Bulk Collection Letters Overview

SedonaOffice offers a feature that allows a User to create collection letters for one or many customers within a particular collection queue in an automated fashion. This feature uses the functionality within Microsoft Word's Mail Merge function. Once the letters have been generated, the customer's collection activity is updated with the title of the letter and the date generated for tracking purposes. This information may also be viewed from the Customer Explorer Collections menu option.

To use this feature, Microsoft Word must be installed on the user workstation that is generating the Collection Letters.

Mail Merge Templates

The bulk collection letters feature works with MSWord templates; a User must first create template letters before using this feature. For detailed information on how to create MSWord Templates, refer to the Mail Merge section of this Help.

There is some setup required to use the bulk collection letter feature. Please follow the instructions for Bulk Collection Letter Setup.