

Bulk Collection Letters Setup

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Bulk Collection Letter Setup is a two-part process; first, the Template Server must be activated, then a list of Template Letters is loaded to the Template Server to be available for selection when setting up new Cancellation Profiles, when editing an existing Collection Profile, or when generating collection letters from a collection queue.

1. To begin the setup of bulk collection letters, first navigate to the Main Application Menu select View/Mail Merge and check the Use Template Server option.

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2. This step is used to create a list of letters that will be available for selection when generating collection letters and selecting default templates for Collection Profiles. Navigate to the Main Application Menu and select Tools / Letter Templates.

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3. The Template List will be displayed. click the Add button located at the lower right of the form to select the letter templates.

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4. The Mail Merge Template Add form will be displayed. In the header area of the form type in the Title, Description, and select a Security Level for the first letter to be uploaded to the Template List. In the Type field, make certain to select Collections.

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Once the header information has been entered, click the button located in the grid list below the header; clicking this button will open the file search form. Navigate to the folder where the template letter is saved, highlight the file then click the open button at the lower right. To add additional templates to the list move to the next line in the grid and select the next template. The Title and Description from the first line will default into subsequent lines; make certain to edit each line to display the correct Title and Description.

5. Once all templates have been selected in the grid, click the Upload button located at the lower right of the Template List. Once the template letter setup has been completed, Users will be able to generate bulk collection letters from Collection Queues.

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