How to Add New Fields to Collection Letter Templates

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Issue:

Customer needs to add new fields to Collections letter templates.

Resolution:

In SedonaOffice, open the Collection Queues by going to Client Management > Collections.

Select a Queue.

Before clicking the Mail Merge button in the queue, go to View > Mail Merge and make sure the option to Show Columns is selected.

If it is not selected, indicated by the check mark, then mark it.

Click on the Mail Merge button.

A window labeled Mail Merge Available Fields will be available.

Select a field from the list by clicking on it and then use the Copy button at the bottom of the window to copy it.

The field can then be pasted to the collections letter template.