



Mortgage Fundamentals Mail Merge

Merge your results directly into your Microsoft Word letters

Avoid errors copying figures

Reduce case handling time

Produce your own document templates

Information for up to five policies provided

Improved processing

With most cases a customer letter will be produced and up until now users have manually transferred the results produced by Mortgage Fundamentals into a separate document. Our mail merge option removes the need to complete a manual task thereby speeding up the overall process and reducing the possibility of errors.

Templates

With the mail merge option comes a standard word template for a one and two policy case. These templates can be adapted to include your own text, letter-head etc. or used to create new templates.

Information available

We provide summary information for up to five policies, this includes the name and address information for the first two parties, the case reference information and the final compensation figure for you to use within your own letters via Microsoft Word.

From release 2.8.2 of Mortgage Fundamentals additional information is available from the new forms. This powerful new feature allows additional information to be stored against clients for use in Mail Merge removing the need to add in more information after the letter is created.

Setting up mail merge

Within Mortgage Fundamentals new options have been added to allow new documents to be added into the system for use. Each document you develop can include a description, the number of policies it applies to and the group the letter is intended for.

Selecting your mail merge document

By pressing the mail merge button within Mortgage Fundamentals, you will be presented with a list of documents available for printing (ordered by number of policies). Once a document is selected Mortgage Fundamentals will run a comparison and automatically start Microsoft Word, displaying the Print menu option. It is also possible to modify your document before printing and saving it if you so wish.

Multiple Departments / Companies

Each document can be restricted to selected groups and this will allow for stationary to be selected by individual departments / companies (this is on the basis that users are split into the correct group within Mortgage Fundamentals).

Requirements

The mail merge interface will only work with Microsoft Word and has been tested against Word 2000, XP and 2003. It may be possible to use the Microsoft Word Viewer available FREE for Windows 98/NT from Microsoft.

Letter creation assistance

We can provide assistance with setting up bespoke documents for you. Please contact us for more information.