

## Setting up a Document Template

Go to System  
Document Templates

Click on Create New  
Name the Letter and select the  
type: i.e Tenant (For a tenant  
letter)

Click on Save and Close  
If the letter is not showing in the  
list, click on the refresh web  
button.

Once you see the letter, click on the  
drop down arrow next to Edit and  
select Edit Document.

Put the cursor in the letter where you  
want to start putting in merge fields  
Check you have the right font and size

Top of page you will see a Merge  
Field box, drop down the arrow to  
find the merge fields you want,  
click on it and it will go where your  
cursor is. Carry on writing the  
letter and entering in the fields

To put a letterhead in the letter,  
just drag and drop a Jpeg (If you  
don't have one, we can make you  
one) You may need to adjust  
margins

When complete click on save.

This letter is now ready to pick  
up in a mail merge or from a  
diary

This is a basic outline please see the help file for more thorough  
details