

Merge Letters

Last Modified on 30/09/2024 4:21 pm AEST



The instructions in this article relate to **Merge Letters**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

A letter can be created within StrataMax using Microsoft Word, which enables the data stored and maintained within StrataMax to generate letters, using merge fields to distribute to owners, office bearers, and creditors to create a generic letter containing a building's data. This is also available from Sub-Groups and will use other debtors.

Once created, all merge documents will run directly in StrataMax without using Microsoft Word, allowing for efficiency in processes for single or multiple buildings.

Merge letters can include additional reports ranging from building and financial reports to further lot-specific reports. If these are frequently used, you can save the set to reuse where applicable.

Merge fields can be inserted from their respective categories and, once added from the [Merge Field Editor](#), can be inserted into the Merge Letter. Renaming the merge fields is also a tool that can create a meaningful description and assist with the creation process.

Merge Letters | Features

- Automatically print an owner welcome pack, including the StrataMax Introduction Letter (StrataMax ID and password) for new and existing owners.
- Tag documents to be building-specific and review lists for the current building only or a global list of documents.
- Merge documents for single or multiple buildings using each contact's preference.
- Merge and edit a document for specific scenarios before distributing the information.
- Merge multiple documents and reports from StrataMax to create a Report Set.
- Send merge documents that can be easily filtered to include or exclude committee members.
- Charging for pages printed or emails sent, including attachments, based on the [Disbursements](#) setup.
- Ability to automatically store documents and reports to [DocMax](#), linking to specific lot accounts where applicable.
- Multiple filters to assist with owner occupied, VIC Account Groups (Multi OC), intro letters not sent.
- Merge Letters are available to be used in a Sub-Group.

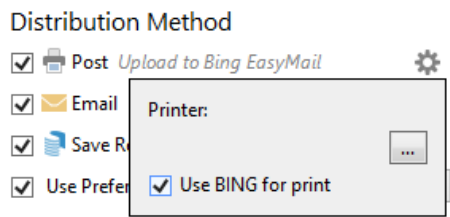
Merge Letters | System Requirements

Microsoft Word must be installed on any computer to create or generate merge documents. StrataMax will support Word and the versions that Microsoft actively supports. To check and confirm what versions are supported, please check the official [Microsoft Office website](#).

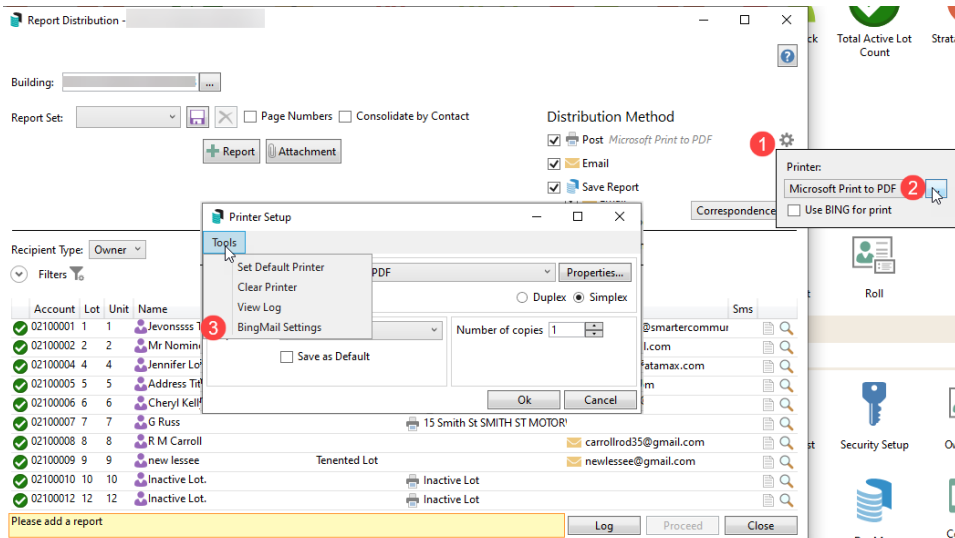
Merge Letters | Bing Mailroom Considerations

The Bing EasyPost API sends documents and reports to contacts using their BingMail Customer Portal. For further information on how this third-party area works, please refer to this article [here](#).

To print to Bing ensure the printer is set to Bing Easy Post API and the option Use Bing for Print is ticked.



The BING login credentials can be checked/entered from the Printer settings.



Enter the BING provided credentials into the fields as below.

The image shows a software configuration window titled "Configuration". The window has a blue header bar with the text "BingMail Settings". Below the header, there are several input fields and checkboxes. The fields are labeled "Account ID", "Portal User", and "Portal Password". There are two checkboxes: "Duplex" (unchecked) and "Hold For Approval" (checked). Below the checkboxes is a dropdown menu labeled "Colour Model" with the value "Full colour" selected. At the bottom right of the window is a "Close" button.

Merge Letters | Settings

Building

This building selector tool can tag multiple buildings and apply standard building filters—for example, by Account Manager or Financial End Month. Remember to clear any building filters that may have been applied after to ensure the next process runs with all buildings as required.

Report Set

Selecting from a pre-configured report set that includes merge letters, attachments, and reports is what this option is designed for. The save and delete icons next to the drop-down selection for the report set will control what action is taken for the selected report set.

Page Numbers

Configuring this setting will include page numbers with a paragraph center position on the merge letter and all attachments.

Consolidate by Contact

This option will consolidate the merge letter and any attachments into one pack for distribution. With this configuration selected, any contact that owns multiple lots will deliver one instance, including all documentation batched into report order. For multiple buildings, this contact will receive one for each.

+Report

Selecting this button will provide access to various building (building icon), owner (person icon) and global (globe icon) reports that can be added to a report set.

Attachment

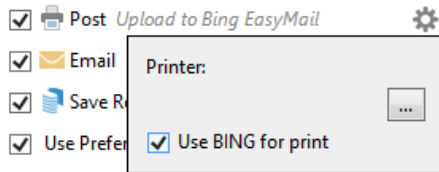
This will open an *Add Document* window from DocMax allowing the user to navigate to the attachment, which may be saved in DocMax or added from a folder location.

Post

For all post copies, this will control the printer, including any BING printers. Configuring a different address priority can also be set here; the default is correspondence.

To print to Bing ensure the printer is set to Bing Easy Post API and the option Use Bing for Print is ticked.

Distribution Method



Email

The email subject and body can be configured here for all email copies, including email merge fields

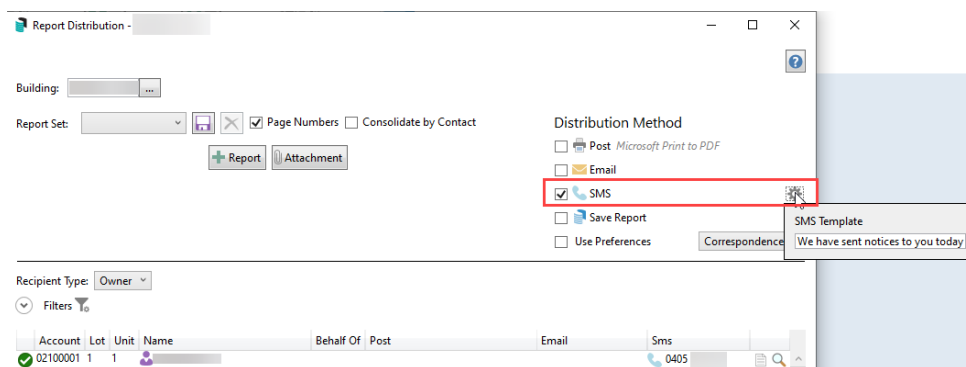
Using BING for email is also set here and is available using the BING API (**charges may apply - contact Bing for further information**). Tick *Use BING for Email* to send email to BING for processing. Emails sent via Bing will not be in the logs of Communications.

Please note that the *Use Bing For Email* has a security control setting which should be reviewed in [Security Setup](#).

Changing the default email preference from correspondence is available here.

SMS

If using a third-party [SMS service](#), this can be configured to deliver to those recipients who have a valid mobile number. This is also where the SMS template is set. If this service is not enabled, the SMS distribution method will not be displayed.



Save Report

The *Save Report* option will save the document and all attachments to DocMax. Checking that a profile has been selected when using this area from the cogwheel is recommended. Select the appropriate profile before generating the documentation to allow the *BCMax System Document* to be added to DocMax.

Use Preferences

With each contact comes their contact preference. This setting will control whether or not these are applied when sending a document and what delivery category to apply. Without the use of preferences, the default will

be posted.

Note: the *Title* field in DocMax will reflect the Merge Letter name, and *BCMax System Document* is the *Added From* condition when searching for these documents in DocMax.

Report Distribution - BUILDING 1 101010

Building: BUILDING 1 101010 ...

Report Set: [Dropdown] [Print] [Close] Page Numbers Consolidate by Contact

Distribution Method

- Post Upload to Bing EasyMail
- Email
- SMS
- Save Report
- Use Preferences

Correspondence [Dropdown]

Filters

Recipient Type

This determines who receives the document by default. Use the drop-down menu to select to change to a different recipient type.

- 'Lot/Owner' is selected by default when merge letters and other owner-type reports are being sent. This recipient type will observe the different contacts in the **Roll** and depending on if the *Use Preferences* box is ticked, will change the recipient list - how and who it's sent to. More filters are available for this recipient.
- 'Other Debtor' recipients are in a Sub-Group, who are in **Debtor Maintenance**. More filters are available for this recipient.
- 'Letting Agent' will observe any lettings agents that are recorded in the **Roll**. No filters are available for this recipient.
- 'Owner' will observe owners only in the **Roll** and will not observe any letting agents or other contact types. No filters are available for this recipient.
- 'Tenant' will observe any tenants that are recorded in the **Roll**. No filters are available for this recipient.
- 'Creditor' will observe any creditor that are recorded in the **Creditor Maintenance**, including any that are hidden. No filters are available for this recipient.
- 'Office Bearer' refers to committee members in **Office Bearers**. More filters are available for this recipient.
- 'Applicant' observes contacts in **Applicant Maintenance**.
- 'Resident' will observe any contacts in the **Roll** that reside in a lot. This will be tenants and any owners that have the *Is Owner Occupied* tick box selected in the 'Change of Details' screen. More filters are available for this recipient.
- For 'Internal Users' this will display the Users who are set up in **Security Setup**.

Committee Member

This filter will allow for a selection of *All*, *Exclude* or *Only*.

Lot Type

Generating correspondence, if there are accounts set for car or storage spaces, and these are to receive the document set as required.

Duplicate

Copy to Owner will allow for a copy to be sent to the Owner when the lot account is configured to have the agent/ mortgagee or other to receive correspondence.

Include Only

- *Committee Meeting Minutes*, *Committee Meeting Notices*, *Advertising OK*: Set to send accounts flagged to receive the nominated areas, which can be set via the Roll's *Correspondence* preferences.
- *Owner Occupied*: Set to send accounts flagged *Is Owner Occupied*, which can be set via the **Roll** within each contact.
- *Intro Letters Not Sent*: For any owners who are yet to receive the StrataMax Introduction letter, set this to send the StrataMax Intro Letter (e.g. available in Change of Ownership) to those who have not received it yet.

Recipient Type: **Owner**

Filters

Committee Member: All Exclude Only

Lot Type: Include Car Spaces Include Storage Spaces

Duplicate: Copy to owner

Include Only: Committee Meeting Minutes Committee Meeting Notices Owner Occupied Advertising OK Intro Letters Not Sent

<input checked="" type="checkbox"/>	Account	Lot	Unit	Name	Behalf Of	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1					
<input checked="" type="checkbox"/>	02100002	3	3					
<input checked="" type="checkbox"/>	02100003	4	4					
<input checked="" type="checkbox"/>	02100004	5	5					
<input checked="" type="checkbox"/>	02100005	6	6					

Log Proceed Close

- *Select all*: This tick box on the far left in the header of the table, is for easily selecting/tagging or removing all recipients in the list. The same function as the keyboard shortcuts *Ctrl+A* and *Ctrl+X*.

Recipient Type: **Resident**

Filters

Owner if no tenant Use lot address (if available)

<input checked="" type="checkbox"/>	Account	Lot	Unit	Position	Name	Post	Email	Sms
<input checked="" type="checkbox"/>	02100001	1	1	Tenant	Doctor Tim Tenant	Unit	tim@ten-ant.com	
<input checked="" type="checkbox"/>	02100002	22	22	Owner	Mike	PO B	coolum@gmail.com	
<input checked="" type="checkbox"/>	02100002	22	22	Owner	Loga	2301	@gmail.com	

Merge Letters | Security Setup

Delete Merge Letter

This will enable access to delete merge letters from the *Merge Letter List* window.

Edit Merge Letter

Access to this function will enable the ability to edit merge letters from the *Merge Letter List* window.

Exclude Lots with Zero Entitlements

Will exclude any lots with a zero entitlement when merging and printing/sending any letters. Both Contribution and Interest Entitlements must be 0 (zero) for the lot to observe this setting. This setting also affects the *Meeting Hub Document Distribution* screen.

Availability of this setting also depends on the permission in the *Security Setup* screen called 'Set Exclude Lots With Zero Entitlements', which is set to *Deny* by default.

Merge Letters | Icon Guide



Shows Report Data for the individual contact. This document or report contains Roll contact card merge fields and is specific to the lot.



Shows Report Data for the selected account. This type of document or report is specific at the lot level and does not rely on Roll contact cards.



Shows Report Data across all buildings. This type of document or report does not contain roll-specific merge fields.

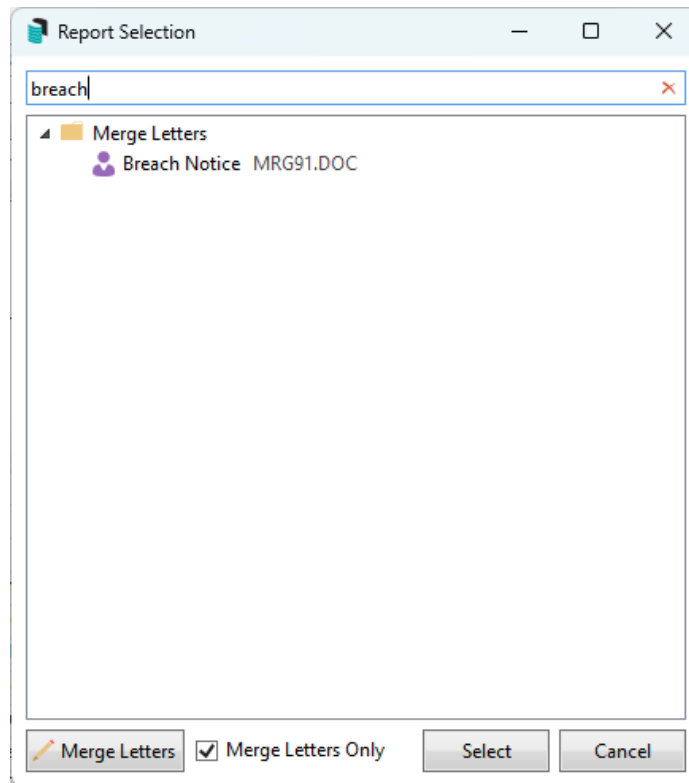


Shows Report Data for selected buildings. This type of document or report does not contain roll-specific merge fields.

Merge Letters | Report Selection

Over time, the number of documents and reports in **Merge Letters** will grow. Using the *Search* field also includes the *Comments* from the 'Merge Letter List' window. There is also a tick box titled *Merge Letters Only*, which can be unticked to include additional reports.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. The 'Report Selection' window will appear. Use the *Search* field to locate the required letter.
3. Select the required letter and click *Select*. This will close the 'Report Selection' window and add the letter to the 'Report Distribution' screen.



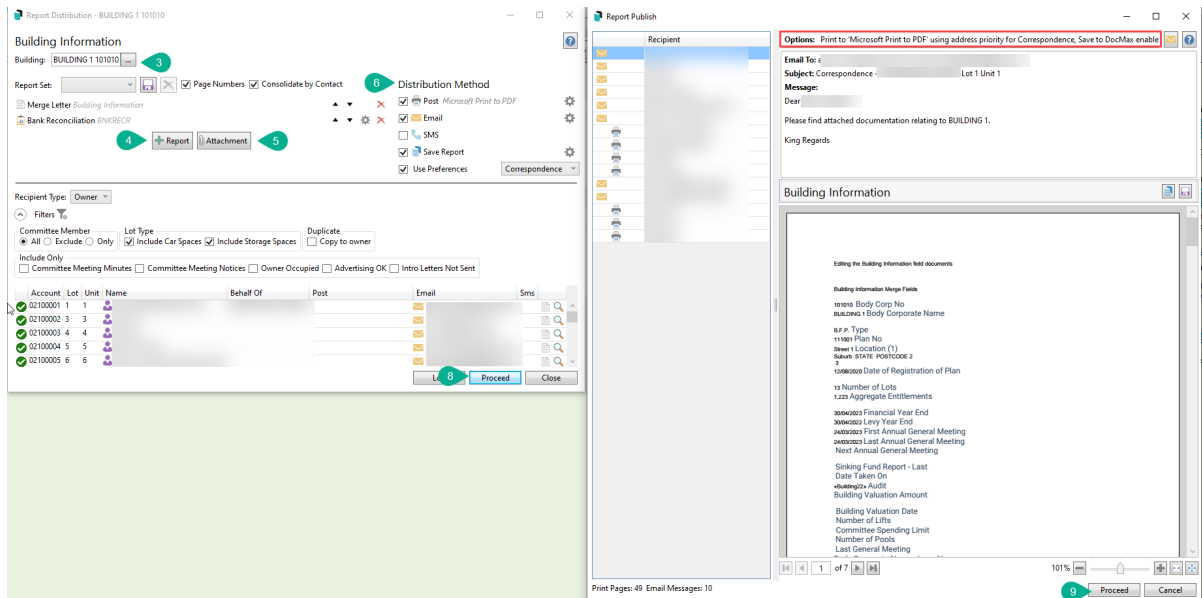
Merge Letters | QRG - Distributing Documents

The instructions below are a quick reference guide to distributing a merge letter and include the basics of this process. We recommend reviewing the rest of this article if you are unfamiliar with the Merge Letter process. Merge Letters can also be distributed from the Sub-Group for **Debtor Maintenance** contacts.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. Select from the existing list of merge letters or click the *Search* field to enter the description or comment information to filter the list. Click *Select* to pick this letter.
3. Select the appropriate buildings if there are multiple buildings to receive this letter from the *Building* tool.
4. If further reports are needed, untick *Merge Letters Only* to produce the list and select each report.
5. If attachments are to be included, click *Attachment* to open the *Add Document DocMax* window and navigate to where the document is saved, noting that a folder location can also be accessed.
 - Use the up and down arrows to change the order of documents and reports if there are multiple.
6. Select each tick box for the appropriate *Distribution Method*. Each tick box
 - *Post* will print to the configured printer, including *Bing Easy Mail*.
 - *Email* to send the document using the StrataMax **Communication** screen. Use the cogwheel to set the **Email Template Manager**.
 - *SMS* will only be visible if the SMS service has been enabled in StrataMax and is to be used to alert the contact that a distribution is to be received.
 - *Save Report* will save the document in **DocMax**. Use the cogwheel to set the required **DocMax Profile**.
 - *Use Preferences* will add or remove contacts from the list of recipients based on the *Delivery*

Preferences for the contact.

7. In the contacts list, if needed, tick the 'Consolidate by Contact' box to send only one copy of the document to contacts who own multiple lots, tag all lots (Ctrl+A) as needed, or tag the required contacts.
8. Click *Proceed* to preview the document in the 'Report Publish' window.
9. Review the results, including the *Options* area (top of the screen), to check the *Distribution Method* and click *Proceed* to finalise.

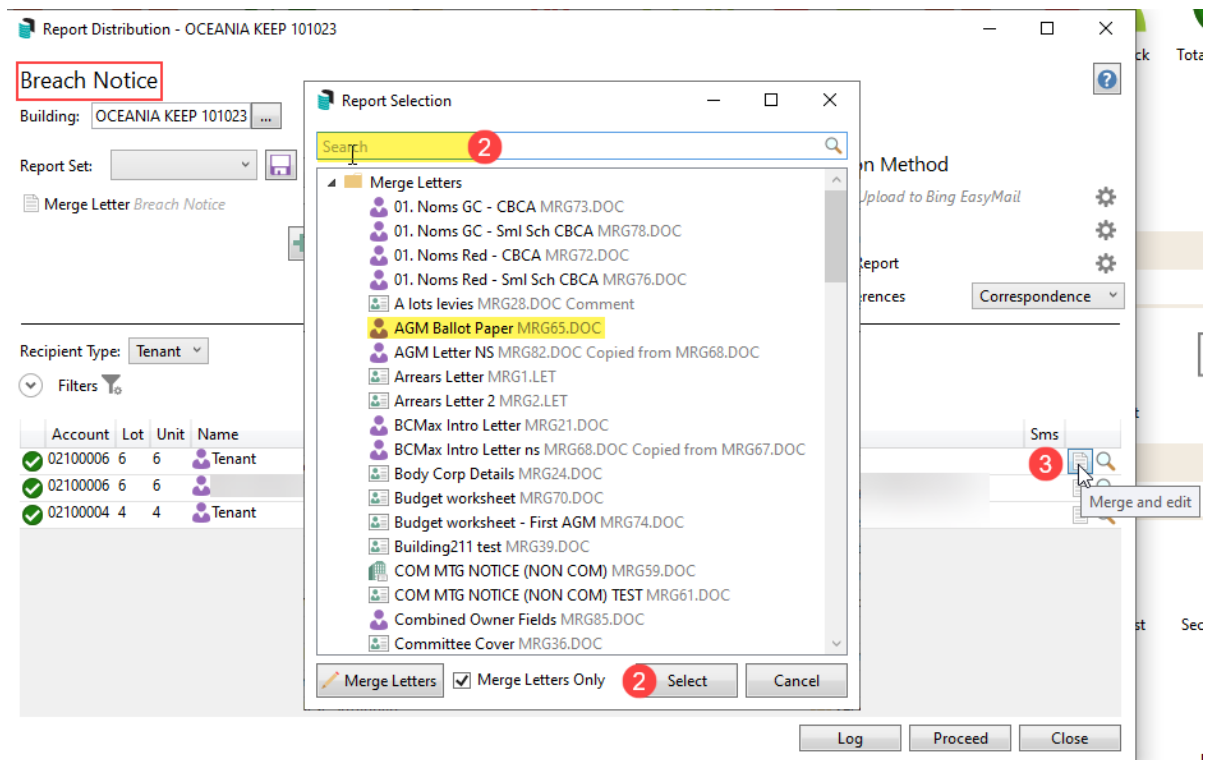


Merge Letters | Merge and Edit Letter

This will allow an individual letter to be merged and edited for a single contact using Microsoft Word. The merge field data will be available when merging and editing in Word. Standard Word tool functions can be applied to the letter, which is helpful for one-off changes to be made to a master template. Using this function applies to a standard Merge Letter and does not apply to a *Report Set* type.

When using this method to send the document, it will need to be sent manually after saving it using Outlook or StrataMax **Communication**. Subsequently, this will not automatically save the document in the **Roll**. If this is required, it must be manually added to **DocMax** and assigned to the lot.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. Search **OR** select the required merge letter from the list. Once selected, the name of the Merge Letter will be noted at the top of the window.



3. Click the *Merge and Edit* icon for the lot required.
4. This will open the document in Word with all the merged field data, and any required changes can be made.
5. When done, click 'Save As' to save the document to a folder in Windows.

Merge Letters | Attachments and Saving Single Files

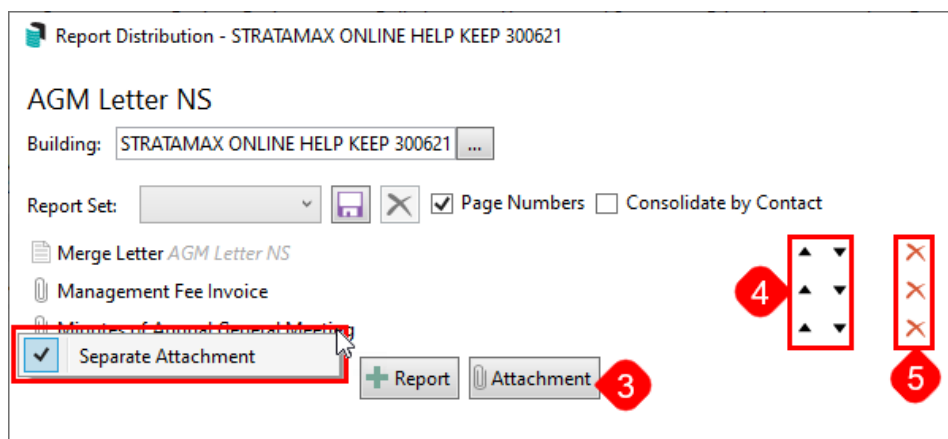
This section covers how to amend and change the order of reports/documents and attachments, and how to e-mail and save all the documents, reports and attachments as a single file.

For further examples of how attachments can be treated, see [the Merge Letters FAQ](#).

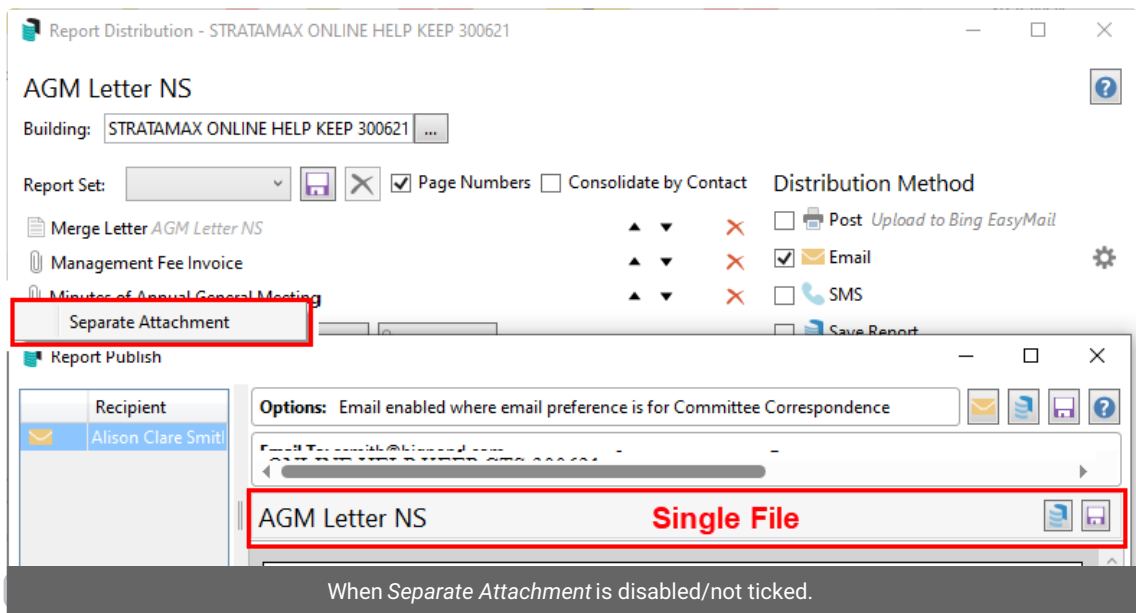
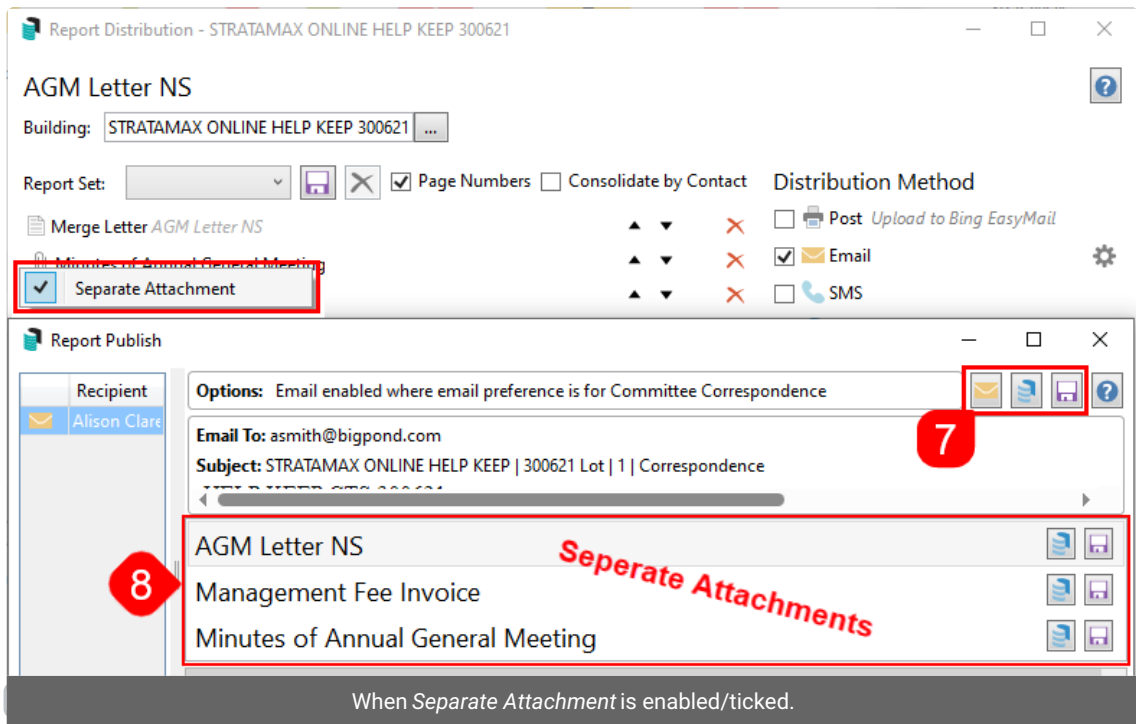
1. Search or select **Merge Letters** from Main or Sub-Group.
2. Select from the existing list of merge letters or click the *Search* field to enter the description or comment information to filter the list. Click *Select* to pick the required document.
 - If other document types are required, untick the *Merge Letters Only* box to display more document types to select.
3. If attachments are to be included, click the *Attachment* button to open the **DocMax** *Add Document* window to locate the document and select it. If the document is not already saved in **DocMax**, a folder location can be added.
 - By default, attachments are separated. By right-clicking on each report, document, and attachment and removing the tick in the *Separate Attachment* sub-menu, all reports, documents, and attachments

will be e-mailed or saved as a single file.

- When removing the tick in the *Separate Attachment* sub-menu, the name of the report or document that is at the top of the list is what will be used when e-mailed or saved as a single file.
 - When reports, documents, or attachment are separated, a record for each letter or report will be created in the *Roll* to view.
 - If included as a standard attachment, these can be previewed in *DocMax* or the email *Communication View Log* screen.
4. Use the up and down arrows to change the order of documents and reports if there are multiple.
 5. Click the red cross icons to delete reports, documents, or attachments.



6. Either click *Proceed* to include all tagged recipients, or click the magnifying glass on the far right to preview the document/s for that one recipient, and the 'Report Publish' screen will open.
7. In the top right of the 'Report Publish' screen, there are a row of buttons:
 - The *E-mail* button will send the documents, reports, and attachments through StrataMax *Communication*. Be mindful of the *Separate Attachment* sub-menu in the 'Report Distribution' screen, as this will determine if the reports, documents, and attachments will be e-mailed as a single or separate attachments.
 - The *DocMax* button will save a copy of the documents, reports, and attachments as a single file in *DocMax*.
 - The *Save* button will save a copy of the documents, reports, and attachments as a single PDF in Windows.
8. Each document, report, and attachment is listed in the 'Report Publish' screen, along with buttons on the far right. However, if the tick in the *Separate Attachment* sub-menu was removed, only a single document will be listed, using the name of the report or document that is at the top of the list in the 'Report Distribution' screen
 - The *DocMax* button will save a copy of that one document only in *DocMax*.
 - The *Save* button will save a copy of that document only as a single PDF in Windows.

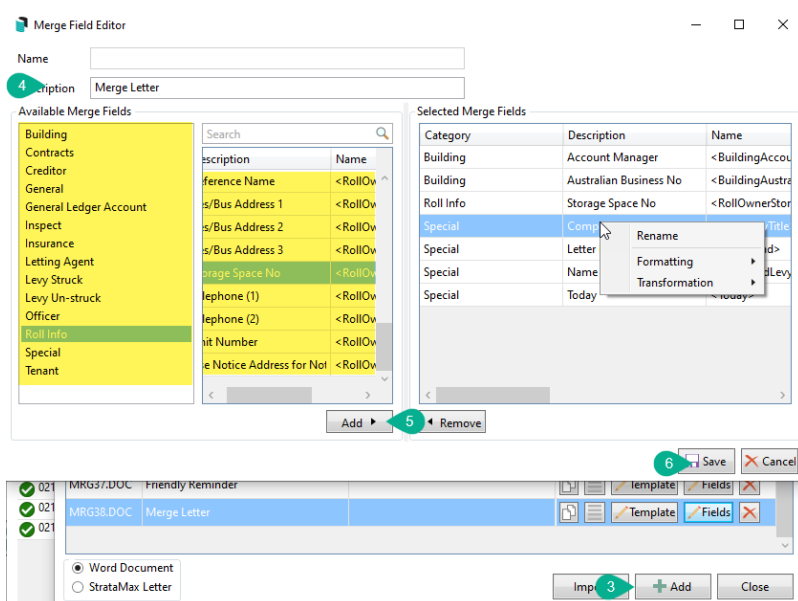


Merge Letters | New Word Document

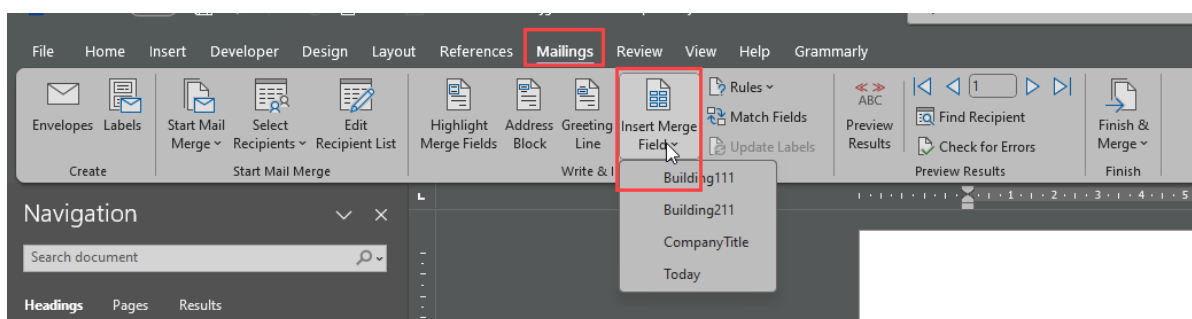
To create a new merge letter, follow the below instructions. For a list of all merge fields available, see [StrataMax Word Document Merge Fields](#).

If this is to be applied, the 'Letterhead' merge field must exist in both the Selected Merge Field area and the Word document itself. If it is not to be included, remove it from both areas.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. In the 'Report Selection' window, click the *Merge Letters* button.
3. Click *Add* to create a new letter, including merge fields.
4. Enter the Merge Letter *Description*.
5. Review the list of available merge categories and fields on the left and select the required field by clicking *Add*. Once added to the *Selected Merge Fields* on the left, these merge fields can be:
 1. Renamed by right-clicking on the merge field.
 2. Have formatting applied around the Boolean, Casing, Dates, Numeric and Time.
 3. Transformation for using word formulas for Boolean, Less, Plus or Trimming text.
6. Once all fields are in the *Selected Merge Fields* area, click *Save*.



7. Create the required document from the Word document. This may include copying and pasting from another source.
8. Review the document using the *Mailings* tab in Word, *Insert Merge Field*, and insert the required merge field. Repeat this for each area that requires a merge field.



9. Click *Save* and *Exit* in Word to have this new merge letter in the list.

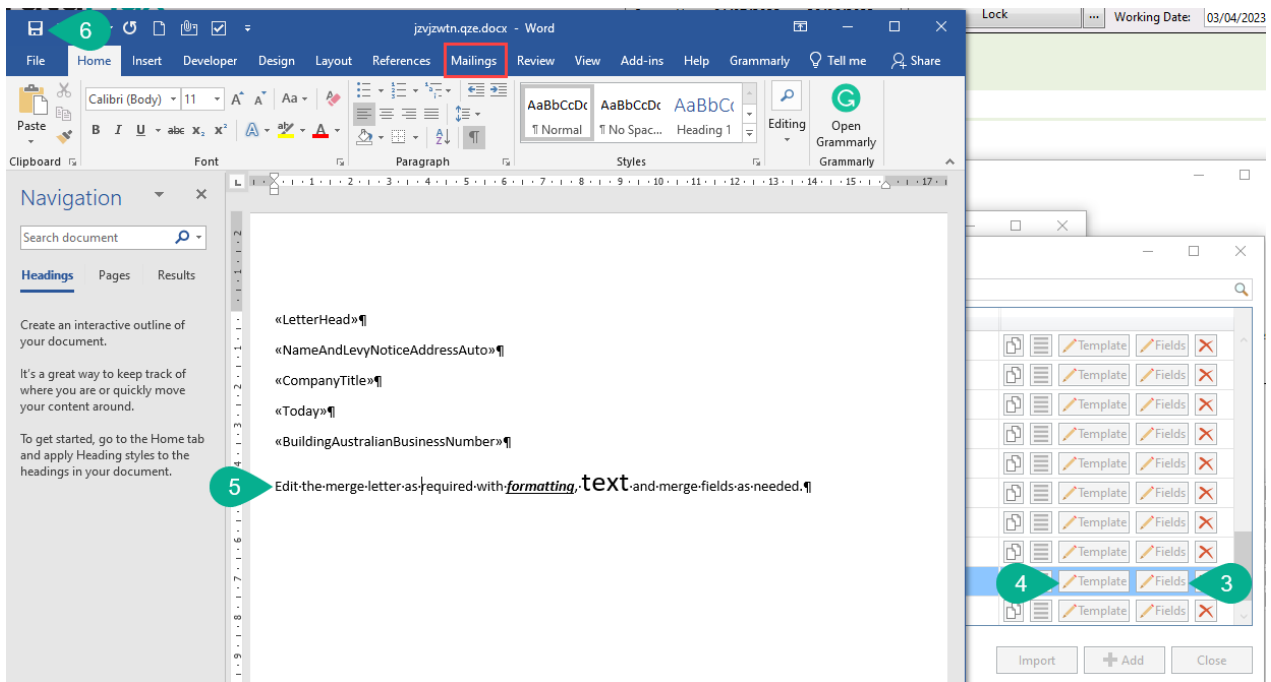
Comments can also be added using the *Comments* icon to define the document or building purpose. Both of these areas will be searchable from the list of Merge Letters.

Merge Letters | Edit Word Document

For any existing Word document merge letters that need editing, follow the below instructions. For a list of all merge fields available, see [StrataMax Word Document Merge Fields](#).

1. Search or select **Merge Letters** from Main or Sub-Group.
2. From the 'Report Selection' window, click *Merge Letters*.
3. Select the letter that requires editing from the Merge Letters List.
4. If the letter requires a merge field review, click *Fields* and insert a new merge field (s) from the list. Click *Add* or from the Selected Merge Fields screen, and click *Remove* to remove any unrequired fields. Click *Save* once the fields have been adjusted.
5. Click *Template* to open the document with Microsoft Word.
6. Edit the document as needed using the standard Microsoft Word tools. If amending merge fields, use the *Mailings* tab, *Insert Merge Field* area to insert any new fields. To remove unrequired merge fields, select and remove these throughout the document.
7. Click *Save* once completed.

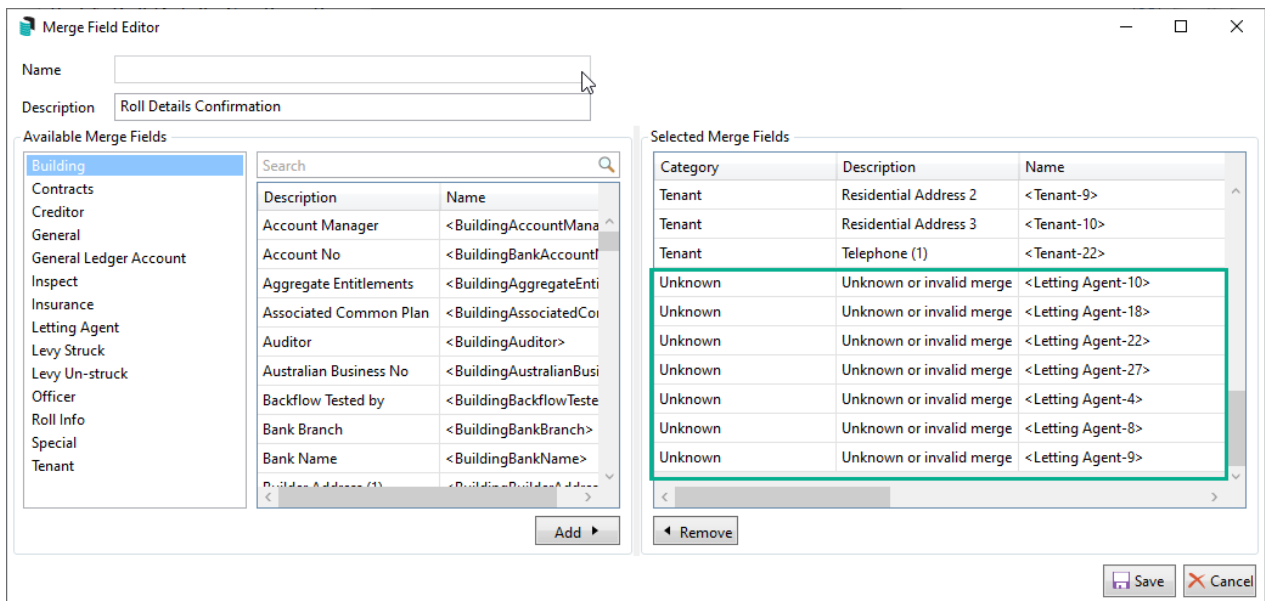
Comments can be added to a document in the 'Merge Letter List' screen by clicking the *Comments* icon. This could be used to note the letter's purpose or including building-specific text, which can help search for merge letters.



Merge Letters | Invalid or Unknown Merge Fields

If there are any invalid merge fields included in the document, which can occur most commonly from the transition to meaningful merge field names or from the Building Information fields that are no longer available, for example, the Post Code field (now managed via Building Address fields) the below process can be applied to update the merge letter and field editor window.

These will be identified in two ways: from the preview window from the merge letter distribution window and the Merge Field Editor area.



To correct these:

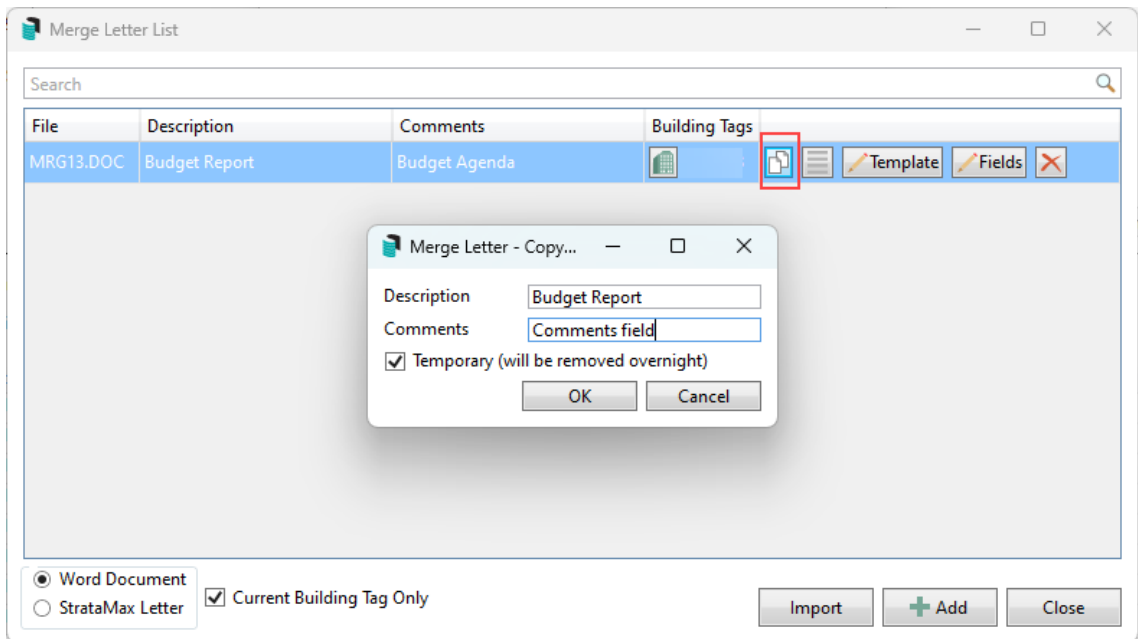
1. Search or select **Merge Letters** from Main or Sub-Group.
2. From the Report Selection window, click *Merge Letters*.
3. Select the letter requiring the edit to field information and click *Template* to open the original document in Microsoft Word.
4. Remove the fields that are unknown or invalid. Click *Save* to remove these fields.
5. Using the same letter in the list, click *Fields* to review the *Merge Field Editor* Table. From this table, select the category and re-insert the updated merge field. Click *Save* once complete.
6. Click *Template* to open the Microsoft Word document and edit the document as needed using the standard Microsoft Word tools. If amending merge fields, use the *Mailings* tab, *Insert Merge Field* area to insert any new fields. To remove unrequired merge fields, select and remove these throughout the document.

Merge Letters | Copy and Edit Merge Letter

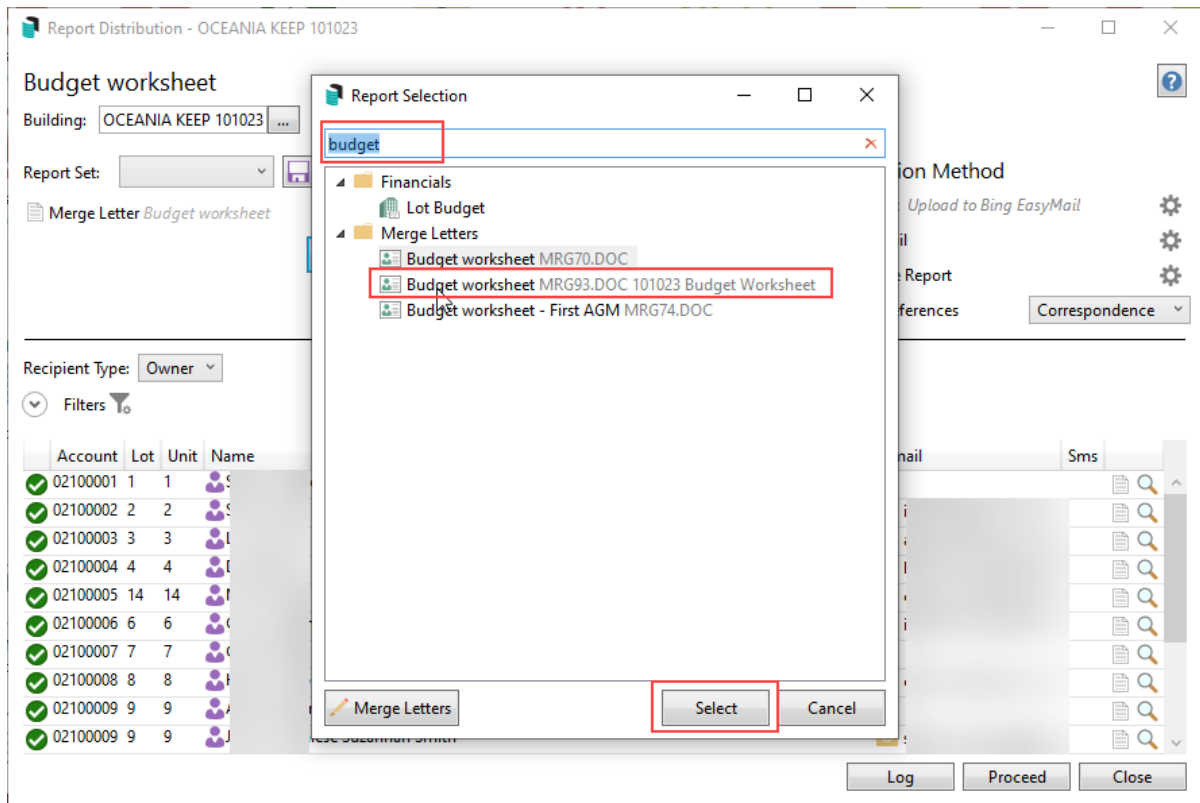
Copying a document and editing it for a particular purpose can be done with the following instructions. Editing a document is the method for creating a local instance of a merge letter, and comments are available to add to identify the document's purpose or building number. For a list of all merge fields available, see [StrataMax Word Document Merge Fields](#).

These will be set for a *Temporary* file, removed on an overnight schedule by default and designed to prevent unnecessary data accumulation.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. From the Report Selection window, click *Merge Letters*.
3. Select the merge letter to be copied and edited by clicking the *Copy and Edit* icon.
4. Review the *Description* and *Comments* fields, changing each as required. Use the *Comments* icon to add building-specific comments, such as the Building Number and description. This will assist when locating the document from the list of Merge Letters.
 - *Temporary (will be removed overnight)* will be ticked by default.



5. Click *OK* to open this document in Word.
6. Amend the document as required for the specific purpose, including text, formatting and merge fields.
7. Click *Save* and *Close* once all relevant areas have been amended in Microsoft Word. This will create a new MRGX.DOC file in the *Merge Letter List*. Click *Close* to the *Merge Letter List*.
8. Use the *Search* field from the *Report Selection* list and enter either *Description* or *Comments* to filter the list. Or scroll to find the merge letter at the bottom of this *Report Selection* window. Click *Select* once the letter has been located.



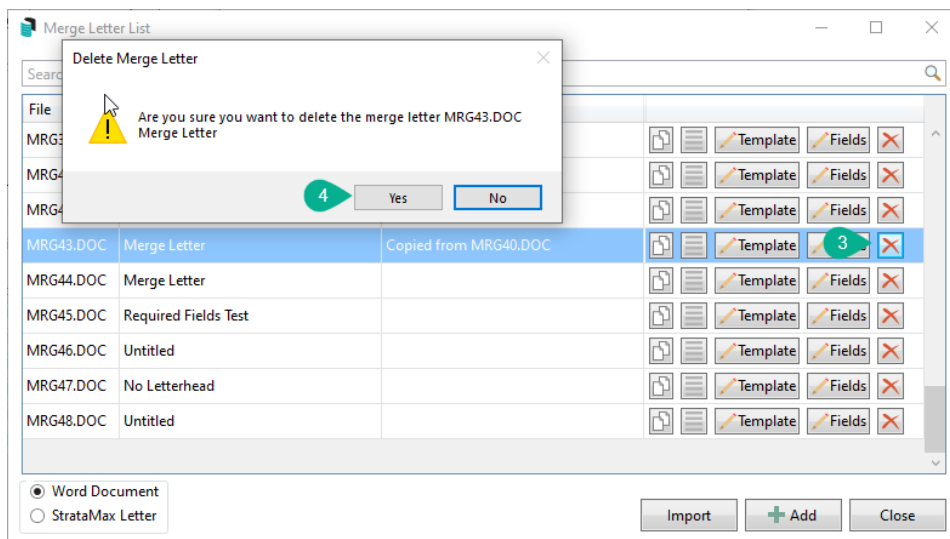
9. Review the *Distribution Method*, checking the cogwheel for each area as needed.
 - o **Use the Post to Print, Email to send StrataMax Communication Email, SMS if enabled to send SMS, and Save Report for DocMax.**
 - Use Preferences: select the delivery preference address for the distribution.**
10. From the *Recipient* area, un-tag any lots if needed and tick 'Consolidate by Contact' if the merge letter will be distributed to the same name owner. (Use Ctrl + X to untag all)
11. Click *Proceed* to preview the distribution from the *Report Publish* window.
12. Review the results, including the *Options* area (top of the screen), to check the *Distribution Method* and click *Proceed* to finalise.

Merge Letters | Delete

If Merge Letters are required to be deleted, this should be exercised with caution, as once the document is deleted from this list, it cannot be reinstated. **Security Setup** options are available to restrict access to deleting merge letters where appropriate.

Before deleting the Merge Letter, it would be recommended to save a copy to DocMax or a folder location should it be required again. Then, it can be imported.

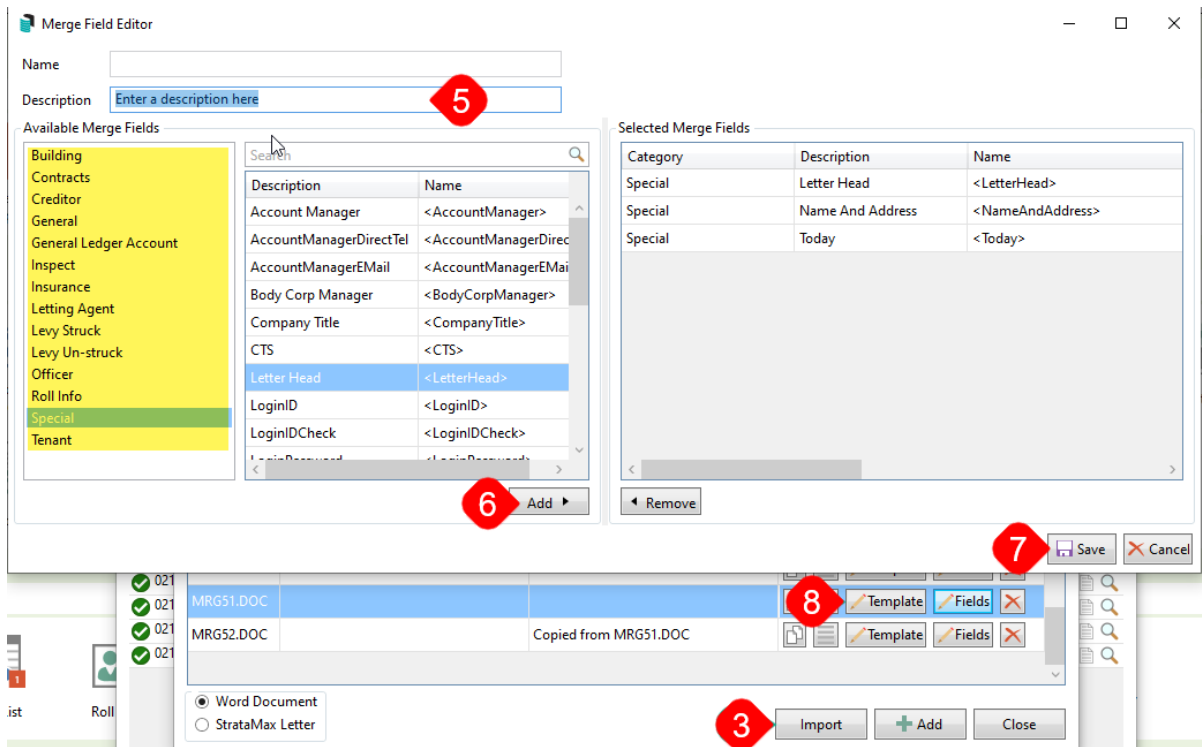
1. Search or select **Merge Letters** from Main or Sub-Group.
2. From the Report Selection window, click *Merge Letters*.
3. Select the merge letter to be deleted. Click the red cross and delete icon.
4. When prompted, *Are you sure you want to delete the merge letter MRGX.DOC Merge Letter?* Select Yes.



Merge Letters | Import

If documents must be imported to **Merge Letters**, including StrataMax merge fields, follow the process below. Using this process can be helpful for multi-drive clients who may want to copy a letter from one drive to another. Another example where this may also assist in importing any internal master templates to access in **Merge Letters**. For a list of all merge fields available, please see [StrataMax Word Document Merge Fields](#).

1. Search or select **Merge Letters** from Main or Sub-Group.
2. In the 'Report Selection' window that appears, click the *Merge Letters* button.
3. Click the *Import* button, and from the Windows Explorer window, navigate to where the document has been saved.
4. Select the document and click *Open*. This will import the document into StrataMax.
5. In the 'Merge Letter List' window, select the document, click the *Fields* button and add a 'Description' for the merge letter.

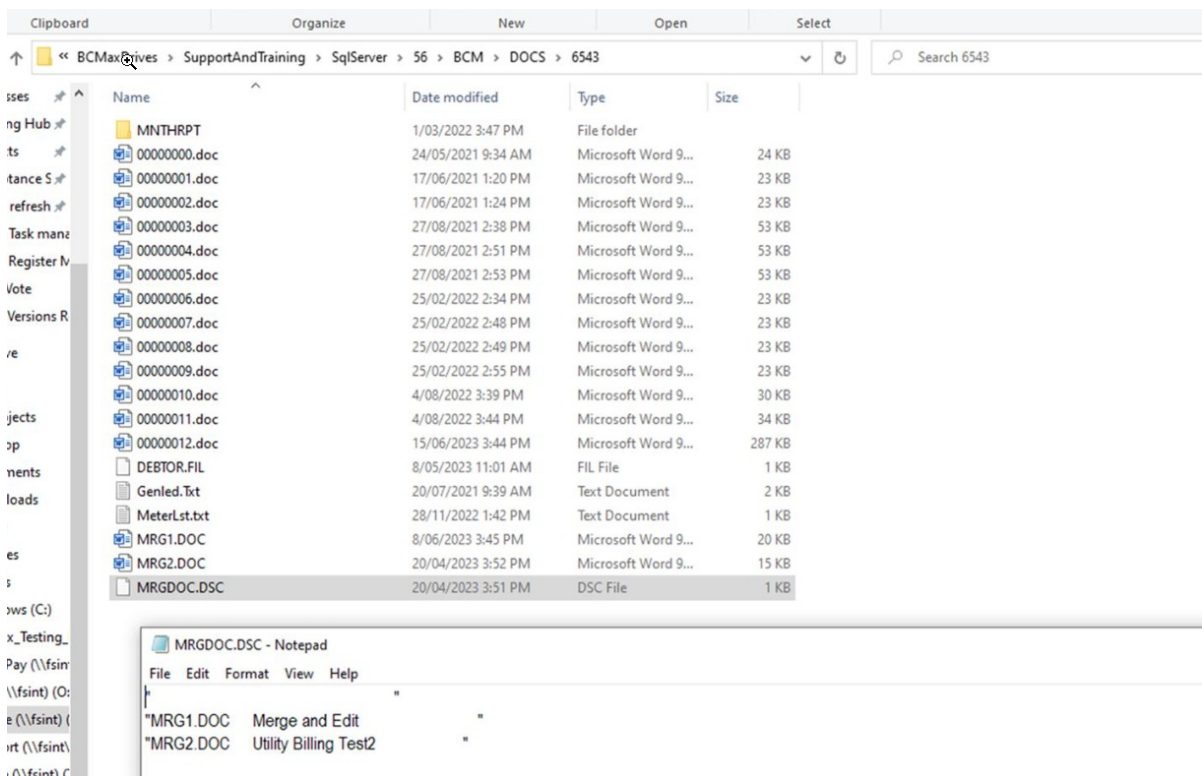


6. Insert any merge fields required. Any merge fields in the original document must have these same fields available in the *Selected Merge Fields* area. From the *Available Merge Fields*, select the merge field required and click *Add* to make them available in the *Selected Merge Fields*. Repeat for each merge field.
7. Click *Save* to save the merge field selection.
8. Click the *Template* button to review the document in Microsoft Word and check the formatting, insert merge fields where required. *Save* and *Exit* in Word once the document has been checked.

Merge Letters | Import Local Deleted Letter

If local merge letters have not migrated or been deleted from the new merge letter interface during any clean-up efforts and the local letter is required to be back in the document list, follow the below instruction. This process is recommended to be completed by the StrataMax Administrator, and caution is exercised when accessing directories.

1. Using the network location for the BCM/DOCS directory, select the local building number that the letter will be saved in.
2. Search for the .DSC file and open this in Notepad, which will describe any local merge letter.

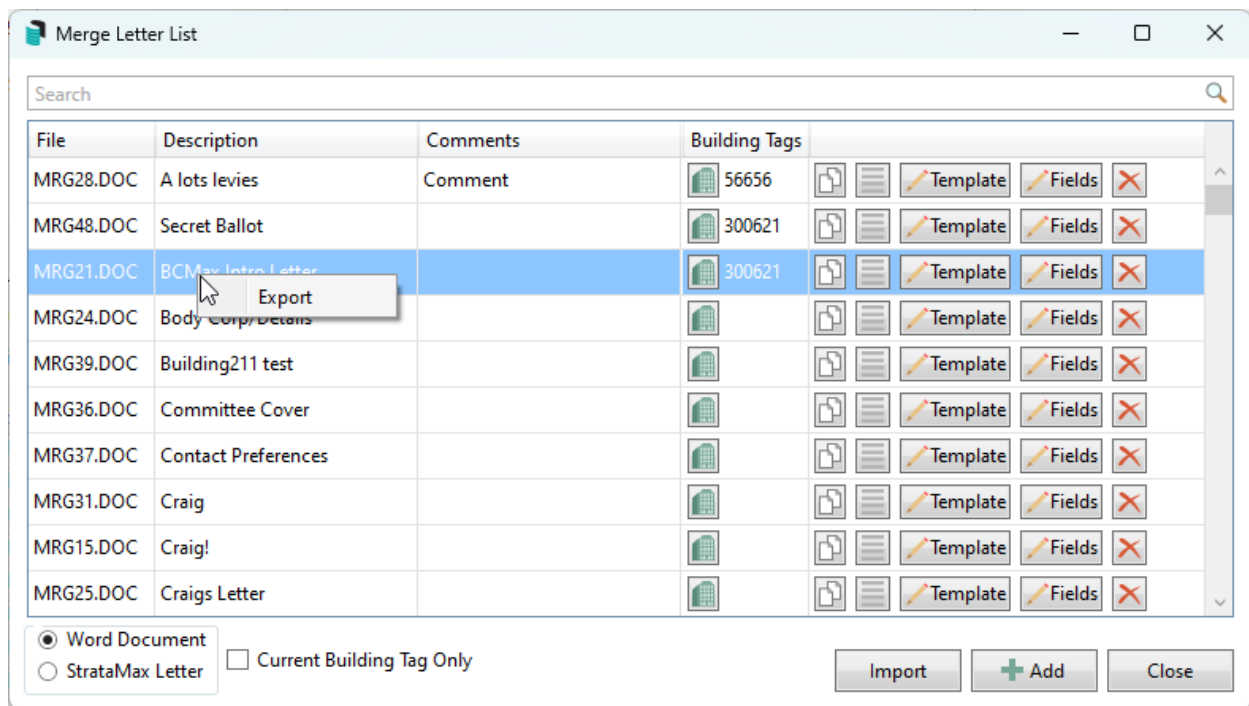


3. Once the MRGX.doc has been identified, open this document and save it as a .docx format.
4. Search or select **Merge Letters**.
5. From the Report Selection window, click *Merge Letters*.
6. Click *Import*, and from the Windows Explorer window, navigate to where the .docx document has been saved.
7. Select the document and click *Open*.
8. Review the document by clicking *Template*, removing any unknown merge fields, and formatting as required. Once complete, click *Save*.
9. Click *Fields* and insert any new fields. Click *Save*.
10. Click *Template* to insert these new fields and replace the unknown merge fields.

Merge Letters | Export

Exporting merge letters can be done, which is helpful for multiple drives. It will allow the letter to be created in one drive, including the merge fields, and easily imported to another.

1. Search or select **Merge Letters**.
2. Click the *Merge Letters* button.
3. Right-click on the required letter from the list of merge letters and select *Export*.
4. Save the document to a file location that can be accessed for [import](#).

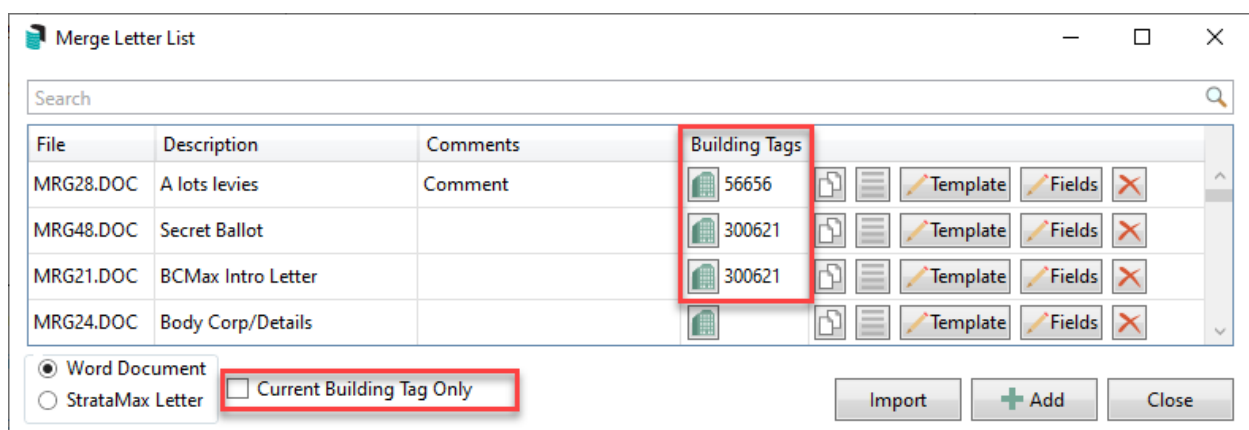


Merge Letters | Building Tags

Merge letters can be assigned to a specific building. When set with a Building Tag, the particular Merge Letter will only be available for selection from that building. A Merge Letter can be assigned multiple Building Tags if required in more than one building, and a star will be displayed next to the Merge Letter in the Report Selection screen to identify this as a local Building Tag.

Assign a Building Tag

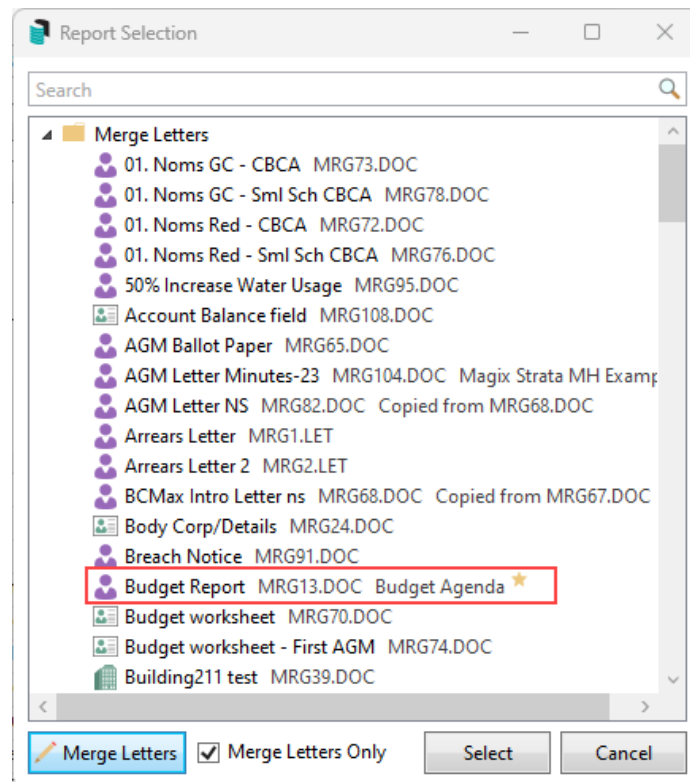
1. Search or select **Merge Letters** from Main or Sub-Group.
2. Click the *Merge Letter* option.
3. Locate the Merge Letter and click on the building icon.
4. A Building Selection list will appear, locate and tag the required building to be selected and click *Select*.
5. The Building Number will be displayed in the Building Tags column next to the Merge Letter.



Tick the *Current Building Tag* only to display Merge Letters applicable to the selected building.

Local Letter View

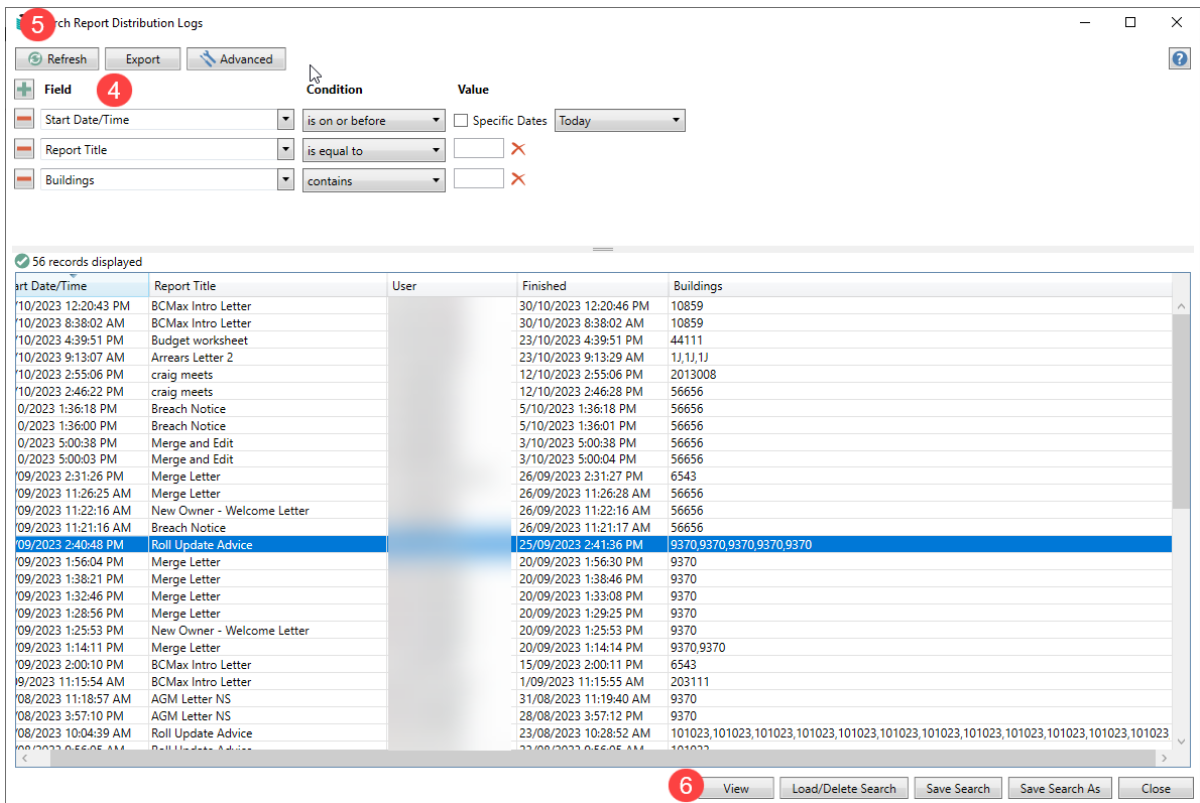
The view below will display when in the building with a local letter tagged.



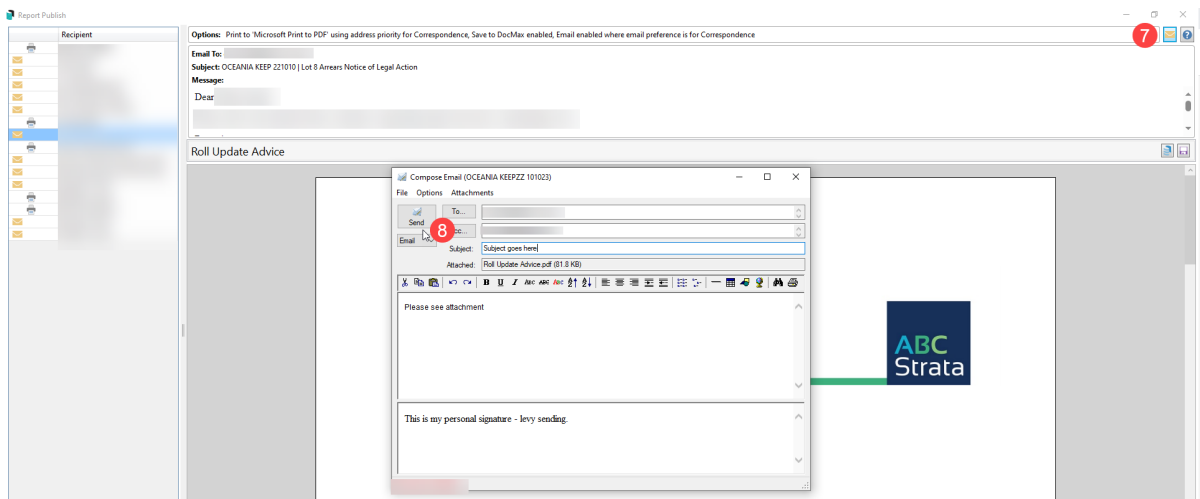
Merge Letters | Log

Using the Log area, you can locate previously sent merge letters and attachments, which can then be resent to an Owner or Building if necessary.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. Click *Cancel* to the report selection screen.
3. Click *Log* to review the Search Report Distribution Logs window.
4. Apply restrictions for date/ time, buildings and any other relevant search parameter.
5. Click *Refresh* to view results.



6. Select the required mailing from the list and click **View** to view the distribution(s).
7. If required to resend information, click the required recipient and click the *Email* icon. Use the *Too...* button to select from the Owners list.
8. Select the Owner, add a subject and click **Send** to resend this information.



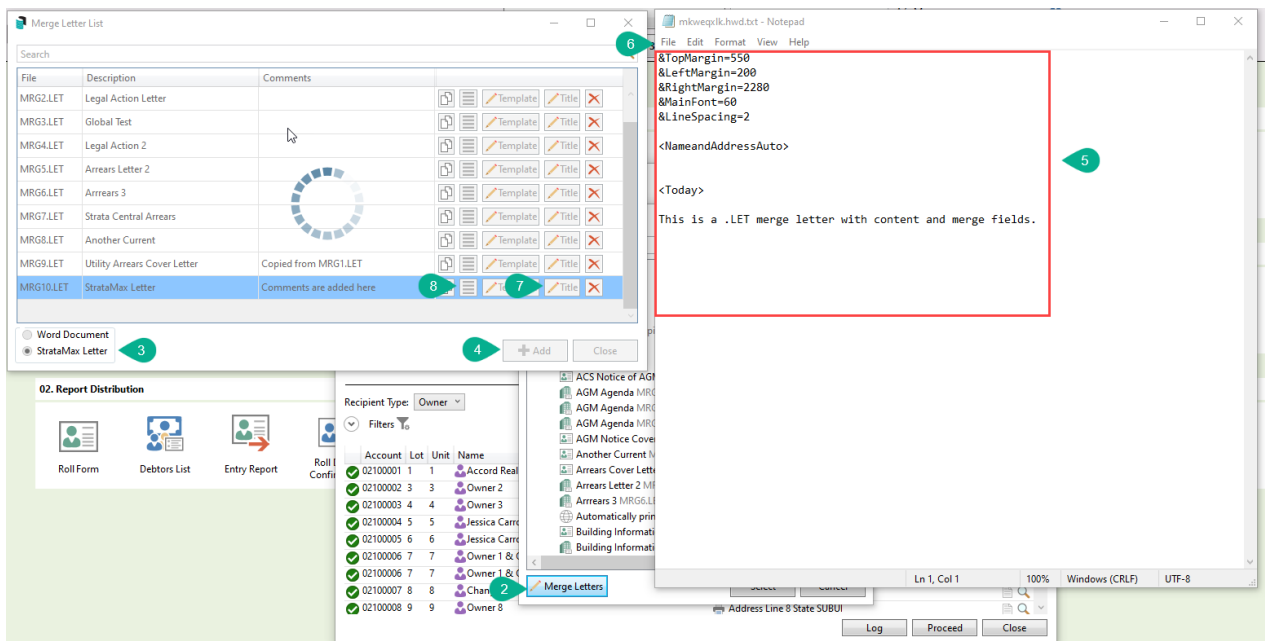
Merge Letters | New StrataMax (.LET) Letter

StrataMax Letters are text documents that are used in other areas of the program to produce merge letters. Some of these areas include the arrears letters or legal action area. This area is used for creating or editing existing letters and assigned to the relevant menus for processing. It is a .LET file type.

Please see [Notepad .LET Merge Fields](#) for further information on formatting and merge fields available in this

area.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. From the Report Selection window, click *Merge Letters*.
3. Move the selection in the bottom left from *Word Document* to *StrataMax Letter*.
4. Click *Add* to create a new letter. This opens a Notepad window with pre-configured formatting tags for margins and fonts.
5. Review the letter's content, insert any text and merge fields as needed.
6. Click *File > Save*, or press *Ctrl + S* on the keyboard. Close the Notepad file.
7. Click the *Title* field, enter a Description for the letter, and click *OK*.
8. If *Comments* are required, click the *Comments* icon and enter these. Click *OK*.



Merge Letters | Edit and Delete a StrataMax (.LET) Letter

Editing and deleting an existing StrataMax Letter will require permission to edit and delete the letter in **Security Setup**. Based on these permissions, letters can be edited using the instructions below. Deleting a letter is done with the red X and confirming you are sure that you want to delete the merge letter. Note that a StrataMax Letter, once deleted, cannot be retrieved. Please consider this before deleting any letters.

Please see [Notepad .LET Merge Fields](#) for further information on formatting and merge fields available in this area.

1. Search or select **Merge Letters** from Main or Sub-Group.
2. From the Report Selection window, click *Merge Letters*.
3. Move the selection in the bottom left from *Word Document* to *StrataMax Letter*.
4. Select the letter that requires amendment from the list of existing StrataMax Letters and click *Template*.

5. Review the letter's content, editing any text and merging fields.
6. Click *File / Save*, or click *Ctrl + S* from the keyboard. Close the Notepad file.
7. Check any *Title* and *Comments* fields as required and add or edit if needed.

Merge Letters | Copy and Edit StrataMax Letter

If there is an existing StrataMax Letter that contains merge fields or text that is useful to apply to another merge letter, this can be copied and edited for a new letter. The below instructions will assist with this process.

Please see [Notepad .LET Merge Fields](#) for further information on formatting and merge fields available in this area.

1. Search or select **Merge Letters** from Main or Sub-Group.
 2. From the Report Selection window, click *Merge Letters*.
 3. Move the selection in the bottom left from *Word Document* to *StrataMax Letter*.
 4. From the Notepad window, amend any text or merge fields for the new letter that will be available once saved and closed.
 5. From the list of StrataMax Letter's the copied letter will be available with *Comments* confirming which letter this was copied from. Edit these *Comments* if needed by clicking the *Comments* icon and amending.
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