

# 1 MortgageStream Letter Templates

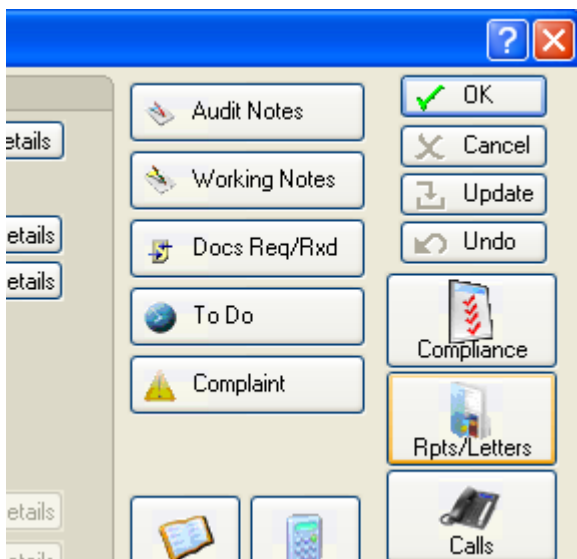
By amending the standard letter templates in the relevant Leads, Cases etc, you can have an unlimited number of customised letters ready to create mailmerged letters at the touch of a button, thus making your case processing more time efficient and automatically storing the letter, which is time & date stamped, and ready to view again at any time in the future.

The user logged into the system must have **level 5 System Configuration** privilege to be able to create & edit new templates. (See the [Changing User Permissions](#) for further details on user login permission changes)

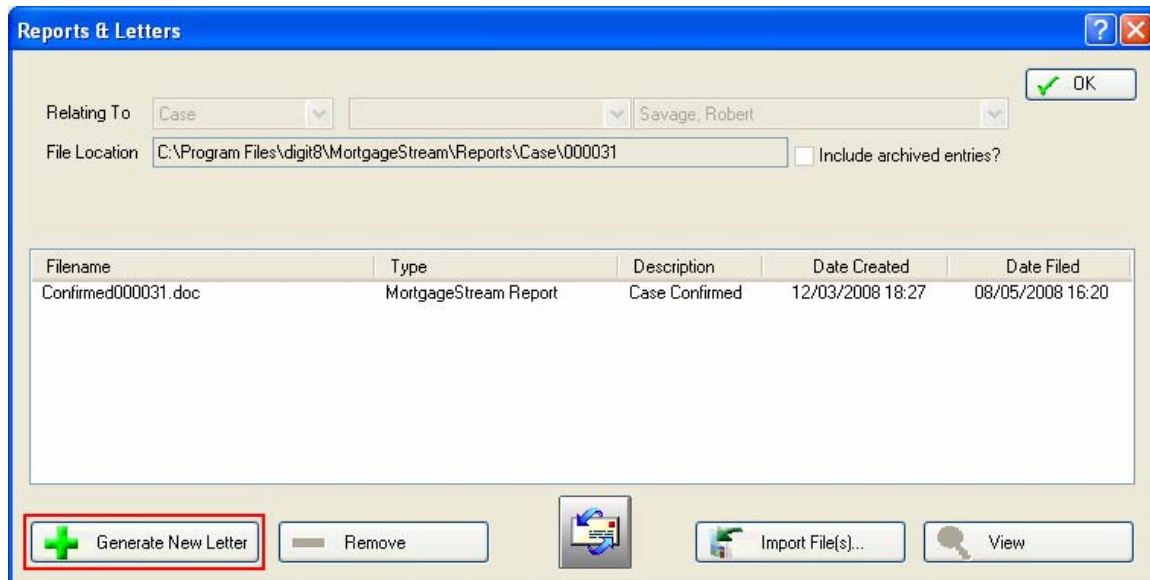
1. Once logged into MortgageStream click **View Cases** on the **MortgageStream Home Page**.



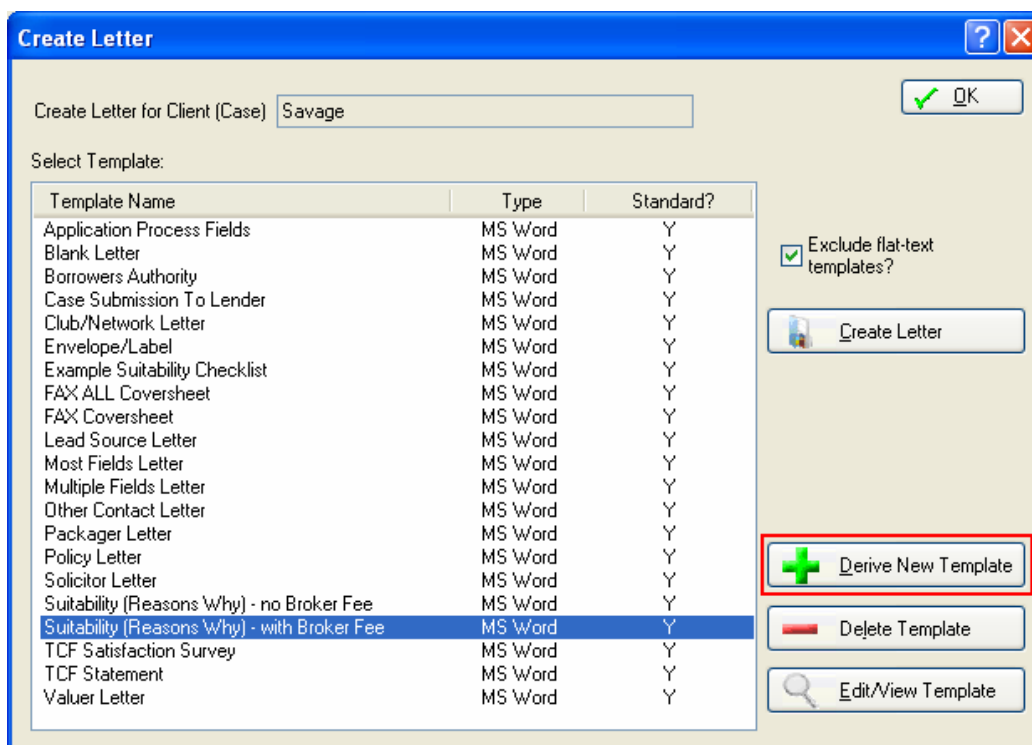
2. Open any case and Click on the **Reports & Letters** Button;



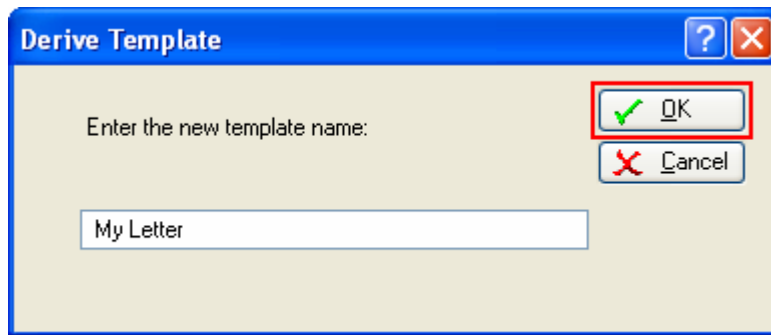
- This opens a window that will display not only any Word documents that you produce, but all scanned client documents e.g. P60s, Passports, Mortgage Application, offer, valuation. Therefore, at the end of a case you will have all documents relating to the case held within one case folder;
- Click on the Generate New Letter on the bottom left hand side



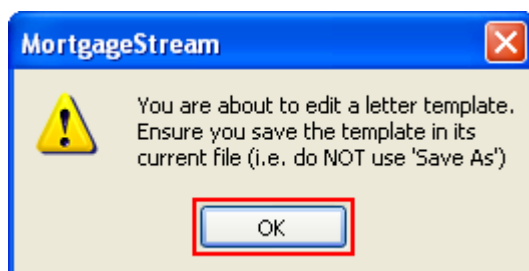
- This window will show Standard Templates that you can derive new letter templates from. They vary in mail merge fields from basic client 'Blank Letter' to the maximum merge fields in 'Multiple Fields Letter'. Decide which template would be suitable for your standard letter that you want to create/amend;
- Click on the relevant letter, then click **Derive New Template**



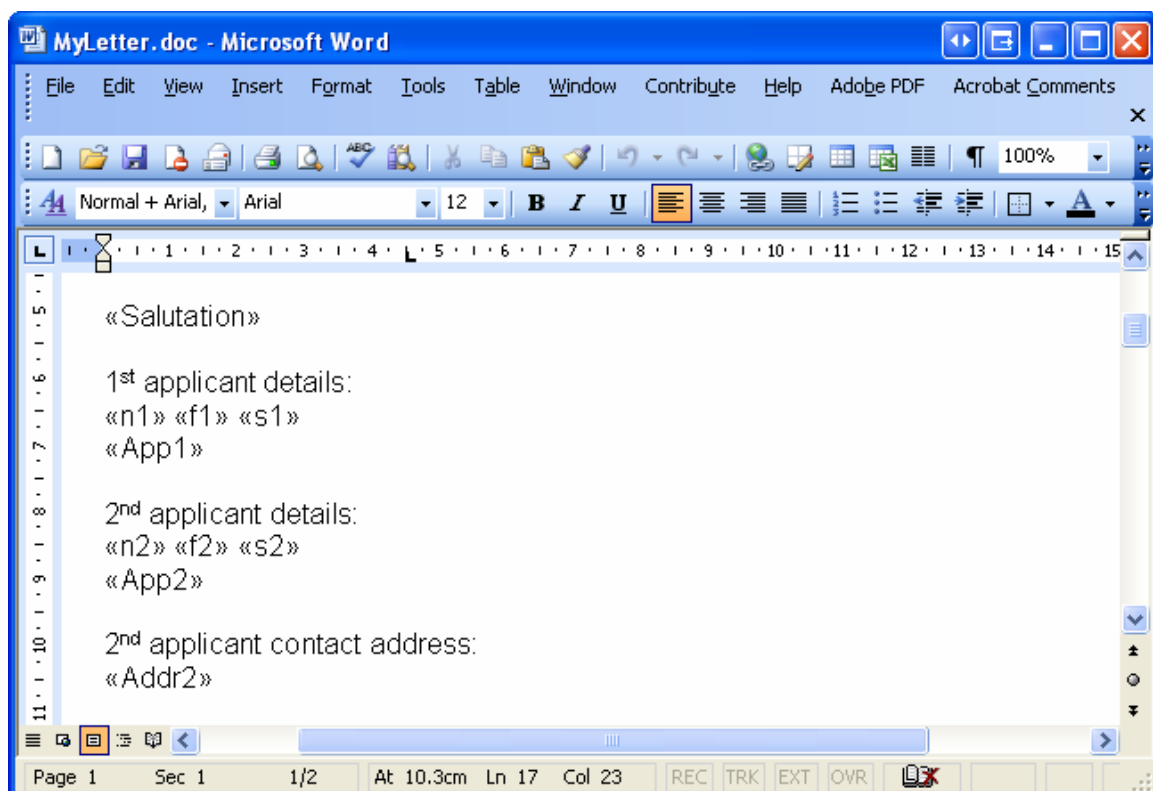
7. Enter a template name in the box provided, and Click 'OK'



8. A warning will appear reminding you not to 'Save As', click OK, as shown;

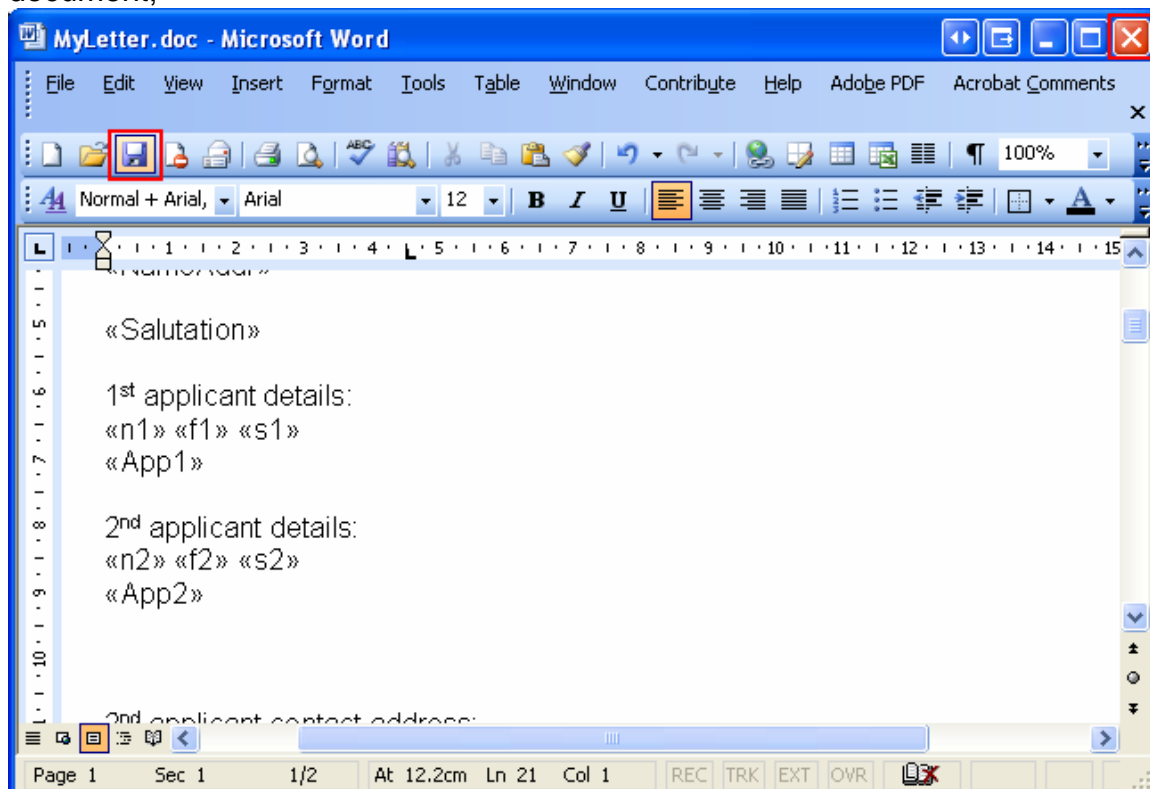


9. You will then see the basic letter with merge fields: e.g. «Recipient» «Address»



10. Type in your letter using the merge fields as appropriate. Delete any fields that are *not* required. If you do not have printed headed paper, then you can use the standard Word > View > Header/Footer to edit header text or include an image to give the appearance of headed paper.

11. Click the Save button in Word (The icon that looks like a floppy disc), then close the document;



12. The new letter template will now appear in your list;

13. To generate your new letter (from any case):

- a. click and highlight the letter template name, click **Create Letter**.

