Overview of Mail Merge Field Names for your Letters

WorkCenter has several major Field Listing Group Names for use with programming your letters and documents so WorkCenter can merge this data and allow you to send personalized and customized documents to your clients. You can print, email and send the documents using Action Plans. This flash video will cover the major listings and give you a brief reason when you should use the specific field list names.

Two methods of accessing the Field Lists Groups:

#1. Go to your Library tab, right click on any letter and select "edit item". The document will open and then you can click on VIEW and SHOW FIELD LISTS.

#2. When you open WorkCenter, you can click on VIEW and then select AVAILABLE FIELDS.

For this flash video we will edit a letter in our library and then view the Field Listing groups using step #1 above. As you can see, there are several major groups showing in this screen view.

1. **Constants: These fields are universal and will populate data into your letters and emails from any LOS system after you have imported or synced this data into WorkCenter.**

2. **Contacts: These are field listing names for when you wish to populate your documents using the contact record information.**

3. **FNMA: These are FNMA access and mail merge fields for anyone who has access to the FNMA database format. We usually only find technologists using these fields.**

4. **Loans: These fields will populate your documents for LOS files imported into WorkCenter. As you can see on the next level we have a listing for Point names. If you are using Calyx Point we would also suggest you consider programming your letters and documents with the "Loans" field listing. If for some reason you or your organization changes from Calyx Point to another LOS, your letters will still populate correctly.**

5. **Point: These fields are used to mail merge Calyx Point borrower and prospect file data.**

6. **Standard Fields: These are standard file names for Contacts, Borrowers, Date and Spouse information.**

7. **Images Custom fields: If you wish to populate documents with any of your custom fields inside WorkCenter, you would use these names. You can find your Contact and Loan custom fields in the tabs found in each contact record. You can also see the major lists by going to TOOLS, SETUP OPTIONS and then selecting the OPTIONS/LISTS tab.**

8. **My Custom Fields: These fields will add your personal information to each of your documents from your personal file inside WorkCenter. You can find your personal information documentation by clicking on TOOLS, SETUP OPTIONS and then selecting the Custom Fields tab.**

When you use these field listing names in creating or editing your letters and documents, keep in mind what data you wish to populate and include in your letter. If your letter contains both contact

information and loan information you will need to view this flash video: Action Plans - #6 Using the Correct Loan or Contact Data in an Action Plan. This suggestion is especially true if your letters contain third parties that are associated with the loan such as listing or selling agents.

For more information on editing and creating letters, read the Quick Start Guide or view the other flash videos.