

Adding New Letters and Documents to your Library

Your personal copy of WorkCenter comes standard with letters and email messages for your use. Like all companies, you will have personalized forms and letters that you will want to get into your library of forms.

You have three options to add new letters, emails and documents to your library.

Option #1: Use can duplicate an existing letter and edit the letter using your personalized form. To use this process, review the following flash video: **“Library - #3 Duplicating an existing letter or form”**.

Option #2: Import your letters directly from your Outlook inbox if you have these forms emailed to you. View the following flash video for instructions using Outlook: **“Outlook - #3 Adding Outlook incoming email forms to your library”**.

Option #3: Drag your personalized letter or document into the library area of WorkCenter from your desktop.

When using this approach, you will need to complete the following steps:

Step#1: Open WorkCenter and drag the personalized letter from your desktop into the library area in WorkCenter. A “Library Item” box will appear. You need to tell WorkCenter the “Type” which is what library you wish this document to be loaded into. If you wish to create a new Library Tab for this letter, simply type the name in the “Type” Box. If you wish to use an existing library, click the down arrow and select your library.

Step #2: The “Category” box is the sub-heading in your library. For example, you wish this letter to be in the “Letters” library and listed under the “Category Applicant”.

Step #3: Name the document an appropriate name in the “Document Name” box.

Step #4: You can also customize your personal email message for this particular letter or document by completing the “Email Subject” box.

Step #5: When completed, click the “OK” box to import your letter.

Step #6: Once the letter or document is loaded into your WorkCenter library, find the document and right click on the form and select “Edit Item”. You will now need to add your custom field listing names to this letter or document so it will be automatically populated from the data in your database.

To accomplish this, please view the flash video: **“Library - #11 Adding Mail Merge Features to your Documents”**.

