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# Managing Mail Merge Documents in Community Development

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# Mail Merge Overview

...What will we be focusing on today?

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# Mail Merge Overview

- Where to locate Mail Merge Form “Standard Templates”
- The Difference between RTF and XML links
- How to Format an RTF form
- How to Format an XML form
- Permit Form vs. License Form
- Permit From Letters vs. Case Form Letter





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# How to Format a Mail Merge Document

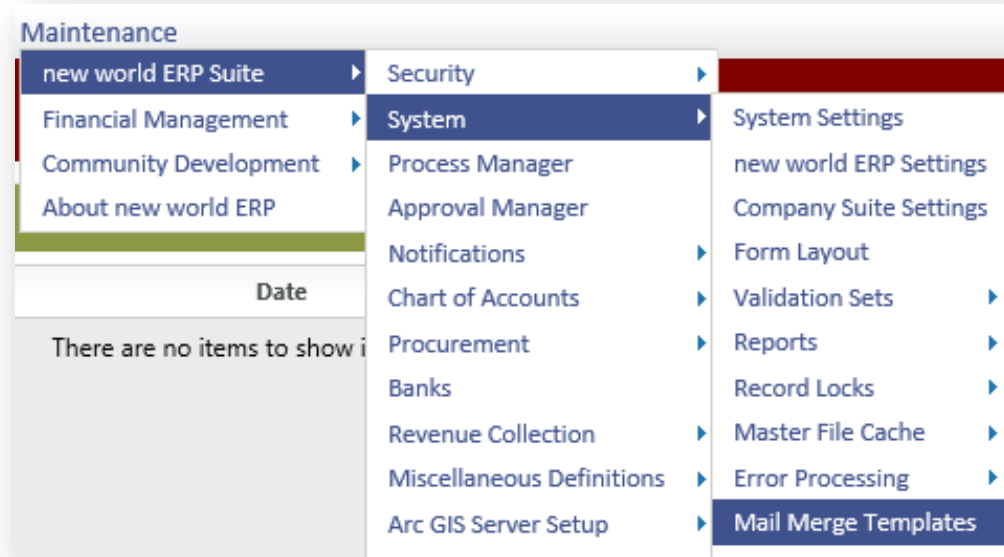
...Using the Sample Templates with RTF or XML Links

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# Mail Merge “Sample” Templates













- How do I navigate to Mail Merge Templates?
  - Maintenance
  - new world ERP Suite
  - System
  - Mail Merge Templates



# Mail Merge "Sample" Templates

## Mail Merge Templates

Mail Merge Types Sample Templates

Status	Description
	Sample Utility Managemer
	Sample Special Assessmen
	Sample Special Assessmen
	Sample Special Assessmen
	Sample Licensee Form Leti
	Sample Inspectors Worksh
	Sample Special Assessmen
	Sample HR Benefits Confir
	Sample FM Vendor Service
	Sample FM Vendor Mass F
	Sample HR Contract Statei
	Samole Case Form Letter )

View

Open

New

This is a mail merge form letter that pulls together information for the Licensee.  
It can be altered to show just a summary or more detail using the fields listed below.  
This is just a sample form and should be formatted specifically for your needs.

### Sample - Licensee Form Letter

This is today's date. See Appendix for details on how to format differently.  
**September 22, 2016**

This information comes from the Licensee.

Name	<a href="#">Name</a>
Type	<a href="#">Type</a>
Last name/business	<a href="#">Last Name</a>
Phone number	<a href="#">Phone</a>
Address	<a href="#">Address</a>
City	<a href="#">City</a>
State	<a href="#">State</a>
Zip code	<a href="#">Zip</a>

These are the licensee user-defined Fields

<a href="#">Attribute1</a>	<a href="#">Value1</a>
<a href="#">Attribute2</a>	<a href="#">Value2</a>
<a href="#">Attribute3</a>	<a href="#">Value3</a>
<a href="#">Attribute4</a>	<a href="#">Value4</a>
<a href="#">Attribute5</a>	<a href="#">Value5</a>
<a href="#">Attribute6</a>	<a href="#">Value6</a>
<a href="#">Attribute7</a>	<a href="#">Value7</a>
<a href="#">Attribute8</a>	<a href="#">Value8</a>

Date Checked Out

# RTF vs. XML Links

- What is the difference between RTF vs XML?



# RTF vs. XML Links

- **RTF links**

- Permit Form
- Permit Form Letters

**PERMIT**  
*City of New World Systems*

[[#start:letter]] [[pagebreak]]		[[date]]
Print Date:	9/22/2016 10:43:54 PM	
Permit ID:	[[PermitID]]	
Permit Types:	[[PermitCode]] [[PermitDescription]]	
Permit Number:	[[PermitNumber]]	
Application Number:	[[PermitApplicationNumber]]	
[[JurisdictionDescText]]:	[[Jurisdiction]]	
[[ParcelNumberTitle]]:	[[ParcelNumber]]	
Service Address:	[[CentralServiceAddress]]	
	[[City]], [[StateVal]] [[Zip]]	
Phone Number:	[[PermitPhoneNumber]]	
Phone Number Ext:	[[PermitPhoneNumberExtension]]	

- **XML links**

- License Form
- License Renewal Form
- License Delinquent Notice
- Case Form Letters

Sample – License Form

[CompanyName](#)

Printed Date:	9/22/2016	License Number:	<a href="#">LicenseNumber</a>
Issue Date:	<a href="#">LicenseIssuedDate</a>	Effective Date:	<a href="#">LicenseEffectiveDate</a>
Renewable:	<a href="#">RenewableLicenseFlag</a>	Expiration Date:	<a href="#">LicenseExpirationDate</a>
Veterinarian:	<a href="#">CurrentVeterinarianName</a>	Animal Altered:	<a href="#">AnimalAltered</a>
Pet Name:	<a href="#">AnimalName</a>	AnimalYearOfBirth:	<a href="#">AnimalYearOfBirth</a>
Tag Number:	<a href="#">TagNumber</a>	AnimalMarkings:	<a href="#">AnimalMarkings</a>
Business Activity:	<a href="#">BusinessActivity</a>	AnimalPedigreeName:	<a href="#">AnimalPedigreeName</a>



# How to Format an RTF Form

- Copy/Paste Links but MUST use **Start & End Letter**

**CITY OF SUMMERSVILLE  
OFFICE OF BUILDING INSPECTIONS**

2000 SUNSHINE LANE • TUCSON, AZ 85472 • PHONE (111) 2222 - 3333

[[#start:letter]] [[pagebreak]]

---

**[[PermitDescription]]**  
**[[PermitNumber]]**

---

ISSUE DATE: [[IssueDate]] EXPIRATION DATE: [[ExpirationDate]]

---

PARCEL NUMBER: [[ParcelNumber]]  
PROPERTY ADDRESS: [[CentralServiceAddress]] [[City]], [[StateVa]] [[Zip]]  
PROPERTY OWNER NAME: [[PrimaryOwner]]

ISSUED TO NAME: [[IssuedToName]]  
ISSUED TO ADDRESS: [[IssuedToAddress]] [[IssuedToCity]], [[State]] [[IssuedToZip]]  
DESCRIPTION OF WORK: [[Description]]  
COMMENTS: [[Comments]]

[[#end:letter]]

[[#end:letter]]

# How to Format an RTF Form

- Inserting a Table (charges)

**CITY OF SUMMERSVILLE**  
**OFFICE OF BUILDING INSPECTIONS**  
2000 SUNSHINE LANE • TUCSON, AZ 85472 • PHONE (414) 2222 - 3333

[[PermitDescription]]  
[[PermitNumber]]

ISSUE DATE: [[IssueDate]] EXPIRATION DATE: [[ExpirationDate]]

PARCEL NUMBER: [[ParcelNumber]]  
PROPERTY ADDRESS: [[CentralServiceAddress]] [[City]], [[StateVal]] [[Zip]]  
PROPERTY OWNER NAME: [[PrimaryOwner]]

ISSUED TO NAME: [[IssuedToName]]  
ISSUED TO ADDRESS: [[IssuedToAddress]] [[IssuedToCity]], [[State]] [[IssuedToZip]]  
DESCRIPTION OF WORK: [[Description]]  
COMMENTS: [[Comments]]

[[insert:AllPermitCharges]]

[[#start:AllPermitCharges]]  
[[ChargeDescription:Charge Description:80:left]]  
[[PermitCharge:Charge:20:right]]  
[[#end:AllPermitCharges]]

[[#start:AllPermitCharges]]  
[[ChargeDescription:Charge Description:80:left]]  
[[PermitCharge:Charge:20:right]]  
[[#end:AllPermitCharges]]

# How to Format an RTF Form

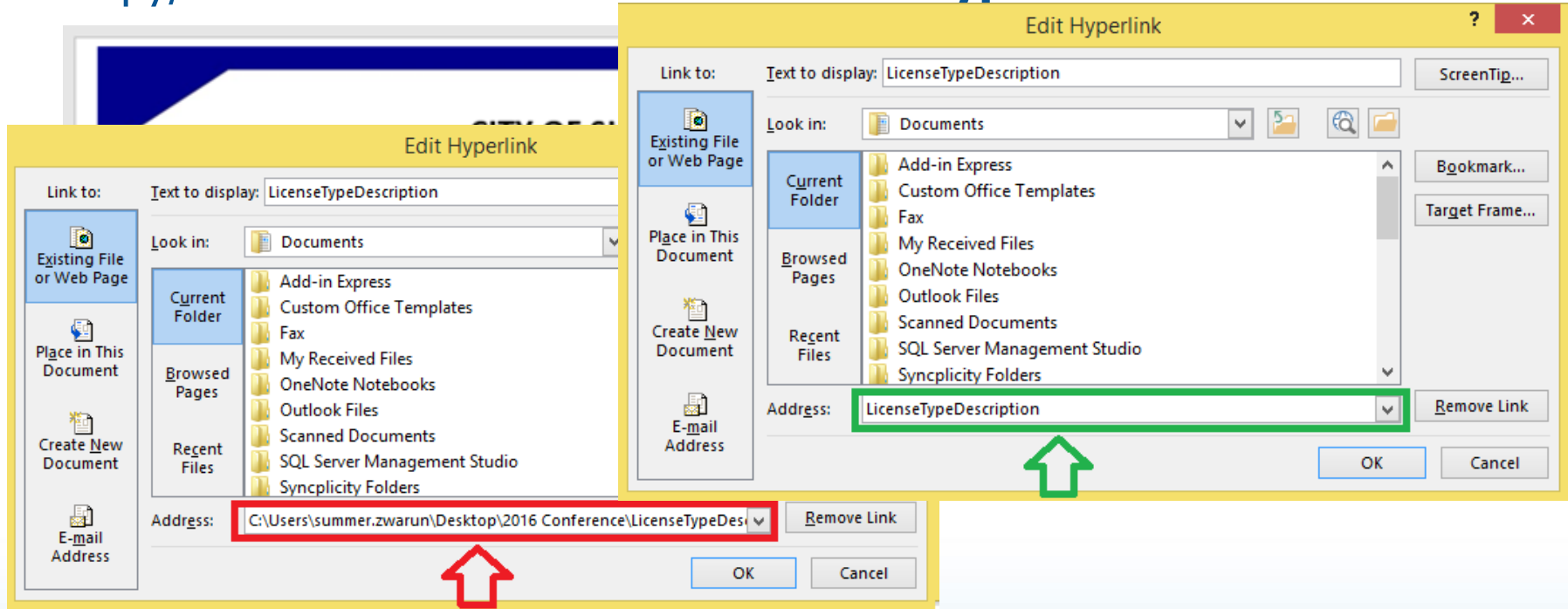


Permit Form  
Permit Form Letters



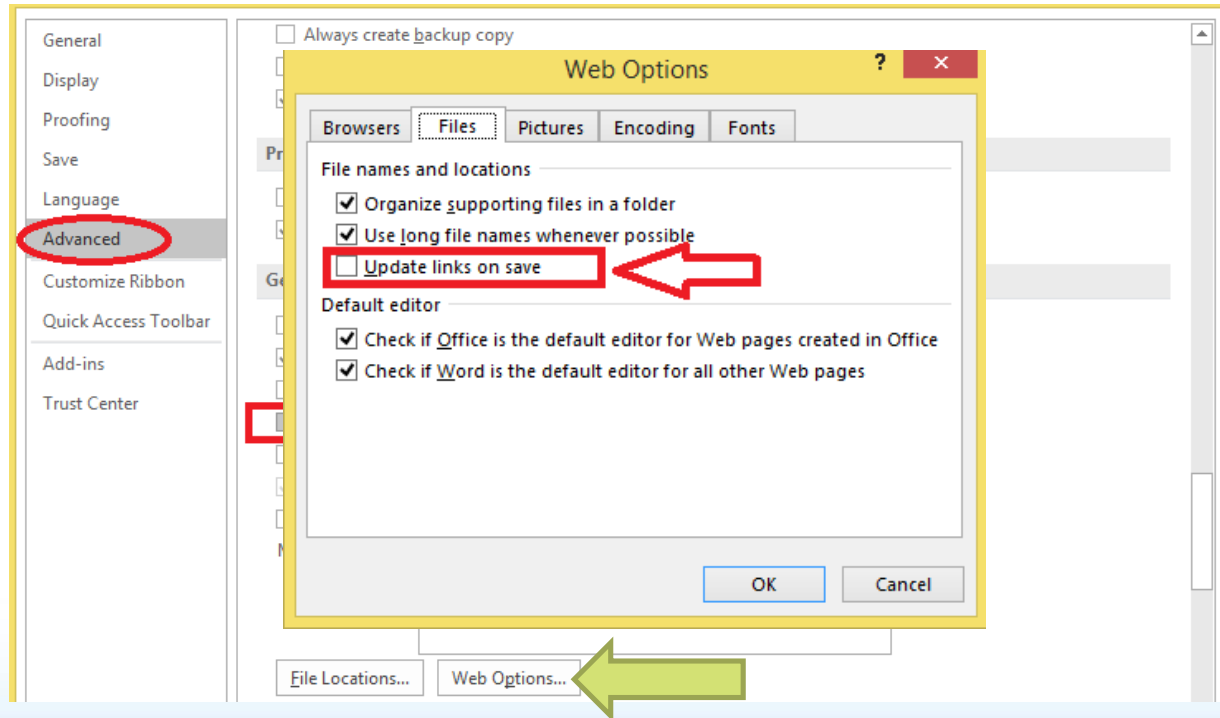
# How to Format an XML Form

- Copy/Paste Links but MUST “scrub” the hyperlink



# How to Format an XML Form

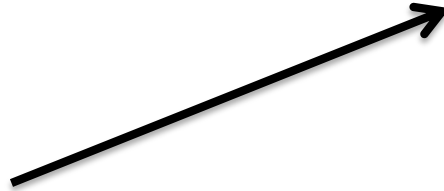
- 2 Microsoft Word Settings



- 1) Update auto links at open
- 2) Update links on save

# How to Format an XML Form

License Form  
License Renewal Form  
License Delinquent Notice  
Case Form Letters





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# Permit Form vs. License Form

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# Mail Merge: Permit Form vs. License Form

- Select "Mail Merge Type" dropdown

## Mail Merge Templates

Mail Merge Types

Status	Description
	Inspectors Worksheet
	Inventory Issue Ticket
	License Application
	License Delinquent Notice
	License Form
	License Renewal
	Licensee Form Letter
	Licensing Expiration Date Letter
	MB Delinquent Notice Form Letter
	MB Invoice Form Letter
	MB Invoice Reprint Form Letter
	Parcel Form Letter
	Permit
	Permit Application Approval Letter
	Permit Application Checklist
	Permit Application Rejection Letter
	Permit Final Certificate of Completion Letter
	Permit Form Letter
	Permit Temporary Certificate of Completion
	Sample Templates
	Special Assessments Customer Statement
	Special Assessments Delinquent Invoice Notice

View Options

Template	Date Created	Changed By	Date Changed	Checked Out By	Date Checked Out
vs	8/14/2014 9:14:54 AM				
vs	1/27/2014 3:50:00 PM				
vs	1/16/2014 9:29:57 AM				
vs	10/28/2013 1:17:52 PM				
vs	9/17/2013 8:41:11 AM				
vs	8/9/2013 2:00:00 PM				
vs	5/8/2013 8:38:06 AM				
vs	2/20/2013 10:18:30 AM				
vs	1/21/2013 11:41:27 AM				
vs	1/21/2013 11:41:27 AM				
vs	12/20/2012 1:20:05 PM				
vs	11/14/2012 10:45:00 AM				

Finalize Check In Undo Check Out



# Mail Merge: Permit Form

- Step 1: Click **New**

## Mail Merge Templates

Mail Merge Types

Status	Description	File Type
	Permit No Driveway No Water 03232016	rtf
	Permit 3/10/16	rtf
	Permit Deck 10/22/15	rtf
	Permit 10/22/15	rtf
	Permit 10-16-15	rtf
	Permit 10/8/15	rtf
	Permit No Water No Driveway 10/8/15	rtf
	Permit Deck 10/8/15	rtf
	Permit Deck 6/24/15	rtf
	Permit No Water No Driveway 6/24/15	rtf
	Permit 6/23/15	rtf

**new world ERP -- Webpage Dialog**

**Upload document**

File Type

Description

File

- RTF
- Name Form
- Select File

# Mail Merge: Permit Form

- Step 2: Click **Check In**

## Mail Merge Templates

Mail Merge Types | Permit

Status	Description	File	Date Changed	Check
✓	Permit Form	rtf		nws
🔒	Permit No Driveway No Water 03232016	rtf		
🔒	Permit 3/10/16	rtf		
🔒	Permit Deck 10/22/15	rtf		
🔒	Permit 10/22/15	rtf		
🔒	Permit 10-16-15	rtf		
🔒	Permit 10/8/15	rtf		
🔒	Permit No Water No Driveway 10/8/15	rtf		
🔒	Permit Deck 10/8/15	rtf		
🔒	Permit Deck 6/24/15	rtf		
🔒	Permit No Water No Driveway 6/24/15	rtf		

new world ERP -- Webpage Dialog

**Upload document**

File Type: rtf - Rich Text Format

Description: Permit Form

File: QYW00OYD.rtf


# Mail Merge: Permit Form

- Step 3: Click **Finalize**

## Mail Merge Templates

Mail Merge Types

Permit



Status	Description	File Type	Created By	Date Created	Changed By	Date Changed	Checked Out
	Permit Form	rtf	nws	9/23/2016 4:51:56 AM	nws		
	Permit No Driveway No Water 03232016	rtf	nws	3/23/2016 11:47:02 AM	nws		
	Permit 3/10/16	rtf	nws	3/10/2016 2:28:19 PM	nws		
	Permit Deck 10/22/15	rtf	nws	10/22/2015 7:42:33 AM	nws		
	Permit 10/22/15	rtf	nws	10/22/2015 6:57:13 AM	nws		
	Permit 10-16-15	rtf	nws	10/19/2015 5:07:53 PM	nws		
	Permit 10/8/15	rtf	BEST44	10/9/2015 3:00:44 PM	BEST44		
	Permit No Water No Driveway 10/8/15	rtf	BEST44	10/9/2015 3:00:06 PM	BEST44		
	Permit Deck 10/8/15	rtf	BEST44	10/9/2015 2:59:43 PM	BEST44		
	Permit Deck 6/24/15	rtf	nws	6/23/2015 5:41:39 PM	nws		
	Permit No Water No Driveway 6/24/15	rtf	nws	6/23/2015 5:37:14 PM	nws		

View

Open

New

Delete

Detail

Permissions

Finalize

Check In

Undo Check Out

# Mail Merge: Permit Form

- Step 4: Click **Permissions**

myFavorites | Financial Management

### Mail Merge Templates

Mail Merge Types:

Status	Description
	Permit Form
	Permit No Driveway No Water 032320
	Permit 3/10/16
	Permit Deck 10/22/15
	Permit 10/22/15
	Permit 10-16-15
	Permit 10/8/15
	Permit No Water No Driveway 10/8/15
	Permit Deck 10/8/15
	Permit Deck 6/24/15
	Permit No Water No Driveway 6/24/15

### Document Permissions

Document ID: QYW000YD

User Login	Change	Delete	View	Print	Undo Check-Out	Finalize
ALPINE LOCK & KEY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ANIMAL CARE EQUIPMEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ANIMAL HEALTH & SANI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ANIMAL OUTPATIENT CA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APEX SAW WORKS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASPEN ENGINEERING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSET INSIGHT TECHNO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSOCIATED BAG COMPA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSURANT EMPLOYEE BE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

View Open New Delete Detail **Permissions** Finalize Check In Undo Check Out

- View
- Print

# Mail Merge: License Form

- Follow the **SAME 4 STEPS** as a Permit **EXCEPT STEP 1 .....**

## Mail Merge Templates

Mail Merge Types License Form

Status	Description	File Type	Created	Checked Out By
--------	-------------	-----------	---------	----------------

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**Upload document**

File Type

Description

File

**Select XML !!**



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# Permit Form vs. License Form

... Using the Mail Merge Output

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# Permit vs License: Using Mail Merge Output

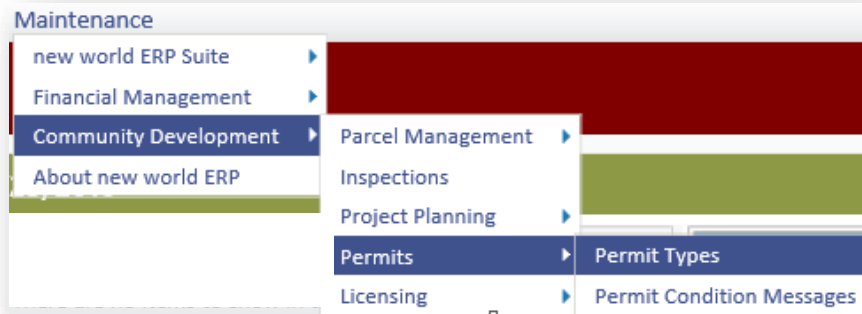
“... I just spent all that time and NOW I can't even SEE MY FORMS?! ”



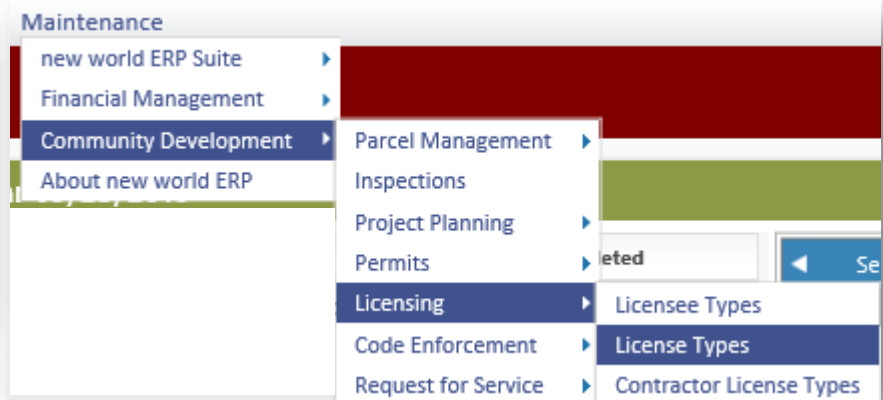
# Permit vs License: Using Mail Merge Output

- **ATTACH** the Permit/License Form to its **MAINTENANCE TYPE**

## Permit Form to Permit Type



## License Form to License Type





# Permit: Using Mail Merge Output

- Step 4 Permissions = the right to **ATTACH Permit Output Format**

Permit Type List

Permit Type - C - Addition, Commercial Addition

Attribute **General**

General

Code **C - Addition**

Description **Commercial Addition**

eSuite Description

Active ☒

Category **C - Commercial**

Master Permit Type ☒

Allow Manual Entry of Permit Number ☐

Counter Group **Permit**

Issue Temporary Certificate of Completion ☒

Issue Final Certificate of Completion ☒

Allow Inspector to Complete Permit with Final Inspection ☐

Default Days to Expire Permit **720**

Extend Based on Permit Activity ☐

Enforce Inspection Dependencies **Do Not Check**

Save

Save/New

Delete

Reset

Application

Application Required

Number Separately from Permit

Allow Manual Entry of Application Number

Issue Application Approval Form ☐

Forms

Application Approved Format

Application Denied Format

Permit Output Type **Mail Merge**

Permit Output Format **Permit Form**

Use Barcoded Permit Form ☐

Payment Code

Temporary Certificate of Completion Format **Comm Temp C of O**

Final Certificate of Completion Format **Comm Final C of O**

Permit Output Type **Mail Merge**

Permit Output Format **Permit Form**

# License: Using Mail Merge Output

- Without Permissions a User **Can't** use the Merged Form

Permit Type List  
Permit Type - C - Addition, Commercial Addition

Attribute General

**The following errors have occurred:**

- User needs a permission to use specific Mail Merge Form.

**General**

Code C - Addition

Description Commercial Addition

eSuite Description

**Application**

Application Requires

Number Separately from Permi

Allow Manual Entry of Application Number

**Permit Output Type** Mail Merge

**Permit Output Format**

**The following errors have occurred:**

- User needs a permission to use specific Mail Merge Form.

Counter Group Permit

Issue Temporary Certificate of Completion ☒

Issue Final Certificate of Completion ☒

Allow Inspector to Complete Permit with Final Inspection ☐

Default Days to Expire Permit 720

Extend Based on Permit Activity ☐

Permit Output Type Mail Merge

Permit Output Format

Use Barcoded Permit Form ☐

Payment Code

Temporary Certificate of Completion Format Comm Temp C of O

Final Certificate of Completion Format Comm Final C of O

# License: Using Mail Merge Output

- Step 4 Permissions = the right to ATTACH **License Output form**

License Type List

License Type - Contractor, CONTRACTOR LICENSE

Attribute **General**

## General

Active ☒

Category **Business**

Code **Contractor**

Description **CONTRACTOR LICENSE**

Renewable ☒

Allow Cashier Maintenance ☒

Formal Application Required ☐

Enforce Inspection Dependencies **Do Not Check**

Next License Number **1,001**

Issue Licenses with Balance Due ☐

Issue Pre-Numbered Tags ☐

## Revenue Collections

Print Barcode ☐

Payment Code

**Save** **Save/New** **Delete** **Reset**

## Formats

Output Type

Form Name

License **Mail Merge**

**License Form**

Application **Mail Merge**

Renewal **Form**

**Standard - Standard**

Delinquent Notice **Form**

**Standard - Standard**

License

**Mail Merge**

**License Form**



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# License: Using Mail Merge Output

- Without Permissions a User **Can't** use the Merged Form

License Type List

License Type - Contractor, CONTRACTOR LICENSE

Attribute General

The following errors have occurred:

- User needs a permission to use specific Mail Merge Form.

General

Formats

Active ☒

Output Type

Form Name

Category Business

License Mail Merge

The following errors have occurred:

- User needs a permission to use specific Mail Merge Form.

License

Mail Merge

Allow Cashier Maintenance ☒

Formal Application Required ☐

Next License Number 1,001

Issue Licenses with Balance Due ☐

Issue Pre-Numbered Tags ☐



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# Permit Form Letter vs. Case Form Letter

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# Mail Merge: Permit Form Letter vs Case Form Letter

- Select "Mail Merge Type" dropdown

**Mail Merge Templates**

Case Form Letter

Status	Description
	COBRA Election Notice
	COBRA Initial Notice
	COBRA Other
	Licensee Form Letter
	Licensing Expiration Date Letter
	MB Delinquent Notice Form Letter
	MB Invoice Form Letter
	MB Invoice Reprint Form Letter
	Parcel Form Letter
	Permit
	Permit Application Approval Letter
	Permit Application Checklist
	Permit Application Rejection Letter
	Permit Final Certificate of Completion Letter
	Permit Form Letter
	Permit Temporary Certificate of Completion
	Sample Templates
	Special Assessments Customer Statement

View

Date Created	Changed By	Date Changed	Checked Out By	Date Checked Out
8/14/2014 9:14:54 AM				
1/27/2014 3:50:00 PM				
1/16/2014 9:29:57 AM				
10/28/2013 1:17:52 PM				
9/17/2013 8:41:11 AM				
8/9/2013 2:00:00 PM				
5/8/2013 8:38:06 AM				
2/20/2013 10:18:30 AM				
1/21/2013 11:41:27 AM				
1/21/2013 11:41:27 AM				
12/20/2012 1:20:05 PM				
11/14/2012 10:45:00 AM				

Finalize Check In Undo Check Out

# Mail Merge: Permit Form Letter vs Case Form Letter

- Follow same 4 STEPS to merge document into system

Mail Merge Templates

Mail Merge Types

Status	Description	File Type	Created By	Date Created	Changed By	Date Changed
	Sample Permit Form	rtf	nws	9/23/2016 5:49:46 AM	nws	
	M/E/P Inspection 5-11-16	rtf	ALPINE14	5/11/2016 9:49:26 AM	ALPINE14	
	Residential/Remodel/Addition 5-11-16	rtf	ALPINE14	5/11/2016 9:41:11 AM	ALPINE14	
	Deck Inspection 5-11-16	rtf	ALPINE14	5/11/2016 9:37:42 AM	ALPINE14	
	M/E/P Inspection 5-11-16	rtf	ALPINE14	5/11/2016 9:33:21 AM	ALPINE14	
	Commercial Inspection 5-11-16	rtf	ALPINE14	5/11/2016 9:20:57 AM	ALPINE14	
	M/E/P Inspection 5-11-16	rtf	ALPINE14	5/11/2016 8:23:44 AM	ALPINE14	
	Window Changeout / Reside	rtf	BEST44	4/21/2016 4:32:22 PM	BEST44	
	Permit Correction	rtf	BEST44	4/21/2016 4:14:54 PM	BEST44	
	Permit App - FULL (APP STATUS) 03/22/16	rtf	nws	3/22/2016 8:14:38 AM	nws	
	Permit App - Partial (APP STATUS) 03/22/16	rtf	nws	3/22/2016 8:53:50 AM	nws	

1 4 3 2

View Open **New** Delete Detail **Permissions** **Finalize** **Check In** Undo Check Out

- **Step 1: Select File Type RTF**

Mail Merge Types Permit Form Letter

**Select RTF!!**



# Mail Merge: Case Form Letter

- **Step 1: Select File Type XML**

Mail Merge Templates

Mail Merge Types Case Form Letter

Status	Description	File Type
	1st Notice - General 2016	xml
	2nd Notice - Red Tag 5/19/15	xml
	2nd Notice - Red Tag 5/19/15	xml
	2nd Notice-Red Tag 4/13/2015	xml
	1st Notice-Red Tag 4/13/15	xml
	Notice of Non-Compliance	xml
	Notice and Order	xml
	Compliance Agreement	xml
	1st Notice - General	xml
	2nd Notice - General	xml
	1st Notice - Red Tag	xml

new world ERP -- Webpage Dialog

Upload document

File Type xml - XML file

Description Case Form Letter

File C:\Users\summer.zwarun\De Browse...

OK Cancel

Select XML !!

View Open **New** Delete Detail Permissions Finalize Check In Undo Check Out

# Mail Merge: Permit Form Letter vs Case Form Letter

- **Step 4: Select ALL Users** (to use the form)

Mail Merge Templates

Mail Merge Types: Permit Form Letter

Status	Description
	Sample Permit Form
	M/E/P Inspection 5-11-16
	Residential/Remodel/Addition
	Deck Inspection 5-11-16
	M/E/P Inspection 5-11-16
	Commercial Inspection 5-11-16
	M/E/P Inspection 5-11-16
	Window Changeout / Reside
	Permit Corrections
	Permit App - FULL (APP STATU
	Permit App - Partial (APP STATU

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Document Permissions

Document ID: QYW000YF

User Login	Change	Delete	View	Print	Undo Check-Out	Finalize
ALPINE LOCK & KEY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ANIMAL CARE EQUIPMEN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ANIMAL HEALTH & SANI	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ANIMAL OUTPATIENT CA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APEX SAW WORKS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASPEN ENGINEERING	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSET INSIGHT TECHNO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSOCIATED BAG COMPA	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSURANT EMPLOYEE BE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

View Open New Delete Detail **Permissions** Finalize Check In Undo Check Out

- View
- Print



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# Permit Form Letter vs. Case Form Letter

... Using the Mail Merge Output

Empowering people who serve the public®



# Permit Letter: Using Mail Merge Output

- Step 4 Permissions = Users the right to **View/Print** the Letter

Permit Service  
Permit - C - Addition - 2003-00015753

General

Permit C - Addition - 2003-00015753

Parcel J1 18-610-26-000

Service Address 11464 DONNER PASS RD  
Troy, MI 48085

Parcel Owner MOONEY PATRICK & MEARA ET

Permit Issued To ☐ Parcel Owner ☒ Contractor

**Contractor Information**

Contractor UNIVERSAL ENVIRONMENTAL, INC.  
UNIVERSAL ENVIRONME  
4101 INDUSTRIAL WAY  
Contractor Contact BENICIA, CA  
Troy, MI 48084

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**Print Permit - 2003-00015753**

Form to Print Print Permit Form Letter

Form Letter Sample Permit Form

OK Cancel

Form to Print Print Permit Form Letter

Form Letter Sample Permit Form

# Case Letter: Using Mail Merge Output

- Step 4 Permissions = Users the right to **View/Print** the Letter

Case Service

Case - Property Maint 2016-00000058

General

Case Description RV being used as living s

Case Location 10630 HEATHER RD  
Troy, MI 48084

Case Source Internal

Case Opened Date 5/10/2016

Active ☒

Resolution Date

Resolution Reason

Principal Case Type

Principal Case Number

Description RV being used as li

Assigned to Inspector Taber, Kerry

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Print Case Form Letter

Form Letter Case Form Letter

Form Letter Text

OK Cancel

Form Letter Case Form Letter

# Permit vs Case Letter: Using Mail Merge Output

**(Happy Users Pictured Below)**





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# Thank You!!!

Summer Zwarun – Application Specialist  
Zuew Kue – Customer Support Team Lead

Tuesday, October 4<sup>th</sup> 2016

