

Using mailmerge

A working example of why we use the mail merge facility

This example is based on cancelling a day of patients

I would suggest that you have letters in the mail merge section for cancelling patients or other letters to use already. If not you can make these by referring to 'creating mail merge letters' instructions.

1. Go to the day that you would like to cancel in the appointment book.
2. Go to the dentist's daylist for that day by clicking on the magnifying glass at the dentists name (note that you must be in browse view to be able to do this).
3. At the bottom of the page there is button '**MARK**' please click this to automatically mark all patients in the daylist. You will now see that each patient has a small 'm' beside there name. If you are cancelling this whole day of patients please go straight to step 5.
4. If you just want to mark certain patients for that particular day and you have marked all patients you have to click on the '**m**' manually for each patient you do not want to send a letter to and this will 'unmark' the ones you do not want to contact.
5. Beside the '**MARK**' button there is a '**CONTACT**' button, click this
6. You will now have your list of marked patients
7. At the top left hand corner of the page there is a '**MAIL MERGE THIS GROUP**', click on this option
8. You should have a cancellation letter. If not then you can create this using the 'create mail merge letter instuctions' as suggested above.
9. '**SELECT**' your cancellation letter
10. Check the letter is what you want and amend dates etc as relevant.
11. Now click '**USE**'
12. You want to '**IGNORE APPT BOOK**'. If it does not read this then you should click on this button until it does read '**IGNORE APPT BOOK**'. This means it will ignore the fact that the patient has an appointment as you are wanting to cancel it anyway.
13. Now click '**DAE IT**' providing your letter is exactly the way you want it,

remember you can check this by looking at your preview

14. Click the '**CONTINUE**' button then print the letters

15. You can also use the mail merge for your hygienist recalls, there are separate instructions for this.