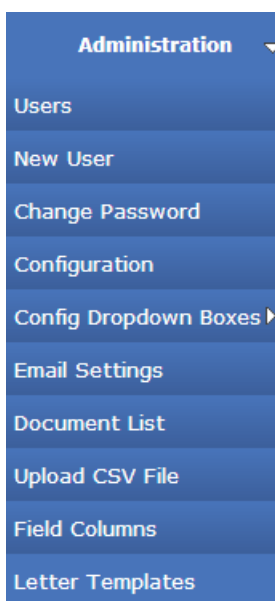


Claim Ruler Software - Mail Merge Instructions

1. Login to your portal and click on the **Administration** menu.

The process used to import your company's letter(s) into Claim Ruler software is called "**Mail Merge**" and requires Microsoft Word software. *If you do not have Microsoft Word or require additional support, then please contact IT Strategies Group Technical Support at crsupport@itstrategiesgroup.com and they will assist you further. This additional service may be complementary or require additional billing depending on your support license and hours used.*




2. Click on **Letter Templates**.

The following screen appears.

Letter Templates

[Download MailMerge Fields](#)

[New Template](#)

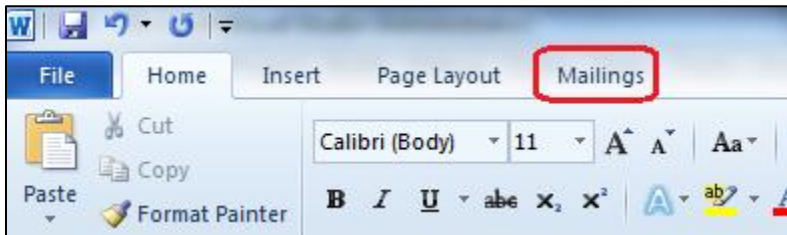
Template File Name	Template Description	
Letter of Representation.doc	Representation Letter	 

3. Click on **Download MailMerge Fields**.

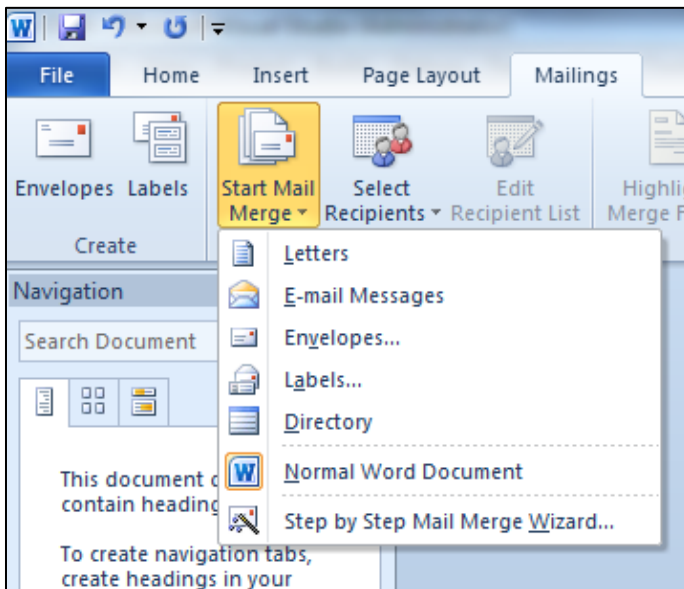
You will be prompted to save a file named CRMFields.xlsx on your computer. This file must be opened in Excel or Google Docs Excel and contains all of the "fields" that you can have auto-filled in your letter(s) by Claim Ruler software.

Example: POLICY NO

4. Start Microsoft Word.
5. Open your Company's Letter(s) that you want to import into Claim Ruler. This must be in Microsoft Word(.DOC or .DOCX format).
6. Select **Mailings** on top menu in Microsoft Word.

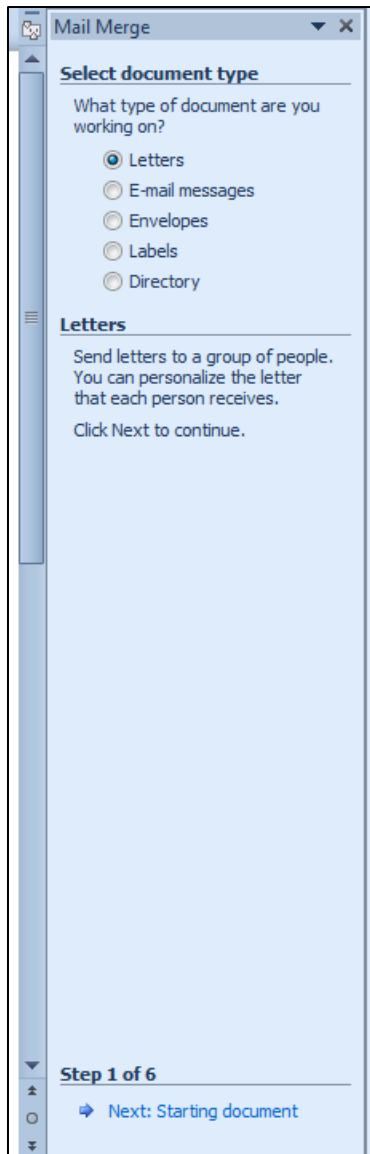


7. Click **Start Mail Merge**.



8. Select **Step by Step Mail Merge Wizard**.

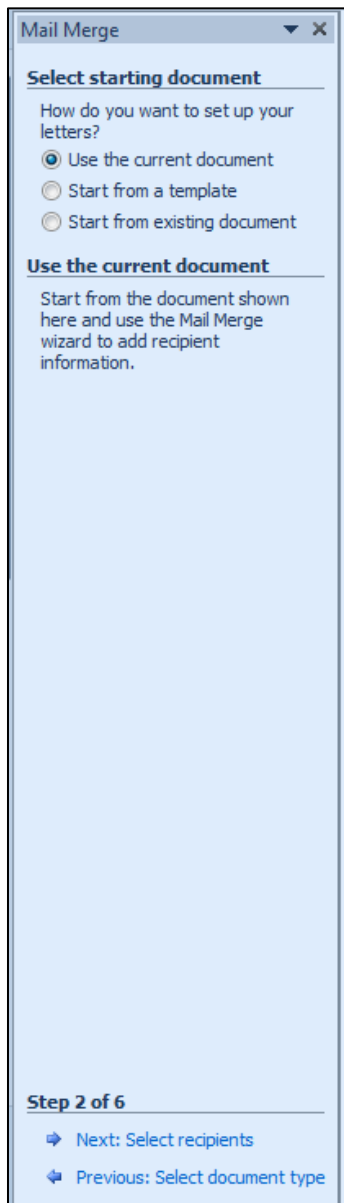
The following screen appears:



9. Click on **Letters** under Select document type.

10. Click on **Next Starting document**.

The following screen appears.



The image shows a 'Mail Merge' dialog box with a title bar containing a dropdown arrow and a close button. The main content area is light blue and contains the following text:

Select starting document

How do you want to set up your letters?

- ☒ Use the current document
- ☐ Start from a template
- ☐ Start from existing document

Use the current document

Start from the document shown here and use the Mail Merge wizard to add recipient information.

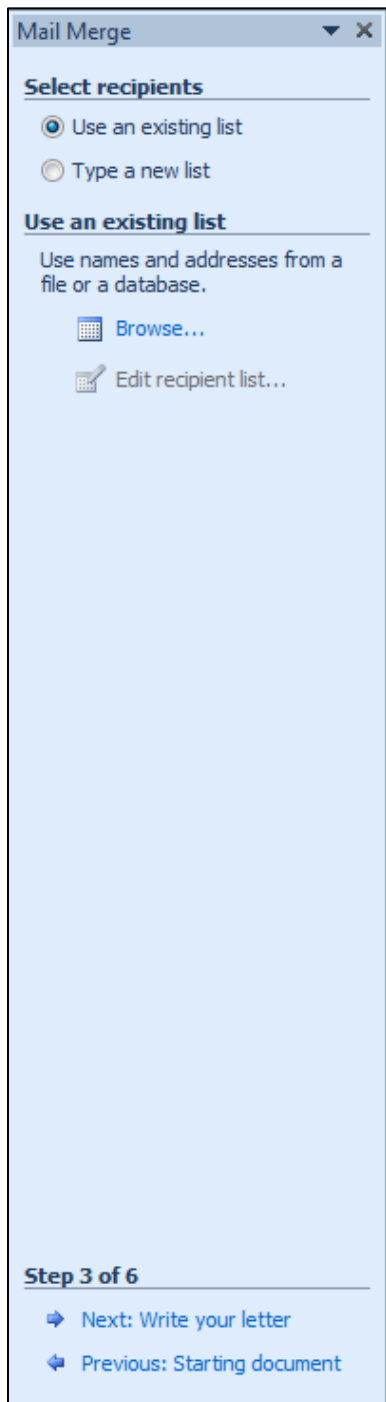
Step 2 of 6

➡ Next: Select recipients

⬅ Previous: Select document type

11. Click on **Next: Select recipients.**

The following screen appears:



The image shows a 'Mail Merge' dialog box with a title bar containing a dropdown arrow and a close button. The main area is titled 'Select recipients' and contains two radio buttons: 'Use an existing list' (selected) and 'Type a new list'. Below this is a section titled 'Use an existing list' with the instruction 'Use names and addresses from a file or a database.' and two buttons: 'Browse...' and 'Edit recipient list...'. At the bottom, a 'Step 3 of 6' section shows navigation links: 'Next: Write your letter' and 'Previous: Starting document'.

Mail Merge


Select recipients


☒ Use an existing list

☐ Type a new list

Use an existing list

Use names and addresses from a file or a database.

 Browse...

 Edit recipient list...

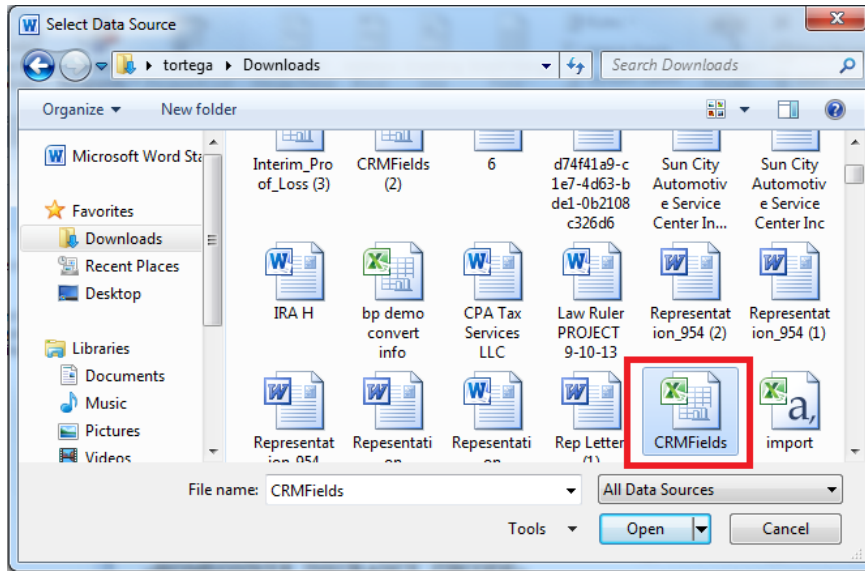
Step 3 of 6

➡ Next: Write your letter

⬅ Previous: Starting document

12. Click on **Browse...**

The following screen appears:

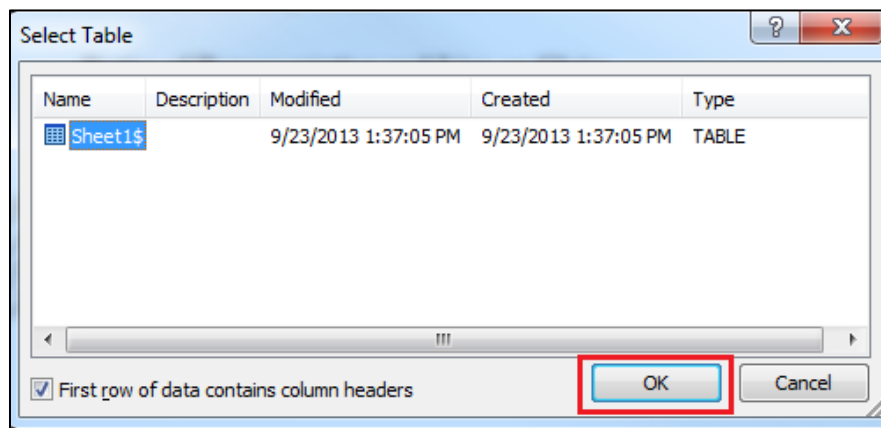


13. Find file containing mail merge fields you downloaded to your computer earlier.

CRMFields.XLSX

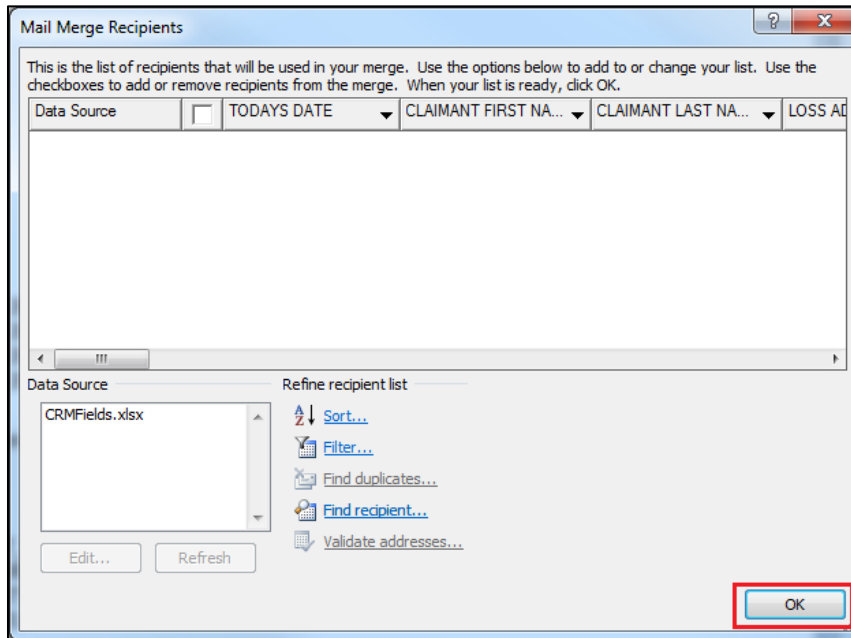
14. Click **Open**.

The following pop-up screen appears:



15. Click on the **OK** button.

The following screen appears:



16. Click on the **OK** button.

17. Move the cursor to the location within the document where mail merge fields will be inserted.

ABC ADJUSTERS INC
17208 Panama City Beach Pkwy.
Panama City Beach Florida 5699

Notice of Representation and Lien on Claim

«HOMEOWNER_INSURANCE_CO»
«HOMEONWER_INSURANCE_ADDRESS»«HOMEONWER_INSURANCE_ADDRESS2»
«HOMEONWER_INSURANCE_CITY», «HOMEONWER_INSURANCE_STATE»
«HOMEONWER_INSURANCE_ZIPCODE»

Insurance Company Contact:

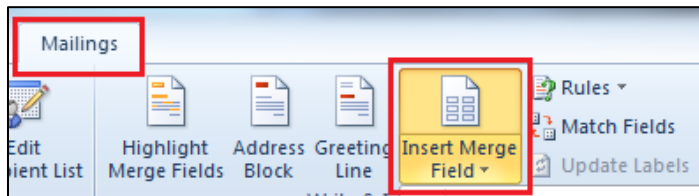
Re: «CLAIMANT_FIRST_NAME» «CLAIMANT_LAST_NAME»
«LOSS_ADDRESS» «LOSS_ADDRESS2»
«OFFICE_CITY», «OFFICE_STATE» «OFFICE_ZIPCODE»
«LOSS_DATE»

Insurance Co: «HOMEOWNER_INSURANCE_CO»
Policy #: «HOMEOWNER_POLICY_NO»
Claim #: «HOMEOWNER_CLAIM_NUMBER»

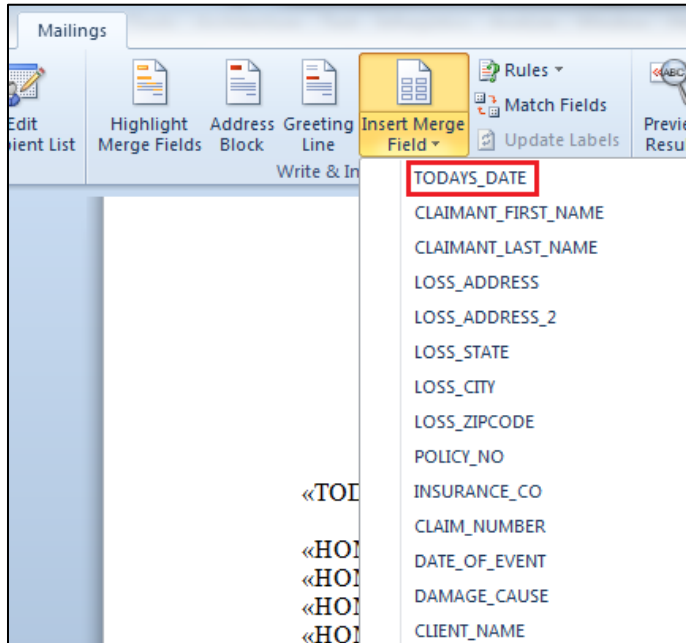
Please be advised that we represent the above named client with regard to damages and claim arising from Superstorm Sandy. Attached is a copy of our Contract For Services.

Please be advised that Claims Strategies Group has a lien to the extent of its fees on all proceeds and agreement with the client that it be named as a party on all payments.
The correct title of the company to be named is: **Claim Ruler Example Public Adjuster**

18. Click on **Insert Merge Field**.



The following list appears: We will use **TODAYS_DATE** as an example.



19. Click on **TODAYS_DATE** to insert field.

Your screen should look as follows:

ABC ADJUSTERS INC
17208 Panama City Beach Pkwy.
Panama City Beach Florida 5699

Notice of Representation and Lien on Claim

«TODAYS_DATE»

«HOMEOWNER_INSURANCE_CO»
«HOMEONWER_INSURANCE_ADDRESS»«HOMEONWER_INSURANCE_ADDRESS2»
«HOMEONWER_INSURANCE_CITY», «HOMEONWER_INSURANCE_STATE»
«HOMEONWER_INSURANCE_ZIPCODE»

Insurance Company Contact:

Re: «CLAIMANT_FIRST_NAME» «CLAIMANT_LAST_NAME»
«LOSS_ADDRESS» «LOSS_ADDRESS2»
«OFFICE_CITY», «OFFICE_STATE» «OFFICE_ZIPCODE»
«LOSS_DATE»

Insurance Co: «HOMEOWNER_INSURANCE_CO»
Policy #: «HOMEOWNER_POLICY_NO»
Claim #: «HOMEOWNER_CLAIM_NUMBER»

Please be advised that we represent the above named client with regard to damages and claim arising from Superstorm Sandy. Attached is a copy of our Contract For Services.

Please be advised that Claims Strategies Group has a lien to the extent of its fees on all proceeds and agreement with the client that it be named as a party on all payments.
The correct title of the company to be named is: **Claim Ruler Example Public Adjuster**

20. Repeat steps 18 and 19 for each field you wish to insert into this letter.
21. Save document.
22. Login to Claim Ruler.
23. Click on **Administration**.
24. Select **Letter Templates**.
25. Click on **New Template** button.

The screenshot shows the 'Letter Templates' section of the Claim Ruler software. At the top, there is a navigation bar with links: Home, My Business, Letters, Administration, and Help. Below the navigation bar, the title 'Letter Templates' is displayed. A link 'Download MailMerge Fields' is visible. A table lists existing templates, with one entry: 'Letter of Representation.doc' with the description 'Representation Letter'. To the right of the table, a 'New Template' button is highlighted with a red rectangular box.

Template File Name	Template Description
Letter of Representation.doc	Representation Letter

26. Enter description for new template.

The screenshot shows the 'Edit Letter Template' page. It features a form with two main sections. The first section, 'Template Description', has a text input field that is highlighted with a red rectangular box. The second section, 'Template File Name', includes a 'Choose File' button and the text 'No file chosen'. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

27. Click on **Choose File** button to select your newly merged document.

This screenshot is identical to the previous one, showing the 'Edit Letter Template' page. In this instance, the 'Choose File' button in the 'Template File Name' section is highlighted with a red rectangular box.

28. Click **Save**. Your letter is now imported into Claim Ruler software and you can begin using the letter via e-mail or print it out to physically mail to the recipient. Thanks for using Claim Ruler Software.