

Custom Reporting Mail Merge Feature

Overview

The **Mail Merge** feature in [Custom Reporting](#) allows you to generate individualized documents for each row of data returned by a custom report. By creating a DOCX template with mail merge fields, CMPOnline can automatically populate the template with information from your custom report. To set up a mail merge, it is recommended that you have **two browser tabs** open: one for your Custom Report and one for your Document Template.

Execute Your Custom Report

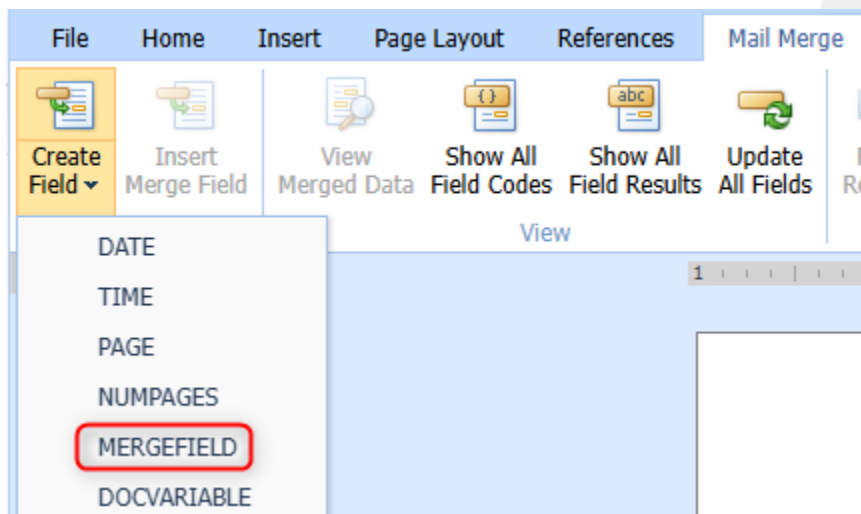
Navigate to **Tools > Custom Reporting**.

- “**Execute**” the custom report you want to use for the mail merge
- Keep this report open in one browser tab.
 - You will need the field names from the report when creating your document template.

Create the Document Template

In a second browser tab, navigate to **Administration > Setup > Document Templates**.

- Click “**Create New DOCX**”.
- Build your document template as needed.
- To insert a mail merge field, select “**Mail Merge**” from the top menu.
- Click “**Create Field**” and select “**Merge Field**”.



- A merge field will be inserted into the document.
- Inside the quotation marks, enter the exact field name from your executed custom report.

`{MERGEFIELD "File Number"}`

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- Continue adding mail merge fields as needed, using the field names available in your custom report.

Note: The field names used in the document template must match the field names from the Custom Report. If a field is not named correctly, CMPOnline may not populate the information as expected.

- Once you have finished creating your document, save the template in a designated folder, such as “Mail Merges”, or another location that works for your firm.

Running the Mail Merge

CMPOnline will generate a separate document for each row returned by the custom report, using the mail merge fields included in your template.

- Return to the browser tab containing your custom report.
- Re-execute the report.
- Locate and select the document template you created.
- Click “Merge”.

_Closed Cases by Closure Reason

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File Number	Closure Reason	Closure Date	Status Code
1	Opponent Deceased/nothing to pursue	03/18/2021	CLOS
1	Bad Credit/Uncollectable	05/12/2021	CLOS
1	Other	03/14/2022	CLOS
3	Debt too small to pursue	10/07/2022	CLOS
1	Other	06/18/2025	CLOS
1	Other	04/15/2026	CLOS
1	Settled as agreed	07/27/2026	CLOS

Showing 1 to 7 of 7 entries

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Mail Merge Template:
~\Help Doc Test 20260817.docx
Merge

Generate Chart
☐ Show Grand Total?

Questions?

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