Using the Mailing Wizard in Trialworks

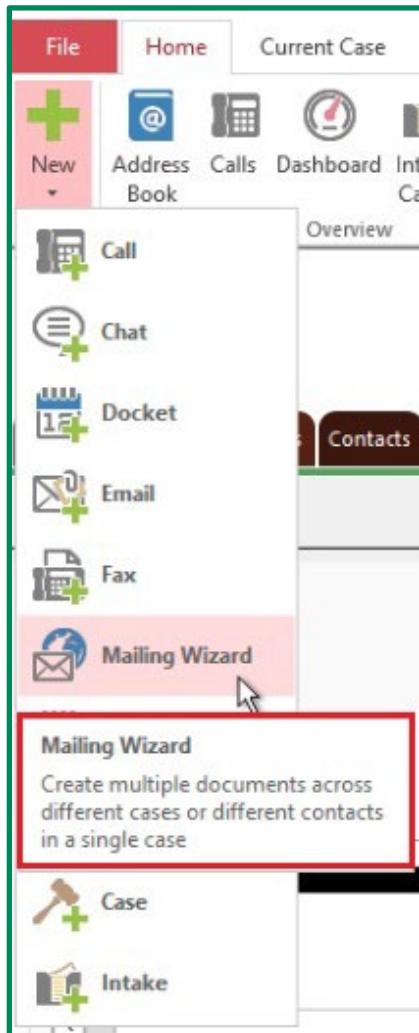The Mailing Wizard simplifies the process of generating and sending the same document to multiple people. There are many applications for this feature such as sending holiday cards, printing envelopes, or requesting medical records from multiple providers.
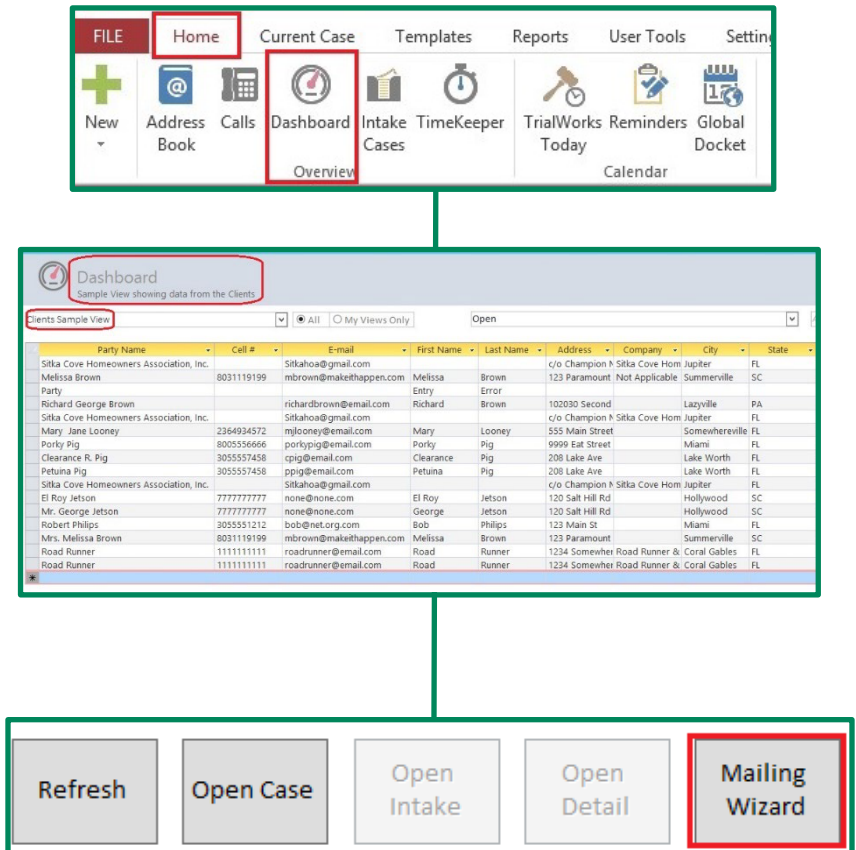
Mailing Wizard

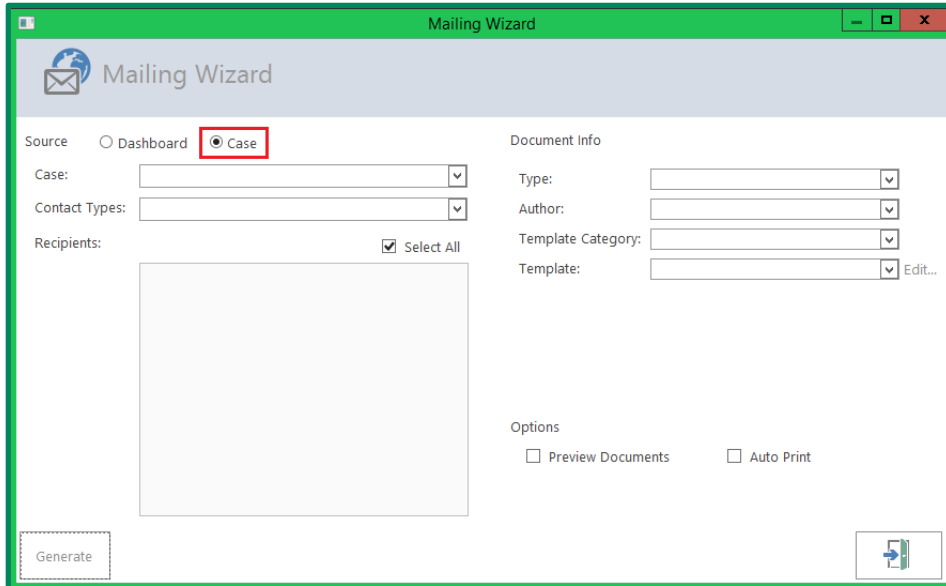May be launched from the **New** button (New > Mailing Wizard) and from the **Dashboard**.

New > Mailing Wizard: Dashboard > Mailing Wizard:
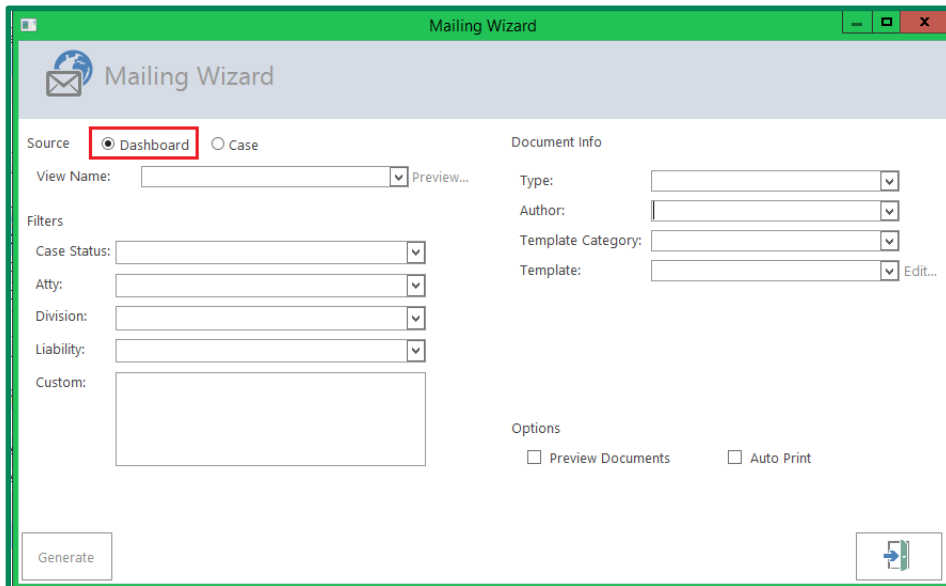
Both take the user to a Mailing Wizard form, where Case or Dashboard may be selected as the Source.

The Mailing Wizard enables the user to create multiple documents across different cases or different contacts in a single case. The benefit of using the Mailing Wizard from the Dashboard is that it enables the user to create templates for *multiple cases or contacts simultaneously.* Let's review each method!

Mailing Wizard by Case

Using a single template, the Mailing Wizard by Case option allows the user to create and send one document to multiple recipients simultaneously.

Make your selections for Source > Case:

- **Case** - From the dropdown, select the Case where the recipients are associated.
- **Contact Types** - Select one or many Contact Types.
- **Recipients** - Checkbox "Select All" to select all recipients, or checkbox the individuals.
- **Document Information**
  - Type - Select the library type where the template resides.
  - Author - Identify who will be signing the document.
  - Template Category - Select the category for the particular template.
  - Template - Select the name of the template to generate.

Once all selections have been made, choose whether to Preview Documents or Auto Print and then GENERATE!
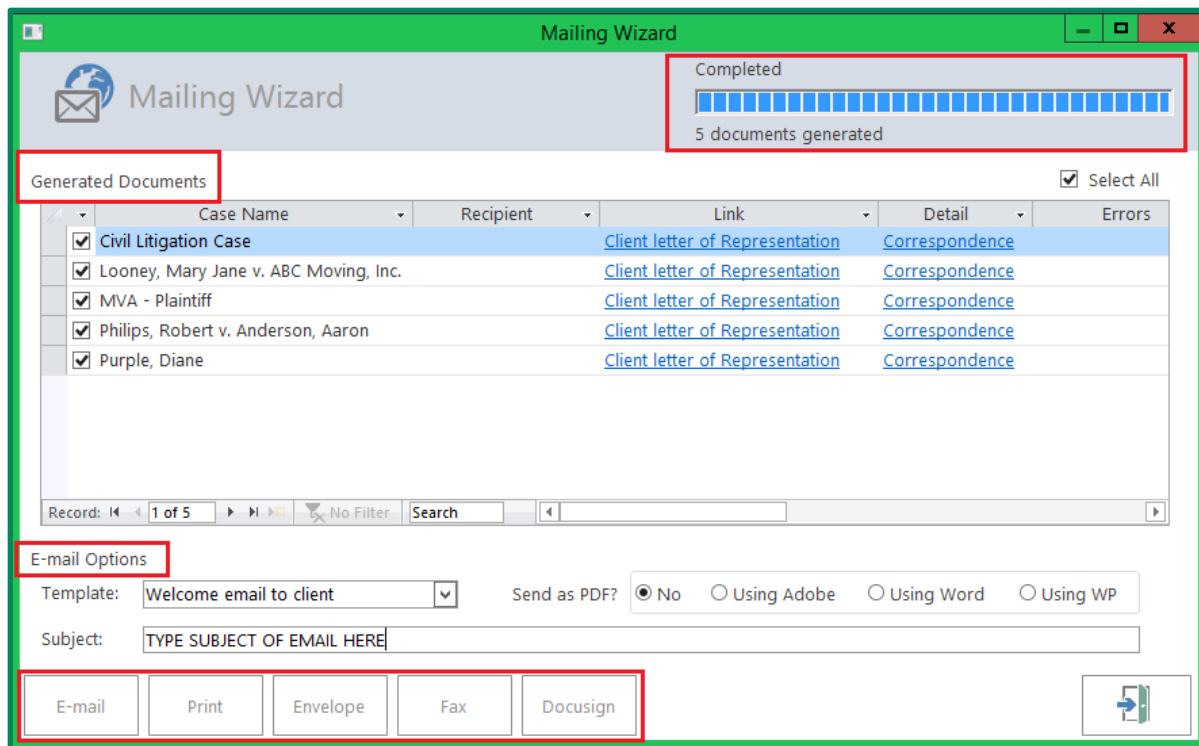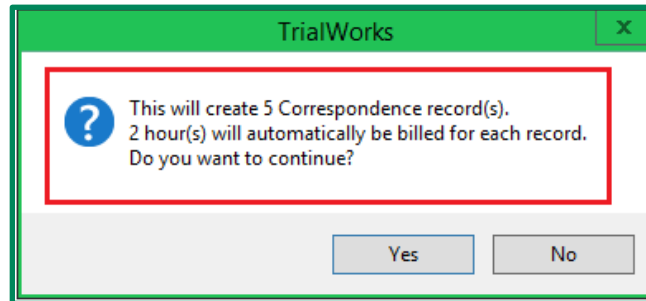
Notice the choices available to transmit, print, or execute the documents:

- ➤ Email
- ➤ Print
- ➤ Envelope
- ➤ Fax
- ➤ Docusign

Where Do the Documents Go?

The final documents are saved in Trialworks on individual rows on the respective Tabs. For example, if you generated a letter from the Correspondence Type, each individual letter will be saved on the Correspondence Tab in each respective case.

Mailing Wizard by Dashboard

Using a single template, the Mailing Wizard by Dashboard option allows the user to make selections from fields contained in a Dashboard *while using filters to further customize selections*.
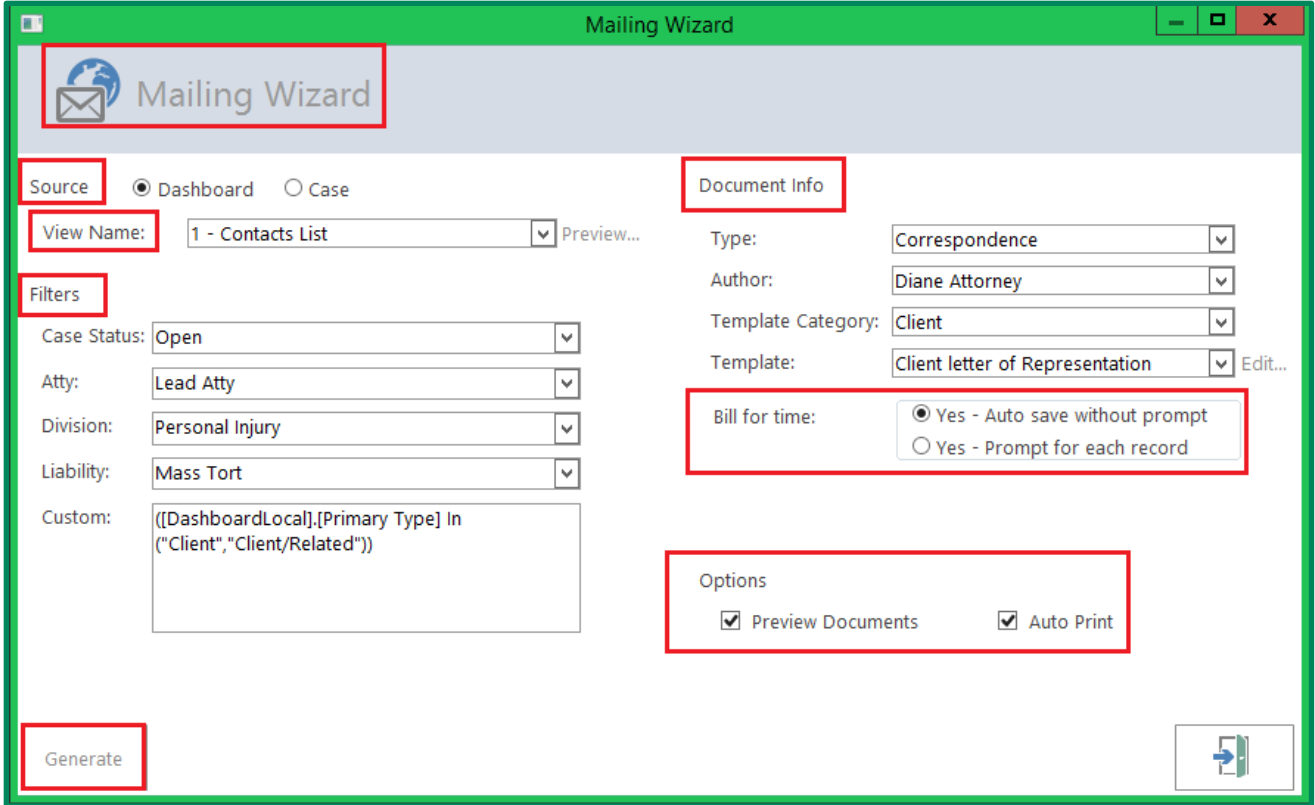
Begin by selecting your Dashboard and, if needed, filter the fields you want to target. For example, if you want to send a letter *only* to Client and Client/Related contact types, click on the down arrow next to the Primary Type column and select "Client" and "Client/Related" checkboxes:
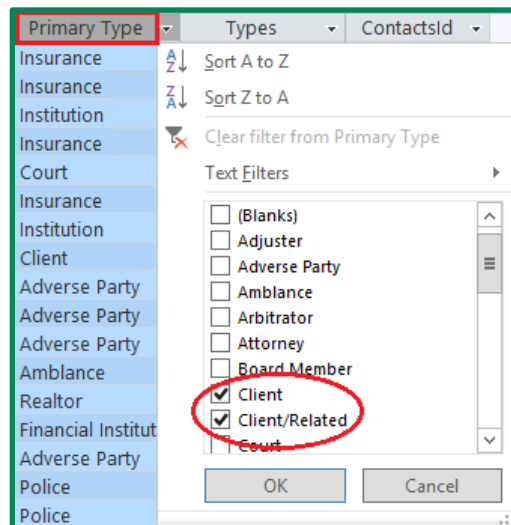
In doing so, the Dashboard will display only those Contact Types selected (e.g., Client and Client/Related.)

Next, click the Mailing Wizard button at the bottom of the screen:

Make your selections for Source > Dashboard:

➢ **View Name** - From the dropdown, select the Dashboard from which to build field

criteria.

  o Preview - Allows user to *view* actual Dashboard before completing Filters section.

➢ **Filters** - Select from any/all/none of the following filters:

  o **Case Status** - Select Case Status such as Open, Closed, Settled, or Rejected.

  o **Atty** - Select the Attorney assigned to the cases.

  o **Division** - Select the applicable Division.

  o **Liability** - Select the type of case liability such as Personal Injury or Mass Tort.

  o **Custom** - Notice that the filter selections made prior to clicking the Mailing

    Wizard button *automatically* appear as "code" in this field because of the

    selections made prior to launching the wizard.

- ➢ **Document Information**
    - o Type - Select the library type where the template resides.
    - o Author - Identify who will be signing the document.
    - o Template Category - Select the category for the particular template.
    - o Template - Select the name of the template to generate.
- ➢ **Bill for Time**
    - o If the template selected also automatically generates a Timekeeper Entry (See, *Using Templates in TrialWorks Guide*,) the "Bill for Time" option will also appear in the Mailing Wizard window. Make your selection to auto save with or without a prompt.

Once all selections have been made, choose whether to Preview Documents or Auto Print, and then GENERATE!

Where Do the Documents Go?

Just as in the Mailing Wizard by Case sample above, the final documents are saved in Trialworks on individual rows on the respective Tabs.

Mailing Wizard

Use the Mailing Wizard to create individual letters or fact sheets with just a click. Whether completing submission forms from Dashboards with UDF custom fields, sending medical records requests to multiple providers, or writing to all members of a single Master Case, the Mailing Wizard automates document creation.