

Merge Across Related

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There may be times when you need to merge the same document to several parties of the same type attached to a matter. For example, you may want to send a medical records request letter to more than one medical provider attached to the same matter at the same time. Prevail has a powerful “Merge Across Related” feature that allows you to merge the same letter for multiple parties at the same time!

1. Click 'Merge Document' in the Prevail toolbar, just as you normally do to begin merging a document.
2. Search for the document you wish to merge, and double-click on it.
3. In the next window, set properties for the merge document (such as time, cost, and task information), if necessary.
4. Before you click 'Next', make sure you check the “Merge Across Related” box in the upper-right area of the window.
5. In the next window, select the parties for whom you'd like to merge the document for by holding down the <Ctrl> key on your keyboard, while clicking once on each name that you'd like to include.
6. When you're finished selecting names, click 'Next' at the bottom of the window.
7. After the merge process completes, one word processing file (Word or WordPerfect) will appear, and it will contain one copy of the merged document for each party you selected. Prevail will create one document entry on the History tab for each party you selected. Time, cost, and task entries will also appear for each party, depending on your document settings.