

MailMerge Overview and Topics

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The SedonaOffice application offers the functionality to generate letters in an automated fashion for your customers based upon template letters your company designs in MSWord. Using this functionality eliminates the burdensome task of manually typing individual letters.

The SedonaOffice Mail Merge functionality uses the Mail Merge feature within Microsoft Office MSWord to generate these letters. Template letters are created using Microsoft Word, and then accessed from the Customer Explorer, Collection Queue, Cancellation Queue and the Customer Query Builder. To generate a Mail Merge letter, the User must first create template letters. The letter templates are designed with pre-determined fields that you always want to print on every letter such as the customer name, address etc. Depending on what type of letter will be generated will determine which fields are defined on the template.

This section will show you how create and generate Mail Merge letters.

NOTE: The field names used for template letters for the Customer Query Builder and other options are different; the setup of all types of letter templates will be covered. This means that a template letter created for use with the Customer Query Builder will not work with Cancellation, Collection or Customer Explorer letters.

Follow the topic links below for instructions on how to locate field names to be used in template letters and other Mail Merge related topics.

Customer Explorer Mail Merge Topics

- [Mail Merge Fields for the Customer Explorer \(Customer Level\)](#)
- [Creating a Mail Merge Letter Template](#)
- [Mail Merge Fields for the Customer Explorer \(Site Level\)](#)
- [Mail Merge Fields for the Customer Explorer \(System Level\)](#)
- [Generating Mail Merge Letters from the Customer Explorer - Customer Level](#)
- [Generating Mail Merge Letters from the Customer Explorer - Site Level](#)
- [Generating Mail Merge Letters from the Customer Explorer - System Level](#)

Collection Queue Mail Merge Topics

- [Mail Merge Fields for Collection Queue Letters](#)
- [Creating a Mail Merge Letter Template](#)
- [Generating Mail Merge Letters from a Collection Queue](#)

Cancellation Queue Mail Merge Topics

- Mail Merge Fields for Cancellation Queue Letters
- Creating a Mail Merge Letter Template
- Generating Mail Merge Letters from a Customer Cancellation Record

Customer Query Builder Mail Merge Topics

- Mail Merge Fields for the Customer Query Builder
- Creating a Mail Merge Letter Template
- Generating Mail Merge Letters from the Customer Query Builder