MailMerge Fields-Customer Explorer-Site Level

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There is a certain set of Mail Merge fields available to include in letter templates for letters generated from the Customer Explorer at the Site level. When creating template letters, you must use the exact Mail Merge field name to be able to pull in that element of data into the final letter.

To access the list of available Mail Merge fields at the Site level, follow the instructions below.

1. Open the Customer Explorer for any customer account.
2. From the Main Application Menu select View / Mail Merge / Show Columns.

3. To view the Mail Merge fields available at the Site level, highlight a Site Record from the customer tree, right-click and select the Mail Merge option. A list of all the available fields at the Site Level will be displayed. At the bottom of the list of fields is a Copy button; you may highlight all fields in the list or selected fields in the list then copy and paste into the MSWord letter template.