MailMerge Fields-Customer Explorer-System Level

Last Modified on 01/09/2023 2:37 pm EST

There is a certain set of Mail Merge fields available to include in letter templates for letters generated from the Customer Explorer. 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 System 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 System level, highlight a System Record from the customer tree, right-click and select the Mail Merge option.