

# Creating a MailMerge Letter Template-Customer Explorer

Last Modified on 01/09/2023 2:34 pm EST

The SedonaOffice Mail Merge functionality uses the Mail Merge feature within Microsoft Office MSWord to generate letters. Before letters may be generated, template letters must first be created.

This section provides information on how to create a simple template letter. The instructions provided below are for setting up a template letter to be used when generating Mail Merge letters from the Customer Explorer, a Collection Queue, or a Customer Cancellation Record.

1. To begin, open Microsoft Word.

2. Type into the template letter the information that will print on all Mail Merge letters generated. You may embed an image file for your company logo if desired.

□

3. Next you will either paste in the desired mail merge field names or manually type them into the template letter. If manually typing in the mail merge field names each field must be preceded with the characters << and followed by the characters >>. These are control characters which Microsoft Word uses to identify a mail merge field.

□

4. Once the letter template is finished, save the template letter to the desired location as a Word Template type document.

□