

# Generate MailMerge Letters-Customer Explorer-Customer Level

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A Mail Merge letter may be generated from the Customer Explorer using a pre-designed template letter (see [Creating a Template Letter](#)). Depending on which Mail Merge fields are included in the letter template, will depend on where the User will initiate the Mail Merge function.

1. If the letter template contains Customer related Mail Merge fields only, open a Customer Explorer record. Highlight Customer Information from the customer tree; right-click and select the Mail Merge option.

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2. The Windows File Explorer will open. Locate the template letter to be used then click the Open button.

3. In a few seconds a MSWord Document1 will display on the workstation windows tray. Double-click on the Document1 to view the generated Mail Merge letter.

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4. In the screen shot below, the highlighted areas is the information brought into the letter from the Mail Merge fields set up on the letter template. You may modify the letter if additional information needs to be entered, then print the letter. If your company is using SedonaDocs, you may want to save the letter and attach to the Customer documents.

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