Generate MailMerge Letters-Customer Explorer-System 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 and/or Site and/or System related Mail Merge fields, open a Customer Explorer record. Highlight a System record 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 document from the Mail Merge fields set up on the template. The User may modify the document if additional information needs to be entered, then print the letter. If your company is using SedonaDocs, the User may want to save the letter and attach to the System documents.

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