

MailMerge Fields-Cancellations

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There is a certain set of Mail Merge fields available to include in letter templates for letters generated from a Cancellation record. 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 for a single Customer Cancellation record, follow the instructions below.

1. From the Main Application Menu select View / Mail Merge / Show Columns.

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2. From the main application menu, double-click on the Client Management module, then double-click on the Cancellations option.

3. The Cancellation Queue will be displayed; double-click to open any one of the pending customer cancellation records within the list.

4. To view the Mail Merge fields available at the Cancellations level, click the Mail Merge button located at the lower left of the Customer Cancellation record. 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.

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