

Generating MailMerge Letters-Cancellation Queue

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A Mail Merge letter may be generated from a Customer Cancellation Record using a pre-designed template letter (see [Creating a Template Letter](#)).

Follow the steps below to generate a Mail Merge for a Customer Cancellation Record.

1. Navigate to the Client Management / Cancellations and open a Cancellation record.
2. Once the Cancellation record is displayed, click the Mail Merge button located at the lower left of the cancellation form.

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3. The Windows File Explorer will open. Locate the template letter to be used then click the Open button.
4. 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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5. 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 Customer documents.

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