MailMerge-Customer Query Builder-Fields

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

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

2. From the main application menu, double-click on the Client Management module, then double-click on the Customer Query Builder option.
3. The Customer Query Builder tool will be displayed.
4. To view the Mail Merge fields available for the Customer Query Builder, you must first have a listing of the fields you wish to use in a Mail Merge letter. You may either double-click to add fields on the left pane of the Customer Query Builder, or open a previously saved query that contains the desired fields.
5. Once a list of desired fields is displayed, click on the Mail Merge button located at the bottom of the Customer Query Builder designer form. A list of all the available fields that are currently displayed in the Fields to Display section of the Customer Query Builder Designer form will be listed. 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.