Creating a MailMerge Letter Template-Customer Query Builder

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The SedonaOffice Mail Merge functionality uses the Mail Merge feature within Microsoft Office MSWord to generate letters. Before letters may be generated, template letters must first be created.
This section provides information on how to create a simple template letter. The instructions provided below are for setting up a template letter to be used when generating Mail Merge letters from the Customer Query Builder.

1. To begin, open Microsoft Word.
2. Type into the template letter the information that will print on all Mail Merge letters generated. You may embed an image file for your company logo if desired.

Paste In MailMerge Fields

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 a Customer Query letter, 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.

5. Next you will either paste in the desired mail merge field names or manually type them into the template letter. If manually typing in the mail merge field names each field must be preceded with the characters << and followed by the characters >>. These are control characters which Microsoft Word uses to identify a mail merge field.

6. Once the letter template is finished, save the template letter to the desired location as a Word Template type document.

Upload Letter Template to the Template Server

Once template letters have been created and saved, thye must be uploaded to the SedonaOffice Template Server to be available for selection when generating letters from the Customer Query Builder.

1. From the Main Application Menu select View / Mail Merge / Use Template Server.

2. From the Main Application Menu select Tools / Letter Templates.

3. The TemplateList will be displayed. Letter templates used for Collections and the Customer Query Builder are stored here. To add a new template letter to the list, click on the Add button located at the lower right of the list.

4. The MailMerge Template Add form will be displayed. Enter a Title, Description, select a Security Level, and make certain the Type is set to Customer Query. Click on the ellipse button to locate the previously saved letter template.

5. The windows file explorer will open. Make certain the document type of Word Template is selected. Double-click on the desired file, and then click on the Open button at the lower right.

6. The selected file will fill into the grid area. If you have more than one letter template, click on the ellipse button in the grid area on the next blank row, and make additional file selections. When finished, click the Upload button located at the lower right.

7. Once the letter has been uploaded, it will appear in the TemplateList. Click on the Close button at the lower right when finished.