

Generate MailMerge Letters-Customer Query Builder

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

Follow the link for Instructions on locating the available Mail Merge fields to create CQB template letters. [Available Mail Merge Fields for the Customer Query Builder](#)

Follow the steps below to generate a Mail Merge from the Customer Query Builder.

1. Open the Customer Query Builder; Client Management / Customer Query Builder.
2. Open the previously saved CQB Report Design from which the Mail Merge template letter that will be used was designed.
3. Click the Refresh button located at the lower left of the CQB Designer form. This grid area will populate with qualified records for you query. In the example below, 12 customers are eligible for the letter.
4. Click the Mail Merge button located on the Button Toolbar at the bottom of the CQB Designer form.
5. The Customer Query Templates list will be displayed. Highlight the desired letter then click the Select button at the lower right of the list.

6.

A message will be displayed indicating the letters are being generated. Depending on the number of rows within the query results grid, this may take some time.

7. When the letter generation process is finished, a message will be displayed asking the User if you want to create an event in the Sedona Event Log indicating a letter was created. Typically the User will select the Yes option button.

A MSWord Document1 will display on the workstation windows tray. Double-click on the Document1 to view and print the generated Mail Merge letter(s).

Below is a sample MailMerge letter created from the Customer Query Builder

