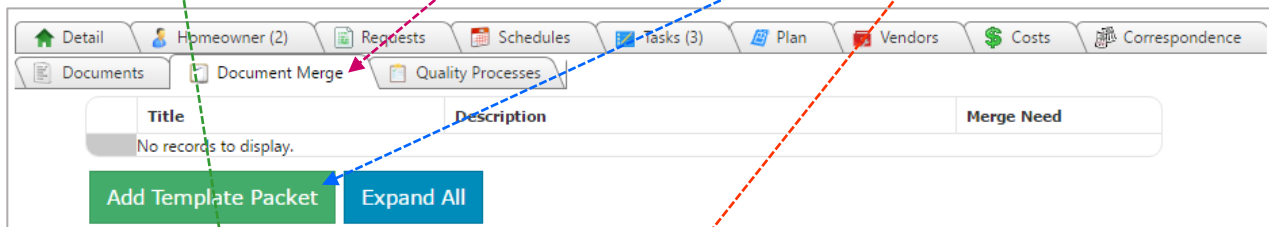


How to use Document Merge

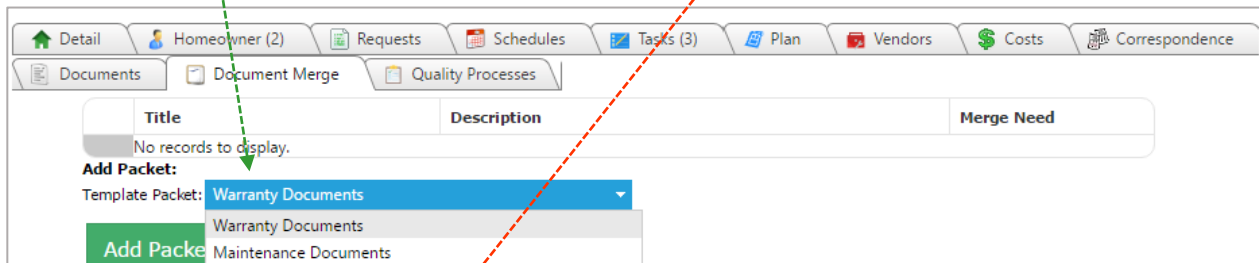
Merging Template Packets

Documents can be merged two (2) ways.

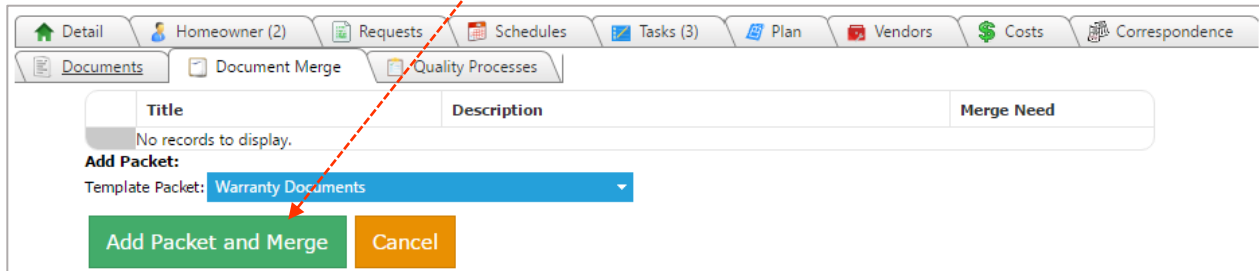
1. Within the Job click on the Document Merge Tab single click the **Add Template Packet** button select the packet you would like to merge from the drop down then click the **Add Packet and Merge** button.



This screenshot shows the 'Document Merge' tab selected in the software interface. The top navigation bar includes 'Detail', 'Homeowner (2)', 'Requests', 'Schedules', 'Tasks (3)', 'Plan', 'Vendors', 'Costs', and 'Correspondence'. Below the navigation, there are tabs for 'Documents', 'Document Merge', and 'Quality Processes'. A table with columns 'Title', 'Description', and 'Merge Need' is visible, with the text 'No records to display.' below it. A green button labeled 'Add Template Packet' and a blue button labeled 'Expand All' are located at the bottom of the table area.



This screenshot shows the 'Add Packet' dropdown menu open. The 'Add Packet:' label is followed by a dropdown menu showing 'Warranty Documents' as the selected option. Below the dropdown, there are two options: 'Warranty Documents' and 'Maintenance Documents'. A green button labeled 'Add Packet' is positioned to the left of the dropdown menu.

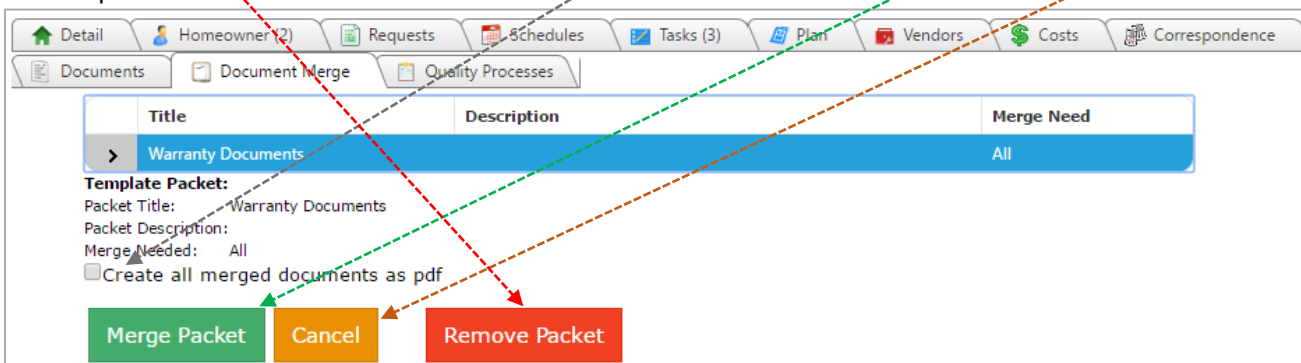


This screenshot shows the 'Add Packet and Merge' button highlighted in green. The dropdown menu is still open, showing 'Warranty Documents' as the selected option. A yellow button labeled 'Cancel' is located to the right of the 'Add Packet and Merge' button.

Note: To merge additional packets repeat the steps

How to use Document Merge

- If the option **Assign to All Jobs** was selected when the template packet(s) were setup by the Administrator. That means all the template packets are associated with all jobs. Search the job using your preferred search method, click the Document Merge tab. Single click on the Title (Packet) to expand then you have the following options check the box to **Create all merged documents as pdf**, **Merge Packet**, **Cancel** or **Remove Packet**. Click the Merge Packet button to proceed with merging the document(s) within the packet.



Detail Homeowner (2) Requests Schedules Tasks (3) Plan Vendors Costs Correspondence

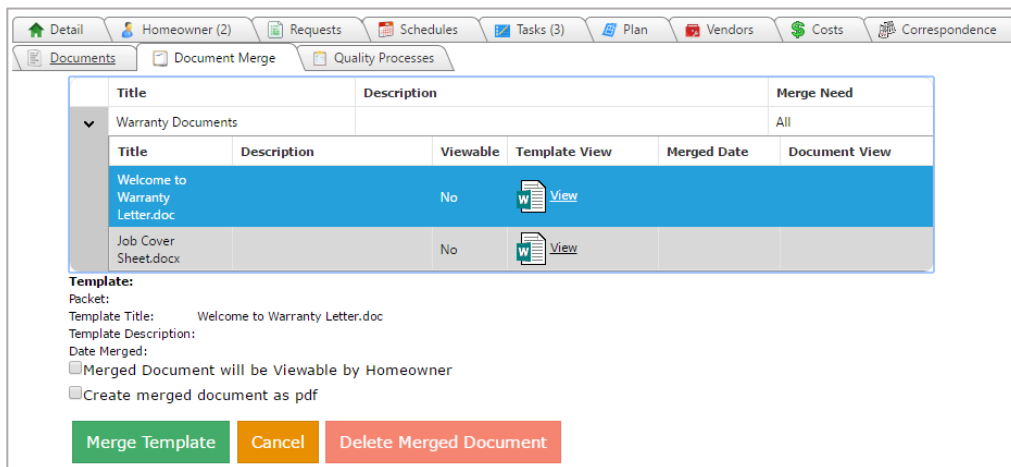
Documents Document Merge Quality Processes

Title	Description	Merge Need
> Warranty Documents		All

Template Packet:
 Packet Title: Warranty Documents
 Packet Description:
 Merge Needed: All
 Create all merged documents as pdf



Merge Packet Cancel Remove Packet

Note: if a packet has more than one document within it and you only need to merge one of those documents click the > to expand then single click the document you would like to merge.



Detail Homeowner (2) Requests Schedules Tasks (3) Plan Vendors Costs Correspondence

Documents Document Merge Quality Processes

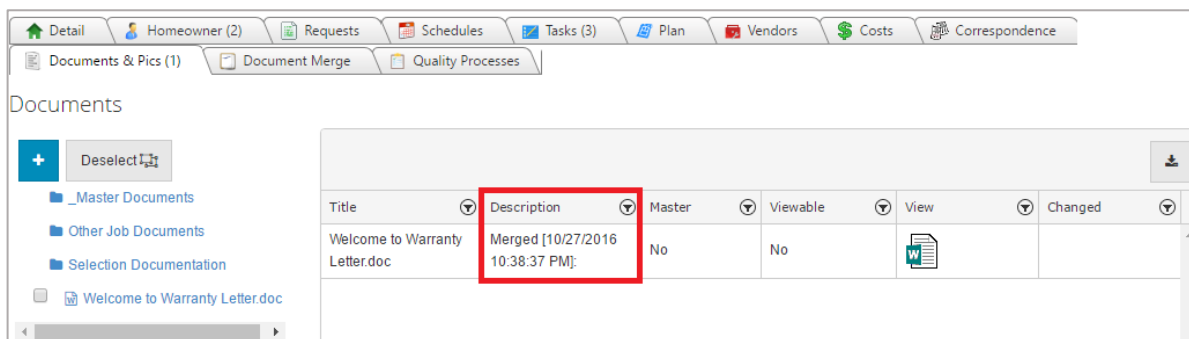
Title	Description	Merge Need			
▼ Warranty Documents		All			
Title	Description	Viewable	Template View	Merged Date	Document View
Welcome to Warranty Letter.doc		No	 View		
Job Cover Sheet.doc		No	 View		

Template:
 Packet:
 Template Title: Welcome to Warranty Letter.doc
 Template Description:
 Date Merged:
 Merged Document will be Viewable by Homeowner
 Create merged document as pdf

Merge Template Cancel Delete Merged Document

When merging the templates, the document(s) are stored and viewable within the Documents & Pics tab.

Note: The Description field will auto fill with the merge date and time.



Detail Homeowner (2) Requests Schedules Tasks (3) Plan Vendors Costs Correspondence

Documents & Pics (1) Document Merge Quality Processes

Documents

+ Deselect

- _Master Documents
- Other Job Documents
- Selection Documentation
- Welcome to Warranty Letter.doc

Title	Description	Master	Viewable	View	Changed
Welcome to Warranty Letter.doc	Merged [10/27/2016 10:38:37 PM]:	No	No	