

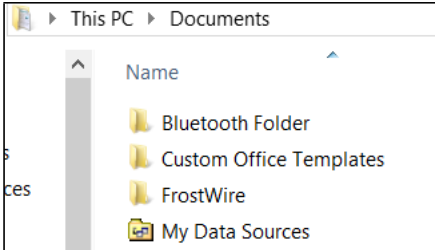
Document Merge Instructions

for Microsoft Word Documents

This document explains how to create word merge documents using Microsoft Word.

Step 1: Save the Merge Data Source 1-NET (excel file) on your computer or server to access later.

Recommendation: The best location to save the Merge Data Source 1-NET is within the My Data Sources folder which is located in the Documents Folder. Typically when using the word merge feature it opens the My Data Sources folder by default.



Step 2: Chose the word document that you would like to add merge fields to.

Step 3: Open the document.

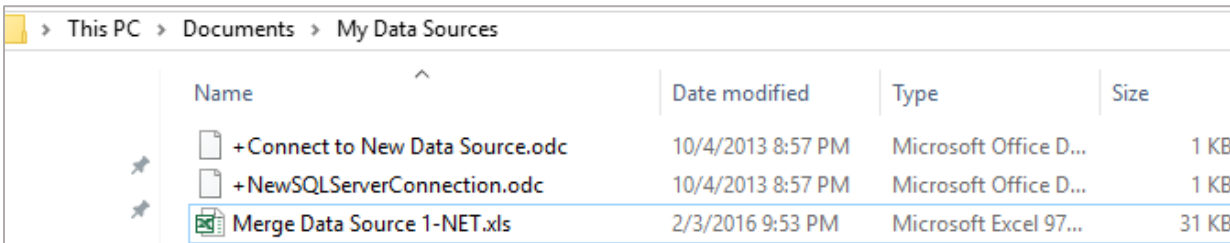
How to connect to the excel data source:

IMPORTANT: Merge Data Source 1-NET Field and Descriptions are available on pages 5-9

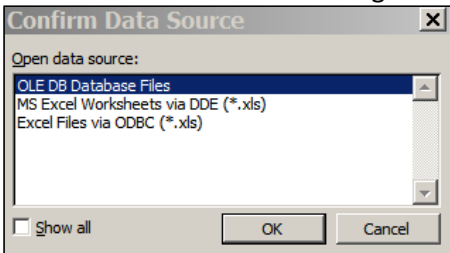
Word 2003: Tools→ Letters and Mailings→ Mail Merge→ Select document type→ then Step 1 of 6→ Select Starting document→ Step 2 of 6 Select Recipients→ Use an Existing List→ Browse

Word 2007, 2010 & 2013: Mailings→ Select Recipients→ Use an Existing List

Note: the following screen may display by default if you're using **Word 2007, 2010 & 2013**. If the Merge Data Source are not displayed within this screen you will need to browse to the location where the Merge Data Sources have been saved to make the connection.



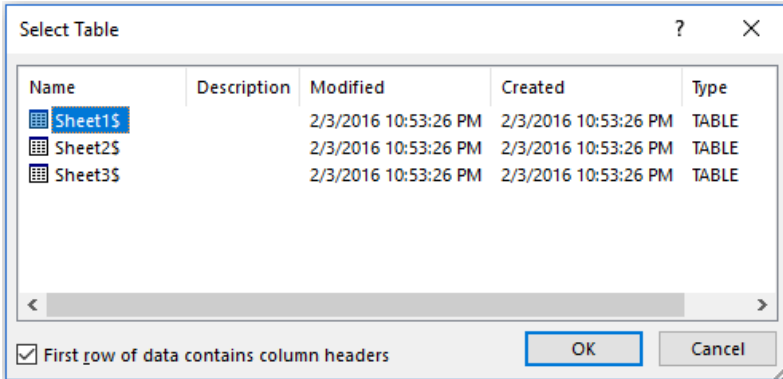
Word 2003 ONLY: The following screen will display→ Click OK



Word 2003, 2007, 2010 & 2013: After selecting the Merge Data Source needed to add the word merge fields into your word document the following screen will display→ Click OK

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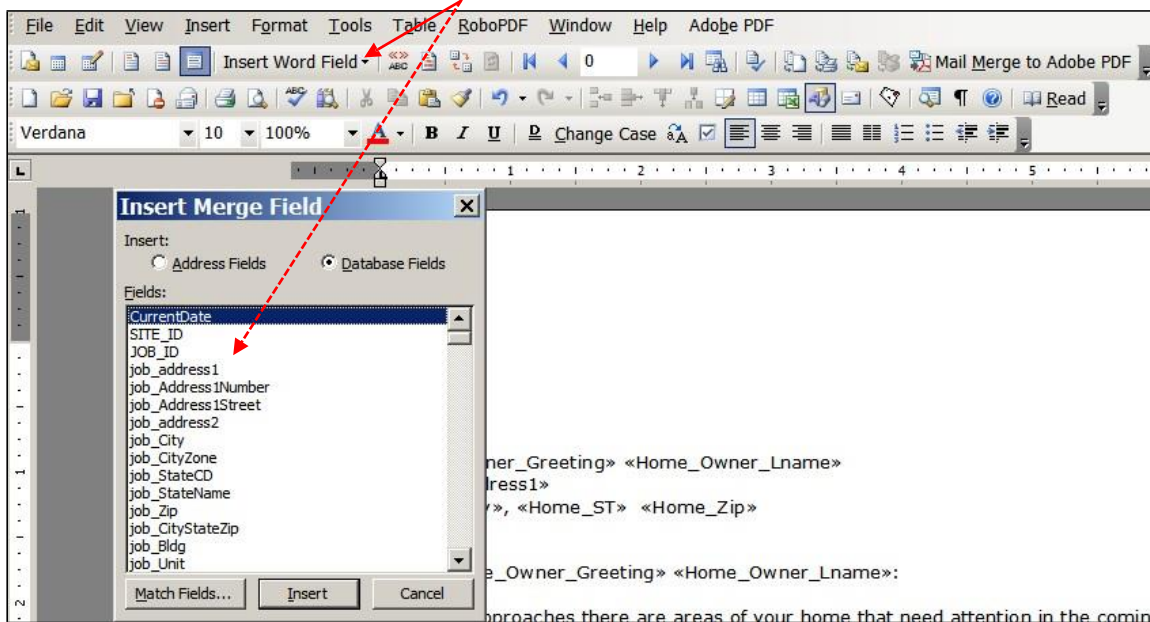


After clicking 'OK' the merge fields will be available to insert into the word document.

Note: The online mail merge is case sensitive so if you are typing in the merge field, please make sure you use exact spelling and upper/lower case.

How to add a merge field

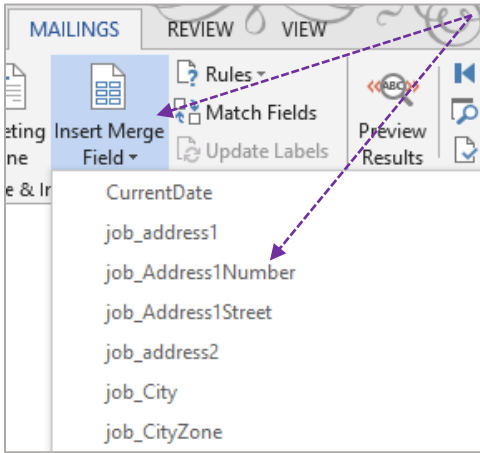
Word 2003: Click 'Insert Word Field' the merge fields will be displayed to choose from.



Word 2007, 2010 & 2013: Click 'Insert Merge Field' the merge fields will be displayed to choose from.

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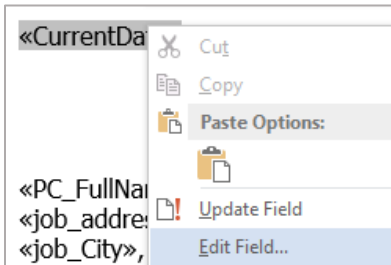
for Microsoft Word Documents



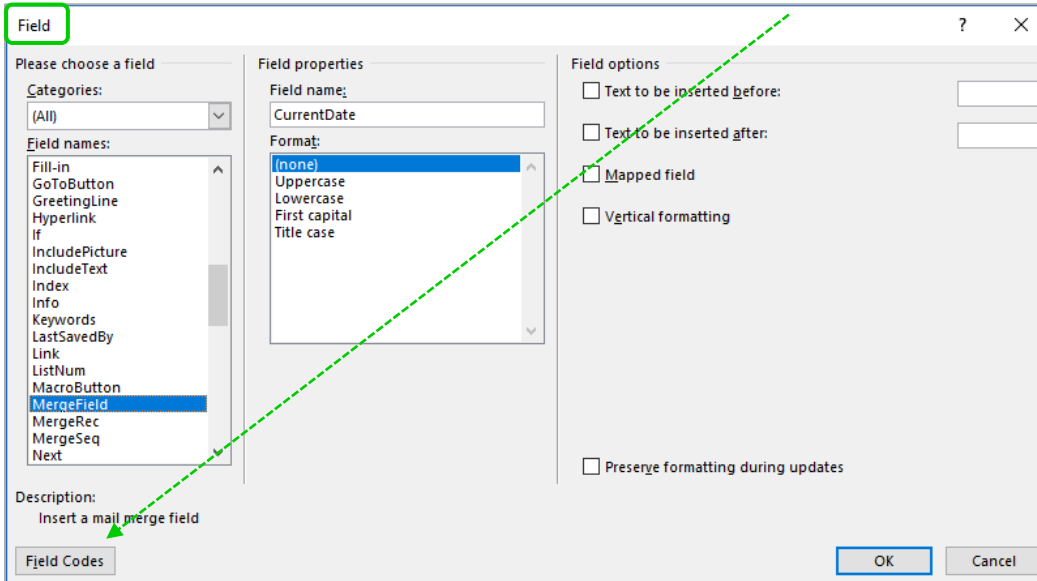
IMPORTANT: When using the CurrentDate merge field formatting will need to be completed for the dates to appear properly.

Date Formats: October 21, 2016 or 10/21/2016

To format the <<CurrentDate>> merge field right click on the merge field and select “Edit Field...”



After selecting Edit Field... the field screen will appear click the “Field Codes” button.



Within the “Advanced field properties” → Field codes: line add the format of how you would like the date to appear within your word document.

Format Options:

For **October 21, 2016** use:

For **10/21/2016** use:

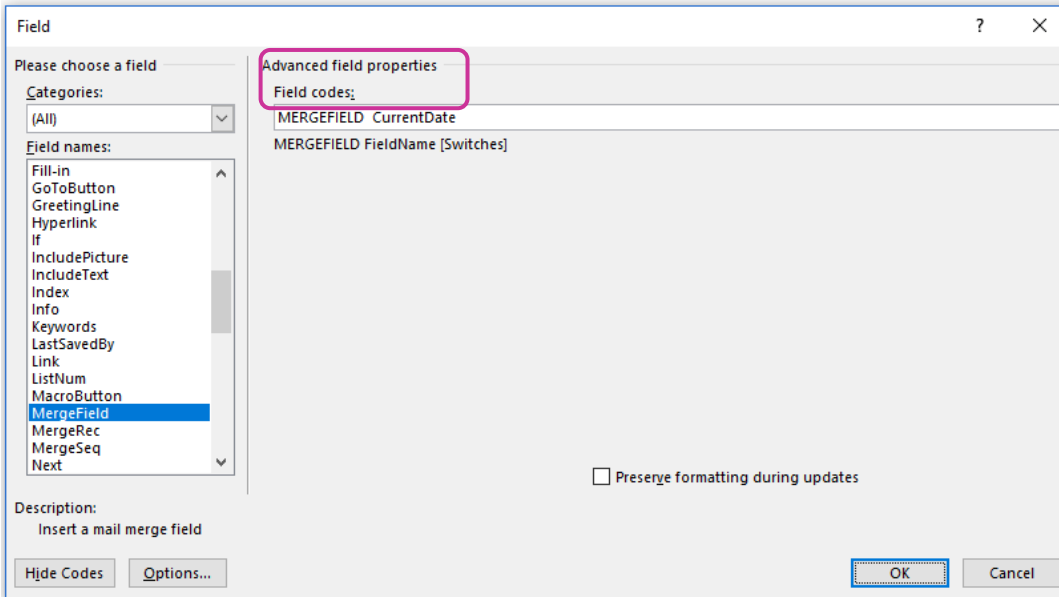
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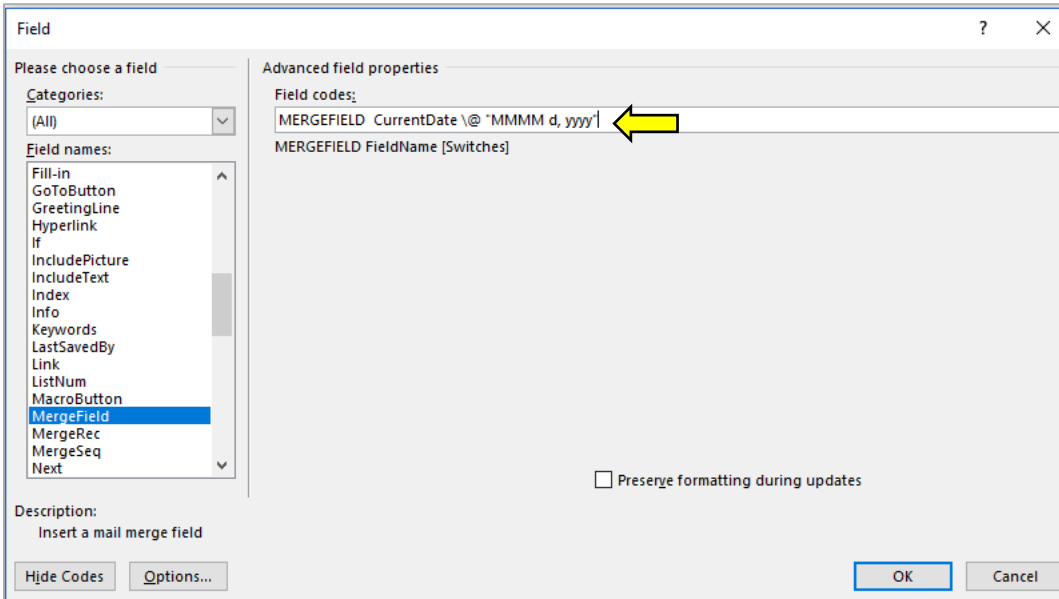
`MERGEFIELD CurrentDate \@ "MMMM d, yyyy"`

`MERGEFIELD CurrentDate \@ "M/d/yyyy"`

IMPORTANT: The quotation marks around the format string *MUST* be used.



Example of the format applied within the Field codes line.



Once the date format has been added into Field codes line, click OK.

IMPORTANT: Ensure the "Preserve formatting during updates" is not checked.

For the next step please refer to the following reference document **How to add Document Templates** available on the University under Training Documents → Administrator.

Merge Data Source Fields and Definitions

Description of what each database field represents in easy to understand nomenclature. Please note some of the

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database fields are terminology driven and you may be using a different terminology than noted in the database field and definitions below.

Database Field

CurrentDate
 Job_Name
 job_address1
 job_Address1Number
 job_Address1Street
 job_address2
 job_City
 job_CityZone
 job_StateCD
 job_StateName
 job_Zip
 job_CityStateZip
 job_Bldg
 job_Unit
 job_BldgAndUnit
 job_FullAddress
 job_LotBlock
 job_JobID
 Red_Flag
 job_WarrantyDate_Start
 job_WarrantyDate_Sold
 job_WarrantyDate_PreClose
 job_WarrantyDate_Expired
 job_WarrantyDate_Contracted
 job_WarrantyDate_Closed
 job_WarrantyDate_StructureExpire
 job_Status
 job_Custom_1
 job_Custom_2
 job_Custom_3
 job_Custom_4
 job_Custom_5
 job_Custom_6
 Staff_cont_FirstName
 Staff_cont_MI
 Staff_cont_LastName
 Staff_cont_Initials
 Staff_cont_FullName
 Staff_cont_ContactName
 Staff_cont_Email
 Staff_BUILDER_Contact_Phone1

Definition

Current Date
 Job/Home Name
 Job/Home Address 1
 Job/Home Address 1 Number
 Job/Home Address 1 Street Name
 Job/Home Address 2
 Job/Home City
 Job/Home City Zone
 Job/Home State/Province 2 Digit Code
 Job/Home State/Province Name
 Job/Home Zip/Postal Code
 Job/Home City, State, Zip
 Job/Home Bldg
 Job/Home Unit
 Job/Home Bldg and Unit in one field
 Job/Home Full address in one field
 Job/Home Lot/Block
 Job/Home Job ID
 Job/Home Red Flagged (yes or No)
 Job Warranty Start date of construction
 Job Warranty Sold date
 Job Warranty Pre-close date
 Job Warranty Expiration date
 Job Construction – Contract date
 Job Warranty Close date
 Job Warranty – Structural expiration date
 Job Status – Active, Inactive, Deleted
 Job Custom field order 1
 Job Custom field order 2
 Job Custom field order 3
 Job Custom field order 4
 Job Custom field order 5
 Job Custom field order 6
 Typically named – CSR first name
 Typically named – CSR middle initial
 Typically named – CSR last name
 Typically named – CSR initials emp file
 Typically named – CSR full name
 Typically named – CSR contact name
 Typically named – CSR email address
 Phone 1

Database Field

Staff_BUILDER_Contact_Phone2
 Staff_BUILDER_Contact_Phone3
 Staff_BUILDER_Contact_Phone4
 Staff_BUILDER_Contact_Phone5
 Staff_BUILDER_Contact_Phone1_Type
 Staff_BUILDER_Contact_Phone2_Type
 Staff_BUILDER_Contact_Phone3_Type

Definition

Phone 2
 Phone 3
 Phone 4
 Phone 5
 Phone 1 type
 Phone 2 type
 phone 3 type



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Staff_BUILDER_Contact_Phone4_Type	Phone 4 type
Staff_BUILDER_Contact_Phone5_Type	phone 5 type
Super_cont_ContactName	Typically named – Supervisor contact name
Super_cont_FirstName	Typically named – Supervisor first name
Super_cont_LastName	Typically named – Supervisor last name
Super_cont_MI	Typically named – Supervisor middle initial
Super_cont_FullName	Typically named – Supervisor full name
Super_cont_Email	Typically named – Supervisor email address
Super_BUILDER_Contact_Phone1	Phone 1
Super_BUILDER_Contact_Phone2	Phone 2
Super_BUILDER_Contact_Phone3	Phone 3
Super_BUILDER_Contact_Phone4	Phone 4
Super_BUILDER_Contact_Phone5	Phone 5
Super_BUILDER_Contact_Phone1_Type	Phone 1 Type
Super_BUILDER_Contact_Phone2_Type	Phone 2 Type
Super_BUILDER_Contact_Phone3_Type	Phone 3 Type
Super_BUILDER_Contact_Phone4_Type	Phone 4 Type
Super_BUILDER_Contact_Phone5_Type	Phone 5 Type
PC_FirstName	Primary – First Name
PC_MI	Primary – Middle Initial
PC_LastName	Primary – Last Name
PC_FullName	Primary – Full Name
PC_Initials	Primary – Initials
PC_Address1	Primary – Address 1
PC_Address2	Primary – Address 2
PC_City	Primary – City
PC_StateCD	Primary – State/Province 2 digit code
PC_StateName	Primary – State/Province name
PC_Zip	Primary – ZIP/Postal Code
PC_CityStateZip	Primary – City, State/Province, Zip/PC
PC_FullAddress	Primary – Full address
PC_Email	Primary – Email Address
PC_JOB_Contact_Phone1	Primary – Phone 1
PC_JOB_Contact_Phone2	Primary – Phone 2
PC_JOB_Contact_Phone3	Primary – Phone 3
PC_JOB_Contact_Phone4	Primary – Phone 4
PC_JOB_Contact_Phone5	Primary – Phone 4
PC_JOB_Contact_Phone1_Type	Primary – Phone Type 1
PC_JOB_Contact_Phone2_Type	Primary – Phone Type 2
PC_JOB_Contact_Phone3_Type	Primary – Phone Type 3
PC_JOB_Contact_Phone4_Type	Primary – Phone Type 4
PC_JOB_Contact_Phone5_Type	Primary – Phone Type 5
PC_Salutation	Primary - Salutation

Database Field

Definition

PC_logon_LogonID	Primary – Logon ID
PC_Title	Primary – Title
SC_FirstName	Secondary – First Name
SC_LastName	Secondary – Last name
SC_MI	Secondary – Middle Initial
SC_Initials	Secondary – Initials
SC_FullName	Secondary – Full name
SC_Email	Secondary – Email Address
SC_logon_LogonID	Secondary – Logon ID
SC_Address1	Secondary – address 1

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SC_Address2	Secondary – address 2
SC_City	Secondary - City
SC_StateCD	Secondary – State Code
SC_Zip	Secondary – ZIP
SC_CityStateZip	Secondary – City, State/Prov, Zip/PC
SC_FullAddress	Secondary – Full address
SC_JOB_Contact_Phone1	Secondary – Phone 1
SC_JOB_Contact_Phone2	Secondary – Phone 2
SC_JOB_Contact_Phone1_Type	Secondary – Phone 1 Type
SC_JOB_Contact_Phone2_Type	Secondary – Phone 2 Type
SC_Title	Secondary – Title
Floor_Plan_Name	Floor Plan Name
proj_Desc	Project/Subdivision Description
proj_Status	Project/Subdivision status (active, inactive, deleted)
proj_City	Project/Subdivision City
proj_StateCD	Project/Subdivision State CD/Prov CD
proj_StateName	Project/Subdivision State/Prov name
proj_Zip	Project/Subdivision Zip
proj_CityStateZip	Project/Subdivision City, State/Prov, Zip/PC
proj_County	Project/Subdivision County
proj_Code	Project/Subdivision Code
proj_Location	Project/Subdivision Address 1
proj_Subdivision	Project/Subdivision Address 2
build_BuilderName	Your Company Name
build_Address1	Your Company Address 1
build_Address2	Your Company Address 2
build_City	Your Company City
build_StateCD	Your Company State/Province CD
build_StateName	Your Company State/Province name
build_Zip	Your Company ZIP/PC
build_CityStateZip	Your Company City, State/Province, Zip/PC
BUILDER_Phone3	Your Company Phone 3
BUILDER_Phone1	Your Company Phone 1
BUILDER_Phone2	Your Company Phone 2
BUILDER_Phone4	Your Company Phone 4
BUILDER_Phone5	Your Company Phone 5
BUILDER_Phone1_Type	Your Company Phone Type 1
BUILDER_Phone2_Type	Your Company Phone Type 2
BUILDER_Phone3_Type	Your Company Phone Type 3
BUILDER_Phone4_Type	Your Company Phone Type 4

Database Field

BUILDER_Phone5_Type
 build_OwnerWebSite
 build_VendorWebSite
 build_WebSite
 build_FullAddress
 site_SiteDesc
 site_Address1
 site_Address2
 site_City
 site_StateCD
 site_StateName
 site_Zip
 site_CityStateZip

Definition

Your Company Phone Type 5
 Your Company URL job
 Your Company URL Vendor
 Your Company Web URL
 Your Company Full Address
 Site/Division/Office/Location
 Site – address 1
 Site – Address 2
 Site - City
 Site – State CD/Province 2 digit code
 Site – State/Province Name
 Site – Zip/Postal Code
 Site – City/State or Proc/Zip or PC

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site_FullAddress
 site_ContName
 site_ContPhone
 site_ContFax
 site_ContEmail
 proj_PC_FirstName
 proj_PC_MI
 proj_PC_LastName
 proj_PC_Initials
 proj_PC_FullName
 proj_PC_Address1
 proj_PC_Address2
 proj_PC_City
 proj_PC_StateCD
 proj_PC_StateName
 proj_PC_Zip
 proj_PC_CityStateZip
 proj_PC_FullAddress
 proj_PC_Email
 proj_PC_Contact_Phone1
 proj_PC_Contact_Phone2
 proj_PC_Contact_Phone3
 proj_PC_Contact_Phone4
 proj_PC_Contact_Phone5
 proj_PC_Contact_Phone1_Type
 proj_PC_Contact_Phone2_Type
 proj_PC_Contact_Phone3_Type
 proj_PC_Contact_Phone4_Type
 proj_PC_Contact_Phone5_Type
 proj_PC_Title
 proj_SC_FirstName
 proj_SC_MI
 proj_SC_LastName
 proj_SC_Initials
 proj_SC_FullName
 proj_SC_Address1
 proj_SC_Address2

Database Field

proj_SC_City
 proj_SC_StateCD
 proj_SC_StateName
 proj_SC_Zip
 proj_SC_CityStateZip
 proj_SC_FullAddress
 proj_SC_Email
 proj_SC_Contact_Phone1
 proj_SC_Contact_Phone2
 proj_SC_Contact_Phone3
 proj_SC_Contact_Phone4
 proj_SC_Contact_Phone5
 proj_SC_Contact_Phone1_Type
 proj_SC_Contact_Phone2_Type
 proj_SC_Contact_Phone3_Type
 proj_SC_Contact_Phone4_Type

Site – Full Address
 Site – Contact Full name
 Site - Phone
 Site - Fax
 Site – Email
 Project/Subdivision – Primary Contact – First name
 Project/Subdivision – Primary Contact – Middle Initial
 Project/Subdivision – Primary Contact – Last name
 Project/Subdivision – Primary contact - Initials
 Project/Subdivision – Primary contact – Full name
 Project/Subdivision – Primary Contact – Address 1
 Project/Subdivision – Primary contact – address 2
 Project/Subdivision – Primary contact - City
 Project/Subdivision – Primary Contact – State/Prov code
 Project/Subdivision – Primary Contact – State/Prov name
 Project/Subdivision – Primary contact – Zip/PC
 Project/Subdivision – Primary contact – City/State/ProvZip/PC
 Project/Subdivision – Primary contact – Full address
 Project/Subdivision – Primary Contact – Email
 Project/Subdivision – Primary contact – Phone 1
 Project/Subdivision – Primary contact – Phone 2
 Project/Subdivision – Primary contact – Phone 3
 Project/Subdivision – Primary contact – Phone 4
 Project/Subdivision – Primary contact – Phone 5
 Project/Subdivision – Primary Contact – Phone 1 type
 Project/Subdivision – Primary Contact – Phone 2 type
 Project/Subdivision – Primary Contact – Phone 3 type
 Project/Subdivision – Primary Contact – Phone 4 type
 Project/Subdivision – Primary Contact – Phone 5 type
 Project/Subdivision – Primary Contact – Title
 Project/Subdivision – Secondary Contact – First name
 Project/Subdivision – Secondary Contact – Middle Initial
 Project/Subdivision – Secondary Contact – Last name
 Project/Subdivision – Secondary contact - Initials
 Project/Subdivision – Secondary contact – Full name
 Project/Subdivision – Secondary Contact – Address 1
 Project/Subdivision – Secondary contact – address 2

Definition

Project/Subdivision – Secondary contact - City
 Project/Subdivision – Secondary Contact – State/Provcode
 Project/Subdivision – Secondary Contact – State/Prov name
 Project/Subdivision – Secondary contact – Zip/PC
 Project/Subdivision – Secondary contact – City/State/Prov Zip/PC
 Project/Subdivision – Secondary contact – Full address
 Project/Subdivision – Secondary Contact – Email
 Project/Subdivision – Secondary contact – Phone 1
 Project/Subdivision – Secondary contact – Phone 2
 Project/Subdivision – Secondary contact – Phone 3
 Project/Subdivision – Secondary contact – Phone 4
 Project/Subdivision – Secondary contact – Phone 5
 Project/Subdivision – Secondary Contact – Phone 1 type
 Project/Subdivision – Secondary Contact – Phone 2 type
 Project/Subdivision – Secondary Contact – Phone 3 type
 Project/Subdivision – Secondary Contact – Phone 4 type

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proj_SC_Contact_Phone5_Type	Project/Subdivision – Secondary Contact – Phone 5 type
proj_SC_Title	Project/Subdivision – Secondary Contact – Title
job_RedFlag	Is Job Red Flagged (yes/no)
Staff2_FullName	Staff2
Staff2_Address1	Staff2 Address1
Staff2_Address2	Staff2 address2
Staff2_CityStateZip	Staff2 City/State or Province/Zip/Postal Code
Staff2_Email	Staff2 email
Staff2_Phone1	Staff2 phone 1
Staff2_Phone1_Type	Staff2 Phone 2
Staff2_Phone2	Staff2 Phone 1 type
Staff2_Phone2_Type	Staff2 Phone 2 type
ListType	List Type Description
DateListSubmitted	Date Submitted
list_DateListOpened	Date Opened
DateContacted	Date Contacted
LIST_ReviewDate	Date Reviewed Start
LIST_ReviewDateEnd	Date Reviewed end
LIST_RepairDate	Date scheduled for repair start
LIST_RepairDateEnd	Date scheduled for repair end
list_SignOff_StaffDate	Sign off List date – Supervisor
list_SignOff_OwnerDate	Sign off List date - owner
list_DateListClosed	Date closed
Item_DateRequested	Date Requested
Item_Request_Service	Service to be performed
Item_Request_ActionTaken	Action taken or follow up on the Item
Category	Category
SubCategory	Sub-category
Determination	Determination