

## Using Merge Fields

Merge fields allow you to enter text that the program will replace with data from another part of the inspection or from a Front Office. (Some of the merge fields contain data that will be available only if the inspection was created from a Front Office order. These can be found on page 5) For example, if you want the property address to appear in a disclaimer, you would add the merge field {{Property Address}}. The program will replace the merge field text with the property address entered in the general information section of the report whenever the report is printed. You can place merge fields in prompts, answers, disclaimers, final comments, or lines, or put them into lists for easy selection.

### Creating your own merge fields

With Inspection Designer you can create merge fields in the inspection by using the Element ID property. You can modify the Element ID of a piece by opening its advanced properties.

**NOTE:** It is important that you use the appropriate opening and closing around the element ID. This could be (( )), {{ }}, << >>, or [[ ]] depending on the level of merge field you are creating. For more details on this refer to page 3.

### Referencing your merge field

To reference the data later using a merge field, simply type in the merge field exactly as you entered it in the element ID. The program will replace the typed in merge field with the data that is entered into the merge field source.

For example, if you wanted to insert the Walks description into a disclaimer, you would:

1. Enter {{WalksDesc}} in the Element ID of the Walks Description Piece.

**NOTE:** You have complete control over the merge field name. However, the text must be unique and you must match the spelling and case exactly when you later reference it.

2. Add the text merge field {{WalksDesc}} to the Disclaimer where you want the Walks Description to appear.

**Example:** Type the following into the walks disclaimer: The walks were {{WalksDesc}} and because of this.....

The screenshot shows the 'Rating Piece Properties' dialog box. The 'Element ID' field is highlighted with a red circle and contains the text '{{Example}}'. Other fields include 'Data ID', 'Instruction', and 'Send to Database'. Checkboxes for 'Show on Input Screen', 'Show in Printed Report', and 'Required for Completeness' are checked. There are also buttons for 'OK', 'Cancel', 'Advanced', 'Select Special Font', 'Create Unique Rating Set', and 'Send to Database'.

## Different Scopes of Merge Fields

There are 4 scopes of merge fields. The scope determines where the program should search for the data reference.

### **Inspection**

Inspection merge fields are surrounded by {{Curly Braces}}. The program will search the entire inspection for the data reference. Using this merge field you can later reference the source anywhere in the inspection.

### **Category**

Category merge fields should be surrounded by [[square brackets]]. The program will search only the current category for the data reference. Using the merge field you can only reference the source from within the same category.

### **Component**

Component merge fields should be surrounded by <<greater than and less than signs>>. The program will search only the current component for the data reference. Using the merge field you can only reference the source from within the same component.

### **Line**

Line Merge fields are surrounded by ((parentheses)). The program will search only the current line for the data reference. Using the merge field you can only reference the source from within the same line.

## Existing Merge Fields

### \*\*\*\*\* LINE \*\*\*\*\*

((Rating)) – always displays the merge field as text

((Prompt))

((Answer))

((Note))

((All Answers)) – displays all answer data for the line (ie rating followed by the description and note in a typical line from our default templates)

((Summary Prompt))

### \*\*\*\*\* COMPONENT \*\*\*\*\*

<<Name>>

<<Location>>

<<All Notes>>

NOTE: Additional formatting options are available by adding "Prompt", "New Line", "Extra Space" and "Category Name"

### \*\*\*\*\* CATEGORY \*\*\*\*\*

[[Name]]

[[Disclaimer]]

[[All Notes]]

NOTE: Additional formatting options are available by adding "Prompt", "New Line", and "Extra Space" "Category Name"

### \*\*\*\*\* INSPECTION \*\*\*\*\*

{{Current Page}}

{{Total Pages}}

{{Current Date}} (MM/DD/YY)

{{Current Date Long}} (MMMM DD, YYYY)

{{All Notes}}

NOTE: Additional formatting options are available by adding "Prompt", "New Line", "Extra Space" and "Category Name"

{{Summary Text}}

{{Body Text}}

{{Property City}}

{{Property State}}

{{Property Zip}}

{{Property CSZ}}

{{Client City}}

{{Client State}}

{{Client Zip}}

{{Client CSZ}}

## Merge fields that can only be used in conjunction with Front Office

{{Referrer CSZ}}  
{{Referrer City}}  
{{Referrer State}}  
{{Referrer Zip}}

{{Company Name}}  
{{Company Address}}

{{Company CSZ}}

{{Property Address}}  
{{Property City}}  
{{Property State}}  
{{Property Zip}}  
{{Property Directions}}

{{Amount Due}}  
{{Contact Name}}  
{{Contact Phone}}  
{{Contact Fax}}

{{Client Name}}  
{{Client Address}}  
{{Client City}}  
{{Client State}}  
{{Client Zip}}  
{{Client Company Name}}  
{{Client Home Phone}}  
{{Client Mobile Number}}  
{{Client Fax Number}}  
{{Client e-mail}}  
{{Client Notes}}  
{{Client Custom 1}}  
{{Client Custom 2}}  
{{Client Custom 3}}

{{Referrer Name}}  
{{Referrer Address}}  
{{Referrer City}}  
{{Referrer State}}  
{{Referrer Zip}}  
{{Referrer Company Name}}  
{{Referrer Home Phone}}  
{{Referrer Mobile Number}}  
{{Referrer Fax Number}}  
{{Referrer e-mail}}  
{{Referrer Notes}}  
{{Referrer Custom 1}}  
{{Referrer Custom 2}}  
{{Referrer Custom 3}}

{{Order Notes}}  
{{Order Custom 1}}, {{Order Custom 2}}.....{{Order Custom 24}}