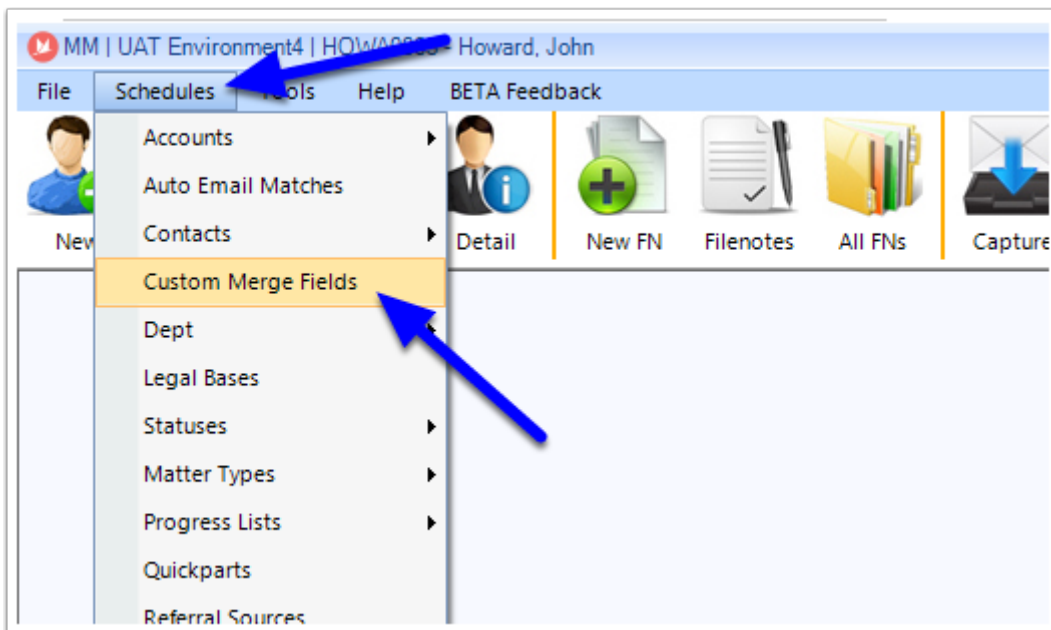


Custom Merge Fields - How to Create & Edit

When using [Letter Merge](#) Functionality, you have the ability to create your own Custom Merge Fields. These fields can be used to populate standard predefined text, or can be used to merge a particular dollar value from a Disbursement, Cost or Fee code.

1. Accessing Custom Merge Fields

From the Main Menu, select **Schedules**, then **Custom Merge Fields**.



Adding a new Custom Merge Field

1. Add a new Custom Merge Field

When the main Custom Merge Field screen appears, click the **+Add** button to add a new entry.

Field Name	Field Value
AFP National Police Cert Charge	
Disclosure of Interests List of Firms	
English Language Test Charge	
Fee For Copy Of File	
Health Examination Charge	
Health Insurance	
Hourly Rate When Client Breaches Contract	
Min Fee Charged On Cancellation	
Overseas Police Check Charge	
SignatureBlock	«ResponsibleGivenNames» «ResponsibleSurname» Migration Agents Registration No «ResponsibleRefNo»
Translation Fee (per page)	
Visa Label Charge	

Key: This field is used by MM Templates

More Add Close

2. Enter the Field Name

Enter the name that you would like as the Merge Field in the **Field Name**.

New Custom Merge Field

Field Name:

Field Value:

☒ Use the Value from this Disbursement Code:

☐ Use the Value from this Cost Code:

☐ Use the Value from this Fee Code:

☐ Use the Following Text:

Add Merge Field:

3. Select what value you would like to populate for this Merge Field

3.1. Creating a predefined text merge Field.

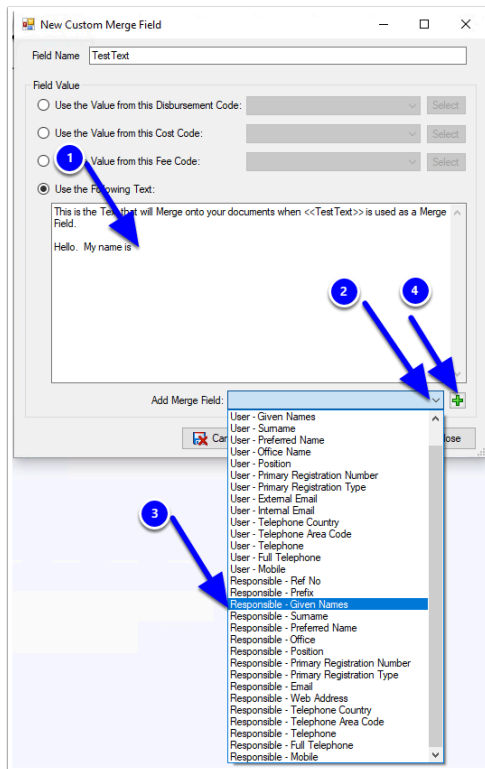
If you would like the Merge Field to simply populate a block of predefined Text, then:

- Select **Use the Following Text**.
- Enter the predefined text in the **Text Window**.

The screenshot shows a window titled "New Custom Merge Field". It has a "Field Name" input field containing "TestText". Below this is a "Field Value" section with four radio button options: "Use the Value from this Disbursement Code:", "Use the Value from this Cost Code:", "Use the Value from this Fee Code:", and "Use the Following Text:". The "Use the Following Text:" option is selected. Below the radio buttons is a large text area containing the text: "This is the Text that will Merge onto your documents when <<TestText>> is used as a Merge Field." At the bottom of the window, there is an "Add Merge Field:" dropdown menu and a green plus button. At the very bottom are three buttons: "Cancel", "Save & New", and "Save & Close". Two blue arrows are overlaid on the image: one points to the "Use the Following Text:" radio button, and the other points to the text area.

You can also add predefined Merge Fields to your text block. To do so:

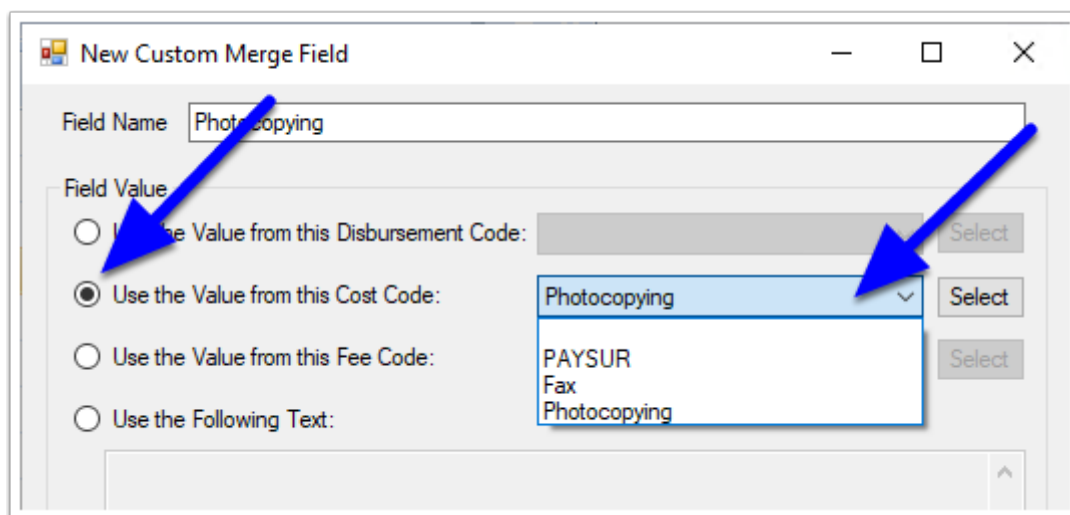
1. Move your cursor to where you would like the Merge Field inserted in your text block.
2. Select the drop-down arrow next to '**Add Merge Field**'.
3. Select the **Merge field** you would like.
4. Click the + 'Add' button.



3.2. Linking the Merge Field to a Disbursement, Cost or Fee code

If you would like to link the Merge Field to a Disbursement, Cost or Fee, then:

- Select if your charge is a **Disbursement, Cost** or **Fee**.
- Select the required code from the **dropdown**.

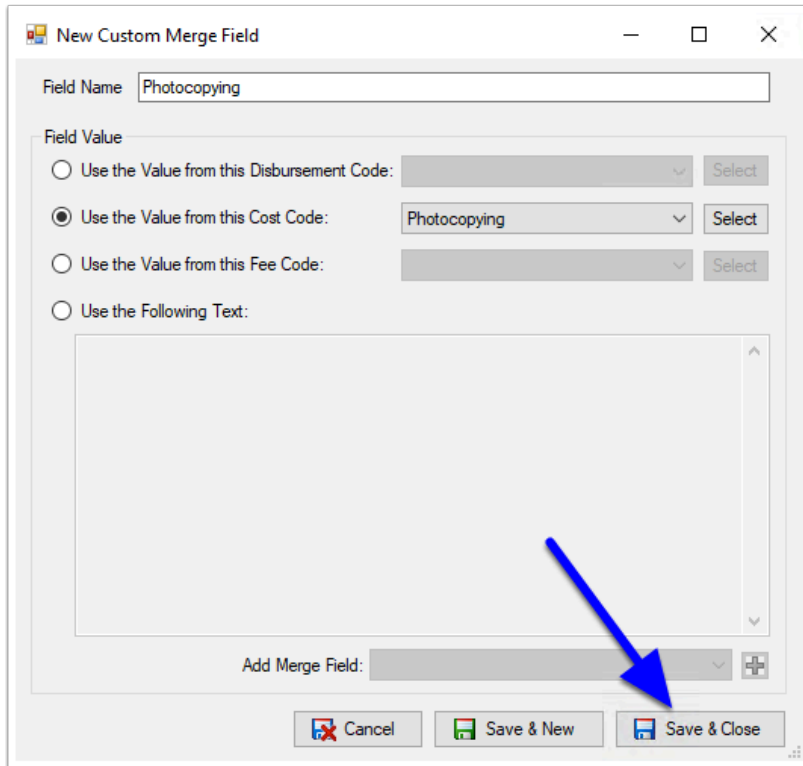


If you need to create a new Disbursement, Cost or Fee code, you can click the **Select** button to create new codes.

For Full Details on how to create new Disbursement, Cost or Fee codes, see [Accounts Setup](#).

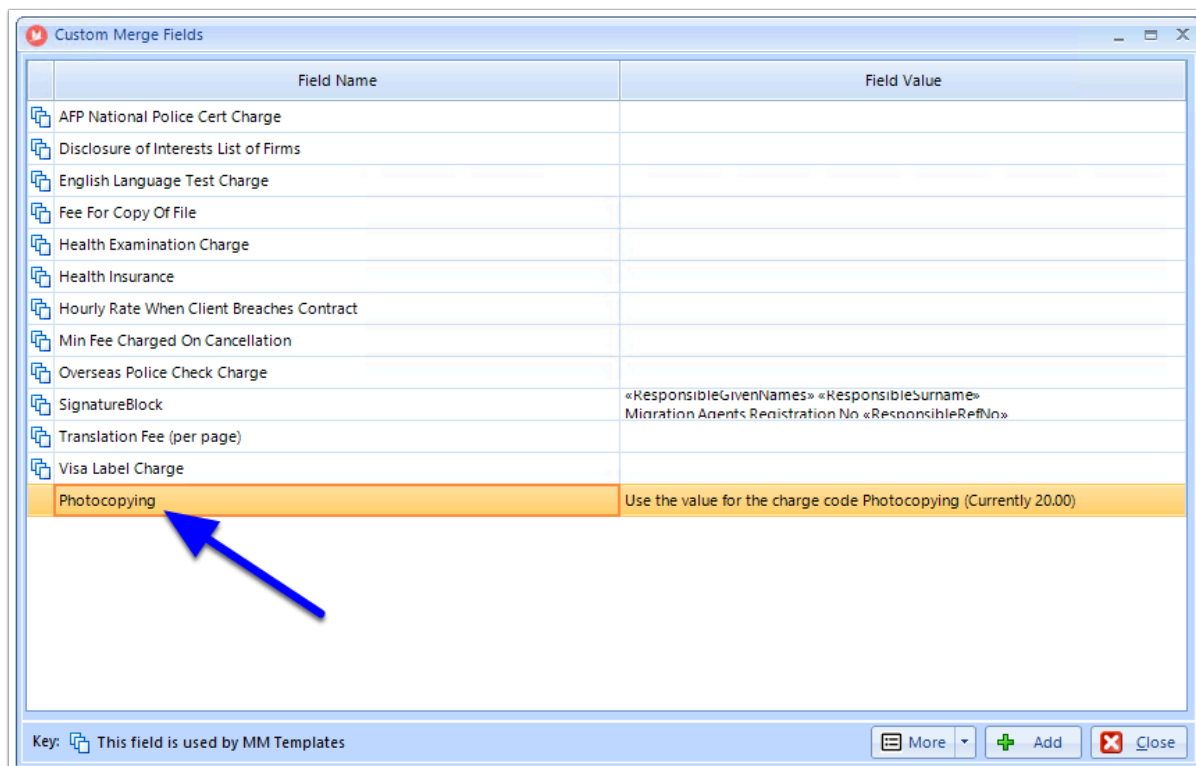
4. Save & Close

1. Once the merge Field Name and Field Value have been selected, click **Save & Close** (or **Save & New** to create another Custom Merge).



The screenshot shows a window titled "New Custom Merge Field". It has a "Field Name" text box containing "Photocopying". Below it, under "Field Value", there are four radio button options: "Use the Value from this Disbursement Code:", "Use the Value from this Cost Code:" (which is selected), "Use the Value from this Fee Code:", and "Use the Following Text:". Each of the first three options has a dropdown menu and a "Select" button. The "Use the Following Text:" option has a large text area below it. At the bottom of the dialog, there is an "Add Merge Field:" section with a dropdown menu and a plus icon. At the very bottom, there are three buttons: "Cancel", "Save & New", and "Save & Close". A blue arrow points to the "Save & Close" button.

The Custom Merge Field will now display.



Editing or Deleting Custom Merge Fields

To Edit or Delete a Custom Merge Field, simply **highlight the Field**, then **Right-Click** to select either **Edit** or **Delete**.

