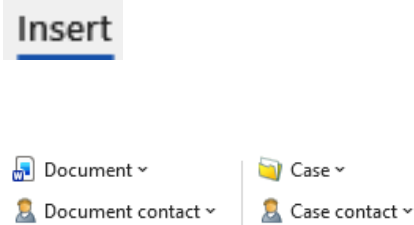



Merge fields in Word

| <p>This guide describes how to insert Workzone merge fields into a Word document and have the fields populated.</p> | | |
|---|---|--|
| Instruction | Explanation | Navigation |
| <p>Open Word</p> | <p>Open a Word document</p> <p>Link the document to a Workzone case</p> | |
| <p>Insert Merge Field (Standard Fields)</p> | <p>Place your cursor in the document where you want to insert a merge field</p> <p>Click the Insert tab</p> <p>Select the merge field you want to insert</p> <p>You can choose from the following:</p> <ul style="list-style-type: none"> • Document - fields on the document page, e.g., title, document date • Document Contact - if you have linked a party to the document, you can merge, e.g., name or address • Case - fields on the case page, e.g., title, case number, case handler • Case Contact - the parties in the case, e.g., name, address, country code |  |
| <p>Insert Merge Field (Custom Fields)</p> | <p>If you want to insert custom fields such as AUCPR, AUID, Grantor 1, select Custom Fields</p> <p>For example, if you want to insert the merge field AUCPR from the case party with the role Case Party, select:</p> <p>Case Contact -> Custom field -> Unique -> AUCPR -> Case Party</p> | |

| | | |
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| Merge | Click the Home tab Click Merge to populate the fields with data from Workzone. |  <p>The screenshot shows the 'Home' tab selected in a ribbon interface. Below the 'Home' tab, the 'Merge' button is visible, which includes a small icon of a document with arrows and a dropdown arrow to its right.</p> |
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