
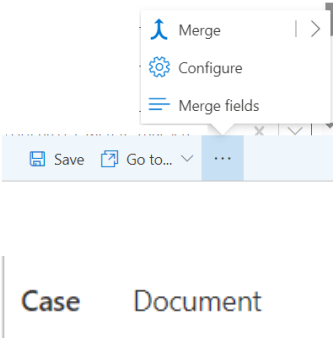


Merge fields in Word via Workzone 365

This guide describes how to insert Workzone merge fields into a Word document via Workzone 365 (WZ365) and have the fields populated.

Instruction	Explanation	Navigation
<p>Open Word</p>	<p>Open a Word document.</p> <p>Click the WZ365 button.</p>	 <p>WorkZone</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 on the three dots in WZ365 and select Merge Fields.</p> <p>Select the merge field you wish to insert. You can choose from the following:</p> <ul style="list-style-type: none"> • Case – data from the case e.g., title, case number, case handler. • Document – data from the document, e.g., title, document's letter date. <p>Note: It is not possible to insert a merge field from the case parties or document parties via WZ365. In order to do so, you must use Workzone for Office plug-in.</p>	
<p>Insert merge field (custom)</p>	<p>Note: It is not possible to insert custom fields such as AUID, or AUCPR via WZ365.</p> <p>In order to do so, you must use Workzone for Office plug-in.</p>	
<p>Flet</p>	<p>Before you can merge data into the fields, the document must be saved to a Workzone case.</p> <p>Click on the three dots in WZ365 and select Merge.</p> <p>Fields inserted via WZ365 and/or Workzone for Office will be merged into the document.</p>	<p>Case</p> <p>Select case</p> 