
MERGE DOCUMENTS

Overview

A merge document is created using WordPerfect or Microsoft Word just like you would create any other type of document using those programs. The difference lies in the ProForm field references that are included in the document. When it is merged with a ProForm data file, the data from the fields that are referenced in the document are inserted in place of the field references.

For example, this is how a reference to the Settlement Date: field (from the File No., Settlement Dates, Notes screen of the General Tab) would appear in a merge document:

{{settdate}}

When the document is merged with a ProForm file, the data in the Settlement Date: field in the current ProForm data file would be entered in the merge document at any point where **{{settdate}}** appears. All of the field references contained in the document would be replaced by the actual data from the current ProForm data file.

After creating the merge document it is recommended that it be saved to the Merge folder inside the SoftPro directory. If you are on a network and wish for all other users to have access to the created merge document, save it to the Merge folder inside the SoftPro directory on the server. After you create and save a WordPerfect or MS Word merge document, it needs to be added to its respective User Merge Documents Tree using the respective Documents Manager in ProForm. This notifies ProForm of the new document available for merging with ProForm files.

Once this one-time set up is completed for a new document, it is ready to be used with any ProForm file. To merge a document with any open file, select **File > WordPerfect Merge** or **MS Word Merge** and locate the created document in the User Merge Documents Tree.

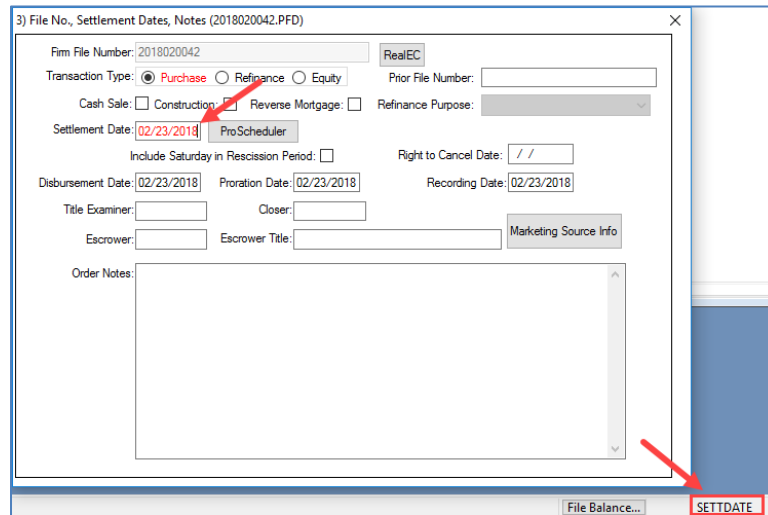
Note for Microsoft Word Users: Once you have completed installation of the SoftPro for Windows programs, you must then install the SoftPro Merge Macro on each computer to be used to merge with Microsoft Word. The SPWINMRG Word Macro, written by SoftPro and included on your SoftPro CD, must be installed in Microsoft Word's Normal template so that it is available each time Word is executed. This is a one-time procedure and does not need to be repeated unless you upgrade or reinstall Microsoft Word. **You can find instructions on our F1 Help Website. Press F1 from anywhere in the application and search for "Macros".**

Creating a Merge Document

To begin creating your merge document, you will need to open a new Word or WordPerfect document (or an existing template) along with the ProForm application.

Identifying Field Codes in ProForm:

Any ProForm data field can be referenced in your WordPerfect or MS Word merge documents. Each data field in ProForm has a unique **Field Code** assigned to it. The **Field Code** for the active field in ProForm is indicated in the **Status Bar** on the right-hand side of the screen. To determine the **Field Code** for a specific field in ProForm, place the cursor in the field and look to the **Status Bar**. The **Field Code** for the active field will be displayed.



The screenshot shows a window titled "3) File No., Settlement Dates, Notes (2018020042.PFD)". The form contains several fields: Firm File Number (2018020042), Transaction Type (Purchase selected), Cash Sale (Construction checked), Settlement Date (02/23/2018), Disbursement Date (02/23/2018), Proration Date (02/23/2018), and Recording Date (02/23/2018). A red arrow points to the Settlement Date field. At the bottom right, the status bar displays "File Balance..." and "SETTDATE". Another red arrow points to the "SETTDATE" field code.

A complete listing for every field in each screen of ProForm is available on the SoftPro for Windows installation CD. These files can be found in the Tools/Screens folder of the CD. Each file pertains to the screens and fields for a specific tab in ProForm which can be printed out for quick reference when creating a merge document.

Inserting ProForm Field References:

Any ProForm data field can be referenced in your WordPerfect or MS Word merge documents. When you merge a document with a ProForm data file, the contents of the fields you reference are inserted into the document along with any special formatting you specify. Refer to Formatting Options hereinbelow for an explanation of how to control the format of information merged. Type ProForm field references into your merge document using the following format:

{{fieldcode}}

double-brackets field code double-brackets

In the example above, the contents of the Settlement Date: field in the current data file replaces the field reference in the merge document when they are merged:

*The settlement date is {{settdate}}. **Translates to**
The settlement date is 02/23/2018.*

Formatting Options for Field References:

Formatting options that perform a variety of functions can be added to field references in WordPerfect or MS Word merge documents. There are formatting options for Address fields that include spelling out state names from two-letter state abbreviations. Date field options include spelling out the month name in a date that is in MMDDYY format and adding suffixes such as 1st, 2nd, 3rd to dates. Name field options allow extraction of a portion of the name such as first, middle and/or last name from a full name and the addition of a prefix or suffix. Numeric field options allow you to spell out dollar amounts, remove commas from amounts greater than 999, specify the number of decimal places, enclose an amount in brackets and to fill a dollar amount field with asterisks or dashes (used to fill in amounts on checks). Options available for all fields allow you to change text to all uppercase and to print a blank, a "0" or "N/A" if the referenced field contains no data.

With formatting options, you can specify how the data that is pulled from a SoftPro field is to appear. To add a formatter to a ProForm field reference in your merge document, use the following format:

{{fieldcode}formatter}}

double-brackets field code single bracket formatter double-brackets

For example, you can have the settlement date spelled out by including the sp formatting option as shown below:

{{SETTDATE}sp}}

If applicable, you can add multiple formatting options to a field reference. Separate each option with a blank space, {{fieldname}option1 option2}}. Always close a field reference with double brackets.

*The settlement date is {{settdate}sp}}. **Translates to**
The settlement date is February 23, 2018.*

Address Field Formatting Options:

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
CITY	City	{{LENADR2}CITY}}	Raleigh, NC 27609	Raleigh
STATE2	State Abbreviation	{{LENADR2}STATE2}}	Raleigh, NC 27609	NC
STATE	Full State Name	{{LENADR2}STATE}}	Raleigh, NC 27609	North Carolina
SNAME	Full State Name (as entered in the State field)	{{STATELET}SNAME}}	NC	North Carolina
ZIP	Zip Code	{{LENADR2}ZIP}}	Raleigh, NC 27609	27609

Examples:

In the following table of examples, assume that the lender address is **1 First Street, Raleigh, NC 27609**:

Text with Field Reference	Result
The lender is located at {{LENADR1}}, {{LENADR2}}.	The Lender is located at 1 First Street, Raleigh, NC 27609.
The lender is located in {{LENADR2}STATE}}.	The Lender is located in North Carolina.

Date Field Formatting Options:

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
MS	Month	{{SETTDATE}MS}}	02/23/2018	February
MT	Month Number w/ Suffix	{{SETTDATE}MT}}	02/23/2018	2nd
M1	Month Number (One-Digit)	{{SETTDATE}M1}}	02/23/2018	2

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
M2	Month Number (Two-Digits)	{{SETTDATE}M2}}	02/23/2018	02
D1	Day Number (One-Digit)	{{SETTDATE}D1}}	02/23/2018	23
D2	Day Number (Two-Digits)	{{SETTDATE}D2}}	02/23/2018	23
DT	Day number w/ Suffix	{{SETTDATE}DT}}	02/23/2018	23rd
Y2	Two-Digit Year	{{SETTDATE}Y2}}	02/23/2018	18
Y4	Four-Digit Year	{{SETTDATE}Y4}}	02/23/2018	2018
SP	Month Day, Year	{{SETTDATE}SP}}	02/23/2018	February 23, 2018
ST	Month Day w/ Suffix, Year	{{SETTDATE}ST}}	02/23/2018	February 23 rd , 2018
SR	Day w/ Suffix of Month, Year	{{SETTDATE}SR}}	02/23/2018	23 rd day of February, 2018

Examples:

In the following table of examples, assume the settlement date is **March 1, 2018**.

Text with Field Reference	Result
The settlement date is {{SETTDATE}}.	The settlement date is 03/01/2018.
The settlement date is {{SETTDATE}SP}}.	The settlement date is March 1, 2018.
The settlement date will be in {{SETTDATE}MS}}.	The settlement date will be in March.

Name Field Formatting Options:

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
NFIRST	First Name	{{BYR1NAM1}NFIRST}}	John Thomas Smith	John
NMIDDLE	Middle Name	{{BYR1NAM1}NMIDDLE}}	John Thomas Smith	Thomas
NLAST	Last Name	{{BYR1NAM1}NLAST}}	John Thomas Smith	Smith

Examples:

In the following table of examples, assume that the first Buyer/Borrower name is **John T. Smith**:

Text with Field Reference	Result
The Buyer is {{BYR1NAM1}}.	The Buyer is John T. Smith.
Dear Mr. {{BYR1NAM1}NLAST}}:	Dear Mr. Smith:

Numeric Field Formatting Options:

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
NOCOMMA	Removes commas	{{LOANAMT}NOCOMMA}}	200,000.00	200000.00
WORDS	Spells out a dollar amount in check format	{{LOANAMT}WORDS}}	200,000.00	Two Hundred Thousand and 00/100
WORDS	Spells out numeric amounts	{{LOANAMT}WORDS}}	200,000.00	Two Hundred Thousand
BRAC	Places brackets around POC amounts	{{B803}BRAC}}	450*00	[450.00]
FILL	Fills field with astericks or dashes	{{LOANAMT}FILL}} {{LOANAMT}WORDS FILL}}	200,000.00	*****200,000.00 --Two Hundred Thousand and 00/100-----



- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
#	Indicates total number of decimal places to include	{{INTRATE}2}}	4.125	4.13

Examples:

In the following table of examples, assume that the Contract Sales Price is **200,000.00** and the Annual Interest Rate is **4.125**:

Text with Field Reference	Result
The sales price is \${{SALEPRIC}}.	The sales price is \$200,000.00.
The sales price is \${{SALEPRIC}NOCOMMA}}.	The sales price is \$200000.00.
The interest rate is {{INTRATE}}%.	The interest rate is 4.125%.
The interest rate is {{INTRATE}4}}%.	The interest rate is 4.1250%.

Formatting Options for All Fields:

Formatting Option	Explanation	Field Code w/ Formatting Option	Data in ProForm Field	Result
ZERO	Generates a zero if the ProForm field is blank	{{INTRATE}ZERO}}		0.00
N/A	Generates a zero if the ProForm field is blank	{{INTRATE}N/A}}		N/A
BLANKS	Generates a blank line if the ProForm field is blank	{{INTRATE}BLANKS}}		_____
UCASE	Generates text in all caps	{{BYR1NAM1}UCASE}}	John T. Smith	JOHN T. SMITH

Examples:

In the following table of examples, assume that the Annual Interest Rate field is blank:

Text with Field Reference	Result
The interest rate is {{INTRATE}N/A}}%.	The interest rate is N/A%.
The interest rate is {{INTRATE}BLANKS}}%.	The interest rate is _____%.

Using Expressions:

In merge documents, expressions can be used to perform calculations or display data in different ways. Expressions can be used to perform calculations using numeric constants, ProForm fields, or both. An expression can be as simple as 1+1. If entered in a merge document, the expression {{1+1}} would be replaced by 2 when printed.

Or, you can use ProForm field names in an expression. A field name is replaced by the amount in that field in the current data file. For example, the expression {{SALEPRIC-LOANAMT}} would be replaced by the value of the difference between the sales price and loan amount in the current file.

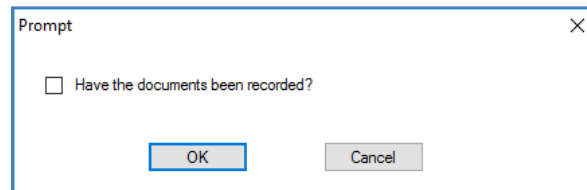
Inserting Prompts:

In addition to field references, prompts can be embedded into merge documents. A prompt is used to ask the user to enter information that may not be included in the data file. Prompts appear to the user during the merge.

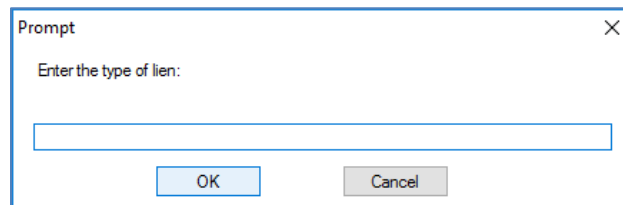
Prompt Format	Definition & Example
{{CHECK prompt}}	Prompts the user for verification. {{CHECK Have the documents been recorded?}}
{{CHAR prompt}}	Prompts the user to enter information in a text field. {{CHAR Enter the type of lien:}}
{{FT prompt}}	Prompts the user to enter information in a scrollable field. {{FT Enter a legal description for the property:}}
{{NUMBn prompt}}	Prompts the user to enter a numeric value. Replace the “n” with the number of decimal places the prompt will allow. {{NUMB2 Enter the amount of the lien:}}
{{DATEn prompt}}	Prompts the user to enter a date. Replaces the “n” with 2 for a two-digit year or 4 for a four-digit year. {{DATE4 Enter the date of recording:}}

Prompt Format	Definition & Example
{{TIME prompt}}	Prompts the user to enter a time. {{TIME Enter the time of recording:}}
{{SSN prompt}}	Prompts the user to enter a Social Security Number. {{SSN Enter the seller's SSN:}}
{{PHONE prompt}}	Prompts the user to enter a phone number. {{PHONE Enter the seller's phone number:}}
{{ZIPn prompt}}	Prompts the user to enter a zip code. Replace the "n" with a 4 to allow for a five-digit zip code with a four-digit extension. Do not use a 4 for no extension. {{ZIP Enter the property zip code:}}

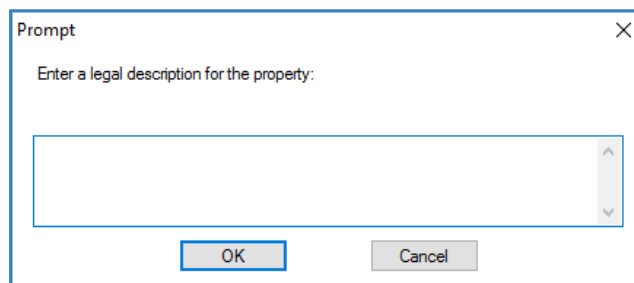
The prompt appears when the document is merged with a ProForm file. The user enters the response in the prompt dialog box. Below are examples of the prompt dialog boxes:



CHECK prompt



CHAR prompt



FT prompt

Prompt ✕

Enter the amount of the lien:

OK Cancel

NUMB prompt

Prompt ✕

Enter the date of recording:

OK Cancel

DATE prompt

Prompt ✕

Enter the time of recording:

OK Cancel

TIME prompt

Prompt ✕

Enter the seller's SSN:

OK Cancel

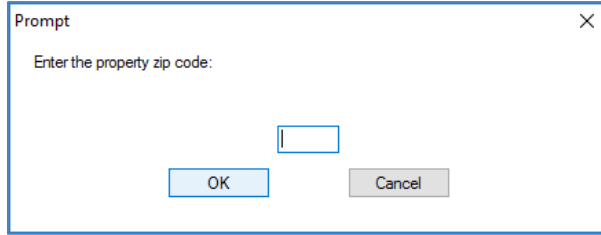
SSN prompt

Prompt ✕

Enter the seller's phone number:

OK Cancel

PHONE prompt



ZIP prompt