

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Use Merge Fields

This step by step How To article explains what merge fields are and how to work with them.

For a complete list of available How To documents, visit the Support section of our website: www.palm-tech.com/support/

HOW TO: Use Merge Fields

Merge fields allow you to enter text and have the program replace the text with data from another part of the inspection. For example, if you want the property address to appear in a disclaimer, you would add the merge field {{Property Address}} to the disclaimer. The program will replace the merge field text, {{Property Address}}, with the actual property address entered in General Information when the report is printed.

You can place merge fields in prompts, answers, disclaimers, final comments, lines, or put them into lists for easy selection.

Creating Your Own Merge Field

With Inspection Designer you can create your own merge fields using the Element (Piece) ID property. To create a merge source, give a piece an Element ID, making sure to add opening and closing braces to the Element ID. You can then reference the data entered in that piece in the other parts of the inspection by typing that Element ID surrounded by braces.

For example, if you wanted to insert the Walks description into a disclaimer, you would give the Walks Question/Answer piece an Element ID such as {{WalksDesc}} and then add the text merge field {{WalksDesc}} to the Disclaimer where you want the Walks description to appear.

NOTE: The Wording of the Element ID text itself is not important. It is, however, important that the text is unique and that you match the spelling and case exactly when you add the merge field.

Merge Field Scopes

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

Line- Line Merge fields are surrounded by ((parentheses)). The program will search for the data reference.

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.

Category - Category merge fields should be surrounded by [[square brackets]]. The program will search only the current category for the data reference.

Inspection - Inspection merge fields are surrounded by {{Curly Braces}}. The program will search the entire inspection for the data reference.

HOW TO: Use Merge Fields

The following is a listing of built in merge fields that are predefined in the programs and/or the default template set.

Line

((Rating)) – 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", "Extra Space" and "Category Name"

Inspection

{{Property City}}

{{Property State}}

{{Property Zip}}

{{Property CSZ}}

{{Client City}}

{{Client State}}

{{Client Zip}}

{{Client CSZ}}

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

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

{{Body Text}}

HOW TO: Use Merge Fields

{{Current Page}}

{{Total Pages}}

{{All Notes}}

{{Summary Text}}

NOTE: Additional formatting options are available by adding:

"Prompt", "New Line", "Extra Space" and "Category Name"