PDspect
INSPECTION SOFTWARE

Step by Step

How To

Use Merge Fields

This How To article explains what merge fields are and how they work.

Merge fields allow you to enter text that the program will replace 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 fields

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 other parts of the inspection by typing in 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 (each Element ID can only be used once in a template) 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 only the current line 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.

Predefined 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}}

{{Current Page}}
{{Total Pages}}

{{All Notes}}
NOTE: Additional formatting options are available by adding:
"Prompt", "New Line", "Extra Space" and "Category Name"
{{Summary Text}}