## **SmartAdvocate**<sup>®</sup>

## Tip of the Week

Did you know that you could create your own merge codes for your User Defined Fields (UDFs)?

Although SmartAdvocate has an unprecedented number of predefined 'regular' merge codes (parties' names, incident date, medical provider, treatment date, insurance company, etc.), it is possible you may want to have data entered in UDFs, merged into your finished documents. Let's say you have created a UDF for the tire manufacturer on the Case UDF page and wanted to have the data entered in those fields merged into your finished documents, you could do so using Dynamic Merge Codes. Here's how:

- 1. Click on the Admin tab on the top tool bar in SmartAdvocate
- 2. Select UDF Editor from the dropdown list
- 3. Select the CaseType you want to work with
- You will see displayed a list of the UDFs that have been created for that CaseType.
- 4. Selected the edit function for the UDF you want to work with (Edit will be available in the far- right column)
- 5. In the displayed dialogue box, enter a name in the 'Short Name' field. The 'Short Name' entered here will be your merge code for this field.

Figure 1	Figure	1
----------	--------	---

Sn	nartAdvocate' Cases: O Open O Closed (	) All Case # /	Plaintiff	. 🥰 😧						0	Welcome Claude
	ent Cases 👻 Case Wizard Case Browse Contacts 👻 D				rites + Help I						
	Case Type UDFs O Incident Type UDFs Case Type: Auto /	Accident									
				UDFs							Export 💹 🔀 🕻
8	UDF Name					9 Screen	Ŷ		P Active		
						Ψ	Ŧ		9 v		
	Tire Manufacture							Text	1	24	
	Tire Size in inches	Udf Definition				23		Number	1	25	
	Witness Explaination	Text*	Tire Manufacture					Comments	1	26	
	Vehicle Information		The Handraccore					Text	1		
	Weather Conditions	Type*	Text	Screen*	Case	-		Comments	1	28	
	Road Conditions	Short Name	TIRE		🔲 Display in single	e column		Comments	1	29	
	Special conditions	Order*	24 🗘		Active			Comments	1	30	
	Something about the car				ok	Canal		Multiselect	1		
	How was the weather?				OK.	Cancer		Multiselect	1	32	
	Storage Box					Case		Text	1		
	Weather Condition					Case		Text	1	34	
	What direction were you traveling in when the problem happened?					Case Wizard		Single select	1	1	
	How many people were in your vehicle?		Al <u>Case # / Panett</u> <b>i i i i i i i i i i</b>								
	Were you the driver or a passenger of the car?	ser i con Cone i a i rent i re									
	If you were a passenger, were you sitting in the front or back of the		4								
	Were you rear ended?					Case Wizard		Single select	S.	5	
	If you were NOT rear-ended, did you make contact with another veh	icle or did anothe	r vehicle make contact with you?			Case Wizard		Single select	1	6	
	Were you wearing a seatbelt?					Case Wizard		Single select			
	If the police were at the scene, what is the name of the police depart	tment?				Case Wizard		Text		8	
	Who does the Police Report say was at fault?					Case Wizard		Text		9	

Now, when creating or editing your template, when you select Merge Codes from the SmartAdvocate tool bar, and select the 'Dynamic Merge Codes' option, your list of UDF based merge codes will display.

## Figure 2

File Home Insert Design Layout References Mai		SmartAdvocate ${\cal P}$ Tell me what you want to do			A. Share
Open         Save         Save         Edit As         Date and Prompt Barcode Merge Do Time         Codes         B	Letterhead Paralegal Initials P Firm Attorney Case Number N Attorney Initials Firm Name A	efix First Name He/She/It Incident Date Name ame Last Name Him/Her/It Medical Provider Attorn ddress Date of Birth His/Her/Its Medical Provider Address Adjust	Insurance Judi ney Name Law Firm Cou ter Law Firm List	ge Name Index # Config	
Template broot	Popular Marge Codes  Insert Merge Code(s)  Regular Marge Code  Co-4-L8T-40TE Co-4TATUS Co-4TATUS Co-4TATUS COURT-UCP DEF-UCP EXF-UCP E	Plantiff Merge Codes Dr Codes Portage Codes Description Last Case Note of Specific Type Case Status Case Status Coart COF Coart COF Coart COF Description Descrip	efendant Merge Codes	Court Merge Codes	
	Merge Code Parameter	Description			
	Tire Size TIRE	The Size in Inches The Manufacture Waterse Residentiates			
	ABMUL Eyes	If you went to the hospital, how did you get to the hospital? Are There Eye Witnesses?			
	Dosage Balance	At what dosage? Balance \$			
	Using Prescribed Medication	Have you using prescribed medication at the time of the accident?			
	Insert Selected Merce Code	Instart Salacted Marca Code and Hide Dials	00		

Insert your Dynamic Merge Codes into your Templates the same way you insert any other regular merge code.