SmartAdvocate®

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:
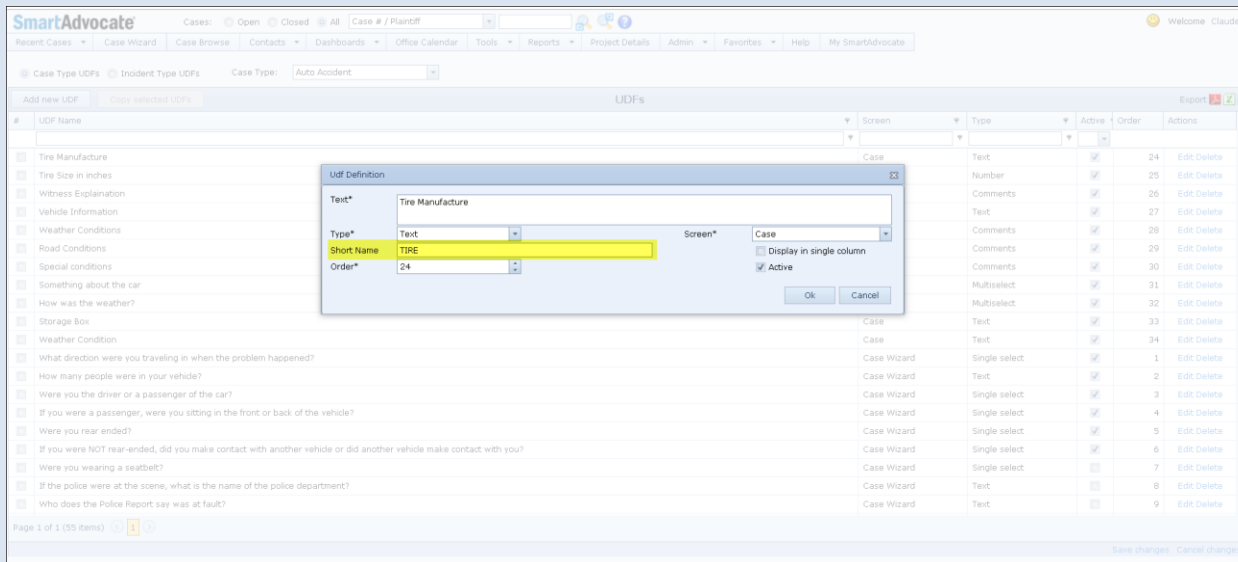
1. Click on the Admin tab on the top tool bar in SmartAdvocate

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)
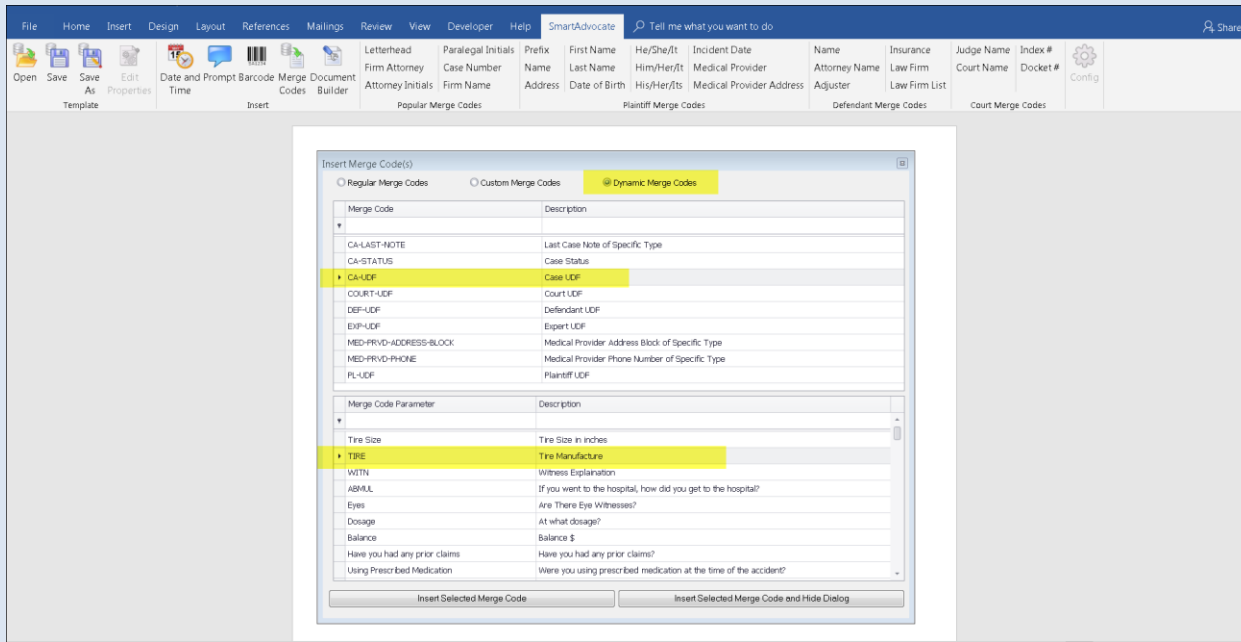
5. In the displayed dialogue box, enter a name in the 'Short Name' field. The 'Short Name' entered here will be your merge code for this field.

Figure 1

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

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