This guide is written with the assumption you have already mastered the basics of using the document editor covered in QRA – Document Editor Fundamentals.

In this tool, you will learn how to insert Merge Fields and create Merge Blocks.

- A Merge Field is data that can be pulled from your Lumens database into a template (dynamic text)
- A Merge Block allows you to create a section in the document where the merge fields will be repeated multiple times based on the data, producing a final document with multiple lines of information. (ie: Invoice a company for multiple student registrations, or pull an instructor contract with multiple classes for one instructor)
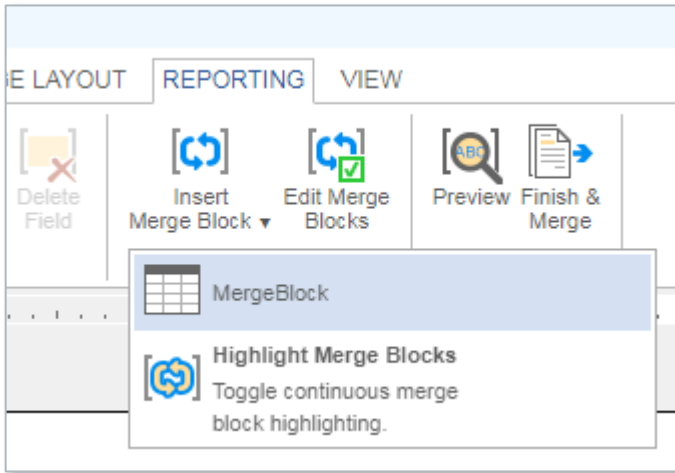
1. INSERT MERGE FIELDS:
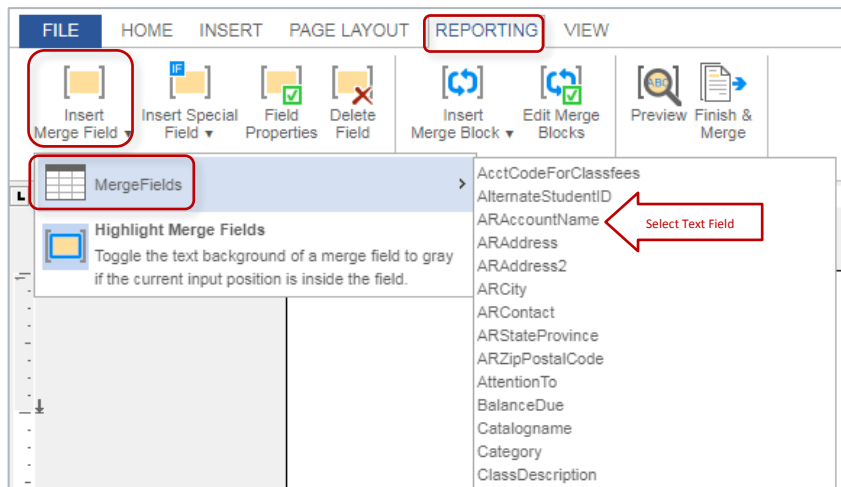
Launch the Document Editor tool and select an existing template or create a New Document.

To add a merge field click on Reporting > Insert Merge Field > Customer > Merge Fields > select the desired field. When text and merge fields have been added, click *Update Template (if updating an existing template)* or *Save as Template (if creating a new document the first time you save it)* to Save your changes. (NOTE: We recommend you save your document frequently rather than waiting until it is completely done.)
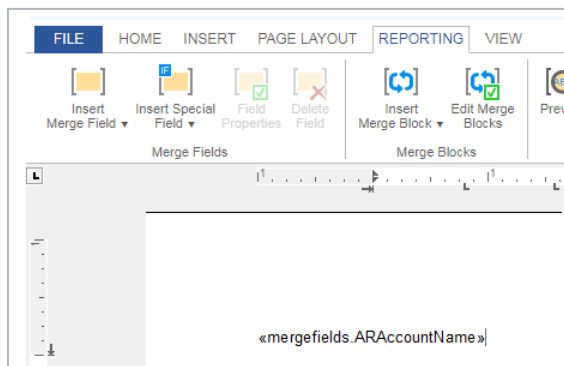
2. INSERT MERGE BLOCK:

To insert a merge block into the template click on Reporting > Insert Merge Block

- Select fields to be included in the merge block.

HINT: It is not necessary to select *every* field. We recommend you **always** select the first field that will be used in the merge block and any other fields that are relatively close in the alphabetical list and, therefore, can be easily rearranged for ordering. As a minimum, select at least one field for each column you want in the table.

- Use the up and down arrows to arrange the fields in the order the fields should appear.
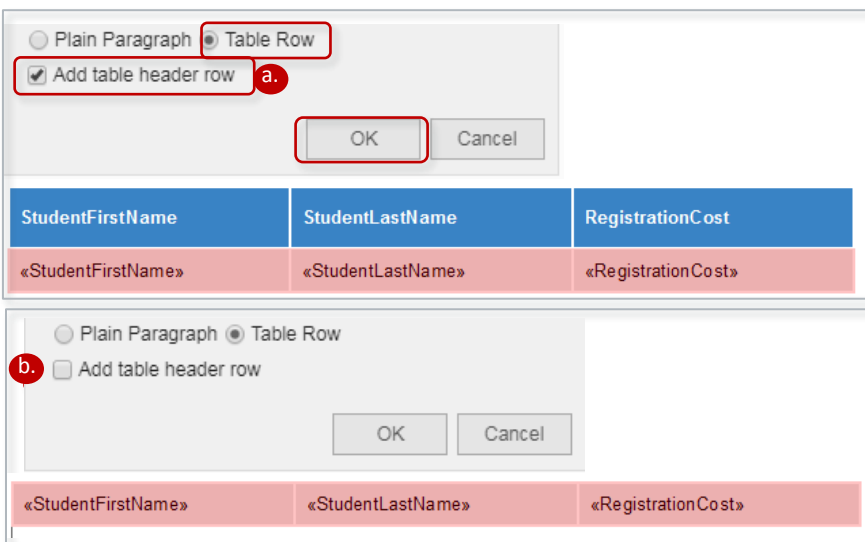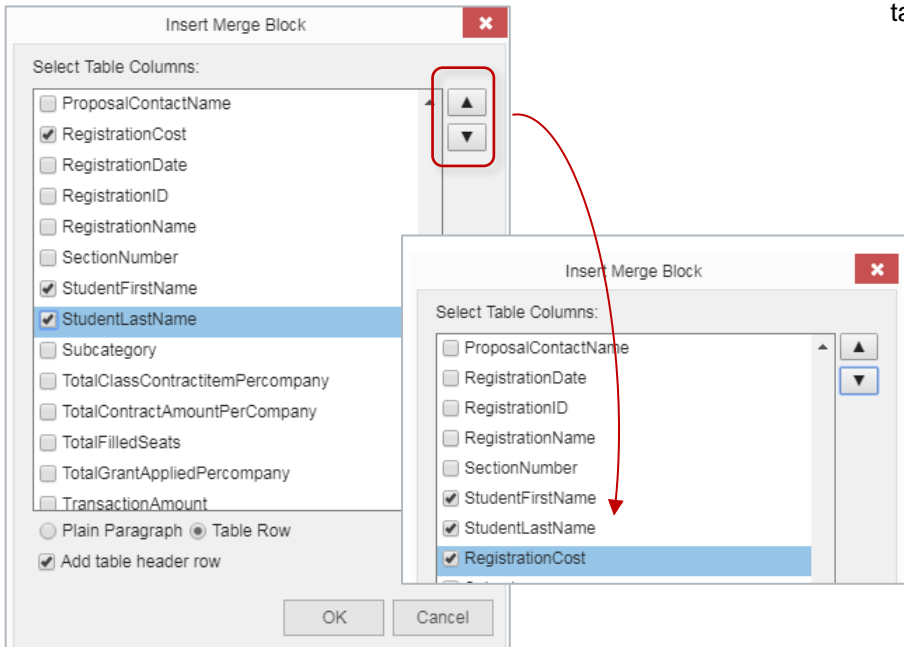

3. MERGE BLOCK STYLES:

a. **Table with header row**—by default, the merge block is created as a table with a header row.

b. **Table without header row**--to get this display option, **Uncheck** the *Add table header row*
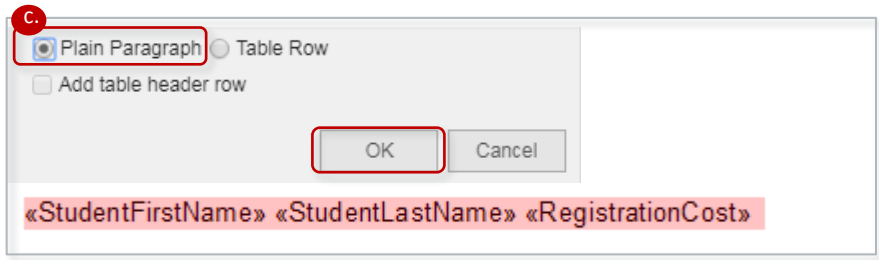
c. **Plain Paragraph**-- **Uncheck** the *Add table header row,* then check **Plain Paragraph**. Fields are inserted in with a space between each field. Each field can be treated like a single word and moved within the text as needed using spaces, tabs, enter, etc. Use this option when you want the fields to appear in a paragraph structure rather than in a table.
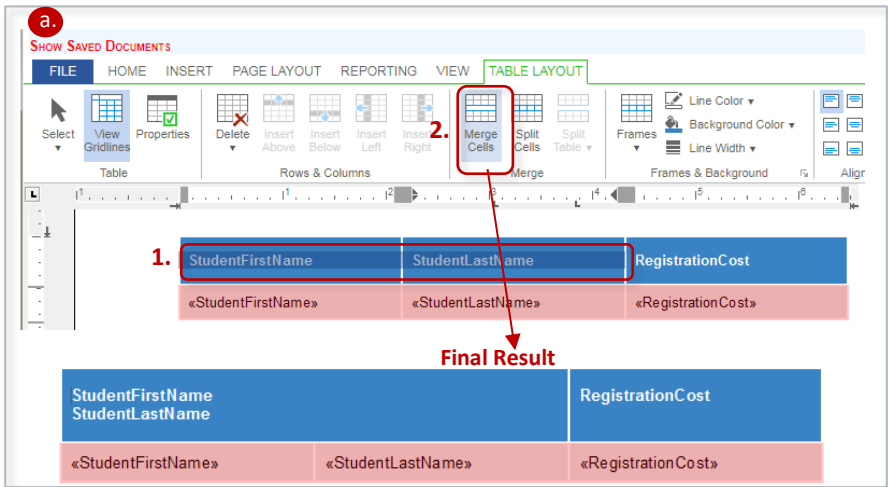
4. TABLE ADJUSTMENTS:

Once the table is created, some adjustments may be needed. These are common adjustments you may find helful.


Final Result

a. Merge cells/columns
The merge block creates a table with each cell in a separate column. You can merge columns if you want multiple merge fields to appear in one column. (Repeat for the next row.)

b. Edit column headers
Column headers are simply text and can be edited like any other text you add to the template.
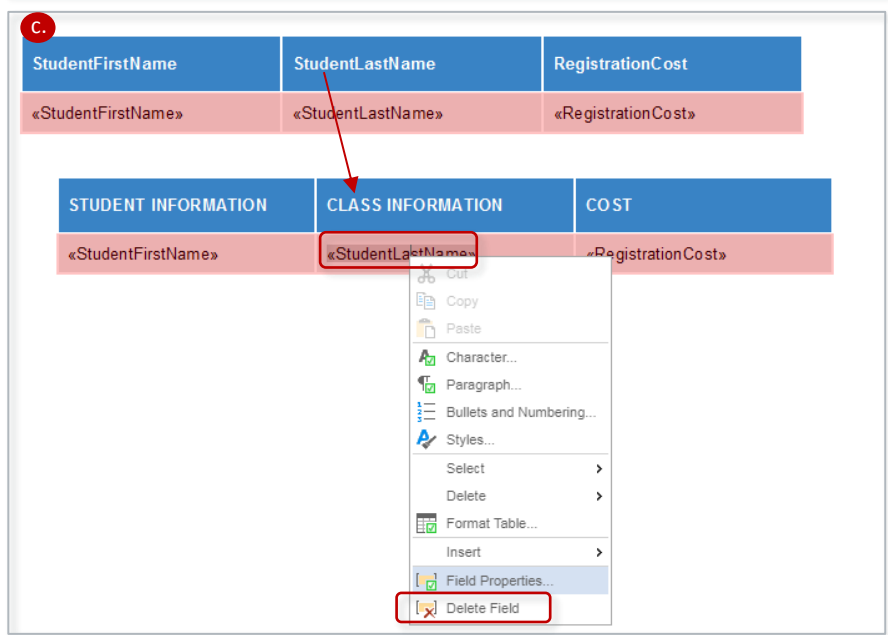
c. Re-purpose a column
If the table is created with the correct number of columns, but not necessarily the correct fields in each column, this can be corrected.
  – Edit the column heading.
  – Delete the merge field by right clicking and select Delete Field.
  – Insert appropriate merge field to coincide with new column heading.
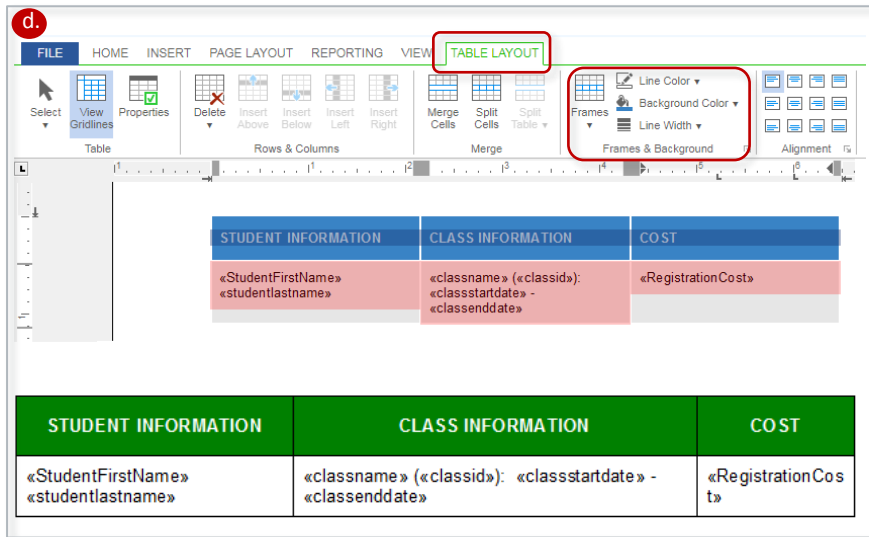
d. Edit table format
Select the column header table row to acces the Table Layout menu, which allows common formatting such as:
  – Adjust column width
  – Create borders/gridlines
  – Edit the fill colors