

Time Matters Merge Templates can lose their connection to their Merge Data Files. These step-by-step instructions show how to fix the connections to Merge Data Files.

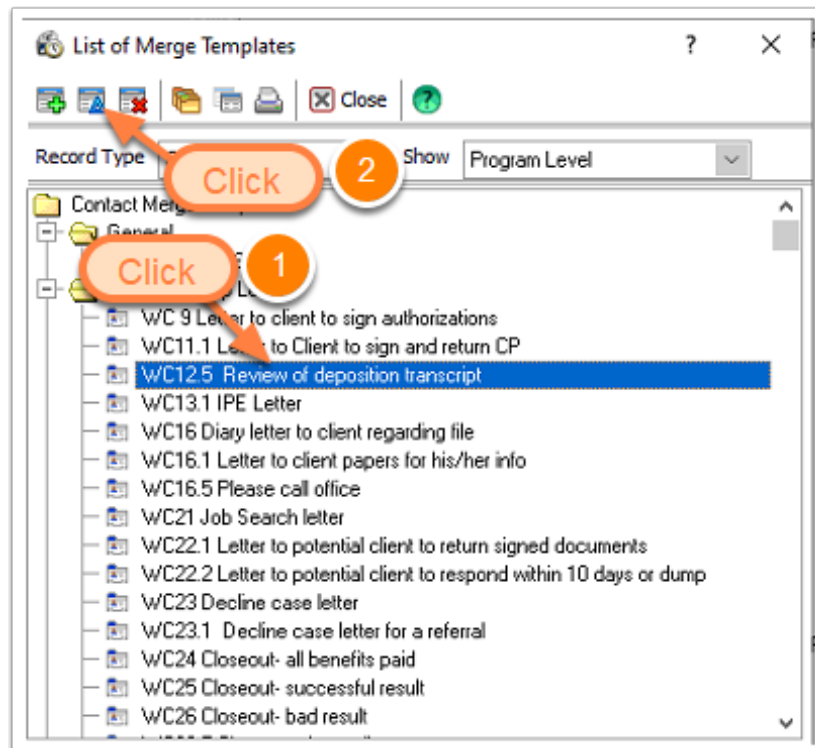
The loss of connection can occur when changing to a new server or to a new computer. In the example used here, the Merge Data Files were located in a C:\Program Files subfolder that can no longer be used. The folder, C:\Programs, is used here for the Merge Data Files folder. A better practice is to use a folder that you create within the Time Matters File Locations folder, typically on your file server.

Open a Merge Template

First, open MS Word.

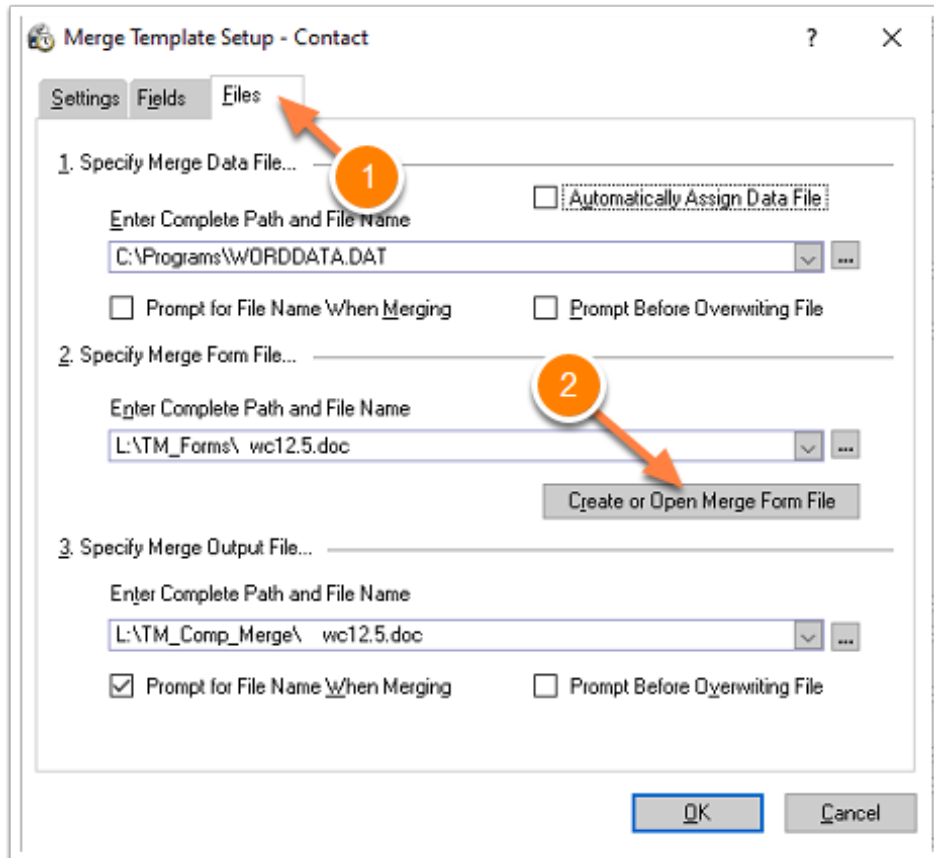
Next, open a Merge Template from Time Matters Main Menu / Setup / Templates / Merge Templates

1. Click on a Merge Template that needs to be fixed.
2. Click the blue triangle **Change** icon.



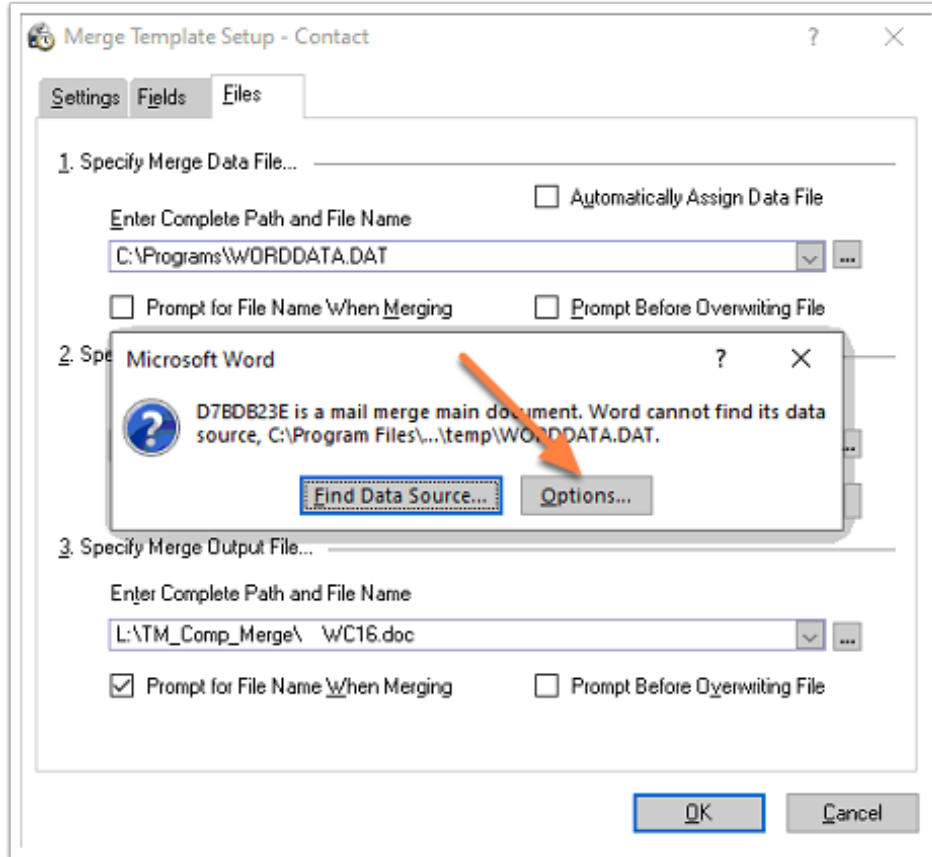
Open the Merge Form File

1. Click the **Files** tab.
2. Click: **Create or Open Merge Form File**.



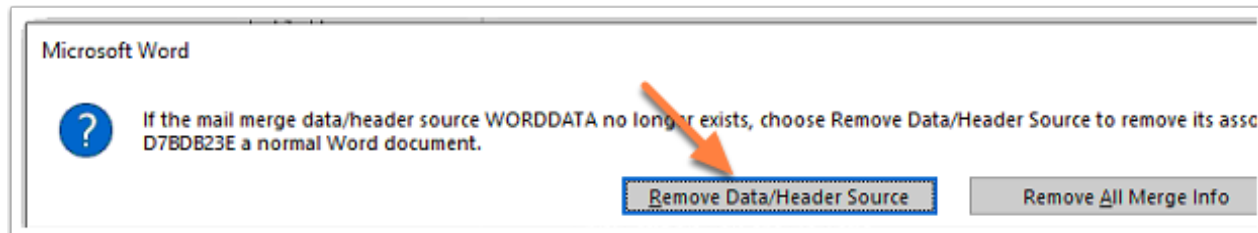
Click Options

Click the **Options** button. A shortcut is to press the Right Arrow and then the Spacebar.



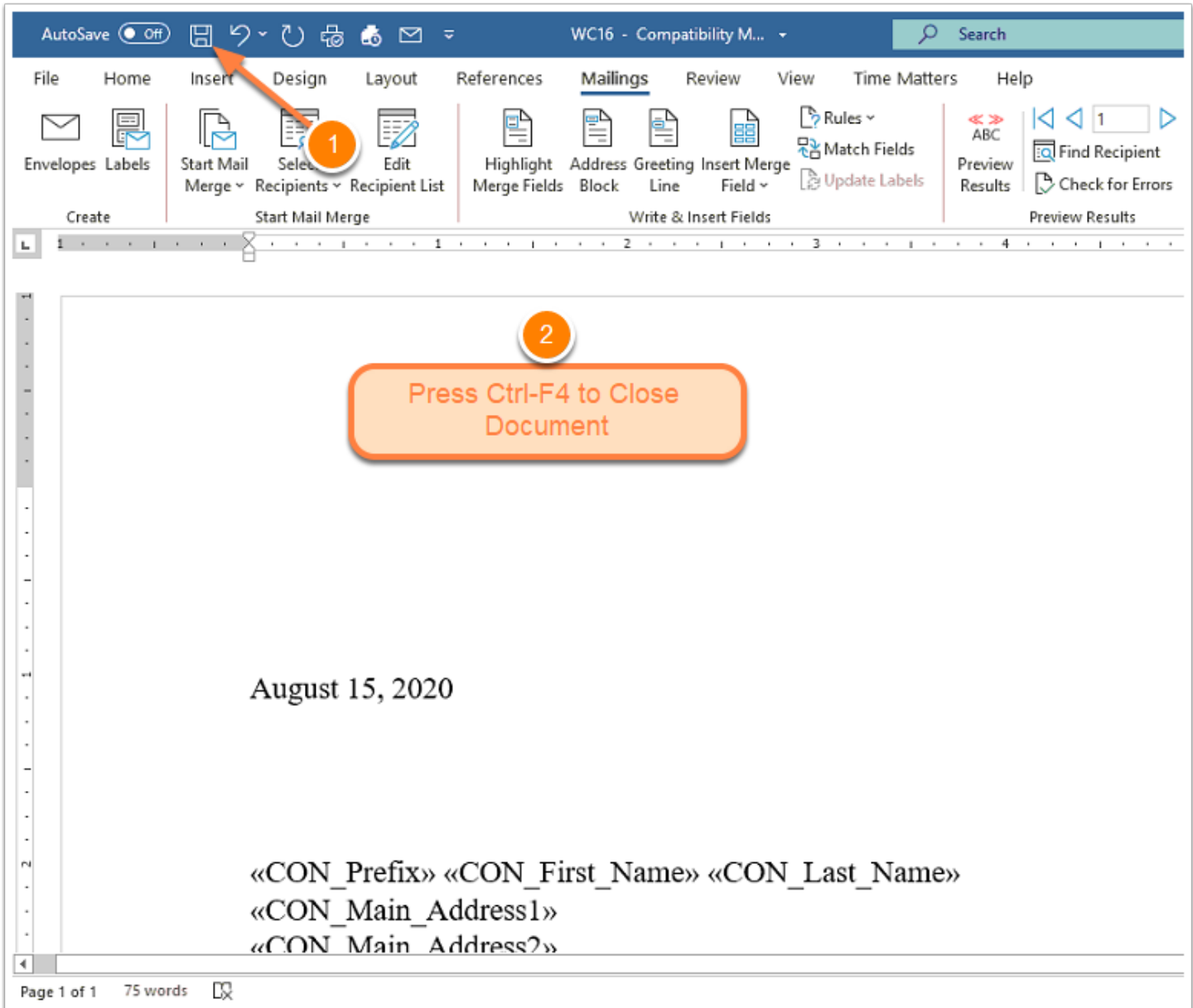
Click Remove Data/Header Source

Click **Remove Data/Header Source**. A shortcut is to simply press the Spacebar.



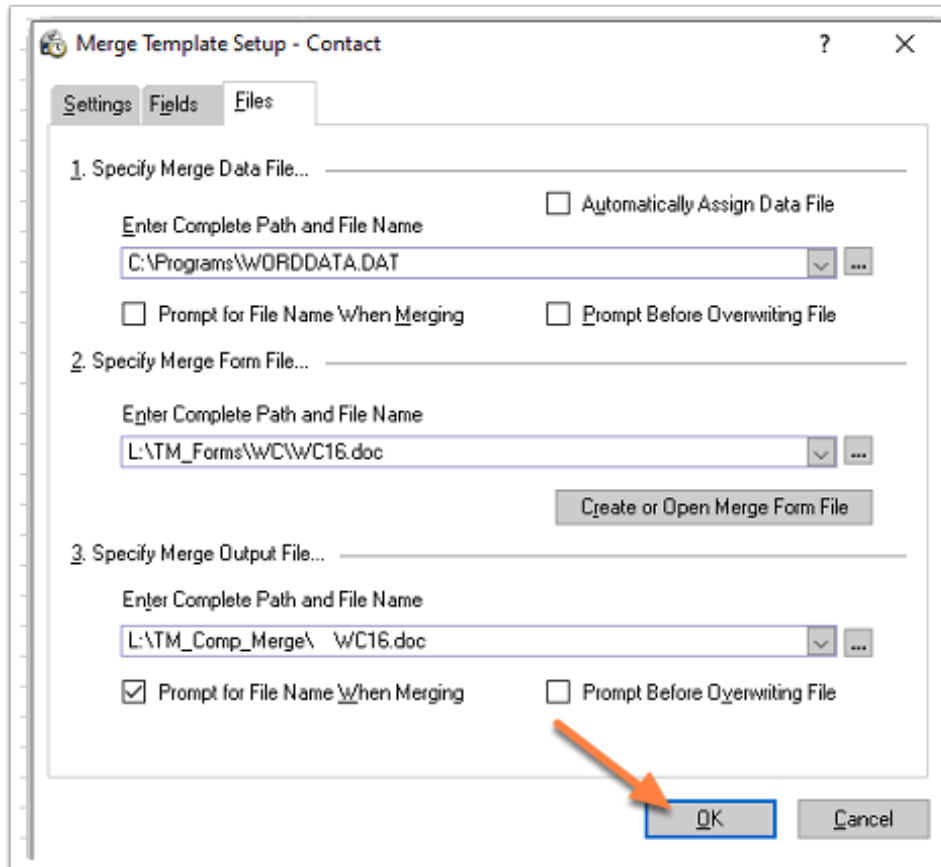
In Word, Click Save or Ctrl-S

1. Click the **Save** button, File / Save, or press **Ctrl-S**.
2. Close the Document with File / Close or **Ctrl-F4**



Close the Merge Template in Time Matters

Click **OK** to close the Merge Template window.



Author

Wells H. Anderson, J.D.

CEO - Active Practice LLC

Edina, Minnesota

952.922.1727 (direct) or 800.575.0007

<http://www.activepractice.com>

Expert assistance with practice management applications

Time Matters Platinum Certified Partner