

Document Generation Overview

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ReadiNow lets you export data directly from Reports and Forms into preformatted MS Word documents. The steps involved are:

1. identify the data to export
2. create a document in MS Word
3. add Mail Merge fields to the document
4. upload the document to your 'Documents Library'
5. link the document to a Form, Report, or workflow

The document generator works by starting with a template document that contains various Word merge fields. The inserted macros consisting of Word merge fields control the generation and data insertion.

Macros can:

- render some field data for the current object, or
- select an object (such as a specific object, or related object) into the current context
- if multiple objects are are selected, then that section of the template document is repeated for each object

Document generation macros can also be used to generate text directly from within calculations. Refer to [Text Templates](#) for details.

Screenshot: Sample template document with word merge fields.

Contact Details

Full Name	{ MERGEFIELD [Name] }
Job Title	{ MERGEFIELD [Job title] }
Mobile	{ MERGEFIELD [Mobile phone] }
Email Address	{ MERGEFIELD [Business email] }