

Creating Word Merge Document Templates

This document explains how to create Word merge documents using Microsoft Word.

Note: This has only been tested using Microsoft Word 2003, 2007 and 2010.

Step 1: Create the set of Word documents that you wish to use in your Service Software .NET system. Once these documents are created with the proper logos and formatting we will embed (add) the merge fields, using the Word Mail Merge Feature.

The merge fields are contained in an Excel file; Merge Data Source 1 – NET and **MUST** be saved on your local workstation or server to access later.

Note: See Merge Data Source fields and descriptions at end of this document.

Step 2: Selecting the data fields into your document.

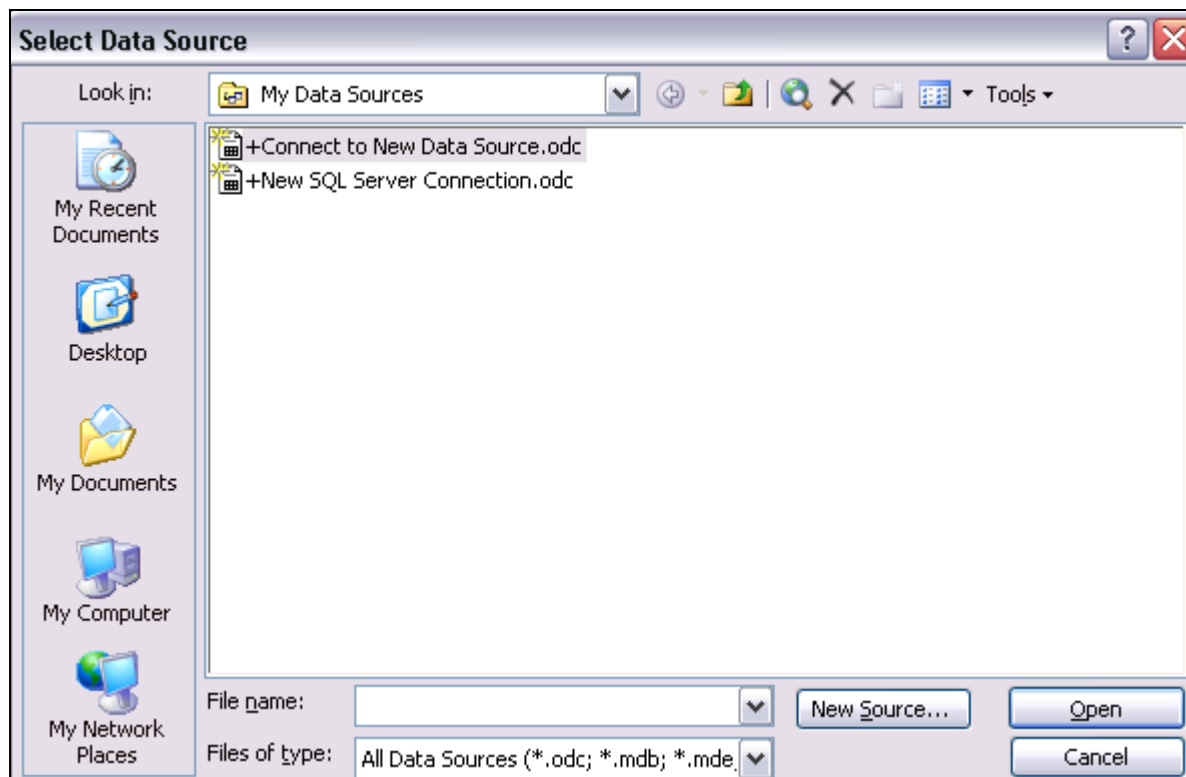
Note: document **MUST** be open at this time.

Connect to the excel data source:

Word 2003: Tools>Letters and Mailings>Mail Merge>Select document type>then Step 1 of 6>Select Starting document>Step 2 of 6 Select Recipients>Use an Existing List>Browse>

Word 2007 & 2010: Word>Mailings>Select Recipients>Use Existing List, see figure 1

Figure 1 – select data source (merge data source 1 – NET):



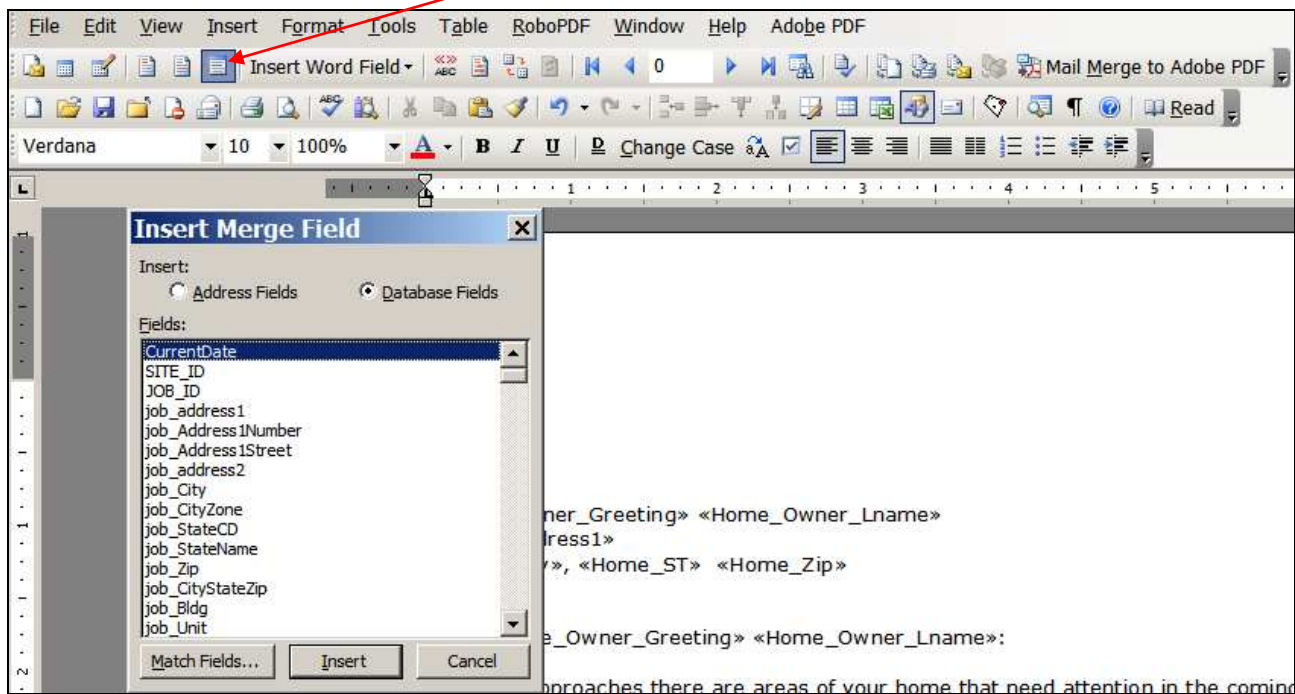
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Once the data source is selected the merge fields you wish to embed in the document will become available in the Mail Merge Toolbar, see figure 2.

Note: The online mail merge is case sensitive so if you are typing in the merge field, please make sure you use exact spelling and upper/lower case.

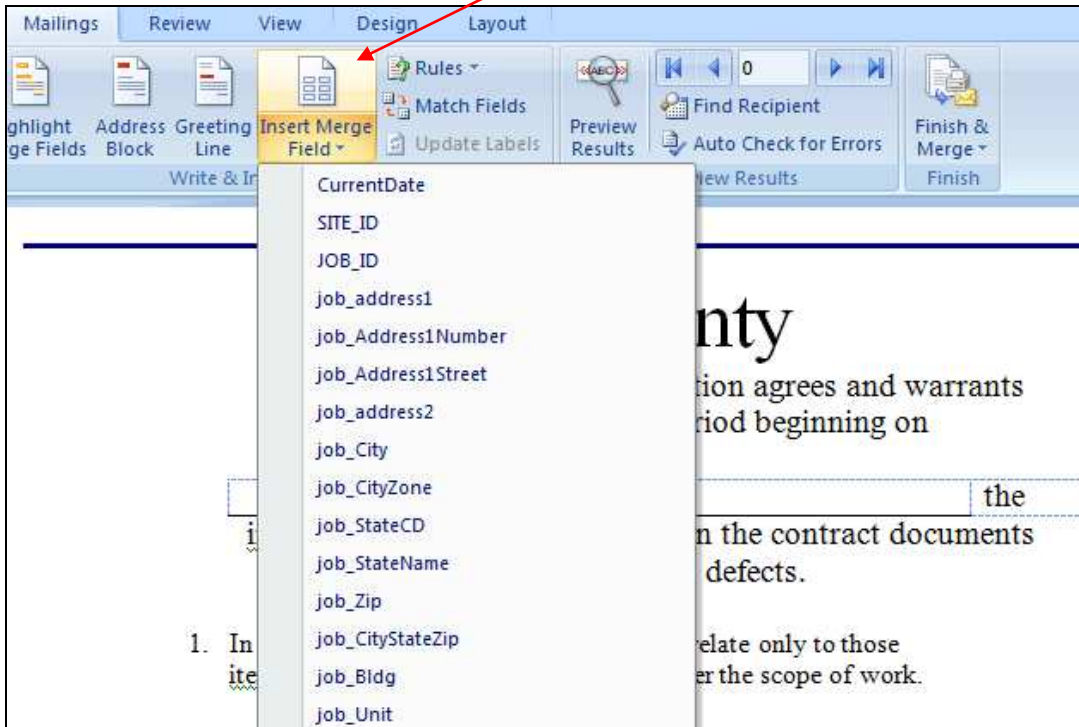
Figure 2 – selecting a merge field:

Word 2003: By selecting the 'Insert Merge Field' button the selection screen will display



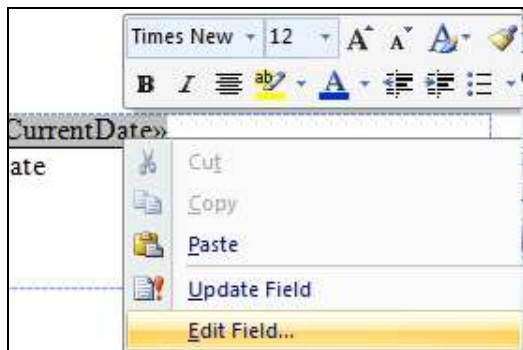
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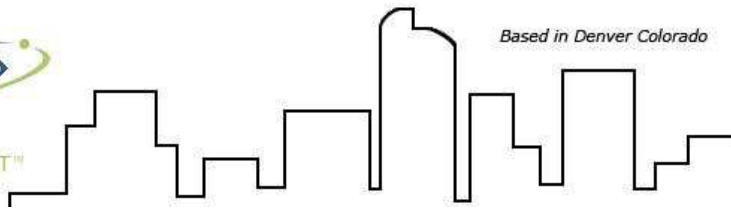
Word 2007 & 2010: Select Insert Merge Field to display the selection list



Note regarding CurrentDate merge field: In order to have the date fields appear properly (Ex: March 3, 2010), the following format **MUST** be followed:

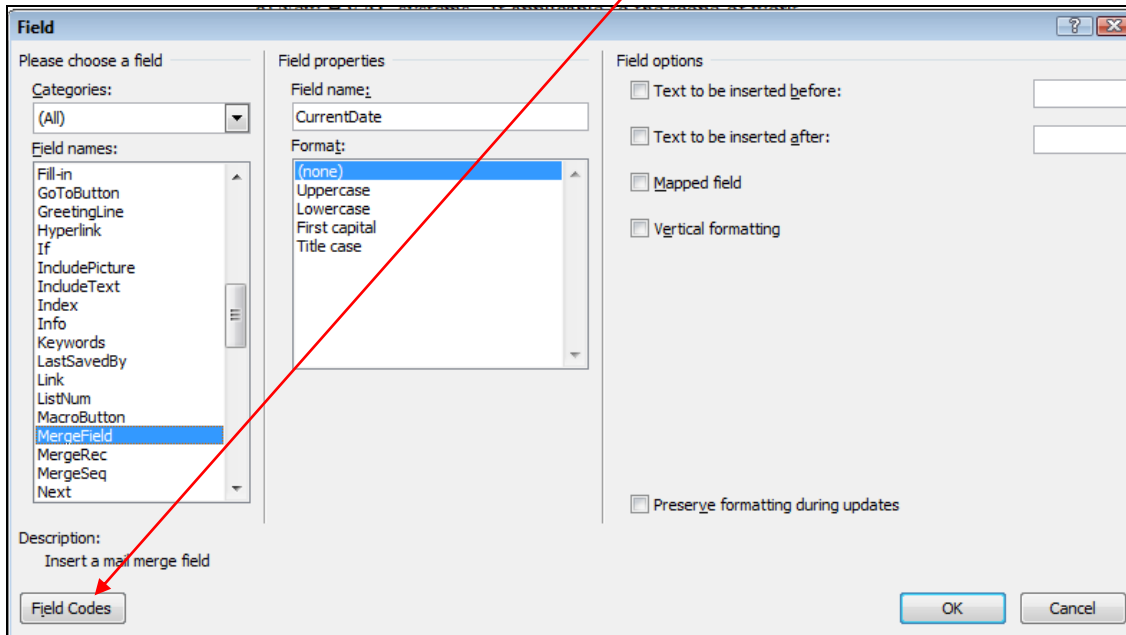
- A. After selecting CurrentDate as a merge field to include in the document, right click on the date field in the document, then select "Edit Field".





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B. The field screen will appear, select the 'Field Codes' button on the bottom left corner of the screen.



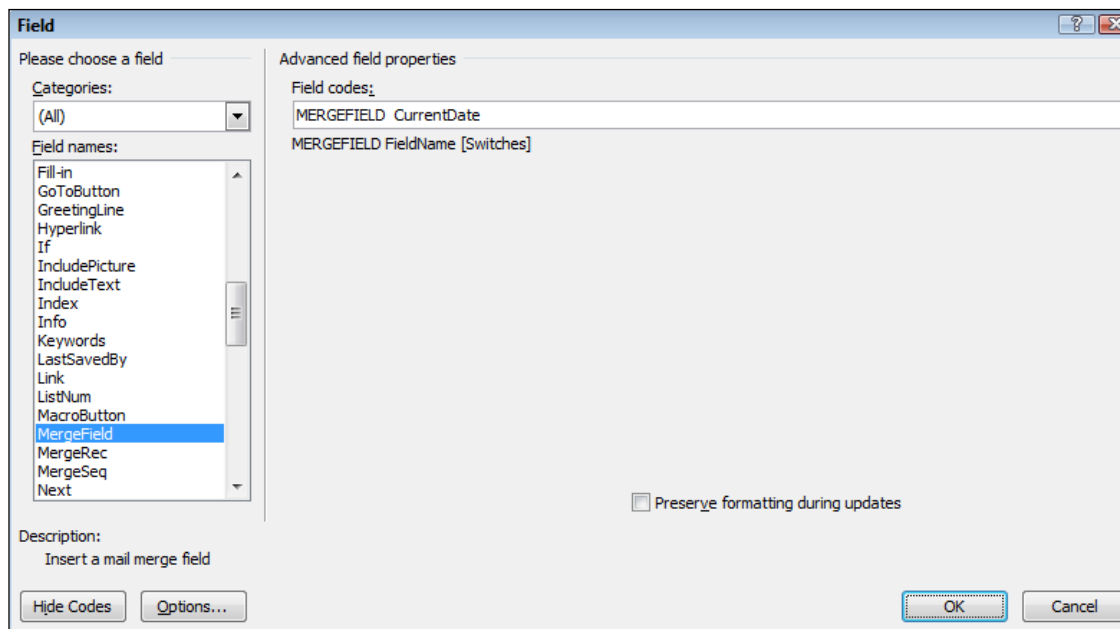
C. The 'Advanced field properties' will appear, and then determine how the date should print by using one of the 'two (2)' format examples below. See figure 2a

For **December 2, 2009** use:

`MERGEFIELD CurrentDate \@ "MMMM d, yyyy"`

For **12/2/2009** use:

`MERGEFIELD CurrentDate \@ "M/d/yyyy"`

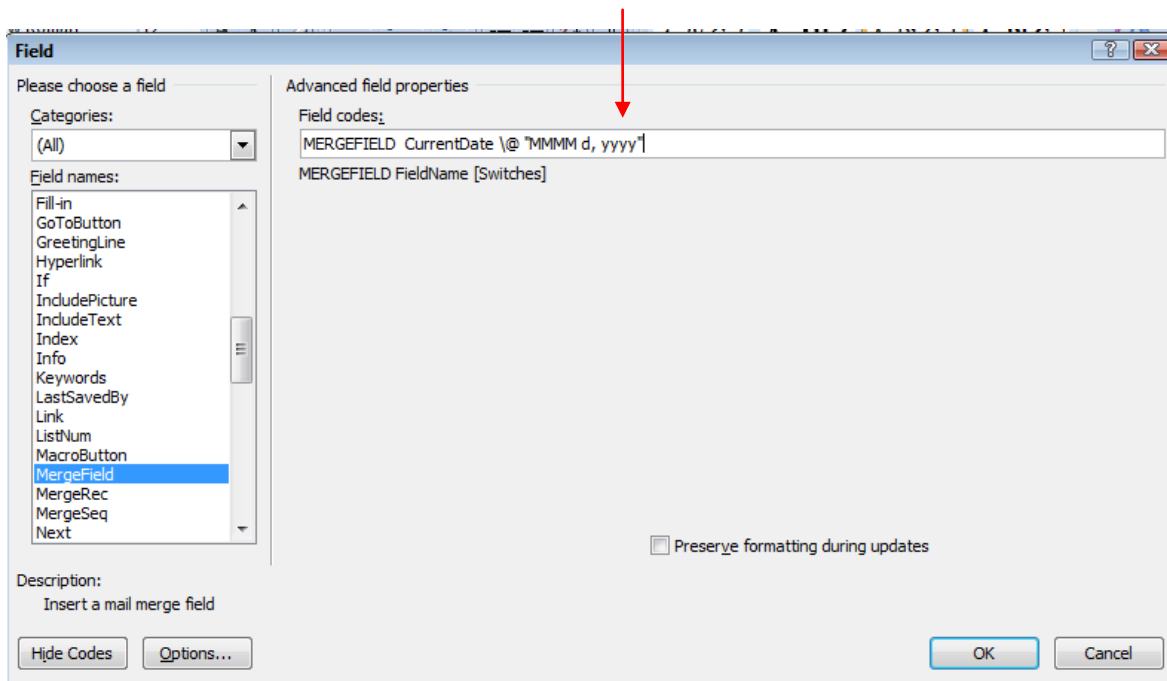


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Note: The quotation marks around the format string **MUST** be used and this is case sensitive.

Figure 2a

The current date is formatted with \@ "MMMM d, yyyy"

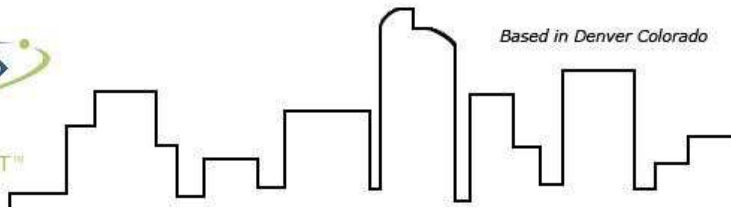


Once the date format is completed, select OK.

NOTE: Verify the checkbox 'Preserve formatting during updates' is **EMPTY**.

Step 3: Adding the template to the .NET system.

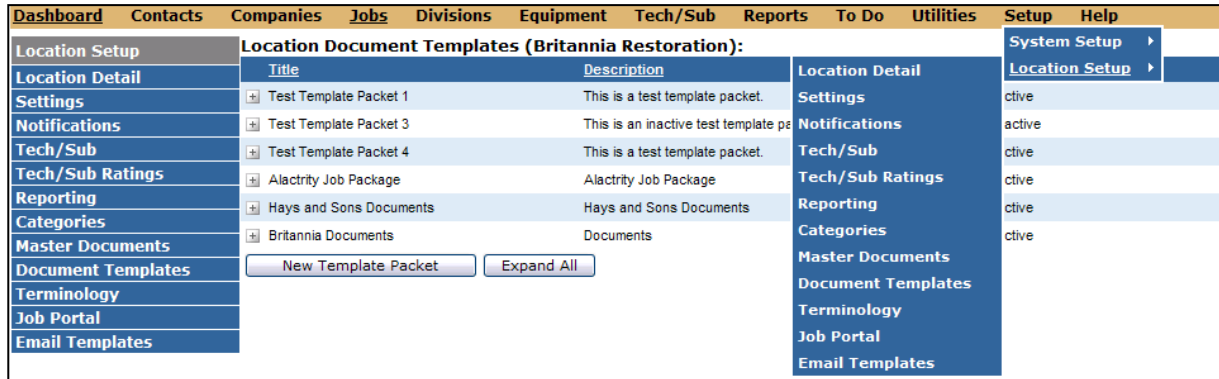
This is an Administrator function **only**; go to Setup, Site/Division/Office/Location Setup, Document Templates.



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Figure 3 – Site/Division/Office/Location – Document Templates:

- A. Select New Template Packet, fill in Packet Title (Example: 'New Job Packet', 'Repair Documents', etc)

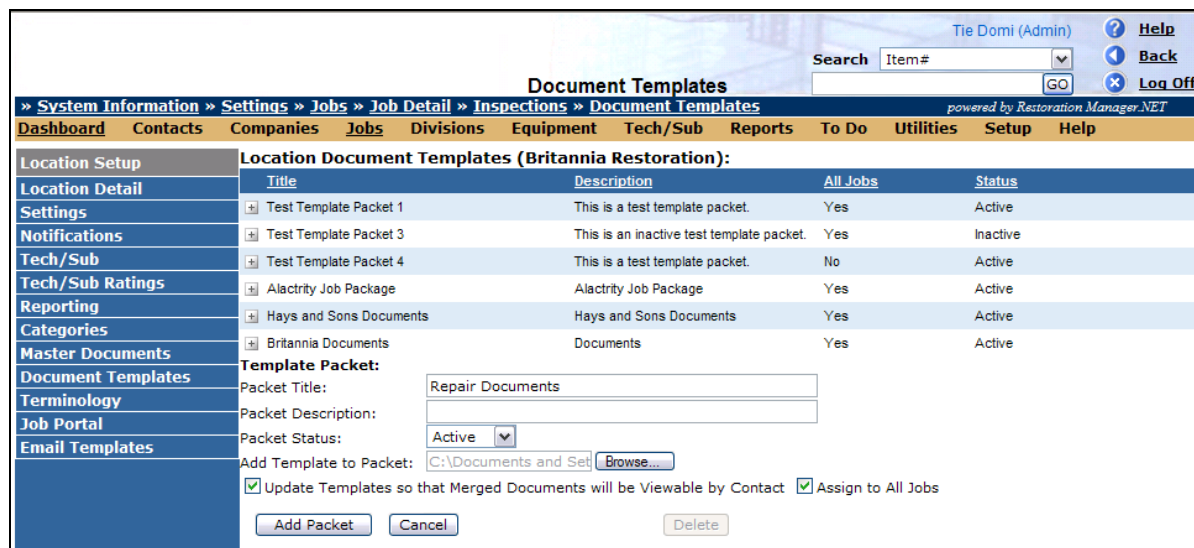


Location Document Templates (Britannia Restoration):	
Title	Description
Test Template Packet 1	This is a test template packet.
Test Template Packet 3	This is an inactive test template packet.
Test Template Packet 4	This is a test template packet.
Alacrity Job Package	Alacrity Job Package
Hays and Sons Documents	Hays and Sons Documents
Britannia Documents	Documents

Buttons:

- B. Packet Description field is not required however if a description is filled in this will populate to all document templates in this packet
- C. Browse for the document template previously created by clicking on add template to packet. **NOTE:** There are two options that can be selected on the template (1) assign to all jobs (if this option is selected all Job/Customer records will have this packet automatically assigned) and (2) allow job contacts to view this document when merged (if Job/Customer Contacts are using the Job/Customer Portal and this option is selected the Contacts will be able to view in the Portal). See figure 4

Figure 4 – Adding templates to packets:



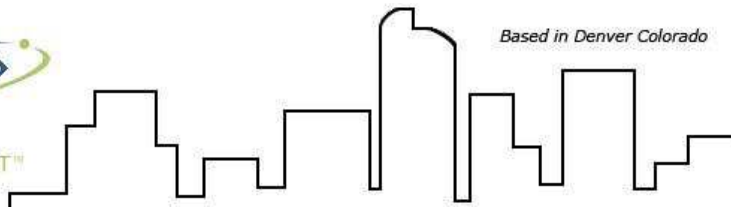
Document Templates

» System Information » Settings » Jobs » Job Detail » Inspections » Document Templates

Title	Description	All Jobs	Status
Test Template Packet 1	This is a test template packet.	Yes	Active
Test Template Packet 3	This is an inactive test template packet.	Yes	Inactive
Test Template Packet 4	This is a test template packet.	No	Active
Alacrity Job Package	Alacrity Job Package	Yes	Active
Hays and Sons Documents	Hays and Sons Documents	Yes	Active
Britannia Documents	Documents	Yes	Active

Template Packet:
 Packet Title:
 Packet Description:
 Packet Status:
 Add Template to Packet:
 Update Templates so that Merged Documents will be Viewable by Contact Assign to All Jobs

Buttons:



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D. Click add packet to upload the packet to your .NET application.

In order to add another document template to an existing packet, **do not** expand the template but click *anywhere* on the line item and you will see an expanded Template Packet. Click on the browse button and find the document you want to upload, click save packet. See figure 5


Figure 5 – Adding additional word Doc’s:

Location Setup	Location Document Templates (CRC-Raleigh HQ):			
Location Detail	Title	Description	All Jobs	Status
Settings	<input type="checkbox"/> Test Template Packet 1	This is a test template packet.	Yes	Active
Notifications	<input type="checkbox"/> Test Template Packet 3	This is an inactive test template packet.	Yes	Inactive
Tech/Sub	<input type="checkbox"/> Alacrity Closing Job Pac	Alacrity Closing Job Pac	Yes	Active
Tech/Sub Ratings	<input type="checkbox"/> Joe Documents	Test	No	Active
Reporting	<input type="checkbox"/> ALL RM Documents	RM Documents	No	Active
Categories	<input type="checkbox"/> Emergency Service Alacrity/Board Ups	Emergency Service Alacrity/Board Ups	No	Active
Master Documents	<input type="checkbox"/> RM Documents	RM Documents	No	Active
Document Templates	<input type="checkbox"/> RM Other Documents	Other Documents	No	Active
Terminology	<input type="checkbox"/> New Mail Merge RM Documents	New Mail Merge Rm Documents	No	Active
Job Portal	Template Packet:			
Email Templates	Packet Title:	<input type="text" value="New Mail Merge RM Documents"/>		
	Packet Description:	<input type="text" value="New Mail Merge Rm Documents"/>		
	Packet Status:	<input type="text" value="Active"/>		
	Add Template to Packet:	<input type="text"/> <input type="button" value="Browse..."/>		
	<input type="checkbox"/> Update Templates so that Merged Documents will be Viewable by Contact		<input type="checkbox"/> Assign to All Jobs	
	<input type="button" value="Save Packet"/>	<input type="button" value="Cancel"/>	<input type="button" value="Delete"/>	

Step 4: Attaching and/or Merging Packets in Job/Customer records

Go to the Job/Customer record, select Document Merge from the left blue toolbar (NOTE: If the option to attach packet to all Jobs was selected the packet will already be there. If this option was not select a packet will need to be selected and attached). See Figure 6.

Figure 6



Document Templates				
Title	Description			
<input type="checkbox"/> Test Template Packet 1	This is a test template packet.			
<input type="checkbox"/> Test Template Packet 3	This is an inactive test template packet.			
<input type="checkbox"/> Alacrity Closing Job Pac	Alacrity Closing Job Pac			
<input type="checkbox"/> Joe Documents	Test			
<input type="checkbox"/> ALL RM Documents	RM Documents			
<input type="checkbox"/> Emergency Service Alacrity/Board Ups	Emergency Service Alacrity/Board Ups			
<input type="checkbox"/> RM Documents	RM Documents			
<input type="checkbox"/> RM Other Documents	Other Documents			
<input type="checkbox"/> New Mail Merge RM Documents	New Mail Merge Rm Documents			
Title	Description	Template View	Merged Date	Document View
Test Template 1	This is a test template.	View		
Test Template 2	This is a test template.	View		
<input type="checkbox"/> Alacrity Job Package	Alacrity Job Package			All
<input type="checkbox"/> Hays and Sons Documents	Hays and Sons Documents			All
<input type="checkbox"/> Britannia Documents	Documents			All
<input type="checkbox"/> Repair Documents	All Standard Repair Documents			All
Title	Description	Template View	Merged Date	Document View
Repair Documents	Repair Authorization	 View		
Repair Authorization.DOC				

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When merging the documents there is the option to merge all documents or a single document that is stored within the packet. See Figure 7

Figure 7

Document Merge:

Title	Description	Viewable	Template View
<input type="checkbox"/> Dawn's Docs Just Testing			
Dawn's Docs PM-2A_CP.doc	Just Testing	No	 View
Dawn's Docs Warranty.doc	Just Testing	No	 View

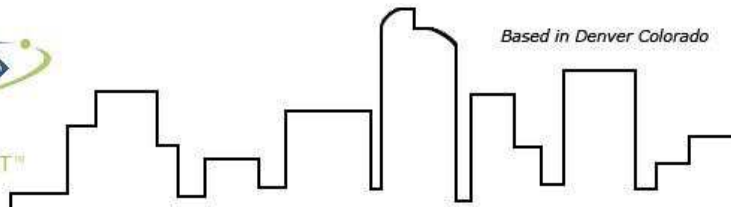
Template Packet:
 Packet Title: Dawn's Docs
 Packet Description: Just Testing
 Merge Needed: All
 Create all merged documents as pdf

Merge Packet Cancel Remove Packet

Once the merge is complete the document(s) are stored in the 'Has Documents' in the left blue toolbar. The documents can then be edited, modified and print from this screen.

NOTE: The Description field will auto fill with the merge date/time.

Has Additional Contacts**	Documents:		
Has Divisions**	Search: Title	All	
Has Schedule**			
Tasks	Title	Description	Master
Plan	Dawn's Docs PM-2A_CP.doc	Merged [3/4/2010 2:35:08 PM]: Just Testing	No
Tech/Sub	Dawn's Docs Warranty.doc	Merged [3/4/2010 2:35:08 PM]: Just Testing	No
Has Correspondence**			
Has Documents**			



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Merge Data Source Fields and Definitions:

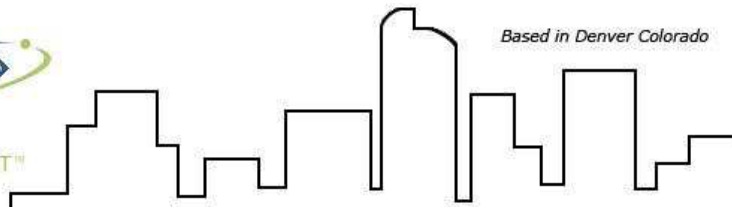
Description of what each database field represents in easy to understand nomenclature. Please note some of the database fields are terminology driven and you may be using a different terminology than noted in the database field and definitions below.

Database Field

Definition

Data Source 1 contents

CurrentDate	Current Date
job_address1	Job/Home Address 1
job_Address1Number	Job/Home Address 1 Number
job_Address1Street	Job/Home Address 1 Street Name
job_address2	Job/Home Address 2
job_City	Job/Home City
job_CityZone	Job/Home City Zone
job_StateCD	Job/Home State/Province 2 Digit Code
job_StateName	Job/Home State/Province Name
job_Zip	Job/Home Zip/Postal Code
job_CityStateZip	Job/Home City, State, Zip
job_Bldg	Job/Home Bldg
job_Unit	Job/Home Unit
job_BldgAndUnit	Job/Home Bldg and Unit in one field
job_FullAddress	Job/Home Full address in one field
job_LotBlock	Job/Home Lot/Block
job_JobID	Job/Home Job ID
Red_Flag	Job/Home Red Flagged (yes or No)
job_WarrantyDate_Start	Job Warranty Start date of construction
job_WarrantyDate_Sold	Job Warranty Sold date
job_WarrantyDate_PreClose	Job Warranty Pre-close date
job_WarrantyDate_Expired	Job Warranty Expiration date
job_WarrantyDate_Contracted	Job Construction – Contract date
job_WarrantyDate_Closed	Job Warranty Close date
job_WarrantyDate_StructureExpire	Job Warranty – Structural expiration date
job_Status	Job Status – Active, Inactive, Deleted
job_Custom_1	Job Custom field order 1
job_Custom_2	Job Custom field order 2
job_Custom_3	Job Custom field order 3
job_Custom_4	Job Custom field order 4
job_Custom_5	Job Custom field order 5
job_Custom_6	Job Custom field order 6
Staff_cont_FirstName	Typically named – CSR first name
Staff_cont_MI	Typically named – CSR middle initial
Staff_cont_LastName	Typically named – CSR last name
Staff_cont_Initials	Typically named – CSR initials emp file
Staff_cont_FullName	Typically named – CSR full name
Staff_cont_ContactName	Typically named – CSR contact name
Staff_cont_Email	Typically named – CSR email address
Staff_BUILDER_Contact_Phone1	Phone 1
Staff_BUILDER_Contact_Phone2	Phone 2
Staff_BUILDER_Contact_Phone3	Phone 3
Staff_BUILDER_Contact_Phone4	Phone 4
Staff_BUILDER_Contact_Phone5	Phone 5
Staff_BUILDER_Contact_Phone1_Type	Phone 1 type
Staff_BUILDER_Contact_Phone2_Type	Phone 2 type
Staff_BUILDER_Contact_Phone3_Type	phone 3 type



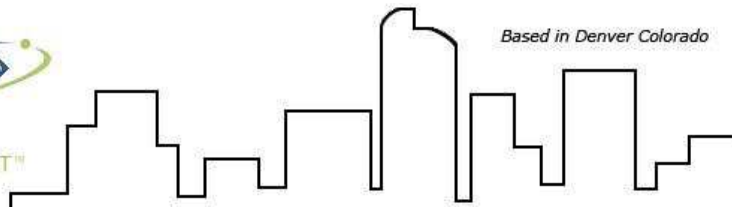
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Database Field

Staff_BUILDER_Contact_Phone4_Type
 Staff_BUILDER_Contact_Phone5_Type
 Super_cont_ContactName
 Super_cont_FirstName
 Super_cont_LastName
 Super_cont_MI
 Super_cont_FullName
 Super_cont_Email
 Super_BUILDER_Contact_Phone1
 Super_BUILDER_Contact_Phone2
 Super_BUILDER_Contact_Phone3
 Super_BUILDER_Contact_Phone4
 Super_BUILDER_Contact_Phone5
 Super_BUILDER_Contact_Phone1_Type
 Super_BUILDER_Contact_Phone2_Type
 Super_BUILDER_Contact_Phone3_Type
 Super_BUILDER_Contact_Phone4_Type
 Super_BUILDER_Contact_Phone5_Type
 PC_FirstName
 PC_MI
 PC_LastName
 PC_FullName
 PC_Initials
 PC_Address1
 PC_Address2
 PC_City
 PC_StateCD
 PC_StateName
 PC_Zip
 PC_CityStateZip
 PC_FullAddress
 PC_Email
 PC_JOB_Contact_Phone1
 PC_JOB_Contact_Phone2
 PC_JOB_Contact_Phone3
 PC_JOB_Contact_Phone4
 PC_JOB_Contact_Phone5
 PC_JOB_Contact_Phone1_Type
 PC_JOB_Contact_Phone2_Type
 PC_JOB_Contact_Phone3_Type
 PC_JOB_Contact_Phone4_Type
 PC_JOB_Contact_Phone5_Type
 PC_Salutation
 PC_logon_LogonID
 PC_logon_LogonPW
 PC_Title
 SC_FirstName
 SC_LastName
 SC_MI
 SC_Initials
 SC_FullName
 SC_Email
 SC_logon_LogonID

Definition

Phone 4 type
 phone 5 type
 Typically named – Supervisor contact name
 Typically named – Supervisor first name
 Typically named – Supervisor last name
 Typically named – Supervisor middle initial
 Typically named – Supervisor full name
 Typically named – Supervisor email address
 Phone 1
 Phone 2
 Phone 3
 Phone 4
 Phone 5
 Phone 1 Type
 Phone 2 Type
 Phone 3 Type
 Phone 4 Type
 Phone 5 Type
 Primary – First Name
 Primary – Middle Initial
 Primary – Last Name
 Primary – Full Name
 Primary – Initials
 Primary – Address 1
 Primary – Address 2
 Primary – City
 Primary – State/Province 2 digit code
 Primary – State/Province name
 Primary – ZIP/Postal Code
 Primary – City, State/Province, Zip/PC
 Primary – Full address
 Primary – Email Address
 Primary – Phone 1
 Primary – Phone 2
 Primary – Phone 3
 Primary – Phone 4
 Primary – Phone 4
 Primary – Phone Type 1
 Primary – Phone Type 2
 Primary – Phone Type 3
 Primary – Phone Type 4
 Primary – Phone Type 5
 Primary – Salutation
 Primary – Logon ID
 Primary – Logon Password
 Primary – Title
 Secondary – First Name
 Secondary – Last name
 Secondary – Middle Initial
 Secondary – Initials
 Secondary – Full name
 Secondary – Email Address
 Secondary – Logon ID



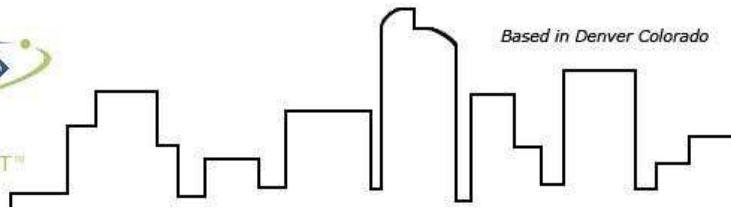
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Database Field

SC_logon_LogonPW
 SC_Address1
 SC_Address2
 SC_City
 SC_StateCD
 SC_Zip
 SC_CityStateZip
 SC_FullAddress
 SC_JOB_Contact_Phone1
 SC_JOB_Contact_Phone2
 SC_JOB_Contact_Phone1_Type
 SC_JOB_Contact_Phone2_Type
 SC_Title
 Floor_Plan_Name
 proj_Desc
 proj_Status
 proj_City
 proj_StateCD
 proj_StateName
 proj_Zip
 proj_CityStateZip
 proj_County
 proj_Code
 proj_Location
 proj_Subdivision
 build_BuilderName
 build_Address1
 build_Address2
 build_City
 build_StateCD
 build_StateName
 build_Zip
 build_CityStateZip
 BUILDER_Phone3
 BUILDER_Phone1
 BUILDER_Phone2
 BUILDER_Phone4
 BUILDER_Phone5
 BUILDER_Phone1_Type
 BUILDER_Phone2_Type
 BUILDER_Phone3_Type
 BUILDER_Phone4_Type
 BUILDER_Phone5_Type
 build_OwnerWebSite
 build_VendorWebSite
 build_WebSite
 build_FullAddress
 site_SiteDesc
 site_Address1
 site_Address2
 site_City
 site_StateCD
 site_StateName
 site_Zip
 site_CityStateZip
 site_FullAddress

Definition

Secondary - Last name
 Secondary - address 1
 Secondary - address 2
 Secondary - City
 Secondary - State Code
 Secondary - ZIP
 Secondary - City, State/Prov, Zip/PC
 Secondary - Full address
 Secondary - Phone 1
 Secondary - Phone 2
 Secondary - Phone 1 Type
 Secondary - Phone 2 Type
 Secondary - Title
 Floor Plan Name
 Project/Subdivision Description
 Project/Subdivision status (active, inactive, deleted)
 Project/Subdivision City
 Project/Subdivision State CD/Prov CD
 Project/Subdivision State/Prov name
 Project/Subdivision ZIP
 Project/Subdivision City, State/Prov, Zip/PC
 Project/Subdivision County
 Project/Subdivision Code
 Project/Subdivision Address 1
 Project/Subdivision Address 2
 Your Company Name
 Your Company Address 1
 Your Company Address 2
 Your Company City
 Your Company State/Province CD
 Your Company State/Province name
 Your Company ZIP/PC
 Your Company City, State/Province, Zip/PC
 Your Company Phone 3
 Your Company Phone 1
 Your Company Phone 2
 Your Company Phone 4
 Your Company Phone 5
 Your Company Phone Type 1
 Your Company Phone Type 2
 Your Company Phone Type 3
 Your Company Phone Type 4
 Your Company Phone Type 5
 Your Company URL job
 Your Company URL Vendor
 Your Company Web URL
 Your Company Full Address
 Site/Division/Office/Location
 Site - address 1
 Site - Address 2
 Site - City
 Site - State CD/Province 2 digit code
 Site - State/Province Name
 Site - Zip/Postal Code
 Site - City/State or Proc/Zip or PC
 Site - Full Address



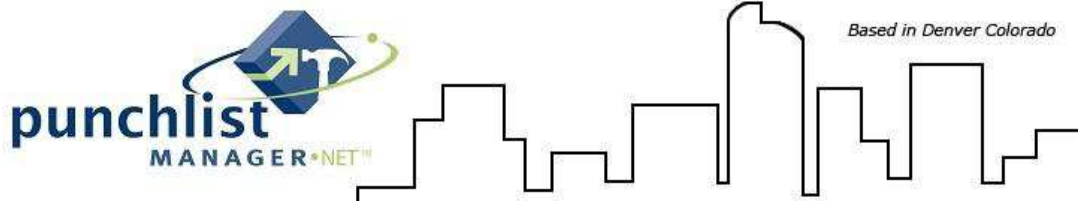
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Database Field

site_ContName
 site_ContPhone
 site_ContFax
 site_ContEmail
 proj_PC_FirstName
 proj_PC_MI
 proj_PC_LastName
 proj_PC_Initials
 proj_PC_FullName
 proj_PC_Address1
 proj_PC_Address2
 proj_PC_City
 proj_PC_StateCD
 proj_PC_StateName
 proj_PC_Zip
 proj_PC_CityStateZip
 proj_PC_FullAddress
 proj_PC_Email
 proj_PC_Contact_Phone1
 proj_PC_Contact_Phone2
 proj_PC_Contact_Phone3
 proj_PC_Contact_Phone4
 proj_PC_Contact_Phone5
 proj_PC_Contact_Phone1_Type
 proj_PC_Contact_Phone2_Type
 proj_PC_Contact_Phone3_Type
 proj_PC_Contact_Phone4_Type
 proj_PC_Contact_Phone5_Type
 proj_PC_Title
 proj_SC_FirstName
 proj_SC_MI
 proj_SC_LastName
 proj_SC_Initials
 proj_SC_FullName
 proj_SC_Address1
 proj_SC_Address2
 proj_SC_City
 proj_SC_StateCD
 proj_SC_StateName
 proj_SC_Zip
 proj_SC_CityStateZip
 proj_SC_FullAddress
 proj_SC_Email
 proj_SC_Contact_Phone1
 proj_SC_Contact_Phone2
 proj_SC_Contact_Phone3
 proj_SC_Contact_Phone4
 proj_SC_Contact_Phone5
 proj_SC_Contact_Phone1_Type
 proj_SC_Contact_Phone2_Type
 proj_SC_Contact_Phone3_Type
 proj_SC_Contact_Phone4_Type
 proj_SC_Contact_Phone5_Type

Definition

Site - Contact Full name
 Site - Phone
 Site - Fax
 Site - Email
 Project/Subdivision - Primary Contact - First name
 Project/Subdivision - Primary Contact - Middle Initial
 Project/Subdivision - Primary Contact - Last name
 Project/Subdivision - Primary contact - Initials
 Project/Subdivision - Primary contact - Full name
 Project/Subdivision - Primary Contact - Address 1
 Project/Subdivision - Primary contact - address 2
 Project/Subdivision - Primary contact - City
 Project/Subdivision - Primary Contact - State/Prov code
 Project/Subdivision - Primary Contact - State/Prov name
 Project/Subdivision - Primary contact - Zip/PC
 Project/Subdivision - Primary contact - City/State/Prov Zip/PC
 Project/Subdivision - Primary contact - Full address
 Project/Subdivision - Primary Contact - Email
 Project/Subdivision - Primary contact - Phone 1
 Project/Subdivision - Primary contact - Phone 2
 Project/Subdivision - Primary contact - Phone 3
 Project/Subdivision - Primary contact - Phone 4
 Project/Subdivision - Primary contact - Phone 5
 Project/Subdivision - Primary Contact - Phone 1 type
 Project/Subdivision - Primary Contact - Phone 2 type
 Project/Subdivision - Primary Contact - Phone 3 type
 Project/Subdivision - Primary Contact - Phone 4 type
 Project/Subdivision - Primary Contact - Phone 5 type
 Project/Subdivision - Primary Contact - Title
 Project/Subdivision - Secondary Contact - First name
 Project/Subdivision - Secondary Contact - Middle Initial
 Project/Subdivision - Secondary Contact - Last name
 Project/Subdivision - Secondary contact - Initials
 Project/Subdivision - Secondary contact - Full name
 Project/Subdivision - Secondary Contact - Address 1
 Project/Subdivision - Secondary contact - address 2
 Project/Subdivision - Secondary contact - City
 Project/Subdivision - Secondary Contact - State/Prov code
 Project/Subdivision - Secondary Contact - State/Prov name
 Project/Subdivision - Secondary contact - Zip/PC
 Project/Subdivision - Secondary contact - City/State/Prov Zip/PC
 Project/Subdivision - Secondary contact - Full address
 Project/Subdivision - Secondary Contact - Email
 Project/Subdivision - Secondary contact - Phone 1
 Project/Subdivision - Secondary contact - Phone 2
 Project/Subdivision - Secondary contact - Phone 3
 Project/Subdivision - Secondary contact - Phone 4
 Project/Subdivision - Secondary contact - Phone 5
 Project/Subdivision - Secondary Contact - Phone 1 type
 Project/Subdivision - Secondary Contact - Phone 2 type
 Project/Subdivision - Secondary Contact - Phone 3 type
 Project/Subdivision - Secondary Contact - Phone 4 type
 Project/Subdivision - Secondary Contact - Phone 5 type



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Database Field

proj_SC_Title
 job_RedFlag
 Staff2_FullName
 Staff2_Address1
 Staff2_Address2
 Staff2_CityStateZip
 Staff2_Email
 Staff2_Phone1
 Staff2_Phone1_Type
 Staff2_Phone2
 Staff2_Phone2_Type
 ListType
 DateListSubmitted
 list_DateListOpened
 DateContacted
 LIST_ReviewDate
 LIST_ReviewDateEnd
 LIST_RepairDate
 LIST_RepairDateEnd
 list_SignOff_StaffDate
 list_SignOff_OwnerDate
 list_DateListClosed
 Item_DateRequested
 Item_Request_Service
 Item_Request_ActionTaken
 Category
 SubCategory
 Determination

Definition

Project/Subdivision – Secondary Contact – Title
 Is Job Red Flagged (yes/no)
 Staff2
 Staff2 Address1
 Staff2 address2
 Staff2 City/State or Province/Zip/Postal Code
 Staff2 email
 Staff2 phone 1
 Staff2 Phone 2
 Staff2 Phone 1 type
 Staff2 Phone 2 type
 List Type Description
 Date Submitted
 Date Opened
 Date Contacted
 Date Reviewed Start
 Date Reviewed end
 Date scheduled for repair start
 Date scheduled for repair end
 Sign off List date – Supervisor
 Sign off List date - owner
 Date closed
 Date Requested
 Service to be performed
 Action taken or follow up on the Item
 Category
 Sub-category
 Determination