

Mortgage+Care

HOW TO CHANGE LOAN DOCUMENT MAILMERGE DATA SOURCE PATH

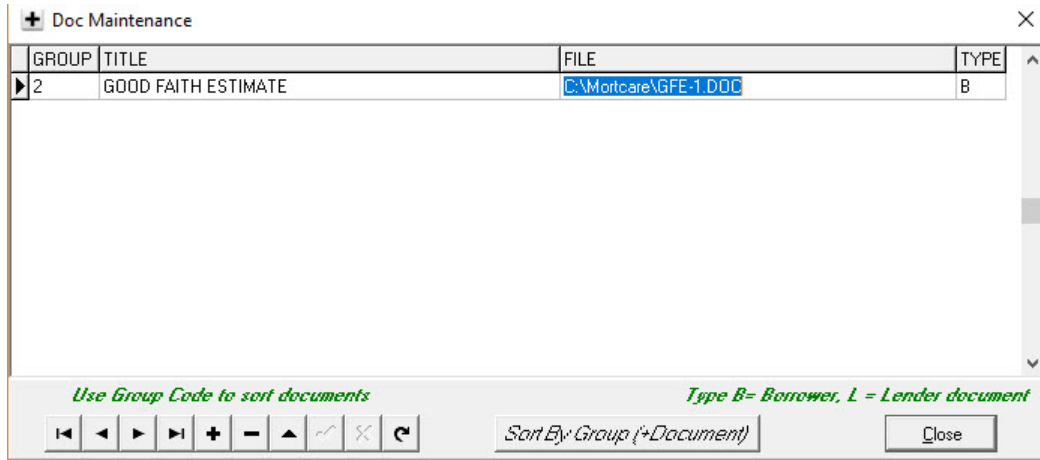
Sometimes it is necessary to change the folder where merge documents reside. The default is C:\LOANDOCS. Here are the steps to change the folder.

In this example, we change the document folder from C:\LOANDOCS to C:\Mortcare.

Step 1: If not using the default C:\LOANDOCS folder, set the Doc Directory in **Utilities > Setup > Default Info** tab.

The screenshot shows the 'Company Setup' window with the 'Email Settings' tab selected. The 'Default Info' sub-tab is active. The 'Doc Directory' field is highlighted with a red box and contains the path 'C:\Mortcare'. Other fields include 'Image Location', 'Credit Report \$', 'Appraisal \$', 'Notary \$', 'Recording Fee \$', 'Escrow Fee \$', 'Doc. Prep. Fee \$', 'Tax Service \$', 'Interest Rate %', 'Term (month)', 'Late Fee %', 'Loan Officer', 'Loan Rep's #', 'Appraiser', 'Escrow Company', 'Trustee', 'Def. Servicing Fee', 'Min. Servicing Fee \$', 'Days To Hold Cheks', 'Late Fees To Investor %', 'Prepayment To Investor %', 'ACH Type', 'PPP Setup', 'Default Demand Fees', 'Impound Account', 'Impound Transfer', 'Default Investor', and 'Loan Counter'.

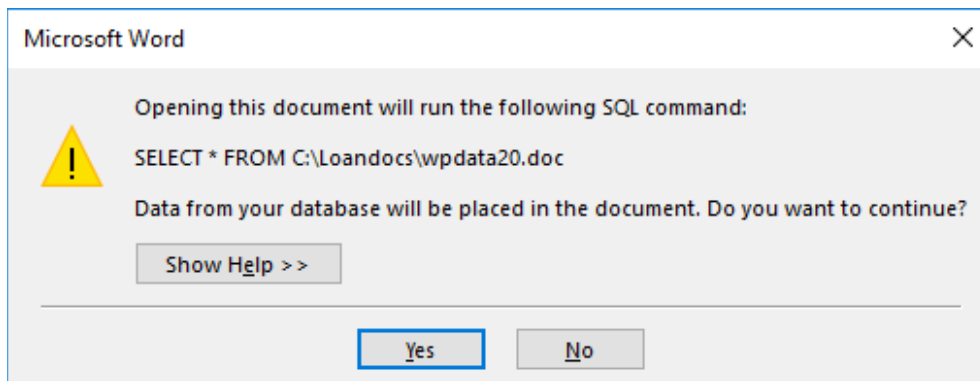
Step 2: Put the merge documents you intend to use in the Doc Directory folder.



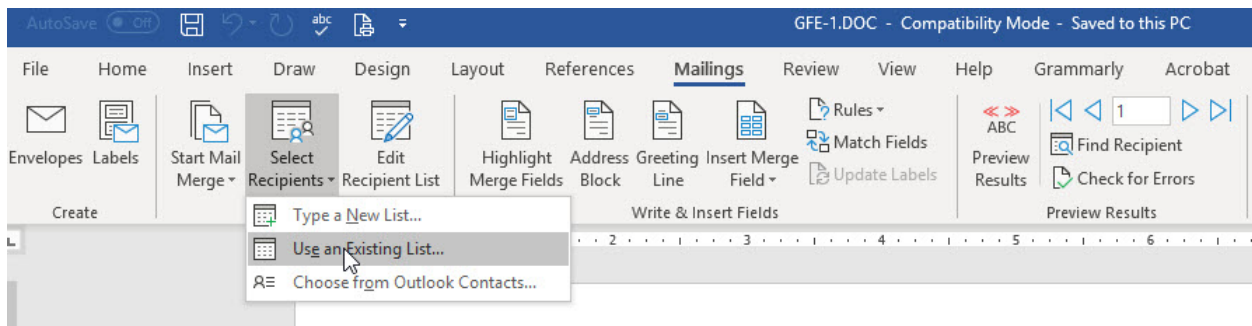
Step 3: Menu to Mortgage+Care Docs > Maintain Docs. Edit the File name to match the loan document location. Note – if the documents are in the same folder as Morcarew.exe , no file path is needed here.

Step 4: Open each document.

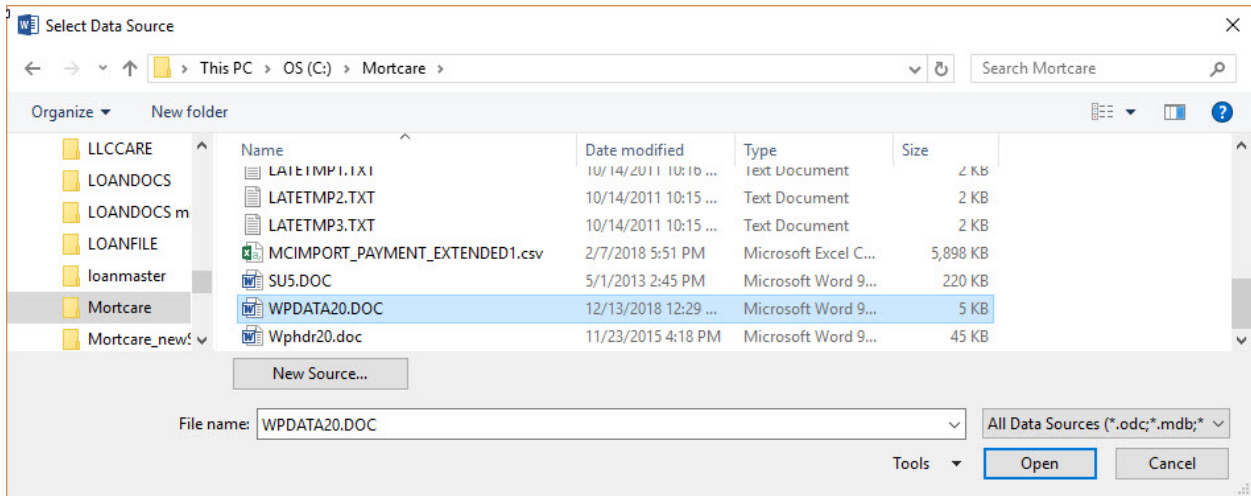
Locate Existing Data Source: The current Data Path appears each time you open a document on the SELECT * FROM C:\Loandocs\wpdata20.doc line of the Dialog screen that appears (Your data source path may be different due to the file location on your computer). Click on the **Yes** button to turn on the Mail Merge functionality of the document (if **No** is selected, most of the options on the Mail Merge tab will be greyed out, corrupting the document).



Click on the **Mailings** tab then click **Select Recipients > Use an Existing List...**

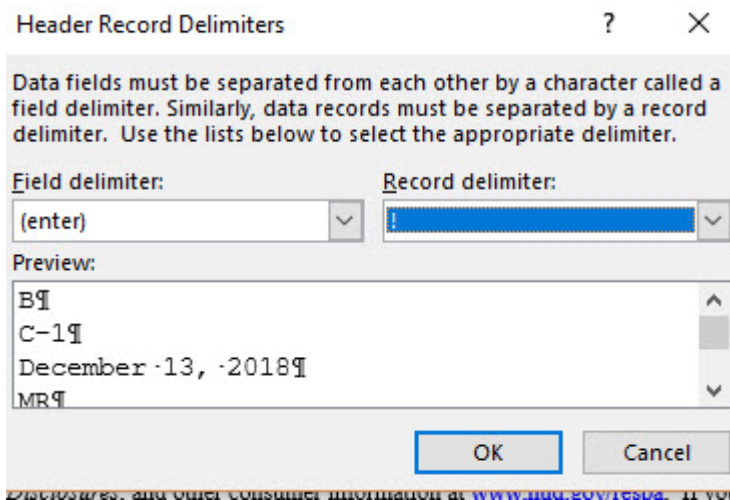


The **Select Data Source** window appears with a default location. Select Wpdata20.doc in the new folder.



Next, set the Header record delimiters. Set the Field delimiter to (enter)

And the Record delimiter to ! (exclamation)



Step 5: Save the document and close it.

You can now test the document in Mortgage+Care **Docs > Create Borrower Docs**.

TROUBLESHOOTING:

If the correct borrower does not come up, make sure a new copy of Wpdata20.doc is created.

There should be a Wphdr20.doc in the target folder.

If you modify the temporary merged file, you can save it back to the template file for next time.