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 suing the default C:\LOANDOCS folder, set the Doc Directory in **Utilities > Setup > Default Info** tab.


**Step 2:** Put the merge documents you intend to use in the Doc Directory folder.
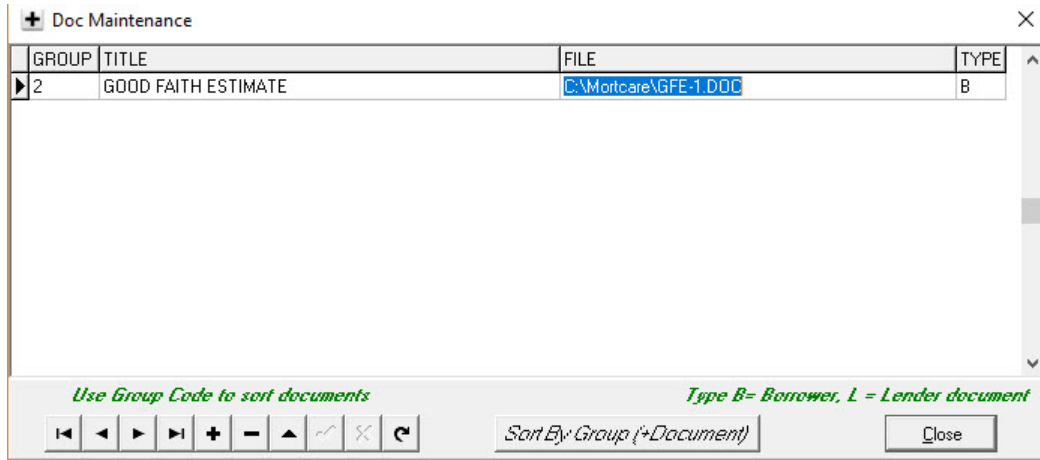
Step 3: Menu to Mortgage+Care **Docs > Maintain Docs**. Edit the File name to match the loan document location. Note – if the documents are in the same folder as Morcarew.exe , no file path is needed here.

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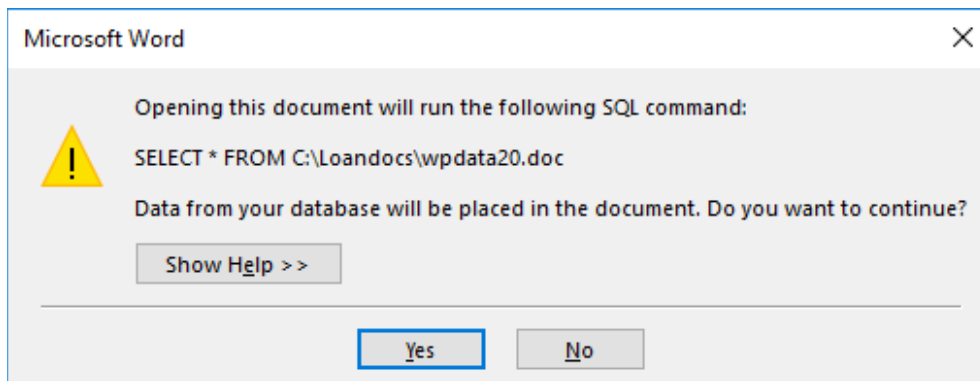
Click on the **Mailings** tab then click **Select Recipients > Use an Existing List…**
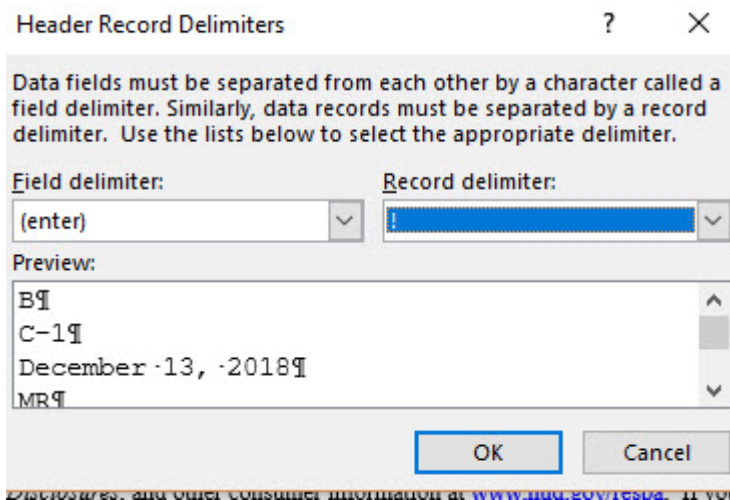

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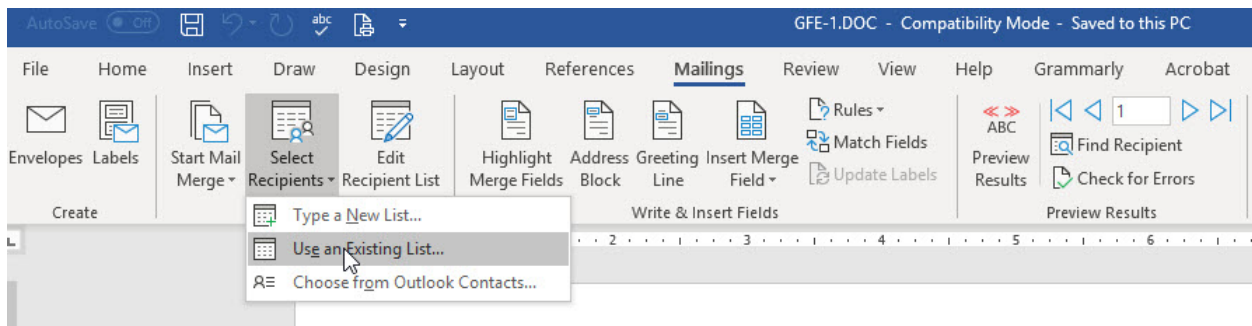
The Select Data Source window appears with a default location. Select WPDATA20.DOC in the new folder.
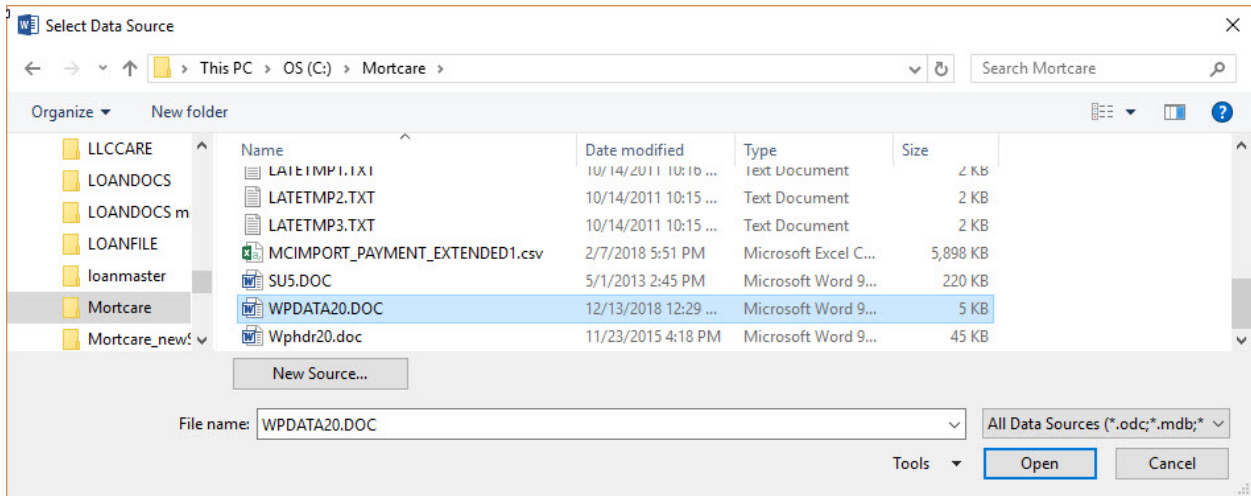
Next, set the Header record delimiters. Set the Field delimiter to (enter)

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.