

Merge Keys for External Applications

Merge Keys for Microsoft Word (versions 2004, 2008, and 2011), Excel (versions 2004, 2008, and 2011), and OmniGraffle Pro (versions 3, 4, and 5)

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Before you proceed

We recommend that you type the entire key you wish to use. Avoid copying the merge keys from this document and pasting them in the template as it can lead to some inconsistencies.

Merge Keys

The Contact

<\$cnt.salutation\$>
<\$cnt.firstname\$>
<\$cnt.middlename\$>
<\$cnt.lastname\$>
<\$cnt.suffix\$>
<\$cnt.fullname\$>
<\$cnt.nickname\$>
<\$cnt.alias\$>
<\$cnt.tagline\$>

The Contact's Job Title and Role Played

<\$cnt.role.played\$>
<\$cnt.role.title\$>

The Contact's Default Organization

<\$cnt.org.name\$>
<\$cnt.org.tagline\$>
<\$cnt.org.phone1\$>
<\$cnt.org.phone2\$>
<\$cnt.org.address.type\$>
<\$cnt.org.address\$>
<\$cnt.org.city\$>
<\$cnt.org.state\$>
<\$cnt.org.country\$>
<\$cnt.org.postal\$>

The Contact's Phone and Email

<\$cnt.phone1\$>
<\$cnt.phone2\$>
<\$cnt.email.type\$>
<\$cnt.email\$>

The Contact's Direct Address

<\$cnt.address.type\$>
<\$cnt.address\$>
<\$cnt.city\$>
<\$cnt.state\$>
<\$cnt.country\$>
<\$cnt.postal\$>

The Contact's Birthday

<\$cnt.birthdate\$>
<\$cnt.birthyear\$>
<\$cnt.birthmonth\$>
<\$cnt.birthday\$>

The Contact's Anniversary

<\$cnt.anniversary\$>
<\$cnt.anniversaryyear\$>
<\$cnt.anniversarymonth\$>
<\$cnt.anniversaryday\$>

My Information

<\$me.salutation\$>
<\$me.firstname\$>
<\$me.middlename\$>
<\$me.lastname\$>
<\$me.suffix\$>
<\$me.fullname\$>
<\$me.nickname\$>
<\$me.alias\$>
<\$me.tagline\$>

My Job Title and Role Played

<\$me.role.played\$>
<\$me.role.title\$>

My Default Organization

<\$me.org.name\$>
<\$me.org.tagline\$>
<\$me.org.phone1\$>
<\$me.org.phone2\$>
<\$me.org.address.type\$>
<\$me.org.address\$>
<\$me.org.city\$>
<\$me.org.state\$>
<\$me.org.country\$>
<\$me.org.postal\$>
<\$me.org.extra1\$>
<\$me.org.extra2\$>
<\$me.org.extra3\$>
<\$me.org.extra4\$>
<\$me.org.extra5\$>
<\$me.org.extra6\$>
<\$me.org.extra7\$>

<\$me.org.extra8>
<\$me.org.extra9>
<\$me.org.extra10>
<\$me.org.extra11>
<\$me.org.extra12>
<\$me.org.extraDate1>
<\$me.org.extraDate2>
<\$me.org.extraDate3>
<\$me.org.extraDate4>

My Phone and Email

<\$me.phone1\$>
<\$me.phone1.type\$>
<\$me.phone2\$>
<\$me.phone2.type\$>
<\$me.email.type\$>
<\$me.email\$>

My Direct Address

<\$me.address.type\$>
<\$me.address\$>
<\$me.city\$>
<\$me.state\$>
<\$me.country\$>
<\$me.postal\$>

Merge keys for Microsoft Word 2008

Opportunity Merge Keys

<\$opportunity.assignedTo.contact.name\$>
<\$opportunity.cachedTotalAmount\$>
<\$opportunity.category.name\$>
<\$opportunity.opportunityStateString\$>
<\$opportunity.completeDate\$>
<\$opportunity.createDate\$>
<\$opportunity.createdBy.contact.name\$>
<\$opportunity.currentPipeline.name\$>
<\$opportunity.currentPipelineStage.name\$>
<\$opportunity.details\$>
<\$opportunity.dueDate\$>
<\$opportunity.extra1\$>
<\$opportunity.extra10\$>
<\$opportunity.extra11\$>
<\$opportunity.extra12\$>
<\$opportunity.extra2\$>
<\$opportunity.extra3\$>
<\$opportunity.extra4\$>
<\$opportunity.extra5\$>
<\$opportunity.extra6\$>
<\$opportunity.extra7\$>
<\$opportunity.extra8\$>
<\$opportunity.extra9\$>
<\$opportunity.extraDate1\$>
<\$opportunity.extraDate2\$>
<\$opportunity.extraDate3\$>
<\$opportunity.extraDate4\$>
<\$opportunity.modifyDate\$>
<\$opportunity.name\$>
<\$opportunity.opportunityStateReason.name\$>
<\$opportunity.opportunityStateString\$>
<\$opportunity.opportunityTypeString\$>
<\$opportunity.probability\$>
<\$opportunity.startDate\$>
<\$opportunity.term.plainTextRepresentation\$>
<\$opportunity.allContactsAsString\$>
<\$opportunity.keywordsString\$>
<\$opportunity.allOrganizationsAsString\$>
<\$opportunity.lastNote.name\$>
<\$opportunity.lastTask.name \$>
<\$opportunity.lastTimeblock.name\$>
<\$opportunity.nextPendingTask.name\$>
<\$opportunity.nextPendingTimeblock.name\$>

<\$opportunity.pendingTasksCount \$>

Project Merge Keys

<\$project.name\$>

<\$project.modifyDate\$>

<\$project.assignedTo.contact.name\$>

<\$project.extra1\$>

<\$project.extra2\$>

<\$project.extra3\$>

<\$project.extra4\$>

<\$project.extra5\$>

<\$project.extra6\$>

<\$project.extra7\$>

<\$project.extra8\$>

<\$project.extra9\$>

<\$project.extra10\$>

<\$project.extra11\$>

<\$project.extra12\$>

<\$project.extraDate1\$>

<\$project.extraDate2\$>

<\$project.extraDate3\$>

<\$project.startDate\$>

<\$project.details\$>

<\$project.statusString\$>

<\$project.createDate\$>

<\$project.completeDate\$>

<\$project.category.name\$>

<\$project.currentPipeline.name\$>

<\$project.currentPipelineStage.name\$>

<\$project.keywordsString\$>

<\$project.nextPendingTask.name\$>

<\$project.nextPendingTimeblock.name\$>

<\$project.lastNote.name\$>

<\$project.lastTask.name\$>

<\$project.lastTimeblock.name\$>

<\$project.pendingTasksCount\$>

<\$project.pendingTimeblocksCount\$>

<\$project.allContactsAsString\$>

<\$project.allOrganizationsAsString\$>

Date formats

There are different formats you can apply to a date merged key. To do this, you have to just append the format to the end of the date merged key.

<\$rightNow.preferredDateFormat\$>

For preferred date format, you can select one of the following:

preferredDateFormat
preferredMediumDateFormat
preferredLongDateFormat
preferredLongDateTimeFormat
preferredTimeFormat
preferredDateTimeFormat

Daylite uses the format specified in your International System Preferences while displaying the date.

Merge keys for form fields

You can perform both internal and external merging using the merge keys for form fields. You can make your own merge keys for form fields since they can be anything the user sets as a form field within a form.

The merge keys for a form field are structured as such,

<\$form.NameOfFormField\$>

So, for instance, if you have a form field named, Hair Color, the merge key would be,

<\$form.Hair Color\$>

To merge a form field

1. Select a contact.
2. In the Detail pane, click the Forms tab.
3. Highlight the form whose form field you wish to merge.
4. Choose Actions > Merge and select how you wish to do the merge.
5. In the Merge sheet, enter the appropriate information. Keep in mind the following:
 - To specify a template that contains the form field merge keys, click Set...Browse to the location of the template, and click Choose.
 - To specify a location to save the merged document, click Set...Browse to the location where you wish to save the merged document and click Choose.
 - If you want the merged document to be named differently than the template, then specify a Filename.

- Select an action in the Action menu.
 - If your Action is "Open in Email Client" or "Email Right Away," enter a subject for the email message.
6. Click Merge.