

Movers Suite

User Guide

User Guide to Bookmarks

Setting up, understanding and using Bookmarks

User Guide to Bookmarks

Version 3.6.3 (March 2008)

Copyright

Copyright © 1997-2009 by Mover's Suite Software, LLC. All rights reserved.

Trademarks

MoversSuite is a trademark of Mover's Suite Software, LLC.

Microsoft and Microsoft Windows are registered trademarks of Microsoft Corporation.

All other product names used are trademarks of their respective owners.

Notice

The material in this document is for information only and is subject to change without notice.

While reasonable efforts have been made in the preparation of this document to assure its accuracy, Mover's Suite Software LLC assumes no liability resulting from errors or omissions in this document, or from the use of the information contained herein.

Mover's Suite Software, LLC reserves the right to make changes in the product design without reservation and without notification to any person or entity.

Edition

March 2008

Copyright © 1997-2009 by Mover's Suite Software, LLC. All rights reserved.

Printing Information

Printed in the United States.

Technical Support

If at any time you experience problems with Mover's Suite Software, we encourage you to contact us as follows:

Toll free: 1.866.750.7255

Phone: 1.970.256.1616

Fax: 1.970.256.1650

Website: www.moverssuite.com

Support: support.moverssuite.com

Table of Contents

BOOKMARKS	4
ACCESSING BOOKMARK FILES	6
Location of Bookmark Files	6
User Access to Bookmark Files	9
Bookmark File and User Access Setup	11
WORKING WITH BOOKMARK DOCUMENTS	13
Viewing Bookmark Documents	13
Bookmark Fields Defined	14
Viewing Bookmark Fields	18
Managing Bookmark Fields	21
Troubleshooting Bookmarks	24
Additional Notes on Bookmarks	26

Bookmarks



Bookmarks are a simple and easy way to transfer MoversSuite data to a Microsoft Word document. Using an integration API that is built into MoversSuite, data is transferred to predefined text fields (bookmarks) within a Microsoft Word file. Once the program is launched from the main menu bar within the MoversSuite application, a separate Microsoft Word window will open with all the defined bookmark references replaced with actual data. From this window, the file can be treated as any other Microsoft Word document where it can be edited, saved to disc, printed, emailed, etc.

Using bookmark files, one can provide customized letters ready to be sent out, or create pre-filled forms, professionally displaying the details of an order request. These and other documents can be created with little effort after learning the basics of bookmarking fields and files.

Illustrated below is just one of the unlimited ways that bookmark files can be used. The bracketed items are the bookmarked data fields that are replaced with actual MoversSuite data when the application renders the Microsoft Word file.

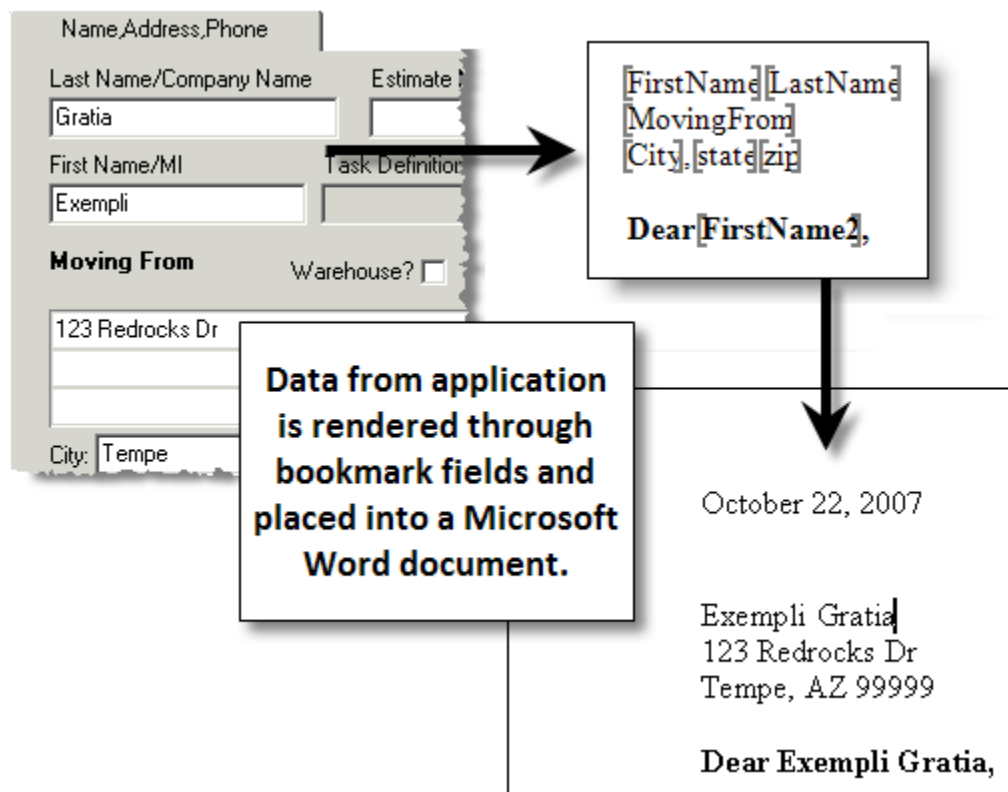


Figure 1: Bookmark rendering process

The benefit of automatically creating custom reports, forms, and letters on the fly is easily identifiable, and MoversSuite will continue to add to the list of available bookmark fields.


In the following sections, one can learn how to define and render files containing bookmarks, add bookmark fields from the available list, and render these file through the MoversSuite application.

Important: Microsoft Word 2003 or Microsoft Word 2007 must be set up on your application server and be accessible by MoversSuite. Refer to the [Welcome to MoversSuite Software](#) topic for further requirements.

Familiarity with Microsoft Word 2003 and/or Microsoft Word 2007 and the MoversSuite application and related administration tools is beneficial to get the most of this guide.

This document references **Microsoft Word 2007** for its examples, however, a user can also manage bookmark documents within Microsoft Word 2003. For more information on either of these versions, refer to [Microsoft Office Online](#) and to the **Word Help** available within each product.

The Microsoft Word 2007 application will accept documents created of either type.

Note: The list of available bookmark fields can be found at support.moverssuite.com as well as within the Microsoft Word icon () above.

Accessing Bookmark Files

The term “Reports” is used generically to describe all forms, letters, reports, and other files that can be defined within MoversSuite. All sections refer to the **Reports** and **Report Profile** setup areas within the MoversSuite Administration - web and Mover’s Suite Administration.

The information presented in this section will educate a user on where to place bookmark documents and how to make administrative changes to allow MoversSuite and its user access to bookmark documents.

Location of Bookmark Files

Bookmark files are physical files that exist on the same application server as MoversSuite application. An administrator can place these files anywhere on the server that the MoversSuite application can access. It is suggested that they reside within a folder entitled “mssShare” within the server’s directory structure.

Although this directory is updated during the installation process of MoversSuite software, any custom files will not be overwritten. Further, files setup in the subfolder of “mssLetters\Custom” will not be deleted or altered in any way by the installation process.

Listed below is the standard, accepted location of files created outside of MoversSuite. The files located within the Custom folder will not be overwritten when updates occur.

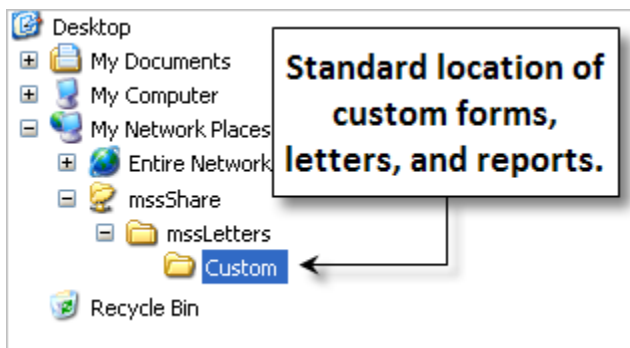


Figure 2: Custom folder on the user's application server

One way to identify which folder is being referenced by the application for bookmark files is to lookup the **Reports** setup information within the administration setup.

Location of Bookmark Files

1. Access **Mover’s Suite Administration**,
2. Select the **Common > Reports > Reports > Reports** setup,

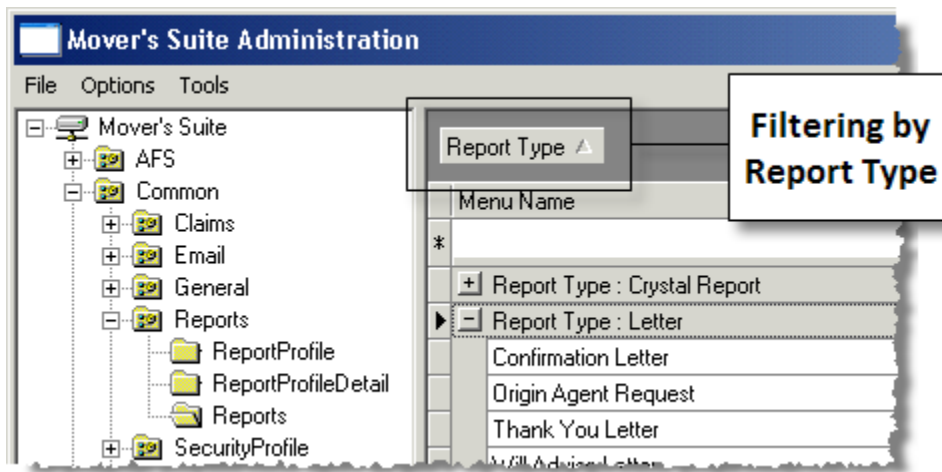


Figure 3: Reports setup section within the Mover's Suite Administration with Report Type filtering in effect

3. Locate those records with a **Report Type** of "Letters". A user can click and drag the Report Type column heading into the "Drag a column header here to group by that column" row above to group by this type.

Sample Reports setup of bookmark documents is displayed below:

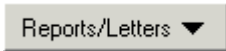
Drag a column header here to group by that column			
Menu Name	Report Name	Report Path	Report Type
* Click here to add a new row			
Sample	Sample.doc	\\Server\mssShare\Reporting\Version3_5_4\mssLetters\Custom	Letter
Confirmation	Confirmation.doc	\\Server\mssShare\Reporting\Version3_5_4\mssLetters\Custom	Letter

Figure 4: Reports setup example within the Mover's Suite Administration

The general properties of a bookmark file are listed in the table below. Read more about these settings within the [Reports](#) topic.

Reports Table Properties as they apply to Bookmark Files

Field Name	Description
Menu Name	The name of the file that appears in the MoversSuite application.
Report Name	The name of the physical file as it exists on one's system. For bookmark files, they will need to have the filename extension of .doc (Microsoft Word 2003) or .docx (Microsoft Word 2007).

	Word 2007).
Report Path	This is the path (directory) that is a prefix of the Report Name. A path similar to \\Server\mssShare\Reporting\Instance\mssLetters\Custom\ may be in use, where the Server and Instance (both in red) would be unique to one's system and may represent a specific setup or version of MoversSuite application, respectively.
Report Type	Must be set to "Letters" to have bookmark files rendered as Microsoft Word documents. It also instructs the program to make the file available through the application's main toolbar option of Reports > Letters .
System ID	<p>This field may contain a four-character identifier that is used to link the document to one of the several report buttons found within MoversSuite.</p> <p>For example, assigning a System ID of "CLAM" to will allow for the document to be made available through the Report/Letters button within the Claims interface.</p> 
Render Type	This field should be left blank for bookmark files.

Tip: Another way in which to find the source location of a file is to launch an existing bookmark file from within MoversSuite, and then execute a **Save As** option when the Microsoft Word window appears. Microsoft Word will attempt to save the file to the same location that is the source of the original document; which is also what is defined in the Reports setup for the document.

User Access to Bookmark Files

Access to forms, letters, and reports is controlled through a **Report Profile**. Reports can be linked to a profile which can be assigned to a user. If either the user's Report Profile does not access a particular report, or if the Report Profile is not linked to the report, then the user will not be able to launch or view it from within the application.

So, in addition to knowing which reports are set up on one's system, a user needs to identify which reports can be run from MoversSuite.

Identifying User Access to Reports

Use the MoversSuite Administration - web to view the Report Profile in use for a user:

1. In **MoversSuite Administration - web**,
2. Open **User Setup > Personnel**,
3. Locate and select the **Employee**,
4. Select the **User Setup** tab,
5. View the **Report Profile** of the user,

The screenshot shows a web-based user setup interface. At the top, there is a dropdown menu for 'Employee' with 'REPORTER - 100' selected and a 'New' button. Below this are several tabs: 'General', 'Contact', 'Dispatch', 'User Setup' (which is highlighted), 'Roles', and 'Safety'. Under the 'User Setup' tab, there are four input fields: 'Username' (empty), 'Password' (masked with dots), 'Security Profile' (set to 'Default'), and 'Report Profile' (set to 'Administrator'). At the bottom of the form are three buttons: 'Edit', 'Save', and 'Cancel'.

Figure 5: User Setup section of the Personnel setup from within the MoversSuite Administration - web

Reference the Report Profile Detail setup within the administrative setup to determine which documents can be accessed:

6. In **Mover's Suite Administration**,
7. Open the **Common > Reports > ReportProfileDetail > Report Profile Detail** setup,
8. Locate those records that match the user's **Report Profile**. A user can click and drag the Report Profile column heading into the "Drag a column header here to group by that column" row above to group by this type.

Following the above procedure will allow an administrator a see which reports are available for users through the Report Profile setting.

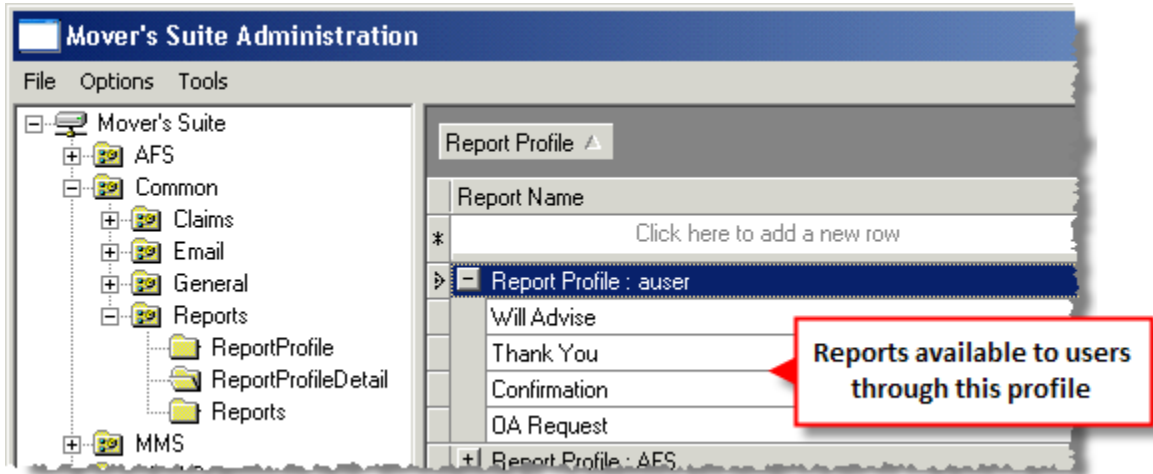


Figure 6: Report Profile Detail table setup within Mover's Suite Administration

The reports available to the sample profile illustrated above will appear as follows:

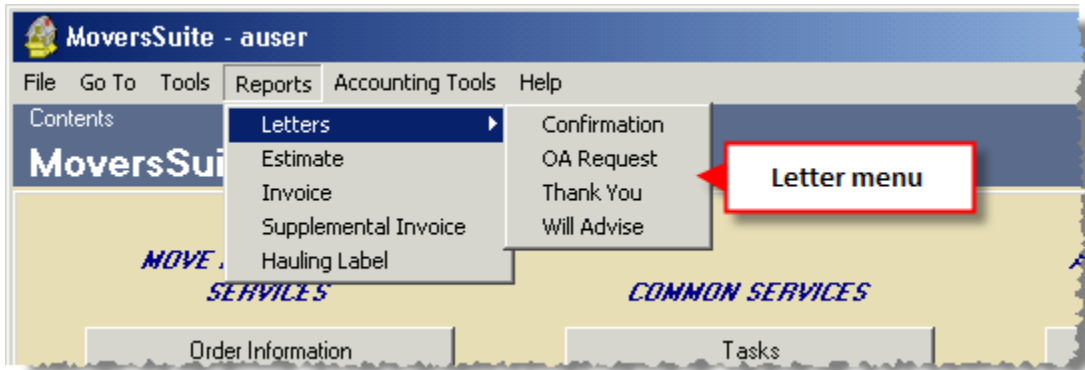


Figure 7: Sample access to Letters within MoversSuite

Learn more about adding documents and updating user's Report Profile to access bookmark documents within the [Bookmark File and User Access Setup](#) section.

Bookmark File and User Access Setup

The following procedure will allow an administrator to add bookmark documents to the list of available Reports and to allow users to access them through their Report Profile settings.

Updating MoversSuite to recognize bookmark documents

1. Open the **Mover's Suite Administration**,
2. Access the **Common > Reports > Reports > Reports** setup,
3. Enter **Menu Name**, **Report Name**, **Report Path**, **Report Type**, and **System ID** using the [Reports Table Properties as they apply to Bookmark Files](#) table as a guide,
4. Tab through the **Render Type** field to save the record,
5. **Repeat** Steps 3 and 4 to add other bookmark documents to the list of Reports,

Modifying a user's profile to recognize bookmark documents:

6. Access the **Common > Reports > ReportProfileDetail > Report Profile Detail** setup,
7. Select a **Report Profile** (users that can access the report) from the available list. Define new profiles within the **Report Profile** setup through **Common > Reports > ReportProfile**, if needed. Refer to the [MoversSuite Administration](#) topic for more information on defining new Report Profiles,
8. Select the newly defined report title from the list of **Report Names**,
9. **Repeat** Steps 7 and 8 assign other bookmark documents to other user's Report Profiles.

Upon successfully adding a document to the list of Reports and assigning the document to a user's Report Profile, the user will be able to access them through the **Reports > Letters** menu options available within MoversSuite.

If personnel records need to be updated to reference a specific Report Profile, then an administrator can follow the procedure listed below.

Updating the Report Profile for personnel

1. In **MoversSuite Administration - web**,
2. Access the **User Setup > Personnel > Personnel** setup,
3. Locate **Employees** from the drop-down list,
4. Select the **User Setup** tab,
5. Press the **Edit** button to enable data fields to be modified,
6. Select the **Report Profile** from the provided list,
7. Press **Save** to keep the changes to this record,
8. **Repeat** Steps 3 through 7 to update the Report Profile for other employees.

Once defined and accessible a user can generate bookmark documents from within MoversSuite. Read more about this in the [Viewing Bookmark Documents](#) section.

More information on adding and updating the documents is available within the online help under the [Reports](#) topic.

Working with Bookmark Documents

There are a number of files included with each release of MoversSuite software that contain bookmark fields. One of these is a move *Confirmation Letter*, and it is available within the listing of standard, provided reports. This file will be used as an example within this section.

The information presented in the [Accessing Bookmark Files](#) section provides enough information to allow an administrator to locate the **Confirmation.doc** file, reference it correctly in the Reports setup, and modify user access to render the file within the application.

Use a sample document to work through the following sections.

Viewing Bookmark Documents

Bookmark files are referenced through the MoversSuite application in two different ways: Through the main application's toolbar by **Reports > Letters** and through **buttons** available within the application. In either case, the program will render the data for the record that is selected, or active, within the application and send it to a Microsoft Word document.

Viewing Bookmark Document within MoversSuite

1. Access the **MoversSuite** application,
2. Use the **Find** feature to select a record in any module and make it active within the application,
3. Select **Reports > Letters** from the main toolbar,

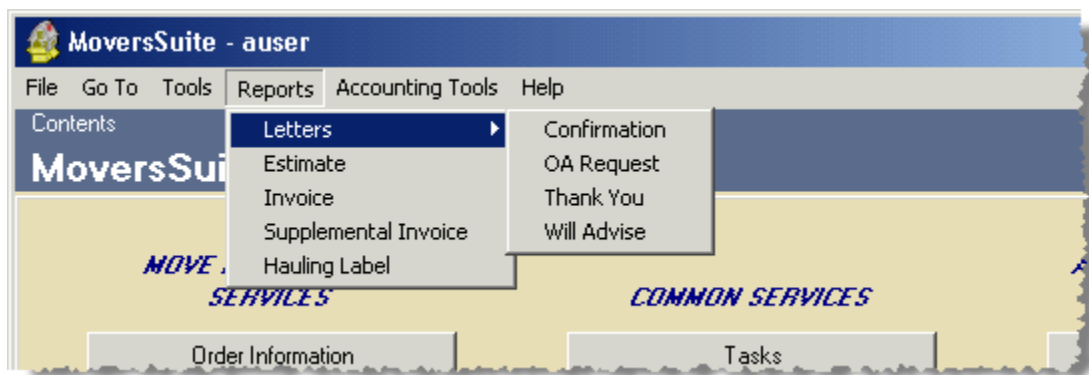


Figure 8: Accessing bookmark documents through the **Reports > Letters** menu

4. **Choose** a report title from the list. For example, select "Confirmation Letter" (or other document), to continue using the previous example. Once a selection is made, a window should open containing a Microsoft Word document with data from the active record filled-in,

Assuming that the *Confirmation Letter* was chosen, then the user will see Microsoft Word document similar to that displayed below. The date, address, and other data were automatically inserted into the document.

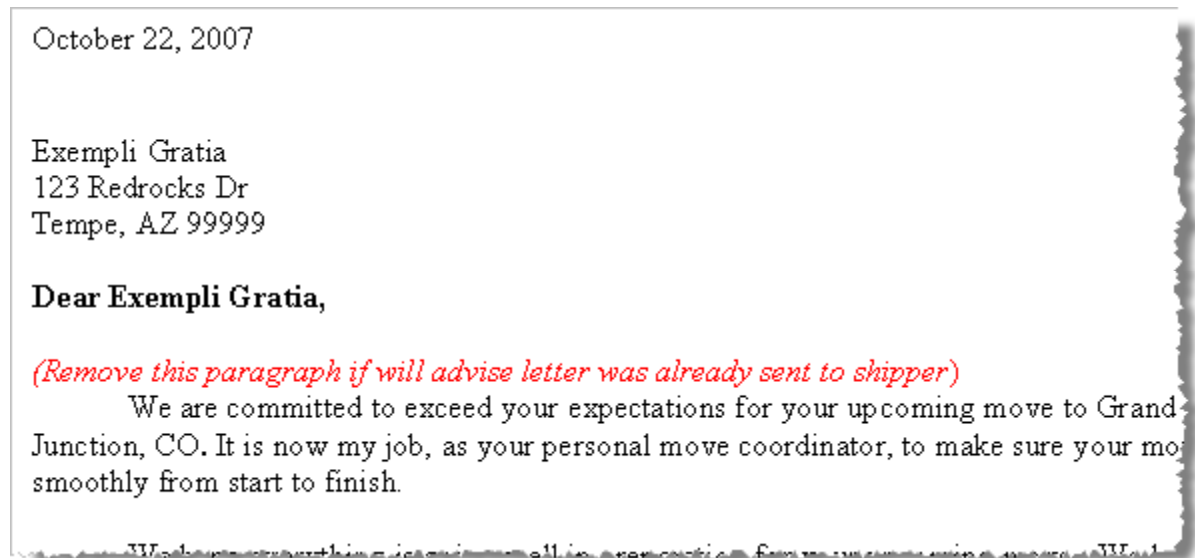


Figure 9: Sample confirmation letter.

Note: The version of the Microsoft Word that is used to render bookmark documents from within the MoversSuite application server may render documents slightly differently from the one that is typically used from a personal computer.

Bookmark Fields Defined

A bookmark is simply a point of reference within a Microsoft Word document that can be used for a number of purposes, including being a target for a hyperlink or table of contents. It can also be used as a marker that a separate application, such as MoversSuite, can use to insert database values. This latter use is the focus of this document.

MoversSuite will recognize a number of bookmark fields within a Microsoft Word document and will replace them with data from the order being referenced at the time that the file is generated.

All available bookmarks are contained within in the **Available Bookmarks** document (available at support.moverssuite.com or near the top of the **Bookmarks** topic) and each can be placed within a user's own Microsoft Word documents by following the procedure within the **Managing Bookmark Fields** section.

To effectively use the bookmarks a user should understand the attributes of bookmark fields.

MoversSuite's Bookmark Field Attributes

- They are a cross-reference between database field values and Microsoft Word documents
- They must be unique within each document
- They are not case-sensitive
- Must be an exact match to what the MoversSuite application expects

- They can only be used once within each document

The last attribute is a considerable limitation therefore the application has been modified to have multiple bookmark fields for several key fields. The order record number, for example, may be needed more than once in any particular document, so bookmarks of “ordnum” and “ordern” have been created to pull the record’s Order Number; this allows a user to pull the value up to two times per document.

Duplicate bookmark fields

The table below lists all MoversSuite data values that can be referenced by more than one bookmark field; allowing a user to display the data multiple times within a single document.

MoversSuite Data	Available Bookmark Fields
Order Number	ordnum ordern
Shipper Name	<i>Complete shipper name:</i> shipper fname FirstName2 <i>Additionally, the shipper’s first and last name can be referenced through the following:</i> FirstName LastName
Shipper’s Origin Address	<i>Complete address for origin address:</i> oaddress <i>Additionally, the following values can be used to make up the origin address:</i> MovingFromAddr1 (and MovingFrom) MovingFromAddr2 MovingFromAddr3 city (and city2 and ocity) zip OriginCountry
Shipper’s Destination Address	<i>Complete address for destination address:</i> daddress <i>Additionally, the following values can be used to make up the destination address:</i>

	MovingToAddr1 (or MovingTo) MovingToAddr2 MovingToAddr3 Dcity (or DestCity) Dzip DestinationCountry
Booking Agency Salesperson	Sales SalesPerson
Booking Agency Coordinator	coord coord2 coord3
Booking Coordinator's Email	email1 email2
Origin Agency's Phone Number	oanumber oaphone
Claim Adjuster	ClaimAdjuster1 ClaimAdjuster2 ClaimAdjuster3

Microsoft Word also requires that bookmark fields be a single word in length. Multiple word titles, such as "Shipper Name", are not allowed. The program also ignores case, so "Shipper" is treated the same as "shipper" (not capitalized).

There are also bookmarks defined by MoversSuite that will list more than a single data values. The following bookmark fields can be referenced to retrieve the listed data.

Bookmarks that retrieve multiple data values

Bookmark Field	Description
ClaimItems	<p>This bookmark will retrieve all Claim Items records for a particular Claim record.</p> <p>The following data will display for each record associated to a Claim when this bookmark field is in use:</p> <ul style="list-style-type: none"> • Description • Claim Damage Type • Claim Amount • Settlement Amount

<p>QuoteTable</p>	<p>When this bookmark is selected, all Quotes and all Quote Detail records associated to an Order will be listed.</p> <p>The following data will appear for each Quote record (by detail or grouped record):</p> <ul style="list-style-type: none"> • Quote Description • Charge • Rate • Quantity • Vendor Quoted Charge • Vendor Actual Charge • Rate Type • Item Code • Service Provider Type
<p>Stores</p>	<p>Data related to all jobs associated to a Special Services order within the Store Information tab will display when this bookmark field is referenced.</p> <p>The following data will display for each record associated to an Order when this bookmark field is in use:</p> <ul style="list-style-type: none"> • Install Date • Install Time • Store Name • Store Number • Store Address • Store City, State and Zip • Store Contact • Store Phone
<p>VesselAndFlightInfo</p>	<p>The following data will display for each record associated to an International Order when this bookmark field is in use:</p> <ul style="list-style-type: none"> • Vessel/Flight • Estimated Departure Date • Actual Departure Date • Estimated Arrival Date • Actual Arrival Date • Destination Port

Viewing Bookmark Fields

Bookmark fields are text fields that Microsoft Word uses as a reference point within a document to insert database values for an Order into. They are hidden from general viewing and a Microsoft Word option must be turned on in order for a user to recognize them within their documents.

Use the following procedure to identify which bookmarks are currently established within a document.

Enabling the Show Bookmark Option

1. Open **Microsoft Word** program,
2. **Open** a document containing bookmark fields (e.g. "Confirmation.doc"),
3. Turn on the **Show Bookmarks** option as follows:

In Microsoft Word 2003:

- a. Select **Options** from the applications toolbar by **Tools > Options**,
- b. Click on the **View** tab,
- c. Check the box entitled **Bookmarks** within the Show section,
- d. **Close** the dialog.

In Microsoft Word 2007:

- a. Click on the **Microsoft Office Button**



- b. Click on the **Word Options**,
- c. Select **Advanced** from the list,
- d. Place a check next to **Show bookmarks** in the Show document content section,

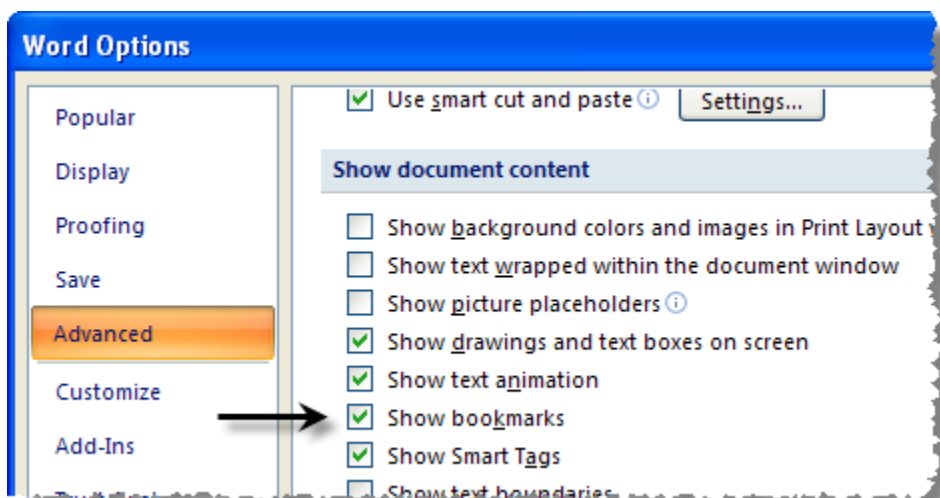


Figure 10: Word Options dialog

- e. Press **Ok** to keep the change and to close the Word Options dialog.

Upon completion, all bookmark fields within the document will appear encapsulated in braces.

Bookmark field with **Show Bookmark** option turned off:

shipper

Bookmark field with **Show Bookmark** option turned on:

[shipper]

The following example (Figure 11), illustrates the visible bookmarks as seen within the **Confirmation.doc** file.

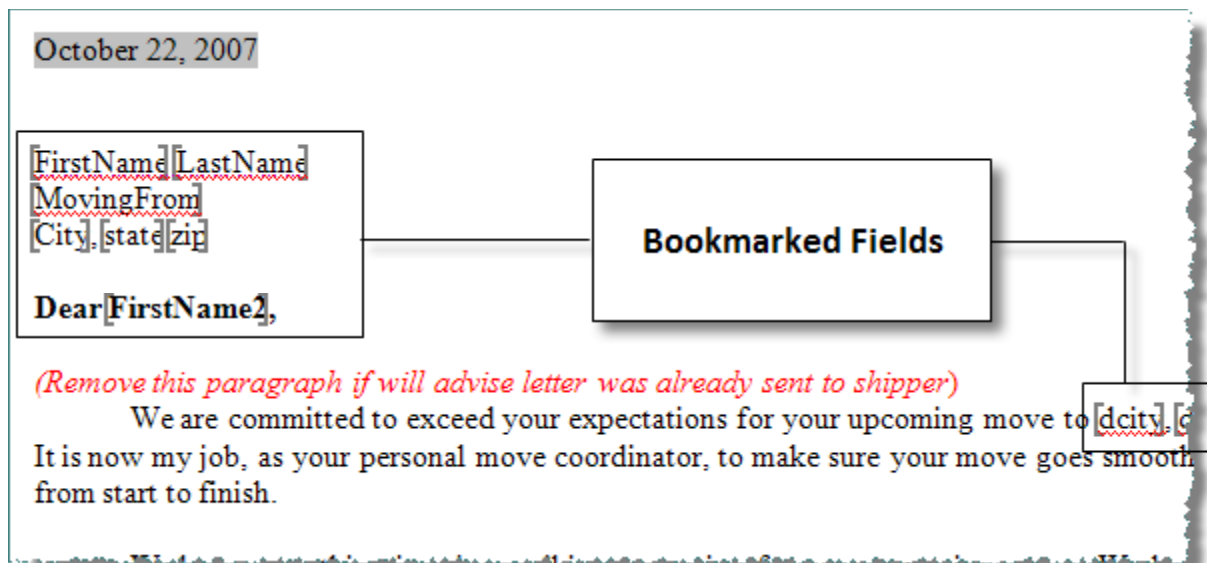


Figure 11: Confirmation letter document sample

Bookmark Dialog

A user can access the Bookmark dialog within Microsoft Word to see all bookmarks in use for the particular document.

View Available Bookmarks within a File

1. Open a **Microsoft Word** document that contains bookmarks,
2. Access the **Insert** options,
3. Click on the **Bookmarks** button within the Links section and the Bookmarks dialog box should appear,

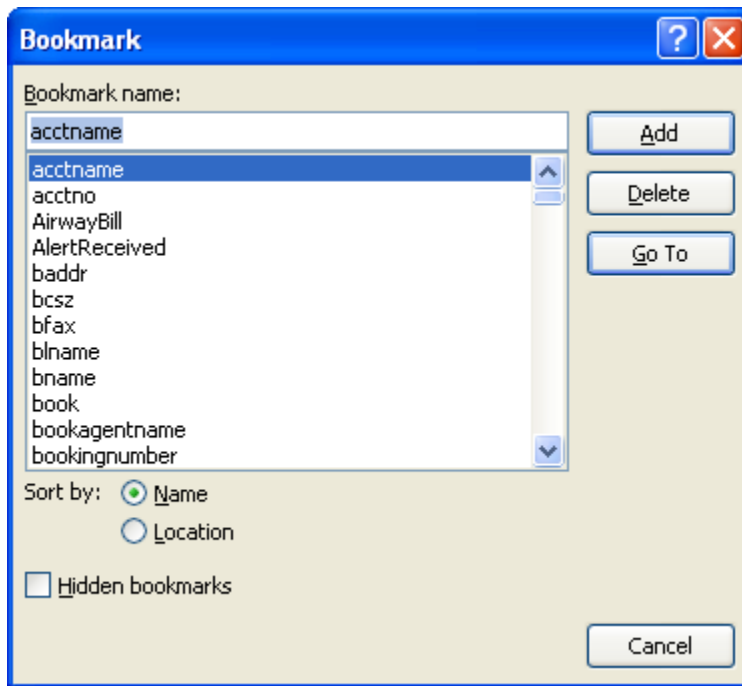


Figure 12: Bookmark dialog

4. **Scroll** through the list of bookmarks, by Bookmark name,
5. Press **Cancel** or **Close** to exit the dialog.

The items listed within the Bookmark dialog are all bookmark fields in use for the opened document. Use the features described in the table below to become familiar with them.

Bookmark Dialog Options	Description
Add	Allows for the user to add a bookmark field to the place they are referencing within the document. Any point within the document can be bookmarked and can contain multiple bookmark references, as well.

Delete	Pressing this button will delete whatever bookmark is being referenced within the Bookmark name field. NOTE: Deleting the bookmark reference will not remove the actual text that it represents.
Go To	This will take the user to the location of the bookmark within the document.
Sort by	Sorts the bookmark table by either its Name or its Location within the document. To see the first named bookmark within the document a user would select Location.
Hidden bookmarks	When this option is checked it will display all bookmarks, even those used internally by Microsoft Word.

The Bookmark dialog will be referenced in the following section that covers working with the bookmark fields.

Managing Bookmark Fields

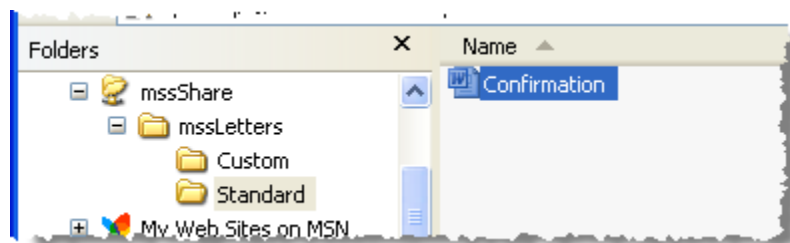
A user can either edit an existing bookmark document, or they can create one from scratch. More than likely, a user will take an existing bookmark file, modify it, and save it as an entirely different document. Since this is common, illustrating both processes concurrently will be relevant to one wishing to do either.

Adding, Editing, and Deleting Bookmark Fields

This section describes how a user can add, edit and delete bookmark fields, followed by more information on these fields.

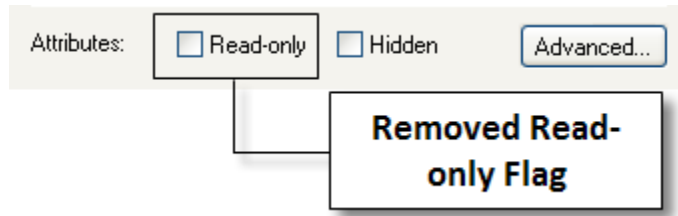
Adding, Editing, or Deleting a Bookmark Fields

1. **Locate** the source file directory using **Windows Explorer (Start > Accessories > Windows Explorer)**. **Note:** Refer to the [Accessing Bookmark Files](#) section for the first two steps, if necessary,
2. **Select** the file to edit,



3. **Remove** the read-only attribute from the file
 - a. Select the file with a **right-mouse** click and the Confirmation Properties dialog box will appear,

- b. Make sure there is not a check in the box next to the **Read-only** option within the Attributes section,



- c. Click on **OK** to keep the change and to close the Confirmation Properties dialog.

4. **Open the file** with Microsoft Word,
5. **Make changes to the document**, as follows

If adding a bookmark field

- Select** the location or text field within the document,
- Access the **Bookmark** dialog (**Insert > Bookmark**),
- Type in the **Bookmark name**,
- Press the **Add** button to keep the change and to close the dialog.

-OR-

Copy (Ctrl + C) the bookmark from the list of available ones within the **Available Bookmarks** document (available through support.moverssuite.com or at the top of the **Bookmarks** topic) and **Paste** (Ctrl + V) it into the document at the desired location.

If editing a bookmark

- Click** on the text field or location within the document that contains the bookmark field,
- Open the **Bookmark** dialog (Insert > Bookmark),
- Edit the entry by changing the **Bookmark name** value,
- Press the **Add** button to keep the changes and to exit the Bookmark dialog.

If deleting a bookmark

- Click** on the text field or location within the document that contains the bookmark field,
- Open the **Bookmark** dialog (Insert > Bookmark),
- Press the **Delete** button to keep the changes and to exit the Bookmark dialog.

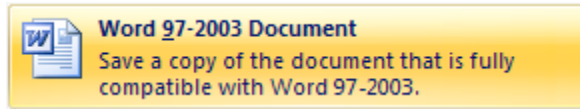
NOTE Changing or deleting a bookmark field can also be accomplished through the Bookmark dialog. Use the dialog to locate the item to change, or to delete, by Bookmark name instead of having to locate the text field first.

6. **Save the file**

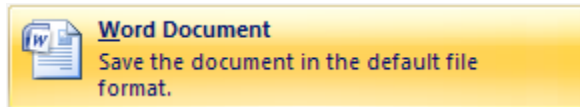
- Press the **Microsoft Office** button for Microsoft Word 2007 documents or select **File > Save As** from the Microsoft Word 2003 toolbar,



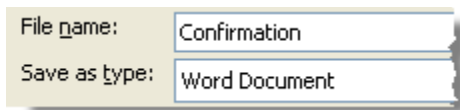
- b. Press the **Save As** option,
- c. If the application server is Microsoft Word 2003, then choose the **Word 1997-2003 Document** option



If the application server is Microsoft Word 2007, then choose the Word Document option



- d. **Select** the correct folder when the Save As dialog box appears,
- e. Enter the **File name**,



- f. Press **Save** to keep the file to the named folder and to exit the dialog.

7. **Exit** Microsoft Word,
8. **Set the file property to be read-only** by repeating the steps above and making sure that the read-only attribute box is checked. Setting the **read-only attribute** will protect the contents of the bookmark document. When the document is rendered through MoversSuite, the user will be forced to save the document to a different file name and/or location, if they wish to make and save changes,
9. Update the **Report** setup using the administrative tools, as illustrated in the [Accessing Bookmark Files](#) section, if needed,
10. Verify that the document works correctly by [Viewing Bookmark Documents](#).

When the document is generated through MoversSuite, the user has a variety of options available for saving and disseminating the file. In fact, all Microsoft Word options are available to the user, including saving, emailing, and printing.

Troubleshooting Bookmarks

This section explains the details of some common errors and problems that a user may encounter.

Bookmark Field Replacement

When the program renders the bookmark field, one of the following states will occur as indicated in the table below.

Field Replacement Outcome	Description/Resolution
Replaced with <u>Correct Data</u>	The bookmark field was valid and referenced correctly by the application.
Replaced with <u>Incorrect Data</u>	An incorrect bookmark field was referenced.
Replaced with <u>Blanks</u>	This indicates that no data was retrieved for the record. Verify that the user is accessing a record, as evident by the presences of an Order Number value within the heading bar. If a valid record is being referenced, then verify that the correct bookmark field is being referenced.
<u>Nothing Happens</u>	If the text statement that represents a bookmark remains, then the bookmark reference was either removed, invalid, or is a duplicate of another.

File Opening

If the menu contains a report name that cannot be found, then an “Error opening Microsoft Word document...” error message will appear. The error will also indicate the name of the file it was attempting to open (Report Path plus the Report Name).

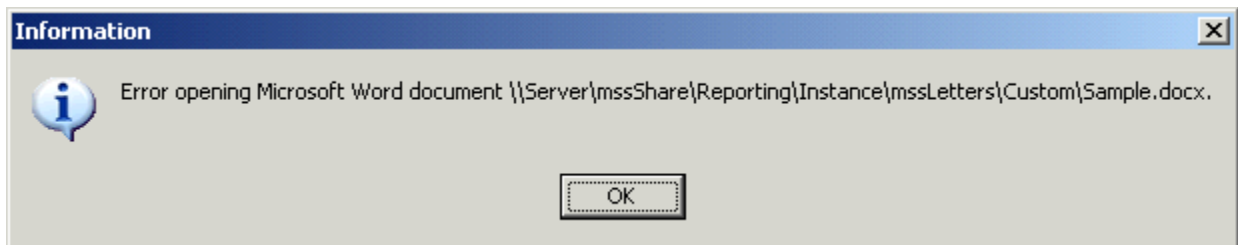


Figure 13: File open error

To correct the problem, the user may need to do one of the following

- Check for typos in the document name
- Verify that the file exists in the desired location

- Verify that the file is accessible to the application

Report Missing from Menu

If the report name is missing from a menu, then check the following

- Is the document setup correctly within the Reports setup?
- Is the Report associated to a Report Profile record?
- Is the user accessing the correct Report Profile record?

Additional Notes on Bookmarks

Keep the following in mind when updating MoversSuite bookmark fields:

- When adding or editing a bookmark field, make sure that it matches exactly to those listed in the **Available Bookmarks** document (available through support.moverssuite.com or near the top of the **Bookmarks** topic). When possible use the attached template to copy (**CTRL + C**) and paste (**CTRL + V**) desired fields from it into one's documents. Doing so not only copies the text, but copies the bookmark reference as well.
- Verify that the bookmark is not in use before you add one. If a duplicate bookmark is entered, then it will move the bookmark reference from the previous location to the new location within the document. Microsoft Word allows a bookmark field to be used only once.
- Deleting the text reference of a bookmark field deletes the bookmark, as well. To delete the bookmark only, one must use the Bookmark dialog (**Insert > Bookmarks**).

Example of Adding Bookmarks to a Document

Assume that a user wishes bold text items listed below (Figure 14) to appear within a letter automatically generated by MoversSuite:

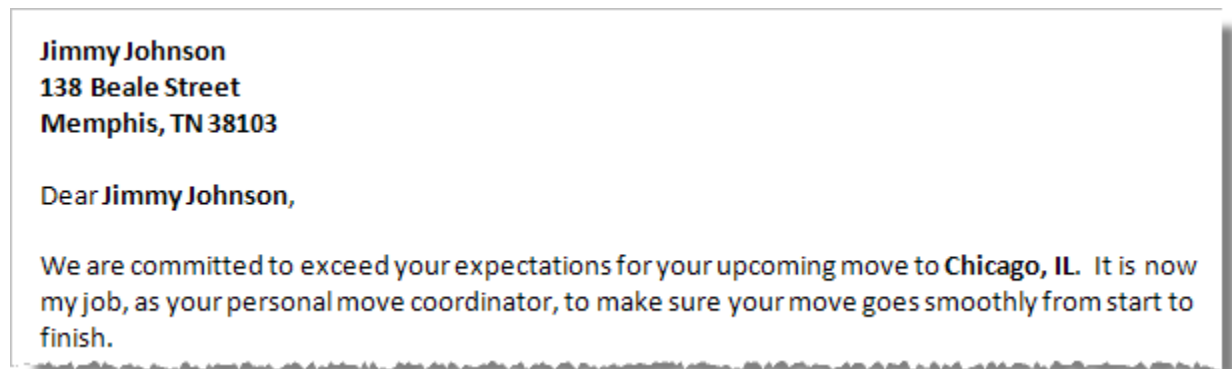


Figure 14: Sample confirmation letter

The data from the sample could be pulled from the **Name, Address, Phone** tab:

Figure 15: Name, Address, Phone tab section illustrating desired data fields

A user can find the corresponding bookmarks from those provided within the **Available Bookmarks** document and place them in their own Microsoft Word document:

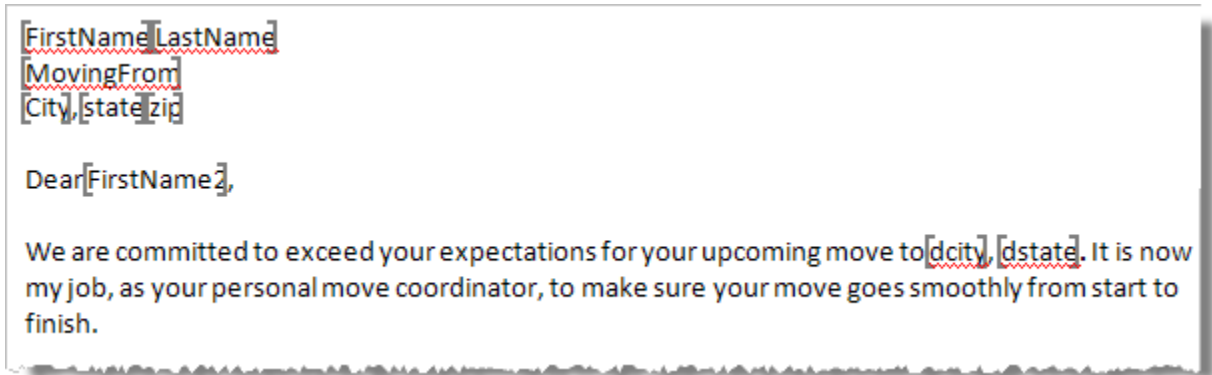


Figure 16: Confirmation letter with bookmark fields placed within

The **Bookmark** dialog (Insert > Bookmark) would appear as displayed below:

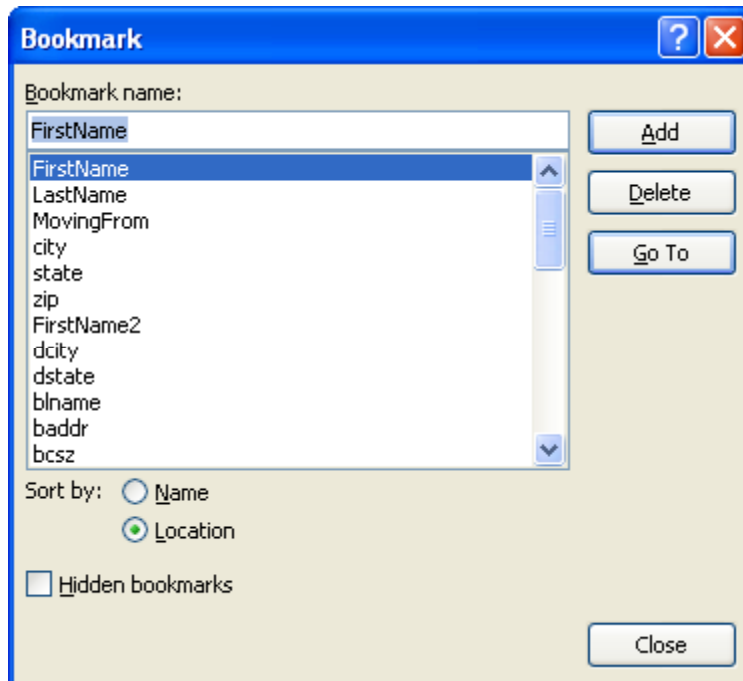


Figure 17: Bookmark dialog for Sample confirmation letter