

## Merging PDF Templates

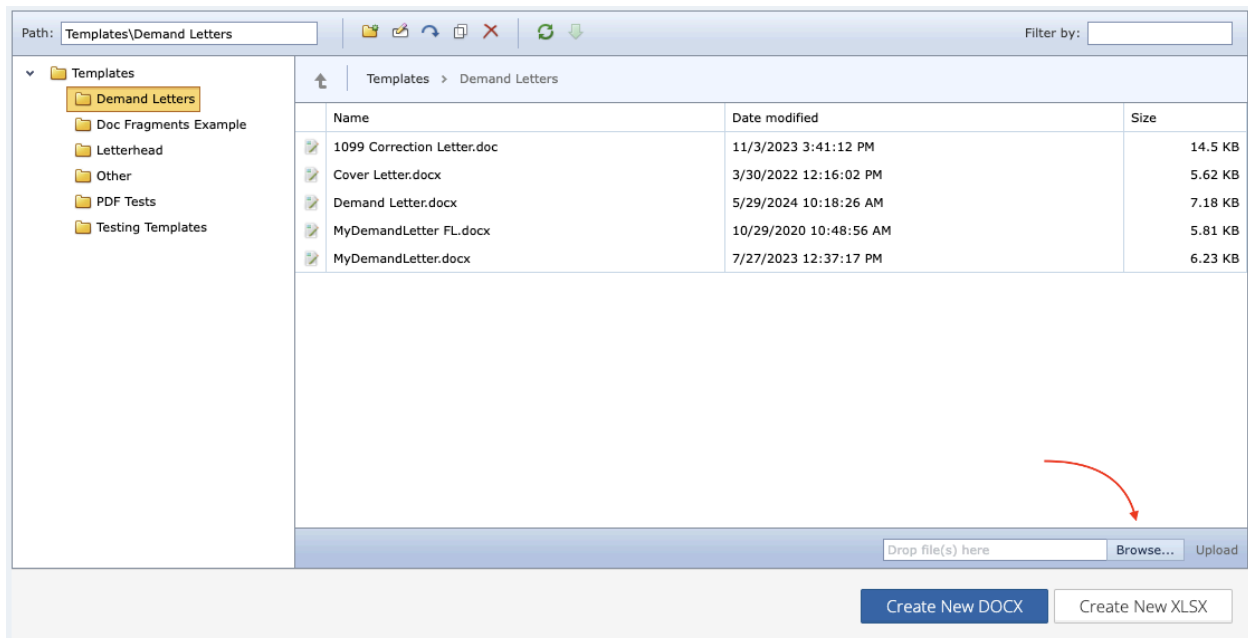
### Overview

In this document, we'll be looking at the creating PDF document templates in CMPOnline. This can be helpful when the court requires that we use their PDF form when submitting documentation to them, such as a proof of service.

### Uploading your PDF

- Navigate to Administration > Setup > Document Templates.
- Click "Browse", and select your PDF from your computer to upload.
- Once uploaded, double click your template to begin editing.

*NOTE: If there is any static data you wish to be hardcoded into your PDF form prior to merging that will not change, please enter said data and save into the PDF form fields prior to uploading into CMPOnline.*

The screenshot shows a web-based file manager interface. The path is 'Templates\Demand Letters'. On the left, a tree view shows folders: 'Demand Letters', 'Doc Fragments Example', 'Letterhead', 'Other', 'PDF Tests', and 'Testing Templates'. The main area displays a table of files:

Name	Date modified	Size
1099 Correction Letter.doc	11/3/2023 3:41:12 PM	14.5 KB
Cover Letter.docx	3/30/2022 12:16:02 PM	5.62 KB
Demand Letter.docx	5/29/2024 10:18:26 AM	7.18 KB
MyDemandLetter FL.docx	10/29/2020 10:48:56 AM	5.81 KB
MyDemandLetter.docx	7/27/2023 12:37:17 PM	6.23 KB

At the bottom of the file list, there is a 'Drop file(s) here' text, a 'Browse...' button (highlighted with a red arrow), and an 'Upload' button. Below the file list, there are two buttons: 'Create New DOCX' and 'Create New XLSX'.

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### Adding Merge Fields

- Navigate to Administration > Setup > Document Templates.
- Find your template, and double click to begin editing.
- Select the PDF Field from the PDF Field Name dropdown you wish to map first.  
*Please note that if your PDF field dropdown doesn't show any fields, it may be because the PDF is corrupt or was built in a very old version of Adobe. In that case, please contact a CMP Representative who can assist with converting your PDF to a newer format. If your PDF field dropdown shows field names that are difficult to find in the PDF, again contact a CMP Representative to help assist in identifying or updating your PDF form fields.*
- Select the corresponding CMP merge field you wish to map to the previously selected PDF field.
- Click "Map Field"
- Test your template by clicking "Test PDF Merge".  
*NOTE: All PDF templates auto-save into the system.*
- After testing properly, your PDF template is ready for packaging.

### Questions?

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