File Hub — Merge Field & Signing Guide

Everything you can type into a Word template, and how the signature and notary pages are built. Updated October 30, 2026.

1. How merging works
2. Order and property fields
3. Buyer / Seller fields
4. Mailing addresses on two lines
5. Letters to each owner (engagement letter)
6. Contacts
7. Custom fields
8. Signing groups and signature pages
9. Notary clauses
10. The Field Reference list
11. Email templates
12. Troubleshooting

1. How merging works

- Type a field name in curly braces anywhere in a Word (.docx) template: `{OrderNo}`. When you click **Generate Documents**, File Hub replaces it with that order's value. Templates live in Settings → Templates.
- Names are **case-sensitive** and have no spaces: `{PropertyCity}`, not `{propertycity}`.
- A **loop** repeats a section once per item. It starts with `{#Name}` and ends with `{/Name}`, each on a paragraph of its own.
- Line breaks inside a value (several people, address lines) come through as real line breaks.
- **Handwriting blanks.** With "Show any blank field as a handwriting blank" checked (the default), any empty field prints as `_____` so you can write it in.
- One file is produced per template, named after the template (`Template Name.docx`, no order number), and downloaded by your browser.

2. Order and property fields

Tag	What it gives you
`{OrderNo}`	Order number
`{PropertyAddress}`	Street address only (number, street, direction)
`{PropertyCity} {PropertyState} {PropertyZip} {PropertyCounty}`	The other property fields, each on its own
`{PropertyCityStateZip}` NEW	"Cleveland, OH 44101" as one line
`{PropertyAddressBlock}` NEW	Two lines: street, then "City, ST Zip". Use it as a mailing address.
`{PropertyDescription}`	Legal description
`{ParcelNos}`	Parcel number(s)
`{ClosingDate}`	From the Closing Date box at the top of the order, written out ("November 12, 2026")
`{SalePrice} {LoanAmount}`	Dollar amounts, formatted

`{SigningDate}`	Outside a loop: the one signing date if every signing group agrees, a note if they differ, blank if none set. Inside a signing loop it means that group's own date (see section 8).
`{SigningGroupsSummary}`	One plain-language line per signing group: who, when, where. For cover sheets.

3. Buyer / Seller fields

"Buyer" also means the Borrower on a refinance. These come from the Contacts tab (the card name, or your "Name on file card" override, is used for the name).

Tag	What it gives you
`{BuyerName}` `{SellerName}`	All parties on that side, e.g. "John Smith and Mary Smith" or "ABC Company, LLC & Jane Roe"
`{BuyerAddress}` `{SellerAddress}` NEW	The mailing address(es) as typed on the Contacts tab, one line. If two parties have different addresses they are separated by a semicolon.
`{BuyerPhone}` `{SellerPhone}` NEW	Phone number(s), separated by semicolons
`{BuyerEmail}` `{SellerEmail}` NEW	Email address(es), separated by semicolons

4. Mailing addresses on two lines NEW

Addresses are typed as **one line** on the Contacts tab. To print one on several lines in a letter, add the word **Block** to the end of any field name.

You type	You get
`{SellerAddressBlock}`	{SellerAddress} with every **comma** turned into a line break
`{BuyerAddressBlock}`	Same, for the buyer/borrower
`{AddressBlock}`	Inside a party loop (section 5): that party's own address
`{CountyMailingAddressBlock}`	Works for any custom field too: {CountyMailingAddress} with commas as line breaks

The rule is simple: every comma becomes a line break, and every semicolon becomes a blank line (so two different addresses stay apart). The one exception is the comma before a state, which stays put. Type the address naturally:

```
Typed on the Contacts tab:    9 Oak Ave, Suite 4, Akron, OH 44301

{SellerAddressBlock} prints:  9 Oak Ave
                              Suite 4
                              Akron, OH 44301
```

> The comma between the city and the state is kept whenever a state follows it (**OH**, or **Ohio** with a ZIP), so **Akron, OH 44301** stays on one line.

If a field named exactly `...Block` already exists (like `{PropertyAddressBlock}`), that field is used as-is.

5. Letters to each owner (engagement letter) NEW

For a letter that goes to each owner at a different address, make one template per address and change only the address tag. Everything else in the letter stays the same.

Template	Address tag at the top
`Engagement letter – property`	{SellerName} {PropertyAddressBlock}
`Engagement letter – mailing`	{SellerName} {SellerAddressBlock}
`Engagement letter – county records`	{SellerName} {CountyMailingAddressBlock}
`Engagement letter – registered agent`	{SellerName} {StatutoryAgentAddressBlock}

On a refinance use {BuyerName} and {BuyerAddressBlock} (the borrower). The last two rows use **custom fields** (section 7): add `CountyMailingAddress` and `StatutoryAgentAddress` in Settings → Merge Fields, then fill them in on the order's Documents tab when you find the address. Check off all the templates in Generate Documents and you get all the letters in one click. A letter whose address is empty prints a handwriting blank, so it is easy to spot.

One letter per owner

If each owner has their own address, loop over the parties instead. Put the loop tags on paragraphs of their own; the letter repeats once per party, one per page:

```
{#Seller_Parties}
{Name}
{AddressBlock}

Dear {Name}:  ...the rest of the letter...
{@$pageBreakExceptLast}
{/Seller_Parties}
```

Inside {#Buyer_Parties} / {#Seller_Parties}	What it gives you
`{Name}`	The party's name ("John Smith and Mary Smith" if a spouse is on title, or the entity's full legal name)
`{Kind}`	Individual or Entity
`{Address} {AddressBlock}`	That party's mailing address; one line, or broken at the commas

`{Phones} {Emails}`	Their phone numbers / emails, separated by semicolons (an entity includes its signers' emails)
`{Signers}`	Entity only: "Name, Title; Name, Title"

6. Contacts

Text fields

One person per line, written like the file card: name (title), company, phone, then that role's note. Add `Emails` to the end to get just the email addresses, separated by semicolons (for example `{SellerAttorneyEmails}`).

Tag	Role
`{BuyerAttorney} {BuyerAgent} {BuyerLender}`	Buyer (Borrower) side attorney, agent/broker, lender
`{BuyerAuthorized} {BuyerContacts}`	Authorized contacts / the buyer people themselves
`{SellerAttorney} {SellerAgent}`	Seller side attorney, agent/broker
`{SellerAuthorized} {SellerContacts}`	Authorized contacts / the seller people themselves
`{SalesRep}`	Your company's sales rep(s)
`{OtherContacts}`	Everyone under Other

Loops (to lay people out yourself)

`Buyer_Contacts` `Buyer_Authorized` `Buyer_Attorneys` `Buyer_Agents` `Buyer_Lenders` `Seller_Contacts` `Seller_Authorized` `Seller_Attorneys` `Seller_Agents` `Sales_Reps` `Other_Contacts` and `All_Contacts` (everyone).

Inside a contact loop	What it gives you
`{Name} {Title} {Company}`	As entered
`{Phone} {Phones}`	First phone / all phones
`{Email} {Emails}`	First email / all emails
`{Role}`	The role label ("Seller Attorney")
`{Line}`	The file-card line for that person

```
{#Seller_Attorneys}
{Name}, {Company} — {Phone} — {Email}
{/Seller_Attorneys}
```

7. Custom fields

Settings → Merge Fields lets you add your own (text, currency, number, date, checkbox). Each shows up on the order's Documents tab and is used as `{YourFieldKey}`. A field can **auto-fill from** another field, or have a **default value**. Any custom text field can also be used with **Block** (section 4). Checkboxes print Yes or No.

8. Signing groups and signature pages

Everyone who signs together is a **signing group** (set on the Signing tab). A married couple on one order is one group by default; an entity's officers are one group; everyone else is a group of their own. Each group has its own state, county, date, time and location, so a split signing comes out right.

A signature page uses a **loop**, once for the Seller side and/or once for the Buyer side. Type this once; it repeats for each signing group, one page each, with a page break between groups (never after the last):

```
{#Seller_Groups}
Signing on {Date} at {Time}, in {Location}, {County} County, {State}

{SignatureBlock}

{NotaryClauseAcknowledgment}
{@$pageBreakExceptLast}
{/Seller_Groups}
```

For the buyer or borrower use `{#Buyer_Groups}` ... `{/Buyer_Groups}` the same way. A template with neither loop is a plain single document. Each tag (including `{#...}`, `{/...}` and `{@$pageBreakExceptLast}`) goes on its own paragraph. A Buyer and Seller can never share a signing group.

Tags inside a {#Seller_Groups} / {#Buyer_Groups} loop

Tag	What it gives you
`{Label}`	The group's name ("Signing Group 1")
`{Names}`	Plain comma-separated list of who signs: names only, no titles or entity wording
`{SignatureBlock}`	The signature lines for everyone in the group (layout below)
`{NotaryClauseAcknowledgment}`	That state's acknowledgment wording, filled in for this group
`{NotaryClauseJurat}`	That state's jurat wording. Use this *instead of* the acknowledgment for a jurat-only document; which one you type decides which prints.
`{Date}` `{SigningDate}`	This group's signing date (both mean the same thing inside the loop)
`{Time}` `{Location}`	This group's signing time and location
`{County}` `{State}`	This group's county and state

How {SignatureBlock} is laid out

Individuals each get a line and their name. **An entity** gets its full legal name, then a "By:" line for each authorized signer, with the signer's name and title under it. A couple is two individuals. Blocks are separated by a blank line.

```
Individuals:                          An entity with two signers:

_____________________________         ABC Company, LLC
John Smith
                                      By: _____________________________
_____________________________              Aaron L. Phillips, President
Mary Smith
                                      By: _____________________________
                                           Pat Lee, Secretary
```

If a group mixes individuals and an entity, the individuals come first and the entity block follows. Two different entities should be in separate groups.

9. Notary clauses

Settings → Notary Clauses holds one Acknowledgment and one Jurat per state. A group uses the clause for its own State. The clause wording can contain these placeholders:

Placeholder	Filled in with
`{SignerNames}`	Built from the group: individuals, entities, or a mix, with the "individually, and" wording when mixed
`{County} {State}`	The group's county and state
`{Day}`	Day with ordinal: "25th"
`{MonthYear}`	"September, 2026"
`{Date}`	"September 25, 2026"

{Day}, {MonthYear} and {Date} come from the group's signing date and are blank (or a handwriting blank) if none is set. Any literal blank you typed in the clause (a commission-expiration line, say) is left exactly as typed. If a group has no state, or its state has no clause, the page says so instead of staying silent.

10. The Field Reference list

To see every field and what it holds for the order that is open, generate the **Field Reference** sample template. It uses a loop:

```
{#Fields}
{Key}   {FieldLabel}   {Value}   {Kind}
{/Fields}
```

{Key} is what you type in braces, {FieldLabel} its friendly name, {Value} what it holds now, {Kind} is Built-in, Contacts or Custom.

11. Email templates NEW

Settings → Email Templates holds ready-made emails (a subject and a message). In **New Email**, pick one under Template and it is filled in from the open order; you can edit the subject and message before opening your email app.

- Use the **same tags as documents**: `{OrderNo}` `{SellerName}` `{BuyerName}` `{PropertyAddress}` `{ClosingDate}` `{SellerAttorney}` your custom fields, and so on. **Block** works too (`{SellerAddressBlock}`).
- Two extra tags for emails only: `{MyName}` (your name from Settings → Your Name) and `{DefaultSubject}` (the automatic subject line, such as `Cash to Close / {DefaultSubject}`; `{AutoSubject}` works too).
- Loops (`{#...}`) and the signing tags are not used in emails. A blank field comes out empty, not as a handwriting blank.
- A tag File Hub does not recognize is left as typed and listed above the message so you can catch a typo.
- The message goes into the email through a link, so very long messages can be cut off by some mail apps. **Copy message** is the fallback.

12. Troubleshooting

- **A tag did not fill in.** Word sometimes splits a tag across invisible pieces if spell-check interrupts you. Delete the tag and retype it in one go (or select it and toggle bold on and off once).
- **The whole document fails ("Multi error").** A stray `{` or `}` anywhere in the template, including in your own notes or examples, counts as a broken tag. Reword it without braces.
- **A signature section is blank.** The order has no signing parties on that side yet. Generate Documents tells you when this happens.
- **An address prints on one line.** You used `{SellerAddress}`; use `{SellerAddressBlock}`.
- **An address breaks in the wrong place.** Every comma is a break except the one before a state. Use a semicolon to separate two addresses, and keep the state as a two-letter abbreviation or a full name followed by a ZIP.
- **First use each session.** The merge library loads from the internet when the page opens, so wait a few seconds before the first Generate.