

# Merge Codes in the Additional Documents Library

## By Data Type

- a. **Voluntary Petition Information**, which includes all debtor information listed on the Voluntary Petition, Attorney Compensation Statement, Application to pay filing fee in installments, and information from the Client Notes section for the open client file, as well as some of the information from Schedule I and the Chapter 13 Plan Calculator.
- b. **Pick ONE Creditor** - complete with Voluntary Petition Information, which contains the name and address of any creditor you select plus debtor information contained in the Voluntary Petition data type above.
- c. **Pick MULTIPLE Creditors, Contracts or Codebtors, complete w/Voluntary Petition Information** Same field codes as the Pick ONE Creditor data type, but allows you to select more than one party from Schedule D, E, F, G or H and creates a separate letter or form for each party. It also allows you to choose any of your additional notice parties.
- d. **ALL Creditors and others on Master Mailing Matrix** - Name/ address /acct. no only, which contains the names and addresses of all creditors in the case, along with any additional notice parties, WITHOUT debtor information.
- e. **ALL Creditors and others on Master Mailing Matrix Complete with Voluntary Petition Information**, which gives you the names and address of all creditors and additional notice parties, along with debtor information in the Voluntary Petition data type above.
- f. **Client List Information** For all of your clients, this data type gives you information from the Client Notes section of the program and some information from the Attorney Compensation Statement and the Chapter 13 Plan Calculator.

**Voluntary Petition Information data type:** Contains all fields used to merge the Voluntary Petition, Attorney Compensation Statement and Form 3. Application to Pay Filing Fee in Installments, as well as some of the information from Schedule I and the Chapter 13 Plan Calculator.

(Note: In WordPerfect, colons will appear in the names of most merge fields after the first three letters.)

DbtJurisdiction	Name of jurisdiction
DbtFileNumber	Office File Number
DbtBusinessName	Name of business for business debtor
DbtFirstName	Debtor's first name
DbtMiddleName	Debtor's middle name
DbtLastName	Debtor's last name
DbtOtherNames	Other names of debtor
DbtIndexAs	Client's name as it appears in the Client List Window
DbtTypeOfDebtor	Coded: 1 = Individual, 2 = Joint (Husband & Wife), 3 = Partnership, 4 = Corporation Publicly Held, 5 = Corporation Not Publicly Held, 6 = Municipality, 7 = Other
DbtTypeOther	If debtor is "other" the text answer you typed in for the type of debtor
DbtNatureOfDebt	Coded: 1 = Non-Business/Consumer, 2 = Business
DbtVenue	Coded: 1 = Residence, 2 = Related case
DbtChapter	Coded: 1 = Chapter 7, 2 = Chapter 9, 3 = Chapter 11, 4 = Chapter 12, 5 = Chapter 13, 6 = Sec. 304 - Case Ancillary to Foreign Proceeding contains the chapter in plain text: 7, 11, 12, 13
DbtChapterOfFiling	
DbtFeeAttached	Coded: 1 = Attached, 2 = Intends to file
DbtPlanStatus	Coded 1 = Attached, 2 = Intends to file
DbtPlanDate	Date of Chapter 13 Plan, if applicable
DbtAddr	Debtor's street address
DbtCity	City of Debtor's address
DbtState	State of Debtor's address
DbtZip	Zip Code of Debtor's address
DbtCounty	County of debtor's residence
DbtMailAddr	Debtor's mailing address
DbtMailCity	City of Debtor's mailing address

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DbtMailSt	State of Debtor's mailing address
DbtMailZip	Zip Code of Debtor's mailing address
DbtPriorLocation	District where prior case filed
DbtPriorCaseNo	Case number of prior case
DbtPriorDate	Date of filing of prior case
DbtRelCaseName	Name of related case
DbtRelCaseNo	Case number of related case
DbtRelCaseDate	Date of filing of related case
DbtRelCaseRelation	Relation to debtor of related case
DbtRelCaseDistrict	District where related case was filed
DbtRelCaseJudge	Judge assigned to related case
DbtCaseNo	Case number of this filing
DbtSocSecNo	Debtor's Social Security Number
DbtAttorney1	Attorney for debtor (name only)
DbtAtty1RegNum	Attorney's state bar number (if entered)
DbtFirmName	Law firm name
DbtFirmAddress	Law Firm address
DbtFirmPhone	Law firm phone number
Dbt:FirmFax	Law firm fax number
DbtProSe	if "Debtor is not represented by an attorney" is checked on the Voluntary Petition - Filing Information screen, this field will contain the entry for debtor's phone number

#### Non-attorney preparer information

DbtNAname	Non attorney preparer's name
DbtNAaddr1	Non attorney preparer's street address
DbtNAaddr2	Non attorney's city state and zip
DbtNAass	Non attorney's Social Security Number
DbtNAphone	non-attorney phone

#### Statistical Administrative Information

DbtchkFunds	Funds available, Coded: 1=funds available, 2=no funds available
DbtchkNoCredits	Number of creditors, Coded: 1=1-15, 2=16-49, 3=50-99, 4=100-199, 5=200-999, 6=1000 or over
DbtchkAssets	Assets, Coded: 1=\$0-\$50,000, 2=\$50,001-\$100,000, 3=\$100,001-\$500,000, 4=\$500,001-\$1,000,000, 5=\$1,000,001-\$10,000,000, 6=\$10,000,001-\$50,000,000, 7=\$50,000,001-\$100,000,000, 8=more than \$100,000,000
DbtchkLiabil	Liabilities, coded: 1=\$0-\$50,000, 2=\$50,001-\$100,000, 3=\$100,001-\$500,000, 4=\$500,001-\$1,000,000, 5=\$1,000,001-\$10,000,000, 6=\$10,000,001-\$50,000,000, 7=\$50,000,001-\$100,000,000, 8=more than \$100,000,000

#### Attorney Compensation Statement

DbtCompTotal	Total compensation promised
DbtCompPaid	Total compensation paid
DbtCompDue	Total compensation due
DbtCompSource	Source of compensation
DbtCompShare	No sharing except...

#### Form 3. Application to Pay Filing Fee in Installments

DbtFeeWFiling	Amount paid with filing
DbtFeeInstall	Amount to be paid in installments
DbtInstallNo	Number of installments
DbtInstallAmt1	Installment 1 dollar amount
DbtInstallDate1	Installment 1 date
DbtInstallAmt2	Installment 2 dollar amount
DbtInstallDate2	Installment 2 date
DbtInstallAmt3	Installment 3 dollar amount
DbtInstallDate3	Installment 3 date
DbtInstallAmt4	Installment 4 dollar amount
DbtInstallDate4	Installment 4 date

#### Business Debtor Questions

DbtSmallBiz	Debtor is a small business as defined in 11 U.S.C. § 101. - 1 for yes, 0
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DbtSBElect	for no Debtor is and elects to be considered a small business under 11 U.S.C. § 1121(e). (Optional) - 1 for yes, 0 for no
BusLocationAddr	Location of business (street address)
BusLocationCity	Location of business (city)
BusLocationSt	Location of business (State)
BusLocationZip	Location of business (Zip Code)
BusSigner	Name of signer for business
BusSignerTitle	Title of signer for business
<b>Joint Debtor Information</b>	
JoiFirstName	First name of joint debtor
JoiMiddleName	Middle name of joint debtor
JoiLastName	Last name of joint debtor
JoiOtherNames	Other names of joint debtor
JoiSocSecNo	Joint Debtor's Social Security Number
JoiAddr	Joint Debtor's address
JoiCity	City of joint debtor's address
JoiSt	State of joint debtor's address
JoiZip	Zip Code of joint debtor's address
JoiCounty	County of residence of joint debtor
JoiMailAddr	Joint debtor's mailing address
JoiMailCity	Joint debtor's city of mailing address
JoiMailSt	Joint debtor's state of mailing address
JoiMailZip	Joint debtor's Zip Code of mailing address
TotalPages	Total number of pages in schedules A-J
<b>The following codes are from the Notes section of the program</b>	
StatusCode	Case Status (1= Active, 2=Closed)
StatusComment	
FollowupDate	
NeedsAttnCode	(1 - "Needs Attention", 2 - no check mark)
DOSFilename	(8 character dos file name of client file)
DateOpened	
DateFiled	
Date341	
Time341	
Location341	
DateConfirmed	
DateDischarged	
DebtorHomePhone	
DebtorWorkPhone	
JointDebtorHomePhone	
JointDebtorWorkPhone	
Paralegal	
ReferredBy	

**Codes drawn from the Chapter 13 Plan Calculator**

P13_PayEmpDebtorInterval	From the Chapter 13 Plan, Wage Deduction tab, the interval that the debtor gets paid
P13_PayEmpDebtorAmount	From the Chapter 13 Plan, Wage Deduction tab, the amount to be deducted from the debtor's paycheck
P13_PayEmpSpouseInterval	From the Chapter 13 Plan, Wage Deduction tab, the interval that the joint debtor gets paid
P13_PayEmpSpouseAmount	From the Chapter 13 Plan, Wage Deduction tab, the amount to be deducted from the joint debtor's paycheck
P13_AttorneyFee	From the Chapter 13 Plan, Claims Tab, the amount of the attorney's fee that is being paid through the 13 Plan
P13_AttorneyFeeDuration	From the Chapter 13 Plan, Claims Tab, the number of months over

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which the attorney's fee will be paid in the Chapter 13 Plan

**Codes taken from Schedule I**

DbtEmployer	From Schedule I, the name of the debtor's employer
DbtEmpAddr	From Schedule I, the address of the debtor's employer
DbtEmpHowLong	From Schedule I, the amount of time the debtor has been employed by this employer
DbtEmpNet	From Schedule I, the net amount of the debtor's take home pay (total monthly pay)
JoiEmployer	From Schedule I, the joint debtor's employer
JoiEmpAddr	From Schedule I, the joint debtor's employer's address
JoiEmpHowLong	From Schedule I, the amount of time the joint debtor has been employed by this company
JoiEmpNet	From Schedule I, the joint debtor's net pay

**Pick One Creditor + Voluntary Petition info. data type** contains all fields in voluntary petition info. (all fields above) plus:

ClanameSorted (Word) or Claname (WordPerfect)	If there is no tilde in the creditor name, NameEntered will be same as NameSorted. If there is a tilde, NameSorted will be the reversed form of the name (i.e. Last Name, First Name).
ClanameEntered (Word) or ClanameD (WordPerfect)	If there is no tilde in the creditor name, NameEntered will be same as NameSorted. If there is a tilde, NameSorted will be the reversed form of the name (i.e. Last Name, First Name).
Claddress	Creditor's street address
Clacity	City of Creditor's address
Clastate	State of Creditor's address
Clazip	Zip Code of Creditor's address
ClaccountNo	Account number of debtor's account with creditor
CladateIncurred	Date debt incurred
ClalienNature	Nature of lien (Schedule D entries only)
Claconsideration	Consideration (Schedules D, E, F: Description of property for Sched. D, Consideration for Schedules E and F)
Clacodebtor	'X' if there is a codebtor, blank if not
Clahwjc	H, W, J, C (who is responsible for debt, husband, wife, joint or community)
Clacontingent	'X' if checked and blank if not checked.
Clanunliquidated	'X' if checked and blank if not checked.
Cladisputed	'X' if checked and blank if not checked.
Clasetoff	'X' if checked and blank if not checked.
ClacclaimAmt	Amount of claim
ClapriorityAmt	Amount entitled to priority (Schedule E only)
Clatform4Amt	Unsecured amount of claim (for use on Form 4)
ClapropertyValue	Market value of property

**Pick MULTIPLE Creditors, Contracts or Codebtors, complete w/Voluntary Petition Information** Same field codes as the Pick ONE Creditor data type above, but allows you to select more than one party from Schedule D, E, F, G or H and creates a separate letter or form for each party. It also allows you to choose any of your additional notice parties.

**All Creditors - Name/Address/Account No. Only data type** Contains the Name and Address of all parties included on the Creditor Address Matrix (Master Mailing List) and account number (if any). The entire address is contained in one field. Line breaks are represented by an ASCII character 11 (Ctrl-K) which both Word and WordPerfect interpret as a "soft line break".

Address	Name and address of creditor
AccountNo	Account number

**All Creditors - Complete w/ Voluntary Petition Info.** Contains the same fields as Pick ONE Creditor - Complete w/Voluntary Petition Information, but includes all parties included on the creditor

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address matrix (master mailing list).

### **Client List Information - this merges the following fields for ALL CLIENTS**

IndexAs	Client's name as it appears in the Client List Window
FileNumber	Office file number entered in the Notes screen
DOSFileName	The 8 character file name of this client
Chapter	Chapter of Filing
TypeOfDebtor	Entity (Joint, Individual, Corporation, etc.)
DateCreated	The date the file was created in Best Case® in MM/DD/YY format
DateModified	The date of the last change to the file in MM/DD/YY format
DateOpened	From the Notes screen, the date the case was opened in MM/DD/YY format
DateFiled	From the Notes screen, the date the case was filed in MM/DD/YY format
Date341	From the Notes screen, the date of the 341 meeting, in MM/DD/YY format
Time341	From the Notes screen, the time of the 341 meeting
Location341	From the Notes screen, the location of the 341 meeting
DateConfirmed	From the Notes screen, the date that the case was confirmed, in MM/DD/YY format
DateDischarged	From the Notes screen, the date that the case was discharged, in MM/DD/YY format
DbtSSN	The debtor's social security number
DbtHomePhone	From the Notes screen, the debtor's home telephone number
DbtWorkPhone	From the Notes screen, the debtor's work telephone number
JoiSSN	The joint debtor's social security number
JoiHomePhone	From the Notes screen, the joint debtor's home phone number
JoiWorkPhone	From the Notes screen, the joint debtor's work phone number
Attorney	The attorney representing the debtor
Paralegal	From the Notes screen, the paralegal working on the case
ReferredBy	From the Notes screen, the person who referred the case to your firm
Status	From the Notes screen, the status of the case: either Active or Closed
StatusComment	From the Notes screen, the comments about the case
FollowupDate	From the Notes screen, the follow up date in MM/DD/YY format
NeedsAttn	From the Notes screen, 1=Yes, 0=No
JurisdictionCode	The file name of the jurisdiction associated with the case
DbtFirstName	From the Voluntary Petition, the debtor's first name
DbtMiddleName	From the Voluntary Petition, the debtor's middle name
DbtLastName	From the Voluntary Petition, the debtor's last name
DbtOtherNames	From the Voluntary Petition, all other names that the debtor has used
DbtAddr	From the Voluntary Petition, the debtor's street address
DbtCity	From the Voluntary Petition, the debtor's city of residence
DbtState	From the Voluntary Petition, the debtor's state of residence
DbtZip	From the Voluntary Petition, the debtor's zip code
DbtCounty	From the Voluntary Petition, the debtor's county of residence
DbtMailAddr	From the Voluntary Petition, the street address of the debtor's mailing address
DbtMailCity	From the Voluntary Petition, the city of the debtor's mailing address
DbtMailSt	From the Voluntary Petition, the state of the debtor's mailing address
DbtMailZip	From the Voluntary Petition, the zip code of the debtor's mailing address
DbtCaseNo	From the Voluntary Petition, the case number
CompTotal	From the Attorney Compensation Statement, the total compensation that the attorney will receive
CompPaid	From the Attorney Compensation Statement, the amount of the compensation that has been promised
CompDue	From the Attorney Compensation Statement, the amount of compensation still due
P13_PayEmpDebtorInterval	From the Chapter 13 Plan, Wage Deduction tab, the interval that the debtor gets paid
P13_PayEmpDebtorAmount	From the Chapter 13 Plan, Wage Deduction tab, the amount to be

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P13_PayEmpSpouseInterval	deducted from the debtor's paycheck From the Chapter 13 Plan, Wage Deduction tab, the interval that the joint debtor gets paid
P13_PayEmpSpouseAmount	From the Chapter 13 Plan, Wage Deduction tab, the amount to be deducted from the joint debtor's paycheck
P13_AttorneyFee	From the Chapter 13 Plan, Claims Tab, the amount of the attorney's fee that is being paid through the 13 Plan
P13_AttorneyFeeDuration	From the Chapter 13 Plan, Claims Tab, the number of months over which the attorney's fee will be paid in the Chapter 13 Plan
JoiFirstName	From the Voluntary Petition, the joint debtor's first name
JoiMiddleName	From the Voluntary Petition, the joint debtor's middle name
JoiLastName	From the Voluntary Petition, the joint debtor's last name
JoiOtherNames	From the Voluntary Petition, all other names of the joint debtor
JoiSocSecNo	From the Voluntary Petition, the joint debtor's social security number
JoiAddr	From the Voluntary Petition, the joint debtor's street address
JoiCity	From the Voluntary Petition, the joint debtor's city of residence
JoiState	From the Voluntary Petition, the joint debtor's state of residence
JoiZip	From the Voluntary Petition, the joint debtor's zip code
JoiCounty	From the Voluntary Petition, the joint debtor's county of residence
JoiMailAddr	From the Voluntary Petition, the street address of the joint debtor's mailing address
JoiMailCity	From the Voluntary Petition, the joint debtor's city of residence
JoiMailSt	From the Voluntary Petition, the joint debtor's state of residence
JoiMailZip	From the Voluntary Petition, the joint debtor's zip code
BusinessName	From the Voluntary Petition, the name of the business if it is a business debtor
BusLocationAddr	From the Voluntary Petition, business debtor's street address
BusLocationCity	From the Voluntary Petition, business debtor's city
BusLocationSt	From the Voluntary Petition, business debtor's state
BusLocationZip	From the Voluntary Petition, business debtor's zip code
BusSignerName	From the Voluntary Petition, business debtor's name of authorized signer
BusSignerTitle	From the Voluntary Petition, business debtor's title of authorized signer
DbtEmployer	From Schedule I, the name of the debtor's employer
DbtEmpAddr	From Schedule I, the address of the debtor's employer
DbtEmpHowLong	From Schedule I, the amount of time the debtor has been employed by this employer
DbtEmpNet	From Schedule I, the net amount of the debtor's take home pay (total monthly pay)
JoiEmployer	From Schedule I, the joint debtor's employer
JoiEmpAddr	From Schedule I, the joint debtor's employer's address
JoiEmpHowLong	From Schedule I, the amount of time the joint debtor has been employed by this company
JoiEmpNet	From Schedule I, the joint debtor's net pay

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