Word Data File

Last Modified on 28/07/2025 11:43 am AEST

This article covers the *Word Data Files* menu, which is designed to export some of the data from some areas of StrataMax that may be useful to use in conjunction with other applications, such as Word or Excel.

Two files are created by StrataMax in the document directory for the building being used (e.g. network drive:\BCM\1234\DOCS).

- The .WRD file contains the data to be merged.
- The .REF file contains the folder/network path and file name of the file to be merged together with its field name reference for use in a Word document. It also contains instructions on how to create a merged document. Some word processing programs that have a merge facility use a separate file to contain the list of the field names. This file is to be used for those programs.

This area will offer the files as instructed below, and note that this does not support split contacts. Please use *Merge Letters*.

Create Word Data File

- 1. Open the Word Data Files menu.
- 2. Under the *Data Type* section, select the radio button for the type of account to create data for. This will determine which list of codes will be exported to the data file:
 - Owners
 - Creditors
 - General Ledger
 - All Accounts

Select Fields	Load File
ata Type	New File
Owners Home Address Creditors	Delete File
) General Ledger) All Accounts	Set Limits
Office Bearers (All) Archive	Make Data File
Include Non-Owner Officers	Field Names List
electable Codes Insurance 901	

3. Click New File, and in the New File window, type in an 8-letter name for the file, then clickOK.

Select Fields	Load File
Data Type	New File
Owners Home Address Creditors	Delete File
General Ledger All Accounts	Set Limits
Office Bearers (All) Archive	Make Data File
Include Non-Owner Officers Exclude Zero Lot Entitlements	Field Names List
electable Codes Insurance 901	
Contracts Code	

4. Tag which fields to export in the word data file, and clickOK.

		Tag Fields to Export		01
Tag	Field No	Name	*	UK
0	1	Building Name & Number		Cance
	2	Account No	E	
	3	Description		
	10	Month to Date Bal		
	11	Year to Date Bal.		
	12	Committed Balance		
	13	Last Year Balance		
	14	Previous Year Bal.		
	29	Current		
	30	30 Days		
	31	60 Days		
	32	90 Days		
	33	90+ Days		
0	34	Residential Address (1)		
Ø	35	Residential Address (2)		
2	36	Residential Address (3)		
	37	Notice Address (1)		
	38	Notice Address (2)		
	39	Notice Address (3)		
	42	First Mortgagee's Address (4)		
	43	Permanent Proxy	-	

- 5. The *File Loaded* section will now display the file name. To select the field codes for this export again, click on *Field Names List*, tag the ones required, then click *OK*.
 - This will remove the previous tagged codes, so they will need to be tagged again.
 - When data is exported from StrataMax to a word processing file, it is delimited by the commas or tabs specified by the user. This simply means that any fields on one line of the export file are separated by commas or tab characters.
- 6. In the *Delimiter* section, click either the *Tab* or the *Comma* radio button as required.

It is recommended to use *Tab* because the use *Comma* as a delimiter will cause the second half of that field to be treated as a separate item if there is a comma in an information field. This will cause problems with the merge or import in the other application.

Selectricus	
ata Type	New File
Owners Home Address Creditors	Delete File
General Ledger All Accounts	Set Limits
Office Bearers (All) Archive	Make Data File
Include Non-Owner Officers Exclude Zero Lot Entitlements	Field Names List
electable Codes Insurance 901	

7. Click the Set Limits button to set any required limits for the word data file e.g. to select which

creditors to export for. A start and finish limit can be set to include all records fitting that criteria. If it is a tag list (e.g. 'select code').

- Tag any or all of the codes to be included. If none are tagged then all applicants will be included.
- Click on a code limit.
- Click 'Edit or just double-click on a code limit.
- Type in the limit criteria.
- Click on another limit.

Limits for Word Data	i Files				Load File
Help				ielde	
	Set Limits as required				New File
Limit Name	Limit Data	^	Edit	7	
Select Code					Delete File
TD Balance Start			OK		
TD Balance Finish		-			Set Limits
0 Days Start			Cancel		
80 Days Finish					Make Data File
60 Days Start					
60 Days Finish					Field Names List
0 Days Start		*		- /	
1 of 11				-/	

- 8. Click *OK* when you have finished setting the limits.
- 9. Click Make Data.
 - When the file has been created (it will be very quick), the .ref file or view the .word file can be viewed to check that the correct information was selected. The data is ready to merge with a word processor or other application.

File Loaded		
AGM2014	Select Fields	Load File
ata Type		New File
Owners Creditors	Home Address -	Delete File
General Ledg All Accounts	ger	Set Limits
Office Beare Archive	s (All)	Make Data File
Include Non	Owner Officers Lot Entitlements	Field Names List
electable Codes Insurance	901	
Contracts Co	ode	
Televiter		

You can open *Word Data Files* from the *Certificate Applicants* menu to retrieve information from the Certificate Applicants.

Re-Export Word Data File

- 1. Search or select Word Data File.
- 2. Click Load File.
 - If may get the message: 'Data type for this file is not valid! Unable to continue', click 'OK' then select a different 'Data Type'. The file will still be opened, you can view the old files as they are created, or you can select new fields.
- 3. Click on the file name to use.

MaxSoft		
	Load File	
AGM2014.F		
1 ol	1	
	Corres]	
	UK Carice	

- 4. Click OK.
 - The 'File Loaded' section will now display the file name you typed. If you wish to re-select the field codes for this export, tag the ones you want then click *OK*. This will, however, remove the tags from the codes you selected previously so you will have to tag all of the codes you want again.
 - When data is exported from StrataMax to a word processing file, it is delimited by the commas or tabs specified by the user. This simply means that any fields on one line of the export file are separated by commas or tab characters.
- 5. In the *Delimiter* section, click either the *Tab* or the *Comma* radio button as required.

It is recommended to use *Tab* because the use *Comma* as a delimiter will cause the second half of that field to be treated as a separate item if there is a comma in an information field. This will cause problems with the merge or import in the other application.

- Click the Set Limits button to set any required limits for the word data file e.g. to select which creditors to export for. A start and finish limit can be set to include all records fitting that criteria. If it is a tag list (e.g. 'select code').
 - Tag any or all of the codes to be included. If none are tagged then all applicants will be included.
 - Click on a code limit.
 - Click 'Edit or just double-click on a code limit.
 - Type in the limit criteria.
 - Click on another limit.
- 7. Click OK when you have finished setting the limits.
- 8. Click Make Data.

Delete Word Data File

- 1. Search or select Word Data File.
- 2. Click Delete File.



3. Click on the file name to delete.

		Dala	to File	
-		Dele	(e File	
AGM20	14.REF			
AGM20	14.WRD			
		_		
2	of 2			
2	of 2			

4. Click OK.

View File(s)

The .ref file contains a list of the field names that correspond to columns of data in the .wrd file by this same name. This file is required for any mail merge procedure by MS word version 2.0 and optional for all other versions of MS Word. This file is used in conjunction with the .wrd file for running any mail merge procedure in Word Processing, spreadsheet, desktop publishing or other external programs. Your other external program will also contain their own instructions for merge procedures.

File	ioto Help	
File Lo	View Ref. File	Lude
AGM:	View Data File	Load File
Data	Change Data Viewer	New File
O Own	ers Home Address -	
Cred	litors	Delete File
O All A	ccounts e Bearers (All) ive	Set Limits Make Data File
E Inclu	ude Non-Owner Officers ude Zero Lot Entitlements	Field Names List
Selectab Inst	le Codes irance 901	
Con	tracts Code	
Delimiter	🖲 Tab 💿 Comma	Close

AGM2014.REF - Notepad	
File Edit Format View Help	
WORDFLD.DEB Datafile: \fSINT\QDrive\v51\BCM\DOCS\77889\AGM2014.WRD Number of fields: 5 FieldNames: 1 BuildingName&Num 34 ResidentialAddress1 35 ResidentialAddress2 36 ResidentialAddress3 130 E-MailAddress Address Priority:Home Address	*
BuildingName&Num ResidentialAddress1 ResidentialAddress2 ResidentialAddress3 E-MailAddress	
 This is the reference file for merging data from BCMax into a word document. The fields that have been selected for the merge data are listed above. To create a document including the merge data follow these steps:- 1. Create a base document in the form you require leaving room for the fields you wish to include. 2. Make the document a print merge document by selecting Print Merge from the file menu. 3. Attach the data file to the document so that word can find the data. Do this by pressing the Attach Data File button. 4. Specify the data file to be \\FSINT\OPTIVE\VSI\BCM\DOCS\77889\AGM2014.WRD. 5. Work out where the fields should be placed and insert the merge fields button on just under the menu bar on the left hand side. 6. Perform the actual merging by pressing the either of the merge buttons under the menu bar next to the tick button. The first merge button creates a new document for the merged information and the other directly prints the merged information. 	~
). (

The .wrd file contains the columns of data that correspond to a list of the field names in the .ref file by this same name. This file is used in conjunction with the .ref file for running any mail merge procedure in Word Processing, spreadsheet, desktop publishing or other external programs. Your other external program will also contain their own instructions for merge procedures.

ile	Goto Help	
File Lo	View Ref. File	
AGM:	View Data File	Load File
Data	Change Data Viewer	New File
• 0w	ners Home Address -	
Cree	ditors	Delete File
 Ger All A Official 	ieral Ledger Accounts ce Bearers (All)	Set Limits
O Arci	hive	Make Data File
E Exc	ude Non-Owner Officers Iude Zero Lot Entitlements	Field Names List
Selectat Ins	vie Codes urance 901	
Cor	ntracts Code	
Delimite	1	
	Tab O Comma	Chur

AGM2014.WRD - Notepad	×	
File Edit Format View Help		
BuildingName&Num ResidentialAddress1 ResidentialAddress2 ResidentialAddress3 E-MailAddress TRAINING MANUALS B.F.P. 77889 U 1/15 varsity Pde Varsity Lakes QLD 4227 training@stratamax.com.au TRAINING MANUALS B.F.P. 77889 175 Varsity Pde Varsity Qld 4711 Email Address for Levies maxsoft@stratamax. TRAINING MANUALS B.F.P. 77889 28 Varsity Pde Vasity Qld 4227 training@stratamax.com TRAINING MANUALS B.F.P. 77889 28 Varsity Pde Vasity Qld 4227 training@stratamax.com TRAINING MANUALS B.F.P. 77889 1/15 Varsity Pde Vasity Qld 4211 training@stratamax.com TRAINING MANUALS B.F.P. 77889 1/15 Varsity Pde Varsity Qld 4711 training@stratamax.com TRAINING MANUALS B.F.P. 77889 1/15 Varsity Pde Varsity Qld 4711 Email Address for Levies maxsoft@stratamax.	. c	L
	-	٣
 	۴.,	