

SyncWarrior

User Guide

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Introduction and Overview

Description

SyncWarrior copies text and images from Microsoft Excel workbooks into Microsoft Word documents. You use SyncWarrior to create links between your source Excel workbooks and your target Word document. Updating your document with the current information from your linked workbooks then becomes as simple as clicking a button.

SyncWarrior also allows you to turn content in your documents on and off based on values in your workbooks. If a linked workbook cell returns TRUE, then the defined block of content will appear in the report. If the linked cell returns FALSE, then the content will not appear.

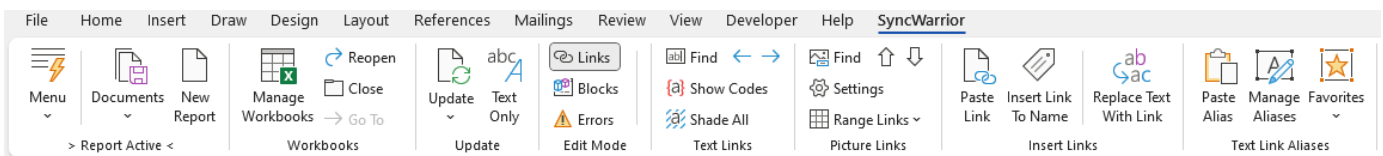
Microsoft Office Add-Ins

SyncWarrior consists of two Microsoft Office COM add-ins, one for Word (SyncWarrior Word), and one for Excel (SyncWarrior Excel). Since the heavy lifting is done on the Word side, SyncWarrior Word is the larger of the two add-ins. SyncWarrior Excel tells SyncWarrior Word where content appears in Excel workbooks, and SyncWarrior Word uses that information to create links and to update the linked content in Word documents.

Ribbon Tabs

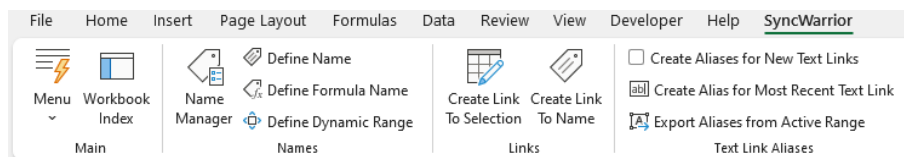
You access each add-in's features from its tab in the Office application's ribbon. When you're logged in and editing a document, the SyncWarrior Word ribbon tab typically looks something like this:

SyncWarrior Word Ribbon Tab



The SyncWarrior Excel ribbon tab looks like this:

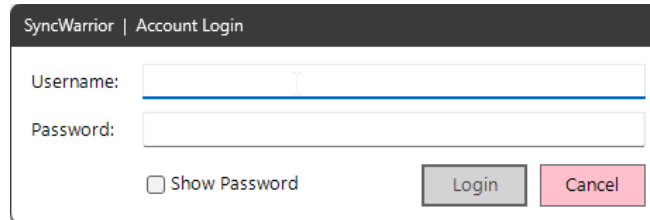
SyncWarrior Excel Ribbon Tab



Login and Application Mode

You login into SyncWarrior from Word. When you're not logged into a SyncWarrior account, instead of the SyncWarrior Word ribbon tab, you will see the SyncWarrior Login ribbon tab, which only contains the Login button. When you click the Login button, SyncWarrior Word opens a standard form for entering a username and password:

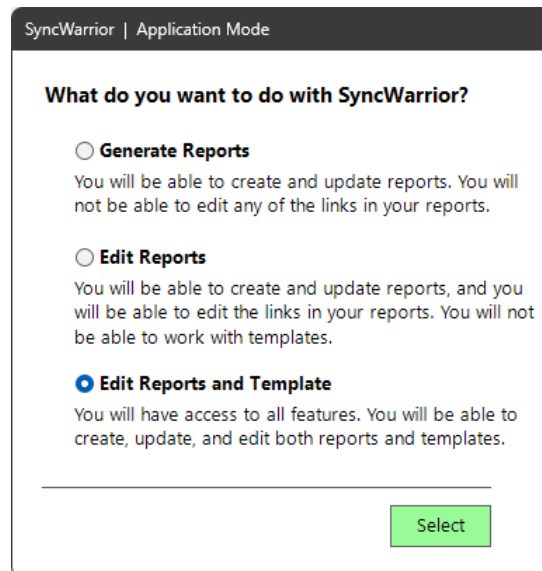
Account Login Form



The screenshot shows a window titled "SyncWarrior | Account Login". It contains two input fields: "Username:" and "Password:". Below the "Password:" field is a checkbox labeled "Show Password". At the bottom right, there are two buttons: "Login" (grey) and "Cancel" (pink).

When you're done logging in, SyncWarrior presents a form for selecting the Application Mode:

Application Mode Form



The screenshot shows a window titled "SyncWarrior | Application Mode". The main heading is "What do you want to do with SyncWarrior?". There are three radio button options:

- Generate Reports**
You will be able to create and update reports. You will not be able to edit any of the links in your reports.
- Edit Reports**
You will be able to create and update reports, and you will be able to edit the links in your reports. You will not be able to work with templates.
- Edit Reports and Template**
You will have access to all features. You will be able to create, update, and edit both reports and templates.

At the bottom right, there is a green "Select" button.

This form is intended to be used by a senior individual or an IT administrator to limit what a junior individual can do. In those cases, the senior individual or IT administrator will have to log in for the junior individual and select the Application Mode.

Document Types

SyncWarrior Word separates documents into two types:

- A **template** contains content that is reused to create multiple versions of a report. Templates simplify and accelerate the creation of reports that are generated repetitively.
- A **report** is your end product, a document that you will deliver to an intended audience. While you can use a template to create a report, you don't have to. You can create a new report document from scratch, or you can use SyncWarrior to edit an existing document.

Please Note: A SyncWarrior template is not a Word template and vice versa. SyncWarrior templates are entirely separate and independent from Microsoft Word templates.

Commands

A **command** is Word content that tells SyncWarrior Word where to find Excel content. There are three types of commands:

- A **text link** returns text from a cell or merged cells.
- A **picture link** returns an image of a range or a chart.
- A **toggle block** defines a section of a template that can be turned on and off in the reports created from the template.

Text Links

A text link returns text from either a single cell or merged cells. SyncWarrior Word stores the text in your document using a Word document variable and displays the text in the document body using one or more Word DOCVARIABLE fields.

Picture Links

A picture link returns an image of a worksheet range, a chart sheet, or a chart object. The image can be either an inline or floating shape. Inline shapes retain their size when the command updates, and floating shapes retain their size and position.

Toggle Blocks

A toggle block defines two things:

- A block of content within a template.
- A link to a Boolean value in an Excel workbook.

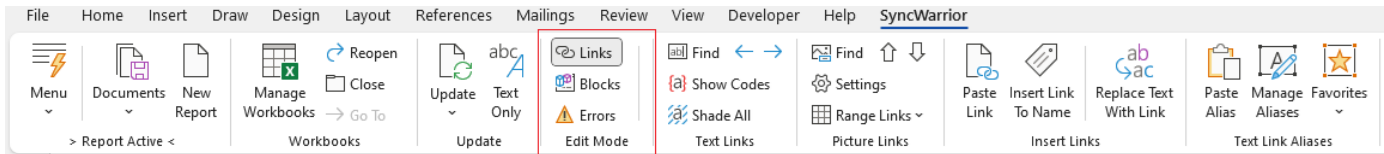
When SyncWarrior Word generates a report from a template that contains a toggle block, it evaluates the block's Excel link. If the link returns TRUE, SyncWarrior Word includes the block of content in the report. If the link returns FALSE, SyncWarrior Word deletes the block of content.

Edit Mode

You use the Edit Mode in SyncWarrior Word's ribbon tab to select the tasks you want to complete:

- ➔ To create and edit Links, click the Links button.
- ➔ To create and edit Toggle Blocks, click the Blocks button.
- ➔ To resolve Errors, click the Errors button.

Edit Mode Ribbon Group (SyncWarrior Word)



Documents

Reports and Templates

Please Note: A SyncWarrior template is not a Word template and vice versa. SyncWarrior templates are entirely separate and independent from Microsoft Word templates.

As was mentioned [above](#), SyncWarrior Word separates documents into two types:

- A **template** contains content that is reused to create multiple versions of a report. Templates simplify and accelerate the creation of reports that are generated repetitively.
- A **report** is your end product, a document that you will deliver to an intended audience. While you can use a template to create a report, you don't have to. You can create a new report document from scratch, or you can use SyncWarrior to edit an existing document.

In more practical and concise terms, the difference between reports and templates comes down to this:

- You use a template to create multiple standardized copies of a report.
- A report is any document that is not a template.

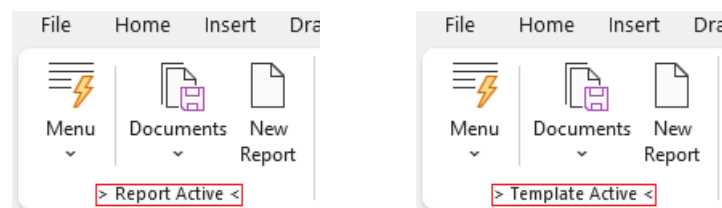
What makes a Document a Template (and not a Report)?

SyncWarrior Word determines which documents are (and are not) templates by the file location. If the document's file is in one of SyncWarrior's Templates Folders, then the document is a template. If the file is located elsewhere, or if the document hasn't been saved (and therefore doesn't have a file), then the document is a report.

Is the Active Document a Report or a Template?

Reports and templates are both standard Word documents and look the same. Since there aren't any visual differences between the two, we use the label for the first group on SyncWarrior Word's ribbon tab to indicate which type of document is currently active and being edited:

Active Document Type Indicator

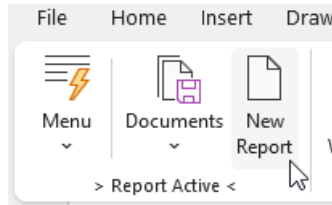


Create a Report

Please Note: You don't have to create a report to use SyncWarrior. You can use SyncWarrior with any Word document. The advantage to creating a report is that you can apply a [template](#).

To create a new report, start by clicking SyncWarrior Word's New Report button. SyncWarrior Word will open the New Report Wizard.

New Report Button (SyncWarrior Word)



New Report Wizard: Step 1

A screenshot of the "New Report Wizard: Step 1" dialog box. The title bar reads "SyncWarrior | New Report". The main heading is "Step 1: Select Report Template". Below this, there is a "Folder" field containing the path "C:\ProgramData\ValuSource\SyncWarrior\Templates\". To the right of the folder field are three buttons: "Standard", "Custom", and "Select". Below the folder field is a list of report templates: "<Empty Report (No Template)>", "Analysis Report.docx", and "Engagement Letter.docx". The "<Empty Report (No Template)>" option is selected and highlighted in blue. At the bottom of the dialog box, there are three buttons: "Back", "Next", and "Cancel".

Please Note: For the purposes of creating a new report, you can temporarily "deputize" any document on your system as a template. The document file remains in place and is not modified in any way. See Create a Report from a Document below.

Create an Empty Report

To create an empty report, select "<Empty Report (No Template)>" from the documents list, then click the Next button, at the bottom of the form. See Step 2: Select Linked Workbooks.

Create a Report from a Template

To create a report from a standard or custom template (see Templates Folders), start by clicking the Standard or Custom button in the Folder group box. SyncWarrior Word will refresh the documents

list to show the contents of the selected templates folder. Select the template that you want to use from the document list, then click the Next button, at the bottom of the form. See Step 2: Select Linked Workbooks.

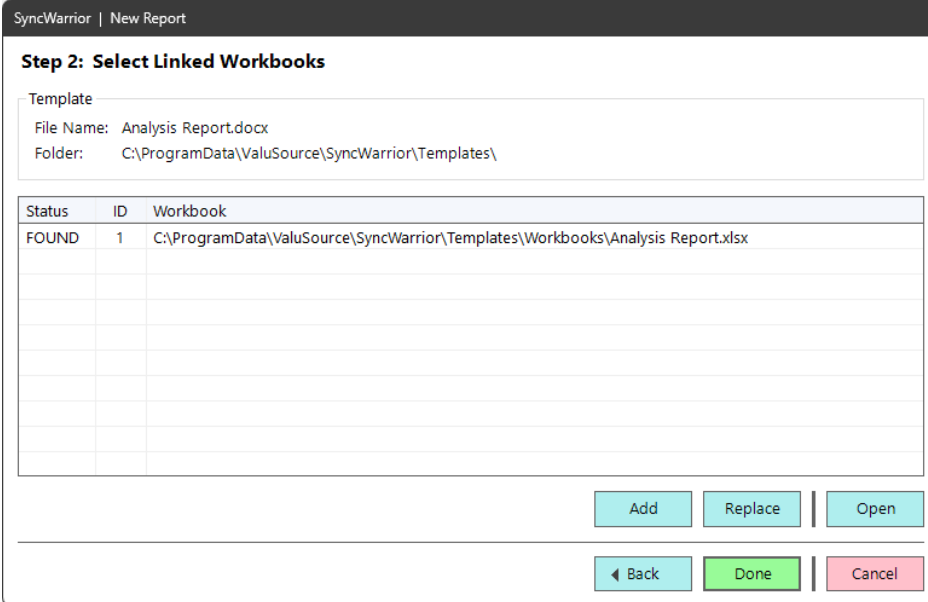
Create a Report from a Document

Click the Select button in the Folder group box, then select the folder where the document file is located. SyncWarrior Word will refresh the documents list with the contents of the selected folder. Select the file that you want to use from the documents list, then click the Next button, at the bottom of the form. SyncWarrior Word will open Step 2 in the New Report Wizard, where you can select the workbooks that are linked to your new report. See Step 2: Select Linked Workbooks.

Step 2: Select Linked Workbooks

In Step 2 of the New Report Wizard, you select the workbooks linked to your new report. You can add workbooks, replace workbooks, and open workbooks. You cannot remove workbooks because that would break any linked content.

New Report Wizard: Step 2



The screenshot shows a dialog box titled "SyncWarrior | New Report" with the subtitle "Step 2: Select Linked Workbooks". It contains a "Template" section with the following details:

- File Name: Analysis Report.docx
- Folder: C:\ProgramData\ValuSource\SyncWarrior\Templates\

Below the template information is a table with the following columns: Status, ID, and Workbook.

Status	ID	Workbook
FOUND	1	C:\ProgramData\ValuSource\SyncWarrior\Templates\Workbooks\Analysis Report.xlsx

At the bottom of the dialog, there are two rows of buttons. The first row contains "Add", "Replace", and "Open" buttons. The second row contains "Back", "Done", and "Cancel" buttons.

Edit the Linked Workbooks

You may want to edit your linked workbooks before you generate your report, so that your changes are applied when the report is created. Use the Open button, just below the workbooks list, to open the workbooks that you want to edit.

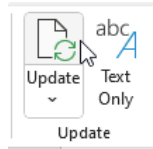
Generate Your Report

When you have finished linking and editing workbooks, click the Done button, at the bottom of the form. SyncWarrior Word will close the New Report Wizard. Your new report will become the active document.

Update a Document

Updating a document retrieves the current data from the linked workbooks. You can save time by updating only the text links, and you can choose to ignore [locked links](#). You update a document from SyncWarrior Word's Update Ribbon Group.

Update Ribbon Group and Button (SyncWarrior Word)



Update

The Update button updates all of the unlocked text links and picture links. If you are editing a report that contains toggle blocks (which can occur if there was an error when the report was generated), SyncWarrior Word will re-attempt to apply those toggle blocks. If you are editing a template, SyncWarrior Word will evaluate any toggle blocks, but will not apply them.

Text Only

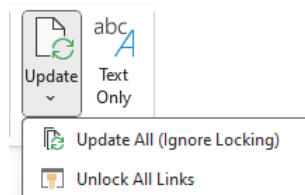
The Text Only button updates unlocked text links. It ignores locked text links, and all picture links and toggle blocks.

Please Note: Text links update much faster than picture links and toggle blocks. If your document contains picture links or toggle blocks, but you only need to update the unlocked text links, then you will save time using the Text Only button.

Update All (Ignore Locking)

The Update All command updates all workbook commands, both [locked and unlocked](#). Like the standard Update command, it attempts to apply toggle blocks in reports, and evaluates them in templates. You access the Update All command from the Update menu, and you access the Update menu from the bottom half of the Update button.

Update Menu (SyncWarrior Word)



Copy Content Between Documents

Before you copy content containing SyncWarrior [commands](#) between documents, you must synchronize the [workbook IDs](#) assigned in the documents. See [Linked Workbooks and Change Workbook ID](#).

Templates

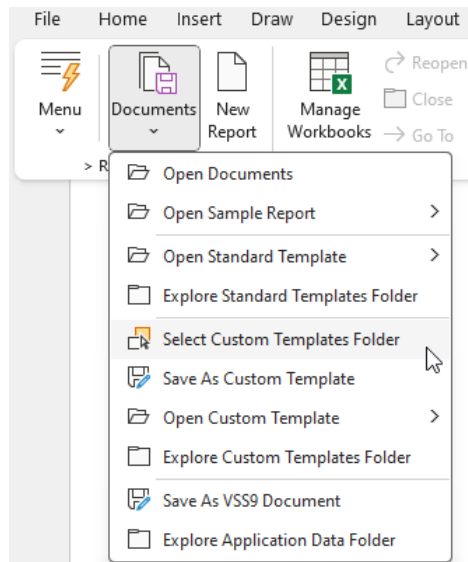
Templates Folders

SyncWarrior has two templates folders:

- The **standard** templates folder is available to all users on your Windows system. These templates may be provided by ValuSource, by your firm's IT personnel, or by anyone with administrative permissions to edit the contents of this folder.
- The **custom** templates folder is only available to your Windows account. These templates may be provided by anyone with administrative permissions to edit the contents of the folder, or they can be [created from your account](#).

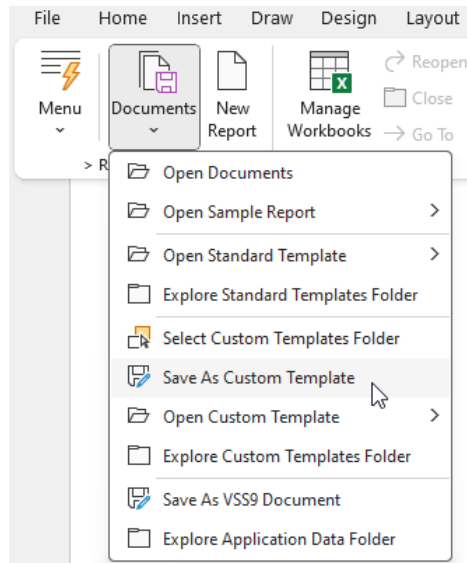
Select the Custom Templates Folder

The command for selecting your custom templates folder is on SyncWarrior Word's Documents menu:



Create a Custom Template

Any Word document can become a SyncWarrior template. To save the active document as a [custom template](#), select the Save As Custom Template command from SyncWarrior Word's Documents menu:



Sample Templates

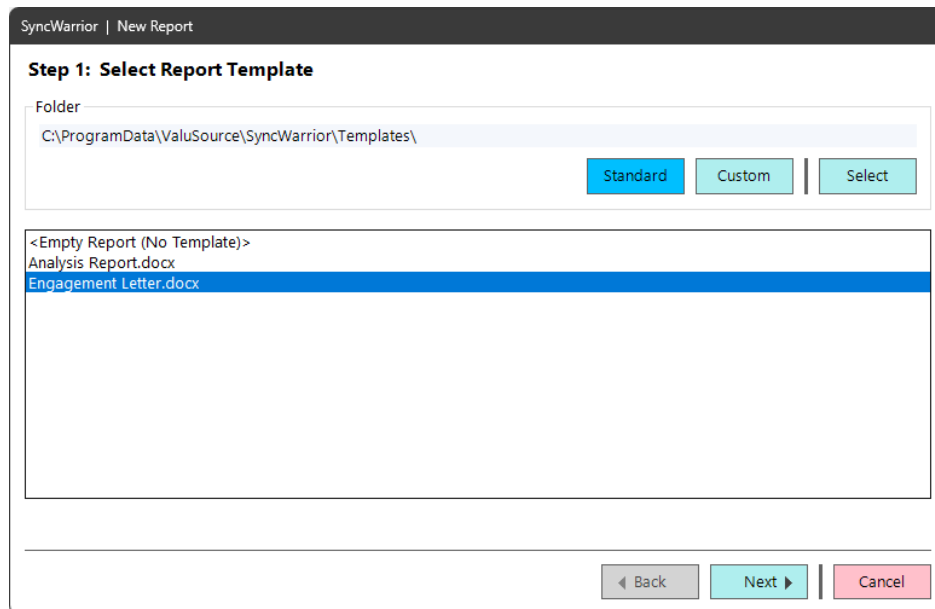
SyncWarrior Word includes two sample templates, installed in the [standard templates folder](#). We discuss each sample template below.

Engagement Letter

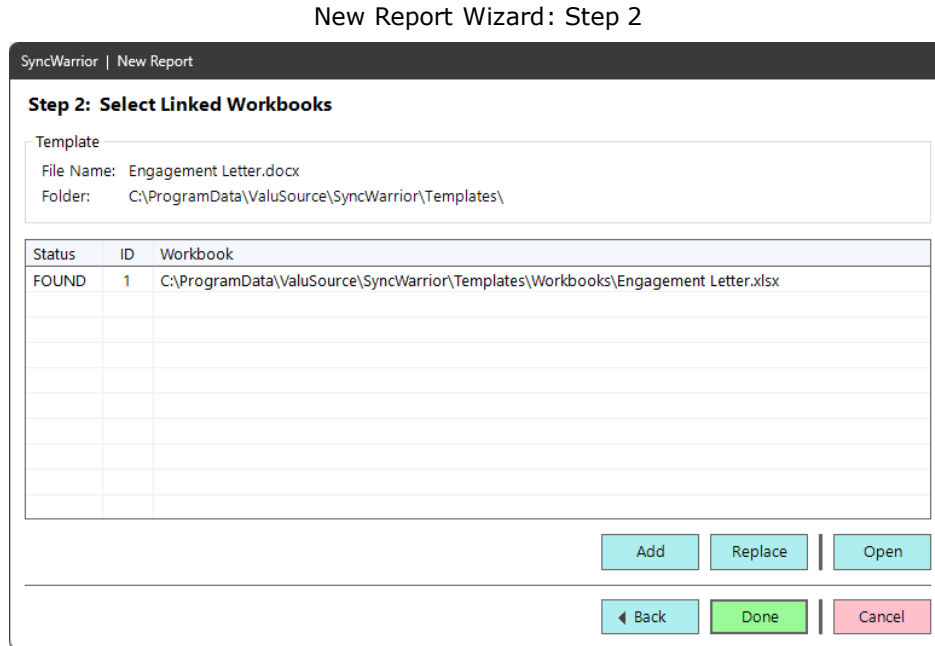
This section discusses [creating a new report](#) using the engagement letter sample template, and provides a basic example of the report creation process.

Click the New Report button. In Step 1 of the New Report Wizard, select the Standard templates folder, then select Engagement Letter.docx from the templates list.

New Report Wizard: Step 1



Click the Next button at the bottom of the form. SyncWarrior Word will open Step 2 of the New Report Wizard.



Click the Open button, just below the workbooks list. SyncWarrior Word will open the linked workbook.

The yellow cells in the Data worksheet of Engagement Letter.xlsx are linked to the engagement letter sample template. The values in these cells affect the content in the generated report.

Data Worksheet in Engagement Letter.xlsx

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1														
2		Client	ABC Contractor Inc.	Current Ratio				Fees			Terms			
3		Payment Terms	net 30	2022	2021	2020	2019	Partner	\$325	per hour			net 10	
4		Letter Date	June 28, 2023	2	1.8	2.2	2	Manager	\$200	per hour			net 30	
5		Engagement Start Date	July 1					Staff	\$125	per hour			net 60	
6		Engagement End Date	September 30, 2023											
7		Tax Returns End Date	December 31, 2022											

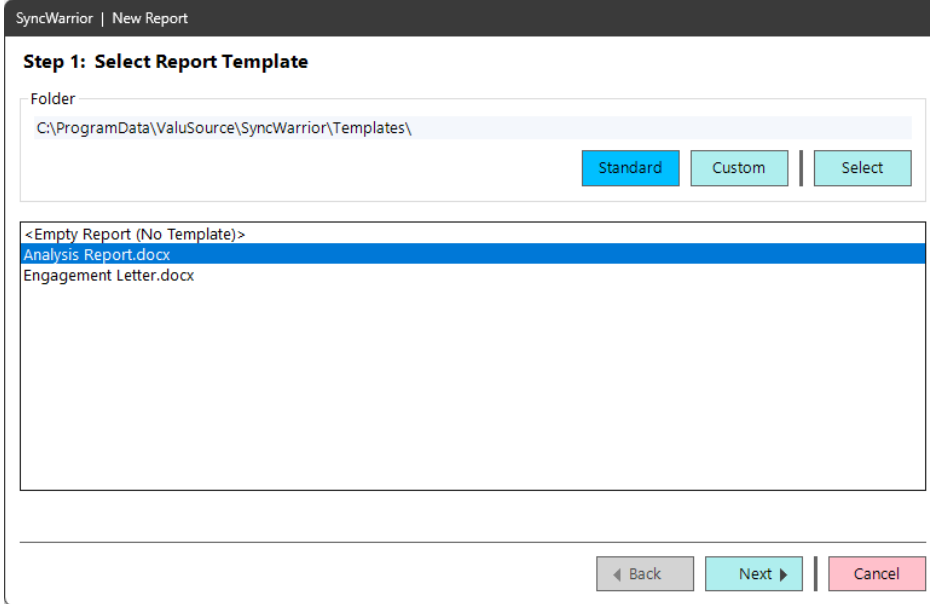
When you're done editing the workbook, return to Word and click the Done button at the bottom of the New Report Wizard. SyncWarrior Word will generate your new report.

Analysis Report

This section discusses [creating a new report](#) using the analysis report sample template, and provides an example of how [toggle blocks](#) work.

Click the New Report button. In Step 1 of the New Report Wizard, select the Standard templates folder, then select Analysis Report.docx from the templates list.

New Report Wizard: Step 1



SyncWarrior | New Report

Step 1: Select Report Template

Folder
C:\ProgramData\ValuSource\SyncWarrior\Templates\

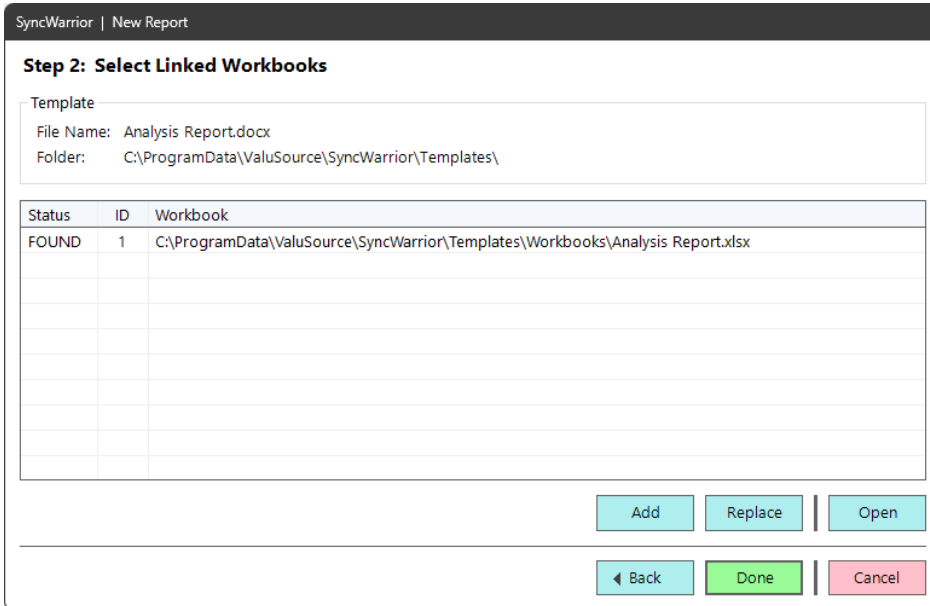
Standard Custom Select

<Empty Report (No Template)>
Analysis Report.docx
Engagement Letter.docx

< Back Next > Cancel

Click the Next button at the bottom of the form. SyncWarrior Word will open Step 2 of the New Report Wizard.

New Report Wizard: Step 2



SyncWarrior | New Report

Step 2: Select Linked Workbooks

Template

File Name: Analysis Report.docx
Folder: C:\ProgramData\ValuSource\SyncWarrior\Templates\

Status	ID	Workbook
FOUND	1	C:\ProgramData\ValuSource\SyncWarrior\Templates\Workbooks\Analysis Report.xlsx

Add Replace Open

< Back Done Cancel

Click the Open button, just below the workbooks list. SyncWarrior Word will open the linked workbook.

Toggles Worksheet in Analysis Report.xlsx

	A	B	C
1			
2		Sections	
3		Introduction	Version 2
4		Section 1	TRUE
5		Section 1.1	TRUE
6		Section 1.2	FALSE
7		Section 1.3	TRUE
8		Section 2	FALSE
9		Section 3	TRUE
10			
11			
12		Introduction	
13		Version 1	FALSE
14		Version 2	TRUE
15		Version 3	FALSE

The yellow cells in the Toggles worksheet of Analysis Report.xlsx are linked to toggle blocks in the analysis report sample template. The values in these cells determine which sections of the template will be included in the generated report.

The first input cell, labeled "Introduction", has an Excel input validation list for selecting which version of the introduction will appear in the generated report. The selected input determines which toggle is turned on in the Introduction section of the worksheet.

Introduction Input List

Introduction	Version 2
Section 1	Version 1
Section 1.1	Version 2
	Version 3

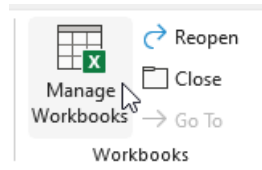
When you're done editing the workbook, return to Word and click the Done button at the bottom of the New Report Wizard. SyncWarrior Word will generate your new report.

Workbooks

Linked Workbooks

To select the workbooks that are linked to your document, or to open linked workbooks, click SyncWarrior Word's Manage Workbooks button. SyncWarrior Word will open the Linked Workbooks Form.

Manage Workbooks Button (SyncWarrior Word)



Linked Workbooks Form

SyncWarrior | Linked Workbooks

Document

File Name: SyncWarrior User Guide.docm
Folder: D:\SyncWarrior\Version 1.1\

Status	ID	Workbook
MISSING	1	E:\Report Project\Workbook 1.xlsx
MISSING	2	E:\Report Project\Workbook 2.xlsx

Add Replace Change ID Combine Rebuild Open Open All Exit

ACTION REQUIRED: Use the Replace and Rebuild buttons to correct the missing workbook(s).

Add Workbooks

To add linked workbooks, click the Add button at the bottom of the Linked Workbooks Form. SyncWarrior Word will open a form for selecting the workbooks that you want to link to your document.

Replace Workbooks

To replace the workbook files associated with one or more [workbook IDs](#), select the ID/workbook pairs that you want to change in the workbooks grid, then click the Replace button at the bottom of the Linked Workbooks Form. SyncWarrior Word will prompt you to choose a workbook for each of the selected IDs.

Remove Workbooks

You can only remove workbooks that are not referenced in the document's content (the [workbook's ID](#) is not used in any SyncWarrior commands), and you can only remove all of these workbooks automatically. See Rebuild the Linked Workbooks.

Workbook IDs

A workbook's ID is a unique integer that identifies the source workbook for the linked data in SyncWarrior commands. Using IDs simplifies management of the workbooks linked to a document.

Change Workbook ID

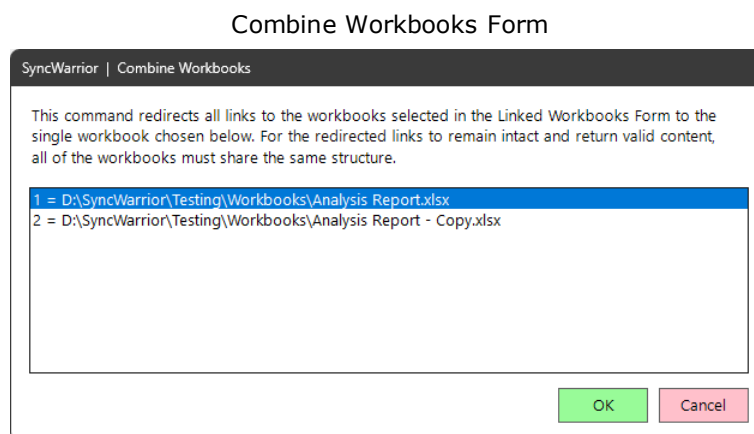
To change a [workbook's ID](#), select it in the workbooks grid, then click the Change ID button at the bottom of the Linked Workbooks Form. SyncWarrior Word will prompt you to choose an ID for the selected workbook.

Combine Workbooks

A common problem users encounter is unintentionally linking a document to multiple copies or versions of the same workbook. The Combine command solves this problem. It redirects all links to the workbooks selected in the Linked Workbooks Form to a single workbook that you choose from among the selected workbooks.

Please Note: For the redirected links to remain intact and return valid content, all of the workbooks that the Combine command is applied to must share the same structure.

1. In the workbooks grid of the [Linked Workbooks Form](#), select the workbooks that you want to combine.
2. Click the Combine button at the bottom of the Linked Workbooks Form. SyncWarrior will open the Combine Workbooks Form (see below), which lists the workbooks that you just selected.
3. Select the workbook that want to retain. All of the links to the other workbooks will be redirected to the workbook that you choose.
4. Click the OK button. SyncWarrior will close the form and redirect the links.



Rebuild the Linked Workbooks

Rebuilding a document's linked workbooks does the following:

- Removes workbooks that are not referenced in the document's content. If none of the [commands](#) in the document use a [workbook's ID](#), then that workbook and ID are removed.
- Adds any [workbook IDs](#) that appear in the document's content but are not assigned to a workbook. These IDs will not have paired workbook files. You will have to add the files manually. See [Replace Workbooks](#).

To rebuild the linked workbooks for the active document, click the Rebuild button at the bottom of the Linked Workbooks Form.

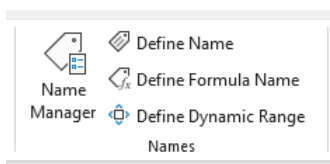
Excel Names

Using Excel names in your SyncWarrior links makes them more robust and reliable. A link to a range address can be broken by moving the target content to another location in the workbook. A link to an Excel name is unaffected by the location of the content within the workbook, and will not be broken if the content is moved.

To get started with Excel names, see the following web page: [Define and use names in formulas](#).

SyncWarrior Excel's commands for creating Excel names are in the Names Ribbon Group.

Names Ribbon Group (SyncWarrior Excel)



Name Manager

The Name Manager is an Excel form that lets you manage the names in the active workbook. To access the Name Manager, click its button in the SyncWarrior Excel ribbon. For help using the Name Manager, see the following web page: [Use the Name Manager in Excel](#).

Define Name

The Define Name command opens Excel's New Name form. For help using the New Name form, see the following web page: [Create a named range in Excel](#).

Please Note: Excel disables the Define Name command when the active worksheet is protected. For more information, see the following web page: [Protect a worksheet](#).

Define Formula Name

Many Excel users are unaware that Excel names are not limited to range addresses, and that you can also define names for formulas. The formula appears only in the name definition, and not on a worksheet. This is useful when:

- You do not want the formula to appear in a worksheet, where it can easily (and accidentally) be modified, deleted, or overwritten.
- The formula's result is used throughout the workbook, in various calculations, and no one location in the workbook is obviously the best place for it.
- The formula is not used in the workbook itself, but will be referenced from outside of the workbook. For example, in a Word document via a SyncWarrior link.

SyncWarrior Excel's Define Formula Name command lets you assign a workbook-scope name to the formula in the active cell. The new name will not point to the cell, but instead will contain the formula from the cell. Changes to the original formula, in the selected cell, will not affect a name that was created from it. This means that you can:

1. Create your formula in a worksheet cell, using all of Excel's features.
2. Use the Define Formula Name command to create a name from your formula.
3. Remove the formula from the cell.

Define Dynamic Range

A dynamic range is defined by a formula and can change size, shape, and location when the formula recalculates. SyncWarrior Excel's Define Dynamic Range command creates an Excel name with a formula that uses an [OFFSET function](#) to calculate a dynamic range.

Example: You have a workbook that accepts ten years of financial data, entered in columns, but you don't always enter all ten years. You want to define a dynamic range that returns just the years that you have entered, and omits the empty columns.

The Define Dynamic Range command opens a task pane that you use to create your formula and to assign it a name. Each section of the task pane is explained below.

Anchor Range

The anchor range is the starting point for the dynamic range. All of the other values in the OFFSET function are relative to the anchor range.

- ➔ Click the **Selection** button to set the anchor range to the selected cell or range.
- ➔ Click the **Name** button to choose an Excel name for the anchor range.

In the example below, we've selected the data labels in the first column of the worksheet.



Row Offset

The row offset is the number of rows from the first row of the anchor range to the first row of the dynamic range. In the example below, since our data is in columns and our anchor range contains the row labels, we've used the Number command to set our row offset to zero.

Row Offset

Number =

Column Offset

The column offset is the number of columns from the first column of the anchor range to the first column of the dynamic range. In the example below, since our data is in columns and our anchor range contains the row labels, we've used the Number command to set our column offset to one.

Column Offset

Number =

Height (Number of Rows)

The height is the number of rows in the dynamic range. In the example below, since our anchor range contains the row labels, we've omitted the height setting. The dynamic range will have the same height as the anchor range.

Height (Number of Rows)

Omitted = Same as Anchor Range

Width (Number of Columns)

The width is the number of columns in the dynamic range. In the example below, we've used the Name command to select an Excel name ("YearCount") we defined that calculates the number of completed years in the data.

Width (Number of Columns)

Name = [YearCount](#)

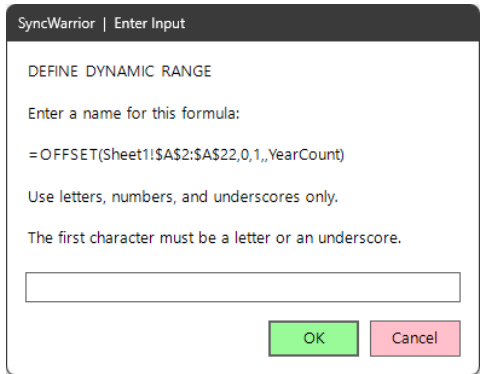
Formula

To see where your dynamic range is currently located, click on its formula in the Formula section of the task pane. SyncWarrior Excel will select the dynamic range.

Formula

[=OFFSET\(Sheet1!\\$A\\$2:\\$A\\$22,0,1,YearCount\)](#)

To assign a name to your dynamic range formula, click the Define Name button. SyncWarrior Excel will prompt you to enter a name for your dynamic range.

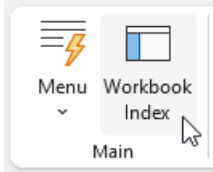


Workbook Index

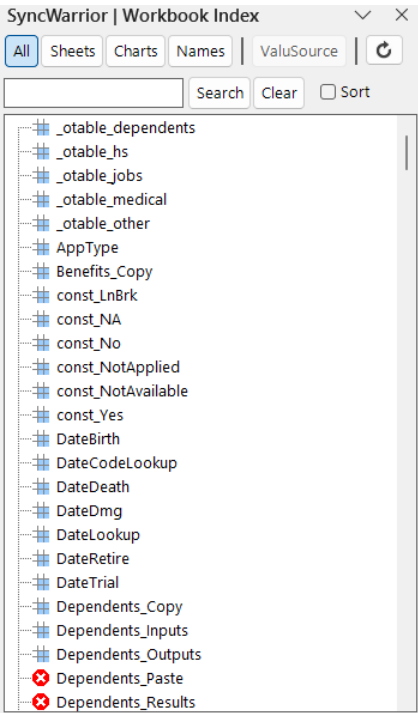
Many of our customers use large workbooks with numerous worksheets, charts, and names. That's why we created Workbook Index, which makes finding the relevant Excel content quick and easy. Workbook Index puts everything in one place, and can be searched by text string. Workbook Index also reads the Navigator data in ValuSource valuation workbooks.

To access Workbook Index, click on the Map button in the SyncWarrior Excel ribbon. The Workbook Index task pane will appear to the left of your worksheets.

Workbook Index Button
(SyncWarrior Excel)



Workbook Index Task Pane
(SyncWarrior Excel)

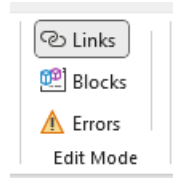


Links

Edit Mode

To work with links, set SyncWarrior Word's [Edit Mode](#) to Links:

Edit Mode Ribbon Group (SyncWarrior Word)



Add a New Link to a Document

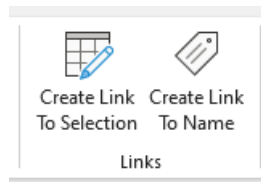
To add a new link to a document:

1. First you [create the link](#).
2. Next you [paste the link](#) into your document.

Create a Link

SyncWarrior Excel has two commands for creating links. The first command creates a link to the selection in the active workbook, and the second command creates a link to an [Excel name](#):

Links Ribbon Group (SyncWarrior Excel)



SyncWarrior Word also provides a command for creating a link to an Excel name:

Insert Link To Name (SyncWarrior Word)



Create Link To Selection

You can link to a worksheet range, a chart sheet, or a chart object. If a single cell or merged cells are selected, SyncWarrior Excel will create a [text link](#). If multiple cells, a chart sheet, or a chart object are selected, SyncWarrior Excel will create a [picture link](#).

When you click the Create Link To Selection button:

- ➔ If a range is selected, and the workbook has a named range with the same address, then SyncWarrior Excel will ask if you want to create a link to the name, or to the address.
- ➔ If you're creating a text link, SyncWarrior Excel may prompt you to enter an alias. For more information, see [Text Link Aliases](#).

To complete your link, [paste it](#) into your document. If you entered an alias, [paste both the link and the alias](#) into your document.

Create Link To Name

As mentioned [above](#), both SyncWarrior addins support linking to an [Excel name](#). The SyncWarrior Excel command links to a name in the active workbook, while the SyncWarrior Word command links to a name in any of the workbooks linked to the active document.

Both commands open the Select Name form (see below). In SyncWarrior Word, the form includes the Workbook column in the names data grid. In SyncWarrior Excel, since the form only shows the names from the active workbook, the Workbook column is omitted.

Please Note: SyncWarrior Word must load the linked workbooks to read the names data. This means that SyncWarrior Word can require some time to load the Select Name form.

Select Name Form

SyncWarrior | Select Name

	Workbook	Name	Formula	Value	Comment
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Name Scope</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">[All]</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Workbook</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Worksheet</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Name Returns</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">All</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Range</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Value</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Value Type</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">[All]</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Array</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Boolean</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Date</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Error</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Number</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">String</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">[Other]</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px; width: fit-content; margin-left: 10px;">Reset All</div>	[1] Analysis Report.xlsx	Author	=xLinks!\$C\$2	Alice Q. Datasluethx	
	[1] Analysis Report.xlsx	BookScopeName	=xLinks!#REF!	#REF!	
	[1] Analysis Report.xlsx	Most_Recent_Year	=xLinks!\$F\$3	2022	
	[1] Analysis Report.xlsx	One_Year_Prior	=xLinks!\$F\$4	2021	
	[1] Analysis Report.xlsx	Report_Date	=xLinks!\$C\$4	November 20, 2024	
	[1] Analysis Report.xlsx	xLinks!SheetScopeName	=xLinks!#REF!	#REF!	
	[1] Analysis Report.xlsx	test	=xLinks!#REF!	#REF!	
	[1] Analysis Report.xlsx	Today	=TODAY()	45616	
	[1] Analysis Report.xlsx	Two_Years_Prior	=xLinks!\$F\$5	2020	
	[2] Engagement Letter.xlsx	Client	=xDat!\$C\$2	ABC Contractors LLC	
	[2] Engagement Letter.xlsx	EngagementEndDate	=xDat!\$C\$6	September 30, 2023	
	[2] Engagement Letter.xlsx	EngagementStartDate	=xDat!\$C\$5	July 1	
	[2] Engagement Letter.xlsx	Fees	=xDat!\$J\$2:\$L\$5	Array(Fees, , , Partner, \$325, p...	
	[2] Engagement Letter.xlsx	HourlyRate	=xDat!\$K\$3:\$K\$5	Array(\$325, \$200, \$125)	
	[2] Engagement Letter.xlsx	LetterDate	=xDat!\$C\$4	November 6, 2024	
	[2] Engagement Letter.xlsx	PaymentTerms	=xDat!\$C\$3	net 30	
	[2] Engagement Letter.xlsx	TaxReturnsEndDate	=xDat!\$C\$7	December 31, 2022	
	[2] Engagement Letter.xlsx	Terms	=xDat!\$N\$3:\$N\$5	Array(net 10, net 30, net 60)	
	[2] Engagement Letter.xlsx	test	=FALSE	False	
	[3] VSP Sample Project.vsp9.xlsx	DebtCoe	=CoeCapRateBuildup!\$R\$15		
[3] VSP Sample Project.vsp9.xlsx	DebtCoe	=CoeCapRateBuildup!\$R\$15			

Count = 100

Use the form to choose the name you want to link to, then click the Select button at the bottom. If the name's formula references a single cell (including merged cells) or returns a value, SyncWarrior will create a [text link](#). If multiple cells, a chart sheet, or a chart object are selected, SyncWarrior will create a [picture link](#).

Creating a Link from SyncWarrior Excel

If you're creating a [text link](#) from SyncWarrior Excel, when you click the Select button in the Select Name form, you may be prompted to enter an alias. For more information, see [Text Link Aliases](#).

- ➔ To complete your link, switch from Excel to Word and [paste it](#) into your document.
- ➔ If you entered an alias, [paste both the link and the alias](#) into your document.

Data Filters

On the left side of the [Select Name form](#) are three filters that can limit the names that appear in the data grid:

- **Name Scope** can include all names in each workbook, names that are available to the entire host workbook, or names that are only available to a specific worksheet within that workbook.
- **Name Returns** can include all names, names that return a worksheet range (including a single cell), or names that do not return a range and instead return a value.
- **Value Type** can filter names by the type of value the name returns, independent of whether the value is returned directly from the name's formula, or from the range that is returned by the name's formula.

To return the filters to their default settings, which includes all names, click **Reset All**.

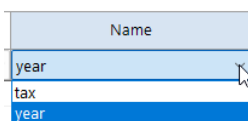
Filtering by Column

You can also filter the names by searching for text in the data columns:

1. Select the data column you want to search by clicking its header. For example, to search the Value column, click "Value".
2. Type the text you want to search for into the text box at the top of the form. The text box is automatically activated when you click a column header.
3. Press [Enter] or click Search. SyncWarrior will add the search text to the drop down list below the column header and filter out names that do not match the search criteria.

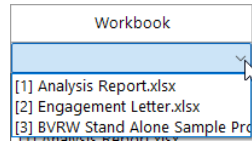
Workbook	Name	Formula	Value	Comment
[1] Analysis Report.xlsx	Most_Recent_Year	=Links!\$F\$3	2022	
[1] Analysis Report.xlsx	One_Year_Prior	=Links!\$F\$4	2021	
[1] Analysis Report.xlsx	Two_Years_Prior	=Links!\$F\$5	2020	
[3] BVRW Stand Alone Sample ...	rngYearDirection	=VsProperties!\$I\$13	1	

To remove the current filter from the active column, click the Clear button at the top of the form. You can change the filter applied to a column from the column's drop down list:



Workbook Column Filter

When you open the [Select Name form](#) from SyncWarrior Word, the filter list for the Workbook column automatically contains the workbooks linked to the active document:



Select a Link

You select a link by selecting its content:

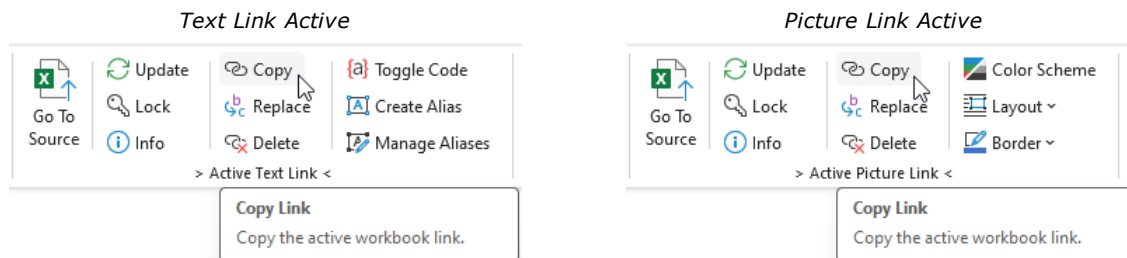
- ➔ To select a [text link](#), click the link's text.
- ➔ To select a [picture link](#), click the link's image.

Copy a Link

To copy a link:

1. [Select the link](#) that you want to copy.
2. Click the Copy Link button.

Copy Link Button (SyncWarrior Word)



Paste a Link

Please Note: When you paste a link, if the source workbook is not linked to your document, SyncWarrior Word automatically [links the workbook](#). You do not have to link it manually.

After you [copy a link](#) or [create a link](#), you can paste the link into your document:

1. Select the location for the new link.
2. Click the Paste Link button.

Paste Link Button (SyncWarrior Word)



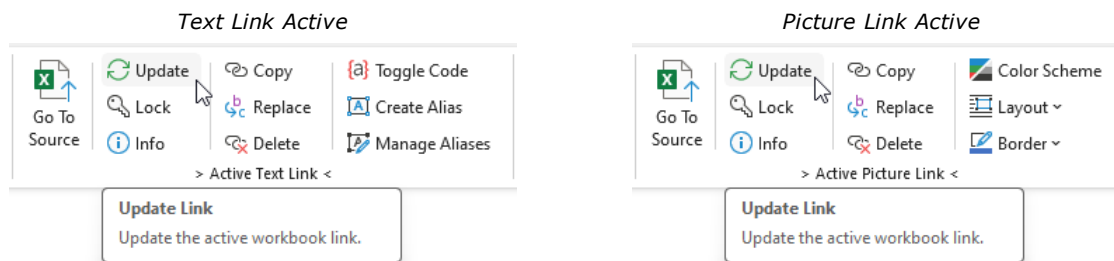
Please Note: If you can't find the Paste Link button, make sure that Edit Mode is set to Links. If you still don't see the button, then SyncWarrior Word cannot insert a Word DOCVARIABLE field at your selected location in the document.

Update a Link

Updating a link retrieves the current data from the linked workbook. To update a link:

1. [Select the link](#) that you want to update.
2. Click the Update Link button.

Update Link Button (SyncWarrior Word)



Replace a Link

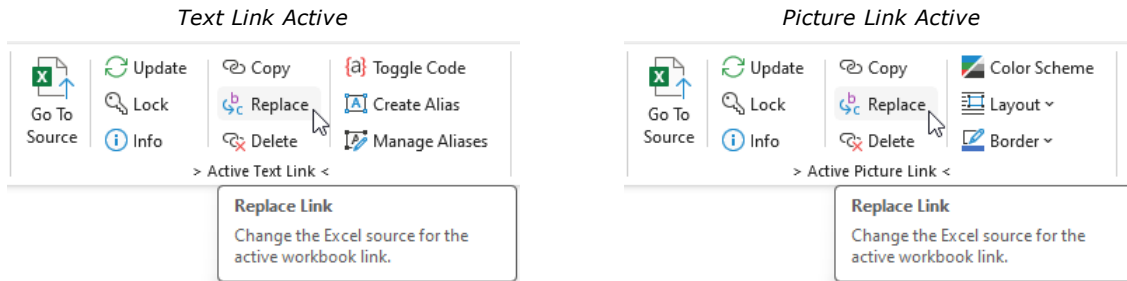
Example: You have a text link that points to the wrong cell. You can replace the incorrect link with the correct one.

Please Note: You can only replace a link with another of the same type. You cannot replace a text link with a picture link, or a picture link with a text link.

To replace an old link with a new link:

1. Start in Excel and [create the new link](#), or start in Word and [copy the new link](#).
2. In your document, [select the old link](#).
3. Click the Replace Link Button.

Replace Link Button (SyncWarrior Word)

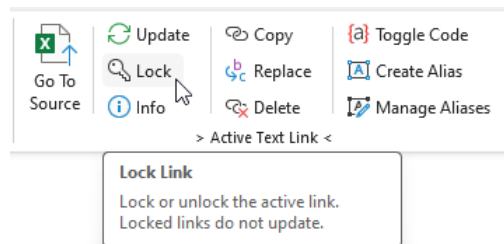


Lock or Unlock a Link

A locked link does not update, unless you choose to [ignore locking](#). To lock or unlock a link:

1. [Select the link](#) that you want to lock or unlock.
2. Click the Lock Link Button. SyncWarrior Word will open the Lock Link form.

Lock Link Button (Text Link Active)



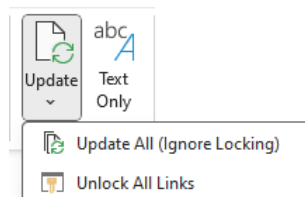
Lock Link Form



Unlock All Links

Locked links do not update, unless you choose to [ignore locking](#). To unlock all of the links in your document, select Unlock All Links from the Update menu.

Update Menu (SyncWarrior Word)

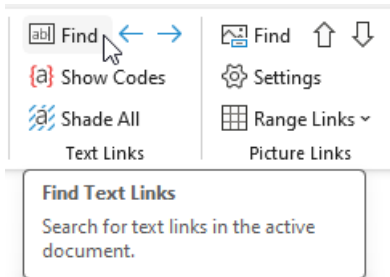


Text Links

Find Text Links

The Find button in the Text Links ribbon group lets you search for text link commands by text string. SyncWarrior Word looks for matching text in the command results (the text that the command retrieves from the linked workbook) or in the command itself.

Find Text Links Button (SyncWarrior Word)



Go To Previous / Go To Next

To the right of the Find button in the Text Links ribbon group are two arrow buttons that move the selection to the previous text link (left arrow) or the next text link (right arrow).

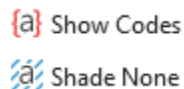
Go To Previous / Go To Next Buttons



Fields Codes and Shading

Below the Find button and the arrow buttons in the Text Links ribbon group are buttons that control how Word displays fields in the active document. The Show Field Codes button toggles between the display of field content and field codes. The Field Shading button switches between the three field shading states: all fields shaded, only the active field shaded, or no fields shaded.

Field Display Buttons



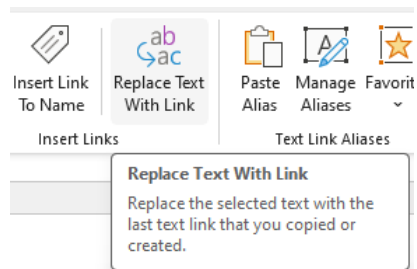
Replace Text with a Text Link

Example: Your document contains numerous instances of a client's company name, which is "XYZ Company". You can replace every instance of "XYZ Company" with a link to a cell that contains the client's company name.

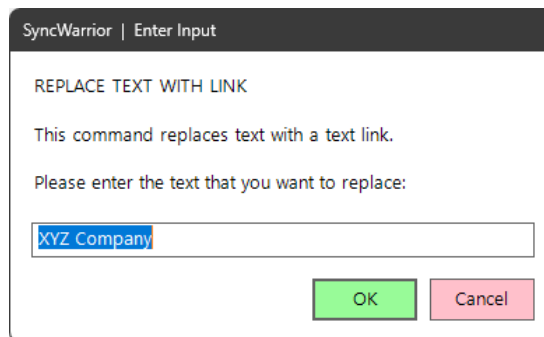
To replace text with a [text link](#):

1. Start in Excel and [create the text link](#), or start in Word and [copy the text link](#).
2. In your document, you can select the text you want to replace. This step is not necessary.
3. Click the Replace Text With Link button. SyncWarrior Word will prompt you to enter the text you want to replace. Any selected text will appear in the prompt.

Replace Text With Link Button (SyncWarrior Word)



Replace Text With Link Prompt (SyncWarrior Word)



4. Click the prompt's OK button. SyncWarrior Word will replace every instance of the text you entered with the text link that you created or copied.

Text Link Aliases

Description

SyncWarrior lets you define aliases for text links, which makes it faster and easier to paste those text links into your document.

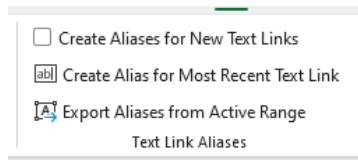
Example: You create a text link to a cell that contains your customer's name and assign it an alias of "Customer". Whenever you need to insert that link into your document, you select the Customer alias.

You can create text link aliases using both SyncWarrior Word and SyncWarrior Excel, but they are stored in your document by SyncWarrior Word. You edit aliases in SyncWarrior Word.

Creating Text Link Aliases in Excel

SyncWarrior Excel has three ribbon controls for creating text link aliases.

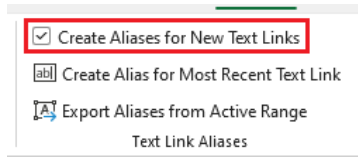
Text Link Aliases Ribbon Group (SyncWarrior Excel)



Create Aliases for New Text Links

When SyncWarrior Excel's Create Aliases for New Text Links checkbox is filled, you are prompted to enter an alias when you [create a text link](#). To add the new text link and its alias to your document, [paste them in](#).

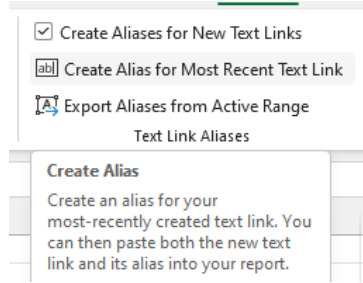
Create Aliases for New Text Links Checkbox (SyncWarrior Excel)



Create Alias for Most Recent Text Link

To create an alias for the text link that you created most recently, click the Create Alias for Most Recent Text Link button. SyncWarrior Excel will prompt you to enter an alias. To add the new text link and its alias to your document, [paste them in](#).

Create Alias for Most Recent Text Link Button (SyncWarrior Excel)



Export Aliases from Active Range

You can define multiple aliases using a range. The first column of the range must contain the aliases, and the second column must contain the target cells for the text links. All of the cells surrounding the range must be empty. For example:

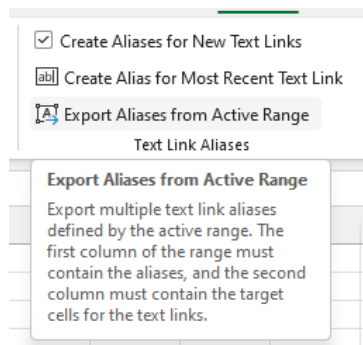
Aliases Export Range (Example)

Customer	ABC Widgets		
Date	May 30, 2023		
Location	Clarksville		
Status	Completed		

To export aliases from such a range and import them into your document:

1. Select any cell in the range.
2. Click the Export Aliases from Active Range button.
3. Switch to Word, open the Text Link Aliases Form, and click the Import button. See Manage Aliases.

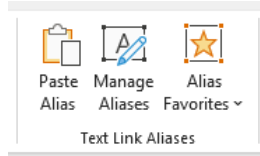
Export Aliases from Active Range Button (SyncWarrior Excel)



Working with Text Link Aliases in Word

Most of the commands for text link aliases are in SyncWarrior Word's Text Link Aliases Ribbon Group.

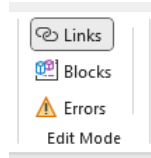
Text Link Aliases Ribbon Group (SyncWarrior Word)



Edit Mode

To work with text links aliases in Word, set SyncWarrior Word's Edit Mode to Links:

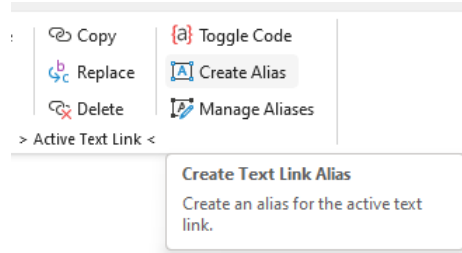
Edit Mode Ribbon Group (SyncWarrior Word)



Create Alias

You can create an alias for an active text link. [Select the text link](#) that you want to create an alias for, then click the Create Alias button in the Active Text Link Ribbon Group. SyncWarrior Word will prompt you to enter a name for the new alias.

Create Alias Button (SyncWarrior Word)

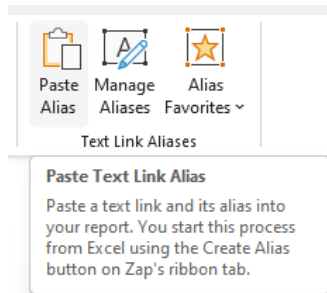


Paste Alias

To paste both the most-recently created alias and its text link into your document:

1. Select the location for the new text link.
2. Click the Paste Alias button.

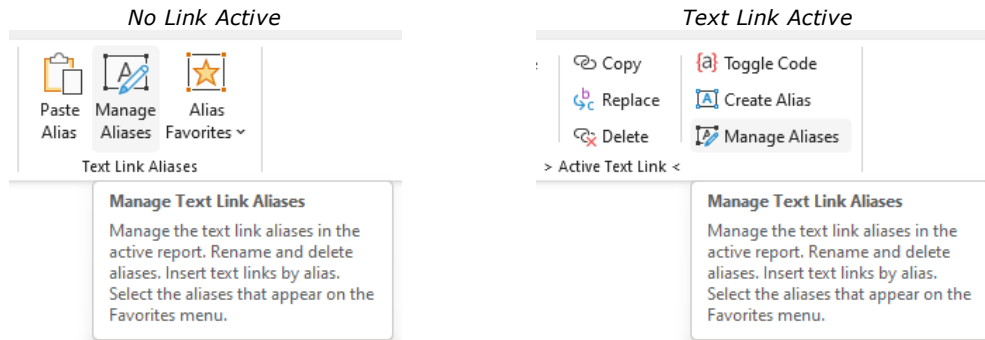
Paste Alias Button (SyncWarrior Word)



Manage Aliases

To edit your document's text link aliases, click the Manage Aliases button, which takes two forms and appears in two places (see below). SyncWarrior Word will open the Text Link Aliases form.

Manage Aliases Button (SyncWarrior Word)



Text Link Aliases Form

SyncWarrior | Text Link Aliases

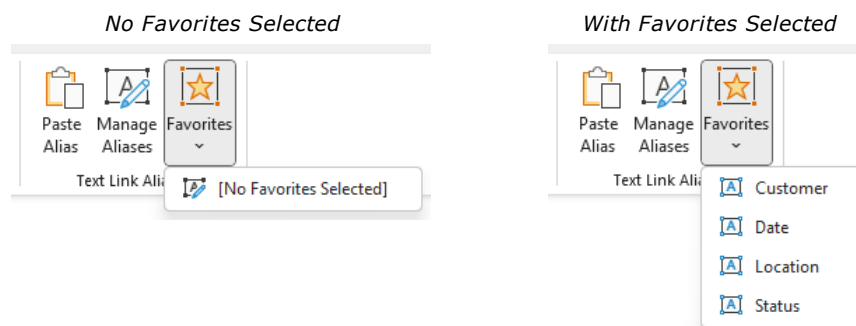
Favorite	Alias	Text
True	Appraiser Name	Joe Appraiser
True	Business Name	Child's Clothing Store
	Firm Name	Appraiser PC
	Governing Standard	59-60
	Purpose	Planning
	Report Addressee	Ms. Kim Attorney
True	Report Date	April 15, 2019
True	Single vs Plural I am, we are	I am
True	Single vs Plural I am, We are	I am

Info Favorite Rename Delete Import Filter Insert Exit

Favorites Menu

The Favorites menu provides quick access to the text link aliases that you use most often. When you select an alias from the menu, SyncWarrior Word inserts its text link into your document. You select an alias as a favorite from the Text Link Aliases Form. See Manage Aliases.

Favorites Menu (SyncWarrior Word)

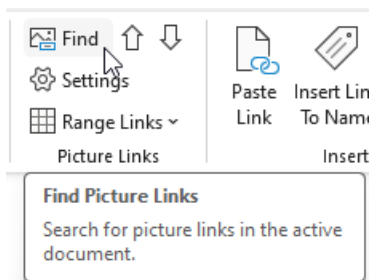


Picture Links

Find Picture Links

The Find button in the Picture Links ribbon group lets you search for picture link commands by text string. SyncWarrior Word looks for matching text in the command itself.

Find Picture Links Button (SyncWarrior Word)



Go To Previous / Go To Next

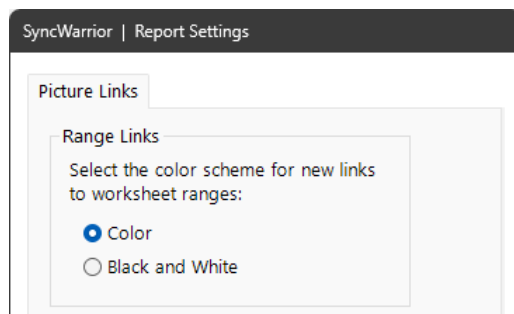
To the right of the Find button in the Picture Links ribbon group are two arrow buttons that move the selection to the previous picture link (up arrow) or the next picture link (down arrow).

Go To Previous / Go To Next Buttons



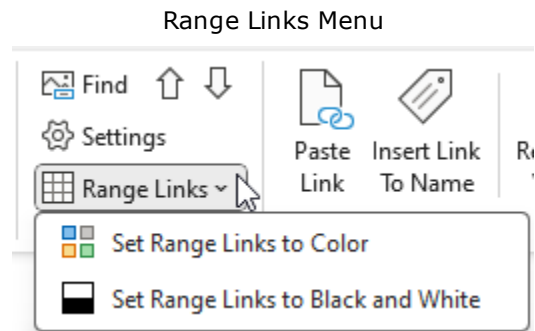
Picture Link Settings

Click the Settings button in the Picture Links ribbon group to select the color scheme for new links to worksheet ranges.



Range Links

Use the Range Links menu to select a color scheme for all of the range links in the active document.

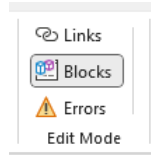


Toggle Blocks

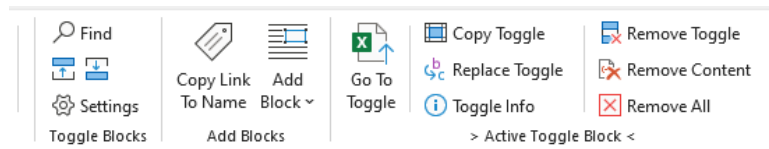
Edit Mode

To work with [toggle blocks](#), set SyncWarrior Word's Edit Mode to Blocks:

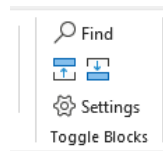
Edit Mode Ribbon Group (SyncWarrior Word)



When you're editing a template, you will see all of the ribbon controls for working with toggle blocks:



When you're editing a report, you will only see the Toggle Blocks ribbon group:



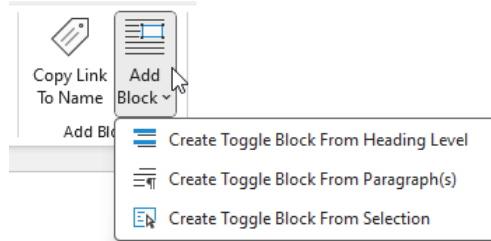
The Toggle Blocks ribbon group appears when you're editing a report in case there were errors when you generated the report and toggle blocks remain in the document. In that situation you use these controls to locate the toggle blocks.

Add a Toggle Block

To add a toggle block to your template:

1. Go to Excel and [create a link](#) to the Boolean value that will turn the block on and off, or use the Copy Link To Name command in the Add Blocks ribbon group (see above). The Copy Link To Name command opens the [Select Name form](#) with the [Value Type data filter](#) set to Boolean.
2. Switch to Word and select the block's content in your template. How you do that depends on the command you plan to use. You can read about the commands below.
3. Select a command from the Add Block menu.

Add Block Menu (SyncWarrior Word)



Create Toggle Block From Heading Level

This command creates a toggle block from the active heading level. You create heading levels by applying Word's heading styles (Heading 1, Heading 2, etc.) to your document, or by applying outline levels to styles or paragraphs.

Create Toggle Block From Paragraph(s)

This command creates a toggle block from the active paragraph or paragraphs. The toggle block will include every paragraph in the selection, including the paragraphs that contain the beginning and end of the selection.

Create Toggle Block From Selection

This command creates a toggle block from the active selection. The only content in the toggle block will be the content in the selection.

Remove a Toggle Block

To remove a toggle block from your template:

1. Place your selection within the toggle block that you want to remove. If you have nested toggle blocks, place your selection in the block that you want to remove, but not within any child blocks that it may contain.
2. Select one of the commands explained below.

Remove Toggle Block Commands (SyncWarrior Word)



Remove Toggle

Remove the toggle block itself. Keep the content that the toggle block contains.

Remove Content

Remove the content inside the toggle block. Keep the toggle block itself.

Remove All

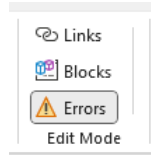
Remove both the toggle block and its content.

Errors

Edit Mode

To resolve errors, set SyncWarrior Word's Edit Mode to Errors:

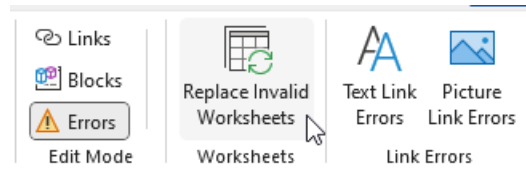
Edit Mode Ribbon Group (SyncWarrior Word)



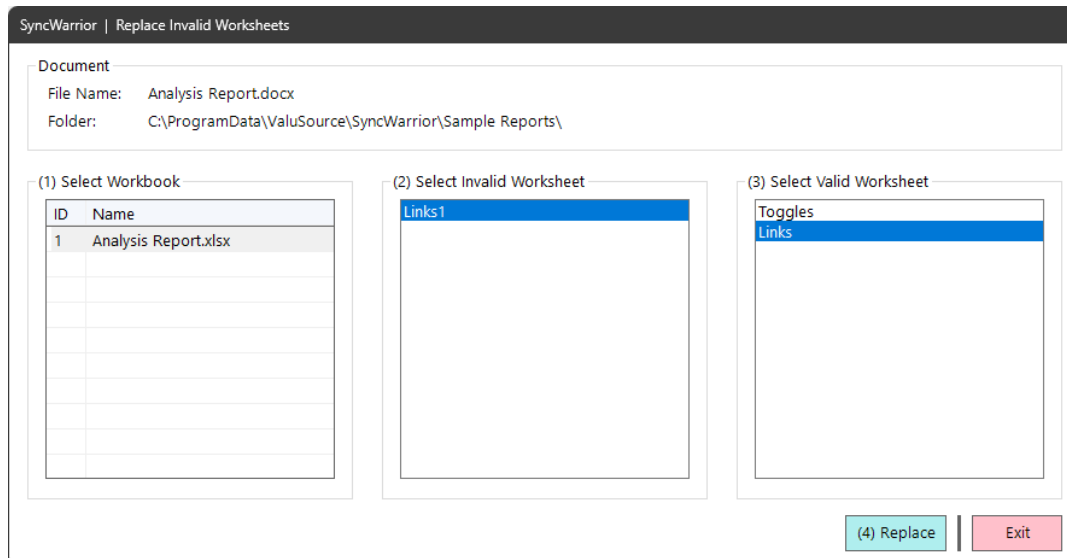
Replace Invalid Worksheets

If the name of a worksheet changes, all commands linked to that worksheet will return errors when you [update your document](#). Since invalid worksheet names can cause errors in text links, picture links, and toggle blocks, you should replace any invalid worksheets before you start reviewing errors in links and blocks. To start this process, click the Replace Invalid Worksheets button. SyncWarrior Word will open the Replace Invalid Worksheets form.

Replace Invalid Worksheets Button (SyncWarrior Word)



Replace Invalid Worksheets Form (SyncWarrior Word)

A screenshot of the 'Replace Invalid Worksheets' form in SyncWarrior Word. The form has a title bar 'SyncWarrior | Replace Invalid Worksheets' and a 'Document' section with 'File Name: Analysis Report.docx' and 'Folder: C:\ProgramData\ValuSource\SyncWarrior\Sample Reports\'.

(1) Select Workbook	
ID	Name
1	Analysis Report.xlsx

(2) Select Invalid Worksheet
Links1

(3) Select Valid Worksheet
Toggles
Links

(4) Replace | Exit

Review Errors

The process for reviewing errors is the same for text links, picture links, and toggle blocks. When you click on the corresponding ribbon button (see below), SyncWarrior Word opens a task pane for reviewing the errors of the selected command type.

Errors by Command Type Buttons (SyncWarrior Word)

