Training Cards

This file includes training cards for 602Text used for **Mail Merge** and **Intelligent Templates.** Do not delete or change its location on the disk.

The following cards will take you step by step through the process preparation of a **Mail Merge.** Select the option "New" in the File menu to create a new document and then click "Next" to continue.

Next

If you have a data source already created, select the option "Select data source"; if not, then select "Create a data file."

- **Select data source**
- **Create a data file**

Select the option New in the File menu. To continue, click on "Database setup".

🟡 **Database setup**

Data file

To save this file, click on ¨Save the created file as *.dta¨.

🟡 **Save the new file as *.dta**

Select the directory into which the created data file will be saved, enter its name and then click the button **Save.**

Select the directory in which your data file can be found, enter its name and then click the button **Select.**

Now create a document and insert fields at the positions you selected using the "Insert mail merge field" button. After having prepared the document for printing, click on the button "Print mail merge".

🟡 **Insert a mail merge field**

🟡 **Print mail merge**

Select the field type for merging and click the button **OK** (the field shall be inserted into the document at the position of the cursor).

Select the type of the printer and specify whether you want to print the document for all items in the data file at once, or only some of them. Click the **OK** button to start printing.

On the first line, enter the names of the items you want to enter and separate them with a comma (,). The names should be all in upper case letters and must not contain any diacritic. On the remaining lines, enter data directly instead of the item names (you may use diacritic). The data you enter must always be separated with a comma; items to be skipped should be replaced with a space.

Example:

NUMBER, NAME, SURNAME, FAX,
001, John, Smith, 34151459,
002, Mike, Jagger, 34564628,
003, Anthony, Rockell, 48967531,

Now select the option "Open" in the File menu and open the data file you want to edit. When finished, click **Save.**

🟡 **Save**

No file has been previously indexed. Click on "Index" to index all selected files or "Cancel" to quit Agent602.

🔘 **Index**

🔘 **Cancel**

Now you have an option to use the dialog **Find file** to select files for which indexes should be created. If you do not select the name of the searched file, all the files in the given folder will be matched. Click the button **Start** to start searching for the files. If you do not want to search for the files, click on **Cancel** to exit this dialog.

The **Agent602** window displays the files you have selected for indexing. If the search was not successful, you can return to the **Find File** dialog by clicking its button on the toolbar.

You can now select whether you want to continue indexing or not.

- Continue indexing
- End

Use the **Browse** dialog to select the name of the folder in which you want to search for files and then click the **OK** button.

Create an Intelligent Template Using the Wizard

These cards help you create your own macro using the **Intelligent template wizard.** The intelligent template includes a local macro that is started upon opening the template. This macro includes dialogs the user gradually fills in. This data is sent into the existing template into the places with pre-prepared bookmarks and the entered data can be stored in a select database. First you need to create this template or you may latter in wizard assign document to be template. For continue by clicking **Next.** If you want to run the Wizard without help, select **Start Wizard without help.**

🟡 **Start Wizard without help**

🟡 **New document**

🟡 **Open template**

🟡 **Next**

Fill in this template with the selected text. At places where text from the filled dialogs are sent, enter spaces on both sides (these spaces are used to prevent joining with the neighboring text), place the cursor there and insert the **Bookmark.** This bookmark will be used as a pointer for the filled data. For continue by clicking **Next.**

 Insert Bookmark

 Next

Generate New Project

Use this dialog to set the main characteristics of the project, such as name, number of dialogs or presentation of a picture.

Use item **Project name** to enter the name that will represent the project. This name can also be used   to save the project of the macro.

Enter the **Dialog number** in the assumed extent.

If you want to present a picture in the dialog, select **Find picture.**

If you want to edit an existing project, use the option **Load existing project** to load the project.

If have a document template is created in advance, you can include it into the project by clicking the search button (**…**).

You can use a Mail Merge database by select **Using database** for this template into which data from the dialogs of the intelligent template will be gradually saved. It means that the entered data can be stored in this database.

To continue, click **Continue.**

Template Design

Use this dialog to set the number and layout of each dialog in the intelligent template.

Use the option **Common Shape** to edit the common form of the inserted dialogs.

Use the button **Add (+)** or **Delete (-)** to add or delete a dialog and simultaneously set the **Dialog Position** in the order in which they should be filled in.

After adding a dialog, you can edit its layout by selecting the option **Edit** or double clicking on the name of the dialog in the list or use the button **Edit one dialog** for the selected dialog.

Use the option **Title** to edit the title of the selected dialog.

You can enter an **Input line** and its descriptive **Insert static Text** and presentation **Picture** into the dialog.

You may also insert the combo box or the list box to dialog. You may insert there own precreated item list

If you want to check the template during filling, whether all edit fields in the dialog are filled in, check the box **Control filling edit box.**

Confirms all final preferences of the intelligent template and saves it to a template.

To create the source of the macro, use the option **Generate.**
You can test the intelligent template using the option **Test.**
Use the option **Save project** to save the designed macro.
Next save the intelligent template (format *WPT).

Generate Project

The generated source of the macro in the current document can be compiled using the command **Generate.**

 Compile Macro

Save Project

The generated source macro in the current document can be saved to the disk (for example if there is a need to edit the code in the future) or the document can be cancelled using the command **Cancel Document.**

 Cancel Document

Set Macro as Local and Rename

For the current template document with bookmarks, use the dialog **Executable Macros** to set the **Local Placement** for the compiled macro and rename the macro to **AutoNew** (this name commands the start of the macro upon opening the template).

⬤ **Set Macro As Local and Rename**

Saving the Template

Save the template as **(*WPT).** The intelligent template is complete and ready for use. Now you can just open the template and fill in the dialogs.

 Save Template

Create Database

Now you can create a database for this template into which data from the dialogs of the intelligent template will be gradually saved (Mail Merge). It means that the entered data can be stored in this database.

Create Database

Editing Dialog Design

Here you can edit the size of the common dialog form and the size and location of the dialog elements. This common form will be used for all dialogs, however, the dialog can be edited later. If you want to insert an edit field and descriptive text or a picture, click the right mouse button in the dialog area and select the object. You can freely move the object with the mouse and change its size by dragging its drag points. This object can also be edited by double clicking it or clicking the right mouse button. To delete an object, highlight the object and click **Del.**

Select **OK** to confirm and to return to the list of dialogs. Use the button **Cancel** to cancel changes in the design.

Editing the Selected Dialog

Here you can edit the size of the dialog and size and location of the dialog elements. If you want to insert a new line and its description or picture, click the right mouse button in the dialog area and insert the object. You can freely move the object with the mouse and change its size. This object can also be edited by double clicking it or clicking the right mouse button. To delete an object, highlight the object and click **Del.**

Select **OK** to confirm and to return to the list of dialogs. Use the button **Cancel** to cancel changes in the design.

Selecting the Dialog position

Use this dialog to select the position of the new dialog and the order in which it will be displayed. Select the place to where you want to place the selected dialog and the dialog is then moved.

Use the button **Insert** to insert the dialog and confirm its placement. Click the button **Cancel** to cancel the inserted dialog.

Dialog Title

This dialog enables you to enter the title for the selected dialog. The title can include the dialog number and the total number of dialogs (e.g. Contract 1/3).

Select the option **Use** to select the title for the selected dialog.

This title can be set for all dialogs by using the option **Use For All.**

To cancel changes in the title and return to the list of dialogs, click **Cancel.**

Text Properties

This dialog enables you to enter text and select its alignment.

Click **OK** to return to the dialog. Use **Cancel** to cancel all changes in the text.

Picture Properties

This dialog enables you to set the size of the edited picture. If you want to replace the picture with another one, use **Path** to enter its location, or use the button **(…)** to select the path.

To return to the dialog, click **OK.**
To cancel changes in the design, click **Cancel.**

Input Line Properties

This dialog enables you to set the edit field characteristics, such as the initial text and the maximum number of inserted letters. You can assign a bookmark from the list of bookmarks to where the text will be sent. If you want to archive the data in the merged database, select a database field from the list.

To return to the dialog, select **OK.**
To cancel all changes in the edit field, click **Cancel.**