

Manufacturing Management Software

# **Designing Papers**

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### **Table of Contents**

#### **Document Design Tutorial**

### 5

		_
1	What is a paper design? ·····	5
2	What are the design considerations?	5
3	How do I start the paper designer?	7
4	How do I change my paper's orientation?	10
5	How do I put header information into my paper? 1	1
6	How do I put my company information into my paper?	22
7	How do I put detail information into my paper?	
8	How do I add more data lines to my paper? ······	38
9	How do I put footer information into my paper?	11
10	Use of advanced features 44	15
	10.1 Conditional printing	46
	10.2 External functions	51
11	Printing Labels 5	52
12	Printing Multiple Tables ······5	)/

#### **Document Design Tutorial**

Match-IT can generate all your business documents for you. This includes: quotation letters, purchase orders, works orders, dispatch notes, invoices and many others. Their papers are the way the information is arranged on the page together with any formatting information.

Your document designs will be very specific to your business, and often, specific to a particular product or customer as well. Match-IT recognises this and provides facilities that allow you to define as many designs as you like. Match-IT will pick the design that is appropriate to the context whenever one is required.

The purpose of this tutorial is to describe how to use the integrated paper designer to create your document designs. It is not intended to explain every tool and function of the designer; rather it aims to introduce you to enough of its features to enable you to develop an understanding of how it works and what can be achieved with it. Once you have done this, it is recommended that you examine the sample designs that came with your installation with a view to using them as a basis for your own designs.

The paper designer works in a similar way to other designers that you might have used – for example there may be one included with your accounts system (e.g. Sage Line 50 and 100). Some experience with this type of facility is assumed in this tutorial. In addition, you may need to use some of the designer's functions whose syntax is similar to those found in many spreadsheet packages; familiarity with the use of these is therefore helpful. Finally, this tutorial assumes you are familiar with the Match-IT product.

#### 1 What is a paper design?

A paper design is the set of instructions that defines how Match-IT is to create each of your printed business documents. These instructions include which pieces of information you want to include in the document, where on the page they should be printed and how they should be formatted. They can also include quite complex refinements to allow different information to be printed in different circumstances. Finally, your paper designs can incorporate fixed text, lines, boxes, graphics (e.g. logos) and – where appropriate – bar codes.

Match-IT incorporates an integrated paper designer – Combit *List & Label* – that enables you to generate these instructions visually and interactively.

#### 2 What are the design considerations?

The single design restriction placed on you is that you can only use the fields (information) that Match-IT makes available to *List & Label*. However, a very large number of such fields are available, including all the ones you are most likely to need. Beyond this, you can produce anything that *List & Label* is capable of. However, there are a few general points to note:

- An early decision you will have to make for each document type is whether you want it printed in portrait (top along the short side of the page) or landscape (top along the long side) orientation. Portrait has the advantage that more lines of detail can be printed before the document runs to more than one page. With landscape orientation the extra page width allows you to accommodate more columns of information in the detail section. While the choice is entirely yours, it is suggested that many businesses now find that landscape orientation works best for the majority of their documents.
- Most of your business documents will consist of a header area (who the document is to, when it was created, its identifying number, etc.) followed by some lines of detail (typically the parts being quoted, ordered, dispatched, invoiced, etc.). It's much easier to design your papers if you keep the header information vertically separated from the detail information.
- Match-IT provides a large number of fields (places to hold your business information), the detailed use of which is often up to you; this applies particularly to notes. When deciding what sort of information you are going to put in each of these fields, you should always be mindful of whether you will want to print it in any of your business documents. In particular, you should avoid mixing 'internal' information (intended only for use within your company) and 'external' information (intended for your customers or suppliers) in the same field.

Creating and refining your designs can be quite time-consuming. If you intend to have more than one version of each type of business document (foreign language version(s) of documents you send to your customers, for

example), you will minimise the time it takes if you get your 'master' version of each document type right before creating variants and derivatives based on that master. This is because you can use the master version as a basis for each variant; this will be much quicker than starting each one from scratch.

#### 3 How do I start the paper designer?

This topic will explain how to use *List & label* by taking you step by step through the processes involved in creating a simple example paper. It can be read alone, but is best used as a guide to actually performing the example in the system itself.

The procedure we will perform here is to create a quotation paper to send to a customer in response to an enquiry. Most of the same steps are involved in creating any other type of paper, although differences will be pointed out as we go along.

From the standard menu press Favourites | Functions | Setup | Setup | Documents |

**Report Layouts**. This will present you with a list of all the layouts. (If your menu structure is not the standard, you can also get there via *Processes*/*Go Anywhere*, then find the *Report Layouts* function in the OP group and **Execute** it.) From the layout list, select the one called **UserQuote** and press **Detail**. Select the second tab (Paper). You will be presented with a form similar to the one below.

🗎 Report Layout			🛛			
Layout <u>N</u> ame:	Quote					
<u>L</u> ayout ID:	UserQuote	JserQuote				
<u>1</u> Detail <u>2</u> Paper <u>3</u>	1 Detail 2 Paper 3 Linked To					
<u>P</u> aper:	UserQuote					
Document <u>R</u> ef:						
	Paper properties					
	Class:	Quote				
	Generator:	Match-IT				
	Driver:	UserQuote				
Pap <u>e</u> rs		✓ Can Be Edited ■ Requires name list ■ Output To File				
?	< <u>B</u> ack	Next> New Reset Del	Save Close			

Press the ... button beside the Paper field; a list of existing quotation paper designs will appear. Press **New** to reveal the form similar to the one shown below.

🖹 Make a new paper				🛛
The new paper will use this driver:	UserQuo	ote		
The new paper will be of this type:	⊙ <u>L</u> ist	◯ L <u>a</u> bel	◯ Car <u>d</u>	
<u>0</u> : Base the new paper design on this: []	UserQuo	ote		
1. Enter a unique name for your paper:				
2. Enter a descriptive name for the paper:				
Hints				
Enter the details above, then press the E You will be taken to the WYSIWYG docu the structure and content of your paper.			you can set	
?			<u>E</u> dit <u>C</u>	ancel

If we had already created a master quotation paper to use as the basis of a new version, we would enter its name in the space provided at <u>Base the new paper design on this</u>. However, in this exercise we will start from scratch, so delete whatever is now showing in this space (so that it's left blank), and press **Edit**.

This is the point at which the *List & Label* designer is started, and since we are starting from scratch, your screen should look something like that shown below:



The three tabs at the bottom of the screen – *Layout, Layout Preview* and *Preview* all show the same information about what's in your document design, but in slightly different ways. The differences are similar to the alternative views that most word processors offer: 'normal' or 'print layout', for example.

It's generally easier to design your paper using the *Layout* view, but periodically move across to the *Preview* tab to get a better idea of what the printed document will look like. The *Layout Preview* tab is intended to be the best (or worst!) of both. Press the *Layout* tab now.

Note that *List & Label* has its own help system, which is accessed in the usual Windows<sup>™</sup> manner. You can use this to learn about controls not covered in this topic, although the system's language is sometimes less than perfect and betrays the product's German origins. This *List & Label* help is entirely separate from Match-IT's own help system.

#### 4 How do I change my paper's orientation?

From the List & Label menu bar, select Project Page Setup, a form will appear as shown below.

A 10		
Standard layout	Printer settings	
	Printer Name	KONICA MINOLTA ma
	Paper Size	A4 (210 x 297 mm) (2
	Orientation	1 -
	Copies	Portrait
	Duplex	Landscape
	Force Paper Size	No
	Paper Bin	Default
	Size Adjustment	Keep scale
	Sort Copies	not specified
	Use Physical Page	Yes
	Paper Size.Orientati Paper orientation (port	

Select Landscape orientation and press OK.

#### 5 How do I put header information into my paper?

🗀 🔒 🛛	<u>S</u> elect		1. 11:11 🛄 🖅 🖉	36 183
Report structu	Insert		Te <u>x</u> t	Ctrl+T
	Arrange		Rectangle	Ctrl+R I
斷斷冒	Group	Ctrl+G	🔵 <u>E</u> llipse	Ctrl+I 22
	Ungroup	Ctrl+U	<u>L</u> ine	Ctrl+L
	Assign to Layer		🗟 Picture	Ctrl+P
	Copy to Layer		Barcode	Ctrl+B
	Contents	Enter	🔢 Report <u>C</u> ontainer	Ctrl+C
	Properties		🥃 Eormatted Text	Ctrl+F
	<u>F</u> ont		🕵 Form Control	
	Locked		😡 Form Template	1
	Object List	Num-1*1	🔯 HTML Text	
			= 🥌 OLE Container	
			Multiple Copies	

From the Objects menu, select Insert and then Text as shown below:

Using your mouse, define the position for the information by dragging the cursor from one corner of an imaginary 'box' to the diagonally opposite corner. Put the box somewhere near the top left-hand corner of the page, but don't worry exactly where – it can be moved and re-sized later.

When you release the left mouse button, you will be prompted for the information to put in the box, like this:

Variables and Functions Condi	tion Text Date Format Number Format Operato	rs
	Functions:	•
🕀 🔯 Variables		
🗄 😭 Project variables	😨 🛅 Numerical functions	
	Date functions	
	General String functions     General Misc. functions	
	Aggregate functions	
	Barcode functions     Gonversion functions	
		(m
		🗐 🖓 Insert
		(H) (H)
		((#)
		(;;;) (

You will spend much of your working time in *List & Label* with this form, so it's worth spending a few moments describing how it works.

The Variables and Functions tab is where you specify that you want to put variable information (taken from your Match-IT system) into your paper: a customer name, an order number, part numbers, for example. We will come back to this shortly.

The Text tab is where you specify that you want to put fixed text into your paper. In this context, text is words (or numbers) that will never vary when you print your document. Most of this fixed text is likely to be short prefixes to your variable information: "To:", "For the attention of:", "Signed:\_\_\_\_\_", etc.

The other tabs contain *List & Label*'s more advanced features. Don't worry about these for now – we will come back to some of them later.

For the moment, let's just put some fixed text on to our quote paper. Select the Text tab, and type the word To: into the box at the top as shown in the below.

🚾 Edit Text	×
Variables and Functions Condition Text Date Format Number Format Operators	
To:	
Image: Market state     Image: Market state       Imag	
Edit free text	Insert
	(:=) <b>()</b>
	1 ( <sup>2</sup> ) - ( <sup>2</sup> )
	OK X Cancel

Now press the **Insert** button. You will notice that the text you typed has moved into the box at the bottom of the form, as it is shown below in blue, and that *List & Label* has added quotation marks around it. The quotation marks will not appear on your printed documents – they and the blue colour are merely *List & Label*'s way of distinguishing fixed text from other types of information in your paper.

Edit Text	×
Variables and Functions Condition Text Date Format Number Format Operators	
To:	
	<u>&gt;</u>
Linefeed     Iab     Properties	
Edit free text	
	Insert
"То:"	(:=) <b>()</b>
	10 01
	<b>&gt; &gt; ?</b>
i) <sup>To:</sup>	
🛛 🗸 ок	X Cancel

Press the **OK** button. This will take you back to the paragraph properties dialog that *List & Label* opened for you when you released the mouse button while dragging earlier, as shown below:

aragraph Prope	erties				
<u>P</u> aragraphs:	📑 🔮 🗙	👗 🗈 🎦	) & 🤹	∄ 2↓ [+]	
"To:"				Appearance	
				Font	[Arial 10.0 pt]
				Format	None
				🗆 Layout	
				Alignment	Left
				Appearance Condition	Show
				Blank Optimization	Yes
				Inerasable	No
				Justified	No
				Line Spacing	0.0 pt
			3	Ine Wran	W/rap
				Appearance	
e 📑			WYSIWYG		OK X Cancel

From here, you can change its font, colour, size and other attributes using the controls provided.

Increase the text size to 11 pt, by clicking in right-hand pane of the Font property (where it says [Arial 10.0 pt] in the example above) and then clicking on the  $\boxed{}$  icon. This will open the usual  $Windows^{TM}$  font selection dialog, as shown below.

Font:	Font style:	Size:		
Arial	Regular	11	ОК	٦
O Arial Narrow O Book Antiqua O Bookman Old Style O Century Gothic	Regular Italic Bold Bold Italic	10 11 12 14 16 18 20	Cancel	5
Effects	AaBb	YyZz		
Color:	Script:			
	Western		~	

Select **11** pt and press the **OK** button twice to close the forma. Your text should now be visible in the design workspace, like this:



From the Objects menu, select Insert and then Text as before. Using your mouse, define the position for another box to the right of the existing one. The Edit Text dialog will open as before. This time, we'll enter some variable information rather than some fixed text.

The variables are gathered into groups, which are accessed, via a tree structure that you will recognise from Match-IT (and other applications e.g. *Windows*<sup>™</sup> Explorer). Press the + symbol to the left of the word Variables to open up the tree, as shown below:

Edit Text			
Variables and Functions	Condition Text	Date Format Number Format	Operators
Variables     Variables     Locals     HeaderType     Header     Header     Header     Header     Project variables		Functions:	
		Conversion functions	■ Insert (11) (11)
• • •			کر ایک Cancel

Most of the information we require for the header part of our paper is contained in the Header group, so press the + symbol to the left of the word Header to display a list of Match-IT files available for use in the quote header. The only one showing is eth (which is Match-IT's quote header file). Press the + symbol to the left of the word eth to reveal the list of variables, as shown below:

Variables and Functions	ndition Text Date Format Number Forma	at Operators
eth HeaderTex FooterTex cspExterna csrExterna PackingIns enhExtern enhEnquiry A enhSource	INotes       Invertical functions         INotes       Invertical functions         Invotes       Invertical functions	
		(;;;) (;;;)
<b>i</b> )		(j) (

The symbol to the left of each variable name represents the type of information that the variable comprises, as shown below:

Formatted text - RTF

\Lambda Plain text

- Logical (i.e. only has yes/true or no/false values)
- Mumber

If you are familiar with spreadsheet or database programs, you might expect date information to be a fourth type. However, Match-IT dates are all passed to *List & Label* as text; this means that you cannot use *List & Label*'s date formatting functions to format dates passed from Match-IT. (However, you can use *List & Label* functions to take text apart and put it back together again in a different order – see Use of advanced features.)

The first three letters of each variable name is Match-IT's internal code for the data file holding the information. The remainder is Match-IT's internal name for the variable itself. You will be able to recognise many of these names: for example, enhEnquiry (which we can see is a number) is the unique number Match-IT assigns automatically to each of your enquiries; enhSource (which we see is text) is the enquiry source which appears on the Addr/Notes tab of Match-IT's enquiry form. You will also notice that when a variable is highlighted, a brief description is shown in the area below the variable list. If there are any names that you are unable to recognise, a more detailed list is provided in the reference section of the on-line help.

Scroll down the list of variables until you find cshName which is the customer's full name. Click on cshName and press the **Insert** button. As with the fixed text we entered before, you will see that it has been placed in the box at the bottom of the form. The brown colour indicates that *List & Label* recognises it as a variable.

-	Condition Text Date Format Number Format O	operators
	Functions:	
Customer full name	bhone Understand	
Header.eth.cshName		(#) (
		(*)

Press **OK**, increase the text size to 11 pt in the <u>Text Properties</u> form, and press the **OK** button again to close the form. Your design workspace should now look something like:



After all this work, you now have a paper that will print To: Joe Bloggs Limited if you were to produce a quote to a customer of that name.

You might find that Joe Bloggs Limited doesn't fit in the space you have allowed for it (as defined by the rectangle shown above); this would cause it to truncate (i.e. it might print as To: Joe Bloggs Limi). To prevent this, enlarge the box by clicking the re-sizing handle on the right-hand side of the rectangle, and

dragging to the right.

You are also likely to find it difficult to exactly line up the TO: with the customer name; *List & Label* can help you with this. From the **Project** menu, select **Options...** to display this form:

Workspace	Compatibility	Formula Wizard
Project	Objects	Preview
	00)000	TICHOW
rid		
Show <u>G</u> rid		
✓Snap to grid (Ctrl	+N)	
2.00	orizontal	
2.00	ertical	
horiz./vertical syr	nchronized	
ecimals		
Precision:		2
This value is used for into strings	r the automatic convers	sion of numerical values
able of Contents (PD	F and preview)	
maximum dep <u>t</u> h:		2

Click the <u>Snap to Grid</u> check box to enter a tick, make the grid a suitable size as shown above, and press **OK**. You will now find that when you re-size any item in your paper it jumps to the nearest grid position; this will help you line up the various elements of your paper.

If the elements on your paper look rather small, you can view them at a larger scale by pressing the View menu, and selecting 2 Times, 4 Times or 8 Times magnification. Note that this does not change the paper itself – you are merely looking at it though a magnifying glass. This is similar to the Zoom facility in many word processors.

View ?		1									
Eull	Alt+1	:1	🐫 😭	3				E F	昭 麗	0 3	
✓ 2 Times	Alt+2	IT.	0	10	20	30	40	50	60	70	80
<u>4</u> Times	Alt+3	H	•						nuluuu		
<u>8</u> Times	Alt+4		`= VA	<i>16,49</i> ,	a a a a a a a a a a a a a a a a a a a	4444	934 <u>7</u>	CH A	<u>ie de la comp</u>	77 <u>77</u> 7	77
<ul> <li>Layout</li> <li>Layout Preview</li> <li>Preview</li> </ul>		Ę									
<u>W</u> indows	•	30 20			<u> </u> 'Tc				shNa		

Creating the rest of the header section of our quote paper is just a matter of continuing to add fixed text and variables in this way.

In the illustration below, the customer's address has been added below the name. Because addresses contain several lines of text, the rectangle defining its position has been made deep enough to show all these lines. If you find that some of your customer address lines are not appearing in your printed documents, you can increase the space allocated by dragging the resizing handles as described above.

Match-IT allows a separate delivery name and address to be specified for the goods being quoted for, and these have also been added as shown:



In this example, we have come to the point where we want to print a page number in case the quotations run to more than one page. Page numbers on the printed document are not governed by Match-IT – there is no variable for this. Instead, *List & Label* can itself generate page numbers, and you can place them in your paper by means of a *function*.

Proceed as if you were going to place a variable in your paper, but when you get to the Edit Text screen, press the + sign to the left of the Project and Print dependent functions on the right hand side in the box labelled Functions:. Click on the function called Page\$() as shown in the illustration below. *List & Label* indicates to you the purpose of the function that you have selected in the box below the function list.

Variables and Functions Condition	on Text Date Format Number Format Operators	
eth HeaderText FooterText cspExternalNote csrExternalNote PackingInstruction enhExternalNote enhExternalNote enhExternalNote	s Lastpage () ons Page ()	
Current page as string.		Insert (☆) ()
		(j) (j

Press **Insert**, then **OK** and **OK** again to return to the design workspace; the page number will now be printed on your quotations. In a similar way, you might like to use the **TotalPages**() function to print the total pages of the document along with the current page (e.g. "Page 1 of 2").

#### 6 How do I put my company information into my paper?

Proceed as if you were going to place a variable in your paper, but when you get to the Edit Text screen, press the + sign to the left of the Locals category to reveal a list of company information, as shown below:

Edit Text	X
Variables and Functions Condition Text Date Format Number Format Operators	
Functions:	
Image: SelfAddr1Line         Image: SelfAddr1Line	
	The Insert
	(:=) <b>()</b>
<b>↓</b>	(2) - Çi
🕐 ок	Cancel

These variables are taken from the *Reports Layout* defaults (class *ol*) in your Match-IT system, so if you change any of these default values you will also change all the printed documents in which they appear. You will find that the **Locals** variables are available for use in all types of paper, not just the quotation category we are working through in this example.

To insert your company name on your quotations, select SelfName from the list. Press **Insert**, then **OK**. In the **Text Properties** form, increase the text size to 20 pt and select your corporate colour; then press **OK** again to return to the design workspace. If you click on the preview tab, you will see your own company name in a similar way to the illustration below:



Note that you can change the colour of any item in your paper, but of course this will only be effective if you print the final document on a colour printer, or send it electronically.

Continue to add other company information to your paper as you wish: your address, telephone, fax and email for example.

#### 7 How do I put detail information into my paper?

The detail lines of your papers will normally comprise the parts that you are quoting, selling, making, buying dispatching or invoicing. You enter these into your paper by means of a table, which is a type of *report container* in *List & Label* terminology.

From the Objects menu, select Insert and then Report Container as shown below:



Using your mouse, define the position and size for the table area by dragging the cursor from one corner of an imaginary 'box' to the diagonally opposite corner. Make the box the whole width of your page below your header information, but don't worry exactly where – it can be moved and re-sized later.

When you release the left mouse button, a dialog will appear asking you which type of container you want. Only the Table type is usable in Match-IT, so make sure you select the table option as shown below:

Choose (	Object Type	×
	the object type that you want to insert into the Container:	
	⊙Iable	
	⊖⊆rosstab	
	○C <u>h</u> art	
<b>?</b>	🖌 OK 🔀 Cancel	

Press **OK**. Next *List & Label* will ask you where the information for the table is to come from. A form like the one below will be shown:

🔲 Choose Source Table Pa	th	8
Please choose the source tab	le here:	
Free content Header Line [Header2Line]		
	🖌 ок	Cancel

What you see in this form will depend on the type of document you are creating. It shows a view of all the information available and how they are related. In the quote example you will see a Header table and below it a Line table. Notice the Line table is indented, this indicates it is a 'child' of the Header table. This means for every Header there can be any number (including none) of attached Lines, i.e. for every quote there can be any number of quote lines - just as you would expect. A single level like this is the simplest case, you will find other documents with much more complex structures, in Match-IT the most complex is the works order, containing 18 tables.

Select the Line [Header2Line] entry and press OK.

Next, a form will be shown to allow you to pre-select fields. This is a tool that is described in more detail in the *List & Label* manual. Will not use it here, press **OK** then **OK** again. You should now see an outline of your table similar to the one below:



Double-click anywhere inside the table area to open the Table Contents form, and select the tab labelled Data Line as shown below:

Table Contents - Line [Header2Line]		×
Header Line Data Line Footer Line Group Hea	ader Group Footer	
🌠 📑 • 😹 🗙 👗 🖷 🛅 🌾	4, 📳 ĝ↓ [+]	
	🗆 Design	
·····	Display in Designer	Show
	Name	
	Appearance	
	Default Font	[Arial 10.0 pt]
	🗆 Layout	
	Appearance Condition	Show
	Ignore Empty Line	Yes
		0
		[0.00, 0.00, 0.00, 0.00 mm]
	Design	
	Image: A start of the start	OK X Cancel

This is where you specify the columns of your detail lines, and when creating your own papers you will need to decide on these before you go any further.

In this example, let's assume we want to have 7 columns of information for the items we are quoting to our customers, as follows:

- Line Item Reference
- Our Part Number
- Customer's Part Number
- Description
- Quantity
- Quoted Price
- Quoted Delivery Date

To specify these columns, click the *append column* icon: **C**. This opens the **Edit Table** form as shown below:

C Edit Table		6
Variables and Functions Condition	Text Date Format Number Format Operators	
	Functions:	
⊕ 🔯 Variables		~
😟 😭 Project variables	Project and print dependent functions	
- <mark>A</mark> DetailType ⊕ - <u>C</u> Line	Continued ()	
	🗭 Page ()	
	PreviousUsed ({All})	<b>x</b>
		E: Insert
		(t#) <b>()</b>
4		(1) (1) (1)
<b>i</b> )		
2	✓ OI	Cancel

You should immediately recognise this form as being almost identical to the Edit Text form that we used earlier for our header text and variables, and indeed it operates in the same way. The difference is that we now have a group of Fields in the Variables and Functions section, as shown above.

Most of the information we require for the detail part of our paper is contained in the Fields group, so press the + symbol to the left of the word Fields, and then Line to display the Match-IT files available for use in quotation lines. etq is Match-IT's quote line file, and you will also notice that a Qualifiers group may also be present; all qualifiers relating to your products can be included in your printed documents by adding them to your papers. The Qualifiers section will only appear if you have created appropriate qualifiers. See Setting up qualifiers for how to do that.

Scroll down the list of fields until you find LineItemReference. This is to be the first (i.e. left-hand) column

in our details section, so select it and press the **Insert** button, then **OK** to return to the **Table** Contents form.

The Table Contents form should now appear as shown below:

able Contents - Line [Header2Line] Header Line Data Line Footer Line Group Head	der Group Footer	
🌠 🖆 • 😭 🗙 👗 🖻 🖆 👘 🧃	₽ ₽ [+]	
🖃 🧰 Line Definition 1	Design Name	
	🗉 Data	
	(Contents)	Line.etq.LineItemRe
	Options	
	Appearance	
	Background	Transparent
	Export as Picture	No
	Font	[Arial 10.0 pt]
	Format	None
	Rotation	0°
	Text Format	Normal Text
	Action	
	Link URL	
	Design	
Customer reference for the line item		
a 📑		
		OK X Cancel

Notice that a number of properties are shown in the area on the right hand side of the form; these enable you to format the column and its contents (i.e. the LineItemReference). If you select (click on) each of these properties in turn, an appropriate editing facility will be displayed in the right hand half of the property which enables you to change the value of the property. In the illustration shown below, the width of the column has initially been set to 30mm, but you can change this using the control provided.

eader Line 🛛 Data Line 📕 Footer Line 🗍 Group Header	Group Footer	
	Text Format	Normal Text
Line Definition 1	Action	
Ine.etq.LineItemReference	Link URL	
	E Layout	
	Alignment	Left
	Appearance Conditi	ion Show
	Blank Optimization	Yes
	Fit	Wrap
	Fixed Height	not defined
	Justified	No
	Line Spacing	0.0 pt
	Vert. Alignment	top
	Width	30.00
	Width	
Customer reference for the line item	Width.	

By clicking the *append column* icon: Add in turn the remaining 6 columns in the same way. If you've managed to find the right variables from the list, your Table Contents form should then look as shown below:

🎉 📑 • 🕋 🗙 👗 🗎 🖆 🔹	₽ 2↓ [+]		0
-	Text Format	Normal Text	E
	Action		
Line.etq.LineItemReference	Link URL		
	🗆 Layout		
Line.etq.mchName		Left	
Line.etq.FormattedQty     Line.etq.enqUnitPrice	Appearance Condition	Show	Show Yes Wrap not defined No 0.0 pt
	Blank Optimization	Yes	
		Wrap	
	Fixed Height	not defined	
	Frame		
	Justified	No	
	Line Spacing	0.0 pt	
	Vert. Alignment	top	
	Width	30.00 mm	
	Width		
[LL_date]The date delivery is required on	Width.		

Press **OK** to close the form, your design workspace should look as shown below:



You will notice that at the moment our 7 columns do not take up the full width of the table we have defined. This is just as well, because some columns may need more than the 30mm width that *List & Label* has initially allocated. For example, the *Description* column mchName will almost certainly need more space.

There are two ways to adjust the width of each of your columns: you can activate the Data Line tab on the Table Contents form, select the column you want to alter and specify its width in millimetres.

Alternatively, you can do it interactively by placing your mouse cursor over the column boundaries and dragging them to the positions you require. As you move the mouse over a column boundary, you will see the cursor changes to the usual *Windows*<sup>™</sup> column re-size icon, just drag that boundary to where you want it.

When you have increased the width of the Description column, you should have something like this:



When you are creating your own papers, you will probably have to use a certain amount of trial and error to optimise your column widths: too wide and you are wasting precious page width; too narrow and the contents of your columns will be truncated.

If it proves very difficult to prevent the contents of your columns being truncated, you can tell *List & Label* to wrap onto a second (and subsequent) line. To do this, select the column you want to be wrapped, and change the Fit property from Truncate to Wrap as shown in the illustration below:

© 2013 Match-IT Limited

leader Line    Data Line    Footer Line    Group Head	er Group Footer		0
	Text Format	Normal Text	•
E C Line Definition 1	Action		1
Line.etq.LineItemReference	Link URL		
A Line.etq.engTheirPartNum	🗆 Layout		Ľ.
Line.etg.mchName	Alignment	Left	
Line.etq.FormattedQty	Appearance Condition	Show	
	Blank Optimization	Yes	-8
Line.etq.enqDelBy	Fit	1 -	]
	Fixed Height	Truncate	ĺ
	Frame	Wrap	
	Justified	Shrink	
	Line Spacing	Compress	
	Vert. Alignment	Formula	
	Width	99.00 mm	
Our material long name	Fit Sets the behavior if the tex	t is too long for one line.	

We now need to add some headings to the columns of detail lines so that our customers know exactly what each column is. To do this, select the Header Line tab on the Table Contents form. You will be presented with this form:

Choose a Table Line Definition	8
The row you are trying to edit is empty. F the definition of another row or start the	Please choose whether you want to use field selection wizard.
<ul> <li>Empty line</li> <li>Start field selection wizard</li> <li>Choose existing line</li> <li>Data Line</li> <li>Line Definition 1</li> </ul>	
	V OK X Cancel

*List & Label* is asking you whether you want it to create column headings to match the details we have just specified. It's easiest if we do this, so select Line Definition 1 and press **OK**. *List & Label* will then create headings with the same column widths as your detail lines, as shown in the illustration below:

eader Line 🛛 Data Line 🗍 Footer Line 🗍 Group Header	Group Footer	(0
Line Definition 1 "enqOurPartNum" "enqTheirPartNum" "mchName" "FormattedQty" "enqUnitPrice" "enqDelBy"	<ul> <li>Design         <ul> <li>Display in Designer</li> <li>Name</li> </ul> </li> <li>Appearance</li> <li>Default Font</li> <li>Layout         <ul> <li>Appearance Condition</li> <li>Ignore Empty Line</li> <li>Outline level</li> <li>Spacing</li> </ul> </li> </ul>	Show [Arial 10.0 pt] Show Yes 0 [0.00, 0.00, 0.00, 0.00 mm]
	Design	

You will notice that *List & Label* has used Match-IT's field names for the column heading names, but we can change these into something more meaningful. Double-click on each heading name in turn and edit the text to something of your choice, as shown in the illustration below. You may also want to centre-align the column headings as shown.

🌠 🖆 • 😭 🗙 👗 🖻 🖆 🖉 🗣	_	oup Footer		
		Text Format	Normal Text	
	E	Action		
Item No"		Link URL		
"engTheirPartNum"	E	Layout		
	Œ	] Alignment	0	•
		Appearance Condition	Left	
"enqUnitPrice"     A "enqDelBy"		Blank Optimization	Centered	
A "enqDelBy"	E	] Fit	Right	
		Fixed Height	Decimal	
	Œ	] Frame	Formula	
		Justified	No	
		Line Spacing	0.0 pt	
	-	Vert. Alignment	top	
		Width	30.00 mm	
		<b>ignment</b> ×t alignment.		

When you have given all the column headings meaningful names, press **OK** to return to the design workspace and select the **Preview** tab. Your paper should look similar to that shown below:

	- AlxAI   🖏 😭   🗄						6
0		50 ' i i l i i 7		100 150   	200		<b>.</b>
- 6	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	<u> </u>	23232322		24444444	9292222	222222222
- 22	· · · · · · · · · · · · · · · · · · ·						
182				Your Company Name			
- 12							
- 12	To: eth:c	shName	Delin	ver To: eth:cscDelivervName Date: 9/0	04/09		
- 62	eth:c	shAddress	CLELLLIIIIIII CLELLLIIIIIIII CLELLLIIIIIIIII	eth:cscDeliveryAddress Page: 1			
- 44		\$\$\$\$\$\$\$\$\$\$\$\$	CCCCCCCCC	\$			
- 18		•••••••	φφφφφφα	•••••••••••••••••••••••••••••••••••••••			
	,φφφ 	****					
		<b>ΦΦΦΦΦΦΦΦΦΦΦΦΦΦΦ</b> Φ	ηση φαρά του τ				
				00000000000000000000000000000000000000			
	Item No.	OurPart No	Your Part No.	Description	Quartity	Unit Price	Delivery
	tem No	Our Part No etgengOurPartNur	Your Part No. etgengTheiiPartNu	Description Description	Quantity etc:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$	etq:enqUnitPrice	Delivery 9/04/09
	Item No etq Lineltern Referei \$\$\$\$\$\$\$ etq Lineltern Referei	Our Part No etgenqOuPartNur \$\$\$\$\$\$\$\$\$\$\$\$ etgenqOuPartNur	Your Part No. etg engTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$ etg engTheirPartNu	Description etq.mchName \$	etq:FormattedGty \$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedGty	etq:enqUnitPrice \$\$\$\$\$\$\$ etq:enqUnitPrice	
	Item No etqLineltenReferei \$\$\$\$\$\$\$\$ etqLineltenReferei \$\$\$\$\$\$\$\$ etqLineltenReferei etqLineltenReferei	Our Part No etgengOuPartNur \$\$\$\$\$\$\$\$\$\$\$ etgengOuPartNur \$\$\$\$\$\$\$\$\$\$\$\$\$	Your Part No etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$	Description Etg:mchName \$	etq:FormattedQty \$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedQty \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedQty	etq:enqUnitPrice \$\$\$\$\$\$\$ etq:enqUnitPrice \$\$\$\$\$\$\$ etq:enqUnitPrice	9/04/09
	teqLinetemReferei \$\$\$\$\$\$\$5 etqLinetemReferei \$\$\$\$\$\$\$ etqLinetemReferei \$\$\$\$\$\$\$\$	Our Part No etgengOuPartNur \$\$\$\$\$\$\$\$\$\$\$\$ etgengOuPartNur \$\$\$\$\$\$\$\$\$\$\$ etgengOuPatNus \$\$\$\$\$\$\$\$\$\$\$\$	Your Part No etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$	Description etq.mchName \$	etq:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$\$\$	etg:enqUnitPrice \$\$\$\$\$\$ etg:enqUnitPrice \$\$\$\$\$\$ etg:enqUnitPrice \$\$\$\$\$\$	9/04/09 9/04/09 9/04/09
	Item No edu Lireltem Refere \$\$\$\$\$\$\$ edu Lireltem Refere \$\$\$\$\$\$\$ edu Lireltem Refere \$\$\$\$\$\$\$ edu Lireltem Refere \$\$\$\$\$\$\$	OurPart No EtherapQUP artNur \$\$\$\$\$\$\$\$\$\$\$\$\$ etherapQUP artNur \$\$\$\$\$\$\$\$\$\$\$\$\$ etherapQUP artNur \$\$\$\$\$\$\$\$\$\$\$\$\$ etherapQUP artNur \$\$\$\$\$\$\$\$\$\$	Your Part No dq enqTheiP artNu \$\$\$\$\$\$\$\$\$\$\$\$ dq enqTheiP artNu \$\$\$\$\$\$\$\$\$\$\$\$ dq enqTheiP artNu \$\$\$\$\$\$\$\$\$\$\$\$\$ dq enqTheiP artNu	Description etq mchName \$	etq:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCty \$\$\$\$\$\$\$\$\$\$\$\$\$\$	etg engUnitPrice \$\$\$\$\$\$ etg engUnitPrice \$\$\$\$\$\$ etg engUnitPrice \$\$\$\$\$\$ etg engUnitPrice	9/04/09 9/04/09 9/04/09 9/04/09
	Item No etqLineitem Referer \$\$\$\$\$\$\$\$ etqLineitem Referer \$\$\$\$\$\$\$ etqLineitem Referer \$\$\$\$\$\$\$ etqLineitem Referer \$\$\$\$\$\$\$	Our Part No. etgençOuPartNur \$\$\$\$\$\$\$\$\$\$\$\$ etgençOuPartNur \$\$\$\$\$\$\$\$\$\$\$\$\$ etgençOuPartNur \$\$\$\$\$\$\$\$\$\$\$\$ etgençOuPartNur \$\$\$\$\$\$\$\$\$\$	Your Part No etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etgengTheirPartNu	Description           etq.mchName         Description           \$\$155555555555555555555555555555555555	etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$ \$\$\$\$\$\$\$\$\$\$ \$\$\$\$\$\$\$\$\$ etq:FormattedCity etq:FormattedCity etq:FormattedCity	etg engUnitPrice \$\$\$\$\$\$\$ etg engUnitPrice \$\$\$\$\$\$\$ etg engUnitPrice \$\$\$\$\$\$\$ etg engUnitPrice \$\$\$\$\$\$\$ etg engUnitPrice \$\$\$\$\$\$\$ etg engUnitPrice	9/04/09 9/04/09 9/04/09
	Item No           dtQLineltemReferen           \$\$\$\$\$\$\$\$\$\$           dtQLineltemReferen           \$\$\$\$\$\$\$\$\$\$           dtQLineltemReferen           \$\$\$\$\$\$\$\$\$\$           dtQLineltemReferen           \$\$\$\$\$\$\$\$\$\$\$\$\$           dtQLineltemReferen           \$	Our P at No Our P at No ethernOUP atNur \$\$\$\$\$\$\$\$\$\$\$\$\$ ethernOUP atNur \$\$\$\$\$\$\$\$\$\$\$\$\$ ethernOUP atNur \$\$\$\$\$\$\$\$\$\$\$\$\$\$ ethernOUP atNur \$\$\$\$\$\$\$\$\$\$\$\$\$\$ ethernOUP atNur \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$ ethernOUP atNur \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$ ethernOUP atNur	Your Part No dq eng TheilP at Nu \$\$\$\$\$\$\$\$\$\$\$\$ dq eng TheilP at Nu \$\$\$\$\$\$\$\$\$\$\$\$\$\$ dq eng TheilP at Nu \$\$\$\$\$\$\$\$\$\$\$\$\$\$ dq eng TheilP at Nu \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$ dq eng TheilP at Nu \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$	Description etq mchName \$	etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$\$\$ etq:FormattedCity \$\$\$\$\$\$\$\$\$\$\$\$\$	etq:enqUnitPrice \$\$\$\$\$\$5 etq:enqUnitPrice \$\$\$\$\$\$5 etq:enqUnitPrice \$\$\$\$\$\$5 etq:enqUnitPrice \$\$\$\$\$\$\$ etq:enqUnitPrice \$\$\$\$\$\$\$ etq:enqUnitPrice \$\$\$\$\$\$\$	9/04/09 9/04/09 9/04/09 9/04/09

You will notice that the columns are all separated by vertical borders, and also that the items on your quotation are separated by horizontal lines. However, you can control whether these borders appear.

To do this, right-click in the table area and select **Properties** from the menu shown. A list of properties for the table will be shown to the lower left of the design area, like this:

•-	₽↓ [+]	
Ξ	Design	
	Name	l l
	Separator Ticks	True
Ξ	Data	
	Filter	True
	Source Table Path	Line
	Appearance	
	Default Frame	
	Layout	[Horiz. Priorit <sup>,</sup>
	⊕ Left	
	<b>⊞</b> Тор	
	🕀 Right	
	Bottom	
Ξ	Fixed Size	No
	Separators Fixed	No
Ξ	Layout	
	Appearance Condi	Show
ŧ	Column Count	(Default)
	Distance Before	0.00 mm
_	sign	

Scroll down and select the Default Frame property, then press the 🛄 button that appears. The form shown below appears:

rame Properties	8
Presets	Line
No frames Outline	<u>T</u> ype:
Frames and distances to the content (unit: mm):	
0.50	
1.00	
	<u>C</u> olor: 32: ■ ✓
0.50 🗘 🥅 🛄	<u>W</u> idth (mm): 0.00
To apply the chosen line type, select one of the presets, click the lines in	the preview or use the buttons.
?	OK 🗙 Cancel
To remove the border lines, click on the line you want to remove, it disappears. Click again, it comes back. Press **OK** when you are done. Note: You are editing the default frame for all lines in the table, so it will affect the header lines too (i.e. the column titles). You can put them back on those by editing the frame for the individual column titles. To do that, double-click on one of the column titles so that the **Table Contents** 

form shows with your column title selected. Then select the **Frame** property, press the **...** button that appears and the same frame form as shown above will appear. But, this time only the column selected is being affected.

## 8 How do I add more data lines to my paper?

Despite your best efforts to optimise column widths, wrap text, etc. you may still find that you need to print more information in some of your business documents than there appears to be space for. If you had this problem on a manual system, you would probably solve it by putting more information into one or more of the existing columns underneath what is already there. This is also possible with *List & Label*.

Double-click on the table to open the Table Contents form, select the Data Line tab, select the Line Definition 1 folder and press the is icon. This will open a dialog to allow you to create another line, as shown below. Note: The is icon must be selected when the Line Definition 1 folder icon is selected, otherwise you'll get the dialog to add another column to the existing line rather than that to add a whole new line.

Choose a Table Line Definition 🛛 🛛 🔀
The row you are trying to edit is empty. Please choose whether you want to use the definition of another row or start the field selection wizard.
<ul> <li>Empty line</li> <li>Start field selection wizard</li> <li>Choose existing line</li> <li>Header Line</li> <li>Line Definition 1</li> <li>Data Line</li> <li>Line Definition 1</li> </ul>
Cancel

*List & Label* is asking you whether you want it to create a second data line to match the column headings or data line we have already entered. It's easiest if we do this, so press OK. *List & Label* will then create a second row of data which is identical to your first detail line, as shown in the illustration below:

e Contents - Line [Header2Line]		
Header Line Footer Line Group Header	Group Footer	
% <b>8</b> • & X <b>X 0 0 1</b> • ↓	A↓ [+]	()
	🗆 Design	
	Display in Designer	Show
Line.etq.LineItemReference	Name	
	Appearance	
Line.etq.mchName	Default Font	[Arial 10.0 pt]
Line.etq.FormattedQty	🗆 Layout	
	Appearance Condition	Show
Line.etq.enqDelBy	Ignore Empty Line	Yes
Line Definition 2     A Line.etg.LineItemReference	Outline level	0
A Line.etg.engOurPartNum		[0.00, 0.00, 0.00, 0.00 mm]
Line.etq.enqTheirPartNum		
Line.etq.mchName		
Line.etq.FormattedQty		
Line, etq. enqDelBy		
	Design	
D 🕞	Image: A start of the start	OK X Cancel

*List & Label* will give your new line the name Line Definition 2, but you can rename these lines to anything that is meaningful to you. Right-click on the Line Definition 2 line and select the Rename Line Definition item as shown below:

Insert Table Line	
Append Table Line	
Rename Line Definition	
Insert Column	
Append Column	
Select All	
Collapse all Line Definitions	
Cut	
Сору	
Insert	
Delete	

We now need to specify the information we require in this second line of data. In our example, only the Description column (which is the fourth one) is to have extra information. Double-click on each of the other columns in turn and replace what is there with blank text. Then double-click on column 4 and replace the contents with some text – Drawing No:, – a plus sign and then the field called mchDrawingRef. Press **OK** to return to the Table Contents form, which should now look as shown below:

leader Line 🛛 Data Line 🗍 Footer Line 🗍 Group Hea	der Group Footer	
Ene Definition 1	Design Name	
Line.etq.LineItemReference	Data (Contents)	"Drawing No:"+Line
Line.etq.mchName	Options	
Line.etq.enqUnitPrice	Background     Export as Picture	Transparent
ie- imition 2		[Arial 10.0 pt]
	Rotation	0°
	Text Format	Normal Text
	) Design	

A second line showing the drawing number will now be printed underneath the part name in the Description column of our quotations.

Press **OK** to return to the design workspace, which now appears as shown below:

Bit In the ader eth. cshName       IDeliver Tol Header.eth.cscDelivervName       IDate." Header.eth.eshDoud         Header.eth.cshAddress       IDeliver Tol Header.eth.cscDelivervAddres       IDate." Header.eth.eshDoud         Image: Pages 0       Image: Pages 0         Image: Tem.Not       "Our Part Not" "Your Part Not" "Description"       "Quantity." Unit Price" "Delivery"	0     	) 	100 <del>.</del>	150	200 <del>.</del> <del>.</del>	250 1	<b>. . .</b>
Beader.eth.cshAddress     Header.eth.cscDellweryAddres     IPages: Pages 0	-		Loc	als.SelfNam	ne		
" " " " " " " " " " " " " " " " " " "	50		TTTTTTTTTTTTTTTTTTTTTTTTTTTTTT				
- Une sta LindtemRr Line.sta snaQurPar Une sta snaQurPar Une sta sna TheirPr Line.sta sna Delta sna	-			"Description"	"Quantity"	"Unit Price"	"Delivery"

08 July 2013

# 9 How do I put footer information into my paper?

Match-IT provides a notes field for recording any information about the enquiry as a whole, and you may wish to print this at the bottom of your quotation after the list of items being quoted. (Similar fields exist for each of your main business documents: sales orders, purchase orders, works orders, despatch notes, invoices, etc., and you may want to do the same thing with these documents.)

To do this, double-click on the table to open the Table Contents form, then select the Footer Line tab. You will be presented with the Choose a Table Line Definition form as shown below:

Choose a Table Line Definition
The row you are trying to edit is empty. Please choose whether you want to use the definition of another row or start the field selection wizard.
<ul> <li>Empty line</li> <li>Start field selection wizard</li> <li>Choose existing line</li> <li>Header Line</li> <li>Line Definition 1</li> <li>Data Line</li> <li>Line Definition 1</li> <li>Line Definition 2</li> </ul>
Cancel

List & Label is asking you whether you want it to create footer entries to match the columns in our detail area. We don't want to do this, so select Empty line and press **OK**. The Table Contents form should now look like this:

leader Line Data Line Footer Line Group I	Header Group Footer	
🌠 📑 • 😹 🗙 👗 🖻 🛅 🔗		0
	🗆 Design	
Line Definition 1 (empty)	Display in Designer	Show
	Name	
	Appearance	
	Default Font	[Arial 10.0 pt]
	🗆 Layout	
	Appearance Condition	Show
	Ignore Empty Line	Yes
		0
		[0.00, 0.00, 0.00, 0.00 mm]
	Design	
		OK X Cancel

Footer information is entered in the same way as all other data in the table. The notes for the quotation as a whole are called **enhExternalNotes**; do not be confused by the fact that they are in the Header group of variables as shown below! (In this context Header simply means information relating to the quotation as a whole, rather than the individual items being quoted.)

Variables and Functions Condition	Text Date Format Number Format Operators	
teh HeaderText FooterText cspExternalNotes csrExternalNotes PackingInstructions enhExternalNotes # enhEnquiry Image: Start and the sector of the sector o	Functions:	E Insert
Header.eth.enhExternalNotes		(#) (
eth:enhExternalNotes (The extern	al notes for this quote) \$	▶ <b>&gt;</b> (

Press **OK**, increase the width of the column to that of the whole table, and change the **Fit** property to **Wrap** to enable your notes to extend to more than one line, as shown below:

<ul> <li>□ Line Definition 1</li> <li>□ A Header.eth.enhExternalNotes</li> <li>□</li> <li>□</li> </ul>	A t + 1 Text Format Action Link URL Layout Alignment Appearance Condition Blank Optimization Fit	Normal Text
Header.eth.enhExternalNotes	Link URL Layout Alignment Appearance Condition Blank Optimization	Show
	Alignment Appearance Condition Blank Optimization	Show
	Appearance Condition Blank Optimization	Show
	Blank Optimization	
		Yes
	Fit	
		Wrap
	Fixed Height	not defined
E	Frame	
	Justified	No
	Line Spacing	0.0 pt
	Vert. Alignment	top
	Width	278.00 🧖 🗏
Wie		( <u> </u>
The external notes for this quote Wid	Jth.	

Press **OK** again to return to the design workspace, which should now appear as shown at the bottom of the next page.



# 10 Use of advanced features

This section covers a few more advanced features available.

## **10.1** Conditional printing

Up until now, this user tutorial has guided you through the basic processes that most of your business papers will require. However, *List & Label* also has a number of capabilities that enable you to incorporate more complex requirements into your papers.

Most useful of these advanced features is the conditional expression. In the context of your business documents, this is saying: "if a field (piece of information) is equal to something, then print one thing; otherwise print something else". For example, in the quotation paper we have created throughout this tutorial, we could change the delivery address in the header section such that if no separate delivery address were specified for an enquiry, the quotation document would say "As Quote Address" instead of being left blank.

To do this, double click on the delivery address area in the paper, and then double-click again on the Header.eth.cscDeliveryAddress of the Paragraph Properties form. Click on the tab labelled Condition to reveal the form shown below:

🚾 Edit Text	8
Variables and Functions Condition Text Date Format Number Format Operators	1 
Condition	√α Edit
Expression if condition is True	 √α Edit
Expression if condition is False	<u>√α</u> Edit
	Insert
	<u>Prote</u>
	(=) (=)
٩	<b>)</b>
	Cancel

*List & Label* helps you build up conditional expressions so that you don't have to worry too much about the syntax. First of all, delete the <u>Header.eth.cscDeliveryAddress</u> from the bottom box so that we can start again.

The condition we need to test for is whether the delivery address is blank. Press the **Edit...** button beside the <u>Condition</u> box to open another almost identical form. Select the delivery address from the list of variables in the usual way, and press **Insert**. Then add an equal sign, which you can either type in directly to the bottom box, or select from the <u>Operators</u> tab, select = and press **Insert**. To enter a 'blank', go to the <u>Text</u> tab and just press **Insert**, or type in two double quotation marks yourself. Your form should appear as shown below:

Press **OK** to return to the condition form which will be as shown below:

dit Text	
Variables and Functions Condition Text Date Format Number Format Operat	tors
Condition-	
Header.eth.cscDeliveryAddress = ""	<u>γ</u> α Edit
Expression if condition is True	
	<b>√α</b> Edit
Expression if condition is False	
	vα Edit
	🔤 Insert
	(;=;) (=
	<u>ه</u> (۲
į)	
	OK X Cancel

The first part of our conditional expression is now in place.

The second stage is to specify what we want to print if the condition is true – that is, if there is no delivery address. Press the **Edit...** button beside the **Expression** if condition is **TRUE** box, select the **Text** tab and type As **Quote** Address, then press **Insert** and **OK** to return to the condition form. This completes the second part of the conditional expression.

You can probably guess what you need to do now: press the **Edit**... button beside the **Expression** if **condition** is **FALSE** box, select the **Variables** and **Functions** tab and select the delivery address from the list of variables in the usual way. Then press **Insert** and **OK** to return to the condition form. This completes the third and final part of the conditional expression, and the condition form will be as shown below:

🚾 Edit Text	8
Variables and Functions Condition Text Date Format Number Format Operators	
Condition	
Header.eth.cscDeliveryAddress = ""	√α Edit
Expression if condition is True	
"As Quote Address"	Vα Edit
Expression if condition is False	
Header.eth.cscDeliveryAddress	Vα Edit
	Insert
	(=) ()
	्र 🖌
<b>i</b> )	
😥 🗸 ок	Cancel

If you now press the **Insert** button, *List & Label* will build the conditional expression automatically from the three elements you have provided, as shown below:

🚾 Edit Text	8
Variables and Functions Condition Text Date Format Number Format Operators	
Condition	
Header.eth.cscDeliveryAddress = ""	vα Edit
Expression if condition is True	
"As Quote Address"	Vα Edit
Expression if condition is False	
Header.eth.cscDeliveryAddress	vα Edit
	🕵 Insert
Cond(Header.eth.cscDeliveryAddress = "", "As Quote Address", Header.eth.cscDeliveryAd	ldress) ()
<	<b>)</b>
eth:cscDeliveryAddress \$	\$
ОК	Cancel

The structure of the expression is similar to that found in spreadsheet packages you may have used. Press **OK** twice to return to the design workspace.

There are numerous uses for conditional expressions. For example, documents usually look better if the printing of fixed text is suppressed when the variable information associated with it is blank. Hence your paper may contain <u>Drawing No</u>: as fixed text, followed by a variable drawing number taken from Match-IT; if this number is ever missing, your document will still say <u>Drawing No</u>:, but have nothing after it. You can prevent this by using a conditional expression.

Another form of condition available to you is appearance conditions. These allow an entire row of data from the details section of a paper to be suppressed if a condition is false. This can be useful in situations where you want to vary the column structure of the details section in a paper according to a specified condition. For example, if you cancel a line of a purchase order to a supplier, you will need to send your supplier written advice of this. In this situation, you might want to replace several columns in your purchase order paper (e.g. quantity, price, delivery date) with a single column saying ORDER LINE CANCELLED. Two data lines are therefore required in your table: one which specifies what to print if the order line is not cancelled (the usual condition), and a second to specify what to print if it is. This can be achieved with appearance conditions.

To do this, select the data line in your table that you want to control in this way, select the Appearance Condition property, drop down options and select Formula..., as shown below:

leader Line Data Line Footer Line Gro	ip Header Group Footer	
% 📴 • 😹 🗙 👗 🖻 🛅	↑ 🧄 🔠 ⋛↓ [+]	
Line Definition 1      Line.etq.LineItemReference      Line.etq.enqOurPartNum     Line.etq.enqTheirPartNum     Line.etq.mchName     Line.etq.FormattedQty     Line.etq.enqUnitPrice     Line.etq.enqDelBy	<ul> <li>□ Design</li> <li>□ Display in Designer</li> <li>Name</li> <li>□ Appearance</li> <li>□ Default Font</li> <li>□ Layout</li> <li>Appearance Condition</li> <li>Ignore Empty Line</li> </ul>	Show [Arial 10.0 pt] n True 💌 Show
<ul> <li>Line Definition 2</li> <li>A ""</li> <li>A ""</li> <li>A ""</li> <li>A "Drawing No:"+Line.etq.mchDra</li> <li>A ""</li> <li>A ""</li> <li>A ""</li> <li>A ""</li> </ul>	<ul> <li>         Outline level      </li> <li>         E Spacing     </li> </ul>	Hide Formula
(4)	Appearance Condition Appearance condition. Th condition evaluates to Fa	he item will not be printed if this

You can build any legitimate expression in the usual way, using combinations of variables, text, functions, etc. The illustration below is an appearance condition created for the second data line in the example used in this tutorial (which adds the drawing number into the Description column of our paper).

Variables and Functions	Condition Text Date Format Number Format Op	erators
	Functions:	Insert

The appearance condition is saying: "only print this second line of data if a drawing number is present for the part being quoted". (Note: 'not equal to blank' is the same as saying 'is present'.)

There are many other facilities available in *List & Label*. Far too many to mention here. Explore the *List & Label* help file and experiment. With a bit of imagination you can do amazing things.

### **10.2 External functions**

In the paper designer there is a function available called External\$(). This is used to provide access to certain *wizard operations* from within your paper. The External\$() function takes a single string parameter. That string must be formatted as a CSV list (Comma Separated Value) of terms. The first term must be the wizard operation name. Subsequent terms are whatever parameters are required by the wizard operation.

Only wizard operations that are of type FUNC can be used, and they must produce a string result and only take input string parameters. Consult the wizard operations help to see the list of operations available. Examples are gxDeQuote and nmGetText.

If the parameters to be passed to the operations could contain commas (,) or quotes ("), then enclose the string in <u>double</u> quotes ("), e.g. External\$('nmGetText,"'+Method.mcb.Notes+'"')

# 11 Printing Labels

Papers for labels are produced in much the same way as any other business document. The most important difference is that when designing for labels, *List & Label* provides a large number of standard labels sizes for you to choose from. This facility is accessed be selecting **Project** | **Page Setup**... from the *List & Label* menu bar. When designing a label, the Layout form has an extra tab called **Templates** as shown below:

Name   (user defined)	Size x	Size y	Dist x	Dist y	iount : la	iunt 1
Avery Dennison				_	_	
11536 Direct Print C	50.80 mm	12.70 mm	0.00 mm	0.00 mm	1	1
11537 Direct Print O	41.27 mm	12.70 mm	0.00 mm	0.00 mm	1	1
4150 PLP Mailing Lat	88.90 mm	28.57 mm	0.00 mm	0.00 mm	1	1
4151 PLP Mailing Lat	88.90 mm	28.57 mm	0.00 mm	0.00 mm	1	1
5226 Print or Write F	52.47 mm	16.23 mm	0.00 mm	48.76 mm	1	2
5227 Print or Write 1	56.38 mm	9.52 mm	0.00 mm	67.48 mm	1	2
5227 Print or Write 1	56.38 mm	14.91 mm	0.00 mm	62.10 mm	1	2
5227 Print or Write 1	56.38 mm	18.89 mm	0.00 mm	58.11 mm	1	2
5476 Print or Write (	31.75 mm	31.75 mm	4.77 mm	0.00 mm	2	1
5496 Print or Write (	31.75 mm	31.75 mm	4.77 mm	0.00 mm	2	1
5497 Print or Write (	31.75 mm	31.75 mm	4.77 mm	0.00 mm	2	1
5498 Print or Write (	31.75 mm	31.75 mm	4.77 mm	0.00 mm	2	1
5499 Print or Write (	31.75 mm	31.75 mm	4.77 mm	0.00 mm	2	1
9170 PLP Multi-Purpe	66.67 mm	25.40 mm	0.00 mm	0.00 mm	1	1
9176 PLP Multi-Purpe	87.32 mm	17.47 mm	0.00 mm	0.00 mm	1	1
4)			1			Ð
	12					
Only show template	s for current	page settings				

Select the size you require from the list on the Templates tab, or if it is not available you can create your own by setting the dimensions manually. To do this select the Layout Definition property on the Regions tab and click tab and click the regions tab and click tab and clic

📑 🏠 🏠 🖷			D
Standard layout	Layout     Layout Definition	99.00 mm × 3 💽	
	Size (horizontal)	99.00 mm × 3 M	9
	Size (vertical)	38.10 mm	
	Horizontal Dista	2.50 mm	
	Vertical Distance	0.00 mm	
	Horizontal Count	2	
	Vertical Count	7	
	Horizontal Offset	4.60 mm	
	Vertical Offset	15.80 mm	
	Print Order	2	
	Printer settings		
	Layout Definition For label and card projec area.	ts: sets the workspace	

You will be presented with the Page Setup form like this:

	Horizontal (x):	Vertical (y):	🖌 ок
Page:	210.00 mm	297.00 mm	X Cancel
Offset:	<b>┾.60</b> mm	15.80 mm	(? <u>H</u> elp
jize:	99.00 mm	38.10 mm	
Distance:	2.50 mm	0.00 mm	
<u>N</u> umber:	2	7	
Print Order → Ohorizont ↓ Overtical	al <del>e j</del>	• • • • • • • • • • • • • • • • • • •	

Desig	inina	Dan	orc
Desig	Jiiiig	rap	eis

When you come to use your label paper to print labels, you can direct Match-IT to print from a specific location on a part-used label sheet. For this option to be available, the Print on this station now and Preview then allow me to choose a printer... options must be checked on the Match-IT Confirm print dialog form, as shown in the illustration below:

Confirm
Confirm Print Options
Use an alternative print queue
Use this Print Queue: General
☑ Print from this station now
O Print the report to the nominated printer or output media without previewing
I Print the report to a printer or output media I choose without previewing
<u> <u> </u> 2 Preview then allow me to choose printer and output options before printing </u>
O 3 Preview only (you can still print from within the preview)
Main document layout is: UserOrderAck
Use an alternative copy count
Print this many copies: 1
Use an Alternative paper
Use this Paper Design: UserOrderAck
Do not print Linked layouts
Mail Opts Mail Opts

Pressing the **Select...** button on the PASS 2: Select print or preview options or cancel dialog that then appears activates a form that allows you to specify which label position on the sheet should be the starting point for printing.

latch Labels: 1877 [Copy 1 (	of 1]	×
PASS 2: Select print or prev	iew options or cancel	
Print Target		
🛃 KONICA MINOLTA ma	gicolor 5440DL	付 Change
🕂 Direct <u>t</u> o	📑 Printer	V Options
Save options permanen	tly	
Options		
🗊 First Page:	1	
Pages:		
<u>○</u> Range(s)		
(Enter pages or rai ex. '1,3-4,10-')	nges, separated by commas	if necessary,
Pri <u>n</u> t:	all selected pages	~
Start position:		
Line 7, Column 2		Select
<b>?</b>	St.	art 🗙 Cancel

The form will look similar to that shown below:

Choose Start Position	×
Label Order	
Dist out of	
Print Order	
🗸 ок	X Cancel

#### **Designing Papers**

56

You will see an image of the layout of the labels on the page which will reflect either the template you selected or the dimensions you specified when designing the label. Just click in the space where you want the first label printed.

When designing the label, you can also specify the direction in which printing proceeds from the starting position if more than one label is to be printed at a time.



Four options are available as shown in the Print Order group on the Page Setup form. While top-left to bottom-right seems natural, this can increase the risk that labels from a partly used sheet detach during printing and jam your printer. Using the labels on a sheet from the bottom towards the top reduces this risk; to implement this, select the horizontal bottom up option.

Like other business documents, labels can display different types of information: fixed text, variables, graphics, bar codes, etc., and these are entered on your label papers in the usual *List & Label* way. As before, the variables that are available to you will be those that are appropriate to the type of label paper you are designing.

Note that you cannot put tables on labels since the concept has no meaning in this context.

# **12** Printing Multiple Tables

The example we have used so far only had a single table in the paper. This is all that is available for a quotation. However, some documents in Match-IT can have more than one table, for example a dispatch note has two (the dispatch items and the stock batches that make up those items) and a works order can have up to eighteen!

When more than one table is available, when you create the first one you will be asked to select the data table. A form similar to the one below will be shown as you release the mouse after having drawn the area for the table:



This will show all the available data tables. Select the one you want, another form will then be shown like the one below:

Pre-selection of fields for a line definition		×
Line name:		
Useful to distinguish between different lines of	f the same type.	1
		Sec. 19
Insertable <u>f</u> ields:	<u>⊂</u> olumns:	X & D
<ul> <li> Image: Second se</li></ul>		
Please choose the fields to be printed in this lin	ne. Properties can be set in the next step.	
?	<ul> <li>✓</li> </ul>	OK X Cancel

This allows you to quickly select the fields you want by dragging them from the left pane to right pane. Only fields that are valid in the context will be shown. After dragging, press **OK** and the table contents definition form you've already seen above will be shown:

<ul> <li>✓ Ine Definition 1</li> <li>✓ Kit.wti.mchMaterial</li> <li>✓ Kit.wti.FormattedQty</li> </ul>	Rotation Text Format	0°	٥
Kit.wti.mchMaterial		0°	
Kit.wti.mchMaterial	Text Format		
		Normal Text	
	Action		
Kit.wti.mciBatchNum	Link URL		
Kit.wti.mciLocation	🗆 Layout		
	🕀 Alignment	Left	
	Appearance Condition	Show	
	Blank Optimization	Yes	
	🕀 Fit	Wrap	
	Fixed Height	not defined	
	Frame		
	Justified	No	
	Line Spacing	0.0 pt	
	Vert. Alignment	top	
	Appearance Condition	47 00	
	Appearance condition. The it condition evaluates to False.		nis

This can be edited in the same way as you've already seen. When you've done that and pressed **OK** to get back to the design workspace, you'll see a pane called the **Report Structure** (if this is not visible, press View | Windows | Report Structure in the menu). Initially it will show just a single table, like this:

Report structure		×
🛗 🎬 🔤	× % 🗈	
🖃 🧾 Report C	ontainer	
🛄 Table	e: Kit [Header2Kil	:]
Objects	Report str	Layers

You can now add more tables by using the tools available from this pane. Each table will occupy the same area on your paper, but the information content will be different. The tables will be printed in the order you see them here. You can also specify the order the records are printed within each table. To do this, press the drop-down on the <u>Sorting</u> property in the properties window, as shown below:

Pro	perties	×		
•	₹ [+]	0	-	A
Ξ	Design		2	
	Name		-10	
	Separator Ticks	True	-	4
⊡	Data		-	
	Filter	True	-	12-1
	Source Table Path	Kit		VA
Ξ	Appearance		-	
	Default Frame		-	12
Ð	Fixed Size	No	0	
Ξ	Layout		150	
	Appearance Condi	Show	-	A
Ð	Column Count	(Default)		Ċ
	Distance Before	0.00 mm		12
Ð	Outline level	0	-	Q
	Pagebreak Before	No	-	
	Pagebreak Condition	False		12
	Sorting	•	200	4
Ξ	Line Options		N	
	Data Lines	Kit.wti:ExternalNotes		
Ð	Footer Lines	Kit.wti:mchDescription		-
Ð	Group Footer Lines	Kit.wti:mciNotes		
	Group Header Lines	Kit.wti:mchIssueNotes		
		Kit.wti:Quantity		
		Kit.wti:Length Kit.wti:Width		
		Kit.wti:Height		-
		Kit.wti:UnitWeight		
		Kit.wti:TotalWeight		
		Kit.wti:FormattedQty		2
		Kit.wti:mchMaterial		
		Kit.wti:mchName		-
50	rting	Kit.wti:mchTechSpec		<b>v</b>
	rt order to use.		1 - L	VIMI
				🛱 Lay

For a complete example, open the UserJobCard paper in Match-IT and explore how it is setup. The table structure for that is shown below:

leport structure	
🛗 🎬 🚰	🗙 👗 🖻 🖺 👌 🚸
🗉 🧾 Report Co	ntainer
- Table:	Kit [Header2Kit, Kit.wti:mciLocation]
- 🔟 Table:	Part [Header2Part]
- Table:	Tool [Header2Tool]
🖶 🥅 Table:	StepStart [Header2StepStart]
	ble: StepOp [StepStart2StepOp]
- Table:	Return [Header2Return]
Table:	Output [Header2Output]

In this example, the kit section is printed, then the parts list, then the tools list, then the steps, then the kit returns, then the outputs. Within each step, the operations (resources) are printed.

Each table can be printed more than once if you want, for example you could print the kit list twice, once in location order and then again in batch number order. To do this, just add it to the structure again.