Creating Forms
In WordPerfect (101)

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COLLECTION MASTER

The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

Word Perfect – Specials

- wordperfect.com/en/product/office-suite/
  - Standard Edition – Upgrade $124.99
- https://www.wordperfect.com/en/pages/bar-association/
  - Standard Edition – Full Version $124.99
- Contact Sales, ask for volume discounts
  - By phone at 1-888-267-3548 ext. 2029
  - By email to wposales@corel.com

Word Perfect – Support Resources

- https://support.corel.com/hc/en-us/articles/216743858-Quick-Reference-Card-Getting-Help
  - Official Corel - WordPerfect Support
- https://www.wpuniverse.com/
  - Forum Style Help

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Products to Install

- WordPerfect
  - Avoid the bloat, only install the WordPerfect Word Processor
  - Think of it as Merge Tool.
- Don't install the other products
  - Most firms will also install the Microsoft Suite for other productivity tools.
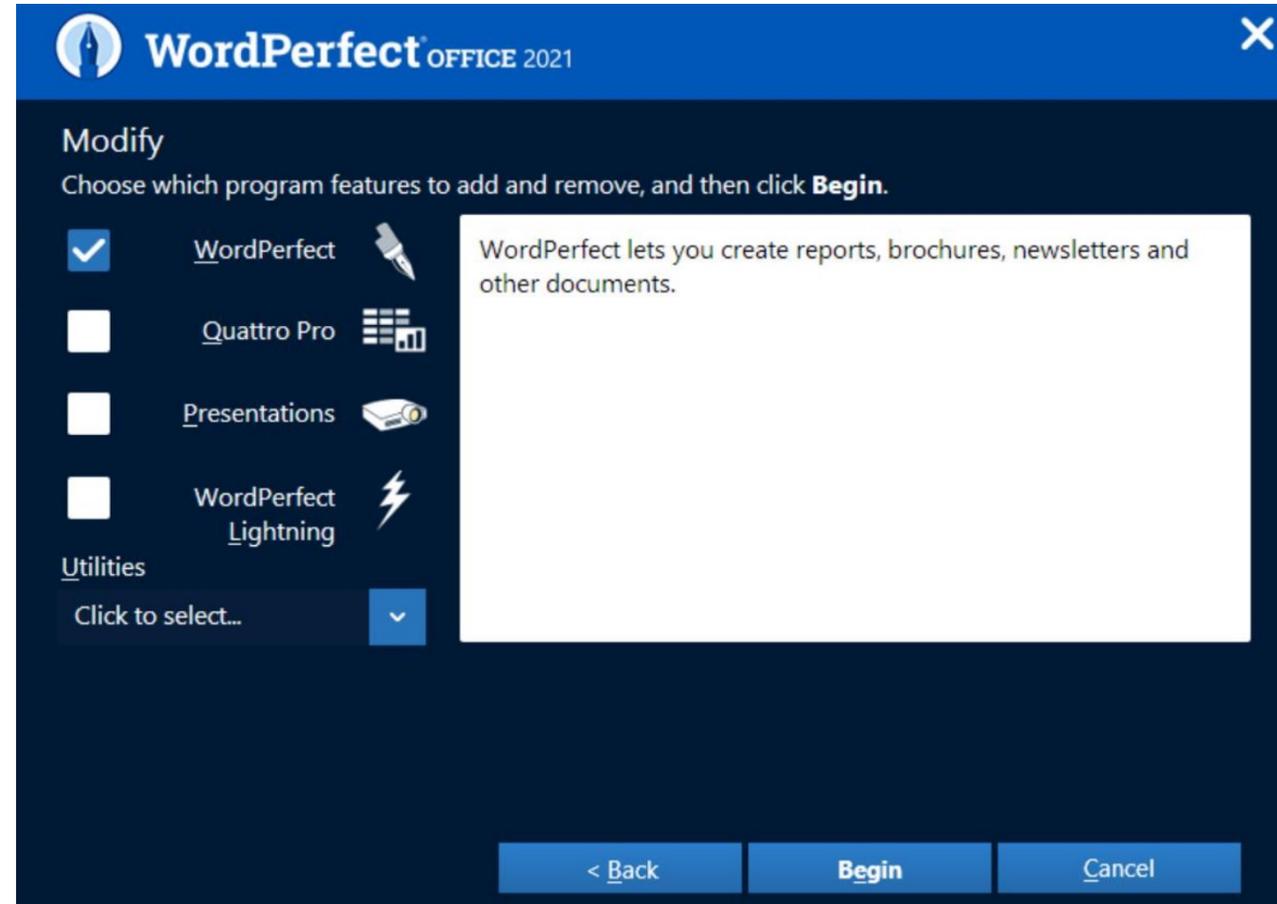
WordPerfect Mail Merge Document

Merge Input	Merge Operation	Merge Output	Post Merge Action
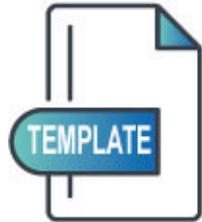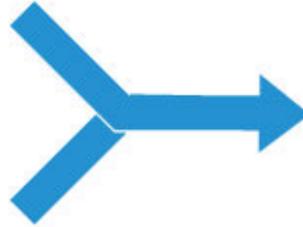
WordPerfect Template

Mail Merge

Merged Documents

vMedia

Collection-Master

PDF Documents

Printer

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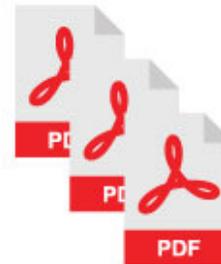
Secondary Merge File (Data)

- Collection-Master automatically creates this file for you
  - Letters
  - Pleading
  - PDF
  - Custom Forms

Merging /w MS-Word

Word Processing Default Information		1-S-4-9

Directory for Merge Forms: `F:\CLSINC\WORD`
Word Processor Type: `WP`

Use DSC in F114-119:
Default Extension for Forms:
Utilize Merge Pool: `Y`
Alternate Extension #1 & #2: `FRM`   `WPD`
Caption Fields: `3`
Alternate Extension #3 & #4: `DOC`
SMTP Server Name: `smtp.Vertican.com`
BCC E-Mail address:
Default Reply E-Mail Addr: `cliff.rahming@vertican.com`

Labels for Misc Data Fields

Field	Short	Long
Misc Amt #1:	Misc Amt 1	Misc Amount #1
Misc Amt #2:	Misc Amt 2	Misc Amount #2
Misc Date #1:	Misc Dt 1	Misc Date Num#1
Misc Date #2:	Misc Dt 2	Misc Date Num#2
Misc Comment #1:	Misc Cmt 1	Extra Info
Misc Comment #2:	Misc Cmt 2	Misc Comment 2
Misc Comment #3:	Misc Cmt 3	Misc Comment 3
Misc Comment #4:	Misc Cmt 4	Misc Comment 4

Enter Information for Form Setup

Letterhead

- f:\clsinc\word\ LHEAD.60
  - Example: LHEADCLS-v2.wpd
  - Called by Standoc1.x7
- f:\clsinc\word\ PLEADING.60
  - Called by Standoc2.x7
- f:\clsinc\word\PDF-SUIT.90
  - Called by PDF-DOC.90
- Custom Form Setup 1-S-6
  - Define various mail merge destinations

Mergedat

- After merging a document, a copy of the merge data is stored.
- N:\users\luis.Gomez\mergedat & Pleaddat
- Quick Entry
  - You will be asked for the # of fields.
    - Any answer is fine, pick 999
  - You can review the merge data, can help you to see what the actual values look like.

Inserting a Field Code

- Insert Field Code
  - Must be a Merge Document
  - Select No Association to field codes
- Macro CMField
  - Simple Macro asks for a field # and inserts the field.
- Copy existing Field Code and change the #
- ?
  - Adding a ? After the field # will instruct WordPerfect to "Remove the line" if the field code is blank.

Field Code Documentation

- Collection-Master Manual
  - Field Codes
    - Field Codes Numerical List
    - Field Codes Type
    - Field Code Maps
    - Help Window in Collection-Master

Conditional Statements

- IF(expr)
  - F:\CLSINC\WORD
  - Use "Quotes"
  - Remember Conditionals are comparing Strings
  - Math is easier performed in Formulas & FNScripts
- IFBLANK(field)
- IFNOTBLANK(field)

NestForm

- Include another document in the document.
- Sample Cases
  - Add letter head in the middle of the document
  - Use PS fields to insert document: FNestFrm.frm
- OnError
  - The danger of NestForm is the merge will fail if the document doesn't exist.
  - OnError may be used to trap for problem with the mail merge.

D-Multi

- f:\clsinc\word\Dmulti
  - Sample Form using "Report File" fields
- f:\clsinc\word\Dmultic.frm
  - Sample Form using "Companionated Claims" fields
- Multi-Line Fields work well in a Grid.
  - Create a cell for each field.
  - Fields have CRLF at the end.
  - Itemized fields have count / totals equivalents.

Conditional Page Breaks

- Format – Keep Text Together
  - WindowOrphan
    - Prevents the 1st and last lines of a paragraph from being separated across pages.
    - Protects the entire page, easy to implement and automatic.
    - A Paragraph is defined as a Carriage Return separated entry. Multiple lines are not treated as a paragraph.
  - Keep selected text together on same page.
    - Highlight a section, a "Block Protect" a section of the document.
    - All the lines are treated as a "Single Block" and will carry over to the next page together.

Advanced Concepts – Merge Pool

- Allow one user to gather and merge claims for other users.

- Enable in 1-S-4-9

- Users request documents as usual.

- When ready to have their documents
  - Send WP to Merge Pool

Advanced Concepts – Power Merge

- F:\CLSINC\BATCH\POWERMERGE.CMD
- Significantly enhance Mail Merge Performance
- Reduce conflicts due to file sharing
- Insulate user from original form documents

Advanced Concepts – Client Folder

- Create folder under WORD

- F:\clsinc\Word\Clients\
  - Forwarder #
  - Sort Code
  - EDI Type

- If the Folder exists use the version from the folder

Advanced Concept – System Resources

- Minimum of Dual Core CPU
  - If you are multitasking, additional CPU's will help!
  - Four CPU's will likely improve performance.

- Minimum of 16 GB of Memory
  - WordPerfect is a 32bit Application.
  - Up to 2GB of memory will be used by the application
  - The remaining memory will be used by other components
    - Hard Disk Cache
    - Printing
    - vMedia FTI

Advanced Concept – FTV

- File to vMedia (FTV)
- Add comment to document to populate vMedia Metadata
- vMedia also supports exporting individual PDF files during the merge.

Advanced Concept – Bar Codes

- vMedia supports 3 of 9 as well as 2D barcodes
- 2D Barcode:
  - See dbar.FRM
    - NestForm
      - F:\IMASTER\MODULES\BARCODE\INSDMBARCODE.WCM
      - Assign pDMBarcode;"~?IM~fileno=/~llcode=/"

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