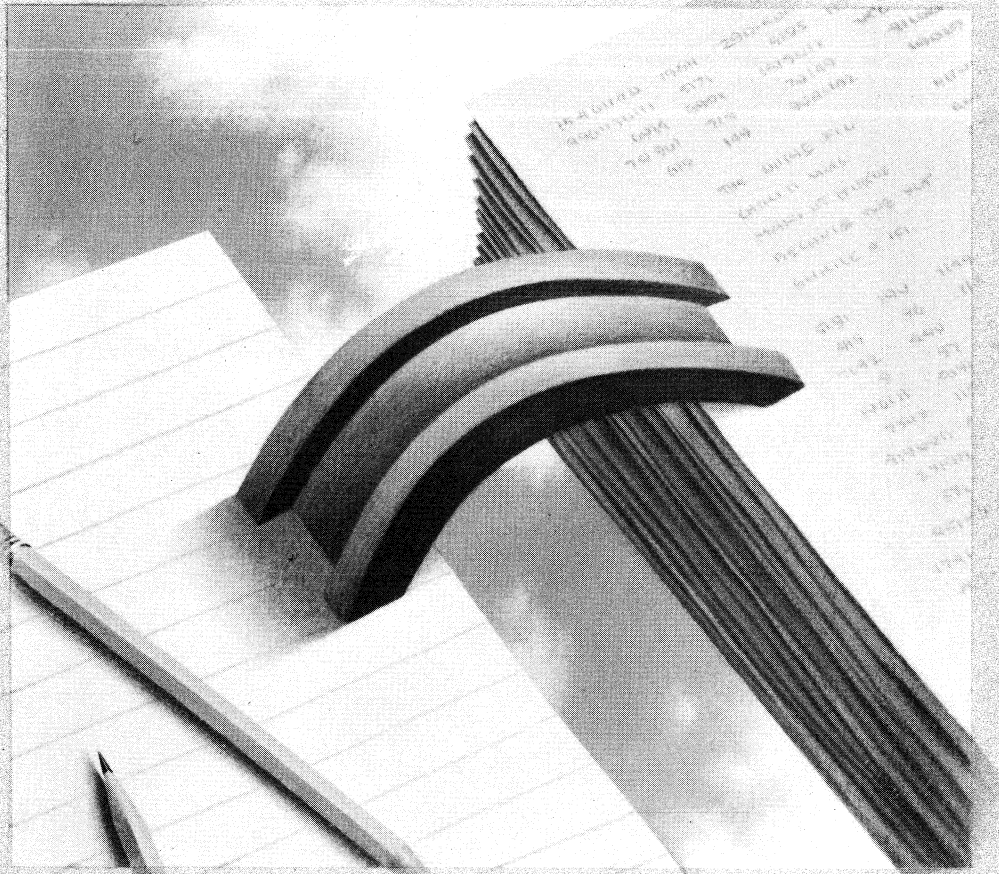


PERFECT COMPLEMENT REFERENCE MANUAL



The bridge between WordPerfect and your database.

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CREDITS

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Susan C. Wolfe
Manager, Documentation and User Interface

CONTENTS

Overview

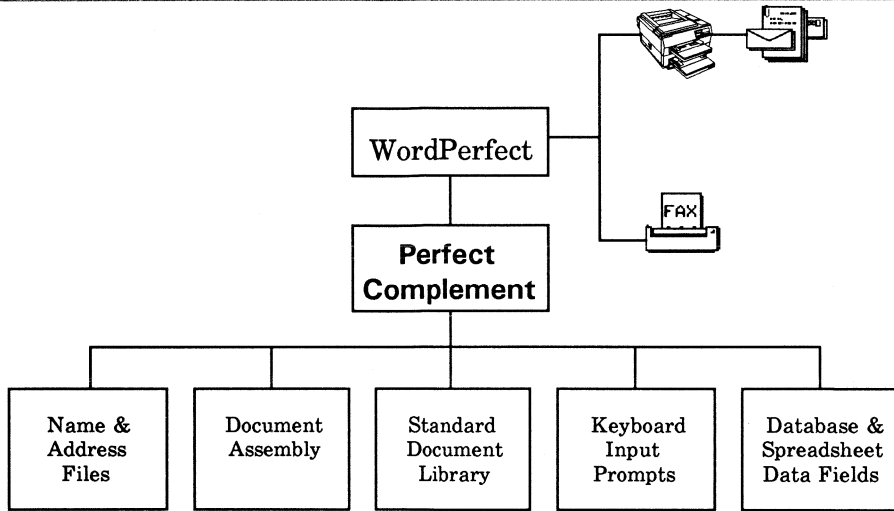
Installation & Setup	1
Starting Perfect Complement	10
Setup Configurations	11
Getting Around In Perfect Complement	33
Menus And Lists	38
Data Entry Forms	41
Essential Keys	42
The Main Menu	48
Standard Documents	51
Standard Documents	55
Suppressing Blank Lines	60
Advancing Records In A Document	61
Creating A Standard Document	62
Field Names	63
Library Maintenance	73
Library Reports	74
Standard Documents	76
Document Class	77
Document SubClass	80
Document Maintenance	85
External Database	117
Database Fields	132
Prompt Fields	140
List Fields	147
Selection Criteria	155
How To Use Selection Criteria	160
Adding A Selection Criteria Entry	161
Inserting & Removing Rules	167
Viewing A Selection Criteria Entry	167
Changing A Selection Criteria Entry	168
Removing A Selection Criteria Entry	168
Sort	170
Automatic Selection	177

Generating Documents	181
Quick Merge	185
Generating Documents	187
Selecting The Document	188
Answering List Field Menus	189
Answering Global Prompts	190
Selecting Data From A Database	190
Answering Per Letter Prompts	195
Printing The Documents	196
Name & Address Files	197
Customizing A Name & Address File	210
Name & Address Records	218
Name Search	230
Castaway List	235
Name & Address File Conversion	251
Sample Library	257
Standard Business Letter	262
Phone List	264
Labels	266
Envelope	268
Appendix	A 1
Converting From Version 1.x to 2.0	A 4
Customer Support	A 8
Error Messages	A 9
Error Status Codes	A14
Fax Merge	A18
Perfect Complement Files	A19
Recovering Damaged Files	A21

Glossary

Index

OVERVIEW



Perfect Complement is a program that provides a bridge between your database and WordPerfect. It is a *pre-processor* to WordPerfect, compiling all the necessary information before WordPerfect is even accessed. Perfect Complement is not a "Terminate and Stay Resident"(TSR) program, so your computer's memory is available for all of WordPerfect's features.

Perfect Complement allows you to *merge information created with other programs*, such as dBASE, PARADOX, R:BASE and LOTUS. You can run WordPerfect directly from the Main Menu. Perfect Complement removes itself from memory while WordPerfect is running. Only a small memory-resident function remains to automatically restart Perfect Complement.

You begin by creating a *Standard Document* in WordPerfect, inserting *Field Names* within the text for information to be merged from the Database or the keyboard. Once your Standard Documents are created in WordPerfect, you simply define them in Perfect Complement's Library. Then you are ready to let Perfect Complement work it's magic!

Perfect Complement's Library lets you organize and index your documents into *Classes* and *SubClasses* for easy and instant retrieval. You can also create *Document Sets*, where documents can be linked together so that they will be generated as a group.

When information is not contained in your database, you can create *Prompts*. A pop-up window will appear for you to enter information from the keyboard. The *List* feature allows you to select optional text from a pop-up menu for insertion into a Standard Document.

The *Name & Address Files* feature lets you create, customize and maintain your own database information. Perfect Complement gives you a "starter set" of information fields, which can be customized. You can add additional fields for information that you will need for your documents. You can perform a *Name Search*, as well as *move or copy records* from one Name & Address File to another. With the *File Conversion* feature, you can convert WordPerfect Secondary and Notebook files, and certain Ascii Delimited files, to Perfect Complement's Name & Address File format.

The *Selection Criteria* feature lets you set rules for selecting records from a database. The rules are stored in the Library and displayed for you during generation of documents. The *Automatic Selection* feature allows you to assign Selection Criteria to a document.

Help Screens are always available to explain your current position in the program.

A *Sample Library* gives you actual documents that you can generate or use as examples for creating your own.

There is also a *Toll-Free Installation Support Line* available should you need help installing Perfect Complement.

1

INSTALLATION & SETUP

CHAPTER 1 CONTENTS

Installation	5
Creating A Working Directory	9
Starting Perfect Complement	10
Setup Configurations	11
Character Set Mapping	11
Fax Merge Configuration	16
International Configuration	20
Location of Auxiliary Files	22
Preferences	23
Security	24
WordPerfect Executable	31

INSTALLATION

BEFORE YOU BEGIN

What You Need

The following are required to use Perfect Complement:

- IBM/PC/PS2 or compatible
- 640k system memory w/hard disk
- One 3½" or 5¼" disk drive
- MS-DOS 2.0 or higher (3.x for Networks)
- WordPerfect 4.x or 5.x installed and running on hard disk or network
- Intel Connection Co-Processor Board™ (required for use of Fax Merge feature)

Package Contents

The following should be included in your Perfect Complement package:

3.5" & 5.25" Installation Diskettes
Quick Start Card
Users Guide
Reference Manual
Registration Card

Registration

Be sure to fill out and return the enclosed Registration Card. This allows you to receive customer support, as well as product updates and information. Be sure to note your Serial Number for future reference.

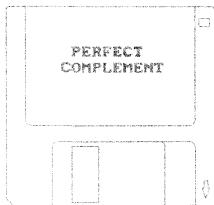
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For the latest additions to your software, check README.DOC in your Perfect Complement directory. It has been prepared, and can be printed, using WordPerfect.

IMPORTANT

If you are converting from Version 1.x to Version 2.0, refer to the Appendix for instructions. **DO NOT** perform the following installation procedure or the procedure for creating a working directory.

IMPORTANT



The Installation diskette contains a special program called **Perfect Complement Utilities**. The Utilities program will install the Perfect Complement files on your hard drive or network system and properly configure your computer to run Perfect Complement.

Before you begin the Install program, be certain you know where WordPerfect is installed on your computer (Example: **C:\WP** or **C:\WP50**).

***NOTE:** Follow this procedure for **NETWORK** installation.*

To begin, you must copy the files from the Installation diskette to your hard drive or network.

- 1 Turn on your computer. Exit from any menu utilities to the **DOS** operating system prompt.

Example: **C:>**

- 2 Create a directory where you want the Perfect Complement files installed. For example, **PC**. At the DOS prompt, type

Type **MD PC**

- 3 Make the Perfect Complement directory the current directory.

Type **CD PC**

- 4 Insert the Perfect Complement **Installation Diskette 1** into your disk drive (A: or B:).

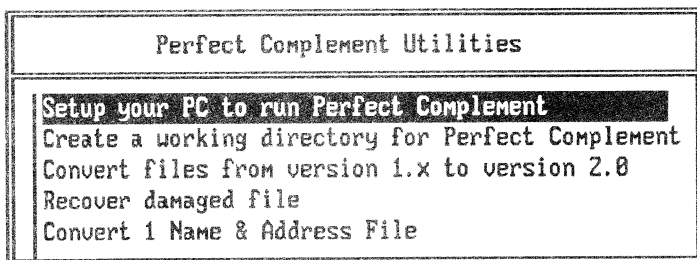
- 5 Type **COPY A:*.*/V** then press Enter. (B:*.*/V if using disk drive B)

This will copy the files from the Installation diskette to your hard drive or network.

- 6 Repeat steps 4 & 5 for any remaining Perfect Complement Installation Diskettes in your media size (3.5" or 5.25").
- 7 While in the Perfect Complement directory, type **QUICK START** at the DOS prompt.

The Perfect Complement files are shipped to you in compressed format. The individual programs and files will now be installed in your Perfect Complement directory.

- 8 After the files have been installed, the Perfect Complement **Utilities** menu will appear.



***NOTE:** If you need to exit the Utilities program and want to restart it again, go to the directory where the Perfect Complement program files are located and type **PCUTIL**. This will bring you to the Utilities menu.*

- 9 Select **Setup Your PC To Run Perfect Complement**.
- 10 Respond to the prompts.

The Install program will perform the following operations for you:

- Make certain you have enough memory (RAM) to run Perfect Complement.
- Request and verify the location of WordPerfect on your system.
- Locate or create your CONFIG.SYS file and make certain the FILES and BUFFERS parameters are set properly.
- Locate or create your AUTOEXEC.BAT file and set the Perfect Complement PATH parameter for you.

When the Installation procedure is complete, proceed to *Creating A Working Directory* on page 9.

CREATING A WORKING DIRECTORY

It is recommended that you not work in the same directory where the Perfect Complement Executable files are installed. It is best to keep the program files separate from the work files for ease of maintenance.

The **Utilities** program lets you create a "working" directory where the Library and work files will be installed.

To create a *working* directory:

- 1 From the Utilities menu, select **Create A Working Directory For Perfect Complement**. This may be the directory you normally work in or a new directory. If you want to create a new directory, **PCLIB** is suggested by our Support staff.

C:\PCLIB

- 2 Respond to the prompts.
- 3 Press **Esc** and exit from the Utilities menu.

Reboot your computer to make the Setup changes effective. You can reboot by holding down the **Ctrl & Alt** keys and pressing **Del (Delete)**.

Once the working directory is created, you are ready to run Perfect Complement. See *Starting Perfect Complement on page 10*.

STARTING PERFECT COMPLEMENT

After you have completed the Installation of Perfect Complement (or Conversion, if you are converting from Version 1.2 to 2.0), you are ready to start the program.

Make the Perfect Complement working directory the current directory.

- 1 At the DOS prompt, type **PC** and press **Enter**.

Perfect Complement prompts for an identification.

- 2 Type your initials, or any identifying characters up to 3 in length, and press **Enter**.

If your current directory does **NOT** contain the Perfect Complement Library file (LIBRARY.PC\$):

- 1 Type **SET PC\$ = Drive\Directory**. Press **Enter**.

Drive and Directory is the DOS drive letter and directory path containing the Perfect Complement Library.

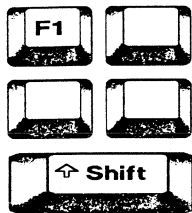
Example:

```
SET PC$=C:\PCLIB
```

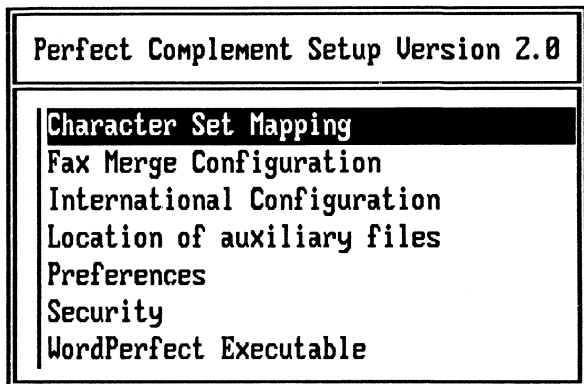
If you will always be working in this manner, you may wish to add the above line to your AUTOEXEC.BAT file.

- 2 Type **PC** and press **Enter**.
- 3 Type your initials and press **Enter**.

SETUP CONFIGURATIONS



The current Perfect Complement configurations can be found by pressing **Setup (Shift-F1)**. You may change these settings, if necessary.



CHARACTER SET MAPPING

Perfect Complement provides a character mapping feature in which ASCII characters appearing in the database, or keyed in response to a prompt, will be automatically mapped to a designated character in a WordPerfect character set. For more information, see *Compose*, *ASCII Conversion Chart* and *WordPerfect Character Set* in your WordPerfect Manual.

NOTE: To see the actual character displayed on the screen, use the "512 WordPerfect Character Set" setting found under *Display, Colors/Fonts/Attributes* on WordPerfect's Setup screen, or use the *View Document* feature (if you have graphics capability) found under the *Print (Shift-F7)* key.

To create a Character Set Map:

- 1 At the Main Menu, press **Setup (Shift-F1)**.
- 2 Select **Character Set Mapping**. The ASCII TO CHARACTER SET MAPPING Data Entry Form appears.

Character Set Mapping

Press **Enter**. A menu will appear. The default setting of Disabled will be the only entry.

Press **Ins (Insert)**. Type a **Map Name** for the Character Set Map you want to create. Press **Enter** when through.

ASCII to Character Set Mapping			
Character Set Map	Screen Pos.	Start Char Set	Character Number
Disabled	A		
Map Name Denmark			

Screen Position

Type the Screen Position Number for the ASCII character you want to add to the Map. Press **Enter**.

ASCII to Character Set Mapping			
Character Set Mapping Denmark			
Screen Pos.	ASCII Char	WordPerfect Char Set#	Character Number
134			

ASCII Character

The ASCII character that corresponds to the Screen Position Number will automatically appear when the number is entered. Press **Enter** twice.

ASCII to Character Set Mapping			
Character Set Mapping Denmark			
Screen Pos.	ASCII Char	WordPerfect Char Set#	Character Number
134	3		

WordPerfect Character Set

Press **Enter**. A list of WordPerfect's Character Sets appears.

NOTE: Refer to your WordPerfect Manual for a list of Character Sets.

Select the **Character Set** that contains the WordPerfect character that matches the selected ASCII character.

ASCII to Character Set Mapping			
Character Set Mapping Denmark			
Screen Pos.	ASCII Char	WordPerfect Character Set#	Character Number
134	å	1 (Multinational 1)	

1 (Multinational 1)
2 (Multinational 2)
3 (Box Drawing)
4 (Typographic Symbols)
5 (Iconic Symbols)
6 (Math/Scientific)
7 (Math/Scientific Extension)
8 (Greek)
9 (Hebrew)
10 (Cyrillic)
11 (Hiragana and Katakana)
12 (user-defined)

Character Number

Type the **WordPerfect Character Number** from the selected Character Set.
Press **Enter**.

ASCII to Character Set Mapping			
Character Set Mapping Denmark			
Screen Pos.	ASCII Char	WordPerfect Char Set#	Character Number
134	å	1 (Multinational 1)	35

- 3 Repeat step 2, beginning with **Screen Position**, for any additional characters you want to add to this Character Set Map.

ASCII to Character Set Mapping			
Character Set Mapping Denmark			
Screen Pos.	ASCII Char	WordPerfect Char Set#	Character Number
134	å	1 (Multinational 1)	35
237	ø	1 (Multinational 1)	81
	█		

- 4 Press **Esc** when through.

There is no limit to the number of Character Set Maps you can create, or the number of characters you can include in the map.

To *delete* a Character Map entry:

- 1 Highlight the line you want to delete.
- 2 Press **Del (Delete)**.

To *change* an item on a Character Map:

- 1 Highlight the item you want to change.

To change a Screen Position number or Character Number, simply type the new number.

To change a WordPerfect Character Set #, press Enter. Select the desired Character Set.

- 2 Press **Esc** or **Exit (F7)**.

FAX MERGE CONFIGURATION

To use the **Fax Merge** feature, you must have an Intel Connection CoProcessor™ installed in your computer.

Fax Merge Configuration	
CCP Boards Installed	NONE
Long distance template	
Local template	
Default fax resolution	Fine resolution
Fax cover sheet	No
Default sent by	
Logo file name	
Autoreceive	Disabled

The chart below lists the characters to be used when completing the template fields:

TEMPLATE FIELDS:

<u>Characters</u>	<u>Description</u>
0-9	Numbers
x	Used in place of the actual phone number. The phone number will be filled in from a Field in Perfect Complement. When setting up this configuration, you only need to specify the sequence of the numbers.
, (comma)	Inserted where a pause in dialing should occur. For example, when waiting for a tone for an outside line.
P	Use if your phone system supports PULSE dialing only.
T	Use if your phone system supports TONE dialing only.
M	MANUAL - if you want to use the current phone connection.

TEMPLATE ENTRY CHART:

The characters must be entered in the following order:

- Type of dialing - Pulse, Tone or Manual
 - Outside Line character - for example, if you must dial a 9 for a long distance outside line
 - Pause - if you must wait for a dial tone. For example, when waiting for an outside line.
 - Phone number - an "x" must be entered for each digit of the phone number that will be replaced by a digit from the database field. A dash (-) may be used in the phone number for readability but it is not required.
-

Use the Template Fields Chart on the previous page and the Template Entry Chart above as guides for entering your template dialing information.

Below is an example of how a template field might appear:

Template Entry = T9,1-xxx-xxx-xxxx

- T - Tone dialing
- 9 - Outside line
- , - Pause for dial tone
- 1 - For Long Distance
- x - one x for each digit in the phone #

Complete the Data Entry Form as follows:

CCP Boards Installed

Press **Enter**. Select the number of CCP boards that are installed in your computer.

Long Distance Template

Enter the "long distance" dialing requirements for your phone system.

Local Template

Enter the "local" dialing requirements for your phone system.

Default Fax Resolution

There are two resolutions for fax transmission - Standard and Fine. **Standard** is suitable for most transmissions.

To set the Resolution, press **Enter**. Select **Standard** or **Fine**.

Fax Cover Sheet

If you want to include a cover sheet with your fax transmission, press **Enter**. Select **Yes**.

Default Sent By

The Default Sent By name will be the name entered when the fax board was installed. If you want to change this name, type the name you want to appear on the sender line of the fax cover page. Press **Enter** when through.

Logo File Name

A logo file is a graphic file (.PCX or compatible format) that can be placed at the top of the cover sheet. Only one logo file per cover page can be used.

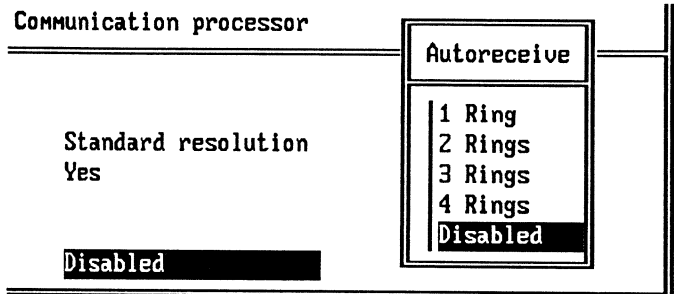
If you want to include a logo, type the **Drive:\Directory\Filename** of the logo file.

AutoReceive

Your fax board can be set to receive faxes automatically or manually. When Autoreceive is enabled, you can set the number of rings until answered.

To *enable* AutoReceive:

- 1 With the AutoReceive field highlighted, press **Enter**. The AutoReceive menu appears.



- 2 Select the desired number of rings.
- 3 Press **Esc** to return to complete the Communication Processor menu.

To *disable* AutoReceive:

- 1 At the Main Menu, press **Setup (Shift-F10)**. The Setup menu appears.
- 2 Select **Communication Processor**.
- 3 Highlight **AutoReceive**. Press **Enter**. The AutoReceive menu appears.

- 4 Select **Disable**.
- 5 Press **Esc** to return to the Setup menu.

INTERNATIONAL CONFIGURATION

The **International Configuration** menu lets you set a Country format and an International Currency Setup. These settings will affect all fields which may vary by Country, such as the date, time and currency.

International Configuration	
Country	United States
Currency Symbol	
Placement	
Decimal Places	2
Decimal Symbol	.
Thousands Symbol	,
Negative Symbol	-

Country

You can select a United States or Canadian format.

- 1 At the Main Menu, press **Setup (Shift-F1)**. The Setup menu appears.
- 2 Select **International Configuration**.
- 3 Highlight **Country** and press **Enter**. The Country menu appears.
- 4 Select **United States** or **Canada**.

Configuration		
Country	United States	Country
ENTER=Shift F10	Disable	Canada
		United States

- 5 Press **Esc** or **Exit (F7)**.

International Currency Setup

This feature lets you designate a currency format.

- 1 At the Main Menu, press **Setup (Shift-F1)**. The Setup menu appears.
- 2 Select **International Configuration**.
- 3 Complete the Configuration menu as follows:

Currency Symbol

Type the Currency Symbol you want to use. It can be up to 6 characters in length. For example, £ is the British Pound symbol.

Placement

Press **Enter**. The Placement menu appears. Select **Before** or **After** for placement of the currency symbol in front of or following the currency amount.

Decimal Places

Press **Enter**. Select the appropriate number of decimal places.

Decimal Symbol

Press **Enter**. Select the type of decimal symbol.

Thousands Symbol

Press **Enter**. Select the type of thousands symbol.

, = £25,000 . = £25.000
SPACE = £25 000
NONE = £25000

Negative Symbol

Press **Enter**. Select the way you want negative amounts displayed. For example:

£(25,000) Enclosed in ()
-£25,000 Preceded by a -

4 Press **Esc** to signal completion.

LOCATION OF AUXILIARY FILES

Auxiliary Files lets you set the location of the following:

Location of auxiliary files	
Perfect Complement Library	C:\PCLIB\
WordPerfect Documents	C:\WP51\DOCS\
WordPerfect Macros	C:\WP51\MACROS\
Fax File Directory	C:\PCLIB\FAX\

Perfect Complement Library - specify the drive and directory where the Perfect Complement work files and Name & Address Files are located.

WordPerfect Document Directory - if you keep your WordPerfect documents a separate directory, specify the drive and directory in which they are located.

WordPerfect Macros Directory - if you keep your WordPerfect Macros in a separate directory, specify the drive and directory in which they are located.

Fax File Directory - if you want to keep the temporary files created by Perfect Complement for the fax merge in a separate directory, specify the drive and directory.

To enter a path for the items on the Auxiliary Files menu:

- 1 Highlight the item you want and type the **drive:\directory**.
- 2 Press **Esc** or **Exit (F7)** when through.

PREFERENCES

The **Preferences** feature allows you to set the Enter key to perform the same function as pressing Retrieve (Shift-F10). When using a mouse, this setting will let the Select button perform the Retrieve function.

Enabling this function will let you access Data Entry Forms and other menus for modification by simply pressing the Enter key or mouse Select button.

To *enable* the Enter=Shift+F10 function:

- 1 At the Main Menu, press **Setup (Shift-F10)**. The Setup menu appears.
- 2 Select **Preferences**.
- 3 With **Enter = Shift F10** highlighted, press **Enter**. The Enable/Disable menu appears.
- 4 Select **Enable**.
- 5 Press **Esc** or **Exit (F7)**.

You may disable this function at any time by performing steps 1-4 and selecting Disable.

SECURITY

Perfect Complement offers a Security system that allows access to the program only through entry of a User Name and Password.

The Security system is enabled with the entry of the Administrator's name and password. Once enabled, each user **must** enter their name and a password to gain entry into Perfect Complement. The Security system can be disabled by the Administrator at any time. All User information will remain intact. If enabled again, the names and passwords will not have to be re-entered.

The Administrator may restrict a User from accessing the Library Maintenance functions. When disabled, Maintain Library will not appear on that User's Main Menu.

The **Administrator** Name and Password must be entered first, followed by each User Name and Password.

Adding An Administrator Name & Password

To add the *Administrator Name and Password*:

- 1 At the Main Menu, press **Setup (Shift-F1)** .
The Setup menu will appear.
- 2 Select **Security**. The Administrator Name prompt appears.
- 3 Type the **Administrator Name** and press **Enter**.
- 4 The Password prompt appears. Type a **Password** and press **Enter**.

***NOTE:** The Password will not display as you type it. This is to ensure confidentiality of your Password. Take your time to be certain you press the correct keys. You will be asked to verify your Password. If the two entries do not match, you must enter your Password again. You can go back and change your Password at any time.*

- 5** The **Verify Password** prompt appears. Type the Password again then press **Enter**.

The Administrator Name and Password are added to the User List. The Password will not be visible. The Administrator's name will only be visible on the Users list when entry into Perfect Complement is made by the Administrator.

***NOTE:** The Administrator's Password is critical. Only the Administrator can enable and disable the Security feature, restrict Library Maintenance for Users, and add Users to the list. If the Password is forgotten, entry into Perfect Complement is not possible. Security can only be maintained or disabled after entry into Perfect Complement. It is recommended that the Administrator's Password be written down and kept in a safe place, and that someone other than the Administrator be aware of its location.*

Adding A User Name & Password

A new User can only be added by the Administrator.

To add a User Name and Password:

- 1** From the Main Menu, press **Setup (Shift-F1)**. The Perfect Complement Setup menu appears.
- 2** Select **Security**. The User Name prompt appears.

*NOTE: If the Users list is already on the screen, press **Ins (Insert)**.*

- 3 Type your **User Name** then press **Enter**.
- 4 The Password prompt appears. Type the **Password** you would like to use. Press **Enter**.

NOTE: The Password will not display as you type it. This is to ensure confidentiality of your Password. Take your time when typing to be certain you press the correct keys. You will be asked to verify your Password. If the two entries do not match, you must enter your Password again. You can go back and change your Password at any time.

- 5 The **Verify Password** prompt appears. Type your Password again then press **Enter**.

Your name and password are added to the Users list. The password will not be visible.

- 6 Each User must perform steps 1-5 to add their names and passwords to the Users list.
- 7 Press **Esc** or **Exit (F7)** when through.

Changing A User Name

A User name can be changed, if necessary. This can be done only by the Administrator.

To *change* a User name:

- 1 With the Main Menu on the screen, press **Setup (Shift-F1)**. The Setup screen appears.
- 2 Select **Security**. The Users list appears.
- 3 Highlight the User name you want to change.

- 4 Press **Retrieve (Shift-F10)**. A User Name prompt appears. Type the correct name then press **Enter**.

The changed entry is added to the Users list.

- 5 Press **Esc** or **Exit (F7)**.

Deleting A User Name

A User name can be deleted only by the Administrator.

To *delete* a User Name:

- 1 With the Main Menu on the screen, press **Setup (Shift-F1)**. The Setup menu appears.
- 2 Select **Security**. The User list will display.

NOTE: You cannot delete the Administrator Name. If you try to, an error message will appear.

- 3 Highlight the name you want to delete and press **Del (Delete)**. A "Delete? Yes/No" menu appears. Select **Yes**.

The User Name and Password are removed from the Users list.

- 4 Press **Esc** or **Exit (F7)**.

Changing A Password

A Password can be changed by the Administrator or a User.

To *change* a Password:

- 1 With the Main Menu on the screen, press **Setup (Shift-F1)**. The Setup menu appears.

- 2 Select **Security**. The Users list will display.
 - 3 Highlight the appropriate name and press **Enter**.
 - 4 The User Information menu appears. Select **Password**.
 - 5 Type the new Password and press **Enter**.
 - 6 The Verify Password prompt appears. Type the Password again then press **Enter**.
- The change is made to the Password but is not visible.
- 7 Press **Esc** or **Exit (F7)**.

**Disabling
Library
Maintenance
For Users**

The Administrator may disable the Maintain Library function of Perfect Complement for any User. This will restrict the User from having access to the functions of Maintain Library.

When disabled, the User's Main Menu will not contain the Maintain Library heading. Only the Administrator can go back and enable Library Maintenance for a User.

To *disable* Library Maintenance:

- 1 Entry into Perfect Complement must be made by the Administrator.
- 2 With the Main Menu on the screen, press **Setup (Shift-F1)**. The Setup menu appears.
- 3 Select **Security**. The Users list appears.
- 4 Select the **User name** that you want to disable Library Maintenance for. The User Information menu appears.

- 4 Select the **User name** that you want to disable **Library Maintenance** for. The **User Information** menu appears.
- 5 Select **Disable Library Maintenance**. The **Disable/Enable** menu appears.
- 6 Select **Disable**.

Library Maintenance is now disabled for that User.

Disabling Security

The Administrator may disable the **Security** feature at any time. The **Users** list will remain intact if **Security** is enabled again.

To *disable* Security:

- 1 At the **Main Menu**, press **Setup (Shift-F1)**. The **Setup** menu appears.
- 2 Select **Security**. The **Users** list will display.
- 3 Select the **Administrator's Name**. The **User Information** menu appears.
- 4 Select **Disable Security**. A "Delete? Yes/No" prompt appears. Select **Yes**.

The **User Information** will remain intact in the event that **Security** is enabled again. With **Security** disabled, a **User** will only have to enter their initials, or any identifying characters up to 3 in length, at the **WordPerfect ID** prompt.

WordPerfect ID

The **WordPerfect ID** is used by Perfect Complement in three ways - as the default Author ID when adding Standard Documents to the Library, in Perfect Complement's creation of temporary work files, and in a network environment, it is passed to WordPerfect as the network ID.

To *change* your WordPerfect ID:

- 1 With the Main Menu on the screen, press **Setup (Shift-F1)**. The Setup menu appears.
- 2 Select **Security**. The Users list will display.
- 3 Select the appropriate **User Name**. The User Information menu appears.
- 4 Select **WordPerfect ID**. A WordPerfect ID prompt appears.
- 5 Type the new WordPerfect ID. Press **Enter**.

NOTE: A WordPerfect ID must be unique and can only be up to 3 characters in length.

The new WordPerfect ID is added under the User's name.

- 6 Press **Esc** or **Exit (F7)** to leave the Security menu.

WORDPERFECT EXECUTABLE

This heading contains the location of WordPerfect's WP.EXE file and the WordPerfect version number.

WordPerfect Executable	
WordPerfect Executable	C:\WP51
WordPerfect Version	5.1

WordPerfect Executable

To *change* the path to the WordPerfect Executable files:

- 1 At the Main Menu, press **Setup (Shift-F1)**. The Setup menu appears.
- 2 Select **WordPerfect Executable** from the Setup menu.
- 3 Select **WordPerfect Executable**. This field contains the current path to the file WP.EXE.
- 4 Type the **Drive:\Directory** where WP.EXE is located. Press **Enter**.
- 5 Press **Esc** or **Exit (F7)** twice to return to the Main Menu.

WordPerfect Version

To select a WordPerfect Version #:

- 1 At the Main Menu, press **Setup (Shift-F1)**. The Setup menu appears.
- 2 Select **WordPerfect Executable** from the Setup menu. The WordPerfect Executable menu appears.

- 3** Highlight **WordPerfect Version** and press **Enter**. Select your current version of WordPerfect.
- 4** Press **Esc** or **Exit (F7)** twice to return to the **Main Menu**.

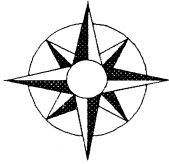
2

GETTING AROUND IN PERFECT COMPLEMENT

CHAPTER 2 CONTENTS

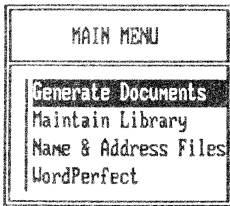
Menus and Lists	38
Level Windows	40
Data Entry Forms	41
Essential Keys	42
Mouse Support	47
The Main Menu	48

GETTING AROUND IN PERFECT COMPLEMENT



Getting around in Perfect Complement is easy and requires a minimum of keystrokes. Understanding some basic terms and the use of a few essential keys will enable you to master Perfect Complement.

MENUS AND LISTS



Perfect Complement displays a **Menu** whenever it wants you to select from a list of options. By moving the highlighted **Menu Selection Bar** to your choice and pressing Enter, you will proceed to the next level of operation.

You can move the Menu Selection Bar to an item by

- typing the first characters of its description,
- or*
- pressing the up and down arrow keys.

You can select from the Main Menu and the Library Maintenance menu by pressing the first letter of the menu item. When the letter is pressed, you will advance to the next level of the selected item.

Several Perfect Complement menus are actually lists of items, as in a list of documents or addresses. On these menus you can

- **Add** new items with the **Ins (Insert)** key,
- **Remove** items with the **Del (Delete)** key,
- **Change** items with **Retrieve (Shift-F10)**, or
- **View** items by pressing **Enter**.

Suppliers And Services	
Acme Glass And Scree/Fernburger	Reginald T. Fernburger
Blackbeard Marine /Hook	Phineas T. Hook
Bozo Clown Supply Co/Freeloder	Freddie Freeloder
Dundalk Marine Engin/Porter	Alvin Porter
Fulton Group /Barnsuorth	Mr. Arnold T. Barnsuorth
Johnson Lumber /Johnson	Mr. Douglas Johnson
Moore Graphics Arts /Moore	Mr. Lindsey Moore
Nuclear Physics Rese/Walters	Mr. John T. Walters
Reynolds Associates /Reynolds, Jr.	Mr. Arnold R. Reynolds, Jr.
Terrier Delivery Ser/McDuff	Mr. Sebastian McDuff

Some menus will give you the option of selecting more than one item by **Marking** each choice with the **Alt-F5 (Mark Text)** key.

On Class and Document menus, these symbols denote the following:

≡ denotes a Document Set

▶ denotes a SubClass

LEVEL WINDOWS

When you are working with Standard Documents in Maintain Library, or when you are generating documents, the screen will be split into two windows. The top window will display your level within the Library's directory. Since SubClasses can be nested to 7 levels, it will be helpful to know just which level you are at.

The bottom window will display the contents of the Class or SubClass you are currently in.

```
Credit & Collections
▶Credit
  ▶New Accounts
```

```
Credit Application
Credit Information Request
Loan Agreement
New Account Welcome Letter
Payment Terms Agreement
```

DATA ENTRY FORMS

A **Data Entry Form** is displayed when you have requested to add, view or change information that Perfect Complement maintains.

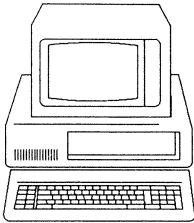
Suppliers And Services	
Reynolds Associates Reynolds, Jr.	
Company	Reynolds Associates
Name	Mr. Arnold R. Reynolds, Jr.
Title	President
Address1	1000 East River Drive
Address2	Suite 17
City	New York
State	New York
Zip Code	00245-
Phone No.	<123> 123-1233
Fax	<123> 123-1233
Salutation	Dear Arnold,

A highlighted **Field Selection Bar** shows the current Field within the Data Entry Form. The Arrow keys, Page-Up, Page-Down, Home and End keys all work to move the Field Selection Bar within the Data Entry Form. Pressing any alpha-numeric key or the Enter key causes the current field to be selected. A blinking cursor will appear to show your position within the Field.

When you are changing data in a field and want to restore the original contents, press **Cancel (F1)**. To save your changes, you must press **Esc** or **Exit (F7)**.

To exit from the Data Entry Form, press **Esc (Escape)** or **Exit (F7)**.

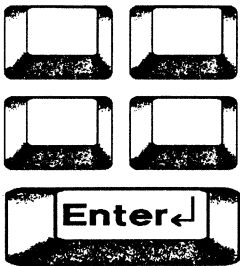
ESSENTIAL KEYS



Perfect Complement is key compatible with WordPerfect. You will find that, wherever possible, Perfect Complement has been designed to respond to the same function keys as WordPerfect. Keyboard control of the cursor will also be familiar to the WordPerfect user.

If you are new to WordPerfect or are using Perfect Complement with documents set up by someone else, you should review the following key functions.

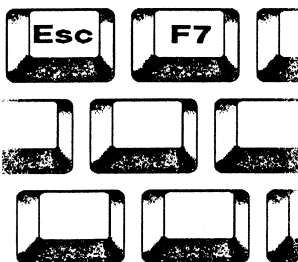
ENTER



The **Enter** key selects the currently highlighted menu item or field. When entering data it signals completion of the current field. When entering data in the last or only field of a Data Entry Form it will also signal completion of that form.

The Enter key can also be configured to perform the same function as pressing Retrieve (Shift-F10). See *Setup Configurations - Preferences* on page 23.

ESCAPE AND EXIT

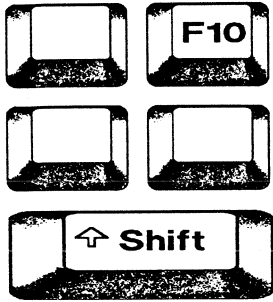


The **Esc (Escape)** key and **Exit (F7)** key perform the same function. These keys move you back one level from your current position in Perfect Complement.

If you are at the Main Menu either key will exit you from Perfect Complement and return you to the operating system (DOS) or shell. If you are at any other menu, pressing either key will return you to the previous menu.

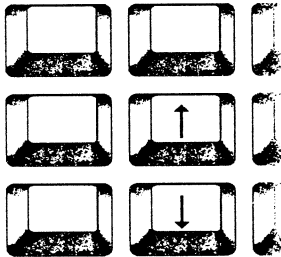
When entering data in a Data Entry Form **Exit** or **Esc** signals that you are finished in the Current Field (cursor visible) or have completed the form.

RETRIEVE

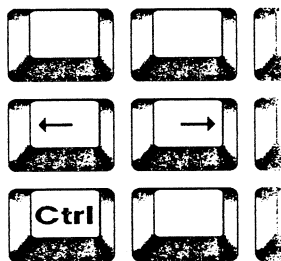


The **Retrieve (Shift-F10)** key selects a menu item for changes. The current values for the menu item appear in its Data Entry Form. When you Esc or Exit from the form, the changes are saved. You can *Cancel* instead of pressing Esc or Exit to prevent the changes from being saved.

ARROW KEYS



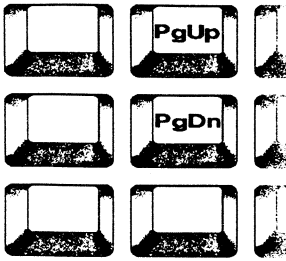
The **Up Arrow / Down Arrow** keys move the Menu Selection Bar and the Data Entry Form Field Selection Bar up or down one line.



The **Left Arrow / Right Arrow** keys move the data entry form Field Selection Bar to the previous or next field.

Within a data entry field, the Left Arrow/Right Arrow keys will move the cursor one character at a time over existing data. If the **Ctrl (Control)** key is held down when the arrow key is pressed, movement proceeds a word at a time in the indicated direction.

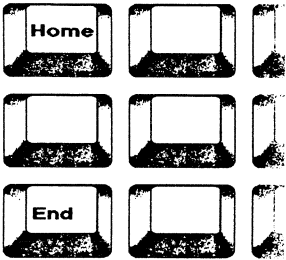
PAGE KEYS



When a menu contains a long list of items the **Page Up** and **Page Down** keys are used to scroll through the list one page at a time.

Within a data entry form the Page Up and Page Down keys move the Field Selection Bar to the first or last field in a group or list of fields.

HOME AND END KEYS



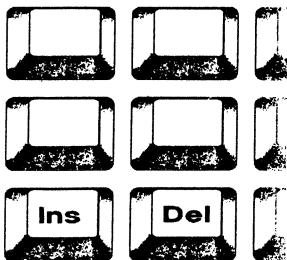
The **Home** key will move the Field Selection Bar in a data entry form to the first field of a line.

Within a data entry field the Home key will move the cursor to the beginning of the field.

The **End** key will move the Field Selection Bar in a data entry form to the last field of a line.

Within a data entry field the End key will move the cursor to the end of the data in the field.

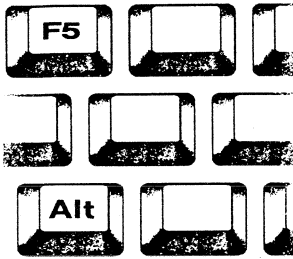
INSERT AND DELETE KEYS



The **Ins (Insert)** key is used when you wish to add a new item to a list of items displayed in a menu. On menus that do not allow you to add items the Ins key is disabled.

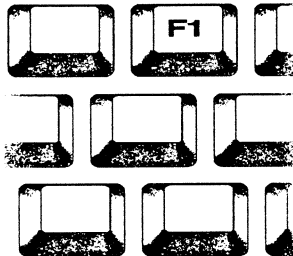
The **Del (Delete)** key is used when you wish to remove the item in a menu which is highlighted by the Menu Selection Bar. On menus that do not allow you to remove items the Del key is disabled. Whenever you delete an item a confirmation, "Delete? Yes/No," will display.

MARK



On some menus you will be given the option of selecting more than one item. To do this move the Menu Selection Bar to each item, hold down the **Alt (Alternate)** key, and press **F5**. This "tags" the item as selected. If you have marked an item by mistake, simply position the Menu Selection Bar on the item and press **Alt-F5** again.

CANCEL

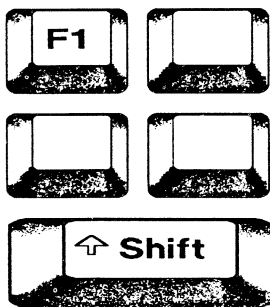


When you are changing data in a data entry field and wish to restore the original contents, press **Cancel (F1)**.

If you start to add or change an entry in the library and wish to exit without saving any changes, press **Cancel (F1)**.

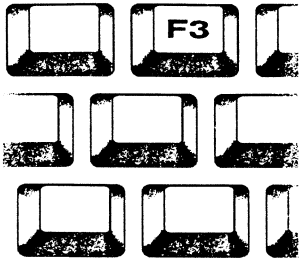
If you start to add or change an entry in a Name & Address file and wish to exit without saving any changes, press **Cancel (F1)**.

SETUP



The **Setup (Shift-F1)** key displays the current Perfect Complement configuration for various user parameters. Perfect Complement allows you to change these values. (See *Setup* on page 11.)

HELP



The **Help (F3)** key will bring you to an Application Help Screen. This screen will explain the Menu or Data Entry Form currently displayed. It will also tell you which keys to use to proceed or exit from your current location.

Some Help Screens are several pages long. Use the Page Up and Page Down keys to view the additional pages. Press **Exit** or **Esc** to leave the Help Screen.

Pressing the Help key a second time when the Application Help Screen is displayed will bring up a System Level Help Screen. This screen displays a table of keys recognized by Perfect Complement and gives a brief explanation of their function. If you are at the System Level Help Screen press **Exit** or **Esc** twice to leave the Help System.

MOUSE SUPPORT



Perfect Complement can be used with a mouse. A "mouse" is a hand-held device that allows you to perform many of the same functions as a keyboard.

You can use the mouse to select from all menus. Place the pointer on the desired menu item and click a button on the mouse. "Click" means to quickly press and release a mouse button.

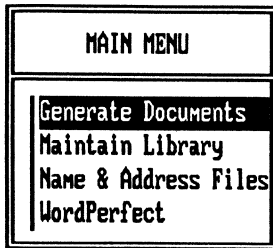
Left button = Select

Right button = Exit

Through the Setup screen, you can set the Select button to perform the same function as the Retrieve (Shift-F10) key. This lets you retrieve items for modification, such as Document and Field Data Entry Forms and Name & Address Files and Records. See *Setup Configurations - Preferences* on page 23 for more information.

To scroll through a menu list, place the pointer on the small up or down arrow on the left side of the box and hold down the Select (left) button. To scroll through the list an item at a time, click the Select button while the pointer is on the arrow.

THE MAIN MENU



The **Main Menu** lets you select the section of Perfect Complement you wish to work in. It also provides a convenient way to run WordPerfect for creating and maintaining Standard Documents, or for working directly in WordPerfect. Each Main Menu function is described in detail in this manual. The next few paragraphs provide a quick overview to help you understand how the different functions work together.

GENERATE DOCUMENTS

The **Generate Documents** section is the production end of Perfect Complement. When a document is selected for generation, Perfect Complement:

- Reads in the Standard Document
- Resolves any requests for optional text (List Fields) and creates a temporary WordPerfect Merge Primary File
- Asks the user for keyboard entry for any Prompt Field Names it finds
- Retrieves the information from the database to resolve any Database Fields and creates a WordPerfect Merge Secondary File
- Automatically runs WordPerfect and executes a Merge Macro to produce the documents

MAINTAIN LIBRARY

The **Maintain Library** section is where the initial setup is done to add Standard Documents to the Library. Any Field Name appearing in [brackets] in the Standard Document will also have an entry in the Library. The following are maintained in the Library:

Standard Documents and Document Sets are organized in *Classes and SubClasses* to give you a flexible filing system for your documents.

Database Fields let you take information from a database and insert it into a merged document.

Prompt Fields let you type information from the keyboard for insertion into the merged document.

List Fields provide a powerful "boilerplate" function. They allow you to choose items from a pop-up list for insertion into the merged document.

If you will be using an *External Database*, such as dBASE III, Paradox or R:BASE, you make a one-time entry in the Library. This entry tells Perfect Complement how to locate and process the database file.

Selection Criteria allows you to set rules for choosing and sorting records from a file. You may, for example, want to send an announcement to just your customers in San Francisco. The Selection Criterion would then be "City equal to San Francisco." You could also instruct Perfect Complement to sort the output by Zip Code.

NAME & ADDRESS FILES

The **Name & Address Files** section is a versatile data manager for information to be merged into your documents. Perfect Complement provides a "starter set" of basic information fields such as Name, Company, City, State and Zip Code. You may delete any of these you might not need for a particular file, and you can also add your own fields. This lets you customize a Name & Address File to your own needs.

WORDPERFECT

Perfect Complement will run WordPerfect directly from the Main Menu. When you exit from WordPerfect you will return to the Main Menu. Perfect Complement removes itself from memory when WordPerfect runs. Only a small memory-resident function remains to automatically re-start Perfect Complement.

***NOTE!** If WordPerfect will not run when you select it from the Main Menu, check your Setup. For more information, see Setup - WordPerfect Executable on page 31.*

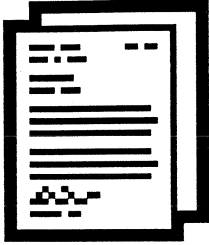
3

STANDARD DOCUMENTS

CHAPTER 3 CONTENTS

Standard Documents	55
Suppressing Blank Lines	60
Advancing Records In A Document	61
Creating A Standard Document	62
Field Names	63

STANDARD DOCUMENTS



The key to Perfect Complement is the **Standard Document**. A Standard Document is any WordPerfect document which contains Perfect Complement Field Names.

Field Names are placed in [brackets] in the Standard Document. There is a limit of 20 characters per Field Name, not including the brackets. When Perfect Complement finds a Field Name in a Standard Document it locates the Field Name entry in the Library. It then performs one of several functions based on the type of field. In a way, Field Names are how you program Perfect Complement. If you can type a letter in WordPerfect, you can set up a Perfect Complement Standard Document.

A Standard Document that is a listing of information, such as labels or a phone list, should be a template for a full page. For examples of this, see pages 58 and 61.

The following pages contain examples of Standard Documents before and after the merge.

● **BEFORE MERGE** ●

February 1, 1990

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

RE: Account No. *[Account Number]*

Dear *[Salutation]*:

Our records indicate that your account is *[Days Past Due]*. Please remit payment in the amount of \$*[Amount Due]* to prevent further damage to your credit rating. Payment must be received by *[Due Date]*.

We value your business and would like to have this matter resolved as quickly as possible so that we may continue to serve you. If you have any questions concerning your account, do not hesitate to call.

Sincerely,

[Credit Manager]
Credit Manager

Database Fields

[Name] [Account Number]
[Company?]
[Address1] [Days Past Due]
[Address2?]
[City], [State] [Zip Code] [Amount Due]

Prompt Fields

[Due Date]
[Credit Manager]

** Italics used for illustration purposes only!*

● **AFTER MERGE** ●

February 1, 1990

Hillary Johnson
290 West Avenue
Suite 24
Baltimore, MD 21236-7980

RE: Account No.: 827609

Dear *Ms. Johnson*:

Our records indicate that your account is *45* days past due. Please remit payment in the amount of *\$250.00* prevent damage to your credit rating. Payment must be received by *3/1/90*.

We value your business and would like to have this matter resolved as quickly as possible so that we may continue to serve you. If you have any questions concerning your account, do not hesitate to call.

Sincerely,

William T. Landers
Credit Manager

** Italics used for illustration purposes only!*

● BEFORE MERGE ●

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

All fields are Database Fields

● *AFTER MERGE* ●

David Masters
A-1 Security Service
9110 Locke Road
Suite 12
Baltimore, MD 21236

Thomas Collins
Nuts & Candy Company
322 First Street
Watson, VA 32981

Carol Thames
Bright Idea Designers
612 E. Swan Street
Philadelphia, PA 31992

Beverlee Houghton
Overland Trucking Co.
430-A Kelso Highway
Pittsburgh, PA 54392

Harrison Wade
Dependable Delivery Co.
756 Reese Road
Arlington, VA 43920

Paul Moore
Richards & Moore
1093 Delmar Avenue
Suite 39
Newman, MA 59933

Bob Smithson
Furniture Storage Plus
209 Riverview Road
Bel Air, MD 21109

Gregory Vincent
Sharp Line Fashions
349 Masson Street
Baltimore, MD 21093

Daniel Payne
Harbor Real Estate
3299 Ocean Highway
Suite 43
Miami, FL 74633

Frank James
Technology Corp.
7564 Circuit Road
Suite 32
Jackson, SC 45938

Susan Carlton
Movie Shop
72 Chapman Drive
Baltimore, MD 21236

Alan Dillon
Water Works Pool Co.
843 Stetson Street
Tampa, FL 8764



SUPPRESSING BLANK LINES

If you are using Field Names from a database or Name & Address File that may be blank, insert a *question mark* inside the closing bracket. This will signal Perfect Complement to not leave a blank line.

NOTE: The field that you place a ? in must be at a left margin setting or in front of an Advance To Position command. If the field is placed after spaces or tab stops, and the line is suppressed, the next printed line will not position properly.

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

This record did not have a **Company** or **Address2** field but no blank lines were left.

	
ACE ACCOUNTANTS, INC.	
	Alex W. Fielding 719 Dunmore Drive Denver, CO 36737

ADVANCING RECORDS IN A DOCUMENT

If you are creating a document, such as a phone list or labels, you will want to advance through records in the database or Name & Address File. Use an *exclamation point* inside the closing bracket to tell Perfect Complement to advance to the next record. You must, however, omit the ! from the last field on the page to stop advancement for that page.

PHONE LIST

<u>COMPANY</u>	<u>NAME</u>	<u>PHONE NUMBER</u>
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]

CREATING A STANDARD DOCUMENT

You create a Standard Document using WordPerfect. There are no control codes or other restrictions on the use of WordPerfect features. Do not, however, use WordPerfect merge codes in your Standard Document. Perfect Complement automatically creates the merge codes for WordPerfect.

February 1, 1990

[Name]

[Company?]

[Address1]

[Address2?]

[City], [State] [Zip Code]

Dear [Salutation]:

We received your check, number [Check Number], in the amount of \$[Check Amount]. However, [Reason Returned]

Sincerely,

[Credit Manager]

Credit Manager

NOTE! All files should be created by or converted to your present version of WordPerfect. Perfect Complement works with all versions of WordPerfect.

FIELD NAMES

[Name]

[Company]

[Address1]

[Address2]

[City], [State]

A **Field Name** is contained in [brackets] and placed in the Standard Document where *variable* information will be inserted.

There are three types of fields, each with its own unique function -

- **Database Fields**
- **Prompt Fields**
- **List Fields**

A *Database Field* tells Perfect Complement to extract data from a database or Name & Address File. Database records are chosen from a list or selected using Selection Criteria (see *Selection Criteria on page 155*). Data is then placed in a secondary file for automatic insertion in the finished document.

A *Prompt Field* causes Perfect Complement to display a Data Entry Form for keyboard input of data. It will automatically insert the data in the finished document.

When a *List Field* is found Perfect Complement displays a Pop-Up menu. This menu is a list of files containing optional WordPerfect text to add to the Standard Document. They may, for example, be optional clauses for a contract or a selection of different strength phrases for a collection letter.

● STANDARD DOCUMENT WITH DATABASE FIELDS ●
BEFORE MERGE

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

● STANDARD DOCUMENT WITH DATABASE FIELDS ●
AFTER MERGE

David Masters
A-1 Security Service
9110 Locke Road
Suite 12
Baltimore, MD 21236

Thomas Collins
Nuts & Candy Company
322 First Street
Watson, VA 32981

Carol Thames
Bright Idea Designers
612 E. Swan Street
Philadelphia, PA 31992

Beverlee Houghton
Overland Trucking Co.
430-A Kelso Highway
Pittsburgh, PA 54392

Harrison Wade
Dependable Delivery Co.
756 Reese Road
Arlington, VA 43920

Paul Moore
Richards & Moore
1093 Delmar Avenue
Suite 39
Newman, MA 59933

Bob Smithson
Furniture Storage Plus
209 Riverview Road
Bel Air, MD 21109

Gregory Vincent
Sharp Line Fashions
349 Masson Street
Baltimore, MD 21093

Daniel Payne
Harbor Real Estate
3299 Ocean Highway
Suite 43
Miami, FL 74633

Frank James
Technology Corp.
7564 Circuit Road
Suite 32
Jackson, SC 45938

Susan Carlton
Movie Shop
72 Chapman Drive
Baltimore, MD 21236

Alan Dillon
Water Works Pool Co.
843 Stetson Street
Tampa, FL 8764

● STANDARD DOCUMENT WITH DATABASE, PROMPT & LIST FIELDS ●
BEFORE MERGE

February 1, 1990

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

Dear *[Salutation]*:

We received your check, number *[Check Number]*, in the amount of *[Check Amount]*. However, *[Reason Returned]*

Sincerely,

[Credit Manager]
Credit Manager

DATABASE FIELD

[Name]
[Company]
[Address1]
[Address2]
[City] [State] [Zip Code]

PROMPT FIELD

[Check Number]
[Check Amount]
[Credit Manager]

LIST FIELD

[Reason Returned]
Damaged in the mail
Failed to endorse
Incorrect amount
Insufficient funds
Not payable to us

** Italics used for illustration purposes only!*

● STANDARD DOCUMENT WITH DATABASE, PROMPT & LIST FIELDS ●
AFTER MERGE

February 1, 1990

*Reginald T. Fernburger
Acme Glass & Screen
9301 Burton Avenue
Leesburg, VA 77665*

Dear *Mr. Fernburger*:

We received your check, number 3246, in the amount of \$512.00. However, *you failed to endorse the check.*

Please endorse the enclosed check and return it to us at your earliest convenience.

Sincerely,

Tony Carlucci
Credit Manager

** Italics used for illustration purposes only!*

4

LIBRARY MAINTENANCE

CHAPTER 4 CONTENTS

Library Maintenance	73
Library Reports	74
Standard Documents	76
Document Class	77
Document SubClass	80
Document Maintenance	85
Adding A Document To A Class	85
Adding A Document To A SubClass	91
Viewing Document Information	96
Changing Document Information	96
Removing A Document	100
Document Sets	101
Resolving Undefined Field Names	114
External Database	117
Database Fields	132
Prompt Fields	140
List Fields	147

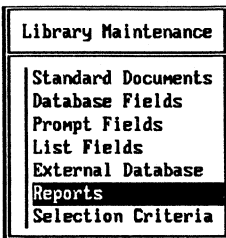
LIBRARY MAINTENANCE

Library Maintenance
Standard Documents
Database Fields
Prompt Fields
List Fields
External Database
Reports
Selection Criteria

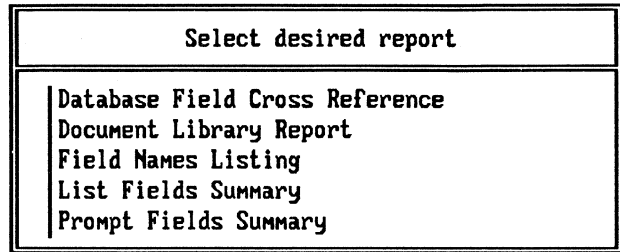
The Perfect Complement Library provides a place for you to store Standard Document information. It also is where you will define the Field Names and Selection Criteria.

To maintain the Library, select **Maintain Library** from the Main Menu.

LIBRARY REPORTS



Perfect Complement's **Reports** function lets you generate reports on various contents of the Library. The following reports are available:



To generate a *single* report:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Reports** from the Library Maintenance menu.
- 3 Select the **report** you want to generate.

Perfect Complement will use WordPerfect to generate the report.

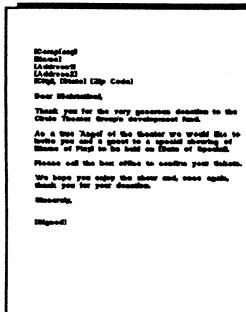
To generate *multiple* reports:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Reports** from the Main Menu.
- 3 Highlight the first report you want and press **Mark Text (Alt-F5)**. The line will flash, indicating it has been selected.

- 4 Repeat step 3 for each report you want to generate.
- 5 After all desired reports are marked, press **Esc** to begin generation.

Perfect Complement will use WordPerfect to generate the reports.

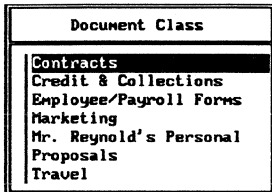
STANDARD DOCUMENTS



Once you have created a Standard Document using WordPerfect, you need to add it to the Library. Perfect Complement organizes Documents in the Library by Class. Class is simply a heading or grouping that will help you locate your documents. There is also the option to define SubClasses, which allow even greater flexibility for organizing your documents.

To maintain Standard Documents select **Standard Documents** from the Library Maintenance menu.

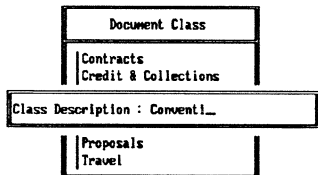
DOCUMENT CLASS



When you set up Perfect Complement for the first time there are no Class headings. You will need to add Class headings to store documents in the Library. You can add new Class headings at anytime.

There is a limit of 255 Class headings in the Library.

ADDING A DOCUMENT CLASS



To *add* a new Class heading to the Library:

- 1 Select **Standard Documents** from the Library Maintenance menu.
- 2 With the Document Class menu displayed press **Ins (Insert)**.

The CLASS Data Entry Form appears.
- 3 Type a Class description. The description may be up to 40 characters in length.
- 4 Press **Enter**.

Perfect Complement inserts the new document Class in alphabetical order on your Document Class menu.

CHANGING A CLASS DESCRIPTION

To *change* the description for an existing Class:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 With the Document Class menu displayed, highlight the Class you wish to change.
- 4 Press **Retrieve (Shift-F10)**.

The CLASS Data Entry Form appears with the current field value.

Document Class
Contracts Convention
Class Description : Conventions & Seminars
Mr. Reynold's Personal Proposals

- 5 Type your changes.
- 6 Press **Enter**.

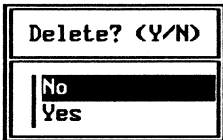
Perfect Complement replaces the old Class description with the new one and keeps any documents that were stored there.

REMOVING A DOCUMENT CLASS

You can remove a document Class that is no longer needed. The Class must not have any SubClasses or documents in it.

To *remove* a Document Class:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 With the Document Class menu displayed, highlight the Class you wish to remove.
- 4 Press **Del (Delete)**.
- 5 A "Delete? Y/N" menu will appear. Select **Yes** and press **Enter**.



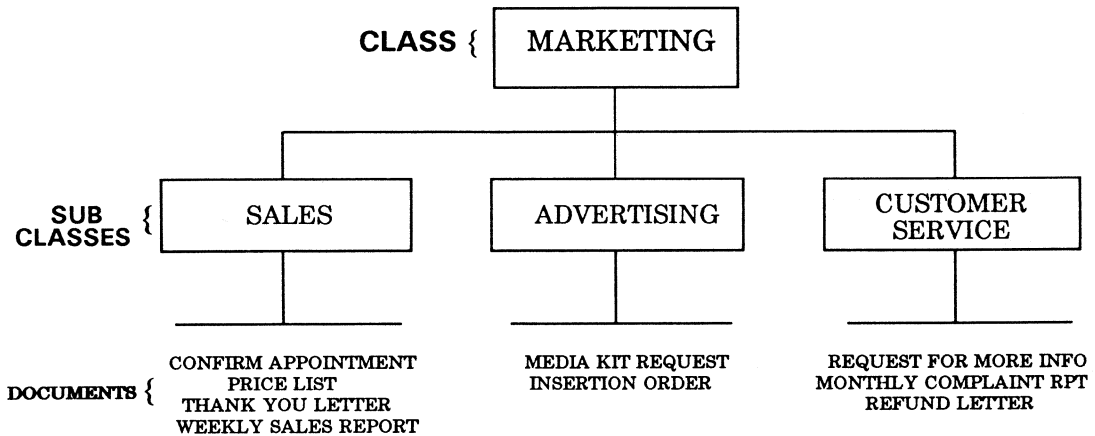
A screenshot of a terminal-style menu. The title bar reads "Delete? (Y/N)". Below the title bar, there are two options: "No" and "Yes". The "Yes" option is highlighted with a black background and white text, indicating it is the selected choice.

***NOTE!** If you try to remove a Class which still contains SubClasses or documents, you will get an error message. You must first remove all the SubClasses and/or documents.*

Perfect Complement will remove the Document Class from the menu.

DOCUMENT SUBCLASS

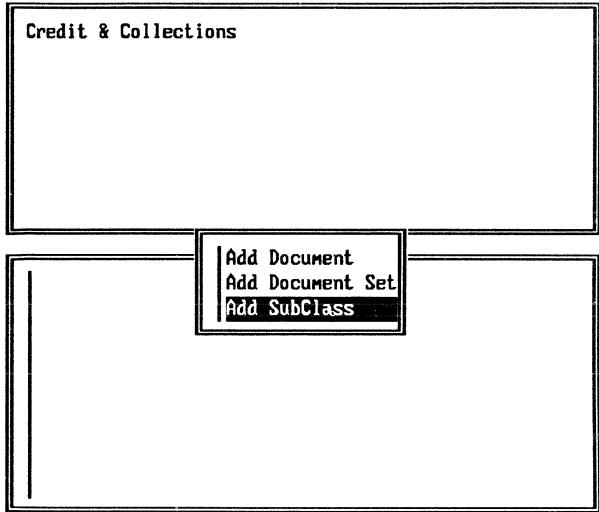
After you have set up your Document Class headings, you can add your documents directly to the Class, or you can add **SubClasses** and then add your documents to the SubClass. There is no limit to the number of SubClasses a Document Class may contain. You can also add a SubClass within a SubClass. This is called "nesting." You may nest a SubClass to 7 levels.



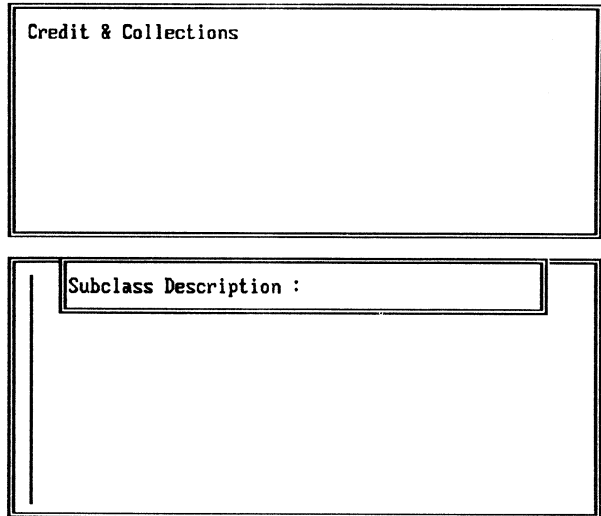
ADDING A SUBCLASS

To *add* a SubClass:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu. A list of your current Document Class headings will appear.
- 3 Select the Class you want to add a SubClass to. A list of the documents in the Class will appear. If this is a new Document Class, the list will be empty.
- 4 Press **Insert**. The **ADD** menu appears.



Select **Add SubClass**. A SubClass Description prompt appears.



- 5 Type a description for the **SubClass**. It may be up to 64 characters in length.

Credit & Collections

Subclass Description : Credit

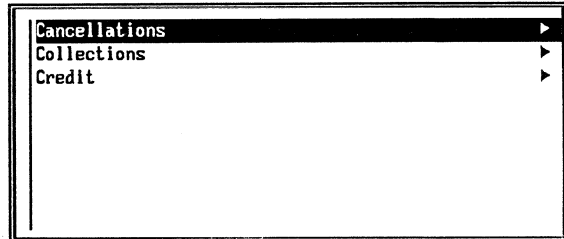
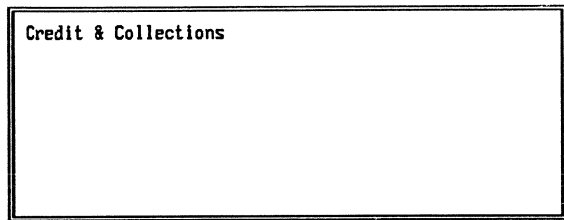
- 6 Press **Enter**. The SubClass will be added to the list.

Credit & Collections

Credit

Indicates a SubClass

- 7 Repeat steps 4 through 6 for each SubClass you want to add to this Class.



► denotes a SubClass. This symbol will appear to the left of the SubClass description.

You can add documents to a SubClass anytime after you have defined the SubClass. (*See Adding Documents To A SubClass on page 91.*)

CHANGING A SUBCLASS DESCRIPTION

To *change* the description for an existing SubClass:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 Highlight the Class that contains the SubClass you want to change.
- 4 Highlight the **SubClass** you want to change and press **Retrieve (Shift-F10)**.

The SUBCLASS Data Entry Form appears with the current description.

5 Type your changes.

6 Press **Enter**.

Perfect Complement replaces the old SubClass description without affecting the contents of the SubClass.

REMOVING A DOCUMENT SUBCLASS

You can remove a document SubClass that is no longer needed. The SubClass must not have any documents or other SubClasses in it.

To *remove* a Document SubClass:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 Highlight the Class that contains the SubClass you want to remove.
- 4 Highlight the **SubClass** you want to delete.

Delete? (Y/N)
No
Yes

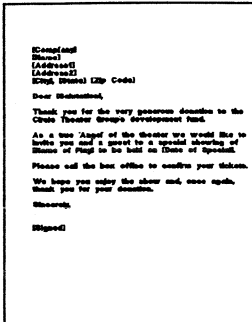
NOTE: You cannot delete a SubClass that has documents in it. You must first remove all documents in the SubClass.

5 Press **Del (Delete)**.

6 A "Delete? Y/N" menu will appear. Select **Yes** and press **Enter**.

Perfect Complement will remove the SubClass from the menu.

DOCUMENT MAINTENANCE



Once you have set up a Document Class, and any SubClasses, you are ready to store your Standard Document information in the Library. You should have already created the Standard Document in WordPerfect and saved it as a WordPerfect file.

There is no practical limit to the number of documents you can store in the Library. Perfect Complement does not make a copy of the WordPerfect file in the Library. It keeps the information you provide about the file name and continues to work with the original file.

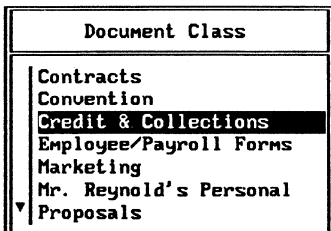
If you have added SubClasses, see *Adding Documents To A SubClass on page 91*.

NOTE! Once you have added a document to the Library you should **NOT** erase or move the original WordPerfect file.

ADDING A DOCUMENT TO A CLASS

To *add* a Standard Document to a **Class** in the Library:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 Select the desired Class. A list of documents for the Class will appear. If this is a new Class, the list will be empty.



Marketing

4 Press **Ins** (Insert). The **ADD** menu appears.

Select **Add Document**. The **ADD DOCUMENT** Data Entry Form appears.

Marketing

Add Document	
Document Desc.	
WordPerfect File	C:\DEMON
Author	you
Merge to	Printer
Instructions	
Automatic Selection	Disable
Database	
Selection Criteria	
Document Control	Single Document

Document Desc.

Type a clear description of the document. This description appears in Perfect Complement menus. It may be up to 64 characters in length.

WordPerfect File

Provide the full drive, path, and file name of the WordPerfect file. Perfect Complement defaults to the current drive and directory, or document directory, if configured.

To add the file name, press **Shift-F10 (Retrieve)**. The cursor will be at the end of the default information. Type the file name.

You may also press **F5 + Enter** to display a list of the files in your WordPerfect directory. Highlight the appropriate file and press Enter.

Author

Provide the name of the document's author.

Perfect Complement defaults to the User ID initials.

Merge to

When Perfect Complement generates your document it can instruct WordPerfect to merge to the Screen, the Printer, or directly to a fax board.

Marketing	
Add Document	
Document Desc.	Price List
WordPerfect File	C:\DEMO\PRICE.LST
Author	you
Merge to	Printer
Instructions	
Automatic Selection	Disable
Database	
Selection Criteria	
Document Control	Single Document

Merge to
Fax
Printer
Screen

Fax

Allows you to send the merged document(s) directly to a fax board for transmission. (*See Fax Merge Requirements on page 17 of the Appendix.*)

Printer

Allows you to merge documents directly to the printer.

Screen

Allows you to view the merged document before sending it to the printer or saving it to disk. See your WordPerfect manual for memory considerations when merging to the Screen.

Instructions

You can enter instructions that will appear on the screen during generation. These instructions will not appear on the printed document. For example, you could enter a reminder to "Include Application Form," or "Send Copy of Monthly Report," etc.

IF YOU DO NOT WANT TO ENTER INSTRUCTIONS, PRESS THE DOWN ARROW KEY TO MOVE TO THE NEXT FIELD.

To enter instructions:

Press **Enter**. An Instruction entry window will appear.

Enter the instructions. Press **Esc** or **Exit (F7)**.

A prompt will ask "**Save changes? Yes/No.**" Select **Yes** to save the instructions. Select **No** to exit the Instructions window without saving.

Automatic Selection

The Automatic Selection feature lets you "assign" a Selection Criteria to a document. Whenever the document is generated, it will use the assigned Selection Criteria to automatically select records for printing.

If you want to use the Automatic Selection feature, refer to page 177 for instructions.

If you **do not** want to use the Automatic Selection feature, press **Enter** to advance to the Document Control field.

Document Control

Press **Enter**. The Document Control menu appears.

Single Document

The document will cycle through prompts one time to produce a single document. If there are database fields, it will produce a single document for each record selected from the database. This is the default setting.

Repeating Document

Lets you repeat the same document as many times as needed. The document will cycle through prompts as many times as desired to produce a separate document for each cycle.

A Repeating Document is also desirable when there are no database fields in your document.

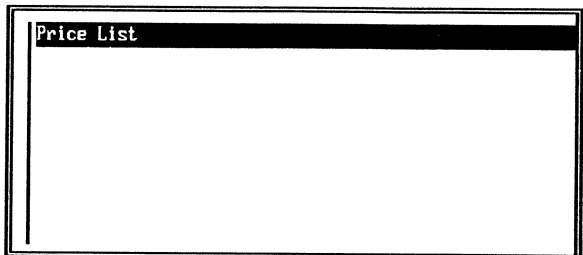
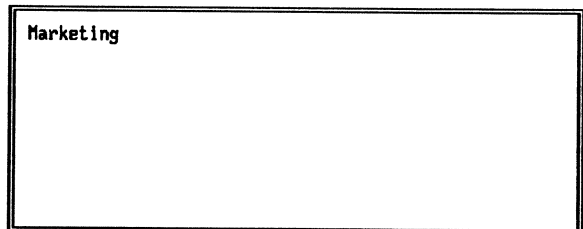
List Fields and Global prompts will not repeat. If your document contains these, the cycle for a Repeating Document would be as follows:

- 1 - Document selected
- 2 - List Fields resolved
- 3 - Global prompts resolved
- 4 - Record selected from database
- 5 - Per Letter prompts
- 6 - Option to repeat step 5
- 7 - Return to step 4 until complete

Select **Repeating** or **Single Document**.

5 Press **Esc** or **Exit (F7)**.

Perfect Complement adds the new document to the Library. The document description appears in alphabetical order within the Class or SubClass menu.

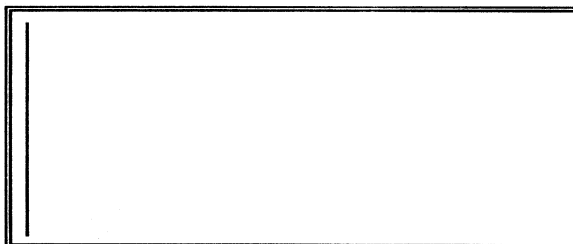
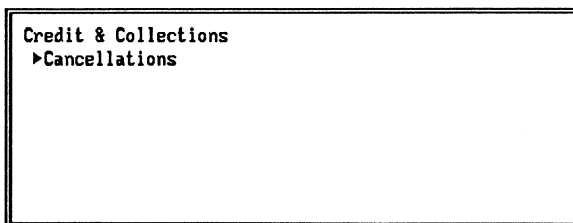


***NOTE!** After adding a new document, you should use the Document Information function to check for Undefined Field Names. (See Resolving Undefined Field Names on page 114.)*

ADDING A DOCUMENT TO A SUBCLASS

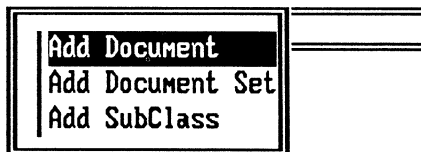
To *add* a document to a **SubClass**:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu. A list of the current Classes appears.
- 3 Select the desired **Class**. A list of the current SubClasses and Documents appears.
- 4 Select the SubClass you want to add a document to and press **Enter**. A blank list with the SubClass name appears.



- 5 Press **Insert**. The ADD menu appears.

Select **Add Document**.



6 The **ADD DOCUMENT** Data Entry Form appears.

Credit & Collections ▶Cancellations	
Add Document	
Document Desc.	██
WordPerfect File	C:\DEMO\
Author	you
Merge to	Printer
Instructions	
Automatic Selection	Disable
Database	
Selection Criteria	
Document Control	Single Document

Document Desc.

Type a clear description of the document. This description appears in Perfect Complement menus.

WordPerfect File

Provide the full drive, path, and file name of the WordPerfect file.

Perfect Complement defaults to the current drive and directory.

To add the file name, press **Shift-F10 (Retrieve)**. The cursor will be at the end of the default information. Type the file name.

***NOTE:** You may also press **F5** then **Enter** to display a list of the files in your WordPerfect directory. Highlight the appropriate file and press **Enter**.*

Author

Provide the name of the document's author.

Perfect Complement defaults to the User ID initials.

Merge to

When Perfect Complement generates your document it can instruct WordPerfect to merge to the Screen, the Printer, or directly to a Fax machine.

Credit & Collections	
>Cancellations	

Add Document	
Document Desc.	Notice Of Cancellation
WordPerfect File	C:\DEMO\CANCEL.MTC
Author	you
Merge to	Printer
Instructions	
Automatic Selection	Disable
Database	
Selection Criteria	
Document Control	Single Document

Merge to

Fax

Printer

Screen

Fax

Allows you to send the merged document(s) directly to a fax board for transmission. (See *Fax Merge* on page A18 of the Appendix.)

Printer

Allows you to merge documents directly to the printer.

Screen

Allows you to view the merged document before sending it to the printer or saving it to disk. See your WordPerfect manual for memory considerations when merging to the Screen.

Instructions

You can enter instructions that will appear on the screen during generation. These instructions are for the **user only** and do not appear on the printed document. For example, you could enter a reminder to "Include Application Form," or "Send Copy of Monthly Report," etc.

IF YOU DO NOT WANT TO ENTER INSTRUCTIONS, PRESS THE DOWN ARROW KEY TO MOVE TO THE NEXT FIELD.

To enter instructions:

Press **Enter**. An Instruction entry window will appear.

Enter the instructions. Press **Esc** or **Exit (F7)**.

A prompt will ask "Save changes? Yes/No." Select **Yes** to save the instructions. Select **No** to exit the Instructions window without saving.

Automatic Selection

The Automatic Selection feature lets you "assign" a Selection Criteria to a document. Whenever the document is generated, it will use the assigned Selection Criteria to automatically select name and address records for printing.

If you want to use the Automatic Selection feature, refer to page 177 for instructions.

If you **do not** want to use the Automatic Selection feature, press **Enter** to move the Document Control field.

Document Control

Press **Enter**. The Document Control menu appears.

Single Document

The document will cycle through prompts one time to produce a single document.

Repeating Document

Lets you repeat the same document as many times as needed. The document will cycle through prompts as many times as desired to produce a separate document for each cycle.

A Repeating Document is also desirable when there are no database fields in your document.

List Fields and Global prompts will not repeat. If your document contains these, the cycle for a Repeating Document would be as follows:

- 1 - Document selected
- 2 - List Fields resolved
- 3 - Global prompts resolved
- 4 - Record selected from database
- 5 - Per Letter prompts
- 6 - Option to repeat step 5
- 7 - Return to step 4 until complete

Select **Repeating** or **Single Document**.

7 Press Esc or Exit (F7).

The document is now added to the SubClass. The document description appears in alphabetical order within the SubClass/Documents menu.

Repeat steps 4-7 for each document you want added to this SubClass. Start with step 1 on page 91 if you want to add documents to another SubClass.

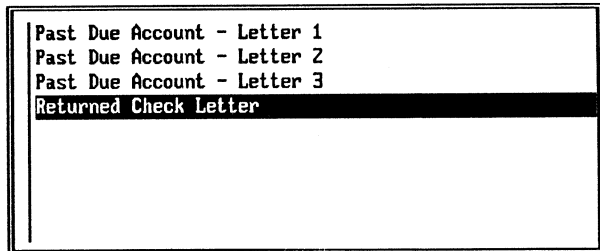
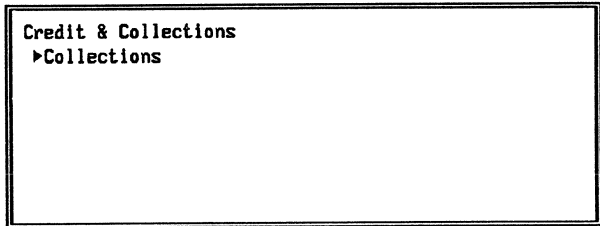
***NOTE!** After adding a new document, you should **VIEW** the Document Information to check for undefined Field Names. (See **Viewing Document Information** below.)*

**VIEWING/CHANGING
DOCUMENT
INFORMATION**

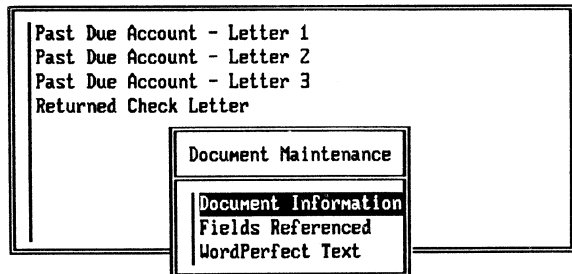
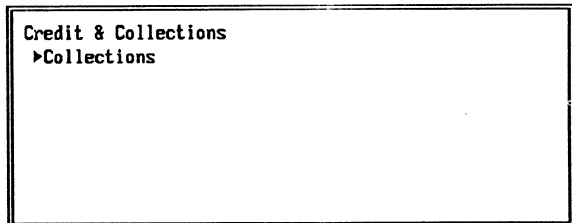
Perfect Complement allows you to view or change information about a document stored in the Library. To *view or change* document information:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.

- 3 Select the desired **Class** and **SubClass**, if any, from the Document Class menu.



- 4 Select the desired **Document Description**. The Document Maintenance menu appears.



An error message will appear for a document with Unresolved Field Names. This is just a warning. If this happens, press **Esc** to continue. (See *Resolving Undefined Field Names on page 114.*)

- 5 Select **Document Information** to view or change the document Data Entry Form.

```
Credit & Collections
>Collections

Change Document

Document Desc.  Returned Check Letter
WordPerfect File C:\DEMO\BADCHECK.LTR
Author         you
Merge to       Printer
Instructions

Automatic Selection  Disable
Database Selection Criteria

Document Control    Single Document
```

The **CHANGE DOCUMENT** Data Entry Form appears. You can view or change any field of the document information.

Press **Esc** or **Exit** to return to the Document Maintenance menu.

- 6 Select **Fields Referenced** to view a list of Field Names in the document. If you have undefined Field Names, press **Ins (Insert)** to see a list of them. (See *Resolving Undefined Field Names on page 114.*)

Credit & Collections
 ▶Collections

Fields Referenced	
Address1	
Address 2	
Check Amount	Enter dollar amount of returned check:
Check Number	Enter Number of returned check:
City	
Company	
Credit Manager	Credit Manager's Name
Name	

Press **Esc** or **Exit** to return to the menu.

- 7 Select **WordPerfect Text** to view the document in the WordPerfect file. You can use the arrow keys or Page Up/Page Down keys to view the entire document.

```

January 18, 1998

[Company]
[Name]
[Address1]
[Address2?]
[City], [State] [Zip Code]

Dear [Salutation]:

We received your check number [Check Number] in the amount of $[Check
Amount]. However, [Reason Returned]

Sincerely,

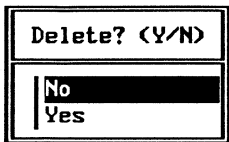
[Credit Manager]
Credit Manager
  
```

NOTE: You must use WordPerfect to make any changes to the document.

Press **Esc** or **Exit** to return to the menu.

- 8 Press **Esc** or **Exit** to return to the document's Class menu.

REMOVING A DOCUMENT



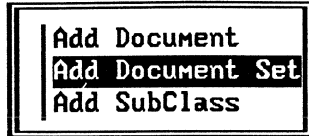
You can remove a document that is no longer needed from the Library. This will **NOT** erase the WordPerfect file. It will **NOT** remove Field Names referenced by the document.

To *remove* a document from the Library:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 Select the document's **Class and SubClass**, if applicable.
- 4 Highlight the **Document Description** and press **Del (Delete)**.
- 5 A "Delete? Y/N" menu will appear. Select your response and press **Enter**.

Perfect Complement will remove the document information from the Library. If you want to delete the file that contains the actual document, you must use WordPerfect.

DOCUMENT SETS



A **Document Set** allows you to "link" documents together so that they are generated as a group. For example, each time you acquire a new account you need a cover letter, a contract, and an envelope to mail to the client. You have these Standard Documents in the Library, but you would like to generate them consecutively as a group instead of individually. This is why Perfect Complement has the Document Set feature. All you do is select the documents you want included in the Set and provide a description of the Set.

There is no limit to the number of Document Sets you can add to the Library, or the number of documents you can include in a Set. You are limited only by the amount of memory on your computer.

NOTE: The documents do not have to be selected in order. You can select them in any order and then arrange them in their proper sequence.

A Document Set can be placed in any Class or SubClass. A \equiv symbol is used to distinguish a Document Set from the other contents of the Class or SubClass.

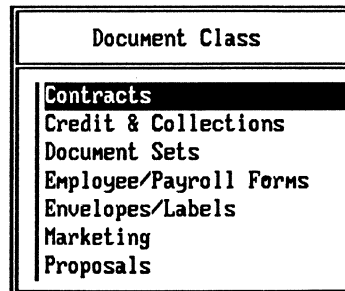
ADDING A DOCUMENT SET

When you add a Document Set, you will mark the documents you want included in the Set, then retrieve them into the desired Class or SubClass. You can mark the documents in any order and then arrange them in proper sequence, or you can mark them in the order you want them in the Set. If documents are contained in the same Class or SubClass, you can mark them all while you are in that Class or SubClass.

If you want to create a separate Class or SubClass for the Document Sets, do so now. (*See Adding A Document Class on page 77, or Adding A SubClass on page 80.*) If you want to add the Document Set to an existing Class or SubClass, proceed to step 1 below.

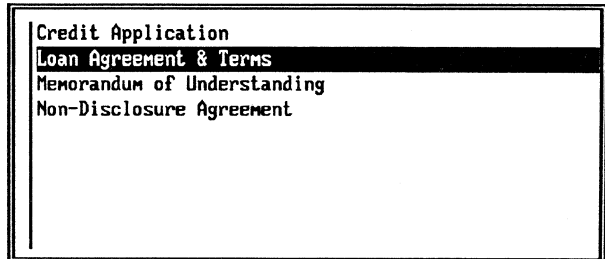
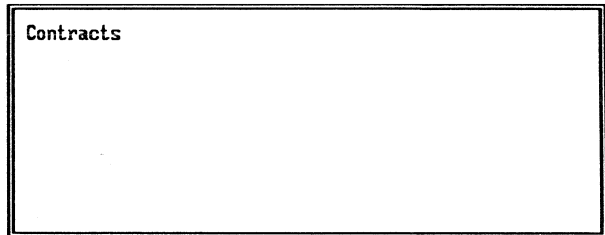
To *add* a Document Set:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 Select the **Class and SubClass**, if any, that contains the first document you want in the Document Set.



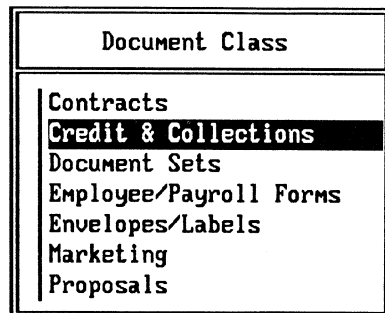
- 4 Highlight the desired **document**. Press **Mark (Alt-F5)**. The line will "flash," indicating it has been selected.

If this Class/SubClass contains other documents you want in this Document Set, you can mark them now, if desired. If not, proceed to step 5.



- 5 Press **ESC** or **Exit (F7)**.

- 6 Select the **Class and SubClass**, if any, that contains the next document you want in the Document Set.



7 Highlight the desired **document**. Press **Mark (Alt-F5)**. The line will "flash," indicating it has been selected. If this Class/SubClass contains other documents you want in this Document Set, you can mark them now, if desired. If not, proceed to step 8.

```
Credit & Collections
  ▶Credit
```

```
Credit Information Request
New Account Cover Letter
Payment Terms Agreement
Request For Tax Exempt Verification
```

8 Repeat steps 6 & 7 for each remaining document you want included in the Document Set.

```
Document Class
Contracts
Credit & Collections
Document Sets
Employee/Payroll Forms
Envelopes/Labels
Marketing
Proposals
```

```
Envelopes/Labels
```

```
Envelope - Legal Size
Labels - 2 columns, 7 labels per
Rolodex Card
```

- 9 Press **Esc** or **Exit (F7)** until you return to the Document Class list.
- 10 Select the **Class** and **SubClass**, if any, that you want to add the Document Set to.

Document Class
Contracts
Credit & Collections
Document Sets
Employee/Payroll Forms
Envelopes/Labels
Marketing
Proposals

Document Sets

Credit & Collections	▶
Legal	▶
Marketing	▶
Personnel	▶

- 11 Press **Ins (Insert)**. The **ADD** menu appears. Select **Add Document Set**.

Document Sets	▶Credit & Collections
---------------	-----------------------

	<table border="1"> <tbody> <tr> <td>Add Document</td> </tr> <tr> <td>Add Document Set</td> </tr> <tr> <td>Add SubClass</td> </tr> </tbody> </table>	Add Document	Add Document Set	Add SubClass	
Add Document					
Add Document Set					
Add SubClass					

- 12 A Document Set description prompt appears. Type a description of the Document Set.

Document Set New Account Cover Letter, Loan Terms w/Envelope

- 13 Press **Enter**. The Document Set description you entered appears on the menu. A ≡ symbol denotes a Document Set. It will appear to the right of the Document Set description.

Document Sets
▶Credit & Collections

New Account Cover Letter, Loan Terms w/Envelope ≡

You can now arrange the documents in their proper order, if necessary. If the documents do not need to be arranged, proceed to step 19. If you need to arrange their order, proceed to step 14.

- 14 With the Document Set description highlighted, press **Enter**. The Document Maintenance menu appears. Select **View Document Set**. A list of the marked documents appears.

```
Document Sets
▶Credit & Collections
  ▶New Account Cover Letter, Loan Terms w/Envelope
```

```
New Account Cover Letter
Envelope - Legal Size
Payment Terms Agreement
End of Set
```

NOTE: When arranging documents in a Document Set:

Enter = Cut

Insert = Paste

Del = Delete

- 15 To arrange the documents in order, highlight a document and press **Enter**.

```
Document Sets
>Credit & Collections
  >New Account Cover Letter, Loan Terms w/Envelope
```

```
New Account Cover Letter
Envelope - Legal Size
Payment Terms Agreement
End of Set
```

The document will be "cut" from the list. When retrieved, the cut document will be inserted on the line **above** the highlighted bar.

- 16 Position the highlighted bar below the line where you want the document inserted.

```
Document Sets
>Credit & Collections
  >New Account Cover Letter, Loan Terms w/Envelope
```

```
New Account Cover Letter
Envelope - Legal Size
End of Set
```


- 17 Press **Ins (Insert)**. The document will be inserted in the selected position.

```
Document Sets
▶Credit & Collections
  ▶New Account Cover Letter, Loan Terms w/Envelope
```

```
New Account Cover Letter
Payment Terms Agreement
Envelope - Legal Size
End of Set
```

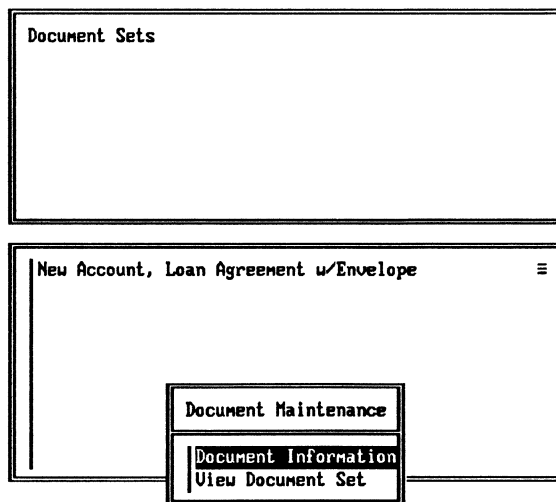
- 18 Repeat steps 15 through 17 for each document you want to move.
- 19 Press **Esc** or **Exit (F7)** until you return to the Main Menu.

**CHANGING
DOCUMENT SET
INFORMATION**

Document Information on the Document Maintenance menu will display the current settings for the Document Set. You may change these settings, if desired.

To *change* Document Set information:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.
- 3 Select the Class and SubClass, if any, that contains the Document Set.
- 4 Select the Document Set you want to change. The Document Maintenance menu appears.



- 5 Select **Document Information**. The **CHANGE DOCUMENT** Data Entry Form appears.

Document Sets

Change Document

Document Set **New Account, Loan Agreement w/Envelope**

Author Sue

Merge to Screen

Instructions

Automatic Selection Disable

Database name

Description

Document Control Single Document

- 6 Highlight the field you want to change and make your corrections.
- 7 Press **Esc** or **Exit (F7)** when through.

CHANGING/VIEWING/ DELETING DOCUMENT SET CONTENTS

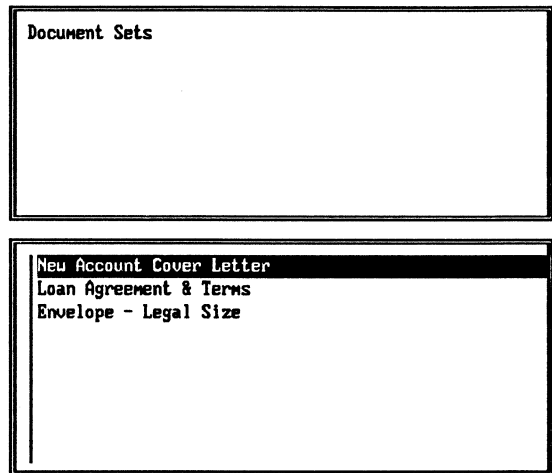
The **View Document Set** mode of the Document Maintenance menu allows you to:

- View the documents in a Set
- Change the order of the documents
- Delete documents from the Set

To *view, change or delete* the contents of a Document Set:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Standard Documents** from the Library Maintenance menu.

- 3 Select the **Class and SubClass**, if any, that contains the Document Set.
- 4 Select the **Document Set** you want to view. The Document Maintenance menu appears.
- 5 Select **View Document Set**. A list of documents contained in the Document Set appears.



To *delete* a document from the Set, highlight the document and press **Del (Delete)**.

To *change* the order of the documents:

- Highlight the document you want to move.
- Press **Enter**. The document will be "cut" from the list.
- Position the highlighted bar **under** the line where you want the cut document to be inserted.

- Press **Ins (Insert)** to retrieve the cut document.
- Repeat these steps for each document you want to move.

6 Press Esc or Exit (F7) when through.

RESOLVING UNDEFINED FIELD NAMES

When you add a new document, you may get an error message saying there are undefined fields. This means that a [Field Name] in your Standard Document is not defined in the Library. Undefined fields may also occur when you make changes to the WordPerfect file or perform Library Maintenance on fields.

LOCATING UNDEFINED FIELD NAMES

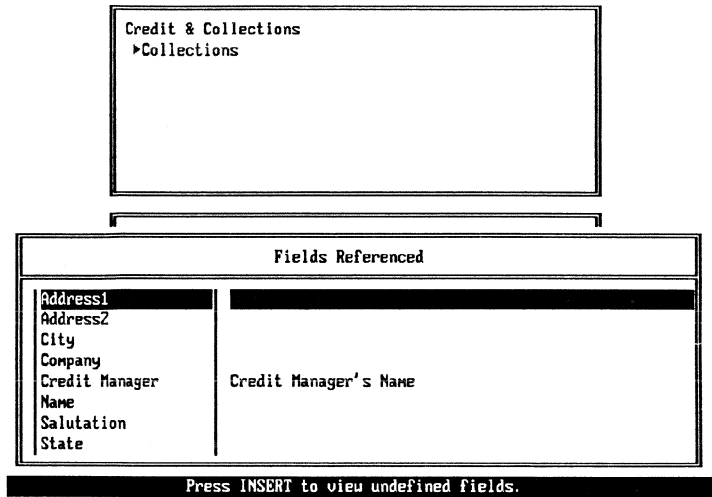
You will find the source of your undefined field problem either in the WordPerfect document file or in the Library.

You can check the document file in WordPerfect or by selecting **WordPerfect Text** from the Document Maintenance menu. (*See Viewing Document Information on page 96.*)

Check for a misspelled [Field Name]. Remember that Perfect Complement is case sensitive ("A" is not equal to "a"). Another common mistake is to use a hyphen in the field name. WordPerfect actually inserts a special control character in the document when you type a hyphen (-). Correct any problems you find in the document file by using WordPerfect.

If you have not found a problem in the document, Perfect Complement has probably found Field Names that are not in the Library.

Perfect Complement provides an interactive way to resolve undefined field names.

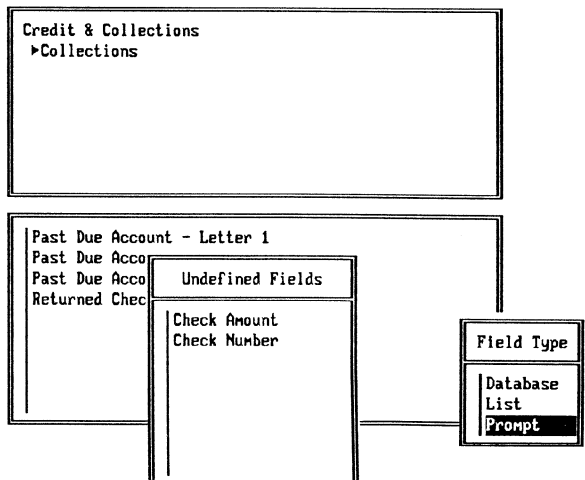


Perfect Complement provides an interactive way to resolve undefined Field Names. Select **Fields Referenced** from the Document Maintenance menu. When there are undefined fields, pressing **Ins (Insert)** will display the **Undefined Fields** menu.

USING THE UNDEFINED FIELDS MENU

To *add* [Field Name] entries to the Library from the Undefined Fields menu:

- 1 Select the **Field Name**. The Field Type menu appears.



- 2 Select the **Field Type**. If you are unsure about the Field Type, see *Field Names* on page 63.

Perfect Complement places you in the ADD mode for the Field Type you selected.

See:

ADDING A DATABASE FIELD on page 134.

ADDING A PROMPT FIELD on page 141.

ADDING A LIST FIELD on page 150.

When you exit from the ADD mode, you will return to the Undefined Fields menu until all the Field Names are resolved or you press **Esc** or **Exit (F7)**.

- 3 Repeat steps 1 and 2 until all Field Names are resolved.

EXTERNAL DATABASE

dBASE
LOTUS 1-2-3
PARADOX
R:BASE

...

Perfect Complement reads files created by most popular database and spreadsheet software. You will need to make a one time entry in the Library to tell Perfect Complement the database type and location. We call this an **External Database Reference**. Perfect Complement automatically adds all database fields to the Library. You can change the Perfect Complement Field Name if desired.

Perfect Complement opens database files in Read-Only mode. This means you do not have to worry about accidentally changing your database. If you are running on a network server, Perfect Complement will run with other programs which share the database file.

Special instructions for Lotus 1-2-3 can be found on page 122.

ADDING AN EXTERNAL DATABASE

You will need to add an External Database Reference to the Library before you use its Database Fields in a document.

To *add* an External Database entry to the Library:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **External Database** from the Library Maintenance menu.
- 3 With the External Database menu displayed, press **Ins (Insert)**.

The EXTERNAL DATABASE Data Entry Form appears.

External Database	
Customer Houses for Sale Travel	

External Database	
Database name	Hotels
Database type	
Database Location	C:\DEMO\
Description	

Database Name

Type a name you will use for the database. This does not have to be the same name as the database file. The name appears in Perfect Complement menus.

For example, the database file may be CUSMAST. The Database Name used in the Perfect Complement menus could be "Customer Master."

Database Type

When you select this field, a menu appears. This menu is a list of database and spreadsheet products supported by Perfect Complement.

Select the product name used to create your database file.

External Database		External Database	
Customer Houses for Sale Travel		Database type	
External Database		dBASE III / IV	
Database name	Hotels	Lotus 1-2-3 Ver. 1a	
Database type		Lotus 1-2-3 Ver. 2.0	
Database Location	C:\DEMO\	Lotus Spreadsheet Ver. 1a	
Description	Hotels	Lotus Spreadsheet Ver. 2.0	
		Paradox Ver. 2.0 / 3.0	
		R:BASE	
		Symphony Ver. 1.2	

NOTE: Be certain that you select the correct version if more than one appear on the menu.

Database Location

Enter the **disk drive, directory and name** of the database file. The three character file extension (.DBF, .WKS, .WK1, etc.) is not required.

Example:

C:\123\REALTY
C:\DB\CLIENTS
C:\PRDX\TENANTS

Field Description

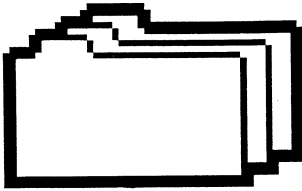
This field is for your information only. It defaults to the Database Name, but you may enter any description you like to help identify the field.

Table (*RBASE databases only!)

Press **Enter**. A list of Tables in the database appears. Select the desired Table.

Press **ESC** or **Exit (F7)** to complete the Data Entry Form.

FILING SEQUENCE



- 4 The **Select Filing Sequence Field** menu appears. This is a list of the fields in the database file.

Select Filing Sequence Field
LOCATION
ISLAND
CITY
HOTEL_NAME
SINGLE
DOUBLE
PHONE
SEASON_BGN
SEASON_END
↓ RSRV_RECQRD

When you work with the database, Perfect Complement displays a list of records. It will use the field you select here to display the records in a convenient sequence. This field will also appear as the first field in the list. Usually, you will use something unique like "last name" as the Filing Sequence Field.

Select the **field** you want as the Filing Sequence Field.

NOTE: Don't worry about choosing the wrong field. You can always come back later and select a better field.

MENU DISPLAY FIELDS

- 5 The **Select Menu Display Fields** menu appears. This is a list of the fields in the database file. It does not include the field you selected as the Filing Sequence Field.

The database records menu will include the Filing Sequence Field plus the fields you select from this list. If you select a field like LAST NAME as the Filing Sequence Field, you might choose FIRST NAME and PHONE# as additional fields in the menu display.

Select Menu Display Fields
LOCATION
CITY
SINGLE
DOUBLE
PHONE
SEASON_BGN
SEASON_END
RSRU_REQD
GOLF
TENNIS

HOTEL_NAME ISLAND

Select a **field**.

Each time you select a field it is removed from the list. You may repeat this until you have selected all the fields you want. If you select a field that will not fit in the display, you will get an error message.

6 Press **Esc** or **Exit (F7)** to signal completion.

Perfect Complement adds the External Database reference information to the Library. The database name now appears in the list on the External Database menu.

All the field names are also added to the Library. You may change the [Field Name], if desired. (*See Changing A Database Field Entry on page 138.*)

ADDING A LOTUS 1-2-3 EXTERNAL DATABASE

Perfect Complement lets you merge information from a Lotus 1-2-3 file in two ways:

- as a Lotus database file, or
- as cells and ranges in a Lotus spreadsheet

The data in a Lotus 1-2-3 worksheet must be organized in a certain way.

- All entries in a single row make up one record; a record being information about one item in the database.
- Each record in a database has the same fields. Each column in the database comprises one field.
- Each cell in the first row of a database contains a label (i.e. field name), that identifies the information in the column. The remainder of rows contain records.

Any data that you put into records and fields can constitute a 1-2-3 database. When creating a database:

- Do not leave blank rows or dividing lines between field names or records.
- Fields can only consist of labels or numeric data. You cannot mix values and labels in a single field.
- You can have up to 256 fields in one database.

Below is an example of how a Lotus database should appear.

	A	B	C	D	E	F
1	NAME	ADDRESS 1	ADDRESS 2	CITY	STATE	ZIP CODE
2	Thomas Welman	101 Monroe St.	Suite 28	New York	NY	20938
3	Susan Carroll	398 Winston St.	Suite 12A	Anaheim	CA	10036
4	Steven Hardin	2900 First Ave.		Baltimore	MD	21234
5	Robert Winger	810 Dumont Lane	Room 39	Miami	FL	49838
6	Linda Brett	76 Eastwood Rd.	Suite 18	Nashville	TN	87622
7	Harold Dalton	655 Hyde Ave.	35th Floor	Dallas	TX	30922
8	George Altman	702 Sycamore		Richmond	VA	25235
9	Edward Ronson	189 Spartan St.	Suite 6	Chicago	IL	90082
10	Guy Sutherland	54 Reed St.	Suite 34	Atlanta	GA	76366
11	William Roby	9382 Harlan Ave.		Oakland	CA	87277
12	Rita Brown	290 Sixth St.	3rd Floor	Wheeling	WV	21982

To merge data from Lotus 1-2-3:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **External Database** from the Library Maintenance menu.
- 3 With the External Database menu displayed, press **Ins (Insert)**.

The **EXTERNAL DATABASE** Data Entry Form appears.

Database Name

Type a name you will use for the Lotus database. This does not have to be the same name as the database file. The name appears in Perfect Complement menus. Press **Enter** when through.

External Database	
Database name	Sales
Database type	
Database Location	C:\123\
Description	

Database Type

Press **Enter**. A list of the available database and spreadsheet products supported by Perfect Complement appears.

To merge a *database file*, select **Lotus 1-2-3 Ver. 1a** or **2**, depending upon the version used to create the file.

To merge a *specific cell or range*, select **Lotus 1-2-3 Spreadsheet Ver. 1a** or **2.0**, depending upon the version used to create the file.

External Database	
Database name	Sales
Database type	Lotus 1-2-3 Ver. 2.0
Database Location	C:\123\
Description	Sales

Database type
dBASE III / IV
Paradox Ver. 2.0 / 3.0
R:BASE
Symphony Ver. 1.2
Lotus 1-2-3 Ver. 1a
Lotus 1-2-3 Ver. 2.0
Lotus Spreadsheet Ver. 1a
Lotus Spreadsheet Ver. 2.0

Database Location

Enter the **disk drive, directory and name** of the Lotus database file. The three character file extension (.WKS or .WK1) is not required.

Description

This field is for your information only. It defaults to the Database Name, but you may enter any description you like to help identify the field.

External Database	
Customer	
Houses For Sale	
Travel	

External Database	
Database name	Sales
Database type	Lotus 1-2-3 Ver. 2.0
Database Location	C:\123\SALES
Description	Monthly Sales

4 Press Esc or Exit (F7).

If you selected **Lotus Spreadsheet** to merge a specific cell or range, proceed to *To Merge A Specific Cell or Range* on page 126.

If you selected **Lotus Ver1.a** or **2.0** to merge an entire database file, proceed with this step as follows below.

The **Select Filing Sequence Field** menu appears. This is a list of the fields in the database file.

When you work with the database, Perfect Complement displays a list of records. It will use the field you select here to display the records in a convenient sequence. This field will also appear as the first field in the list. Usually, you will use something unique like "Last Name" as the Filing Sequence Field.

Select the **field** you want as the Filing Sequence Field.

NOTE: Don't worry about choosing the wrong field. You can always come back later and select a better field.

- 5 The Select Menu Display Fields** menu appears. This is a list of the fields in the database file. It does not include the field you selected as the Filing Sequence Field.

The database records menu will include the Filing Sequence Field plus the fields you select from this list.

- 6 Press Esc or Exit (F7)** to complete the Lotus database reference and add it to the Library.

A Database Field entry is made in the Library for each field (i.e. column heading) in the Lotus file. If you want to change the Field Name, see *Changing A Database Field Entry* on page 138.

To merge a *specific cell or range*:

- 1** You must have completed steps 1 through 4 of **To Merge Data From Lotus 1-2-3** starting on page 123.
- 2** From the Library Maintenance menu, select **Database Fields**.

- 3 Press **Ins (Insert)**. Use the up arrow to highlight **Field Name**.

Type the **Field Name** you want to use for the cell or range. Press **Enter** when through.

Database Fields	
Account No.	: Clients
Address1	: Clients
Address1	: Employee
Address1	: Vendors
Address2	: Clients
Address2	: Employee

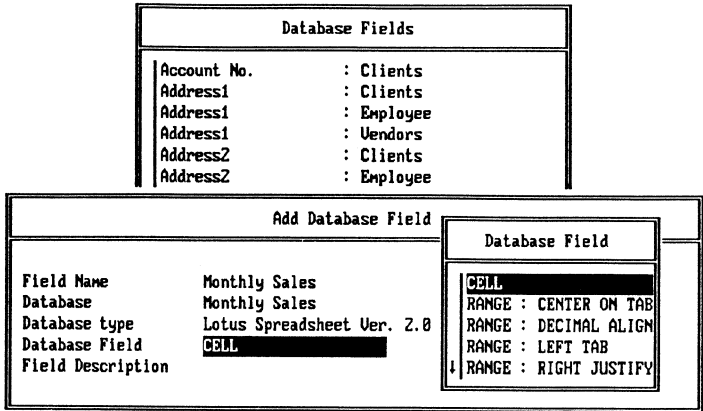
Add Database Field	
Field Name	Monthly Sales
Database	
Database type	
Database Field	
Field Description	

- 4 Press **Enter**. A list of the **External Database/Name & Address Files** appears. Select the desired Lotus database file.

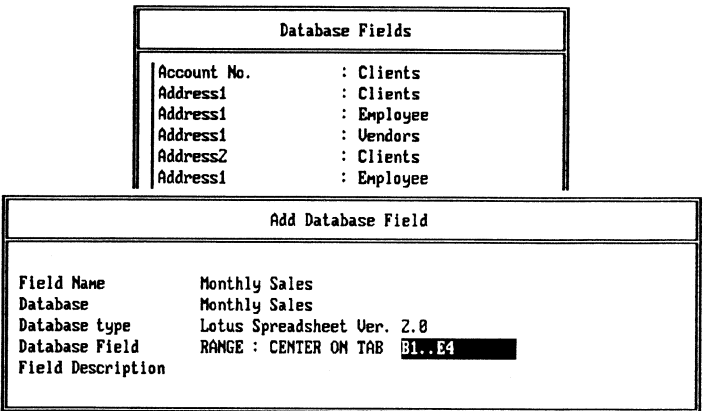
Database Fields	
Account No.	: Clients
Address1	: Clients
Address1	: Employee
Address1	: Vendors
Address2	: Clients
Address2	: Employee

Database	
Field Name	Mont
Database	Customer
Database type	Hotels
Database Field	Monthly Sales
Field Description	Travel

- The Database Field menu appears. Select **Cell or Range**. If selecting **Range**, choose the desired format.



- A highlighted bar will appear to the right of the Database Field. Type the desired **Cell or Range**. A Range, for example, should be entered as follows: **A1..D4**



- The Cell or Range you entered will appear as the default entry for Field Description. If you want to change this description, press the down arrow key to highlight Field Description. Type the description, then press **Enter**.

- 8 Press **Esc** or **Exit (F7)** to complete the Data Entry Form.

Repeat steps 1-8 for each Cell or Range that you want to define with a Field Name. When the [Field Name] is placed in the Standard Document, the data from the Lotus file will be inserted into the document.

VIEWING EXTERNAL DATABASE INFORMATION

To *view* External Database information:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **External Database** from the Library Maintenance menu.
- 3 Select the **database name**. The **EXTERNAL DATABASE** Data Entry Form appears with the current information.
- 4 Press **Esc** or **Exit (F7)** to return to the menu.

CHANGING AN EXTERNAL DATABASE

The only time you should need to change an External Database reference is if you change its location.

If new fields are added to an External Database, they can be added to the Perfect Complement Library using Database Fields maintenance.

CHANGING THE DATABASE NAME FIELD

If you make a change to the Database Name field, all fields are deleted and automatically added back with the default field name.

CHANGING THE DATABASE TYPE FIELD

If you convert your database file to a different version of the software, you may need to change Database Type information.

CHANGING EXTERNAL DATABASE INFORMATION

To make *changes* to an External Database reference in the Library:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **External Database** from the Library Maintenance menu.
- 3 Highlight the database name you want to change and press **Retrieve (Shift-F10)**. The **EXTERNAL DATABASE** Data Entry Form appears with the current information.
- 4 Select the **field** you want to change.
- 5 Select or type your changes.
- 6 Press **Esc** or **Exit (F7)** to save your changes and return to the menu.

REMOVING AN EXTERNAL DATABASE ENTRY

You can remove an External Database entry from the Library when it is no longer needed. This will **NOT** erase the database file or affect your database in any way.

To *remove* an External Database entry:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **External Database** from the Library Maintenance menu.

- 3 Highlight the **database name** and press **Del (Delete)**. A "Delete? Y/N" menu will appear.
- 4 Select **Yes**.
- 5 Press **Esc** or **Exit (F7)**.

Perfect Complement will remove the External Database entry from the Library and delete all Database Field entries.

DATABASE FIELDS

[Company]
[Name]
[Title]
[Address1]
[Address2]
[City], [State]

A **Database Field** entry links a [Field Name] with information contained in a database file. Perfect Complement replaces the [Field Name] in your document with the database information. The database may be an External Database or a Perfect Complement Name & Address File.

August 16, 1988

[Company]
[Name]
[Address1]
[Address2?]
[City], [State] [Zip Code]

Dear [Salutation],

We received your check number [Check Number] in the amount of \$[Check Amount]. However, [Reason Returned]

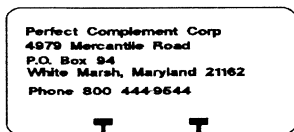
Sincerely,

[Credit Manager]
Credit Manager

When you define an External Database reference, Perfect Complement automatically adds all field names in that database to the Library. You can change the Field Name that will be used by Perfect Complement (the Field Name you would use in Standard Documents), if desired. See *Changing A Database Field Entry* on page 138.

You can use the same Database [Field Name] in different database files. You do not have to distinguish one file's [Fields] from another. The Database Fields menu will list each occurrence of the [Field Name] with the corresponding database file.

NAME & ADDRESS FILE FIELDS



Perfect Complement automatically maintains **Database Field** entries for Name & Address Files. The Library contains the basic fields provided by Perfect Complement when it is installed. As you add User Defined Fields, Perfect Complement inserts the Database Field entries for you. If you remove a User Defined Field, Perfect Complement removes the Database Field entry from the Library.

EXTERNAL DATABASE FIELDS

dBASE III
LOTUS 1-2-3
PARADOX
R:BASE
...

When you add an External Database reference, Perfect Complement automatically adds all fields contained in that database file or table to the Library. (*See Adding an External Database Reference on page 117.*)

You may want to modify a database field . . .

- to clarify the Field Name. Often database fields are not readable. If you want to change the [Field Name] to something other than what is used in the database, you can do so. For example, CUS_NUM could be changed to [Customer Number].

- for security reasons. If some database fields contain confidential information and should not be seen by the User, you may want to delete it from the Perfect Complement Library.
- to make certain field names the same, such as Name. For example, the Name field might be called CUSTNAME in the Customer database file and VENDNAME in the Vendors database file. In Perfect Complement, you can call both fields [Name] so you would not have to create separate documents for each database's field names.
- if new fields have been added to the fields for an existing External Database reference.
- if a change has been made in the database causing a field to be deleted or renamed. You do not need to do anything if a Field Type or Length has changed.

ADDING A DATABASE FIELD ENTRY

When the External Database reference was defined, all of its database fields were automatically added to the Library. If, however, you need to add a database field to the Library, follow the steps below.

To *add* a Database Field:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Database Fields** from the Library Maintenance menu.

The Database Fields menu appears. The field names are listed in alphabetical order with the name of the database where each can be found.

Database Fields	
Account No.	: Clients
Address1	: Clients
Address1	: Employee
Address1	: Vendors
Address2	: Clients
Address2	: Employee
Address2	: Vendors
City	: Clients
City	: Employee
↓ City	: Vendors

3 Press Ins (Insert).

The ADD DATABASE FIELD Data Entry Form appears.

Database Fields	
Account No.	: Clients
Address1	: Clients
Address1	: Employee
Address1	: Vendors
Address2	: Clients
Address2	: Employee

Add Database Field	
Field Name	Season Begin Date
Database	
Database type	
Database Field	
Field Description	

Field Name

Type the name you will use as the [Field Name] in your Standard Documents. You may use upper and lower case letters, and numbers.

NOTE: There is a limit of 20 characters per Field Name, including spaces but not including the brackets.

DO NOT USE ! ? [] OR - IN THE NAME.

The [Field Name] does not have to be the same as the name used in the External Database. For example, a programmer may have called a field in your database CUST_ID. You may commonly refer to this as the Customer Number. Make the Field Name [Customer Number].

Database

Select the External Database from the menu. If you do not see the database name in the list, you must add the External Database reference before you can continue.

Database Fields	
Account No.	: Clients
Address1	: Clients
Address1	: Employee
Address1	: Vendors
Address2	: Clients
Address2	: Employee

Add Database Field	
Field Name	Season Begin Date
Database	
Database type	
Database Field	
Field Description	

Database name
Customer
Hotels
Houses For Sale
Travel

Database Type

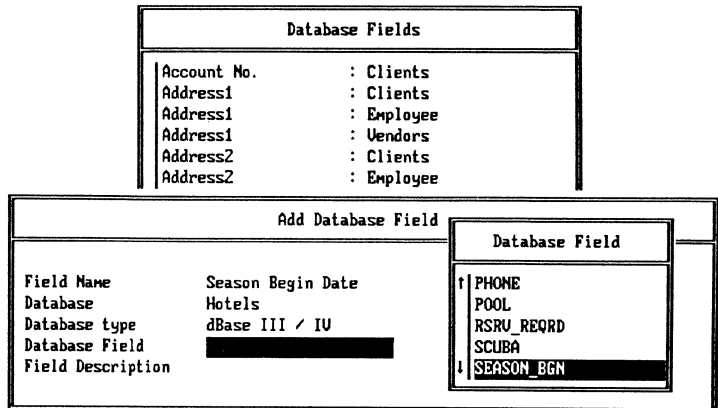
This field appears for your information.

Database Field

Select the field which contains the information for [Field Name]. The list of names comes from the names used in the External Database.

In a spreadsheet type database, such as Lotus 1-2-3, the names displayed are the column headings.

NOTE! If you are unsure about the field, go ahead and take a guess. You can always come back and try again after you test your document.



Field Description

Type a description of the field. This field is optional. The description appears in some Perfect Complement menus.

4 Press Esc or Exit.

Perfect Complement adds the Database Field entry to the Library. The Field Name appears in alphabetical order within the Database Fields menu.

VIEWING A DATABASE FIELD ENTRY

To *view* Database Field information:

- 1 Select **Database Fields** from the Library Maintenance menu. The Database Fields menu appears.

- 2 Select the **Database Field**. The **VIEW DATABASE FIELD** form appears with the current information.
- 3 Press **Esc** or **Exit** to return to the Database Fields menu.

CHANGING A DATABASE FIELD ENTRY

To *change* Database Field information:

- 1 Select **Database Fields** from the Library Maintenance menu.

The Database Fields menu appears.

- 2 Highlight the Database Field and press **Retrieve (Shift-F10)**. The **CHANGE DATABASE FIELD** form appears with the current information.
- 3 Select the **field** you want to change.
- 4 Select or type your changes.
- 5 Press **Esc** or **Exit** to save your changes and return to the menu.

REMOVING A DATABASE FIELD ENTRY

You can remove a Database Field entry from the Library when it is no longer needed, or if you wish to protect the contents from being used in a document. This will **NOT** remove the field from your database or affect your database in any way!

To *remove* a Database Field entry:

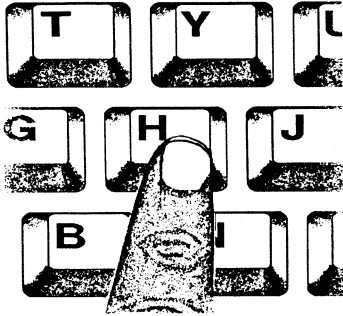
- 1 Select **Database Fields** from the Library Maintenance menu. The Database Fields menu appears.

2 Highlight the Database Field and press **Del** (**Delete**).

3 A "Delete? Y/N" menu will appear. Select your response and press **Enter**.

Perfect Complement will remove the Database Field entry from the Library.

PROMPT FIELDS



A **Prompt Field** entry links a [Field Name] to a data entry window. Perfect Complement replaces the [Field Name] in your document with keyboard input data.

Blackbeard Marine /Hook	Phineas T. Hook
-------------------------	-----------------

Enter Check Number:
4573

August 16, 1988

[Company]
[Name]
[Address1]
[Address2?]
[City], [State] [Zip Code]

Dear [Salutation],
We received your check number [Check Number] in the amount of \$[Check Amount]. However, [Reason Returned]

Sincerely,

[Credit Manager]
Credit Manager

ADDING A PROMPT FIELD ENTRY

To *add* a Prompt Field entry to the Library:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Prompt Fields** from the Library Maintenance menu.

The Prompt Fields menu appears.

Prompt Fields
Account Manager
Check Amount
Credit Manager
Days Closed
Reason Closed
Service Manager

- 3 Press **Ins (Insert)**.

The ADD PROMPT Data Entry Form appears.

Prompt Fields
Account Manager
Check Amount
Credit Manager
Days Closed
Reason Closed
Service Manager

Add Prompt
Field Name Check Number
Prompt
Prompt type
Data type
Data length 0

Field Name

Type the name you will use as the **[Field Name]** in your Standard Documents. You may use upper and lower case letters, as well as numbers.

NOTE: There is a limit of 20 characters per Field Name, including spaces but not including the brackets.

DO NOT USE ! ? [] OR - IN THE NAME.

A Prompt Field Name must be unique. If you try to add a name that is already in the Library, you will get an error message.

Prompt

Type the prompt you want to appear in the data entry window. The prompt should ask for the desired information.

Examples:

Enter Settlement Date

What is the Past Due Amount?

Add Prompt	
Field Name	Check Number
Prompt	Enter Check Number:
Prompt type	
Data type	
Data length	0

Prompt type
Global
Per Letter

Prompt Type

Select the type of Prompt. There are two types of Prompts - global or per letter.

Global Prompt

A Global Prompt occurs once for the document during generation. The data repeats in each document produced.

Per Letter Prompt

A Per Letter Prompt occurs for every document produced during generation.

If you are sending a letter to five people in a Name & Address File, the Global Prompt appears once and the data is used in all five letters. The Per Letter Prompt repeats for each letter.

Data type
Currency
Date
Menu
Numeric
Paragraph
Phone
SSN
Text

Data Type

Select the type of data. Each type is explained below.

Currency Currency data with two decimal places and commas.

Date Date in country format. USA default format is mm/dd/yy.

Menu A list of items you select from for insertion into a document.

After you select Menu as the Data Type, press **Enter**, proceed to enter the Data Length (see Data Length on page 145). When through, press **Esc** or **Exit (F7)**.

A blank Menu Prompt Setup screen will appear for you to enter the Menu information.

Description

Type a description of the data. This will appear on the menu when displayed.

Data

Type the "actual" data that would be inserted into the document. You may also enter a [Prompt Field] here. For an example, see the figure below.

Menu Prompt Setup	
Field Name	Signature
Description	Data
Bill	William T. Landers
Chris	Christopher D. Hardin
Frank	Frank A. Harris
Janet	Janet R. Pierce
John	Johnathan P. Stevens
Other	[Other]

If you selected Menu as the Data Type, press **Esc** or **Exit** when the Menu Prompt Setup screen is complete.

Numeric 0123456789

Paragraph Alpha-numeric data with word wrap.

Phone	012-345-6789
SSN	Social Security Number. 123-45-6789
Text	Alpha-numeric data limited to a maximum of 64 characters.

Data Length

Type the number of characters you want the prompt to accept.

This field defaults to a proper length for the Data Type selected. You may change the length, if desired. An error message will tell you if the length exceeds the maximum for the Data Type selected.

3 Press Esc or Exit.

Perfect Complement adds the Prompt Field entry to the Library. The Field Name appears in alphabetical order within the Prompt Fields menu.

VIEWING A PROMPT FIELD ENTRY

To *view* Prompt Field information:

- 1** Select **Prompt Fields** from the Library Maintenance menu.

The Prompt Fields menu appears.

- 2** Select the **Prompt Field**. The VIEW PROMPT form appears with the current information.

- 3** Press **Esc** or **Exit** to return to the Prompt Fields menu.

CHANGING A PROMPT FIELD ENTRY

To *change* Prompt Field information:

- 1 Select **Prompt Fields** from the Library Maintenance menu.

The Prompt Fields menu appears.

- 2 Highlight the **Prompt Field** and press **Retrieve (Shift-F10)**. The CHANGE PROMPT FIELD form appears with the current information.

- 3 Select the **field** you want to change.

- 4 Select or type your changes.

- 5 Press **Esc** or **Exit** to save your changes and return to the menu.

REMOVING A PROMPT FIELD ENTRY

You can remove a Prompt Field entry from the Library when it is no longer needed.

To *remove* a Prompt Field entry:

- 1 Select **Prompt Fields** from the Library Maintenance menu.

The Prompt Fields menu appears.

- 2 Highlight the **Prompt Field** and press **Del (Delete)**.

- 3 A "Delete? Y/N" menu will appear. Select **Yes**.

Perfect Complement will remove the Prompt Field entry from the Library.

LIST FIELDS

A **List Field** entry links a [Field Name] to a Pop-Up menu. The menu contains optional WordPerfect files which you select from for insertion into the document. Perfect Complement replaces the [Field Name] in your document with contents of the file(s) selected from the menu.

Select reason the check was returned:
<input checked="" type="checkbox"/> \$ and Written Amounts disagree
<input type="checkbox"/> Failed to endorse check
<input type="checkbox"/> Insufficient Funds

August 16, 1988

[Company]
[Name]
[Address1]
[Address2?]
[City], [State] [Zip Code]

Dear [Salutation],
We received your check number [Check Number] in the amount of \$[Check Amount]. However, [Reason Returned]

Sincerely,

[Credit Manager]
Credit Manager

Each selection on the menu refers to a WordPerfect file:

Select reason the check was returned:
<input type="checkbox"/> \$ and Written Amounts disagree
<input checked="" type="checkbox"/> Failed to endorse check
<input type="checkbox"/> Insufficient Funds

the courtesy amount and written amount do not agree.

We have marked the enclosed check void. Please write a new check to replace this one and send it at your earliest convenience to assure continued service.

Select reason the check was returned:
<input type="checkbox"/> \$ and Written Amounts disagree
<input checked="" type="checkbox"/> Failed to endorse check
<input type="checkbox"/> Insufficient Funds

you failed to endorse the check.

Please endorse the enclosed check and return it to us at your earliest convenience.

Select reason the check was returned:
<input type="checkbox"/> \$ and Written Amounts disagree
<input type="checkbox"/> Failed to endorse check
<input checked="" type="checkbox"/> Insufficient Funds

your bank has indicated your account had insufficient funds to cover the amount.

We must request that you send a certified check or money order for \$[Check Amount] in order to assure continued service.

Perfect Complement assembles the finished document from the Standard Document and the file(s) you select from the list menu.

August 16, 1988

Acme Glass And Screen
Reginald T. Fernburger
9301 Burton Avenue
Leesburg, Virginia 77665

Dear Mr. Fernburger,
We received your check number 3246 in the amount of \$512.00. However **your bank has indicated your account had insufficient funds to cover the amount.**

We must request that you send a certified check or money order for \$512.00 in order to assure continued service.

Sincerely,

Tony Carlucci
Credit Manager

August 16, 1988

Blackbeard Marine
Phineas T. Hook
1 Bayshore Drive
Slip 23
Annapolis, Maryland 21234

Dear Mr. Hook,
We received your check number 131252 in the amount of \$4.03. However **you failed to endorse the check.**

Please endorse the enclosed check and return it to us at your earliest convenience.

Sincerely,

Tony Carlucci
Credit Manager

ADDING A LIST FIELD ENTRY

To *add* a List Field entry to the Library:

- 1 Select **List Fields** from the Library Maintenance menu.

The List Fields menu appears.

List Fields
Contract Conditions
Incorporation List#1
Incorporation List#2
Incorporation List#3
Lease Agreement
License Clauses
Loan Clauses

- 2 Press **Ins** (Insert).

The ADD LIST Data Entry Form appears.

Add List	
Field Name	Reason Returned
List Heading	
List Type	
Description	WordPerfect file

Field Name

Type the name you will use as the [Field Name] in your Standard Documents. You may use upper and lower case letters. The name may also include numbers, spaces and symbols.

NOTE: There is a limit of 20 characters per Field Name, not including the brackets.

DO NOT use ! ? [] or - in the name.

A List Field Name must be unique. If you try to add a name that is already in the Library, you will get an error message.

List Heading

Type the heading you want to appear in the Pop-Up menu.

List Type

Select the type of list. You have two choices as explained below.

List Type
Select all that apply
Select any one

Select All That Apply

This type allows selection of more than one item on the list menu.

Select Any One

This type allows only one selection from the list menu.

Add List	
Field Name	Reason Returned
List Heading	Select reason the check was returned:
List Type	Select any one
Description	WordPerfect file
Insufficient Funds	C:\DEMO\BADCHECK.L01
Failed to endorse check	C:\DEMO\BADCHECK.L02
\$ and written amounts disagree	C:\DEMO\BADCHECK.L03

Description

Type the file description you want to appear in the Pop-Up menu.

WordPerfect File

Type the drive, path, and file name of the WordPerfect file.

Perfect Complement inserts the contents of this file in the document when you select the Description from the menu.

***NOTE!** There is a limit of 32 Description/WordPerfect File items in a list. The files referenced in a list may contain field names. There is no limit to the number of list fields a document may contain. You may also insert a list field within a list field. This is called "nesting." There is no limit on the nesting of lists.*

3 Press Esc or Exit.

Perfect Complement adds the List Field entry to the Library. The Field Name appears in alphabetical order within the List Fields menu.

VIEWING A LIST FIELD ENTRY

To *view* List Field information:

- 1 Select **List Fields** from the Library Maintenance menu. The List Fields menu appears.
- 2 Select the **List Field** you want to view. The VIEW LIST form appears with the current information.
- 3 Press **Esc** or **Exit** to return to the List Fields menu.

CHANGING A LIST FIELD ENTRY

To *change* List Field information:

- 1 Select **List Fields** from the Library Maintenance menu. The List Fields menu appears.
- 2 Highlight the **List Field** and press **Retrieve (Shift-F10)**. The CHANGE LIST FIELD form appears with the current information.
- 3 Select the information you want to change.
- 4 Select or type your changes.
- 5 Press **Esc** or **Exit** to save your changes and return to the menu.

REMOVING A LIST FIELD ENTRY

You can remove a List Field entry from the Library when it is no longer needed. This does **NOT** erase the WordPerfect files used in the list.

To *remove* a List Field entry:

- 1 Select **List Fields** from the Library Maintenance menu. The List Fields menu appears.
- 2 Highlight the **List Field** and press **Del (Delete)**.
- 3 A "Delete? Y/N" menu will appear. Select **Yes**.

Perfect Complement will remove the List Field entry from the Library.

5

SELECTION CRITERIA

CHAPTER 5 CONTENTS

How To Use Selection Criteria	160
Adding A Selection Criteria Entry	161
Inserting & Removing Rules	167
Viewing A Selection Criteria Entry	167
Changing A Selection Criteria Entry	168
Removing A Selection Criteria Entry	168
Sort	170
Automatic Selection	177

SELECTION CRITERIA

Library Maintenance
Standard Documents
Database Fields
Prompt Fields
List Fields
External Database
Reports
Selection Criteria

The **Selection Criteria** feature allows you to set rules for selecting and sorting records from a file. You store the rules in the Library. You can create Selection Criteria for a Name & Address File or an External Database. When you generate documents, you use Selection Criteria to pick records for printing.

You can also assign Selection Criteria to a document. Each time that document is generated, it will automatically choose records for printing based on the assigned Selection Criteria rule.

The **Sort** function, found on the Add Selection Criteria Data Entry Form, lets you perform an ascending or descending sort of one or more selected database fields. You can use Sort by itself or with Selection Criteria rules. If no Selection Criteria rules are entered, all records are selected for the sort.

HOW TO USE SELECTION CRITERIA

If you had just installed a new 800 number for your Maryland customers, you might want to send a letter to advise them. To do this, you would set up a Selection Criteria for the CLIENT database and call it MARYLAND CLIENTS. The rule would be:

STATE Equal to Maryland End

There is no limit to the number of different Selection Criteria you can set up for a file. The RULES can be as simple as the above example, or more elaborate with several test conditions to qualify a record.

When there is more than one rule, an EXPRESSION connects the rules. If, in the above example, the 800 number was also available in Virginia, you would use an "OR" expression.

STATE Equal to Maryland OR STATE Equal to Virginia End

Perfect Complement tests rules in the sequence they appear in the list. When a group of rules must be tested together we enclose them in **parentheses**. With the above example, if you only want to send the letter to active accounts the rule might look like this:

STATUS Equal to Active AND (STATE Equal to Maryland OR STATE Equal to Virginia)END

If the parentheses were not used, Perfect Complement would select active accounts in Maryland and ANY accounts in Virginia.

If this seems confusing, don't worry! Make your best guess. When you Generate Documents, you can select the **VIEW** option of the **OUTPUT** menu and see a list of the selected records. You can always change the Selection Criteria rules.

ADDING A SELECTION CRITERIA ENTRY

To *add* a Selection Criteria entry to the Library:

- 1 select **Maintain Library** from the Main Menu.
- 2 Select **Selection Criteria** from the Library Maintenance menu.

The Name & Address Files/External Database List menu appears. This is a list of all Name & Address Files and External Database references in the Library.

Name & Address Files/External Database List	
▲	Customer
	Employees - Active
	Employees - Retired
	Hotels
	Houses for Sale
	Industry Conference Attendees - August Show
	Product Training Seminar Registrants
	Prospective Clients & Target Accounts
	Restaurants
▼	training

- 3 Select the **File** that you want to create a Selection Criteria for.

The Selection Criteria menu appears. This is a list of current Selection Criteria for the file you selected.

Selection Criteria
Accounts with Annual Sales greater than \$100,000
Business Type is Legal
Fortune 500 Accounts

4 Press Ins (Insert).

The ADD SELECTION CRITERIA Data Entry Form appears.

Add Selection Criteria			
Database description	Prospect		
Description	Active Accounts In Maryland or Virginia		
< Database Field	Condition	Value	> Expression
Sort Disable			

Database Description

Perfect Complement displays this field for your information.

Description

Type a description of the Selection Criteria. This description appears in the Selection Criteria Menu.

(

Type a left parenthesis to begin a group of rules. When testing just one condition, you may leave this blank.

Database Field

Select the field you want to test from the list of fields in the database.

NOTE! For an External Database, Perfect Complement displays all the fields in the file, not just those that have Database Field entries.

Add Selection Criteria			
Database description	Prospect		
Description	Active Accounts In Maryland or Virginia		
(Database Field	Condition	Value) Expression
	Equal to		End

Database Field
Phone No.
Salutation
State
Status
Title

Sort Disable

Condition

Select from the list of conditions.

Add Selection Criteria			
Database description	Prospect		
Description	Active Accounts In Maryland or Virginia		
(Database Field	Condition	Value) Expression
Status	Equal to		End

Condition
Contains
Equal to
Greater or equal to
Greater than
Less or equal to
Less than
Not equal to

Sort Disable

Perfect Complement uses the condition to test the contents of the database field against the value.

Value

There are 3 types of entries that can be placed in the Value field:

Typed Entry

Type in what you want the Value to be. For example:

Status Equal To **Active**

State Equal To **Maryland**

If you type in the Value, Perfect Complement expects the format to be compatible with the Database Field type.

Text Enter any combination of alphanumeric characters.

Date Enter a date in MM/DD/YY or DD/MM/YY, depending on Country Code.

Numeric Enter 0 through 9. Use a "." for decimal values. To enter a negative or minus value, put a "-" in front of the number.

***NOTE!** Comparisons are based on standard ASCII collating sequence - lowercase b comes before uppercase A. Because of this, the comparison is case sensitive. This means that "Maryland" and "MARYLAND" are not equal.*

Database Field Name

Type a Database Field Name. The Field Name must be contained within [brackets]. With a Database Field as the Value, you can "compare" 2 fields within a record. For example:

Account Balance Greater Than [**Credit Limit**]

With this criterion, a document would be generated for each record where the account balance exceeds the credit limit.

You can only use a Database Field as the Value when you want to compare one Database Field to another.

Prompt Field Name

Type a Prompt Field Name. The Field Name must be contained within [brackets]. It must also be defined in the Library. For example, State Contains [**Ask For State**]. During generation, the Prompt will appear for you to type in the State that you want the Selection Criteria based on. If you enter "CA," then all records where the State is California will be selected.

Enter the type of Value that you want, then press **Enter**.

)

TYPE a right parenthesis to end a group of rules.

Expression

Select the expression from the menu.

Add Selection Criteria			
Database description	Prospect		
Description	Active Accounts In Maryland or Virginia		
< Database Field	Condition	Value) Expression
Status	Equal to	Active	
< State	Equal to	Maryland	
			Expression
			And
			End
			Or
Sort Disable			

And

This rule AND the next rule or group of rules must be true.

Or

This rule OR the next rule or group of rules must be true.

End

This is the last rule.

If you want to use the Sort feature with the Selection Criteria you just created, refer to *Using Sort With Selection Criteria* on page 172.

- 5 Press **Esc** or **Exit (F7)** to save your new entry and return to the menu.

Perfect Complement adds the Selection Criteria entry to the Library. The Description appears in alphabetical order within the Selection Criteria menu.

INSERTING & REMOVING RULES

A **Rule** is the combination of the (, **Database Field**, **Condition**, **Value**,) and **Expression** fields on the Data Entry Form.

To *insert* a rule ahead of an existing rule:

Highlight any field of the existing rule and press **Ins** (**Insert**).

To *remove* a rule:

Highlight any field of the rule and press **Del** (**Delete**).

*NOTE! If you remove the last rule, you have also removed your **END** expression. Make certain the new last rule has an **END** expression.*

VIEWING A SELECTION CRITERIA ENTRY

To *view* Selection Criteria information:

- 1 From the Main Menu, select **Maintain Library**.
- 2 From the Library Maintenance menu, select **Selection Criteria**. The Name & Address Files/External Database List menu appears.
- 3 Select the **File** you want to view Selection Criteria for. The Selection Criteria menu appears.
- 4 Select the desired **Selection Criteria description**. The **VIEW SELECTION CRITERIA** form appears with the current information.
- 5 Press **Esc** or **Exit** to return to the Selection Criteria menu.

CHANGING A SELECTION CRITERIA ENTRY

To *change* Selection Criteria information:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Selection Criteria** from the Library Maintenance menu. The Name & Address Files/External Database List menu appears.
- 3 Select the **file** you want to change Selection Criteria for. The Selection Criteria menu appears.
- 4 Highlight the Selection Criteria description and press **Retrieve (Shift-F10)**. The CHANGE SELECTION CRITERIA form appears with the current information.
- 5 Select the field you want to change. Select or type your changes.
- 6 Press **Esc** or **Exit** to save your changes and return to the menu.

REMOVING A SELECTION CRITERIA ENTRY

You can remove a Selection Criteria entry from the Library when it is no longer needed.

To *remove* a Selection Criteria entry:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Selection Criteria** from the Library Maintenance menu. The Name & Address Files/External Database List menu appears.
- 3 Select the **file** for which you want to remove a Selection Criteria. The Selection Criteria menu appears.

- 4 Highlight the Selection Criteria description and press **Del (Delete)**.
- 5 A "**Delete? Y/N**" menu will appear. Select your response and press **Enter**.

Perfect Complement will remove the Selection Criteria entry from the Library.

NOTE: If you remove a Selection Criteria that has been assigned for a document's Automatic Selection, an error message will occur when the document is generated.

SORT



The **Sort** function lets you perform an Ascending or Descending sort based on the selected Database Field.

Ascending will sort from the lowest to the highest numerically, or from A to Z alphabetically.

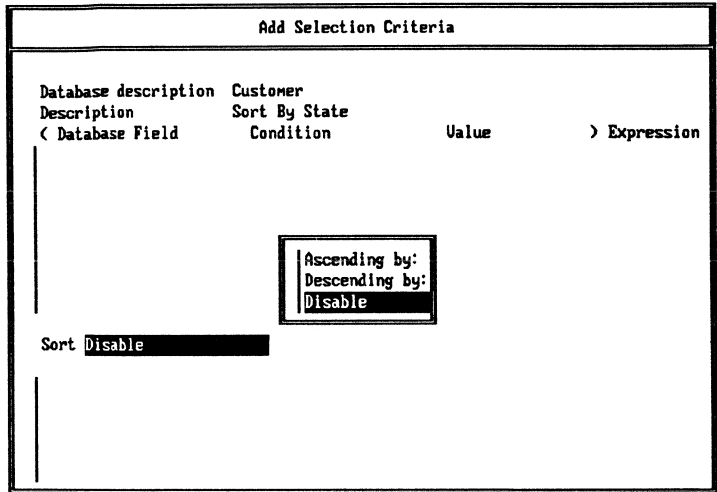
Descending will sort from the highest to the lowest numerically, or from Z to A alphabetically.

ADDING SORT CRITERIA

To *add* Sort Criteria:

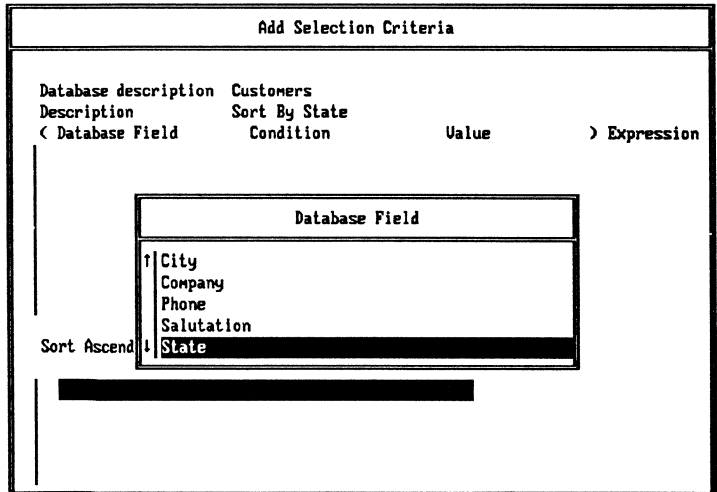
- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Selection Criteria** from the Library Maintenance menu.
- 3 Select the desired **Database File**. The current Selection Criteria for the file will appear. If no Selection Criteria have been previously defined, the list will be empty.
- 4 Press **Ins (Insert)**. The ADD SELECTION CRITERIA Data Entry Form appears.
- 5 Type a description of the Selection Criteria. For example, "Sort By Account Number." Press **Enter**.
- 6 Press the down arrow key to move to the Sort field.

7 Press **Enter**. The Sort menu appears.



8 Select **Ascending By** or **Descending By**. The highlighted bar will move down 2 lines.

9 Press **Enter**. A list of the Database Fields in the file appears.



- 10 Select the field you want the records sorted by. You may select more than one field. The sort will be performed on the fields in the order selected.

Add Selection Criteria			
Database description	Customers		
Description	Sort By State		
< Database Field	Condition	Value	> Expression
Sort Ascending by:			
State			
Company			

- 11 Press **Esc** or **Exit (F7)** to add the Sort information to the Selection Criteria list.

USING SORT WITH SELECTION CRITERIA

After you have defined Selection Criteria, you can also define Sort criteria for the selected records. For example, the Selection Criteria can be to select All Active Accounts In Maryland Or Virginia, then sort the accounts by Account Number.

- 1 Follow steps 1-3 of *Adding A Selection Criteria* beginning on page 161.

After selecting the **End** expression, press the down arrow to move to the Sort field.

Add Selection Criteria				
Database description	Prospect			
Description	Active Accounts In Maryland or Virginia			
< Database Field	Condition	Value	> Expression	
Status	Equal to	Active	And	
< State	Equal to	Maryland	Or	
State	Equal to	Virginia	> End	
Sort Disable				

2 Press Enter. The Sort menu appears.

Add Selection Criteria				
Database description	Prospect			
Description	Active Accounts In Maryland or Virginia			
< Database Field	Condition	Value	> Expression	
Status	Equal to	Active	And	
< State	Equal to	Maryland	Or	
State	Equal to	Virginia	> End	
Sort Disable				

Ascending by:
Descending by:
Disable

3 Select Ascending By or Descending By.

4 Press **Enter**. The Database Field list appears.

Add Selection Criteria			
Database description	Prospect		
Description	Active Accounts In Maryland or Virginia		
< Database Field	Condition	Value	> Expression
Status	Equal to	Active	And
< State	Equal to	Maryland	Or
State			> End

Database Field

- Account Number
- Account Type
- City
- Company
- Name

Sort Ascending by:

Account Number

5 Select the field you want the records sorted by.

Add Selection Criteria			
Database description	Prospect		
Description	Active Accounts In Maryland or Virginia		
< Database Field	Condition	Value	> Expression
Status	Equal to	Active	And
< State	Equal to	Maryland	Or
State	Equal to	Virginia	> End

Sort Ascending by:

Account Number

6 Press **Esc** or **Exit (F7)** to complete the SELECTION CRITERIA Data Entry Form.

CHANGING SORT CRITERIA

To *change* Sort Criteria:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Selection Criteria** from the Library Maintenance menu.
- 3 Select the desired Database File.
- 4 Highlight the desired Selection Criteria description. Press **Retrieve (Shift-F10)**. The CHANGE SELECTION CRITERIA Data Entry Form appears.
- 5 Press the down arrow key until the Sort Field is highlighted.
- 6 To change the Sort mode, press **Enter**. Select **Ascending By** or **Descending By**.

To change a Database Field, press **Enter**. Select the desired field(s).

- 7 Press **Esc** or **Exit (F7)** to complete the Data Entry Form.

DISABLING THE SORT FEATURE

To *disable* the Sort feature:

- 1 Select **Maintain Library** from the Main Menu.
- 2 Select **Selection Criteria** from the Library Maintenance menu.
- 3 Select the desired Database File.
- 4 Highlight the desired Selection Criteria description. Press **Retrieve (Shift-F10)**. The CHANGE SELECTION CRITERIA Data Entry Form appears.

- 5 Press the down arrow key until the Sort Field is highlighted.
- 6 Press **Enter**. The Sort menu appears.
- 7 Select **Disable**.
- 8 Press **Esc** or **Exit (F7)**.

AUTOMATIC SELECTION

With the *Automatic Selection* feature, you can "assign" a Selection Criteria to a document. For example, if you have a document that goes to just your customers in California, you can define a Selection Criteria where "State is Equal To California." You can then assign that Selection Criteria to the document. Each time that document is generated, Perfect Complement will automatically select and print a document for each customer in California from the specified Name & Address or Database file.

ENABLING AUTOMATIC SELECTION

To *enable* Automatic Selection:

- 1 First, you must define the Selection Criteria. Refer to *Adding A Selection Criteria Entry* on page 161.

After defining the Selection Criteria, press **Esc** or **Exit (F7)** twice to return to the Library Maintenance menu.

- 2 Select **Standard Documents**. The Document Class menu appears.
- 3 Select the desired **Class**. The list of SubClasses/Documents appears.
- 4 Select the **SubClass**, if any.
- 5 Select the **document description**. The Document Maintenance menu appears.
- 6 Select **Document Information**. The CHANGE DOCUMENT Data Entry Form will appear.

Use the down arrow key to highlight Automatic Selection.

Automatic Selection

Press **Enter**. The Disable/Enable menu appears. Select **Enable**.

Credit & Collections	
▶Collections	

Change Document			
Document Desc.	Rate Increase - Maryland & Virginia		
WordPerfect File	C:\DEMO\RATEINC.M&U		
Author	you		
Merge to	Printer		
Instructions			
Automatic Select	<table border="1"><tr><td>Disable</td></tr><tr><td>Enable</td></tr></table>	Disable	Enable
Disable			
Enable			
Database			
Selection Crite			
Document Control	Single Document		

Database

Press **Enter**. A list of the current Name & Address Files/External Databases appears. Select the desired file.

Credit & Collections	
▶Collections	

Change Document	
Document Desc.	Rate Increase - Maryland & Virginia
WordPerfect File	C:\DEMO\RATEINC.M&U
Author	you
Merge to	Printer
Instructions	
Automatic Selection	Enable
Database	Cancelled Accounts
Selection Criteria	
Document Control	Single Document

Database
Customer
Hotels
Houses for Sale
Prospect
Travel

Selection Criteria

Press **Enter**. A list of the current Selection Criteria for the selected Name & Address File/External Database appears. Select the desired **Selection Criteria**.

Credit & Collections	
▶Collections	
Database name	
Document	Active Accounts In Maryland or Virginia
WordPerfe	Active Accounts In Pennsylvania
Author	Balance Exceeds Credit Limit
Merge to	Merge All
Instructi	
Automatic Selection	Enable
Database	Customer
Selection Criteria	
Document Control	Single Document

7 Press **Esc** or **Exit (F7)** until you return to the Main Menu.

When the document is generated, it will use the assigned Selection Criteria to choose records for printing.

DISABLING AUTOMATIC SELECTION

You may disable the Automatic Selection feature at any time.

To *disable* Automatic Selection:

1 Select **Maintain Library** from the Main Menu.

- 2 Select **Standard Documents** from the **Library Maintenance** menu.
- 3 Select the **Class** that contains the document you want.
- 4 Select the **SubClass**, if any.
- 5 Select the desired **document**. The **Document Maintenance** menu appears.
- 6 Select **Document Information**. The **CHANGE DOCUMENT** Data Entry Form appears.
- 7 Press the down arrow key until the **Automatic Selection** field is highlighted.

Press **Enter**. The **Disable/Enable** menu appears. Select **Disable**.

The **Automatic Selection** feature is now disabled for this document.

- 8 Press **Esc** or **Exit (F7)** until you return to the **Main Menu**.

6

GENERATING DOCUMENTS

CHAPTER 6 CONTENTS

Quick Merge	185
Generating Documents	187
Selecting The Document	188
Answering List Field Menus	189
Answering Global Prompts	190
Selecting Data From A Database	190
Answering Per Letter Prompts	195
Printing The Documents	196

QUICK MERGE

Quick Merge is a feature designed for documents that you don't want to store in the Library. For example, a document that may be confidential.

USING QUICK MERGE

To perform a *Quick Merge*:

- 1 At the Main Menu, press **Merge (Ctrl-F9)**. The QUICK MERGE Data Entry Form appears.

The diagram shows two windows. The top window is titled "MAIN MENU" and contains a list of options: "Generate Documents", "Maintain Library", "Name & Address Files", and "WordPerfect (TM)". The bottom window is titled "Quick Merge" and contains two fields: "WordPerfect File" with a blacked-out input area, and "Merge to Printer" with a blacked-out input area.

WordPerfect File

There are two ways to enter the **Drive:\Directory\Filename** of the document you want to generate:

- a) Type the **Drive:\Directory\Filename** of the document

-OR-

- b) Press **List Files (F5)**. A prompt with the WordPerfect **Drive:\Directory** appears.

Press **Enter**. A list of all the files in the current directory or document directory, if configured, displays. Use the up & down arrow keys to move through the list.

Select the desired **Filename**. The Filename will appear in the "WordPerfect File" field.

Merge To

Press **Enter**. The Merge To menu appears.

MAIN MENU	
Generate Documents	
Maintain Library	
Name & Address Files	
WordPerfect (TM)	

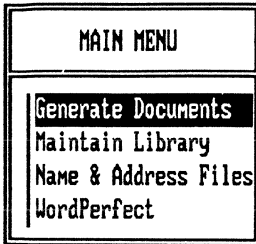
Quick Merge		Merge to
WordPerfect File	C:\DEMO\GENERIC.LTR	Fax
Merge to	Printer	Printer
		Screen

Select **Fax, Printer or Screen**.

The Quick Merge data entry form is now complete.

- 2 Press **Esc** or **Exit (F7)** to begin the merge.
- 3 Complete any Prompt or List Fields that appear.
- 4 After all Prompts or List Fields have been answered, the merge will be performed automatically.

GENERATING DOCUMENTS



Generating Documents is the production end of Perfect Complement.

In order to generate documents you must have completed the following steps:

- Created a Standard Document in WordPerfect.
- Added the document to the Library.

NOTE! If this is a new document, be sure you have resolved any Undefined Fields. (See Resolving Undefined Fields on page 114.)

Generating Documents consists of the following steps:

- 1 - SELECTING THE DOCUMENT
- 2 - ANSWERING LIST FIELD MENUS
- 3 - ANSWERING GLOBAL PROMPTS
- 4 - SELECTING DATA FROM A DATABASE
- 5 - ANSWERING PER LETTER PROMPTS

Steps 2 through 5 will vary depending on the types of Field Names in the document and if the document uses Automatic Selection. If a document did not have List Fields and Prompt Fields you may only have steps 1 and 4.

When all steps required for the document are complete, Perfect Complement runs WordPerfect to prepare the finished product.

SELECTING THE DOCUMENT

To *select* a document:

- 1 Select **Generate Documents** from the Main Menu. The Document Class menu appears.
- 2 Select the desired **Class and SubClass**.

Step 1

MAIN MENU
Generate Documents Maintain Library Name & Address Files WordPerfect (TM)

Step 2

Document Class
Articles Of Incorp. Contracts Conventions & Seminars Credit & Collections Employee/Payroll Forms Marketing Mr. Reynold's Personal

Step 3

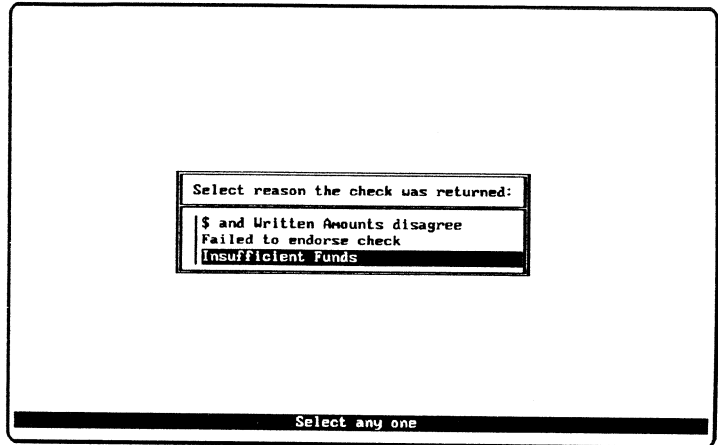
Credit & Collections ▶Collections
Past Due Account - Letter 1 Past Due Account - Letter 2 Past Due Account - Letter 3 Returned Check Letter

- 3 Select the **document description**.

ANSWERING LIST FIELD MENUS

If your document contains **List Fields**, pop-up menus will appear for you to select optional WordPerfect files to insert in the finished document.

When a List Field menu appears, you can **Select Any One** or **Select All That Apply** based on how the List Field was defined.



To Select Any One:

- 1 Highlight the description of your choice.
- 2 Press **Enter**.

To Select All That Apply:

- 1 Highlight the description of your choice.
- 2 Press **Mark (Alt-F5)**.
- 3 Repeat steps 1 and 2 for each choice.
- 4 Press **Enter**.

ANSWERING GLOBAL PROMPTS

If your document contains **Global Prompt Fields**, pop-up data entry windows will appear for keyboard input. For each record selected from a database, the Global Prompt is used to repeat the same information in every document. (See *Global Prompts page 143.*)

Credit Manager's Name
Tony Carlucci

To answer a *Global Prompt*:

- 1 Type your response.
- 2 Press **Enter**.

SELECTING DATA FROM A DATABASE

If your document contains **Database Fields**, Perfect Complement will now step you through the process of selecting the record(s) from the database or **Name & Address File**.

Automatic File Selection

If the document references **Database Fields** in an **External Database**, Perfect Complement will select that database file.

If the document references any **Database Fields** in a **Name & Address file** that are **User-Defined**, Perfect Complement will select that **Name & Address File**.

Manual File Selection

If the document references only **Database Fields** that are the same **User-Defined Name & Address File fields** (Company, Name, Title, etc.), you must select the file.

Perfect Complement displays a menu of the **Name & Address Files**.

Name & Address Files
Accounts In Credit & Collections
Board of Directors
Community Relations Committee
Employees - Active
Employees - Retired
Industry Conference Attendees
Plaintiffs
Product Training Seminar Registrants
Prospective Clients & Target Accounts
Restaurants

- 1 Highlight the desired File.
- 2 Press Enter.

Selection Criteria

The Selection Criteria menu appears.

Selecting ALL Records in a File:

- 1 Highlight Merge All.
- 2 Press Enter.

Selection Criteria
Final Notice
In California
Merge All
No Previous Contact
Resolved Accounts
View All

Perfect Complement selects every record in the file.

Manually Selecting Records in a File:

- 1 Highlight **View All**. (View All is the default selection.)

NOTE: The maximum number of viewable records is limited by memory. You will receive a message that the "number of records exceeds list display." If you want to view the list, you could create a Selection Criteria to break down the list alphabetically into smaller groups.

- 2 Press **Enter**.

Perfect Complement displays a menu of all records in the file, in Filing Sequence order.

Accounts In Credit & Collections	
Acme Glass & Screen /Fernburger	Reginald T. Fernburger
Blackbeard Marine /Hook	Phineas T. Hook
Bozo Clown Supply Co/Freeloader	Freddie Freeloader
Dundalk Marine Engin/Porter	Alvin Porter
Fulton Group /Barnsuorth	Arnold T. Barnsuorth
Johnson Lumber /Johnson	Douglas Johnson
Last Chance Bar & Gr/Keebler	Paul Keebler
Moore Graphics /Moore	Lindsey Moore
Nuclear Physics Rese/Walters	John T. Walters
Reynolds Associates /Reynolds	Steven Reynolds

To Select ONE Record:

- 1 Highlight the desired record.
- 2 Press **Enter**.

To Select MULTIPLE Records:

- 1 Highlight a desired record.
- 2 Press **Mark (Alt-F5)**.
- 3 Repeat steps 1 and 2 until all desired records are selected.
- 4 Press **Enter**.

User-Defined Selection Criteria

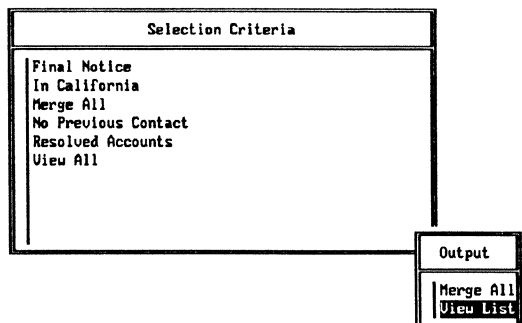
If you have created your own Selection Criteria, the description appears in the Selection Criteria menu.

- 1 Highlight the desired Selection Criteria.
- 2 Press **Enter**.

Perfect Complement searches through the file and selects records that pass the Selection Criteria test.

Perfect Complement then displays a count of records that passed the test and the **Output** option menu appears.

2 Records qualify.



3 Select Merge All or View List.

Merging ALL Records Selected:

- 1 Highlight Merge All.
- 2 Press Enter.

Perfect Complement will generate a document for each record selected.

Manually Choosing from Selected Records:

- 1 Highlight View List.
- 2 Press Enter.

Perfect Complement displays a menu of all records selected from the file, in Filing Sequence order.

Accounts In Credit & Collections		
Dundalk Marine Engin/Porter		Alvin Porter
Fulton Group	/Barnsworth	Arnold T. Barnsworth

To Select ONE Record:

- 1 Highlight the desired record.
- 2 Press Enter.

To Select MULTIPLE Records:

- 1 Highlight a desired record.

- 2 Press **Mark (Alt-F5)**.
- 3 Repeat steps 1 and 2 until all desired records are selected.
- 4 Press **Enter**.

Perfect Complement uses only the marked records to generate the documents.

ANSWERING PER LETTER PROMPTS

If your document contains **Per Letter Prompt Fields**, pop-up data entry windows will appear for *keyboard* input. When you are generating a document for each record selected from a database, the Per Letter Prompt is used to input new information for every document. (See *Per Letter Prompts* on page 143.)

Dundalk Marine Engin/Porter

Enter the check number:

2307

To Answer a Per Letter Prompt:

- 1 Type your response.
- 2 Press **Enter**.

PRINTING THE DOCUMENTS

When Perfect Complement has completed assembling the document(s), it will run WordPerfect. WordPerfect handles all of the final merging and printing.

February 1, 1990

Dundalk Marine Engineering
Alvin Porter
2006 Dundalk Avenue
Suite 3408
Dundalk, MD 29876

Dear Mr. Porter:

We received your check, number 2307, in the amount of \$5,600.00. However, your bank has indicated that your account has insufficient funds to cover the amount.

We must request that you send a certified check or money order for \$5,600.00 in order to ensure continued service.

Sincerely,

Tony Carlucci
Credit Manager

If you have set the Merge To option to **Fax**, the merged document(s) will go directly to the fax board.

If you have set the Merge To option to **Printer**, the merged document(s) will go directly to the printer.

If you have set the Merge To option to **Screen**, the merged document(s) will appear on the WordPerfect screen. You would then press **Print (Shift-F7)** to send the merged document(s) to the printer.

When you exit (**F7**) from WordPerfect, you will return to the Perfect Complement Main Menu.

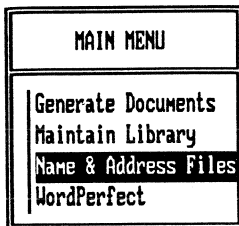
7

NAME & ADDRESS FILES

CHAPTER 7 CONTENTS

Name & Address Files	201
Adding A Name & Address File	202
Changing Name & Address File Information	208
Removing A Name & Address File	209
Customizing A Name & Address File	210
Name & Address Records	218
Name Search	230
Castaway List	235
Moving Name & Address Records	239
Name & Address File Conversion	251

NAME & ADDRESS FILES



The **Name & Address File** feature lets you build and maintain data files for information you will use in document generation. To help you get started, Perfect Complement provides a "starter set" of basic information fields. You can delete or change any of these fields, as well as add new fields to suit your needs. You can also separate Field Names on different screens. This allows you more flexibility in organizing your information.

You can build as many separate Name & Address Files as you need to organize your data. Creating and customizing a file is incredibly easy and does not require any technical skills.

There is no practical limit to the number of records in a Name & Address File. You are limited only by the amount of disk storage on your computer.

The Name & Address File feature also offers:

- Name Search
- Duplicate Record Check
- Move & Copy records from one Name & Address File to another
- Conversion of ASCII, WordPerfect Notebook & Secondary files to Perfect Complement's Name & Address File format

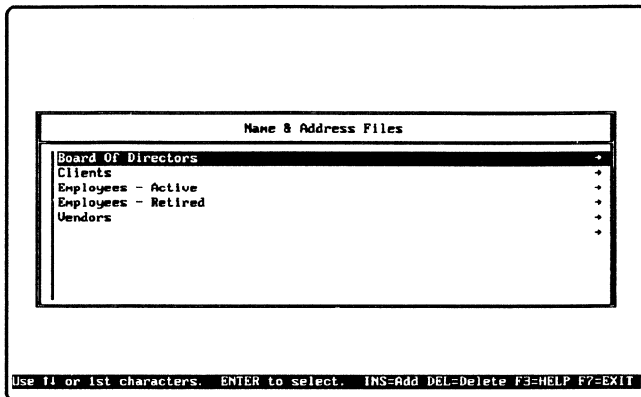
Each of these features is explained fully in this chapter.

ADDING A NAME & ADDRESS FILE

To *add* a new Name & Address File:

- 1 Select **Name & Address Files** from the Main Menu.

A list of existing Name & Address Files appears.



- 2 Press **Ins (Insert)**.

The **ADD NAME & ADDRESS FILE INFORMATION** Data Entry Form appears.

Name

Type up to an eight (8) character file name. This name must be unique. Perfect Complement uses this name internally.

Location

Type the full **drive, path, and file name** for creating the file on disk. Perfect Complement uses a ".NAF" suffix on all Name & Address files. Do **NOT** put the ".NAF" suffix in the Location field.

Perfect Complement defaults to the current drive and directory. It uses the **Name** field value as the default file name. In most cases, you will not have to change this field from the default settings.

Name

Add Name & Address File Information	
Name	CREDIT
Location	
Description	
File Owner	
Number of Records 0	
Name Search	Disabled
Filing Sequence Build	Enabled
Access Mode	Public
Entry Format	Standard US

Location

Add Name & Address File Information	
Name	CREDIT
Location	C:\DEMON\CREDIT
Description	CREDIT
File Owner	
Number of Records 0	
Name Search	Disabled
Filing Sequence Build	Enabled
Access Mode	Public
Entry Format	Standard US

Description

Add Name & Address File Information	
Name	CREDIT
Location	C:\DEMON\CREDIT
Description	Accounts In Credit & Collections
File Owner	
Number of Records 0	
Name Search	Disabled
Filing Sequence Build	Enabled
Access Mode	Public
Entry Format	Standard US

Description

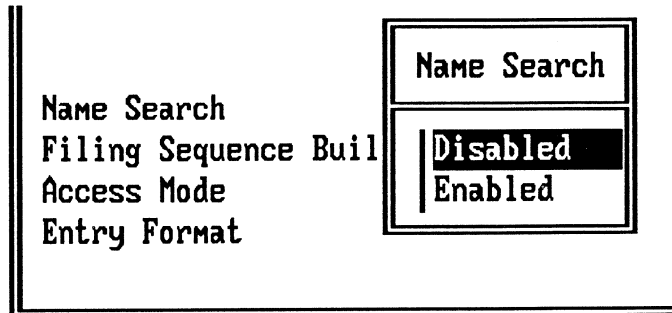
Type a description of the file. This will appear in the Perfect Complement menus. Perfect Complement uses the Name entry as a default description. Press **Enter** when through.

File Owner

The File Owner field will be blank unless Security is enabled. If Security is enabled, File Owner defaults to the name entered at the User Name/Password prompt when Perfect Complement is started. This name can be changed, if desired, but only by the Administrator.

Name Search

Disabled appears as the default entry. Press Enter. The Name Search Menu will appear.



Enabled will include the Name & Address File when any Name Search is performed. When this mode is selected, the Duplicate Check option will appear. (See *Duplicate Check* on page 205.)

Disabled will omit the Name & Address File from the Name Search process. When selected, the Duplicate Check option will not appear.

Select Enabled or Disabled and press **Enter**.

NOTE: You can only have 8 Name & Address Files enabled at one time. A small arrow will appear to the right of the Name & Address File name indicating that Name Search has been enabled for that file.

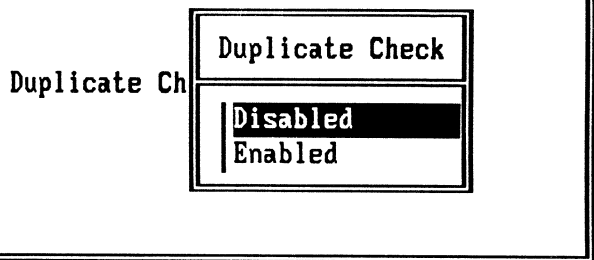
Filing Sequence Build

Select **Enabled** if you want Perfect Complement to automatically build the Filing Sequence for each record. If **Disabled** is selected, the information from the first field in the record is used as the Filing Sequence. This field **CANNOT** be changed when there are records in the file.

Duplicate Check

If the Name Search function is enabled, the Duplicate Check field will appear. The default entry is disabled.

Press **Enter**. The Duplicate Check menu appears.



When *enabled*, Perfect Complement will automatically search the file for duplicate records when new ones are added. This will prevent you from adding the same record twice.

Select Enabled or Disabled and press **Enter**.

NOTE: Name Search must be enabled for the file in order to enable Duplicate Check. You can only have 8 files enabled at one time.

Access Mode

Public appears as the default mode. Press Enter. The Access Mode menu appears.

Name Search	Access Mode
Filing Sequence Build	Private
Access Mode	Public
Entry Format	Read Only

Private

When Private is selected, only the File Owner will have access to the file. It will appear only in the Name & Address Files menu of the File Owner. The file will not be available to any other user during generation.

Public

Each user will be able to view, modify or delete information in the Name & Address Files. The file will be available to all users during generation.

Read Only

Users will only be able to view information in the Name & Address Files. Changes or deletions can only be made by the Administrator or the File Owner. The file will be available to all users during generation.

NOTE: The Administrator will have complete access to all Name & Address File information, regardless of the Access Mode selected.

Entry Format

Press **Enter**. An Entry Format menu will appear. Perfect Complement provides a selection of standard file formats, such as Insurance and Personnel.

- 3 Press **Esc** or **Exit** to signal completion of the Data Entry Form.
- 4 The Field Menu appears with the "starter set" of basic name and address fields provided by Perfect Complement.

User defined fields			
Field name	Field Type	Length	Screen
Company	Text	48	1
Name	Name	48	1
Title	Text	48	1
Address1	Text	32	1
Address2	Text	32	1
City	Text	32	1
State	Menu	16	1
Zip	Zip Code	9	1
Phone No.	Phone - USA	10	1
Fax No.	Fax	10	1
Salutation	Text	32	1

You may delete or change any of these fields. You cannot delete fields once there are records in the file. You may, however, add new fields at the end of the list, even when records are in the file.

If you want to customize the fields, proceed to *Customizing A Name & Address File* on page 210.

If you **DO NOT** want to customize fields, press **Esc** or **Exit** to complete the Data Entry Form and create your new data file.

Perfect Complement creates a file on disk using the **Location** field contents for the name. A file extension of ".NAF" is added to all Name & Address Files. It then adds a Name & Address File reference to the Library and displays the **Description** field in alphabetical order on the menu. All fields in the file can be referenced in a Standard Document.

CHANGING NAME & ADDRESS FILE INFORMATION

You may change Name & Address File information. However, you CANNOT change the **Name** field. If you move the Name & Address File (.NAF), you must change the Location field.

To *change* Name & Address File Information:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Highlight the File Description and press **Retrieve (Shift-F10)**. The CHANGE NAME & ADDRESS FILE INFORMATION form appears with the current information.
- 3 Select the Field you want to change.
- 4 Type your changes.
- 5 Press **Esc** or **Exit (F7)**.

If you want to change or remove fields, see *Changing/Removing User Defined Fields* on page 216.

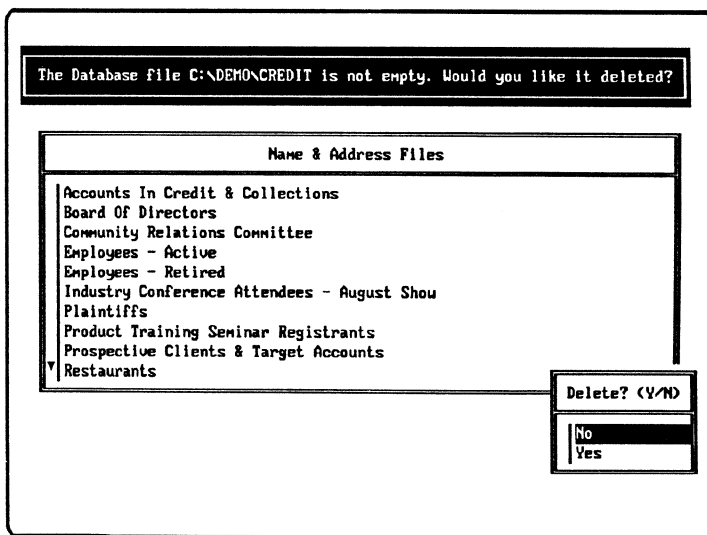
REMOVING A NAME & ADDRESS FILE

You can remove a Name & Address File when it is no longer needed. Perfect Complement will erase the file from disk and remove references to the file from its dictionary.

To *remove* a Name & Address File:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Highlight the Description and press **Del** (**Delete**).
- 3 A "Delete? Y/N" menu will appear. Select your response and press **Enter**.

If there are records in the file, you will get a warning and a second "Delete? Y/N" menu will appear.



Perfect Complement will remove the file information and erase the file from disk.

CUSTOMIZING A NAME & ADDRESS FILE

You can customize a Name & Address File to your own needs by adding new fields. If you set up a file for clients, you might want fields for Account Number, Payment Amount, Comments, etc. If you set up a file for employees, you might want fields for Position, Level, Hire Date, etc.

You perform Name & Address field maintenance from the fields menu when adding or changing a Name & Address File. The Fields menu always displays after you exit from the ADD or CHANGE NAME & ADDRESS FILE INFORMATION Data Entry Forms.

Perfect Complement gives you a "starter set" of fields. You may delete or change any of these. There is a limit of 4,096 characters per record available for fields. The Fields Data Entry Form keeps track of the number of characters filled and the number still available. The "characters filled" is the total of all fields in the record.

User defined fields			
Field name	Field Type	Length	Screen
Company	Text w/ Shift	48	1
Name	Name	48	1
Title	Text	48	1
Address1	Text w/ Shift	32	1
Address2	Text w/ Shift	32	1
City	Text w/ Shift	32	1
State	Menu	16	1
Zip Code	Zip Code	9	1
Phone No.	Phone - USA	10	1
Fax No.	Fax	10	1
Salutation	Text	32	1

361 characters filled

3735 characters still available

You can modify field information; however, you CANNOT change the **Field Type** or **Length** once there are records in the file.

With the **Screen** feature, you can separate Field Names to different screens. For example, Screen 1 could contain address and phone information, Screen 2 could contain account information, etc.

GETTING TO THE FIELDS MENU

If you are **not** presently at the Fields menu, follow the steps below. If you are at the Fields menu, skip to step 1 of *Adding Fields on page 212*.

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Highlight the **File Description** and press **Retrieve (Shift-F10)**. The **CHANGE NAME & ADDRESS FILE INFORMATION** form appears.
- 3 Press **Esc** or **Exit** to display the Fields menu.

User defined fields			
Field name	Field Type	Length	Screen
Company	Text w/Shift	48	1
Name	Name	48	1
Title	Text w/Shift	48	1
Address1	Text w/Shift	32	1
Address2	Text w/Shift	32	1
City	Text w/Shift	32	1
State	Menu	16	1
Zip	Zip Code	9	1
Phone No.	Phone - USA	10	1
Fax No.	Fax	10	1
Salutation	Text w/Shift	32	1

You are now ready to maintain User Defined Fields.

ADDING FIELDS

When there are no records in the file, you may add fields anywhere within the list. If there are records in the file, you can only add fields at the end of the existing fields.

To *add* Fields:

- 1 When there are no records in the file, new fields can be inserted **above** existing ones. Position the highlighted bar on the field that will be under the one you want to add. For example, if you want to add a field called **Type Of Business** between the Company and Name fields, you would highlight Name. The new field will be added above it.

If there are records in the file, position the highlighted bar after the last field on the list and proceed to step 3.

- 2 Press **Ins (Insert)**. A blank highlighted line will appear.
- 3 Complete as follows:

Field Name

Type the Field Name you want to add. The name may include upper and lower case letters and numbers. Press **Enter** when through.

NOTE: DO NOT USE ! ? [] or - IN THE FIELD NAME.

Field Type

Press **Enter**. The Field Type menu will appear.

User	Field type	Length	Screen
Field name	Appointment		
Company	Currency	48	1
Name	Date	48	1
Title	Fax	64	1
Address1	Menu	32	1
Address2	Military Time	32	1
City	Name	32	1
State	Numeric	32	1
Zip Code	Paragraph	16	1
Phone No.	Phone - USA	9	1
Fax No.	Postal Code	10	1
Salutation	SSN	10	1
	Text	32	1
	Text w/ Shift		
	Time - am/pm		
	Zip Code		

Appointment Allows entry of date and time in the same field.
MM/DD/YY hh:mm AM or PM
Ex: 12/02/90 03:30 PM

Currency Currency with 2 decimal places

Date MM/DD/YY

Fax Formatted telephone number entry (123) 456-7890

Menu Pop-up menu with User Defined text entries. See Using Menu Fields page 223.

Military Time hh:mm:ss

Name	During data entry, the first letter of first & last or first, middle & last names will be automatically capitalized
Numeric	0 through 9
Paragraph	Multiple line text entry with word wrap for comments
Phone-USA	Formatted telephone number entry (123) 456-7890
Postal Code	Canadian standard format, A1B 2C3
SSN	Social Security Number, 123-45-6789
Text	Single line alphanumeric entry
Text w/Shift	During data entry, the first letter of each word will be automatically capitalized.
Time-am/pm	Standard time format, hh/mm
Zip Code	U.S. standard format, 12345-6789

Select the desired Field Type.

Length

Perfect Complement defaults to an appropriate length for the Field Type you selected. You may change this setting for some fields.

If you want to change the length, type the desired length and then press **Enter**.

***NOTE!** The data for the fields in a Name & Address Record uses only the disk space it actually needs. If you make a field length of 64, you are actually telling Perfect Complement the maximum to allow. There is a limit on the total number of characters available for the length of the fields.*

Screen

Select which Screen you would like this Field to be on (1, 2, 3, etc). You may group Field Names on different Screens. For example, Screen 1 could contain address and phone information, Screen 2 could contain account information, etc.

User defined fields			
Field name	Field Type	Length	Screen
↑ Name	Name	48	1
Title	Text	48	1
Address1	Text w/ Shift	32	1
Address2	Text w/ Shift	32	1
City	Text w/ Shift	32	1
State	Menu	16	1
Zip Code	Zip Code	9	1
Phone No.	Phone - USA	18	1
Salutation	Text	32	1
Account Number	Numeric	15	2
Account Type	Text	64	2
↓ Monthly Payment	Currency	15	2

- 4 Press **Esc** or **Exit (F7)** to leave the Fields menu and return to the Name & Address Files menu.

Perfect Complement adds the new fields to the Name & Address File information. It also makes Database Field entries in the Library for the new fields.

CHANGING USER DEFINED FIELDS

Perfect Complement allows you to change Field information in a Name & Address File.

***NOTE!** You **CANNOT** change the Field Type or Length of a field once there are records in the file without completely unloading and reloading it.*

To *change* Field information:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Highlight the **File Description** and press **Retrieve (Shift-F10)**. The Change Name & Address File Information form appears.
- 3 Press **Esc** or **Exit (F7)** to display the Fields menu.
- 4 Highlight the **Field Name** you want to change.
- 5 Make your changes.
- 6 Press **Esc** or **Exit** to leave the Fields menu and return to the Name & Address Files menu.

REMOVING A USER DEFINED FIELD

You can remove a User Defined Field *only* if there are no records in the file.

***NOTE:** If you need to make major changes to a file, you can use the cut/copy feature to cut all the records from the file, modify the fields, then retrieve the records back into the file. For more information, see **Moving Name & Address Records** on page 239.*

To *remove* a User Defined Field:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Highlight the **File Description** and press **Retrieve (Shift-F10)**. The Change Name & Address File Information form appears.
- 3 Press **Esc** or **Exit (F7)** to display the Fields menu.

NOTE! You CANNOT remove a Field from a file that contains records.

- 4 Highlight the field you want to remove and press **Del (Delete)**.

Perfect Complement will remove the Field from the Name & Address File.

- 5 Press **Esc** or **Exit** to signal completion.

NAME & ADDRESS RECORDS

Perfect Complement organizes the information in a Name & Address File into **Records**, just as you might group all information into a file folder within a filing cabinet, Perfect Complement groups all fields into a Record.

Accounts In Credit & Collections	
Dundalk Marine Engin Porter	
Company	Dundalk Marine Engineering
Name	Alvin Porter
Title	President
Address1	2006 Dundalk Avenue
Address2	Suite 3400B
City	Dundalk
State	Maryland
Zip Code	29876-
Phone No.	(301) 889-9988
Fax	(301) 565-5655
Salutation	Mr. Porter

Each Record contains the data fields for one individual. Perfect Complement provides a “starter set” of basic information fields for you. You may delete any of these fields, as well as add your own. (See *Customizing A Name & Address File* on page 210.)

A Filing Sequence is maintained using the fields on the first screen of the Name & Address Record Data Entry Form. This determines the filing order of the records in the file. If **Filing Sequence Build** has been enabled for the file, the Filing Sequence will be built automatically as you enter data into the Name & Address Record Data Entry Form. If Filing Sequence Build is disabled, the data from the first field is placed in Filing Sequence. After you have entered all of the data on the first screen, you can change the Filing Sequence field to suit your needs.

ADDING A NAME & ADDRESS RECORD

To *add* a record to your Name & Address File:

- 1 Select **Name & Address Files** from the Main Menu.

A list of existing Name & Address Files appears.

- 2 Select the **File Description** you wish to add records to.

A menu appears with the file description as the heading and an alphabetical list of the records in the file. If this is a new file the list is empty.

Accounts In Credit & Collections	
Acme Glass And Scree/Fernburger	Reginald T. Fernburger
Blackbeard Marine /Hook	Phineas T. Hook
Bozo Clown Supply Co/Freeloader	Freddie Freeloader
Dundalk Marine Engin/Porter	Alvin Porter
Fulton Group /Barnsworth	Mr. Arnold T. Barnsworth
Johnson Lumber /Johnson	Mr. Douglas Johnson
Moore Graphics Arts /Moore	Mr. Lindsey Moore
Nuclear Physics Rese/Walters	Mr. John T. Walters
Reynolds Associates /Reynolds, Jr.	Mr. Arnold R. Reynolds, Jr.
Terrier Delivery Ser/McDuff	Mr. Sebastian McDuff

- 3 Press **Ins (Insert)** to add a new record.

The Name & Address RECORD Data Entry Form appears. The file name will appear at the top. Below are descriptions of the basic fields provided by Perfect Complement. Remember, you can delete any of these fields you do not need.

Accounts In Credit & Collections	
Company Name	[REDACTED]
Title	
Address1	
Address2	
City	
State	
Zip Code	-
Phone No.	() -
Fax	() -
Salutation	

Company

Type the name of the company. If there is no business affiliation leave the field blank.

Name

Type the person's name as you would want it to appear in an address.

Accounts In Credit & Collections	
Last Chance Bar & Gr Keebler	
Company	The Last Chance Bar & Grill
Name	Mr. Paul Keebler
Title	[REDACTED]
Address1	

Title

Type the professional title of the named individual.

Address1

Type the first line of address.

Address2

Type the second line of address.

City

Type the city or town.

NOTE! For international addresses you may want to type city and province.

State

Press **Enter**. Select the State from the menu. If the menu has not yet been created, or the State you need is not on the list, see *Using Menu Fields* on page 223.

Phone No.

Type the area code and phone number.

FAX

Type the facsimile machine telephone number.

Salutation

Type the salutation you will want to use in your correspondence.

Accounts In Credit & Collections	
Last Chance Bar & Grill	
Company	The Last Chance Bar & Grill
Name	Paul Keebler
Title	Owner
Address1	5632 Eastern Avenue
Address2	
City	Baltimore
State	MD
Zip Code	28413-
Phone No.	(301) 876-5432
Salutation	Mr. Keebler

- 4 If there are additional fields on screen 1, complete the field information as required.

NOTE: The following keys control movement between and within screens:

Up & Down Arrow Keys - to move forward and back one field at a time within a screen

Page Down - to move from the first to the last field of a screen

Page Up - to move from the last to the first field of a screen

Ctrl-Page Down - to move forward to the next screen

Ctrl-Page Up - to move back to the previous screen

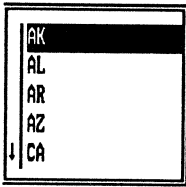
If there are no more fields on screen 1, or any additional screens, press **Esc** or **Exit (F7)**. Perfect Complement returns to the file's list of records. The new record is added to the list in alphabetical order.

- 5 If there are fields on subsequent screens, press **Ctrl-Page Down** to move to the next screen.

Enter the information for the fields on screen 2 as required. If there are fields on additional screens, press **Ctrl-Page Down** to move to the next screen, entering the required field information for each screen.

- 6 Press **Esc** or **Exit (F7)** when through.

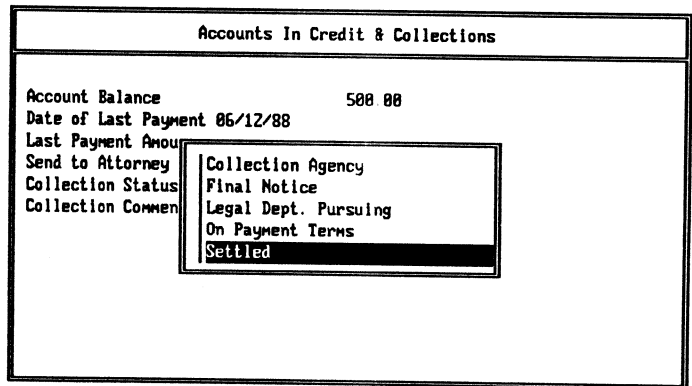
USING MENU FIELDS



When you select a field that is a MENU Field Type, a Pop-Up list appears. When first selected, the list will be empty. The State field in the User Defined Fields Data Entry Form is an example of using the MENU Field Type. You can make any User Defined Field a Menu Field Type.

SELECTING FROM A MENU FIELD

When you select a Menu field by pressing **Enter** the menu appears.



Accounts In Credit & Collections	
Account Balance	500 00
Date of Last Payment	06/12/88
Last Payment Amount	
Send to Attorney	
Collection Status	Collection Agency
Collection Comments	Final Notice
	Legal Dept. Pursuing
	On Payment Terms
	Settled

- 1 Highlight the item you want to select.
- 2 Press **Enter**.

The selected item is placed in the data entry field.

Accounts In Credit & Collections	
Account Balance	500.00
Date of Last Payment	06/12/88
Last Payment Amount	500.00
Send to Attorney on:	12/01/88
Collection Status	Settled
Collection Comments	

If a Menu Field is highlighted and you type the first characters of an item in that menu, the menu will appear with the Menu Selection Bar on the first item matching those characters.

ADDING A MENU ITEM

To *add* an item to the Menu list:

- 1 When the Menu is displayed, press **Ins** (**Insert**).

A Data Entry window appears.

Accounts In Credit & Collections	
Account Balance	500.00
Date of Last Payment	06/12/88
Last Payment Amou	
Send to Attorney	Collection Agency
Collection S	
Collection C	Menu Element: Settled

2 Type the new Menu item.

3 Press Enter.

The new item is added to the Menu list.

Accounts In Credit & Collections	
Account Balance	500.00
Date of Last Payment	06/12/88
Last Payment Amou	
Send to Attorney	Collection Agency
Collection Status	Final Notice
Collection Commen	Legal Dept. Pursuing
	On Payment Terms
	Settled

CHANGING A MENU ITEM

To *change* a menu item:

- 1 When the menu is displayed, highlight the item you want to change and press **Retrieve (Shift-F10)**.

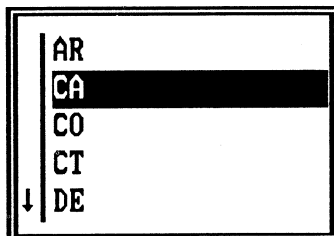
A Data Entry window appears with the current value.

↑ AR
Menu Element: CALIF
↓ CT

- 2 Type your changes.

3 Press Enter.

The item is changed and updated in the menu list.



REMOVING A MENU ITEM

To *remove* a menu item:

- 1 When the menu is displayed, highlight the item you want to remove and press **Del** (**Delete**).
- 2 A "**Delete? Y/N**" menu appears. Select your response and press **Enter**.

The item is removed from the menu list.

Do **NOT** remove an item from the menu if there are records using the item value.

VIEWING A NAME & ADDRESS RECORD

To *view* information in a Name & Address record:

- 1 Select **Name & Address Files** from the Main Menu.

A list of existing Name & Address Files appears.

2 Select the desired File Description.

A menu appears with the File Description as a heading. This is an alphabetical list of the records in the file.

3 Select the record you want to view.

The NAME & ADDRESS RECORD Data Entry Form displays with the current information.

4 Press Ctrl-Page Down to view any additional screens.

5 Press Esc or Exit to return to the list of records.

**CHANGING A NAME &
ADDRESS RECORD**

To *change* the information in a Name & Address record:

1 Select Name & Address Files from the Main Menu.

A list of existing Name & Address Files appears.

2 Select the desired File Description.

A menu appears with the File Description as a heading. This is an alphabetical list of the records in the file.

3 Highlight the record you want to view and press Retrieve (Shift-F10).

The NAME & ADDRESS RECORD Data Entry Form displays with the current information.

- 4 Select the field you want to change.

Type the changes. If this is a Menu Field Type, press **Enter** to display the menu, then select the desired item.

- 5 If there are Fields on additional screens, press **Ctrl-Page Down** to move to the next screen.

Select the field you want to change.

Type the changes. If this is a Menu Field Type, press **Enter** to display the menu, then select the desired item.

- 6 Press **Esc** or **Exit** to return to the list of records.

Perfect Complement saves your changes to the record.

REMOVING A NAME & ADDRESS FILE RECORD

Perfect Complement allows you to remove a record from the Name & Address File when it is no longer needed.

To *remove* a Name & Address File record:

- 1 Select **Name & Address Files** from the Main Menu.

A list of existing Name & Address Files appears.

- 2 Select the desired File Description.

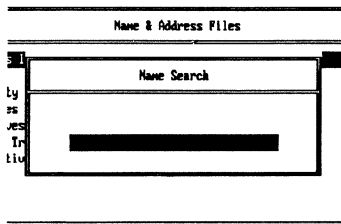
A menu appears with the file Description as a heading. This is an alphabetical list of the RECORDS in the file.

3 Highlight the record you want to remove and press **Del (Delete)**.

4 A "**Delete? Y/N**" menu appears. Select your response and press **Enter**.

Perfect Complement removes the record from the file.

NAME SEARCH



The **Name Search** function has many features. You can:

- Quickly locate Name and Address Records for viewing, modification or deletion.
- Cut or copy Name & Address Records from one File to another. (See *Moving Name & Address Records* on page 239.)
- Duplicate records within a File.
- Create a Castaway List to help keep the search process from becoming too large. (See *Castaway List* on page 235.)
- Use an * (asterisk) as a wildcard symbol to expand the search to all names and companies that might include the name you are searching for.

PERFORMING A NAME SEARCH ON ALL ENABLED FILES

A Name Search can only be performed on those Files for which the feature has been enabled. (See *Name Search* on page 204.)

- 1 Select **Name & Address Files** from the Main Menu. The list of Name & Address Files appears.
- 2 Press **Search (F2)**. The Name Search prompt appears.
- 3 Enter the **NAME** (first, last, both or company name) that you want to search for.

An * (asterisk) can be used as a "wildcard" symbol if you want to perform a search for all Name & Address Records containing your name entry. For example, if you enter SAM*, the Search would retrieve all SAM'S, SAMUEL'S, SAMANTHA'S, etc.

NOTE: The arrow that appears to the right of the Name & Address File indicates that Name Search is enabled for that file.

Name & Address Files		
Accounts I		+
Clients	Name Search	+
Community		+
Employees		+
Executives		+
Product Tr	DAVIS*	+
Prospectiv		+
Vendors		+

4 Press Enter.

When the search is complete, a list of all qualifying Name & Address Records will appear. If your name entry is not found during the search, you will receive an error message stating "No match on word combination."

Search on DAVIS from all files			
Davis	/Susan	Susan Davis	/EXECS
Friendly Office Supp	/Davis	John Davis	/VENDORS

With the list of Name & Address Records on the screen, you may view, edit or delete any record. You can also move all or selected records to another Name & Address File.

To *view* - highlight the name and press **Enter**.

To *edit* - highlight the name and press **Retrieve (Shift F10)**. While in the edit mode, you can modify any field in the Record.

To *delete* - highlight the name and press **Del (Delete)**.

To *move* - see *Moving Name & Address Records* on page 239.

PERFORMING A NAME SEARCH ON A SINGLE ENABLED FILE

A Name Search can only be performed on a file for which the feature has been enabled. (*See Name Search on page 204.*)

- 1 Select **Name & Address Files** from the Main Menu. The list of Name & Address Files appears.
- 2 Select the **Name & Address File** that you want to search.
- 3 Press **Search (F2)**. The Name Search prompt appears.
- 4 Enter the **NAME** (first, last, both or company name) that you want to search for.

An * (asterisk) can be used as a "wildcard" symbol if you want to perform a search for all Name & Address Records containing your name entry. For example, if you enter SAM*, the Search would retrieve all SAM'S, SAMUEL'S, SAMANTHA'S, etc.

NOTE: The arrow that appears to the right of the Name & Address File indicates that Name Search is enabled for that file.

Name & Address Files	
Accounts I	+
Clients	+
Community	+
Employees	+
Executives	+
Product Tr	+
Prospectiv	+
Vendors	+

Name Search	
DAVIS*	

5 Press Enter.

When the search is complete, a list of all qualifying Name & Address Records will appear. If your name entry is not found during the search, you will receive an error message stating "No match on word combination."

Search on DAVIS from all files			
Davis	/Susan	Susan Davis	/EXECS
Friendly Office Supp	/Davis	John Davis	/VENDORS

With the list of Name & Address Records on the screen, you may view, edit or delete any record. You can also copy or cut all or selected records to another Name & Address File.

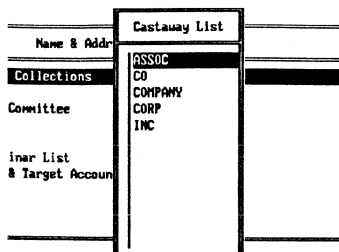
To *view* - highlight the name and press **Enter**.

To *edit* - highlight the name and press **Retrieve (Shift F10)**. While in the edit mode, you can modify any field in the Record.

To *delete* - highlight the name and press **Del (Delete)**.

To *move* - see *Moving Name & Address Records* on page 239.

CASTAWAY LIST



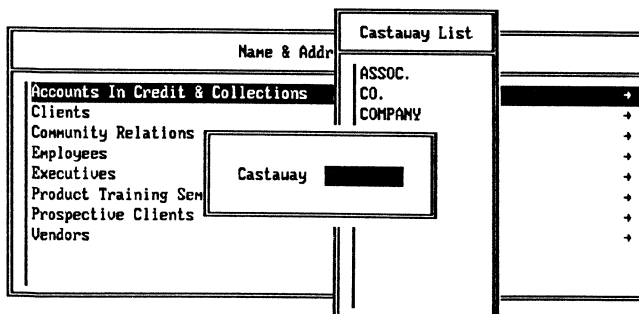
The Name Search feature allows you to create a **Castaway List**. A *castaway* is a word that you do not want included in the Name Search process. Examples of castaways might be THE, COMPANY, CO., INC., and ASSOC. Choose words that are common in your Name & Address Files, but will not necessarily help to locate a particular name or company. There is no limit to the number of entries you can make in your Castaway List.

The Castaway List is also recognized when building a Filing Sequence. Perfect Complement will look at the Castaway List and disregard, for example, the placement of THE at the beginning of company names. This will eliminate the possibility of companies being alphabetically listed under THE.

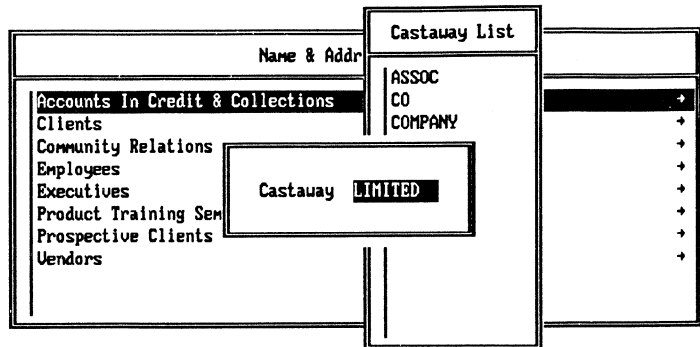
ADDING A CASTAWAY

To *add* a Castaway:

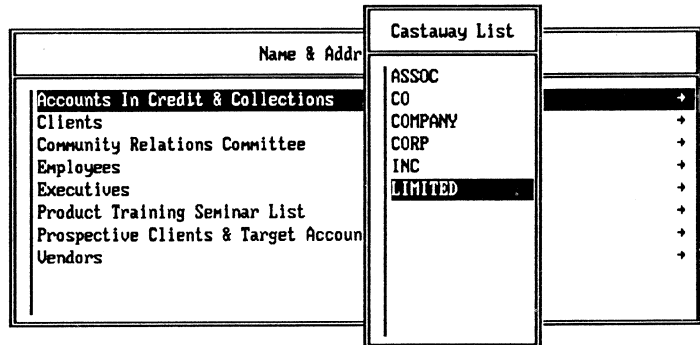
- 1 Select **Name & Address Files** from the Main Menu.
- 2 Press **Thesaurus (Alt F1)**. The Castaway List will appear.
- 3 Press **Ins (Insert)**. The Castaway Entry Window will appear.



- 4 Type the word that you would like to add, then press **Enter**.



- 5 Press **Esc** or **Exit**. The word you have added will appear in the Castaway List.



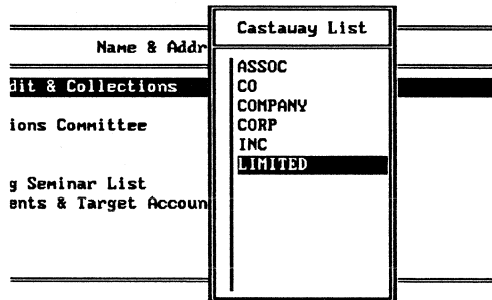
Repeat these steps for each word you want to add to the Castaway List.

MODIFYING A CASTAWAY

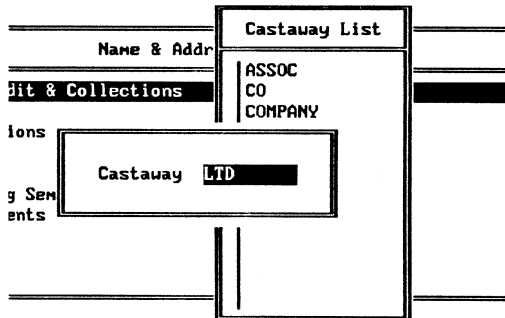
To *modify* a Castaway:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Press **Thesaurus (Alt F1)** to display the Castaway List.

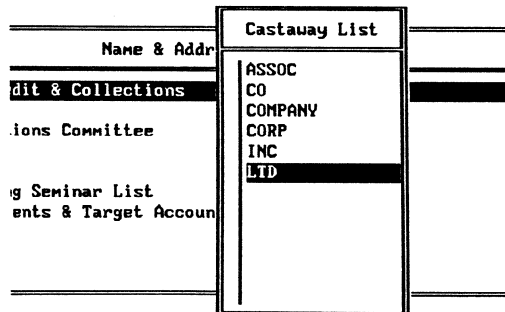
3 Highlight the word you want to modify.



4 Press **Retrieve (Shift F10)**. Make the modifications. Press **Enter**.



5 Press **Esc** or **Exit** to add the modified word to the Castaway List.



DELETING A CASTAWAY

To *delete* a Castaway:

- 1** Select **Name & Address Files** from the Main Menu.
- 2** Press **Thesaurus (Alt F1)**. The Castaway List will appear.
- 3** Highlight the word you want to delete.
- 4** Press **Del (Delete)**. A "Delete Castaway? No/Yes" menu appears. Select **Yes**.
- 5** Press **Esc** or **Exit (F7)**.

MOVING NAME & ADDRESS RECORDS



Perfect Complement lets you copy or cut records from one Name & Address File to another. You can also duplicate records within the same file. You can move records directly out of a Name & Address File or you can perform a Name Search and move records from those selected.

- **Copy** will put a duplicate of the record(s) into *another* file. The record(s) will then appear in both files.
- **Cut** will move the record(s) out of one file and into another. The records will be removed from the original file and added to the new file.
- **Duplicate** lets you duplicate one record at a time within the same file. This is handy when adding several people at the same address.

You can copy or cut *all* or *singular* records.

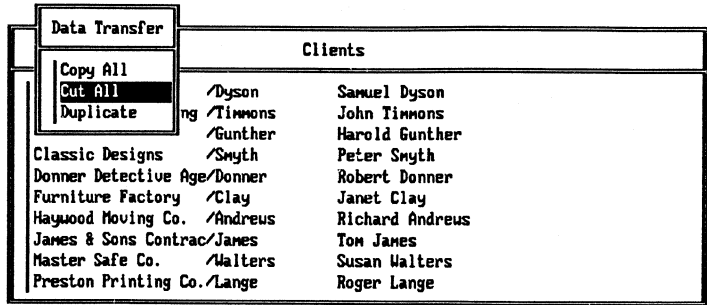
If you want to perform a Name Search prior to using the cut/copy function, follow steps 1-4 of *Performing A Name Search* on page 230. When all qualifying records are on the screen, proceed to step 3 of *Copy/Cut All Records* below or *Copy/Cut Selected Records* on page 244.

COPY/CUT ALL RECORDS

To copy or cut *ALL* records:

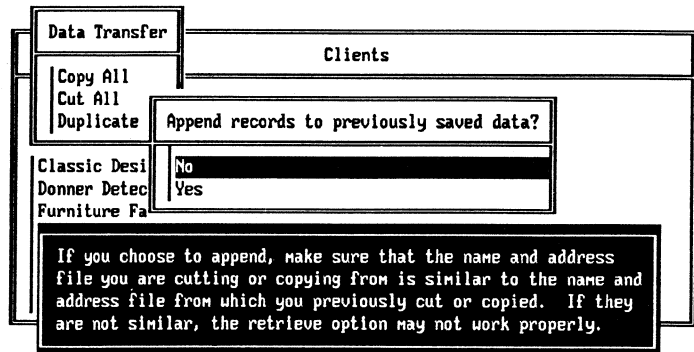
- 1 Select **Name & Address Files** from the Main Menu.
- 2 Select the **Name & Address File** you want to cut or copy records from.

3 Press **Move (Ctrl-F4)**. The Data Transfer menu appears. Select **Copy All** or **Cut All**.



4 If this is the first time you have cut or copied records, the list of Name & Address records will re-appear. If desired, you can press **Esc** to select another Name & Address File to cut or copy records from, or perform another Name Search. If you **do not** want to select another Name & Address File or perform another Name Search, proceed to step 5.

If you want to select another Name & Address File or perform another Name Search, do so, then repeat from step 3 above. A prompt will appear asking "**Append records to previously saved data?**"



Yes will *add* the records to any records previously copied/cut and saved.

No will *replace* any records previously copied/cut and saved.

Select **Yes** or **No**. The Name & Address Files screen appears.

5 Press **Esc** or **Exit (F7)**. Select the file you want to add the cut/copied records to. A list of the current records in that File will appear.

6 Press **Move (Ctrl F4)**. The Data Transfer menu will appear. Select **Retrieve**.

Data Transfer		Accounts In Credit & Collections	
Copy All		/Dyson	Samuel Dyson
Cut All		/Timmons	John Timmons
Duplicate	ing	/Gunther	Harold Gunther
Retrieve		/Smyth	Peter Smyth
		/Donner	Robert Donner
	Donner Detective Age	/Clay	Janet Clay
	Furniture Factory	/Andrews	Richard Andrews
	Haywood Moving Co.	/James	Tom James
	James & Sons Contrac	/Walters	Susan Walters
	Master Safe Co.	/Lange	Roger Lange
	Preston Printing Co.		

7 The **Retrieve** form appears.

Retrieve	
File To Text In	: Cut and Copy
File Format	: Ascii Delimited: " ", " "
Name and Address File:	Accounts In Credit & Collections
Sample Data From File	Move Into Field
Allied Glass Co.	
Samuel Dyson	
4921 Raynor Circle	
Baltimore	
MD	
21093	
301-233-0928	
Mr. Dyson	

File To Text In

Cut & Copy appears as the default mode.
This is the correct mode.

File Format

ASCII Delimited: " ", " " appears as the default format. This is the correct format. When records are cut or copied, Perfect Complement puts them into ASCII delimited format.

Name and Address File

The File that you selected to add the cut/copied records to will appear on this line.

Sample Data From File

Sample data from the cut/copied record(s) will appear.


Move Into Field

This column is used to match up the User Defined Fields of the selected Name & Address File to the sample data of the cut/copied record. See step 8 below.

Retrieve	
File To Text In	: Cut and Copy
File Format	: Ascii Delimited: " ", " "
Name and Address File:	Accounts In Credit & Collections
Sample Data From File	Move Into Field
Allied Glass Co.	Address1
Samuel Dyson	Address2
4921 Raymor Circle	City
Baltimore	Company
MD	Fax No.
21893	Name
301-233-0928	↓ Phone No.
Mr. Dyson	

- 8 With the Retrieve form on the screen, press **Enter**. The menu of Fields in the selected Name & Address File appears.

Match the Field Names to the "Sample Data From File" by highlighting the Field Name and pressing Enter. Use the Up & Down Arrow keys to move through the list or type the first letter(s) of the Field Name.

 *Mouse Note: To move above or below the displayed Field Names, place the pointer on the up or down arrow in the Field Names box and hold down the left button. The highlighted bar will move through the Field Names in the direction selected. Release the left button when you locate the Field Name you want and click the right button to select it.*

- 9 Press **Esc** or **Exit (F7)** when through. A counter in the upper right corner of the screen will show the number of records being added to the Name & Address File. The copied or cut records are now inserted into the Name & Address File that you selected.

Retrieve	
File To Text In	: Cut and Copy
File Format	: Ascii Delimited: " ", " "
Name and Address File: Accounts In Credit & Collections	
Sample Data From File	Move Into Field
Allied Glass Co.	Company
Samuel Dyson	Name
4921 Raymor Circle	Address1
Baltimore	City
MD	State
21093	Zip
301-233-0928	Phone No.
Mr. Dyson	Salutation

COPY/CUT SELECTED RECORDS

To copy or cut *SELECTED* records:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Select the **Name & Address File** you want to cut or copy records from.
- 3 Press **Mark (Alt-F5)**. The line will flash, indicating it has been selected.

Highlight and mark *each* record that you want to copy or cut.

- 4 After all records are marked, press **Move (Ctrl F4)**. A Data Transfer menu will appear. Select **Copy** or **Cut**.

Data Transfer		Clients	
Copy		/Dyson	Samuel Dyson
Cut		/Timmons	John Timmons
Duplicate		/Gunther	Harold Gunther
Classic Designs		/Smyth	Peter Smyth
Donner Detective Age	/Donner		Robert Donner
Furniture Factory	/Clay		Janet Clay
Haywood Moving	/Andreas		Richard Andreas
James Sons Contracto	/James		TOM JAMES
Master Safe	/Walters		Susan Walters
Preston Printing	/Lange		Roger Lange

- 5 If this is the first time you have cut or copied records, the list of Name & Address records will re-appear. If desired, you can press Esc to select another Name & Address File to cut or copy records from, or perform another Name Search. If you **do not** want to select another Name & Address File or perform another Name Search, proceed to step 6.

If you want to select another Name & Address File or perform another Name Search, do so, then repeat from step 3 above. A prompt will appear asking "**Append records to previously saved data?**"

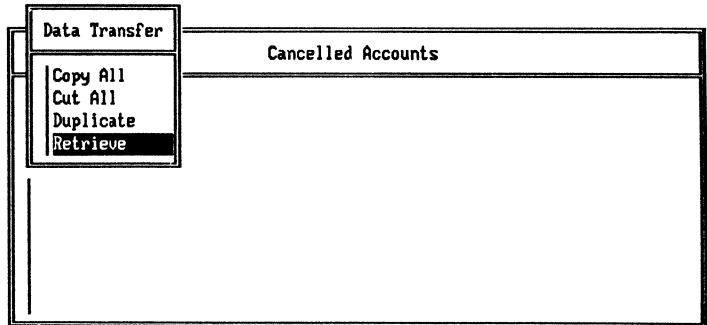
Yes will *add* the records to any records previously copied/cut and saved.

No will *replace* any records previously copied/cut and saved.

Select **Yes** or **No**. The Name & Address Files screen appears.

6 Select the file you want to add the cut/copied records to. A list of the present records in the file appears.

7 Press **Move (Ctrl F4)**. The Data Transfer menu appears.



Select **Retrieve**.

8 The Retrieve form appears.

Retrieve	
File To Text In	: Cut and Copy
File Format	: Ascii Delimited: " ", " "
Name and Address File:	Cancelled Accounts
Sample Data From File	Move Into Field
Allied Glass	/Dyson
Allied Glass Co.	
Samuel Dyson	
Manager	
23 Dunmore Lane	
Suite 13	
Baltimore	
MD	
21234	

File To Text In

Cut & Copy appears as the default mode.

File Format

ASCII Delimited " ", " " appears as the default format. When records are cut or copied, Perfect Complement puts them into ASCII Delimited format.

Name and Address File

The File that you selected to add the cut/copied records to will appear on this line.

Sample Data From File

Sample data from the cut/copied record(s) will appear.

Move Into Field


This column is used to match up the User Defined Fields of the selected Name & Address File to the sample data of the cut/copied record. See step 9 below.

Retrieve	
File To Text In	: Cut and Copy
File Format	: Ascii Delimited: " ", " "
Name and Address File: Cancelled Accounts	
Sample Data From File	Move Into Field
Allied Glass Co.	Address1
Samuel Dyson	Address2
Manager	City
23 Dunmore Lane	Company
Suite 13	Fax No.
Baltimore	Name
MD	Phone No.
21234	

9 With the Retrieve form on the screen, press **Enter**. The menu of User Defined Fields in the selected Name & Address File appears.

Match the Field Names to the "Sample Data From File" by highlighting the Field Name and pressing **Enter**. Use the **Up & Down Arrow** keys to move through the list or type the first letter(s) of the Field Name.

Retrieve	
File To Text In	: Cut and Copy
File Format	: Ascii Delimited: " ", " "
Name and Address File: Cancelled Accounts	
Sample Data From File	Move Into Field
Allied Glass Co.	Company
Samuel Dyson	Name
Manager	Title
23 Dunmore Lane	Address1
Suite 13	Address2
Baltimore	City
MD	State
21234	Zip Code

 **Mouse Note:** To move above or below the displayed Field Names, place the pointer on the up or down arrow in the Field Names box and hold down the left button. The highlighted bar will move through the Field Names in the direction selected. Release the left button when you locate the Field Name you want and click the right button to select it.

10 Press **Esc** or **Exit (F7)** when through. A counter in the upper right corner of the screen will show the number of records being added to the Name & Address File.

The copied or cut records are now inserted into the Name & Address File that you selected.

Cancelled Accounts		
Allied Glass	/Dyson	Samuel Dyson
Donner Detective Age/Donner		Robert Donner
James Sons Contracto/James		Tom James

11 Press **Esc** or **Exit** to return to the Name & Address Files menu.

DUPLICATING A RECORD

The Duplicate function lets you make a duplicate of a record in a Name & Address File. You can only duplicate one record at a time. This function is useful if, for example, you have several contacts at the same company. You can duplicate the original record as many times as needed, changing just the name field for each contact.

To *duplicate* a record:

- 1 Select **Name & Address Files** from the Main Menu.
- 2 Select the Name & Address File that contains the record you want to duplicate.
- 3 Highlight the record you want to duplicate.

Vendors		
Ace Delivery	/Unger	Linda Unger
Computer Connection	/Stone	Harris Stone
Drieden Printers	/Drieden	Robert Drieden
Fixit Plumbing & Heat	/Vincent	George Vincent
Software Source	/Stevens	Tom Stevens
Top Flight Travel	/Kiloran	Janet Kiloran
Zippy Car Rental	/Charles	Paul Charles

- 4 Press **Move (Ctrl-F4)**. The Data Transfer menu appears.

Vendors		
Ace Delivery	/Unger	Linda Unger
Computer Connection	/Stone	Harris Stone
Drieden Printers	/Drieden	Robert Drieden
Fixit Plumbing & Heat	/Vincent	George Vincent
Software Source	/Stevens	Tom Stevens
Top Flight Travel	/Kiloran	Janet Kiloran
Zippy Car Rental	/Charles	Paul Charles

Data Transfer
Copy All
Cut All
Duplicate
Retrieve

- 5 Select **Duplicate**. A duplicate of the record appears.

6 Make the desired changes to the record.

Vendors	
Zippy Car Rental	/Charles
Company	Zippy Car Rental
Name	Robert Tyler
Title	Vice President
Address1	218 Beaumont Road
Address2	
City	Baltimore
State	MD
Zip Code	21203-
Phone No.	(301) 768-7889
Fax No.	() -
Salutation	Robert
Service	Car rental

7 When all changes are made, press Esc or Exit.

The list of records in the Name & Address File will appear with the duplicate record added.

8 Press Esc or Exit until you return to the Main Menu.

NAME & ADDRESS FILE CONVERSION

With the **Name & Address File Conversion** feature you can convert WordPerfect Secondary and Notebook files, as well as certain ASCII delimited files, to Perfect Complement's Name and Address File format.

Perfect Complement will convert three types of ASCII delimited files. They are as follows:

ASCII Delimited by Comma - Fields are separated by commas. Records are separated by the carriage return-line feed pair of characters. The same number of fields should be found on each line.

ASCII Delimited by " " , " " - Fields are enclosed in double quotes and separated by commas. Records are separated by the carriage return-line feed pair of characters. The same number of fields should be found on each line.

ASCII Delimited by ' ' , ' ' - Fields are enclosed in single quotes and separated by commas. Records are separated by the carriage return-line feed pair of characters. The same number of fields should be found on each line.

***NOTE:** You cannot convert a WordPerfect Secondary file that has both 5.0 and 5.1 merge codes in it. If your file has both types of merge codes, you must use WordPerfect to convert the file to version 5.1 codes. Refer to your WordPerfect manual for instructions.*

File To Text In

Type the **Drive:\Directory\Filename** of the file you want to convert. Press **Enter**.

Text In	
File To Text In	: C:\NDB\EMPLOYEE.WPS
File Format	: Ascii Delimited: " " " "
Name and Address File:	
Sample Data From File	Move Into Field

File Format

A default ASCII delimited entry is displayed. Press **Enter**. A list of the supported types of files you can convert will be displayed. Select the type desired and press **Enter**.

Text In	
File To Text In	: C:\NDB\EMPLOYEE.WP
File Format	: WP Secondary
Name and Address File:	
Sample Data From File	
Alan Johnson 256-2783 Alan 2310 12th Street New York, NY 90078	

Ascii Delimited (by comma)
Ascii Delimited: " " " "
Ascii Delimited: ' ' ' '
Notebook
WP Secondary

Name and Address File

Press **Enter**. A list of your current Name & Address Files will display. Select the file you would like to add the converted records to and press **Enter**.

Text In	
File To Text In	: C:\DB\EMPLOYEE.WPS
File Format	: WP S
Name and Address File:	<ul style="list-style-type: none">Board Of DirectorsClientsEmployees - ActiveEmployees - RetiredVendors
Sample Data From File	
Alan Johnson	
256-2783	
Alan	
2310 12th Street	
New York, NY 90076	

Sample Data From File


A sample record from the file to be converted will display in this column.

Move Into Field

Press **Enter**. A list of the User Defined Fields in the selected Name & Address File will display.

Match the field names to the "Sample Data From File" by highlighting the Field Name and pressing **Enter**. Use the Up & Down Arrow keys to move through the list.

You may leave fields blank if there is data you do not want to bring into the new Name & Address File.

 *Mouse Note: To move above or below the displayed Field Names, place the pointer on the up or down arrow in the Field Names box and hold down the left button. The highlighted bar will move through the Field Names in the direction selected. Release the left button when you locate the Field Name you want and click the right button to select it.*

- 3 After you have matched up the Field Names to the sample data, press **Exit (F7)**. The conversion will begin and may take a few moments to complete, depending upon the size of the imported file.

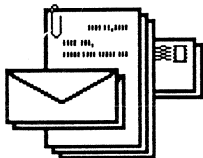
8

SAMPLE LIBRARY

CHAPTER 8 CONTENTS

Standard Business Letter 262
Phone List 264
Labels 266
Envelope 268

SAMPLE LIBRARY



The following pages consist of sample documents that you may find useful as guides for creating your own Standard Documents.

The method you use for setting up labels and envelopes may vary according to the version of WordPerfect you are using. Please refer to your WordPerfect manual for further information.

STANDARD BUSINESS LETTER

This document represents a standard business letter. It contains Database, Prompt and List fields. A [Field Name] is inserted at each point where *variable* information will appear, i.e. name and address, payment amount, due date, etc.

February 1, 1990

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

RE: Account No.: [Account Number]

Dear [Salutation]:

We have received your check, number [Check Number], in the amount of \$[Check Amount]. However, [Reason Returned]

Sincerely,

[Credit Manager]
Credit Manager

The following WordPerfect features are used in this letter:

- A Date Code is used so that the current date will automatically appear on the letter each time it is generated.
- The Center Page command is used to ensure that the letter is properly positioned no matter what the length of the inserted fields might be.

February 1, 1990

Ms. Hillary Johnson
Johnson Design Firm
290 West Avenue
Baltimore, MD 21236-7980

RE: Account No.:827689

Dear Ms. Johnson:

We received your check, number 8760, in the amount of \$325.00. However, you failed to endorse the check.

Please sign the enclosed check and send it to us at your earliest convenience.

Sincerely,

Tony Carlucci
Credit Manager

PHONE LIST

A phone list is a simple document to set up. The most important thing to remember is to insert an exclamation point (!) after each phone number field, [Phone No.!), except for the last one. This tells Perfect Complement to advance to the next record in the Name and Address File. Omitting the ! from the last field tells Perfect Complement to end the advancement for this page.

CLIENT PHONE LIST

<u>COMPANY</u>	<u>NAME</u>	<u>PHONE</u>
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.!]
[Company]	[Name]	[Phone No.]
[Company]	[Name]	[Phone No.]

The Standard Document should be a template for a full page. The Field Names should be repeated for the entire length of the page.

The Advance To command is used after each [Field Name] to ensure proper placement of each column.

CLIENT PHONE LIST

<u>COMPANY</u>	<u>NAME</u>	<u>PHONE</u>
Ace Advertising	John Shipley	301-433-0988
Bell Heating & Air	Arthur Adams	202-793-0966
Burman's Art Shop	Rita Burman	301-873-9211
Country Antiques	Karen Wills	301-653-2987
Dog & Cat Hospital	Pat Richards	703-988-2772
Fuller Moving Co.	Roger Hill	804-653-0922
Global Travel	Brenda Sykes	301-663-9377
Home Design, Inc.	Gregory Cann	301-772-6288
Joe's Plumbing Co.	Joe Wildeman	202-976-3939
King Carpet	Alex King	703-872-9772
Lawn Care, Inc.	Joan Harrison	202-874-7362
Light Design Co.	Tim Freeman	301-755-3321
Mighty Moving Co.	Henry Sampson	919-773-4277
Muller Paving	Alan Muller	717-873-8366
OK Auto Repair	Jim Davison	301-866-3986
Photo Finish	Bob Beemon	301-773-7563
Quick Copy Service	Laura Vance	814-973-0221
Reese Real Estate	Frank Unger	202-737-0012
Sam's Hardware	Phil Lumin	301-766-9222
Sunshine Flowers	Lisa Rivers	301-232-6464
Travel Unlimited	Donna Allen	804-387-2882
U-Save Storage	Walter Lutz	202-839-8309
Valley Realtors	Harry Blair	703-867-3289
Wallpaper Studio	Linda Langely	301-777-0838

LABELS

When creating a labels document, you must insert an exclamation point (!) at the end of the Zip Code field on each label except for the last label. The ! tells Perfect Complement to advance to the next record. Omitting the ! from the last label will end record advancement for that page.

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code!]

[Name]
[Company?]
[Address1]
[Address2?]
[City], [State] [Zip Code]

Type the group of Field Names for each label on the sheet.

The Columns feature in WordPerfect 5.0 is used to create this labels document. The Advance To feature is used to advance down to the next label. This ensures proper placement. In WordPerfect 5.1, you can use the Paper Size/Type definition to define a specific labels document. See your WordPerfect manual for more information on labels.

Donald Conner
ABC Printing
8327 Sycamore Drive
Suite 12B
Irvington, VA 32987

Barbara Dennis
Green Thumb Nursery
5451 Yellowstone Rd.
Philadelphia, PA 43887

Joseph Hartmann
Best Computer Supply
657 Drinkwater Lane
Suite 32
York, PA 18933

Thomas Collins
Home Designers
830 Belmont Rd.
Suite 10
Towson, MD 21204

Donna Wilkes
Cleaning Supply Company
219 Southgate Road
Baltimore, MD 21238

Dale Allanson
King Moving Co.
2109 W. 30th St.
Mobile, AL 56484

Peter Franklin
Dependable Delivery Service
10 W. Main Street
Roanoke, VA 39828

George Jenkins
Light Designs, Inc.
721 Depot Avenue
Suite 32
Baltimore, MD 21864

Howard Johnson
Flowers & Gifts
874 Roseland Avenue
Suite 47
Baltimore, MD 21093

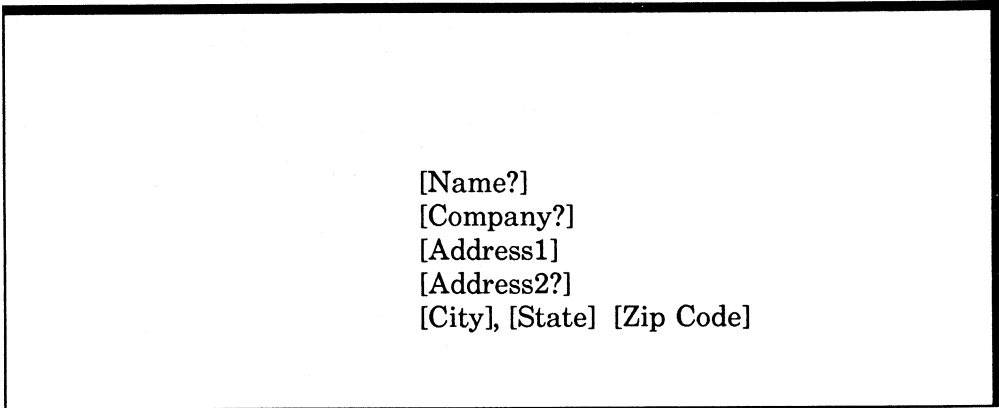
Sharon Griffin
Midway Storage Co.
645 Slipman Road
Denver, CO 78564

Angela Frost
Full Tank Fuel Supply
764 Rogers Road
Midland, TX 87333

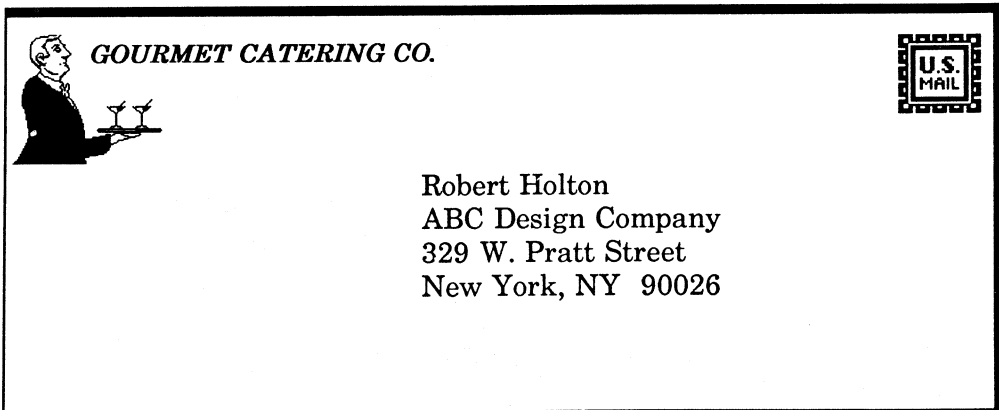
Arnold Chapman
Porter Plumbing
221 Clampett Ave.
Pittsburgh, PA 43875

ENVELOPE

The envelope used for this sample is a 9½" x 4" legal-size envelope.



The Advance To command was used to position the address fields both over and down.



The Paper Size/Type feature was used to define the envelope. WordPerfect 5.0 and 5.1 have this feature. Refer to your WordPerfect manual for more information.

APPENDIX

APPENDIX CONTENTS

- Converting From Version 1.2 to 2.0 A 5
- Customer Support A 9
- Error Messages A10
- Error Status Codes A15
- Fax Merge A19
- Perfect Complement Files A20
- Recovering Damaged Files A22

CONVERTING FROM VERSION 1.X TO 2.0

If you are presently working with Perfect Complement Version 1.x, the Utilities menu contains a Conversion program which will convert your 1.x files to Version 2.0.

You must perform steps 1-8 starting on page 6 of Chapter 1 - Installation & Setup before proceeding with the steps below.

The converted files will be placed in the same working directory as the old files (v1.x) so you will be able to use that directory for Version 2.0. The old files will have the extension .OLD.

BTRIEVE must be running to perform the Conversion procedure!

NOTE: BTRIEVE is no longer required to operate Perfect Complement, as in previous versions. However, it must be running for the Conversion program to work properly.

To load BTRIEVE:

- 1 Change to the directory where the Perfect Complement Version 1.2 files are installed.
- 2 At the prompt, type **BTRIEVE /P:3072**
- 3 Change to the directory that contains the Version 2.0 Installation files.

Once BTRIEVE is running, you are ready to perform the Conversion. Make sure you are in the Directory that contains the Utility program files!

- 1 At the DOS prompt, type **PCUTIL**.

2 From the Utilities menu, select **Convert Files From Version 1.x To Version 2.0**.

3 The screen below will appear. It explains what will happen during the Conversion.

```
This program will convert the data files from Perfect Complement v1.x
to Perfect Complement v2.0. The files will be changed as follows:

Perfect Complement v1.x                Perfect Complement v2.0
-----
dctnry.pc$ = dctnry.old -----|
libindx.pc$ = libindx.old -----| -->  library.pc$
class.pc$  = class.old  -----|

All the Name and Address files will be renamed with the extension '.old'
```

Continue? (Y/N)
No
Yes

Select **Yes** to proceed with the Conversion.

The time it takes to convert will depend on the number and size of your 1.x files. A counter on the screen will show the progress of the Conversion.

4 When the Conversion is complete, press **Esc**.

P. C. Conversion Program
Beginning Conversion ...

Converting DCTNRY.PC\$...

Converting CLASS.PC\$...

Converting LIBINDX.PC\$...

Converting Naf Files ...

Conversion Complete!
--Press <Esc> to continue--

It is recommended that you copy all of the .OLD files to a floppy diskette for backup purposes. You should then erase them from your hard drive or network drive to free up space for new files.

Once the Conversion is complete, you can unload BTRIEVE. This will make more memory available.

To unload BTRIEVE, simply reboot your computer. If you use BTRIEVE for Perfect Complement, you should delete it (BTRIEVE.EXE) from your disk to free disk space.

You are now ready to run Perfect Complement. Refer to *Starting Perfect Complement* on page 10 of the Reference Manual.

CONVERTING 1 NAME & ADDRESS FILE

You can convert a single Name & Address File from Version 1.x to Version 2.0. The converted file will be placed in the same working directory as the old file (v1.x) so you will be able to use that directory for Version 2.0. The old file will have the extension .OLD.

NOTE: BTRIEVE must be running to perform the conversion! (See page A5 of the Appendix for instructions on how to load BTRIEVE.)

Once BTRIEVE is running, you can perform the conversion procedure. Make sure you are in the Directory that contains the Utility program files!

- 1 At the DOS prompt, type **PCUTIL**.
- 2 From the Utilities menu, select **Convert Files From Version 1.x To Version 2.0**.
- 3 Enter the directory that contains the file you want to convert. A list of the Version 1.x NAF files in that directory will appear.

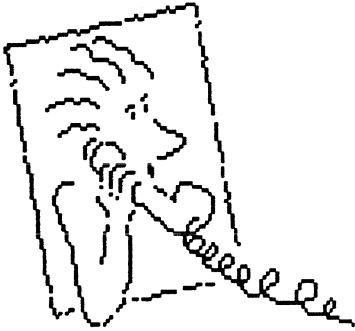
4 Select the file you want convert.

5 When the conversion is complete, press **Esc**.

It is recommended that you copy the .OLD file to a floppy diskette for backup purposes. You should then erase it from your hard drive or network drive to free up space for new files.

You may now run Perfect Complement. Refer to *Starting Perfect Complement* on page 10 of the Reference Manual.

CUSTOMER SUPPORT



Perfect Complement has a toll-free Technical Support number should you encounter any problems installing the program.

Technical Support is also available if you think you have encountered a "bug." If you cannot find the answer to the problem in the Reference Manual or with the Help key (F3), follow this procedure:

- If possible, duplicate the problem and note, keystroke by keystroke, exactly what was done. Note any Error Message(s) you may have received.
- Be at the computer when you call Technical Support so that we may step you through the appropriate procedures to resolve your problem.
- Have your Serial Number handy. The Support Technician will ask for this before giving assistance. The Serial Number can be found on your original Perfect Complement diskettes.

You may call for Installation & Technical Support **Monday through Friday between 8:30 am & 7:30 pm Eastern Standard Time.**

INSTALLATION SUPPORT: 1-800-444-9564

ERROR MESSAGES

This section contains Error Messages that you may encounter while using Perfect Complement. An explanation of the message and the corrective steps are provided.

Class/SubClass must be empty before deletion. The current operation cannot be completed.

You cannot delete a Class that has SubClasses or documents in it. You must delete all documents and SubClasses before you can delete a Class. If you want to delete a SubClass only, you must first delete all documents within that SubClass.

Error accessing External Database. Status = #.

This error is not normal and could indicate a problem with your computer. Call Perfect Complement Technical Support.

Error closing WordPerfect file.

This error is not normal and could indicate a problem with your computer. Call Perfect Complement Technical Support.

Error deleting Perfect Complement temporary file *filename*.

This error is not normal and could indicate a problem with your computer. Call Perfect Complement Technical Support.

Error during memory allocation.

There was not enough memory available for Perfect Complement to handle the current task. You may be able to free up some memory by removing unneeded drivers.

Error expecting closing bracket.

Check all field names in the Standard Document to be sure each has a right closing bracket. Also check that no field name is more than 20 characters long, including spaces but not including the brackets.

Error opening file *filename*.

Perfect Complement encountered an unexpected error while attempting to open the named file. Call Perfect Complement Technical Support.

Error opening WordPerfect file *filename*.

When adding Document PATH information in the Library, if the Drive:\ Directory\Filename differ in any way from the actual PATH, you will receive this Error Message. Check the PATH information and make any necessary corrections. You can use the F5 (List Files) key to display the WordPerfect document directory.

File *filename* has been corrupted in some way. This may indicate a hardware failure or a power failure with files left open.

If the filename has a .NAF or .PC\$ extension, you may be able to use the Perfect Complement Utilities **Rebuild Damaged File** function to recover the file. If the filename does not have a .NAF or .PC\$ extension, call Perfect Complement Technical Support.

File/Table conflict Error encountered at field *field name*. All fields must be from the same File/Table.

The field name is from a different file or table than the fields referenced before it. Check to make certain that all fields are from the same file or table.

Mismatched parentheses.

This error message will occur if the parentheses in a Selection Criteria entry do not correspond. Make certain each (has a corresponding), or vice versa.

Missing closing bracket or field name exceeds 20 characters detected at *field name*. Make correction to document and try again.

Check the document to be sure all field names have a right closing bracket -]. Also check that no field names are longer than 20 characters, including spaces but not including the brackets.

There are no choices available for list field *field name*.

When you want to use a List Field in your document, you must create a WordPerfect File for each item on the List. The file should contain the actual text that will be inserted into the document. The List Field must also be defined in the Library. Refer to Chapter 4 for entry instructions. If there are no choices (files) defined for the List Field, this error message will occur.

This field is secure and cannot be edited.

This error message will appear if you try to edit a data entry form or field menu while in the View mode. You must go into the Change mode to make changes to a Data Entry Form or field menu. Use Retrieve (Shift-F10) instead of Enter to go into the Change mode.

Unable to access more than one database file per letter.

The fields in the selected document reference more than one database file. Check the database fields in the document to ensure they are from the same database file.

Warning!! Unresolved field names. Program execution should continue normally.

This message is just a warning that undefined field names exist in your Standard Document. To enter the field name definitions for the undefined fields refer to *Resolving Undefined Field Names* on page 114.)

ERROR STATUS CODES

The following is a list of Error Status Codes that will appear with various Error Messages. An explanation of the Status Code and the corrective steps are provided. If these steps do not resolve the problem, please call Perfect Complement Technical Support.

00 Error finding maximum length of environment

Incompatible or corrupt DOS environment.

01 No "PATH =" in environment

To use Perfect Complement, you must set the DOS PATH command to include at least the Perfect Complement program directory. We suggest that the PATH be set in your AUTOEXEC.BAT file and also include your DOS directory. For more information on PATH, see your DOS manual.

02 Error finding maximum length of PATH

Call Perfect Complement Technical Support.

03 PATH does not contain directory where PC.EXE is located

Your PATH command does not include the Perfect Complement "program" directory. You will need to add this directory to your PATH to use Perfect Complement.

04 Same as 03

See 03 on above.

05 Error opening {PC\$00.CFG

Call Perfect Complement Technical Support.

06 Error reading {PC\$00.CFG

Call Perfect Complement Technical Support.

07 Error reading {PC\$00.CFG

Call Perfect Complement Technical Support.

08 Error closing {PC\$00.CFG

Call Perfect Complement Technical Support.

11 Invalid function

Serious execution error - reboot and reload .EXE files from backup.

12 File not found (WP.EXE)

Perfect Complement cannot find the WordPerfect program file WP.EXE. See #13 below for corrective steps.

13 Path not found (Path to WP.EXE)

The path to the WordPerfect program file WP.EXE is incorrect. Verify the location of this file then check the Perfect Complement Setup screen to be sure the location entered is correct. To check the Setup, at the Main Menu press Shift-F1. Select WordPerfect Executable. Make any necessary changes.

14 Access denied

DOS attribute or network security is prohibiting access to a file.

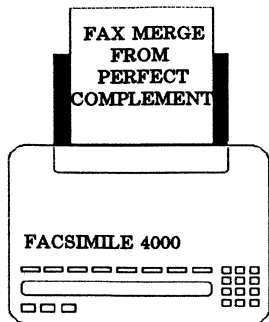
15 Insufficient memory

There is not enough available RAM to complete execution.

16 Bad environment

The DOS environment is corrupt. Reboot and try again. If the error persists, call Perfect Complement Technical Support.

FAX MERGE



Perfect Complement's **Fax Merge** feature will let you merge documents directly to a fax board installed in your computer for transmission to another computer similarly equipped. To use this feature, you **must** have an Intel Connection CoProcessor™ installed in your computer.

Refer to *Fax Merge Configuration* on page 16 of the Reference Manual for instructions regarding the Fax Merge setup.

PERFECT COMPLEMENT FILES

Below is a list of the files contained in archived files on the Perfect Complement diskettes:

AUTOLARC.BAT	Installation Batch File
B&W\$PC.OVL	Monochrome Overlay File
CLR\$PC.OVL	Color Overlay File
IBM\$PC.OVL	Overlay File for Netware
LIBRARY.DAT	Initialized Library File
NAFMAIN.EXE	Name & Address Program Main
PC\$ERR.DAT	Error Message Data File
PC\$HELP.DAT	System Level Help Messages
PC\$MESSG.DAT	Message Data File
PC.EXE	Perfect Complement Resident Shell
PC.HLP	Help Screen Data File
PCMAIN.EXE	Perfect Complement Program Main
PCUTIL.EXE	Utilities Program Main
\$PC.OVL	Overlay File

The SAMPLES directory contains several Sample Document files. The REPORTS directory, there are document files used for creating the Library Reports.

RECOVERING DAMAGED FILES

The Recover Damaged File function found on the Utilities menu will restore files (C-Index or .NAF) that might be damaged by abnormal program termination or by media failure. You must have enough disk space for two copies of the file being recovered, the original file and the rebuilt file.

If media failure caused the file to be damaged, the failing disk sector must be rewritten first using a file recovery routine that **will not** remove any sectors from the file. Do not use the DOS Recover program or the Norton Utility Recovery routines. These will remove bad sectors from the file and cause inaccurate file addressing.

To *rebuild* a damaged file:

- 1 At the DOS prompt, change to the directory that contains the Perfect Complement program files (i.e. PCUTIL.EXE).
- 2 Type **PCUTIL**. The Utilities menu appears.
- 3 Select **Recover Damaged File** from the Utilities menu.
- 4 Respond to the prompts.
- 5 When the recovery process is complete, press **Esc**.

If there were no errors found in the original file, that file will be deleted and only the new, rebuilt file is saved. If there were errors (incomplete records), those records will be in a file with the extension **.ERR**. You can type out these files to see which records are bad. The original damaged file will be deleted and the rebuilt file is saved.

GLOSSARY

- Castaway** Used with the Name Search feature, a Castaway is a word that will not necessarily help to locate a name or company. Examples of Castaways are INC, CORP, CO, MR, MRS, and THE. When included in the Castaway List, these words will be eliminated from the search process.
- Class** Headings that Standard Documents are stored under in the Library.
- Data Entry Form** Displayed when information must be entered from the keyboard. Library information about documents, fields, name & address files, external databases, and selection criteria are kept in Data Entry Forms.
- Database Field** Contained within brackets [] in a Standard Document, it tells Perfect Complement to extract the specified information from a database.
- Field Name** Contained within brackets [] in a Standard Document, a Field Name is placed where there will be variable information in the document. There are three types of Field Names: Database, Prompt & List. A Database Field Name references information contained in a database; a Prompt Field Name will tell the user to enter information from the keyboard; a List Field Name will display a list of optional text for the user to select from for insertion into the document.
- List Field** Will cause a pop-up menu of optional WordPerfect text to be displayed during generation. The user selects from this list for insertion into the document.
- Menu** Displayed whenever Perfect Complement wants you to select from a list of options.
- Menu Selection Bar** Highlights menu items. It is moved by using the arrow keys or by typing the first letter of the menu item.

<u>Prompt Field</u>	Contained within brackets [] in the Standard Document, it will cause Perfect Complement to display a Data Entry Form for keyboard input of data. The typed data will be automatically inserted into the generated document.
<u>Read-Only</u>	Files that can only be read from. No changes or deletions can be made.
<u>Record</u>	Each person's information contained in a Name & Address File is called a record. Each record contains the User-Defined Fields for one individual.
<u>Rule</u>	The combination of all the fields in the Selection Criteria Data Entry Form.
<u>Selection Criteria</u>	Allows you to set rules for selecting name and address records from a file.
<u>User-Defined Field</u>	Added by the user to customize a Name & Address File.

INDEX

A

ADDING FIELDS 212
ADMINISTRATOR 24
 NAME 24
 PASSWORD 24
ADVANCING RECORDS 61
AND 166
ASCII CHARACTERS 11
 MAPPING 11
AUTOMATIC SELECTION 177
 DISABLING 179
 ENABLING 177
AUTORECEIVE 19
 DISABLING 19
 ENABLING 19
AUXILIARY FILES 22

B

BASIC FIELDS 201, 210
 ADDRESS 221
 CITY 221
 COMPANY 220
 FAX 221
 NAME 220
 PHONE NO. 221
 SALUTATION 221
 STATE 221
 TITLE 220
BTRIEVE see Appendix page A5
 LOADING see Appendix page
 A5
 UNLOADING see Appendix
 page A7

C

CASTAWAY 235
 ADDING 235

 DELETING 238
 MODIFYING 236
CASTAWAY LIST 235
CHARACTER SET MAP 11
 CHANGE ENTRY 15
 CREATING 12
 DELETE ENTRY 15
CLASS
 ADDING 77
 ADDING DOCUMENTS TO 85
 CHANGING DESCRIPTION 78, 83
 REMOVING 79, 84
CONDITION 163
CONVERSION
 ASCII DELIMITED FILES 251
 NAME & ADDRESS FILES 251
 VERSION 1.2 TO 2.0 see
 Appendix page A5
WORDPERFECT NOTEBOOK
 FILES 251
WORDPERFECT SECONDARY
 FILES 251
CURRENCY 21
 INTERNATIONAL FORMAT 21
CUSTOMER SUPPORT see
 Appendix page A9

D

DAMAGED FILES
 RECOVERING see Appendix
 page A22
DATA ENTRY FORM 41
DATA LENGTH 145
DATA TYPE 143
 AMOUNT 143
 DATE 143
 NUMERIC 144
 PARAGRAPH 144

TEXT 144
DATABASE FIELD 63, 136, 162
 ADDING 134
 CHANGING 138
 REMOVING 138
 VIEWING 137
DATABASE FIELDS 132
 CROSS REFERENCE 74
DATABASE NAME 136, 162
DATABASE TYPE 136
DIRECTORY 6
 INSTALL 6
 WORKING 9
DOCUMENT 49
 ADD TO A CLASS 85
 ADD TO A SUBCLASS 91
 INFORMATION 98
 MAINTENANCE MENU 97
 REMOVING 100
 VIEWING 96
DOCUMENT CLASS 77
 ADDING 77
 CHANGE DESCRIPTION 78,
 83
 REMOVING 79, 84
DOCUMENT MAINTENANCE
 85
DOCUMENT SET 101
 ADDING 102
 CHANGE DOCUMENTS 112
 CONTENTS 112
 DELETE DOCUMENTS 112
 INFORMATION 110
DUPLICATE CHECK 205
 DISABLING 205
 ENABLING 205

E

END 166
ENTER KEY 23
 CONFIGURE 23

ENTRY FORMAT 207
 CANADIAN 207
 U.S. 207
ERROR MESSAGES see Appendix
 page A10
ERROR STATUS CODES see
 Appendix A15
EXPRESSION 165
 AND 166
 END 166
 OR 166
EXTERNAL DATABASE 49
 FIELDS 132
 LOTUS 1-2-3 122
 SELECTING DATA 190

F

FAX MERGE see Appendix page A19
 SETUP 16
FIELD DESCRIPTION 137
FIELD NAME 135, 142, 151
FIELD NAMES 55, 63
 LISTING OF 74
FIELD SELECTION BAR 41
FIELDS MENU 210
 GETTING TO 211
FIELDS REFERENCED 98
FILE CONVERSION 251
FORMAT 20
 CANADIAN 20
 UNITED STATES 20

G

GENERATE DOCUMENTS 48,
 181
GLOBAL PROMPT 143, 190

H

HELP 46

I _____

INSTALLATION 5
 NETWORK 6
INTERNATIONAL
 CONFIGURATION 20
 COUNTRY 20
 CURRENCY 21
CONFIGURATIONS 11

J _____

K _____

KEYS 42
 ARROW KEYS 43
 CANCEL 45
 DELETE 44
 END 44
 ENTER 42
 ESC 42
 EXIT 42
 HELP 46
 HOME 44
 INSERT 44
 MARK 45
 PAGE 44
 RETRIEVE 43

L _____

LEVEL WINDOW 40
LIBRARY 49, 73
 REPORTS 74
LIBRARY MAINTENANCE 27
 DISABLING 27
LIBRARY REPORTS 74
LIST DESCRIPTION 152
LIST FIELD 63
 ADDING 150
 CHANGING 153

 REMOVING 154
 VIEWING 153
 WORDPERFECT FILE 152
LIST FIELDS 49, 147
 SUMMARY 74
LIST HEADING 151
LIST TYPE 151
LOTUS 1-2-3 122
 CELLS 126
 DATABASE 122
 RANGE 126

M _____

MAIN MENU 48
MAINTAIN LIBRARY 49
MARK 45
MENU FIELDS 223
 SELECTING FROM 223
 USING 223
MENU SELECTION BAR 38
MENUS 38
MOUSE SUPPORT 47

N _____

NAME & ADDRESS FILE 50, 197,
 201
 ADDING 202
 CHANGING 208
 DESCRIPTION 203
 FIELDS 133
 LOCATION 202
 REMOVING 209
NAME & ADDRESS FILE
 CONVERSION 251
NAME & ADDRESS
 RECORD 218
 ADDING 219
 CHANGING 227
 REMOVING 228
 VIEWING 226

NAME SEARCH 230
 DISABLING 204
 ENABLING 204
 PERFORMING 230
NETWORK 6

O _____

OR 166

P _____

PASSWORD 22
 ADDING 24
 CHANGING 26
 ENTERING 23
PC\$ 10
PER LETTER PROMPT 143, 195
PERFECT COMPLEMENT
 DIRECTORY 9
 FILES see Appendix page A20
 RUNNING 10
PREFERENCES 23
PRINTING DOCUMENTS 196
PROMPT 142
PROMPT FIELD 63, 140
 ADDING 142
 CHANGING 146
 REMOVING 146
 VIEWING 145
PROMPT FIELDS 140
 SUMMARY 74
PROMPT TYPE 143

Q _____

QUICK MERGE 185

R _____

RECOVER DAMAGED FILE see
 Appendix page A22

RULES 167
 INSERTING 167
 REMOVING 167

S _____

SAMPLE LIBRARY 257, 261
 ENVELOPE 268
 LABELS 266
 PHONE LIST 264
 STANDARD BUSINESS
 LETTER 262
SCREEN 211
SCREENS 222
 MOVING BETWEEN 222
 MOVING WITHIN 222
SECURITY 24
 ACTIVATING 24
 ADDING A PASSWORD 24, 25
 ADDING A USER NAME 25
 ADMINISTRATOR 24
 CHANGING A PASSWORD 27
 CHANGING A USER NAME
 26
 DELETING A USER NAME 27
 DISABLING 29
 DISABLING LIBRARY
 MAINTENANCE 28
SELECTION CRITERIA 49, 155,
 191
 ADDING 161
 AUTOMATIC SELECTION 177
 CHANGING 168
 DESCRIPTION 162
 REMOVING 168
 SORT, USING WITH 172
 VIEWING 167
SETUP 45
 CONFIGURATIONS 11
SORT 170
 ASCENDING 170

DESCENDING 170
DISABLING 175
SELECTION CRITERIA 172
SORT CRITERIA 170
 ADDING 170
 CHANGING 175
STANDARD DOCUMENT 49
 CREATING 62
STANDARD DOCUMENTS 55,
 76
SUBCLASS
 ADDING 80
 ADDING DOCUMENTS 91
SUPPRESSING BLANK
 LINES 60

T _____

TECHNICAL SUPPORT see
 Appendix page A9
TEXT IN 252

U _____

UNDEFINED FIELD NAMES 98
USER DEFINED FIELDS 210
 ADDING 212
 AMOUNT 213
 CHANGING 216
 DATE 213
 FAX 213
 LENGTH 215
 NUMERIC 214
 PARAGRAPH 214
 PHONE 214
 POSTAL CODE 214
 REMOVING 216
 SSN 214
 TEXT 214
 ZIP CODE 214

MENU 213
NAME 214
USER NAME 25
 ADDING 25
 CHANGING 26
 DELETING 27
UTILITIES PROGRAM 6
 STARTING 7

V _____

VALUE 164

W _____

WORDPERFECT 50
 CHARACTERS 11
 EXECUTABLE 31
 FILES 30
 LOCATION 30
 VERSION 31
WORDPERFECT ID 30
 CHANGING 30
 LENGTH 30
WORDPERFECT TEXT 99
WORKING DIRECTORY 9

