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Layouts

The word "layout" is used in PRIMO to mean a document that is pre-formatted for merging purposes. The words "template" or "shell" can also be used instead of "layout". A layout can include formatted text, company logos and letterheads.

In PRIMO, layouts can include merge fields (specific text that is replaced by data from the database when PRIMO merges the layout). Merge fields are especially useful when dealing with greetings, addresses and property data. If information has been properly entered into a record, and you use merge fields as well as formatted text to create an offer letter or a fact sheet, your documents will be ready to print in little or no time. Before printing you may want to read over the document to make any final adjustments.

Certain layouts can be used as sub-layouts, that is a layout inserted in another layout.

Layouts can also vary by:

- Type: Letters, Fact Sheets, Text macros, ...
- Section of the database from which the merge fields are taken: Organisation, Contact and Properties...

This chapter opens with an overview of the possible uses of layouts, and how they differ in content depending upon the section of PRIMO used to create them. The creation and possible uses of PRIMO are then explained in detail and one example at a time.

Overview

Layouts accelerate, simplify and standardise the creation of documents that need to be generated in a specific way time and time again. Therefore, taking the time to prepare a layout will save you a lot of time in the long run.

When you create a layout you are actually creating a partly or fully-formatted shell that, once merged with information from the database, will produce a document that will always look the same in form, but not necessarily in content. A layout may contain:

- fixed text and graphics - text and graphics that are not usually replaced by data when the layout is merged. Examples include, a company logo, the body of a letter or mail-shot, the titles and headings of fact sheets, commission rules and disclaimers.
- replaceable text or "merge fields" - text inserted between double pointed brackets («...») and replaced with data from the PRIMO database when the layout is merged. Merge fields are used, for example, in the case of dates, addresses, greetings, the name of the agent sending the letter or offer, and property details in the case of a fact sheet.
- sub-layouts - layouts that are inserted into other layouts. This is the best way of listing property information in an offer letter.
- Text macros - layouts containing specific text added, as needed, to another layout through the insertion of a text macro merge field (e.g. body of a letter, greetings, closings, company mottos, etc.).

Merge fields are flexible tools. You can:

- format them,
- additionally format expanded merge fields (e.g. you can format numbers with or without commas and format the date to your liking),
- use "if-then" (conditional) merge fields which will insert specific data depending upon the situation when the layout is merged.

A document created from a layout can be edited just like any other document. Additionally, text macros can be used whenever necessary.

When you create a layout, you must decide ahead of time what purpose the layout is going to serve. You must choose which section of PRIMO the layout is being created for and what type of layout you need (e.g. to create a fact sheet layout you must use data from the Property section and you must select the layout type "fact sheet"). This concept is explained in more detail in the following paragraphs.

Layout Sections

Choosing a section from the "Section" drop down list allows PRIMO to save the layout you have created to that section, as well as lets PRIMO know what type of record to use when replacing the merge fields in the layout with data. Whenever you choose a section,

PRIMO puts the appropriate merge fields for that section at your disposal to help with the creation of the layout. The available sections are:

- Organisation: used for mail-shots or letters sent to an organisation with no known contact,
- Contact: used for standard letters and mail-shots sent to a particular person,
- Property: used for property-related documents (e.g. fact sheets) and sub-layouts (usually property descriptions added to an offer letter).
- Offer: used to create offer layouts for Properties and Requirements, with merge fields for Contacts and sub-layouts "imported" from the Property section.

→ **Tip:**

Future versions of PRIMO will enable the use of two additional sections: Requirements and Print-frames.

It is not always necessary or useful to link a layout to a section of PRIMO. For example text macros are independent of any section.

Finally, layouts that are not linked to a section can still contain time, date and PRIMO user names merge fields.

Layout Types

Selecting a layout type from the "Type" drop down list helps you define what the layout will be used for:

- Disclaimer: allows you to add a disclaimer with any document you send out,
- Letter: general correspondence, including offers,
- Fact Sheet: all property-related documents including offer text and sub-layouts,
- Macro: text macros that can be inserted into layouts of all types and linked to any section.

Understanding, Creating and Using Layouts

→ **Tip:**

The right to create and modify layouts is not automatic. Each PRIMO user must be given that right by the Program Administrator. Program Administrators, also, cannot create and modify layouts if they do not give themselves the right to do so.

Layouts are created and formatted using PRIMO's integrated word-processor. Any layout you create is saved into the PRIMO database and is loaded from there whenever you use it or open it to modify it.

- To create a new layout select "New Layout" from the File menu. This will open the PRIMO word-processor and a blank, new layout.
- Selecting "Open Layout" from the File menu will open a *Layout Search and List* window which allows you to search for an existing layout. To learn how to use a *Search*

and List window see the section entitled “Search and List Windows”, Chapter 1, “Basic Functions”, page 1-17.

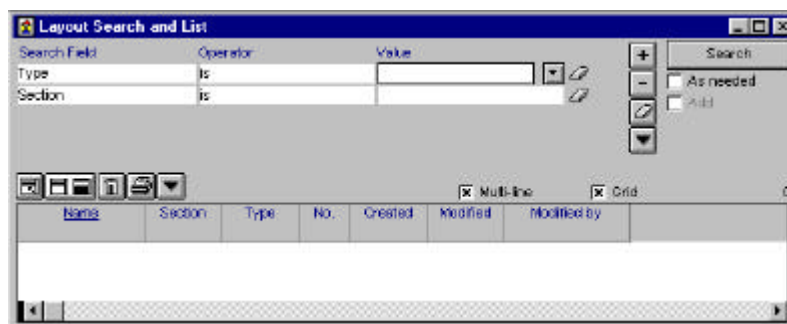


Fig. 13-1: *Layout Search and List Window*

Whether you are creating a new layout or opening an existing one, in both cases the word-processor window that opens will look as follows:

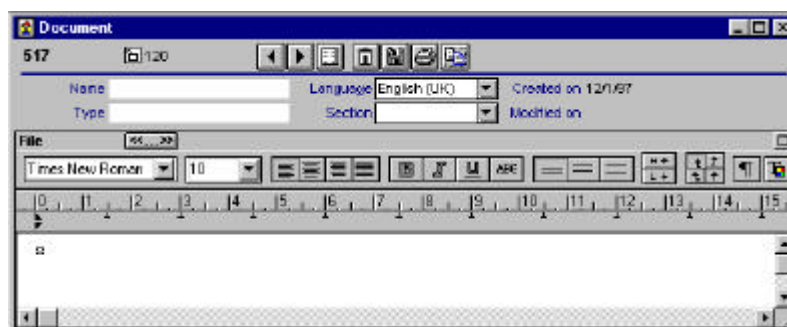


Fig. 13-2: “New Layout” Word-Processor Window

Creating a Layout

To create a new layout proceed as follows:

- ✓ **Prerequisite:**
You selected “New Layout” from the File menu and a blank layout document entitled “Document” is now open.
- 1. Give the layout an appropriate name depending upon its future use (e.g. Letter to existing clients vs. Letter to potential clients). Remember that you will need to recognise this layout from the others when the time comes to select a layout from a list of possible choices.
- 2. Choose a layout type from the “Type” drop down list.
- 3. Select the section you would like the layout to be linked to. This is especially useful if you are going to use merge fields, as it will tell PRIMO with which data to replace the merge fields. Also, it is useful to link a layout to a section, since whenever you

wish to create a document from that section, you are given a choice of layouts for that section only. If the layout you are creating does not contain merge fields, you should still link it to a section to help you categorise your documents.

4. To set the tabs and document margins choose "Document Format" from the word-processor File menu. (The File menu is located directly above the font drop down list.) Enter the values you require in the "Document Format" window and click on "OK".
5. Select a font and font size from the appropriate drop down lists located on the word-processor toolbar.
6. Enter and format text in the word-processor as you would with any other word-processor.

For more information on how to format a document using PRIMO's word-processor see [Chapter 9, "Word-Processor"](#).

7. Click on the "«...»" button, which is located to the right of the word-processor File menu, and select the appropriate merge fields from the dialogue box (cf. [section entitled "Merge Fields" in this chapter, page 13-6](#)).
8. Save and close the layout.

➔ **Tip:**

A layout can be used as soon as it is saved. You need not close the word-processor nor the layout when you wish to use it. In fact, it is usually a good idea when you have just created a layout to save it, leave it open and try to create a document using the layout. That way, once the layout is merged, you can go back to the open layout and make any necessary modifications. Note that as long as you do not save changes you have brought to a layout, PRIMO will use the previously saved version when merging.



Important:

Do not give a layout the same name-type as the document types available on the *Property:Documents* page. If you do want to save a layout using the same name, for example, "Offer Text", then we suggest you add to the layout name the type of Offer Text layout you are creating or even which department the layout applies to. This would give you the following type of name: "London_Offer Text" or "Retail_Offer Text".

Duplicating an Existing Layout

You may wish to create a layout that is very similar to an existing one. Instead of creating a brand new layout, duplicate the one you wish to use as a template and make the necessary modifications to the copied layout.

To copy a layout, proceed as follows:



Prerequisite:

You have opened the layout you wish to duplicate.

1. Click on the "copy" icon (icon depicting two documents) located to the right of the "printer" icon on the Layout toolbar.

The copied layout appears in the word-processor in place of the layout you used to create the copy. The new layout will be linked to the same section and be of the same layout type as the layout it was copied from. The new layout is given the same name as the one it was copied from, but a "(2)" is added to the end of the name.

2. Replace the name that PRIMO has given your new layout with a more appropriate one.
3. Modify the layout as required.



Important:

Before new merge fields can be inserted in the duplicated layout, you must save, close the layout, then open it again.

4. Save the new layout.

You may use the new layout as soon as you have saved it. You should, however, test the layout before closing it to make sure everything works as it should.

Merge Fields

Merge fields are used by PRIMO to insert data from the PRIMO database into a document. Merge fields are automatically replaced with data when a layout is merged. Current, context-dependent values are used in each case (e.g. property details, a contact's address and the date).

Property sub-layouts can be inserted into Offer layouts so that once merged the Offer layout will display a short description of the Properties being offered. Instead of creating a sub-layout to contain the Property information required, the sub-layout can be linked to an appropriate Property document.

To insert merge fields proceed as follows (merge fields are explained in more detail a little later in this section):

✓ **Prerequisite:**

You have created a new layout and have assigned it to a section of PRIMO, or not, depending on what you intend to use the layout for. You have placed the cursor at the point in the layout where you would like to insert a merge field.

1. Click on the "merge field" button ("«...»") located to the right of the word-processor File menu.

A dialogue box opens with a list of available merge fields (the merge fields available will depend upon the section, if any, that you have linked to the layout).

The dialogue box (depending on the merge fields available to you) will look as follows:

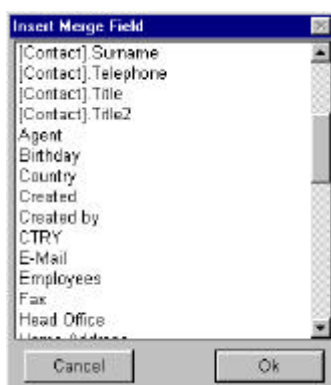


Fig. 13-3: Dialogue Box: Insert Merge Field

- At the top of the “Insert Merge Field” dialogue box is a list of merge fields representing specific PRIMO data entry fields. The list of merge fields that are available will depend on the section of PRIMO that you have linked your layout to. The merge field names listed in the dialogue box correspond to the names of PRIMO data entry fields.
- If you are creating a layout and have assigned it to the Offer section, after the list of available “Offer” merge fields will be a merge field entitled “@Layoutname”. This merge field is only available to the Offer section of PRIMO. It allows you to insert a sub-layout into your Offer layout. Once you have inserted the merge field into the Offer layout, change the word “Layoutname” to the name of the sub-layout you would like to insert. The “at” sign (“@”) must remain in front of the layout name and between double pointed brackets. No other suffixes or prefixes can be added to this merge field. The sub-layout merge field looks as follows:

«@Layout name»

- If you are creating a layout and have assigned it to the Property section of PRIMO, after the list of available “Property” merge fields will be a list of Property document merge fields. These merge fields are only available to the Property section of PRIMO. They allow you to insert a Property document into your Property layout. The “at” sign (“@”) must remain in front of the Property document name and between double pointed brackets. No other suffixes or prefixes can be added to this merge field. The Property document merge field looks as follows:

«@Property document name»

- Listed below the “@Layoutname” or “@Property document” merge fields, are merge fields that are available whether you assign a layout to a section of PRIMO or not. These merge fields will insert the correct date, time, PRIMO user and page number when the layout is merged.

➔ **Tip:**

When putting together conditional clauses, use one of the following statements: «IF:»«ENDIF» or «IF:»«ELSE»«ENDIF». You must ensure that to every «IF:»

there is a matching «ENDIF» to close the statement, and that every «ELSE» is framed by an «IF:» and an «ENDIF».

2. Select the required merge field and click on "OK".

The merge field will be inserted where you had placed your cursor and will appear between double pointed brackets:

```
«merge field»
```



Important:

PRIMO merge fields are modifiable (unlike MSWord®). Be careful not to inadvertently change the merge field in any way or it will not merge properly. If a merge field is modified, the best thing to do is delete it completely and re-select the correct one from the "Insert Merge Field" dialogue box.

→ **Tip:**

The merge field names must be linked to the section of PRIMO that you are using to create your layout. When inserted into a layout, the merge fields must appear exactly as they do in the "Insert Merge Field" dialogue box (right down to the brackets, full stops, small letters and capitals). No spaces are allowed and the merge fields must be between double pointed brackets. If these brackets are not available on your keyboard then you have the option of inserting them into your layout using their numeric code. You may do this using the numeric keypad, but remember to first turn the "Num Lock" on. To insert double pointed brackets using their numeric code, place the cursor in the section of the layout where you would like the bracket to appear and type:

Alt + 174 to obtain a starting pointed double bracket : «

Alt + 175 to obtain a closing pointed double bracket : »

Make sure that you use a font that contains this character.

→ **Tip:**

Use the Windows Character Map accessory to discover the keyboard short-cut specific to your operating environment.

Basic Merge Fields

Basic merge fields are usually field names that are replaced with data from those particular fields when the layout is merged into a document. Basic merge fields take the following form:

```
«merge field»
```

Merge fields are always placed between double pointed brackets («...»), since this is what tells PRIMO where the merge field begins and ends.

Some merge fields contain a prefix followed by a full-stop then the field name (e.g. [Contact].Telephone)

```
«Prefix.Field name»
```

Prefixes are used to lessen the confusion when replacing merge fields with data from records with the same field names (e.g. a Contact record has "Telephone" and "Name" fields and so does an Organisation record). The prefix tells PRIMO which record to use when replacing a merge field with data.

Merge Fields with Suffixes

Suffixes may be added to certain merge fields. Suffixes contain information to help format the data that replaces the merge fields at the time of merging. Suffixes are preceded by a colon, and no space. All suffixes must be written in CAPITAL LETTERS.

A merge field with a suffix will look like this:

```
«merge field:SUFFIX»
```

There are three categories of merge fields to which a suffix can be added:

- Dates,
- Numbers,
- PRIMO user names.

Formatting Dates

Formatted dates will usually look as follows when still in merge field form:

```
«Date merge field:[FORMAT1]Text[FORMAT2]...»
```

A date can be customised using various formatting strings. In fact, it can be formatted down to where every space, dash, period, comma and text insert should go. Text added to the suffix can be in upper and lower case, however, all formatting must appear between square brackets and should contain no spaces.

The following formatting is available for date merge fields:

Date Type	Format	Value Displayed
Day	[D]	6 21
	[DD]	06 21
	[DAY]	Saturday
Month	[M]	9 11
	[MM]	09 11
	[MON]	September
Year	[Y]	96
	[YY]	96
	[YYYY]	1996

Example:

Desired Format	Merge Fields with Suffixes
03.05.1996	«.D.Date:[DD].[MM].[YYYY]»
Saturday, 10th November 1996	«.D.Date:[DAY], [D]th [MON] [YYYY]»

Formatting Numbers

There are two ways of formatting numbers:

- «Number merge field:L» for number formatting using decimals
- «Number merge field:K» for number formatting without decimals.

Example:

(Make sure that text such as "£" and "m2" is inserted before or after the merge field, since it is part of the layout and not the number formatting)

Desired Format	Merge Fields with Suffixes
£27 Million	£«Price-Mill:K» Million
1240.50 m2	«Total m2:L» m2

Formatting PRIMO User Names

There are three merge fields available for PRIMO user names. They are, «Agent», «Referred by» and «.S.User». Various suffixes exist to format these merge fields. In each case the suffix must be added after the merge field preceded by a colon and no space.

Format	Resulting Value	Resulting Value
KNAME	Mrs. Murray	Mr. Harrington
*KNAME-N	Frau Graf	Herrn Fachinger
LNAME	Mrs. Joan Murray	Mr. Andrew Harrington
*LNAME-N	Frau Johanna Graf	Herrn Andreas Fachin*0ger
NAME	Joan Murray	Andrew Harrington
NAME1	Joan	Andrew
NAME2	Murray	Harrington
TITLE	Mrs.	Mr.
INITIALS	JM	AH
TELEPHONE	0171 569 7859	0171 569 7858

The "INITIALS" and "EXT" suffixes are only available if the Program Administrator has entered them in each PRIMO User record.

The two format examples preceded by an asterisk (*) are used in German formatting. If this type of formatting does not apply to you and you use it, the result will be the same as when you use the LNAME and KNAME formats.

Example:

Desired Format

Text, Merge Fields and Suffixes

as discussed with Mr. Murray

as discussed with «Agent:KNAME»

You can reach Mrs. Joan Murray at 0171 569 7859.

You can reach «Agent:LNAME» at «Agent:TELEPHONE».

Conditional Merge Fields

In many cases, you will require merge fields that react differently depending upon the data that appears (or does not appear) once the merge fields are merged. For example, you may want to inform PRIMO that if a record has certain data available, to insert it in the place of the merge field, but if the data is not available, to replace it with some other information, or to leave a blank space.

For Example, the line showing the total surface of a property should only appear in a fact sheet if the information is available. Also, if VAT is to be added to a property's sale price, then this information should be added to an offer you are sending to a client so that the client can better calculate the amount needed to buy the property

From the above we can determine that conditional merge fields are used in two situations:

- To avoid fragments of text that make no sense and semi-empty lines. In this case we would write a conditional clause that a merge field should only be replaced if data exists to replace it, otherwise that space should remain blank.
- To enable PRIMO to choose between more than one set of data. By using a conditional clause in this case, you are asking PRIMO to choose which data best fits the situation at hand.

Two general forms of conditional merge fields are available to you for the above situations.

```
«IF:Condition»Phrase«ENDIF»
```

```
«IF:Condition»Phrase«ELSE»Then2«ENDIF»
```

The «IF:»«ELSE» and «ENDIF» conditional clauses used by PRIMO are found in all computer languages and in all programs allowing the use of conditional clauses.

→ Tip:

When putting together conditional clauses, use a complete statement: «IF:»«ENDIF» or «IF:»«ELSE»«ENDIF». This guarantees that to every «IF:» there

is one «ENDIF» to close the string, and that every «ELSE» is framed by an «IF:» and an «ENDIF».

It is possible to embed a second conditional statement into a first conditional statement. The embedding can occur in both types of conditional statements described above:

```
«IF:Condition1»Phrase1«ELSE»«IF:Condition2»Phrase2
«ENDIF»«ENDIF»
```

Conditional Statements

A basic conditional statement is either "true" or "false". That is, the information you have requested either meets or does not meet your request. Whenever you enter search criteria in a *Search and List* window you are actually asking PRIMO to answer a basic "true" or "false" question. By contrast, conditional statements added to a layout can be more complex.

→ Tip:

When turning a merge field into a conditional clause, remove the double pointed brackets surrounding the merge field and insert the merge field text inside the «IF:» clause double pointed brackets. The clause should look as follows «IF:merge field».

Conditional Statement 1:

A conditional statement is formulated by comparing data from a record to a specific value (e.g. property size *is greater than* 700m² or purchase price *is not greater than* £100 000). This type of statement should be formatted as follows:

```
Basic merge field Comparison operator Comparison value
```

The following comparison operators are available:

Operator	Meaning
=	is
<	is less than
<=	is less than/equal to
>	is greater than
>=	is greater than/equal to
<>	is not
!=	is not
?>	is contained in
?<	contains

Additional comparison operators are described in the [section entitled "Search Criteria", Chapter 1, "Basic Functions", page 1-30.](#)

A conditional statement of the type described above would be written as follows:

```
«IF:Total m2>700»Phrase«ENDIF»  
«IF:Price-Thou<=120»Phrase«ENDIF»
```

Conditional Statement 2:

This type of conditional statement deals with different "true" or "false" statements. In this example a conditional clause is used to determine whether the address entered in an Organisation record is the company's Head Office or not, and whether VAT is included in the rent price or not. When answering these questions, PRIMO usually looks for answers in activated or deactivated check-boxes.

To create a conditional statement of this type proceed as follows:

```
«IF:Head Office»Phrase«ENDIF»  
«IF:No VAT»Phrase«ENDIF»  
«IF:Fees incl.»Phrase«ENDIF»
```

The condition in this case is the merge field.

Conditional Statement 3:

This type of conditional statement is used to tell PRIMO when it should or should not replace merge fields with data. It is the most commonly used conditional statement. The statement style used is similar to the one described in the Conditional Statement 2 example. For example, you could have a statement that said that if the Property record "Short info" field contains data then PRIMO should replace the «Short information» merge field, otherwise that space should be left blank.

```
«IF:Short information»Phrase«ENDIF»
```

The statement mentioned above would be written as follows:

```
«IF:Short information»Short information  
«ENDIF»
```

The carriage return is part of the "Phrase".

As in the previous case the merge field is the conditional clause.

Phrases

A phrase within a conditional statement can include typed text and very often, merge fields. The merge fields within a conditional statement can be simple, expanded or themselves embedded within a conditional clause. Furthermore, conditional clauses containing merge fields can be embedded within other conditional clauses ([see also the section entitled "Conditional Statements" in this chapter, page 13-12](#)). Merge fields in phrases, like anywhere else, must be enclosed in double pointed brackets.

Spaces and carriage returns added to a phrase are treated as text and remain a part of the statement when the layout is merged:

- Soft carriage returns, e.g. carriage returns automatically inserted by the word processor at the end of a line, usually on a space, may shift location as appropriate once merged.
- Hard carriage returns, created by using the Enter key (new paragraph) or the Shift+Enter key (within a paragraph) will appear exactly as they were entered in the phrase.

PRIMO does not automatically add spaces or carriage returns before or after a phrase or statement. Such formatting, if necessary, should be added to the layout.

The simplest way to format a statement is to format the entire statement. To do this, you must select the entire statement, including the brackets before the «IF:...» clause and after the «ENDIF» clause. Once the statement is selected apply the appropriate style (bold, underline, italics) or font (Arial, Times New Roman...).

Once you are comfortable formatting entire statements you may want to try your hand at formatting individual elements within a statement. You must, however, ensure that the formatting does not begin or end within merge fields or conditional clauses.

Example 1: Formatting the entire statement

Correct:

```
«IF:Short information»«Short information»
«ENDIF»
```

Incorrect:

```
«IF:Short information»«Short information»
«ENDIF»
```

Example 2: Formatting elements within the statement

Correct:

```
«IF:Short information»Short Information
«Short information»
«ENDIF»
```

Incorrect:

```
«IF : Short information»Short Information
«Short information»
«ENDIF»
```

Using Merge Fields in «IF:» Clauses

Example 1:

You may want to add the data from the Property record "Short info" field to a sub-layout that will be viewed in an Offer letter. However, if no "Short info" is available, then nothing should be entered in its place. Also, an empty line should not be left where the information should have been.

```
«IF:Short information»«Short information»
«ENDIF»
```

The carriage return is part of the “statement”.

Example 2:

If the "Short Information" is available then a "Position Number" (it is best to number items listed in a sub-layout since you may be offering more than one Property) should be inserted before the "Short information" followed by a space. The "Short Information" conditional statement should be followed by a carriage return.

```
«IF:Short information»«Position#» «Short information»
«ENDIF»
```

Note that the space between the merge fields «Position#» and «Short information» are actually part of the statement (it is regarded as text) and will appear as part of the document whenever the layout is merged. The carriage return before the «ENDIF» is also part of the statement.

Example 3:

A Property's total surface should only be inserted into a Property layout if the data has been entered in the Property record.

```
«IF:Total m2»Total Surface: approx. «total m2» m2«ENDIF»
```

All punctuation, spaces and text outside double pointed brackets are part and parcel of the statement.

Example 4:

If the "No VAT" check-box on the *Property:Data* page has been checked, then that information should appear in the Property layout. If you were to add such a line to a Property layout, it would read: "This property is not subject to VAT". If the Property is subject to VAT, then the above statement should be replaced with the VAT that applies (e.g "A VAT of 12% is due upon purchase of this property").

```
«IF:No VAT»This property is not subject to VAT. «ELSE»A VAT of 12% is due
upon purchase of this property. «ENDIF»
```

In this example, we did not insert a carriage return. In fact, there is no carriage return after the word “due”. Instead, what is known as a “soft line-break” was inserted automatically when the statement reached the end of the line, as is customary with word-processors. When you merge your layout, the word-processor will automatically readjust all line breaks based on your margins. However, if you wish to verify whether you have inadvertently entered a carriage return in a statement, click on the “paragraph marker” icon located on the right of the word-processor toolbar. Clicking on this icon will show any formatting you added to the statement.

Example 5:

In PRIMO, it is possible to enter minimum and maximum rents in the Property record. However, at the time of data entry both amounts are not always entered. Therefore, when creating a Property layout, you should plan for both contingencies. If only the minimum

rent amount was entered then only that amount should appear, if both amounts were entered then both should appear with the word "to" between them.

```
Rent/yr: «IF:Rent m2/yr max»£«Rent m2/yr min:L» per m2 to  
£«Rent m2/yr max:L» per m2«ELSE»£«Rent m2/yr min:L»/m2«ENDIF»
```

Offer Layouts

Specific standards apply to creating an Offer layout.

Offer layouts must be linked to the Offer section and must be of the type "Letters". Although the Offer layout is considered to be a "Letter", it must be able to contain Property information which regular letters linked to Organisation or Contact records are not able to do.

For reasons of simplicity and to avoid unexpected surprises when merging layouts, decide ahead of time on a consistent look and layout system for all PRIMO layouts. The following instances explain why consistency is important:

- The "Offer Text" Property sub-layout usually contains a short description of the property being offered. This sub-layout is inserted directly into the Offer layout and when the layout is merged, the Offer Text sub-layout will list the property description of each Property being offered, one after the other. If at the time of creating the "Offer Text" Property document for each property, you did not format the text in the same way, your list will not be formatted consistently once the Offer layout is merged.
- Currently in PRIMO, you can print two Fact Sheets with every Offer. However, if you wish to send an advert to a newspaper agency for publishing, the best way to do this is to write an "Offer" to the newspaper and include in the Offer letter the property (ies) you wish to advertise. To do this, you need to create a "Newspaper Advert" Property document for each property and through the use of a sub-layout insert the Newspaper Advert into the Offer layout. You can thereby send a one page document to the newspaper agency with the exact information you would like them to print. It is important, here again, that you maintain a consistent format in the layout, sub-layout and Property document.

The point mentioned above resolves any conflict that could arise from not being able to print more Property documents than you would like. The answer is a "sub-layout", that is, inserting one layout into another layout.

Sub-layouts are linked to the Property section of PRIMO and the corresponding property merge fields are available to you when creating a sub-layout.

Sub-layouts have another advantage: the layouts, in which they are inserted do not need to be updated whenever a sub-layout has been revised (and vice-versa). PRIMO always uses the most current form of a layout and sub-layout when merging.

The sub-layout inserted into an Offer layout will reproduce itself for each Property being offered. You will therefore obtain a list if more than one Property is being offered.

Sub-Layouts

The typical example of a sub-layout within a layout is the so-called "offer text", that is, a summary of each Property being offered. Through the application of sub-layouts, you can standardise the formatting and preparation of Offers, thereby creating them more rapidly. Finally, as mentioned above, you need not worry about re-formatting an Offer layout if you have made changes to the sub-layout.

To create a sub-layout proceed as follows:

✓ **Prerequisite:**

You have opened a blank layout by selecting "New Layout" from the PRIMO File menu.

1. Give the layout a name such as "Offer Text".

You may find it useful to attach the department name to the layout name (e.g. Offer Text-Office Sales vs. Offer Text-Industrial Rent), to make it easier to choose between sub-layouts.

➔ **Tip:**

We highly recommend that a strict naming convention is applied when labelling layouts and sub-layouts. This is particularly important with sub-layouts since the sub-layout name is inserted into the layout manually. Any typing errors would cause the sub-layout to not be merged with the rest of the Offer. Finally, PRIMO is case-sensitive and any word typed incorrectly, will not be recognised and will cause the sub-layout not to be merged.

2. Link the sub-layout to the Property section of PRIMO. Select "Offer-Text" from the "Type" drop down list (selecting a layout type in this case is not necessary, but it makes it easier to categorise your layouts and sub-layouts).
3. With the help of merge fields, enter the Property information that you would like to see appear when the Offer layout is merged.
4. Format your document.

➔ **Tip:**

All formatting, including font, font size and style (e.g. Arial 12pt Bold), spaces and carriage returns must be done in the sub-layout.

A sub-layout produced in this way can only be added to Offer layouts. However, the same sub-layout can be added to more than one Offer layout.

Offer Text Examples

Example 1:

```
«IF:Short information»«Short information»
«ENDIF»«Street», «Town» «Postcode»
Sale Price: £«Price:K»«IF:Fees incl.»
All fees included in sale price.«ENDIF»
```

The carriage returns before the «ENDIF» and the words "Sale Price" and "All fees" are included in the Phrase.

Once merged the above sub-layout should look as follows:

```
East Gate Shopping Centre
175 Camelia Place, London E2X 3W1
Sale Price: £6,900,000
All fees included in sale price.
```

Example 2:

```
«IF:Short information»«Short information»
«ENDIF»«Street», «Town» «Postcode»

Rent/yr: «IF:Rent m2/yr max»£«Rent m2/yr min:L» per m2 to
£«Rent m2/yr max:L» per m2«ELSE»£«Rent m2/yr min:L» per
m2«ENDIF»

Available surface: «Free Space:K» m2, minimum available
«m2min:K» m2
```

Once merged the above sub-layout should look as follows:

```
East Gate Shopping Centre
175 Camelia Place, London E2X 3W1
Rent/yr: £18.00 per m2 to £20.00 per m2
Available surface: 900 m2, minimum available 600 m2
```

Creating Sub-Layouts using Property Documents

The documents on the *Property:Document page* (e.g. Fact Sheet 1 and 2, Offer-text, Newspaper Advert, Window Display, Update Explanation, Renter Information) can be used as sub-layouts, since they too are linked to the Property section of PRIMO. To use these documents as sub-layouts, you must insert an "@" sign in front of them.

Turning Property documents into sub-layouts is done differently from the way you would usually create a sub-layout. Like other sub-layouts, these sub-layouts can only be inserted into Offer layouts. To create a sub-layout using a Property document proceed as follows:

1. Open a blank layout by selecting "New Layout" from the PRIMO File menu.
2. Give the sub-layout an appropriate name.
Avoid giving sub-layouts and layouts the same name-type (e.g. if you use PL_Layoutname for a Property layout, save your sub-layouts as SPL_Layoutname).
3. Link the new layout to the Property section of PRIMO.
4. Select "Offer Text" from the "Type" drop down list.
5. From the "Insert Merge Field" dialogue box, go to the bottom half of the merge field list and select the Property document you wish to insert into the sub-layout.
6. Add additional Property documents into the sub-layout as needed.

7. Add merge fields from the list of available merge fields, if necessary.
8. Format the sub-layout (using carriage returns and spacing).
 Fonts, font size and style should be applied to each Property document separately.
 In its simplest form, this sub-layout will contain nothing but a merge field: «@Property Document Name», followed by a carriage return:

```
«@Property Document Name»
```
9. Save the sub-layout.

Examples of Sub-layouts using Property documents

Example 1:

The following example shows how to insert an "Offer Text" Property document into an Offer layout. The offer-text must already exist and should apply to all Property records. For further information on this subject see [section entitled "Property: Documents page", Chapter 3, "Properties", page 3-26](#):

```
«@Offer-text»
```

(The sub-layout includes a carriage return after the merge field.)

Once merged the layout could look as follows:

```
This ideally located single-family house was built in 1922 and
was completely renovated two years ago. The house has over
eight rooms, including a spacious living room, two bathrooms
and two balconies.
```

Example 2:

The following example shows the use of an "Offer Text" Property document in a sub-layout. It can be used, for example, to describe a property if the property's address should not be mentioned.

```
«IF:Short information»«Short information»
«ENDIF»«@Offer-text»
Price: £«Price-Mill:L» Million
```

Once merged the above layout could look as follows:

```
Country Residence
This ideally located single-family house was built in 1922 and
was completely renovated two years ago. The house has over
eight rooms, including a spacious living room, two bathrooms
and two balconies.
Price: £1.21 Million
```

Inserting Sub-Layouts into Offer Layouts

1. Open a blank layout by selecting "New Layout" from the PRIMO File menu.
2. Give your new layout a name.

3. Link the layout to the Offer section of PRIMO and select "Letters" from the "Type" drop down list.
4. Write the Offer letter.
5. Click on the "merge field" button ("«...»") located next to the word-processor "File" menu.

The merge field dialogue box will open with a selection of merge fields for you to choose from. Merge fields from the Contact section of PRIMO are also available at this time.

6. Select the merge field «@Layoutname».
If you prefer, you may type the name of the merge field directly into the layout. If you prefer to enter merge fields manually into a layout, you should refer to the [section entitled "Merge Fields" in this chapter, page 13-6](#) for instructions on how to do this properly.
7. If you selected «@layoutname» from the merge field dialogue box, replace the word "layoutname" with the name of the sub-layout (e.g. "Office Summary").

The merge field should now look like this:

«@Office Summary»



Important:

The layout name that replaces the merge field "@layoutname", must be preceded by the "@" sign and both the layout name and the "@" sign must be between double pointed brackets («...»).

Text Macros

Text macros enable, you, the user, to use letters or characters in the place of recurring text. Inserting text macros into documents can be useful whenever you have to frequently type the same sentences, phrases or whole paragraphs. Text that is used repeatedly can be saved as a text macro. That way, whenever you type the name of a specific text macro in a document, the text that you saved in that MACRO layout will be inserted into the document.

Text macros are layouts that are assigned to the layout type "MACRO". In order to ensure that macros can be used with all layouts, you should not assign a macro to a specific section of PRIMO. This also ensures macros do not contain merge fields from a particular section of PRIMO.

There are no further restrictions in the creation of macros.

Creating Text Macros

Text macros are created in the same way you would create a layout:



Prerequisite:

You have selected "New Layout" from the PRIMO File menu.

1. Give the macro a short and appropriate name.
This is the name you will use when inserting the macro into a document, therefore, we suggest that the name you choose be short and without hyphens or spaces.
 2. Select "MACRO" from the "Type" drop down list.
 3. Select the font and font size from the drop down lists on the ruler, as needed.
 4. Type the text you wish to see saved as a macro.
All the word-processor's formatting capabilities can be used to format the macro (cf. [Chapter 9, "Word-Processor"](#)).
 5. Select merge fields from the "«...»" dialogue box, as needed.
To review how to insert merge fields see the [section entitled "Merge Fields" in this chapter, page 13-6](#).
 6. Save the new macro.
- ➔ **Tip:**
The macro is usable as soon as you have saved it. You need not close the word-processor nor the layout in order to apply the macro. In fact, it is usually a good idea when you have just created a layout to save it, leave it open and try to create a document using the layout. That way, once you have merged the layout you can go back to the open layout and make any necessary modifications. Note that as long as you do not save changes you have brought to a layout, PRIMO will use the previously saved version when merging.

Using Text Macros

To use text macros proceed as follows:

- ✓ **Prerequisite:**
You have created and saved at least one MACRO layout using the steps described above. You have also opened a document, such as a letter.
1. Enter the name of the macro into the document where you would like the text macro to appear and make sure the cursor is positioned right after the macro name.
 2. Type "Ctrl+T" or select "Text Macro" from the PRIMO Edit menu.
The macro name is replaced with any text and merge fields entered in the MACRO layout.

Example:

A macro entitled "confcall" would look as follows:

This letter is to follow-up on the meeting between # and «.S.User:KNAME» that was held at our London office on «.D.Date».

Once merged the macro should look as follows:

This letter is to follow-up on the meeting between # and Mr. John Smith that was held at our London office on 12th December 1996.

The “hash” or “#” sign must be replaced by the Contact’s name once the macro is merged. You cannot insert a «[Contact].Name» merge field into the MACRO layout as MACRO layouts are not linked to any section of PRIMO.

Offer-Layout Examples

The following examples show:

- how to prepare a Property sub-layout to be inserted in an Offer layout, using Property documents listed on the *Property:Documents page* (e.g. Offer Text and Newspaper Advert), as well as merge fields from the Property section of PRIMO.
- how an Offer layout can include a sub-layout linked to the Property section of PRIMO. This allows you to list the Properties you would like to offer in the Offer letter you will be sending out to clients.
- how offer texts and macros inserted into an Offer layout as sub-layouts look once the Offer layout is merged.
- an example of an Offer letter that includes a sub-layout containing a "Newspaper Advert".

Both of the following Offer letter examples, include an offer text sub-layout.

How do I proceed?

A **Layout**, once merged, can only represent one type of document (e.g. Offer vs. Fact Sheet). An Offer text sub-layout, on the other hand, can be applied to several Offer layouts.

Property Documents should be created at the same as the property information is being entered into the Property record. At the very latest, the documents should be created before they are needed as attachments to an offer.

The **Offer Letter** and the **Newspaper Advert** are merged automatically by PRIMO when you create an Offer and select the appropriate layout. Once the layout is merged, you may make final changes to the document before you print it.

Usually, the Program Administrator will have turned on the default **History-Activity** option. This option creates a History-Activity for every Offer you print.

Creating an Offer without Giving Away the Property’s Location

An Offer should not give away the Property’s location. It should instead awaken the client’s interest enough so that he/she contacts you about the Property.

For more information on this subject see [Chapter 10, “Offers”](#).

To create an Offer, proceed as follows:

1. Decide which Property information you would like to see appear in the Offer:
 - the Short Info,

- the Offer Text or Property Description,
 - the Purchase Price,
 - the Reference (e.g. Property number or Agent initials).
2. Create a new sub-layout and link it to the Property section of PRIMO. Add the necessary merge fields to the layout:

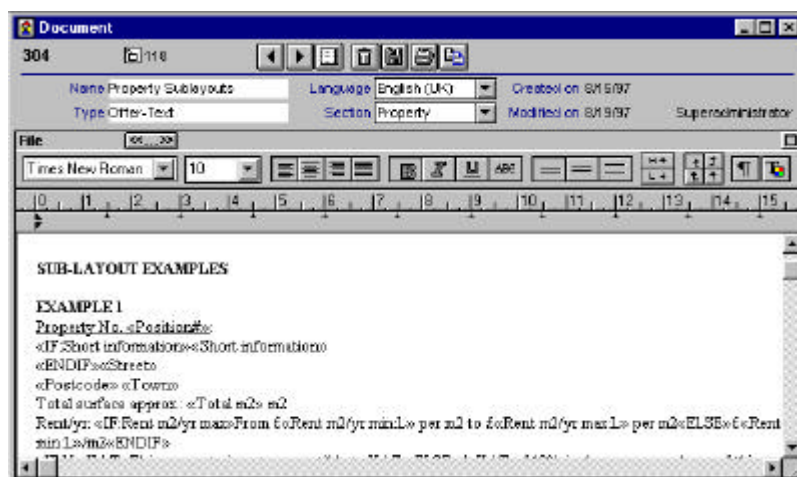


Fig. 13-4: Example: Property Sub-Layout Used to Show Property Data in an Offer Layout

The merge fields in the sub-layout contain data from each Property being offered. The merge field "@Offer Text", once merged, will be replaced with the "Offer Text" Property document that you have created. You must add this Property document to all the Property records that you wish to list in the Property sub-layout and ultimately, the Offer layout.

The Property sub-layout in this example is entitled "Standard Offer Text" and it is linked to the Property section of PRIMO.

3. Create the corresponding Offer Layout (Section "Offer", Type "Letters", Layout Name "Standard Offer Letter"):

If a similar layout already exists, you may duplicate it and simply re-format and rename the copied version.

Place the cursor where you would like to insert the Offer Text sub-layout into the Offer layout and select the «@Layoutname» merge field. Now replace the word "Layoutname" with "Standard Offer Text". The merge field should read «@Standard Offer Text». PRIMO requires the sub-layout name so that when the Offer layout is merged, data from the Property records you are offering is correctly entered into the Offer.

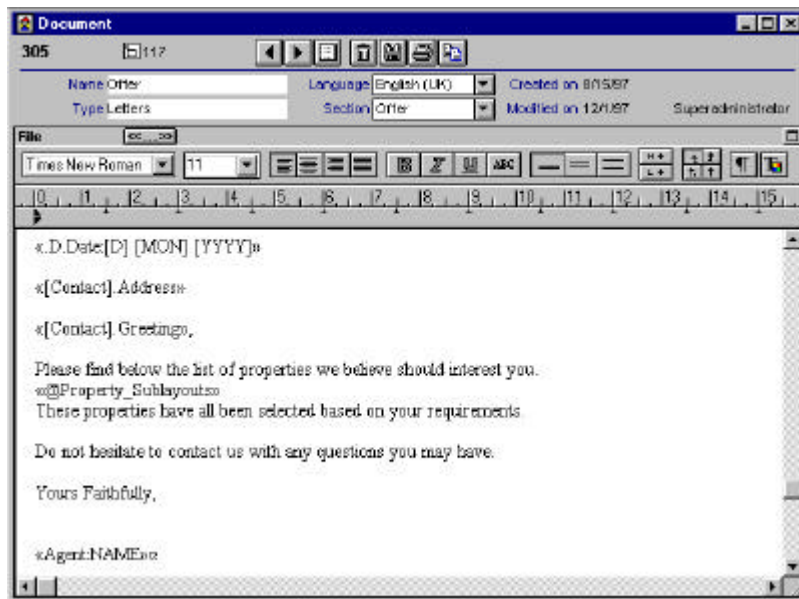


Fig. 13-5: Example: Offer Layout with a Sub-Layout

➔ **Tip:**

The merged sub-layout will show data brought in from the Property record being offered. If more than one Property record is being offered then the sub-layout repeats itself for each Property being offered.

4. Create an “Offer Text” Property document. Here is an example of an “Offer Text”:

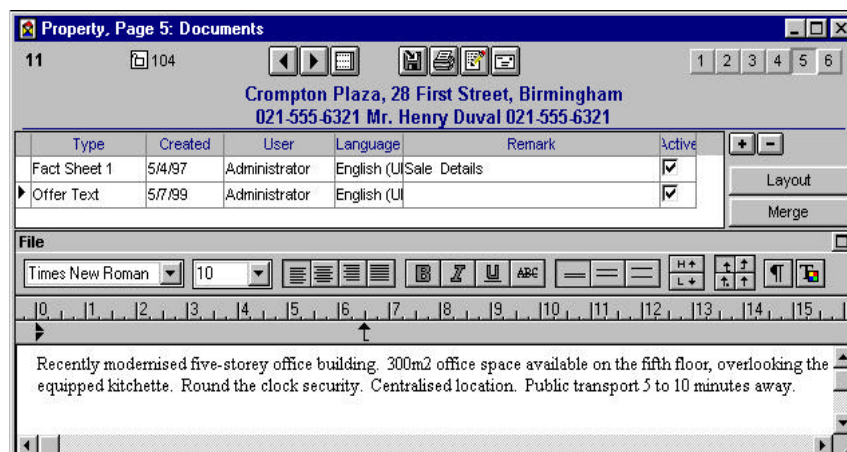


Fig. 13-6: Example: “Offer Text” Property Document

5. Create an Offer.

The four points described above all come together to produce a finished Offer (the entire Offer is not visible in the following image):



Fig. 13-7: Example: Offer Letter (Partial View)

Creating Newspaper Adverts in PRIMO

The "Newspaper Advert" Property document option in PRIMO is very practical in that it allows you to keep a record of all the adverts that you have created for this property on the Property record's *Documents page* and re-use them as necessary.

The process of placing a advert in the paper is handled by PRIMO by writing an offer to the newspaper agency and inserting the appropriate "Newspaper Advert" Property document into the offer as "Offer Text". This method of sending an offer to a newspaper agency is not much different from the way you would write an offer letter to a regular customer. For more information on this subject, see the [section entitled "Using Offers Creatively", Chapter 10, "Offers", page 10-10](#).

1. Create an Organisation record for the newspaper agency if it does not already exist.
2. Create a Requirement for the newspaper agency and set the following options (if a Requirement already exists, you can re-use it):
 - *Address page*: Status "inactive" (the Requirement should not be used for matching purposes).
 - *Address page*: In the Remark field type "FOR NEWSPAPER ADVERT PURPOSES ONLY"
 - *Data page*: Do not enter any property requirements (e.g. surface, price).
3. Go to the *Documents page* of the properties you would like to "offer" to the newspaper agency and create one or more newspaper adverts for each one of them. An example follows:



Fig. 13-8: Example: "Newspaper Advert" Property Document

- In an "offer" letter to the newspaper agency you need to insert the text from the "Newspaper Advert" Property document. Therefore, you must create a Property sub-layout containing a link to that type of property document. An example follows:

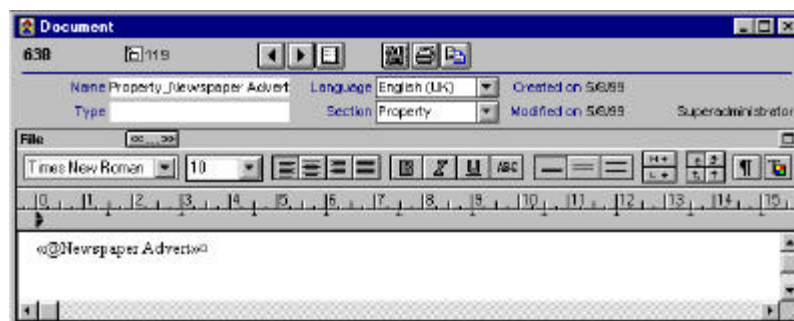


Fig. 13-9: Example: "Newspaper Advert" Sub-Layout

The words "Newspaper Advert" will allow PRIMO to locate the type of Property document needed in the sub-layout.

Note: If you have created more than one newspaper advert on the *Property:Documents page*, you must activate the one you wish to see merged into the offer letter.

- Create an Offer layout for the letter you wish to send to the newspaper agency. An example follows:

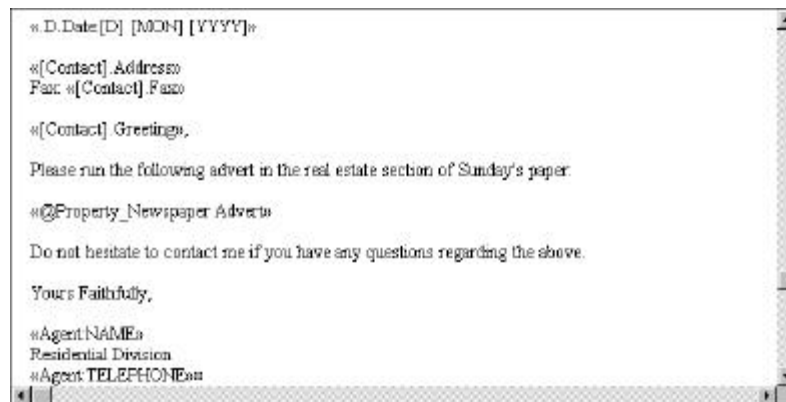


Fig. 13-10: Example: "Fax to Newspaper Agency" Offer Layout

Within the Offer layout that you are creating to send to newspaper agencies, you will insert the Property sub-layout (« @Property Sub-Layout name») which contains the link to the Property document Newspaper Advert (« @Newspaper Advert»).

You are now ready to send an "offer" letter to the newspaper agency with a list of properties you wish to advertise. Under normal circumstances, you will have entered property data into the *Requirement:Data page* and PRIMO will have listed all the properties that match the requirement. PRIMO will only allow you to write an offer if you have properties listed in the match list. Since there are no requirements in this case and therefore matching is not possible, properties have to be "forced" into the match list so that you may write the offer. To do this, proceed as follows:

6. Open the newspaper agency's Requirement record and go to the *Requirement:Data page*. Pull into the match list the properties you wish to "offer" by using the "+NR" or "+" options.
7. Click on the "Offer" icon (envelope).
8. From the Layout drop down menu on the *Offer page*, select the Newspaper Advert Offer layout that you have created for this purpose.

The layout will be inserted into the *Offer page* and will merge automatically.

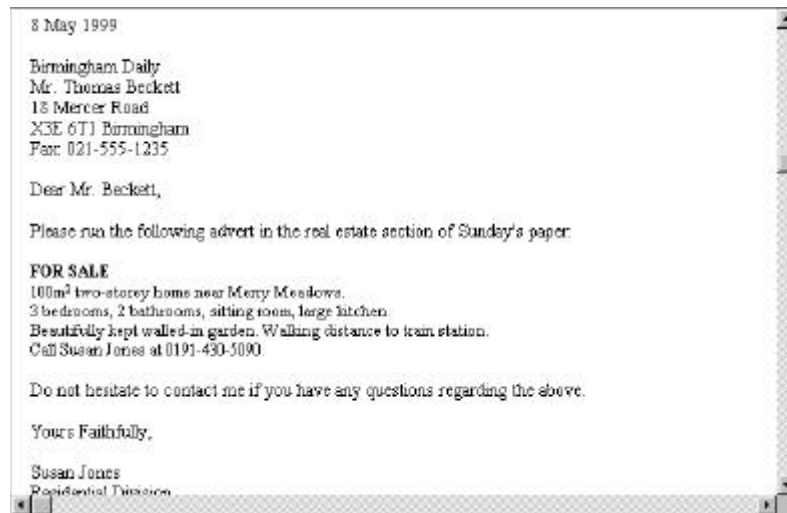


Fig. 13-11: Example: Newspaper Advert “Offer” Letter

9. Check the options “Letter” and “History” and print the letter by clicking on the “printer” icon.

The “History Activity Options” dialogue box will open:

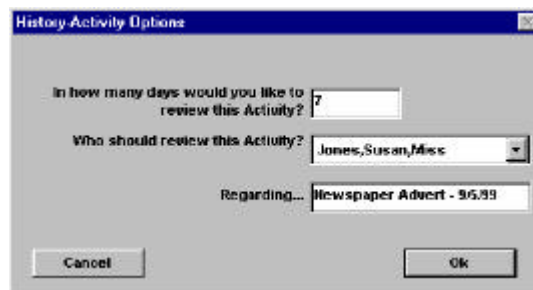
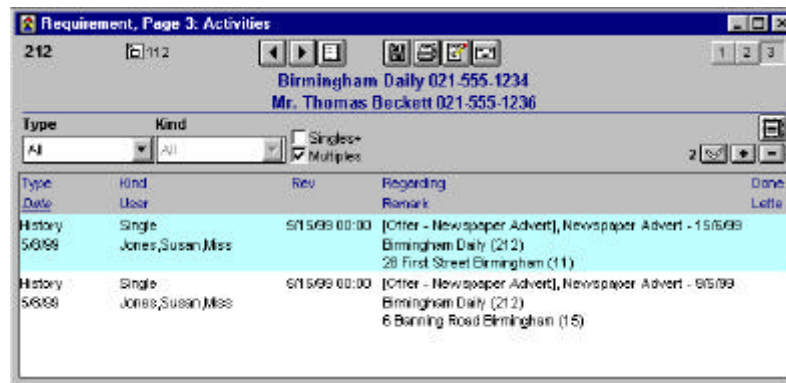


Fig. 13-12: Example: Newspaper Advert History Activity Options

10. Modify the fields as necessary. You may want to add the date the advert will run in the newspaper.

The *Requirement:Activity page* will list all the newspaper adverts you have placed with this newspaper agency.



The screenshot shows a software window titled "Requirement, Page 3: Activities". At the top, it displays the number "212" and a search icon. Below this, it lists "Birmingham Daily 021-555-1234" and "Mr. Thomas Beckett 021-555-1236". There are filters for "Type" (set to "All") and "Kind" (set to "All"), along with checkboxes for "Single-" and "Multiples". A table below shows the letter history with columns for "Type", "Date", "Kind", "User", "Rev", "Regarding", and "Done/Lette".

Type	Date	Kind	User	Rev	Regarding	Done/Lette
History	5/8/99	Single	Jones,Susan,Miss	5/15/99 00:00	[Offer - Newspaper Advert], Newspaper Advert - 15/5/99 Birmingham Daily (212) 28 First Street Birmingham (11)	
History	5/8/99	Single	Jones,Susan,Miss	5/15/99 00:00	[Offer - Newspaper Advert], Newspaper Advert - 9/5/99 Birmingham Daily (212) 6 Banning Road Birmingham (15)	

Fig. 13-13: Example: Newspaper Advert "Offer" Letter History

Trouble Shooting

It can happen, especially when you first start working with layouts, that a layout does not merge properly. As with anything, practice makes perfect. It's important to remember that your experience with layouts will grow with every one you create. Finally, creating a good and sound layout will eventually save you a lot of time and routine work.

The following are some tips on how to identify and remove common errors. Errors can be identified and corrected fairly quickly if you go through them systematically.

General Trouble-shooting

Ask someone to look over the layout for you: after all, you have been looking at it so long, you probably have overlooked a simple error.

Why not print the layout? It is often easier to review a document once it is printed.

→ **Tip:**

Leave the layout you are testing open so that you can go back to it easily. To tab between the record you are testing the layout from and the actual layout, select either one of them from the PRIMO Window menu.

Error Occurs when Layout is Merged

If PRIMO does not recognise merge fields inserted in a layout it will not merge them correctly. In the case of "regular" merge fields, you will know if they have not been merged when they remain intact and the double pointed brackets surrounding them are replaced by question marks ("?"). In the case of sub-layout merge fields, you will know if they have not been merged when they remain intact and the double pointed brackets surrounding them are replaced by square brackets ("[")], followed by question marks. Possible reasons for such errors are as follows:

- The merge field you have used is not available for the section of PRIMO you have linked to your layout.
- The sub-layout name you have entered is either incorrectly spelled, has been renamed, or no longer exists.

If you are using a Property document as a sub-layout (e.g. an "Offer Text" Property document) to be inserted into an Offer layout, you must make sure that you have added that particular Property document to the Property you wish to see listed in the merged Offer layout. If you do not add the Property document to the Property, when the Offer layout is merged, where the Property document should have appeared, you will get the following message "No text for (Property Document) available", followed by the Property record number. If you get this message, discard the Offer you were creating, add the Property document to the Property record and create a new Offer.

Merge Field Brackets and Statement Clauses

Your merge fields may not be merging because you may have a shortage of double pointed brackets, and your statements may not be merging because you may not have the correct clause structure (e.g. IF, THEN, ENDIF).

→ Tip:

The best way to verify the above is to print out the layout and armed with a pencil and a little patience, check off any errors you may find.

- For every pointed double bracket («) at the beginning of a merge field or a statement, there must be a corresponding pointed double bracket (») to close the merge field or statement.

**Important:**

Make sure you locate the double bracket key on your keyboard. Using two single brackets will not work.

- For every «IF:...» that opens a conditional statement, there must be a corresponding «ENDIF» to close the statement.
- A colon must be placed directly after every «IF:...».
- Every «ELSE» must be preceded by an «IF:...» and followed by an «ENDIF»

Divide and Conquer...

- When a complex layout is not merging correctly, especially when dealing with several «IF:» statements, the best strategy is to copy each «IF:» statement into separate documents. In this way, you can test each statement individually to verify that it merges correctly.
- To further troubleshoot merging problems in layouts, test each individual merge field/complex phrase outside of any «IF:» statement.
- If real data is not available, create dummy data to test layouts.

Rules for Naming Layouts

The names of layouts should “speak out” to you, so at a glance you can tell what even rarely opened layouts are used for.

The naming of layouts should be based on the following rules:

- You may use both small caps and capital letters. Capital letters may be used in the middle of the name.
- You may use digits, but we suggest that you start a layout name with a letter.
- You may use the following signs: _ (Underscore), - (Hyphen, Minus sign), #, \$, &.
- You may **not** use the following: brackets of any type, quotation marks, apostrophes, accents, punctuation marks and any sign not listed above.
- The “at” sign (“@”) is used to insert a sub-layout into a layout and can therefore serve no other purpose.
- You should not give a layout the same name given to a Property document (cf. any *Property:Documents* page for a list of Property document names).

→ Tip:

If you wish to give a layout a name containing several words, instead of using spaces between each word, link the name by using underscores (Offer_Basic) or

hyphens (Offer-Basic). You could even type the name as one word using capital letters as a separator (OfferBasic).

Frequent Problems: Causes and Solutions

- Problem** Address field is empty.
- Cause** Address box in Contact record has not been filled.
- Solution** Search for and open the affected Contact record.
Click on the "Address" and "Greeting" buttons.
Select the address and greeting format you require and modify them if necessary.
Save the record.
- Problem** A complex merge field does not merge as expected.
- Cause** The statement is incorrect.
- Solution** Check the layout in detail. Any suffix or prefix added to a merge field must be in CAPITAL LETTERS. Make sure all punctuation ("«";"»" and colons) is correct and that all «IF:...», «ELSE» and «ENDIF» clauses are matched as explained above. Also, do not omit the "@" in front of all sub-layout names.
- Problem** Conditional clause is not executed.
- Cause** The clause is incorrect.
- Solution** Check the construction of the conditional clause.
Are the «IF:...», «ELSE» and «ENDIF» clauses in the right place and in the right order?
Have you removed the double pointed brackets around the merge field you have inserted inside the «IF:» clause? One set of double pointed brackets is enough.
Any formatting or extra text (e.g. commas, m2, \$, etc.) that you wish to add, must be inserted before or after the double pointed brackets.
- Problem** When writing a letter or offer letter, some of the layouts in the Layout drop down list are greyed out and cannot be selected.
- Cause** You have used "forbidden" characters when naming your layout. This is usually the case when you use a parenthesis at the beginning of the Layout name.
- Solution** Open the layout and rename it using the rules mentioned above. (Be sure to save after you have made the necessary changes, or you will not see the changes when you reselect the layout.)
- Problem** A layout is not listed in the Layout drop down list you expected.

-
- Cause** The layout was assigned to the wrong section of PRIMO or assigned the wrong document type.
- Solution** Open the layout and check to make sure it is properly assigned. Compare the selections you have made with those described in the [section entitled “Layout Sections” in this chapter, page 13-2](#) and in the [section entitled “Layout Types” in this chapter, page 13-3](#).
- Problem** The name of the sub-layout remains between double pointed brackets once merged and is followed by a series of question marks.
- Cause** The sub-layout name is misspelled.
- Solution** Check the spelling of the sub-layout’s name. Open the layout and correct the sub-layout name. Make sure that when you inserted the merge field «@Layoutname», you only replaced the word «Layoutname» with the name of the sub-layout. The “@” sign must remain in place. The sub-layout name must be preceded by double pointed brackets and the “@” sign, and it must be followed by double pointed brackets.
- Problem** Instead of the Property document, the following message appears in the offer letter, "no document exists for this property" followed by the property number.
- Cause** The Property document inserted in the Offer letter was not added to the Property record of the Property being offered.
- Solution** Discard the Offer and go to the *Documents page* of Property record in question. Create the Property document you wish to insert in the Offer letter. Save the Property record and create a new Offer.