

OL[®] Connect

Walkthrough

Creating a personalized letter

Version 2022.2

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Creating a personalized letter
Version 2022.2
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Upland Software, Inc

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Introduction

This tutorial introduces you to some of the basic functionality of Connect Designer. You will learn how to set up a personalized business letter by creating a new print document, add content from MS Word, import image resources, load a CSV data file and set up variable content elements.

Connect Designer lets you create and design print documents and emails in one place, and also web pages if you have PlanetPress or PReS Connect. Every aspect of your document can be easily personalized thanks to its feature-rich and user-friendly interface.

The file format of the documents utilizes HTML, the main markup language for displaying web pages and e-mail messages. Connect Designer extends this with paginated documents intended for print. When exploring the user interface you will see several items that reveal this underlying technology. Knowing HTML is not a requirement to work with the application: the user interface includes the appropriate features for both novice and advanced users.

This tutorial introduces you to some of the basic functionality of Connect Designer. You will learn how to set up a personalized business letter by creating a new print document. You will add content from MS Word, import image resources, load a CSV data file and set up variable content elements.

After having completed this walkthrough, you'll have a basic knowledge of how to use Connect Designer, but there are more ways to do things and more things you can do. So, go on and explore! To discover new ways and enhance your skills, please visit <https://olresourcecenter.uplandsoftware.com> and the Help ([PReS Connect](#) or [PlanetPress Connect](#)).

Note: The resources needed for this walkthrough can be downloaded: [Designer-Letter-resources_2022.zip](#)



March 30, 2023

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Take advantage of our Bundle Offers

Dear Francoise,

Do you want to combine quality with the benefits OL Mobile can give you? With OL Mobile you can surf the internet, call and even watch Internet TV. OL Mobile now offers you a 3-in-1 bundle.



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Want to know what's in it for you? The bundle package includes 500 free minutes, 500 sms and 500 MB bandwidth for surfing the internet for only an additional \$5, automatically added to your invoice, monthly.

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Are you interested in our all-in-1 package? Call us free of charge at 1800-112-2333, or visit us at olmobile.com/bundleoffer. Here you can find all details and register and subscribe to the exclusive OL Mobile Bundle Offer.

If you have friends living close by who could be interested too, let them know! The OL Mobile Bundle Offer for anyone living in Montréal will be valid throughout 30 June 2017.

Looking forward to welcoming you as one of our preferred customers soon.

Best regards,

Pierre Probst
Senior Sales Representative

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Creating a letter

This lesson introduces the concepts of sections, content and formatting. You will also learn how to navigate the content.

1. Creating a print template

Start by creating a new document for print.

1. Launch the Designer by double-clicking the application icon.
2. In the **Welcome** screen, click **Create a New Template** and choose **Word-based Print**. Or choose **File > New > Template > Word-based Print Template** and click **Next**. The **New Word-based Print Template** dialog is shown to select .

The dialog lets you enter parameters for the new document, which includes its page size, the page margins and the number of sections. A section contains one or more pages. Text will flow automatically from one page to the next.

3. Click **Browse** icon next the **path:** field to select a Word document. The file explorer opens. Select the sample file **letter-text.docx** from your local drive.

Note: The Word document **letter-text.docx** is included in the resources that you have already saved to your local drive.

4. Click **Next**. The initial page size, margins, and orientation are taken from the original document settings and displayed in the dialog window that appears. You can adjust them on that dialog window.
5. Make the following settings:
 - **Margin Top:** 1.5in
 - **Margin Right, Bottom and Left:** 0.75in

The values may be converted into another measurement unit, depending on your settings (Window > Preferences > Print > Measurements).

Note: After the template is created, you can change the size of images and text boxes, and adjust the page size and margins.

6. Click **Finish**.

The new document is shown in the workspace. A Print context is created with the specified number of sections in it. For each page in the document, one page is created in the Print section. A separate word.css file is created in the Stylesheets. The css file is linked to the active section.
7. To save the template, click **File > Save As**. The **Save Template** dialog box displays.

8. Navigate to a folder (preferably, the folder where you unzipped the sample files), enter **My OL Mobile letter.OL-template** in the **File name** field and then click **Save**.

2. Formatting text

Connect Designer has many text editing and formatting capabilities. Applying formatting to selected text is referred to as **local** or **inline formatting**. Formatting could also be handled via style sheets, as will be demonstrated later.

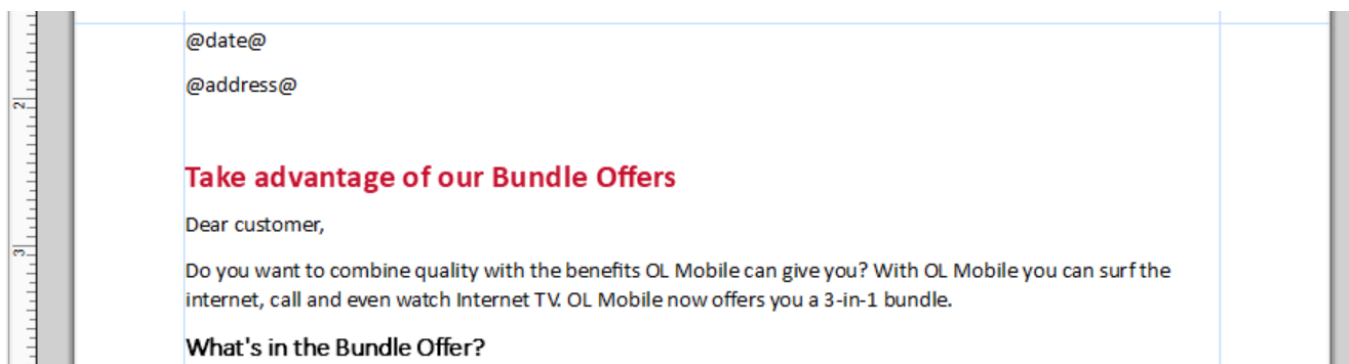
1. Select the text of the subject line: "Take advantage of our Bundle Offers".
2. Common text properties (e.g. font, size, color) can be set via the options in the **Formatting** toolbar.
Click the **B** icon on the toolbar to bold the text.

3. Another option is to format selected text using the **Text formatting** dialog. To open it, click **Format > Text....**

The dialog can also be invoked by pressing Ctrl + T or via the shortcut menu: right-click the selected text and choose **Text...**

4. Change the font size to: 16pt.
5. Click the **Edit Color** icon (the small square next to the color field). The **Color Picker** dialog appears. Colors can be specified in CMYK, RGB and HEX color values.
6. Choose the following color values:
 - Cyan: 0, Magenta: 92, Yellow: 77, Black: 22
 - Color mode: CMYK (this will store the specified color using the CMYK values)
7. Click OK twice, to close the dialogs.

Note: The style changes are applied to the selected text. When you press **Enter** somewhere in this text, a new paragraph is created that inherits these text styles.



4. Exploring the document

This exercise shows how to explore the document and select elements on the page.

1. Take a look at the **Outline** pane. The **Outline** pane can be reached in the upper left area next to the main editor. In case the **Outline** pane isn't available, choose **Window > Show View > Outline**.

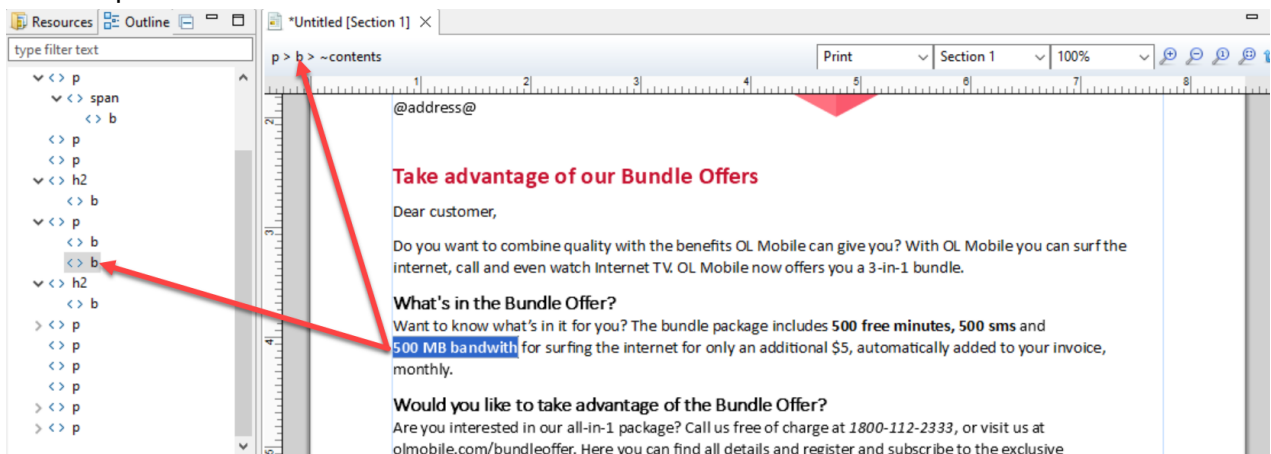
The Outline pane shows a hierarchical tree structure of the pages and their elements and is useful to quickly select elements. It represents the HTML Document Object Model or **DOM** - a term advanced HTML users will recognize.

In this example the Outline pane shows a series of paragraphs and two subheadings. The paragraphs are presented by the `<> p` entries in the tree and the subheadings are marked with `<> h2`. Other common HTML elements are: h1 through h6 (headings), img (image), table, tr (table rows), td (table data or table cells), b (bold), span (a piece of styled text).

2. Click a paragraph element in the outline. The main document window highlights that paragraph and shows a thin line around its contents. The paragraph is now selected.

Note that the same information is shown below the title of the document. This line is referred to as the **breadcrumbs**.

3. Use the arrow up and arrow down buttons to navigate through the elements in the outline.
4. Place the cursor in the text "500 MB bandwidth". Now the breadcrumbs read **p > b**. This signifies that the bold text is a child element of the paragraph.
5. Click the **b** in the breadcrumbs to select the bold text.
6. Click the **p** in the breadcrumbs to select the paragraph. Note that the element gets selected in the **Outline** pane too.



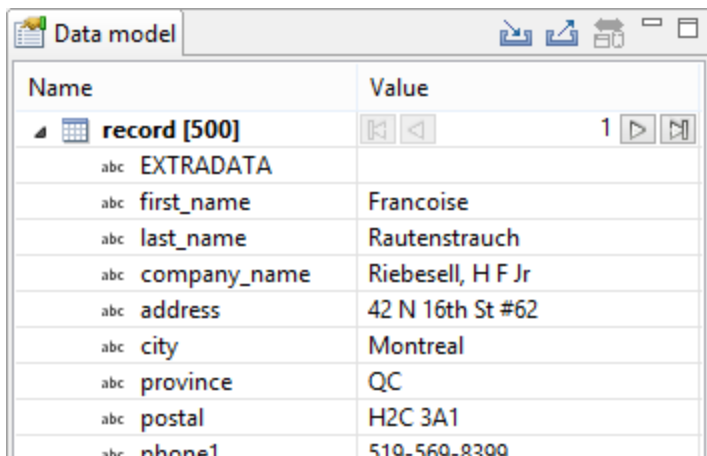
Adding personalization

To create a personalized document, you need information about the recipients: the first name, last name, email address, job title, etc. The exercises in this chapter show how to import a sample CSV data file and they demonstrate various techniques to add data fields to the page and to create dynamic content.

1. Loading a data file

A Comma Separated Values file (.csv) is a simple text format in which data are separated by commas or semicolons. When you load a CSV file, a wizard guides you through the process of importing the data and lets you set several import options.

1. Choose **File > Add Data > From File Data Source....** The **Open Data Sample File** dialog appears.
2. Select the sample **letter-data.csv** file and click **Open**. The wizard for loading CSV files is now shown.
3. Click **Next** to navigate to the second page of the wizard. Make the following settings:
 - **Separator:** Semicolon
 - Check the **First row contains field names** option.
4. Click **Finish**. The extracted data is shown in the **Data Model** pane at the right. If this pane isn't visible, choose **Window > Show View > Data Model**.



The screenshot shows a window titled "Data model" with a table of data. The table has two columns: "Name" and "Value". The first row is a header row. Below it, there are several rows of data. The first row of data is "abc EXTRADATA". The second row is "abc first_name Francoise". The third row is "abc last_name Rautenstrauch". The fourth row is "abc company_name Riebesell, H F Jr". The fifth row is "abc address 42 N 16th St #62". The sixth row is "abc city Montreal". The seventh row is "abc province QC". The eighth row is "abc postal H2C 3A1". The ninth row is "abc phone1 514-560-8300".

Name	Value
abc EXTRADATA	
abc first_name	Francoise
abc last_name	Rautenstrauch
abc company_name	Riebesell, H F Jr
abc address	42 N 16th St #62
abc city	Montreal
abc province	QC
abc postal	H2C 3A1
abc phone1	514-560-8300

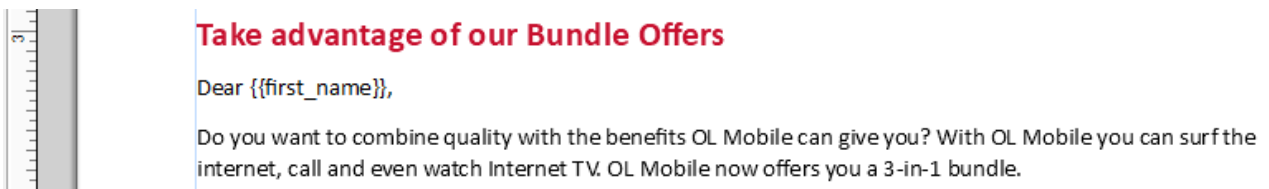
5. Use the browse buttons in the Value column to browse through the imported data.

Note: PlanetPress and PReS Connect have more advanced options for importing data via the DataMapper. This module allows to extract, manipulate and use data from a wide range of data sources, including line printer data and PDF documents. It is not available in PrintShopMail Connect.

2. Adding a data field to the document

As soon as data have been imported, you are ready to start personalizing the document by adding data fields to the template. When you add a data field to the template, an *expression* is inserted at the cursor position. Expressions look like this: `{{fieldname}}`. When the document is viewed in **Preview** mode (or when output is generated), the expression gets replaced with the value of the data field.

1. Remove the text “customer” in the salutation of the letter.
2. Select the **first_name** field in the **Data Model** view and drag the field after the text “Dear” in the document. On releasing the mouse button, the expression `{{first_name}}` is inserted at the cursor position.



3. Switch the view mode of the document from **Design** to **Preview** by clicking the **Preview** tab at the bottom of the workspace. This shows the merge result. Use the browse controls in the **Data Model** pane to scan through the records.

The expression `{{first_name}}` gets replaced with the value of the `first_name` data field in the current record. This is done by the **Handlebars** library which is integrated in **OL Connect**. For more information see the online help: [Handlebars in OL Connect](#).

In previous versions, variable data used to be inserted in a template via *scripts* and *placeholders* (see the online help: [Variable data in text: scripts and placeholders](#)).

The advantage of expressions is that fewer scripts and sometimes no scripts at all are needed in a template.

3. Adding multiple data fields in a single action

Now you will learn how to add **multiple** data fields to the document in a single action. We will add the name and job title of the sales representative who is the sender of this letter, to the end of the body.

1. Toggle to the **Design** view of the document.
2. Place the cursor after the text “Best Regards” and insert a few new paragraphs.
3. Select the **rep_first**, **rep_last** and **rep_title** field in the **Data Model** pane by clicking each field while pressing the Ctrl key.
4. Drag the selected fields to the end of the document.
An expression for each of the fields is added at the cursor position. The expressions are placed

on a single line. The document shows the following expressions: `{{rep_first}}{{rep_last}}{{rep_title}}`.

5. Type a space between `{{rep_first}}` and `{{rep_last}}`.
6. Place your cursor between `{{rep_last}}` and `{{rep_title}}` and press Shift + Enter to put the job title on a new line.
A line break is added to the text. (In HTML this is the `
` element, as you can see in the **Source** view of the document.)
7. The expressions can be formatted via the **Format** menu and the icons on the toolbar. Select the expressions `{{rep_first}}` and `{{rep_last}}` and click the **Bold** icon on the formatting toolbar.
8. Toggle to the **Preview** mode and note that the value that replaces the expression is formatted just like the expression.



4. Creating an address block

In this step you will learn how to add variable data, not by dragging data fields to the document but by using the **Handlebars Text Helper wizard** instead.

One of the big advantages of using a Handlebars Text Helper wizard is that it facilitates skipping empty lines when data fields are empty.

The Handlebars Text Helper wizard creates a *Helper* that concatenates multiple data fields and that can add a prefix and/or suffix to each data field.

Note: A *Helper* is a function that can be used in an expression.

1. Open the **Handlebars Text Helper** wizard: on the **Scripts** pane at the bottom left, click the black triangle on the **New** button and click **Handlebars Text Helper**. The Edit Text Helper dialog appears
2. Change the **name** of the Helper so that it clearly describes the purpose of the script (e.g. *setAddress*). The name must be unique.
3. The Handlebars Text Helper wizard allows to select the data fields that need to be combined. Each field is placed on its own line in the wizard. New lines can be added by clicking the Plus sign next to the table or simply by clicking on the next empty line.
The **Prefix** and **Suffix** fields add text to the data of each field.

Note: When a data field is empty the respective line is skipped including its prefix and suffix.

Add lines for the following fields and set the respective suffix text.

Prefix	Field	Suffix
	company_name	 (adds a line break)
	first_name	one space
	last_name	
 	address	
 	city	, (comma, then space)
	province	 (two non-breaking spaces)
	postal	

Note: The reason for using two non-breaking space characters (represented by the HTML entity “ ”) instead of two regular spaces, is that in HTML by default multiple standard spaces will be collapsed to a single space character.

4. Under **Options**, verify that **HTML** is selected as Insert Method.
5. Click **OK**. The name of the Helper, *setAddress*, is added to the **Scripts** pane under the **Control** scripts folder
6. In the template, remove the text "*@address@*" at the start of the letter body.
7. In **Design** mode, drag and drop the *setAddress* Helper from the **Scripts** pane to the cursor position. Alternatively, you can write the name of the Helper, enclosed in double curly braces: **{{setAddress}}**.

This creates an address block that will look like this:

```
company_name
first_name last_name
address
city province postal
```

8. Toggle to the **Preview** mode and use the browse buttons of the **Data Model** pane to navigate through the records.

Position the address block

Some records do not contain a **company_name** value. For those records, the **company_name** line, including the `
` line return, will be absent. The **city province postal** line goes up or down one position.

This can be handy, but in this case the entire content of the letter moves up and down with the address.

There are several ways to overcome this problem. One is to insert an **absolute positioned box** via the toolbar and enter the `{{setAddress}}` expression in that box. When using an absolute positioned box, the address block will no longer affect the position of the body, as it hovers above the main flow.

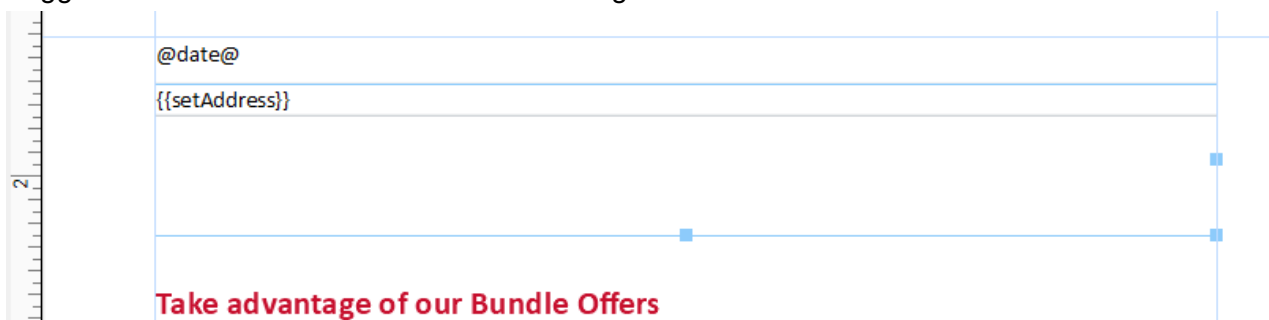
Another solution is to wrap the expression with an **inline box** and set the height of that box.

To wrap the address in an *absolute positioned box*:

1. In the **Design** mode, place the cursor in the expression `{{setAddress}}`. The breadcrumbs read **p**.
2. Choose **Insert > Wrap in Box**. The **Wrap in Box** dialog appears.

Note: The Wrap in Box dialog allows to assign an ID or a class to the box. Scripts that use an ID or class as selector generally run faster than text scripts.

3. Click **OK**. The paragraph containing the expression `{{setAddress}}` is now wrapped in a box (an HTML `<div>` element) with resize handles.
4. Change the height of the box so that it is big enough to contain the address. Push the subject line down.
5. Toggle to the **Preview** mode and browse through the records.



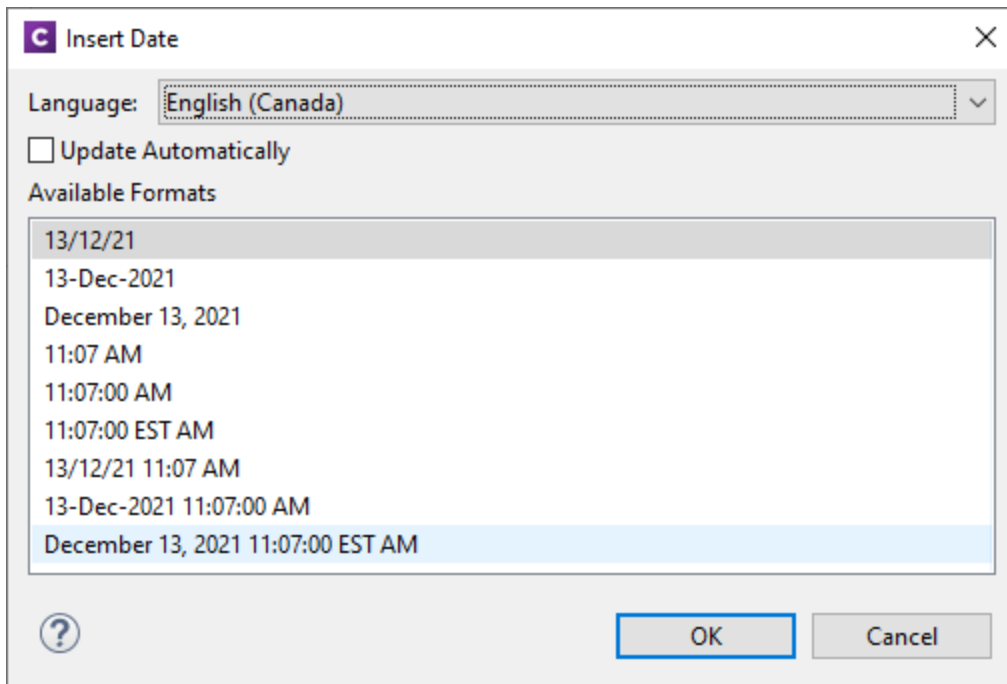
5. Adding a dynamic date

In Connect Designer you can quickly insert a date. When you are preparing a template today and finish it tomorrow, the date can be updated automatically, so you don't have to manually delete earlier dates.

To replace the “@date@” placeholder with a date:

1. Toggle to the **Design** mode and select the “@date@” placeholder at the beginning of the template.

2. Choose **Insert > Date...**. The **Insert Date** dialog appears.



3. Select a language to define the notation of the date.
4. Select the **Update Automatically** checkbox and choose the format of your preference.
5. Click **OK**. A date script is added to the **Scripts** pane. This script returns today's date.
6. Toggle to the **Preview** mode to see the script in action.

6. Creating a conditional paragraph

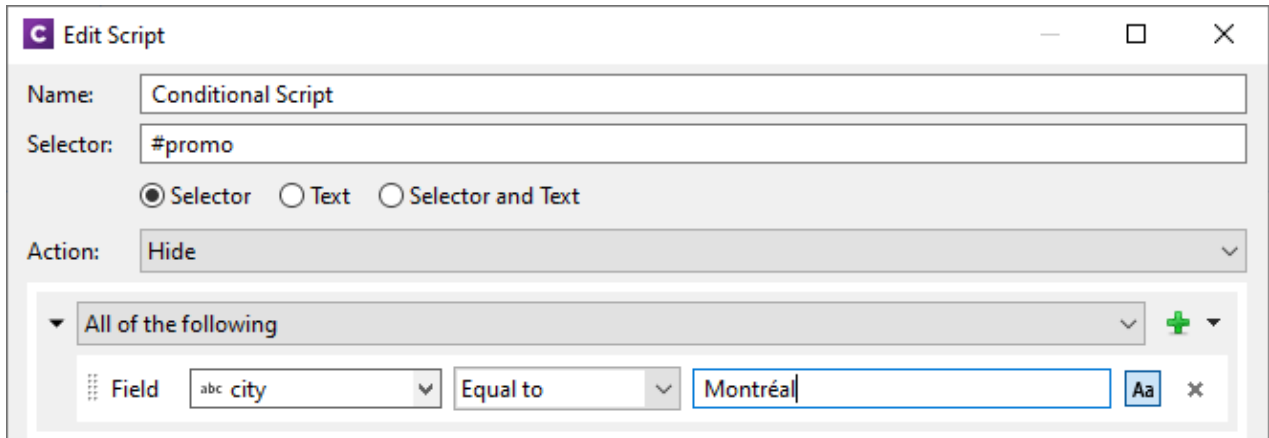
In this exercise you will learn how to create conditional content using the **Make Conditional** script wizard. This wizard provides a user interface to define when a certain element (or elements) should be hidden or shown. In this case we will show a paragraph for recipients living in the city of Montréal and hide it for others.

1. Toggle to the **Design** mode and place the cursor in the paragraph that starts with the text: "If you have friends living close by". The paragraph is now selected.
2. On the **Attributes** pane, type **promo** in the **ID** field.
3. Right-click this paragraph and select **Make Conditional** in the shortcut menu. The **Edit Script** script wizard appears.

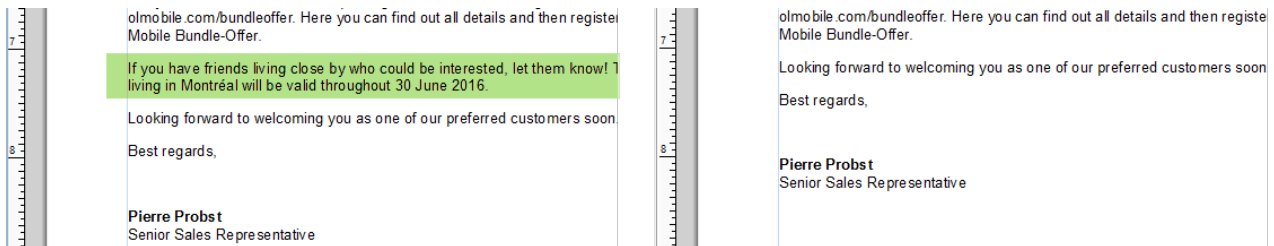
Note that the ID of the paragraph has become the **selector** of the script. The # sign is used to refer to an ID. A dot (for example: .promo) refers to a class.

4. Make the following settings:

- **Data field:** city
- **Operator:** Equal to
- **Value:** Montreal



5. Enter a meaningful name for the script and click **OK** to save the script.
6. Toggle to **Preview** mode and browse through the records. The paragraph is shown for residents of Montreal and is hidden for others. Note that the text below this paragraph moves up when the content is not shown.



Tip: The same technique can be used to show and hide images.

Working with images

Typically documents do not solely contain text. Often resources like logos and background images are added to complete the document. In this section you will learn how to work with images.

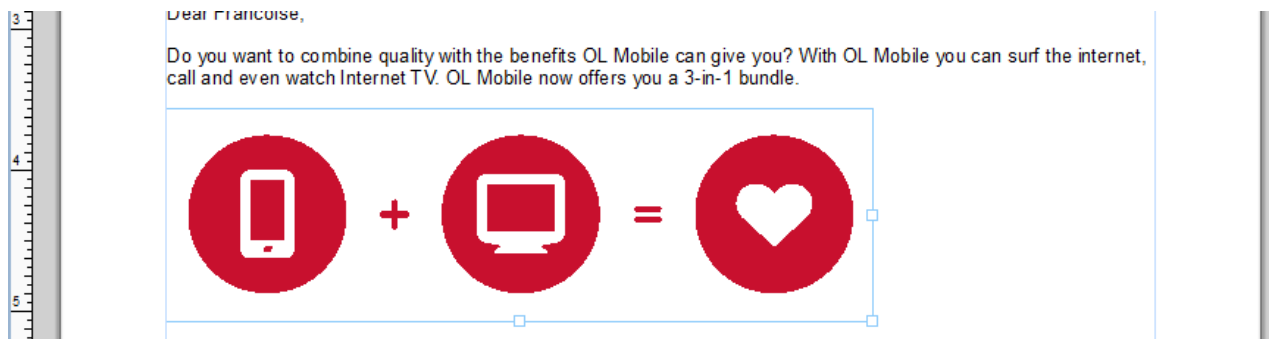
1. Importing and inserting images in the template

In this exercise you will learn how to import images and place them in your document. Images can be static elements or they can be dynamically replaced by scripts based on a data field.

1. Take a look at the **Resources** pane at the top left. In case the **Resources** pane is not shown, choose **Window > Show View > Resources**.

The **Resources** pane shows files and other resources belonging to the active document. Files added to the **Resources** pane travel with the document when it is copied, sent via email or published to the OL Connect PlanetPress/PReS Workflow component. The **Resources** pane is not limited to image resources; a document may require custom fonts, style sheets (CSS files), snippets, etc.

2. Locate the **Images** folder provided with this tutorial and copy **promo_banner.pdf** to the **Images** folder in the **Resources** pane.
3. Enter an empty paragraph below the paragraph ending with “OL Mobile now offers you a 3-in-1 bundle.”
4. Drag **promo_banner.pdf** from the **Images** folder to the new line. The image is inserted at the cursor position and anchored to the text. Adding new lines above the image will push the image down.



5. Select the image in the document and note that the **Source** field in the **Attributes** pane shows the path to the image: “images/promo_banner.pdf”. In this path, **images** refers to the **Images** folder in the **Resources** pane.

When selected, images can be resized by dragging the resize handles.

Tip: Keep the Shift key pressed while resizing to proportionally scale the image.

2. Adding a dynamic image

In this exercise you'll learn how to create a variable signature by using the **Dynamic Image script** wizard. The **Dynamic Image** wizard provides a user interface to compose the path to image files using values from a data field. (The same could be achieved using plain script, but this requires knowledge of JavaScript.)

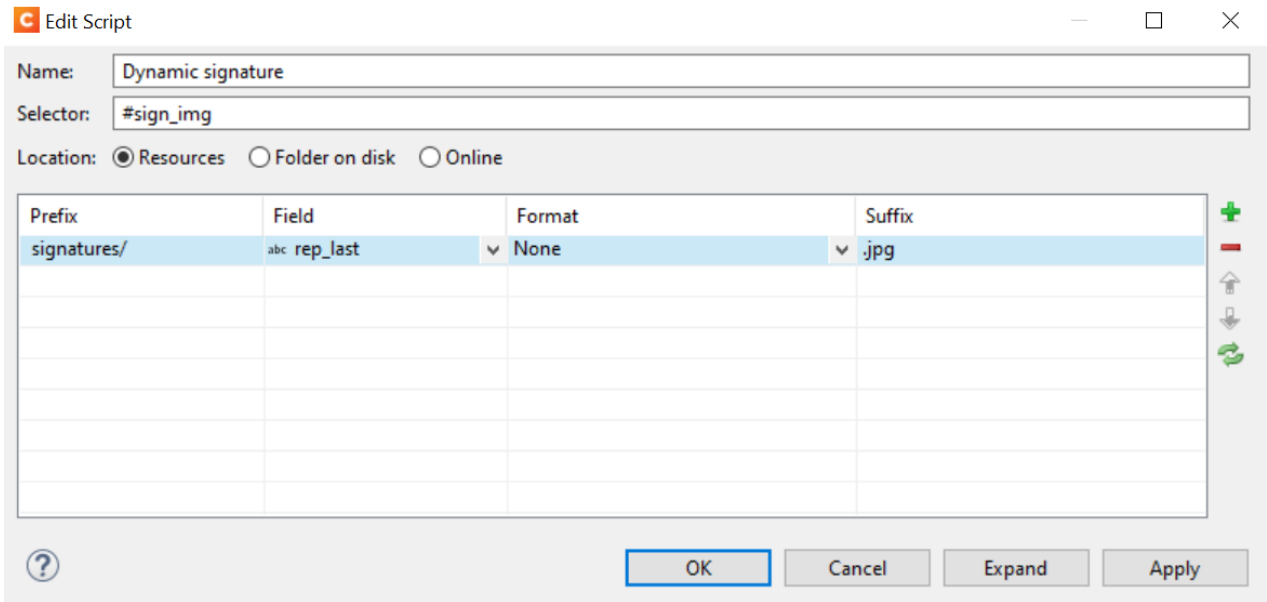
1. Import the images: locate the images folder provided with this tutorial and drag the signatures folder to the **Images** folder in the **Resources** pane.
The signatures folder contains three signature images: **Probst.jpg**, **van Houtten.jpg**, and **van Buel.jpg**. The value of the data field **rep_last** is equal to the name of one of these images.
2. Make sure there is an empty paragraph between "Best regards," and the name of the sales representative.
3. Drag the **Probst.jpg** file from the **Signatures** folder in the **Images** folder on the **Resources** pane to the empty paragraph. The image is placed inline and will flow with the text when paragraphs are added or removed (like with the conditional paragraph).
4. Click the image to select it. Its resize handles become active. Make the image a bit smaller (e.g. 75% of its original size).



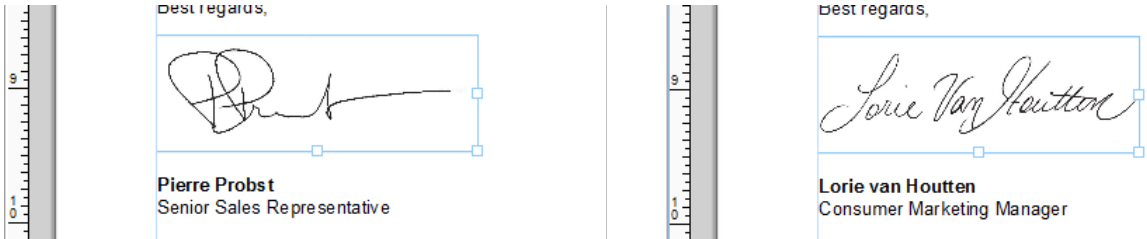
5. Right-click the image to show the shortcut menu. Choose **Dynamic Image....** The **Dynamic Image** wizard appears.

This wizard provides a simple way to replace images based on the value of a data field. In this case we are going to use the value of the **rep_last** data field to concatenate the path to the signature images. The three signature files already have the appropriate name.

On invoking the **Dynamic Image** wizard the path to the current image file is placed in the **Prefix** field and the file extension is added to the **Suffix** field.



6. Select **rep_last** in the drop down of the **Field** column. On previewing and outputting the document the data is concatenated with the prefix and suffix data, which results in the path to the respective signature files.
7. Enter a meaningful name for the script and click **OK** to save the changes.
8. Toggle to **Preview** mode and browse through the records. Note that the signature image is replaced and matches the respective account manager.



Note: In the exercise above, we used the **Dynamic Image** wizard to create a dynamic image based on a data field. A Dynamic Image script writes the path of the image to the **src** attribute of the respective image.

Position the image

To reduce the distance between the image and the name of the sales representative, set the margins Bottom and left to 5px and -5px, respectively.

If you have used the Dynamic Image wizard, an image is already inserted in the template. In this case, you can change the margins as follows:

1. Right-click the image and select **Image...** from the shortcut menu. The **Image properties** dialog appears.
2. Click the **Spacing** tab.
3. Uncheck **All sides** in the **Margin** section.
4. Enter **-5mm** in the **Bottom** field. This reduces the whitespace below the bounding box of the image.
5. Enter **-5mm** in the **Left** margin field to make the image 'hang' outside the text flow.



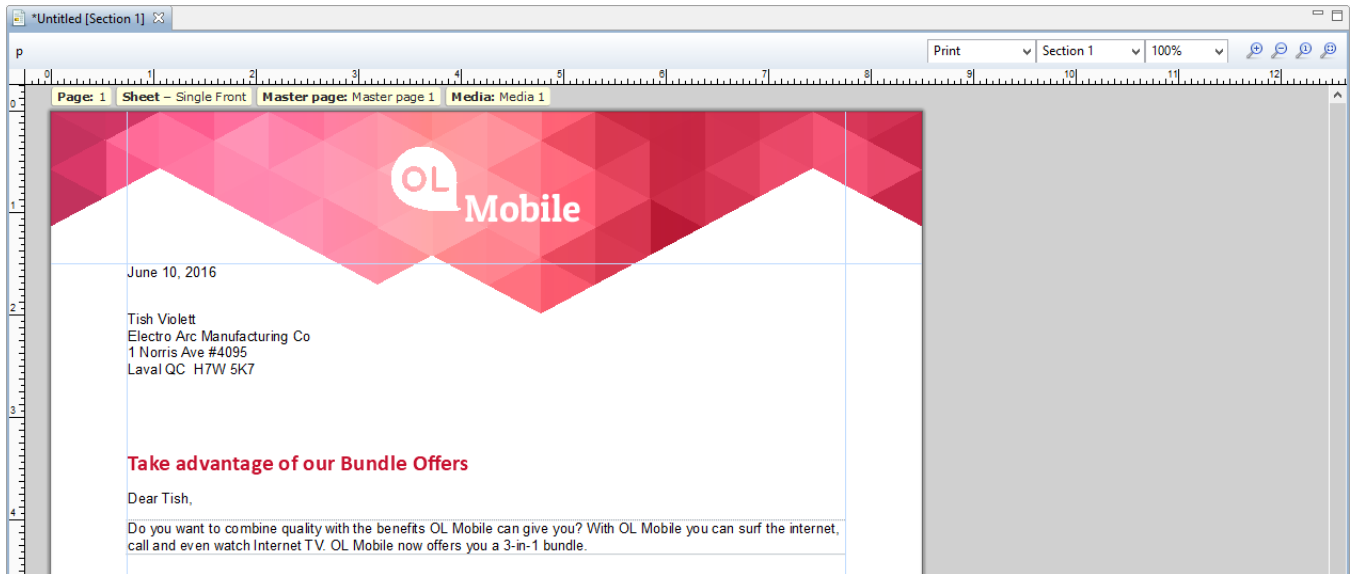
3. Adding a Virtual Stationery background

In this exercise you will learn how to set a PDF image as a background to emulate pre-printed paper. By specifying a so called virtual stationery image you will be able to preview the pre-printed media and position the content in the correct position. The image will be repeated for all pages that use this media.

To set a PDF as media:

1. First import the PDF: locate the file **letterhead.pdf** that is provided with this tutorial and drag it to the **Images** folder on the **Resources** pane.
2. Drag **letterhead.pdf** to the **Media 1** entry in the **Media** folder on the **Resources** pane. The first page in the PDF will be set as the image for the front side of the media.

After adding the image to the media you will see that the image appears in the background of the page (s).



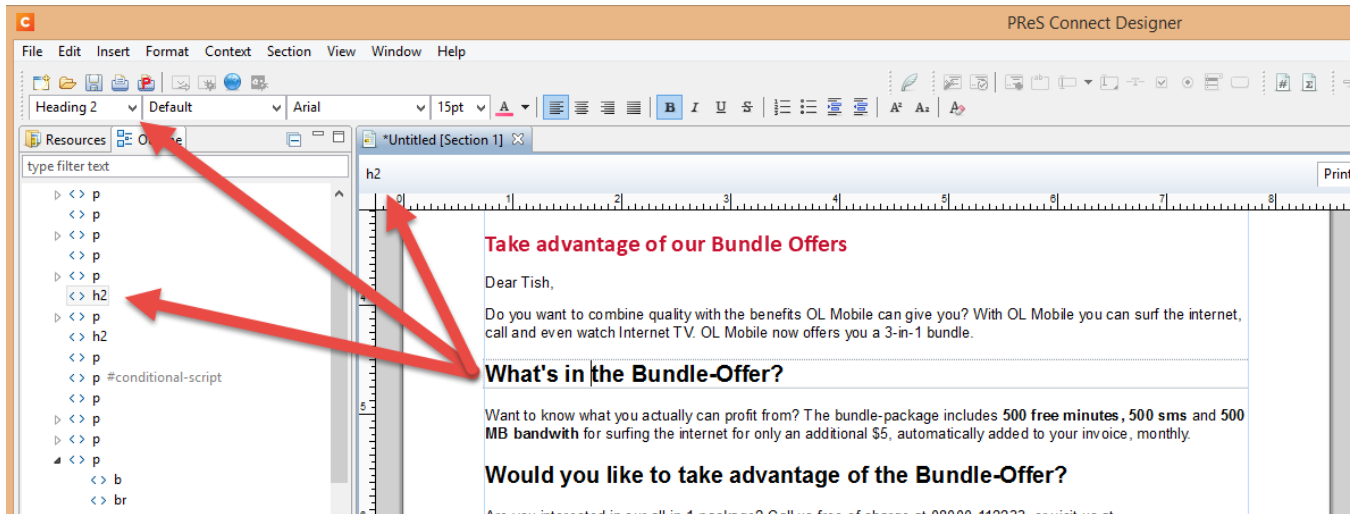
Alternatively you could open the **Media properties** dialog by right-clicking the **Media 1** entry and selecting **Virtual Stationery** from the shortcut menu. This dialog allows you to select the image for the front and back of the media and specify the position of the image.

Note: By default media backgrounds are omitted from the output (because in the end, the pre-printed paper will have this imagery). In case you are printing on blank paper you could print this background image together with the document by selecting the **Print Virtual Stationery** option in the **Advanced** section of the **Print Wizard** interface.

Working with style sheets

You've learned how to navigate the content and how to apply formatting to selected text. The **Outline** pane revealed two subheadings that inherited the Heading 2 style from MS Word. Both the **Outline** pane and the **breadcrumbs** show the underlying HTML element. These Heading 2 subheadings are identified by the <h2> element.

To change these headings into something else (a paragraph, or a heading of another level) you can use the **Formatting** toolbar (see the picture) or the menu: **Format > Paragraph Format**.



In order to change the way a heading or paragraph looks, you could select its text and use the toolbar buttons or open the **Formatting** dialog: choose **Format > Text...** This is called 'local formatting'.

However, instead of formatting elements locally, it is recommended to use **Cascading Style Sheets (CSS)**.

Style sheets are stored in a central location. They may save you a lot of time as you don't need to select text throughout the document and apply formatting to each instance manually: you can add a style rule to a style sheet to format several elements at the same time. Style rules ensure that formatting is applied consistently.

In Connect Designer, style rules can be made using the **Stylesheets** dialog.

1. Creating a style rule

In this exercise you will learn how to change the formatting of the level 2 headings with CSS, via the **Stylesheets** dialog.

1. Choose **Edit > Stylesheets...**, to make the **Stylesheets** dialog appear.
2. The selected context is **Global**. Style rules created in this context will apply to all context types. Use the drop-down to select the **Print** context. Style rules created for a specific context (in this

case, the **Print** context) will only be applied to sections in that context.

3. Click the **Plus** icon to create a new style rule.
4. Enter **h2** in the **Selector** field. The selector defines to which elements in the document the rule applies. By stating **h2** the rule applies to all level 2 subheadings.

The **Selector** field in the **New Rule** dialog accepts any standard CSS selector:

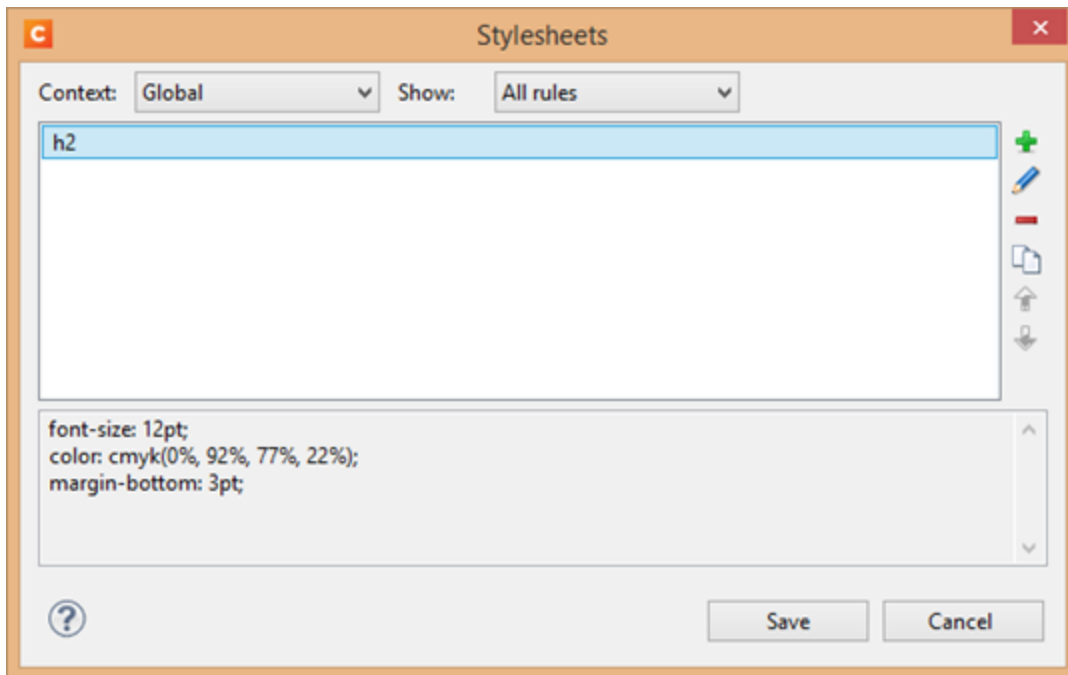
- an HTML tag (for example, type **p** to select all paragraphs)
- a class (for example: **.burgundy**)
- an ID (for example: **#intro**)
- a combination of CSS selectors (for example: **div#intro p.burgundy**, to select all paragraphs with the class **burgundy** in a **<div>** that has the ID **intro**); see http://www.w3schools.com/cssref/css_selectors.asp.

Note: In an HTML file, each ID should be unique. This means that a particular ID should be used only once in each section. A class can be added to multiple elements, even if those elements are of different types.

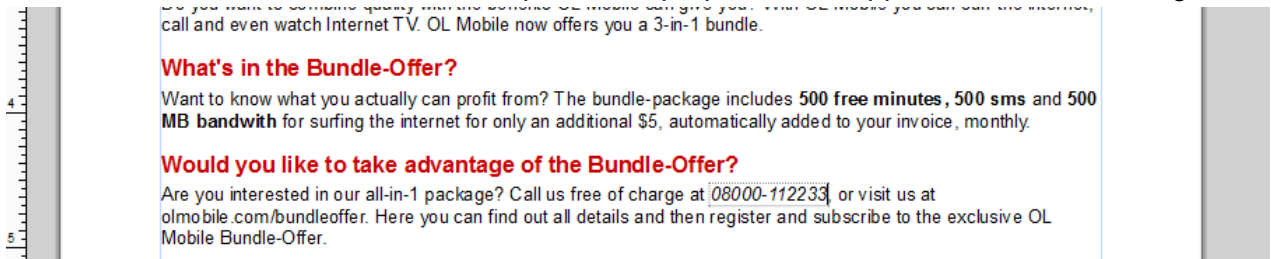
5. Make the following changes to the style properties on the **Type** tab:
 - **Font size:** 12pt
 - **Color:** Click the **Color Picker** icon next to the **Color** field and enter the following values (or use the eyedropper tool to pick the color of the subject line in the letter):
CMYK: Cyan 0, Magenta 92, Yellow, 77, Black 22
6. Click **OK** to close the **Color Picker** dialog and go to the **Spacing** tab.
7. Make the following settings in the **Margin** section:
 - **All sides:** uncheck
 - **Margin bottom:** 3pt
8. Click **OK** to create the style rule.

Note that the lower part of the **Stylesheets** dialog shows the style declarations for the selector in

the upper part of the dialog.



9. Click **Save** to store the rule with the template. The properties are applied to the subheadings.



10. Place the cursor in one of the headings and take a look at the **Styles** pane at the top right: the style rule that you made is visible here.

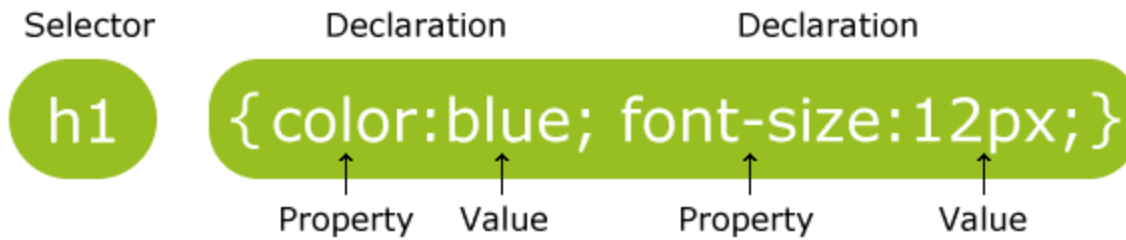
Note: The **Styles** pane also shows a link to where the style rule is located: in the CSS file context_all_styles.css. You could click the link to open the CSS file in the workspace and edit it directly.

2. Editing a style sheet

As you've seen in the **Stylesheets** dialog, a rule consists of a **selector** and a set of **declarations**.

The selector points to the HTML element you want to style.

The style-set contains one or more declarations, each ending with a semicolon. A declaration includes a **property name** and a **value**, separated by a colon.



In this exercise you will change a CSS file directly, instead of via the **Stylesheets** dialog. As you gain more knowledge of CSS, this option will become increasingly convenient.

This letter is designed to fit on one page. But in a longer letter, the signature image and the name of the representative might sometimes end up on different pages. These elements should stick together. This can be arranged using the CSS **page-break-after** property.

1. Select the paragraph that contains the name and title of the representative: place the cursor in the paragraph and then click on **p** in the breadcrumbs.
2. Give the paragraph an ID: on the **Attributes** pane, type **rep** in the **ID** field. This ID will be used as the selector of the style rule.
3. On the **Resources** pane, expand the **Stylesheets** folder and double-click **context_print_styles.css**. The file opens in the workspace. As you can see, it already contains the selectors and style rules that were added via the **Stylesheets** dialog.
4. Add the following style rule:

```
#rep {  
    page-break-before: avoid;  
}
```

Tip: Type Ctrl + Space to get suggestions. As you start typing, the list of suggestions will get shorter. Use the arrow keys to select a suggestion and press Enter to insert it in the style sheet.

5. Save the file: press Ctrl + S.

Using Master Pages

Each new Print template automatically gets one Master Page. A Master Page is a layer between the Media and the pages in Print sections. Master Pages are meant to contain headers, footers and all other elements which aren't part of the text flow. With Master Pages you can make elements appear on multiple pages, or only on the first or last page of the section. Unlike the Media, Master pages are printed when the template is merged with a record set.

1. Adding an element to a Master Page

This exercise shows how to add an element to a Master Page.

1. Open Master page 1: on the **Resources** pane, open the **Master pages** folder and double-click **Master page 1**. The Master Page is opened in the workspace.
2. Add a Positioned Box by clicking the **Insert Positioned Box** icon on the toolbar.

Tip: Elements on a Master page aren't part of the text flow, so they need to stay in place. Therefore they have to have an absolute position, or be located in another element that has an absolute position.

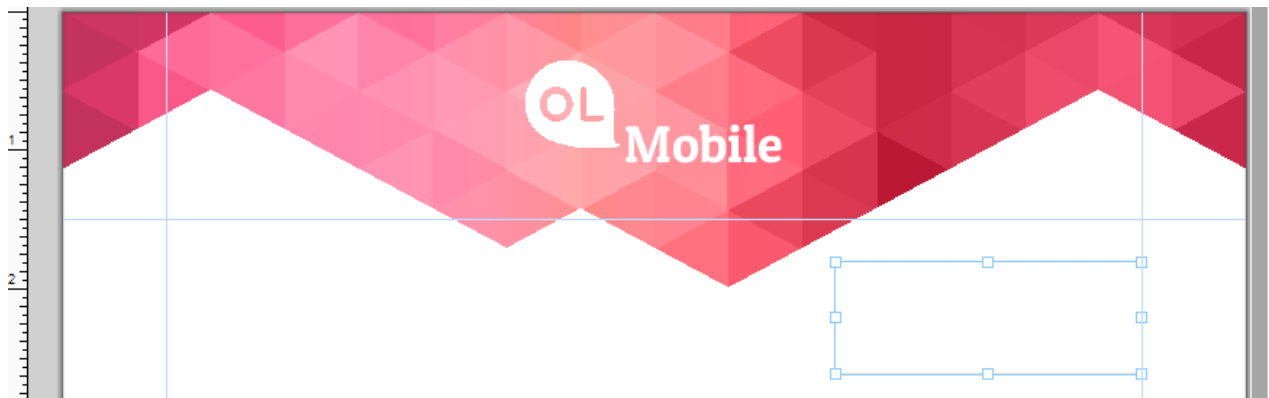
3. Position the box to the top right of the page, in a way that it doesn't overlap with the letterhead. Clicking on one of the borders of the box allows you to drag it. Click on one of the small squares to resize it. Alternatively, you could type its top, left, width and height on the **Attributes** pane, for example:

Y-offset: 1.8in

X-offset: 5.55in

Width: 2.2in

Height: 0.8in



4. Click inside the box and type the following text:

OL Mobile

2030 Pie-IX Blvd, Suite 500
Montreal (QC) Canada, H1V2C8
www.olmobile.com

Tip: Click Shift + Enter to insert a line break.

5. Reopen the Print section by double-clicking it. You will see that the address is now shown on every page of the Print section.

2. Adding and applying Master pages

The address on the Master Page appears on all pages of the section, but it only needs to be visible on the first page of the section. The solution is to add a second Master Page and to apply each Master Page to different pages, or rather 'sheet positions'. This exercise shows how to do that.

1. On the **Resources** pane, right-click the **Master pages** folder and select **New Master Page**.
2. A small dialog will appear with a name for the new master page (Master page 2). Click **OK** to accept the proposed sizes and add the new Master Page.
3. On the **Resources** pane, open the **Context** folder, and in the **Print** folder, right-click the section (**Section 1**) and select **Sheet Configuration...**
4. Uncheck the option **Same for all positions**. In this context, a **position** is the position of a sheet in the output. A sheet can be the first or the last sheet in the output, or one of the sheets in between. If the output consists of one sheet, it has the 'Single sheet' position.
5. For the front of the **First Sheet** and **Single Sheet** position, select the Master Page with the address box: use the **Master Page Front** drop-down to select **Master page 1**. (When **Duplex** – double-sided printing – is not enabled, you can only select a Master Page for the front.)
6. For the **Middle Sheet(s)** and **Last Sheet** position, select **Master page 2** as the Master Page for the front.
7. Click **OK** to close the dialog and apply the changes.
8. Toggle to **Preview** mode to verify that the Master pages are displayed correctly.

Using scripts and snippets

So far you have been using wizards to create personalized and dynamic content. The wizards are dialogs that hide the underlying script code. You can see this in any script wizard when you click the **Expand** button. This button opens the Script Editor which lets you edit the script directly.

The Script Editor allows to select elements in a template and apply an action to them. The selection is not limited to items inside sections; scripts may also control elements on master pages, email headers, etc.

Actions include changing styles and formatting, hiding/removing elements, replacing elements and injecting content (from HTML snippets, for example).

In Connect Designer all scripts are written in JavaScript, a scripting language that was originally developed to create interactive web pages. For this chapter you don't need to know anything about JavaScript – you may copy the script - but it will pay off to learn the basics. Many books are published about this subject and many websites provide tutorials, code snippets and other resources (Google is your friend).

This chapter explains how to write your own script, without a wizard. The script will insert part of a snippet (a small HTML file) in the template, depending on the value of a field in the record set.

1. Importing a snippet

The company, OLSG-Mobile, has several offices. This exercise shows how to import a snippet that contains the addresses.

Snippets are imported in much the same way as images are imported.

1. Locate the snippet **olsg_address.html**, provided with this tutorial.
2. Copy the snippet into the **Snippets** folder in the **Resources** pane. (If asked, click OK to accept the encoding.)
3. Double-click the new snippet to open it in the workspace.
4. Click the **Source** tab at the bottom of the workspace, to view the HTML of the snippet.

Every paragraph in this snippet has an ID that is identical to one of the values used in the province data field, as you can see in the **Data Model** pane. In the following exercise these ID's will be used to select a paragraph from the snippet and insert that in the template.

2. Inserting a snippet via script

In this exercise you will learn how to write a script that fills the box on Master page 1 with a variable address: the address in Ontario or the address in Québec. A customer living in Ontario should see the Ontario address. All other customers should see the address in Québec. The two addresses are stored in the snippet that you imported in the previous exercise.

1. Open the Master Page that contains the address box.
2. Select the box (**div**) using the breadcrumbs.
3. Give the box an ID: on the **Attributes** pane, in the **ID** field, type `office`.
4. Right-click the box. Make sure not to right-click the text inside it.
5. Choose **New Script** from the shortcut menu. The **Script Editor** appears. The name and selector of the script are added automatically. The ID of the box is used as the script's selector.
6. Change the script name to **Change Company Address**.
7. Add the following script.

```
var office = loadhtml("snippets/olsg_address.html", "#" +  
    record.fields.province);  
results.html(office);
```

In **Preview** mode and when output is generated, this script will read the value of the **province** field in the current record. It will load the paragraph that contains the address of the office in that state value from the snippet and insert that in the template.

Note: The functions used in this script are documented in the [Designer Scripts API](#) in the online documentation.

8. Click **OK** and switch to **Preview** mode to see if the correct address appears in the template.

