|  |  |
| --- | --- |
| **Instant Database and Variables** | |
| **Variables**  Structure: [Client Name]  Multiple Choice (separate choices with slashes): [Arnie Attorney/Laurie Lawyer/Cary Counselor]  Grouped (selection of one value changes all other values in same group): [!spouse!husband/wife] [!spouse!he/she] [!spouse!him/her]  Titled (advise end-user what the variable refers to): [custodial parent:mother/father]  Default value: Insert a # before the choice you want to use as default value. [colors:red/blue/#green/orange]  **Calendar:** If the variable contains the word ‘date’ in any form, a green calendar button will appear in the space between the two columns. Click it and a calendar will appear.  **Equivalency function**: Set the value of a variable to equal a preceding variable. “=[Client Name]. A red toggle button with appear. Click to assign the value to the precedent variable.  **The IDB screen**  **Double Click Actions**  On variable side:  Transfer bracketed variable over (but without brackets). Shift-double click transfers the brackets.)  On value side:  Toggle date from short to middle to long style  Toggle case from all caps to all lower case to upper/lower case  **[Date] tricks:**  A single variable ([e.g., [Date of Contract] serves as base for all other variations.  [Date of Contract] | [Date of Contract(ext)] [Date of Contract(day)] | [Date of Contract(month)] [Date of Contract(mon)] | [Date of Contract(year)] [Date of Contract(yr)]  [Today] or [-Today-] (the former preserves the value in the IDB; the latter does not.  **Folders**  A variable can be a folder so you can select and insert an entire document in place of the variables  Titles (vs. group)  Default ‘#’  If single value | **Intelligent A [\*\*a/an]:** Place before a variable when the ‘article ‘ is not known. Eg., ‘a Florida corporation’ vs. an Ohio LLC. [88a/an] [\*State\*] [\*corp type\*]  **Math:** Simple math (+,-,/,x) up to four operands is possible. ‘[Total]’ ‘=[Quantity] x [Price] + [Shipping]  **Date Math: ‘[Due Date]’ ‘=[Today] + [30 days]’**  **List of Variables**  **Power Tools (the red button)**  **Alphabetize: primarily used to confirm existence or spelling of variables**  **Mask: the simplest of intake forms. Instead of scanning for variables, just save out a set as a mask. Easily editable.**  **Delete unused variables:** Click the box labeled “Delete unused variables” to get rid of variables like [Address 2], etc. when not used. The extra lines or spaces are also removed.  **Variable Creation Wizard:** Quickly change all instances of ‘John Doe’ to ‘[Client Name]’ in the document you are ‘Pathagorizing.’  **Variables DropDown List: A special DDL. Use it to quickly insert a variable in a document you are Pathagorizing. Insures consistent spelling.**  **Special Situations:**  **No save:** to indicate that the value for a particular variable should not be saved, add a hyphen to both ends of the variable: [-Date of Contract-]  **Non-English Users: Save as Unicode.**  **Spell-out functions: <s>,<ss>, <$>, <$$>**  **Unicode**  If you need non-standard characters (typically Chinese, Russian, Hebrew, Arabic and other languages where a different characters set altogether is needed) turn on Unicode from All Settings | Instant Database. |

| **Task** | **Boundary Markers** | **Example** | **Result after entering term or making choice** |
| --- | --- | --- | --- |
| **Simple variables.** (Variables are place holders in documents which will be replaced with personal text.) | **“["** and **“]”** surrounding the variable.  A variable name can be 1 to 40 characters | … by and between [**Party 1**], party of the first part …. | after entering “*John Smith*” in Instant Database screen,  … by and between John Smith, party of the first part . . . |
| **Multiple Choice variables.** (Variables used to provide short choices from which the end user can select. | **[choice1/choice2/choice3]** | [he/she/it] ; [red/yellow/blue/white] | Dropdown of multiple choices is presented in Instant Database screen for selection. |
| **Default** |  |  |  |
| **Groups** | **! and !(within a variable)** |  |  |
| **Aliases** | **\*and \*(within a variable)** |  |  |
| **Titles** |  |  |  |
| **The *‘Intelligent A’*** | **[\*\*a] or [\*\*a/an]** | **[\*\*a] [Alabama/Georgia/Florida] corporation** | Processed after you select noun, Intelligent A will automatically become the appropriate article. |
| **Calculations (in line)** | **“[#Math#***varname***=”** and **“]”** | You ordered [quantity] widgets at [price] each. The total of your order is [#Math#**totprice**=[quantity] x [price]] | If quantity is 50 and price is 2 then totprice will be 100. |
| **Date Math** (Add any time period to a fixed date. Calculate the ‘calendar’ results of the date math, or the ‘expiry’ date (the day before the calendar result). E.g., Jan 1 + 2 weeks is Jan 15 on the ‘calendar.’ The ‘expiry date’ of that calculation is Jan 14 (at midnight) | **“[#Math#***varname***=”** and **“]”**  (the presence of “day”, “week”, “month” or “year” in the second operand triggers date math.)  If the *varname* starts or ends with Age, an age will be calculated. | The contract will begin on [start date] and will terminate in three months, to wit: [#Math#**end date**=[start date] + [3 months]]  I was born on [Birthdate] and I am [#Math#MyAge=[today]-[birthdate]] years old. | If start date=[January 1, 2013] , the end date will be March 1, 2013. (If you want the ‘expiry date,’ i.e., the day before, insert “(exp)” after ‘days’, ‘weeks’, etc.) E.g., [#Math#**end date**=[start date] + [3 months(exp)]] |
| **Date functions: (ext), (day), (month), (mon), (year), (yr)** | **[dateterm(ext)** | [Date of Contract(ext)] |  |
| **[Today]** |  |  |  |
| **‘Don’t save’** | **- and -** | [-Date of Contract-) |  |
| **Spellouts: <s>, <ss>,<S>,<SS>,<$>,<$$>,<%>** | **<s>[Variable] or [Variable]<s>** | <<$$>>[Purchase Price] | $5,432.10 (Five thousand four hundred thirty-two and 10.100 dollars |