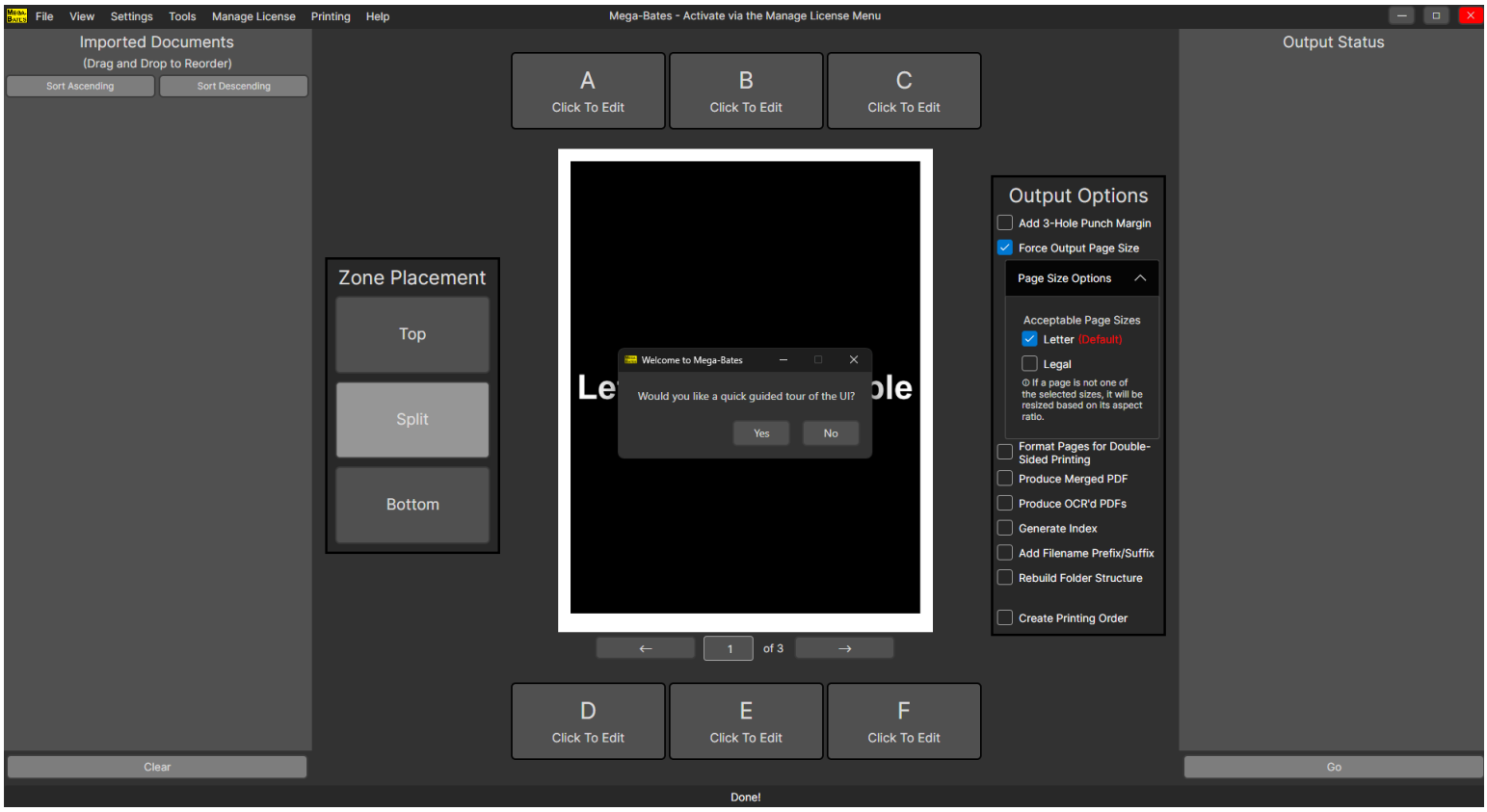
Mega-Bates User Guide

Before we begin, we want to thank you for giving Mega-Bates a try! We're confident that it will be a huge time saver for you and your team. If you ever encounter a roadblock while using Mega-Bates, have questions on how to accomplish specific tasks (creating Bates labels, exhibit stickers, etc.), or need clarification on anything in this guide, please don't hesitate to reach out to our support team 24/7 by email at **support@mega-bates.com** or by phone at **(210) 879-4593**! Our contact information is also on our website: https://mega-bates.com/contact-us/. Our phone number is also available within Mega-Bates via the Help menu, even if you aren't connected to the internet.

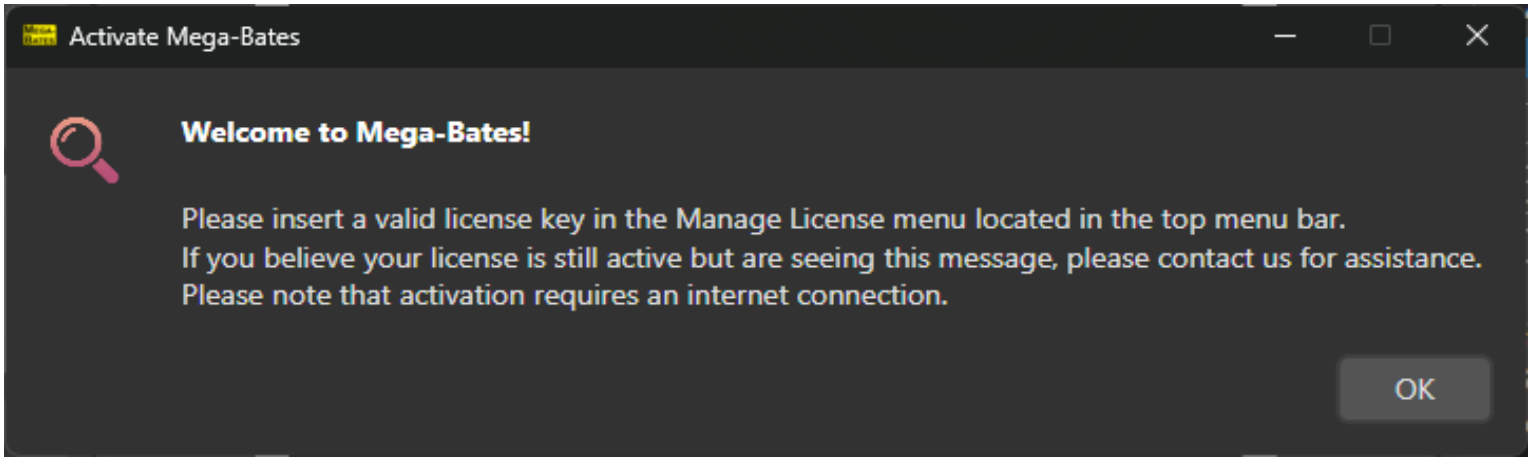
Getting Started

Below is the screen you're greeted with when you first launch Mega-Bates. A Quick Tour message will be visible.



Feel free to go through the tour to explore all of the pieces of the interface! You can also skip it for now and relaunch it from the help menu at any time for a refresher.

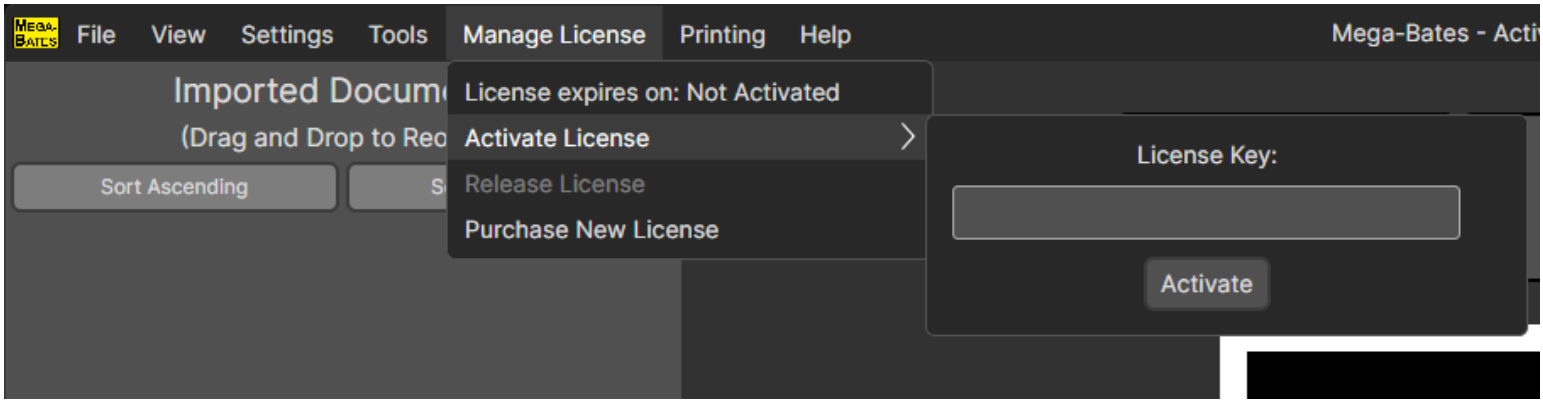
Next, you'll be prompted to activate Mega-Bates:



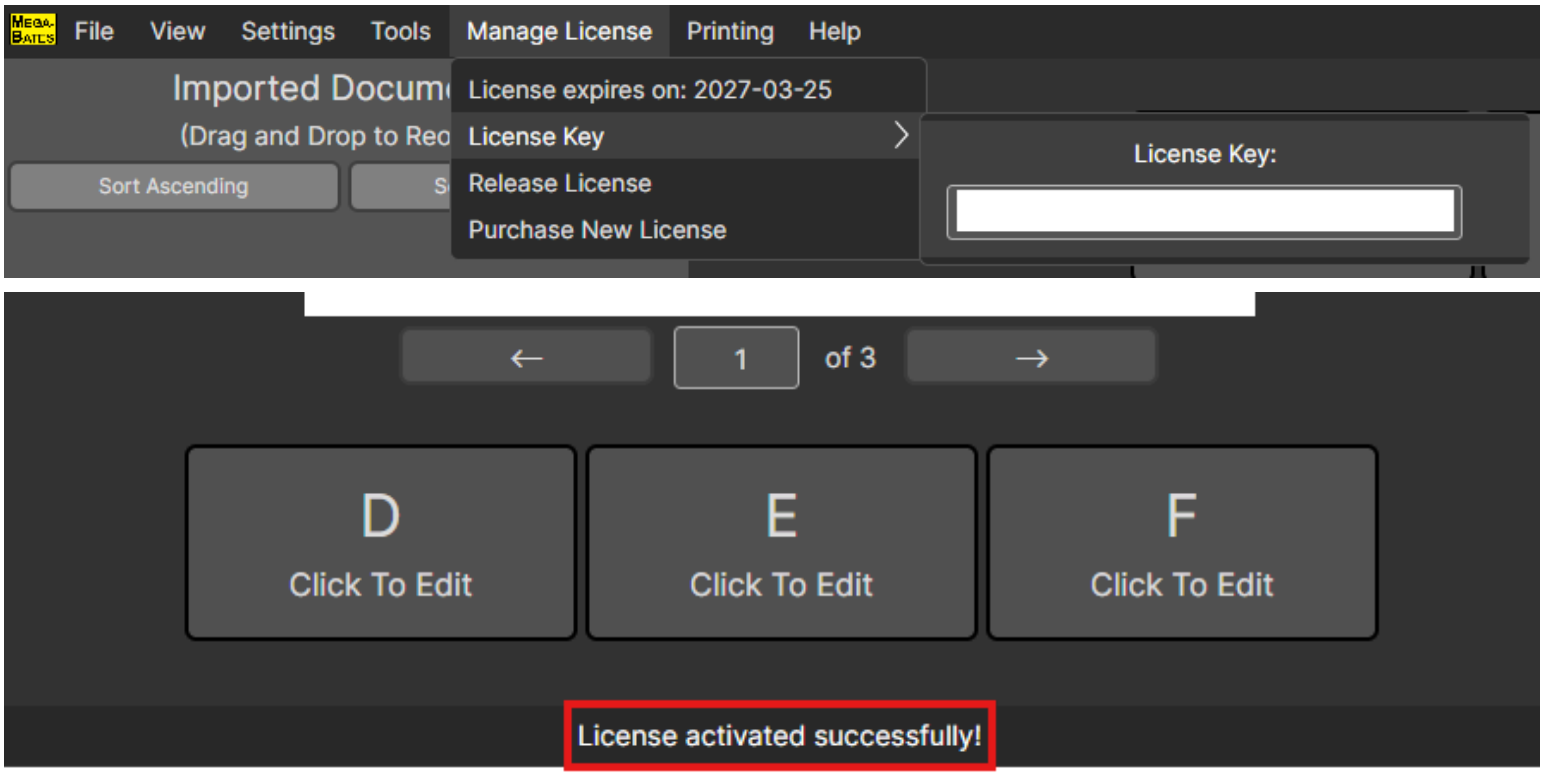
Make sure to have the email you received with your license key open on your computer. We'll need that to get Mega-Bates activated.

Activating Your License

After dismissing your welcome message, go to the **Manage License -> Activate License** menu on the top left of the interface.



Next, copy and paste the license key from your email into the text box. Click **Activate**.
Once activated, the **Activate** button should disappear and a **License activated successfully!** message should appear on the bottom status bar:



If you see this message, you're good to go! You should also now be able to see your license expiration date listed in the **Manage License** menu, along with the option to release your license. **If your activation didn't succeed, please reach out to our support team. We'll work hard to get it resolved. Please keep in mind that activation requires an internet connection.**

24/7 Support:
Phone: (210) 879-4593
Email: support@mega-bates.com

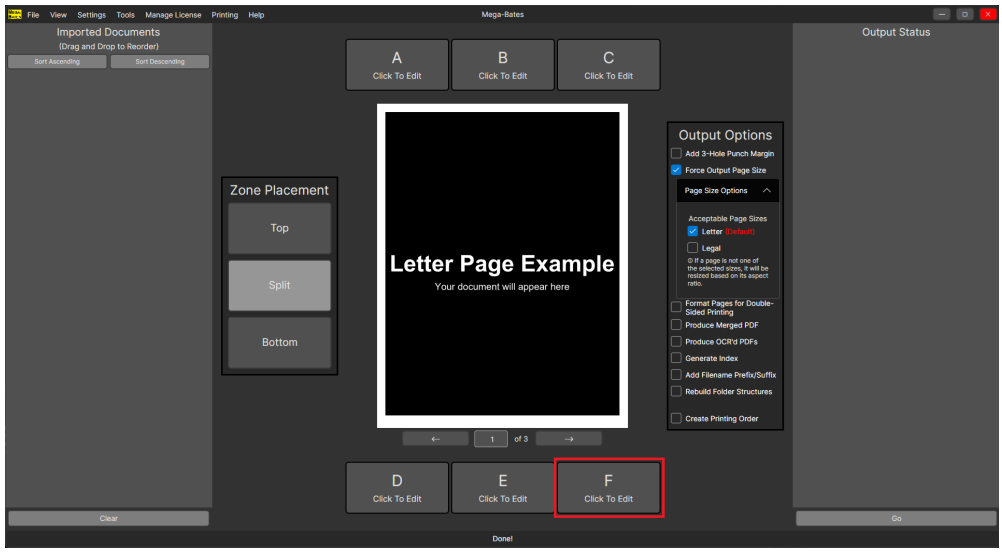
Quick Start

Let's jump right in with creating an easy Bates label! We'll go into detail about everything a little later, but let's see what we can accomplish with just a few basic steps. For this example, I'd like to create a Bates label structured like this:

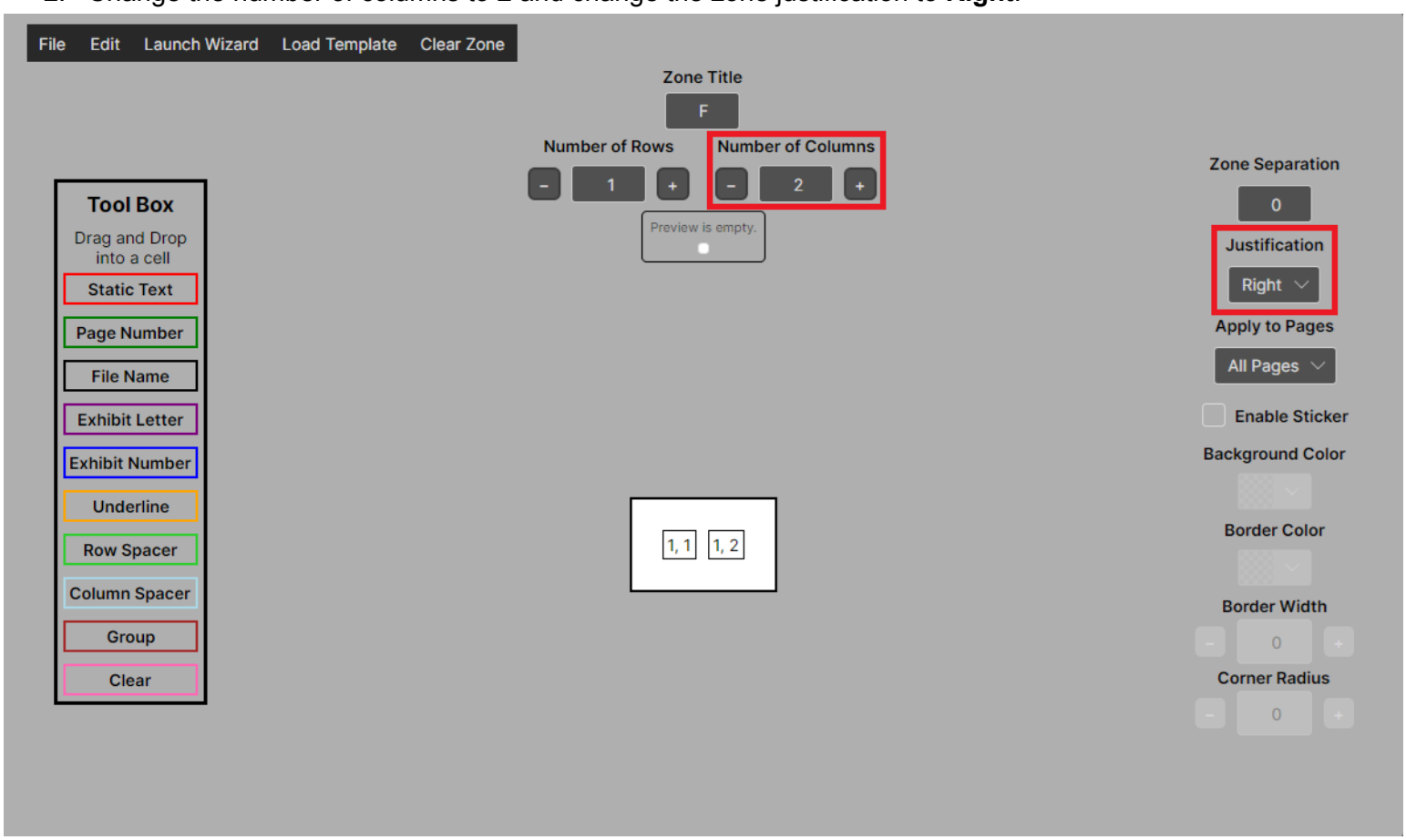
D.0001

This has 2 pieces: A static prefix (**D.**) and a page number with a length of 4 (**0001**).

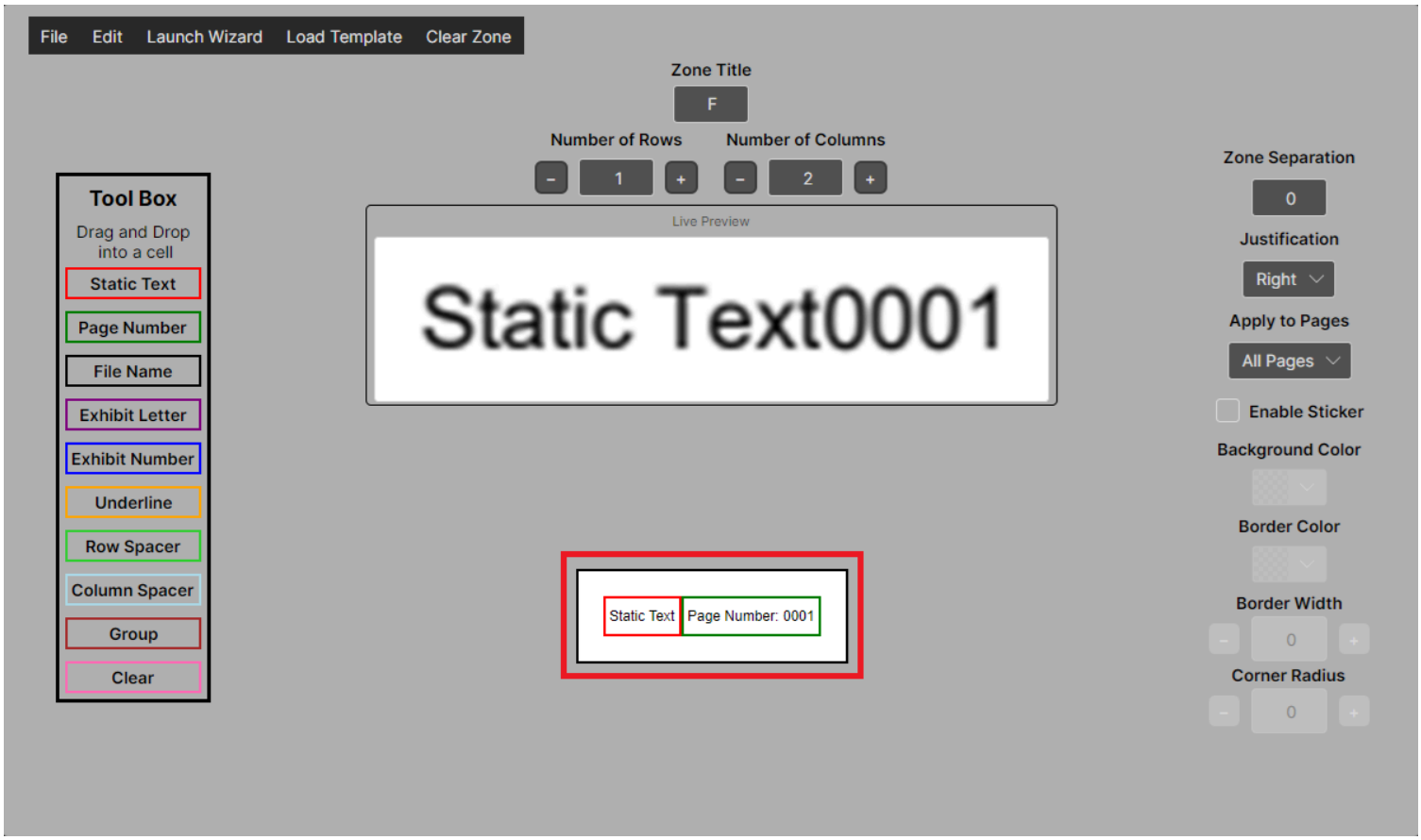
1. Select a zone to insert your Bates label. I'd like the label in the bottom-right of the document, so I'm clicking on zone F:



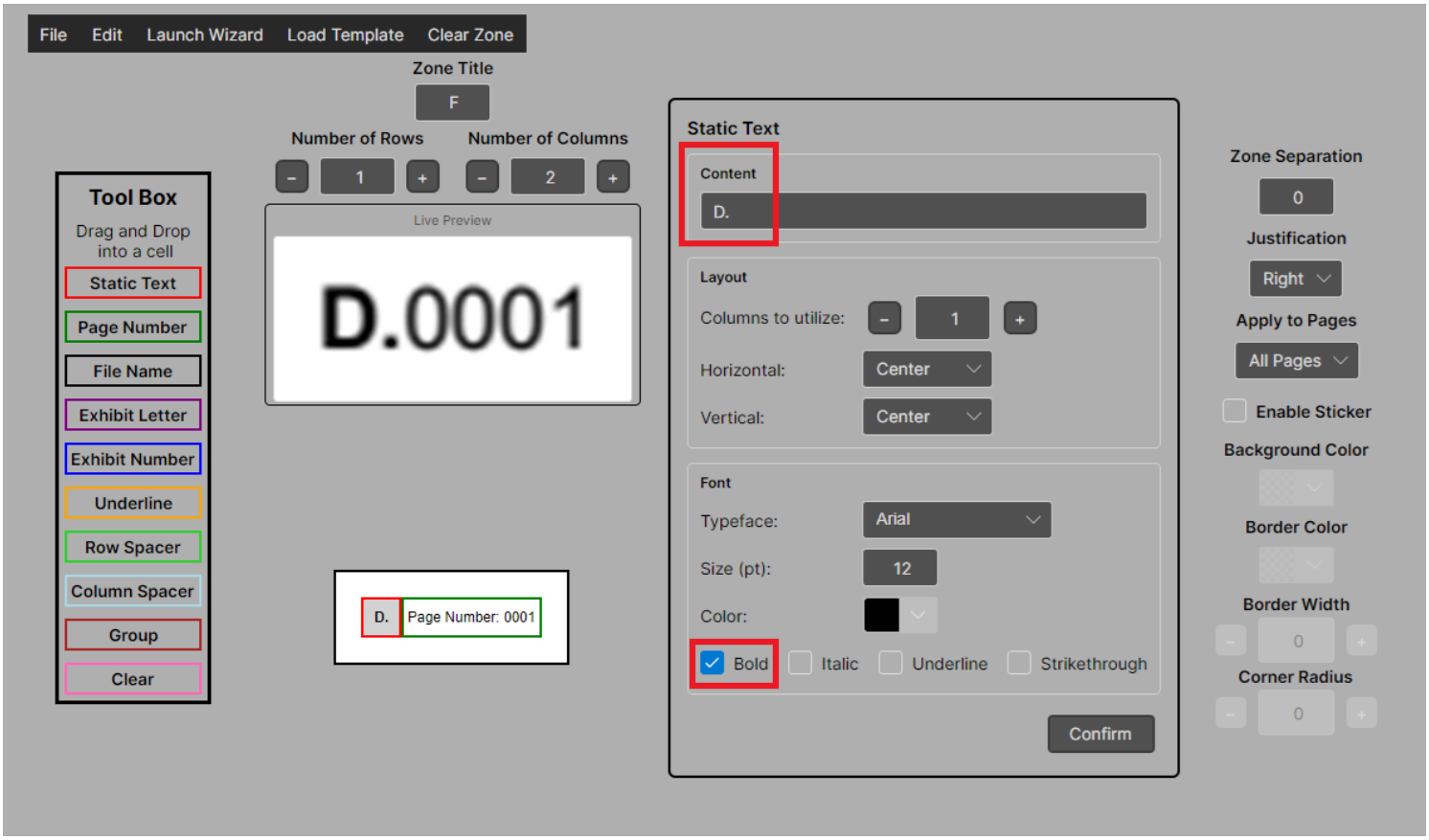
2. Change the number of columns to **2** and change the zone justification to **Right**:



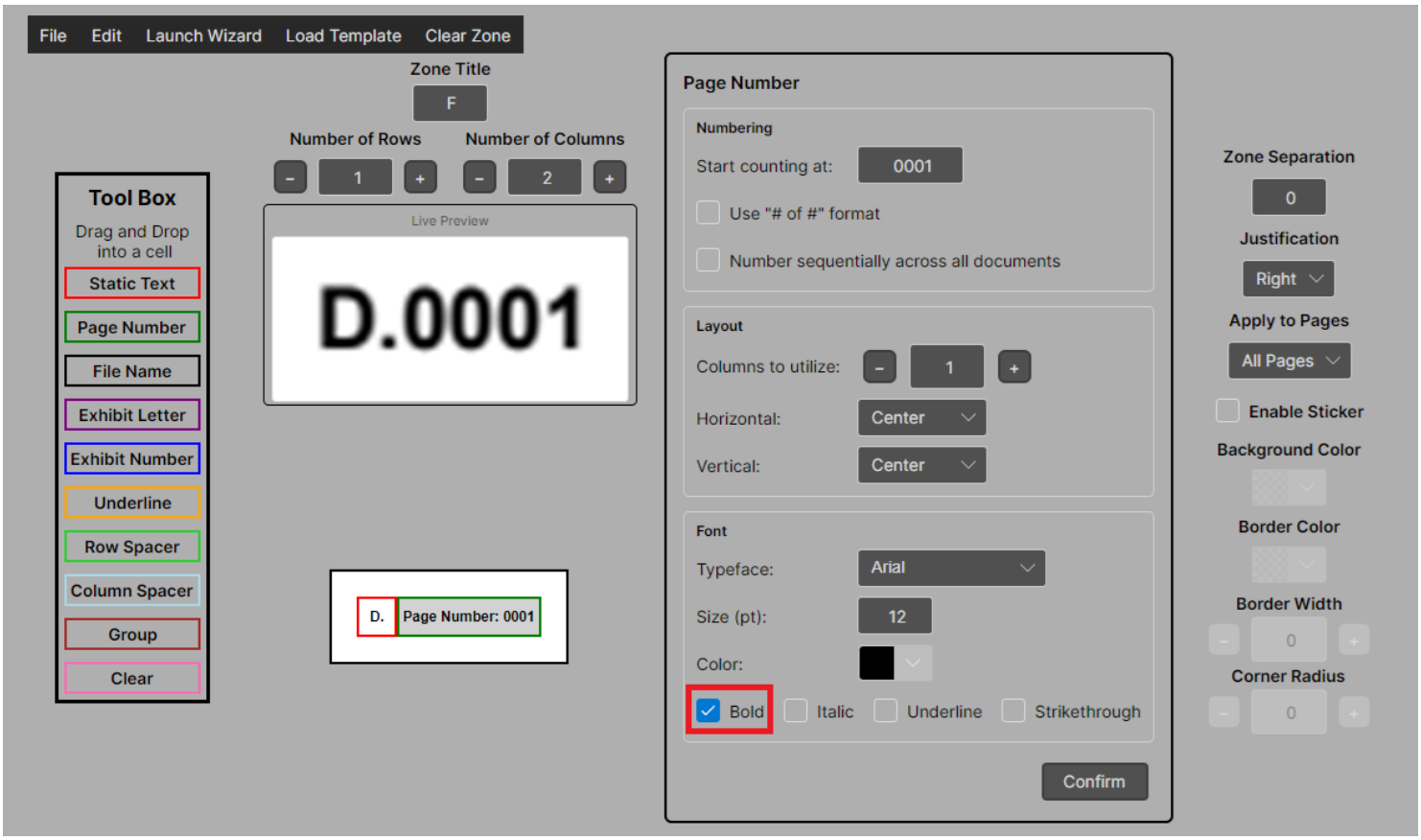
3. Click and drag a ***Static Text*** element from the tool box into the cell marked **1,1**. Do the same for a ***Page Number*** into cell **1,2**. You can also click on the empty cells and choose an element to insert from the click-menu.



4. Let's configure our ***Static Text*** element to read **"D."**. Click on the ***Static Text*** element that we just placed to launch its settings and update its content. We can also make the text bold:



5. Finally, let's click into the page number to make it bold as well. The other default page number settings are perfect for our task, so let's leave everything else as it is:



And we're done! You can click out of the grey pop-up designer box anywhere else on the interface and your Bates label will display on the main preview in the center of the screen. If you'd like, you can import some documents by dragging them into the left **Imports** pane and click **Go** to see the label applied to actual documents (see the following section for a workflow overview).

Mega-Bates Workflow

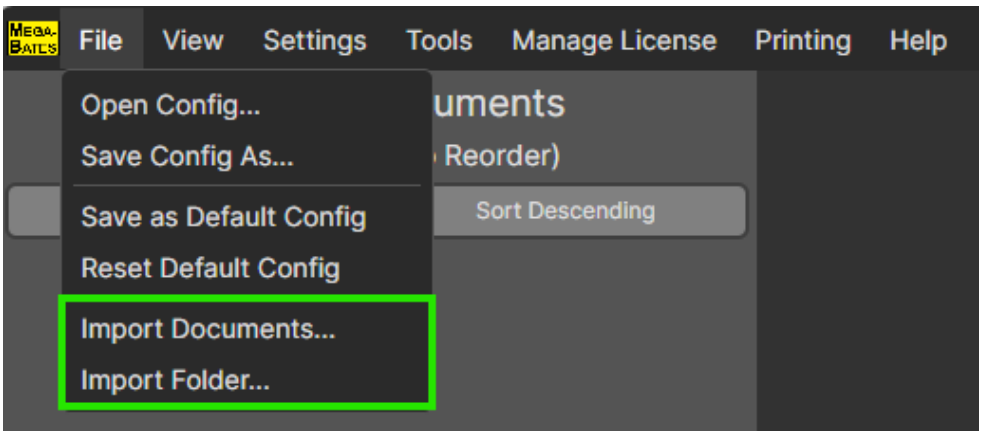
Mega-Bates works in 3 easy steps:

- Import your documents
- Design your data zones
- Export the final result

Step 1: Import Your Documents

The first thing you should do is import the documents you wish to add data to. You can do this 2 ways:

- File -> Import Documents/Folder



- Drag and Drop files/folders from your file explorer into the **Imported Documents** pane on the left side of the Mega-Bates UI

You can then drag and drop the imported files into the correct order or use the sort options, if needed.

Mega-Bates can handle PDFs, most image formats, and Microsoft Word and PowerPoint documents (if Microsoft Office is installed on your computer). If you're processing image files or Office documents, those will be converted to PDFs during processing. If some of your files have the same file name (likely due to them being from different folders) you can hover your mouse over the file in the import pane to get the full path the file was imported from.

Remember, the files that you "import" are not leaving your computer. All processing will take place locally on your computer and your documents never leave your custody.

Step 2: Define Your Data

Next, you can decide the layout of the 6 zones; either top, split, or bottom. You can then go through and add data to your zones in the form of Bates Labels, Exhibit Stickers, or other custom annotations. See the examples below for how to manually create **Exhibit Stickers**, **Bates Labels**, etc., how to load and create **Templates**, and how to use the **Zone Wizard**. **Templates** and the **Zone Wizard** are powerful ways to get up and processing quickly!

Step 3: Output Options and Export

Finally, you can select the output options you'd like to apply. This includes adding an extra margin for 3-hole punch paper, creating an index of the documents you're processing, formatting page sizes, OCR, merging, printing orders etc. Once your output settings are selected and the preview of your data looks good, you're ready to click Go on the bottom-right of the screen! You'll then be prompted for a destination folder to save the output to. Mega-Bates will create a subfolder within your selected destination folder named with the timestamp of the run. It will be within this timestamped subfolder that the results will be placed.

Examples

Here are a few examples! We'll go through how to create **Bates Labels**, **Exhibit Stickers**, and a few other **Custom Data** applications.

Bates Labels

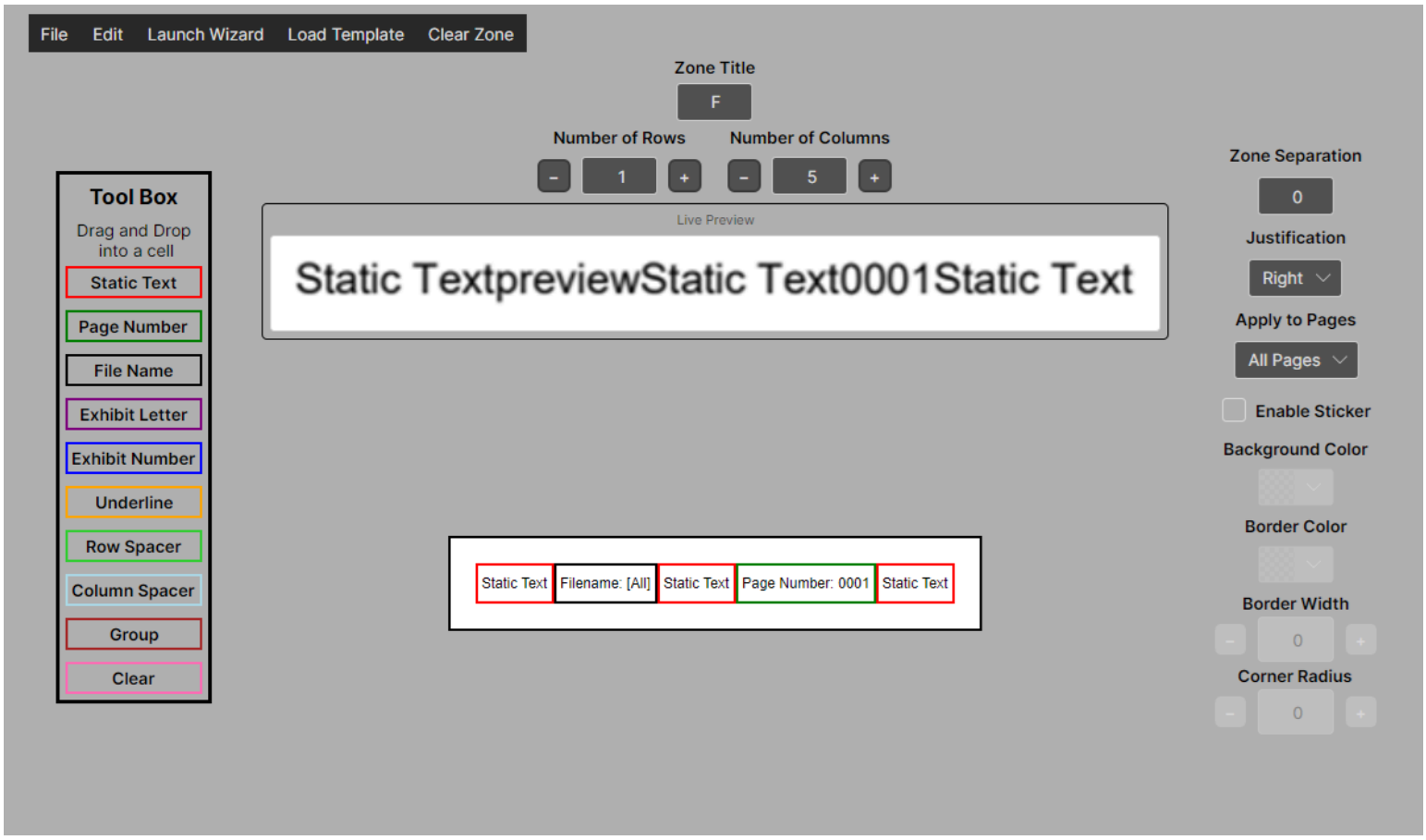
Bates labels consist of a single row, but can have many columns to contain all of the elements you need. In this example, we'll have a Bates label applied on the bottom-right of each page with the following components:

- Prefix + Separator
- The first 5 characters of the file name
- Separator
- Page number with 4 total digits, starting at 0001, using the "# of #" format
- Separator + Suffix

To handle these elements, we need 5 columns:

Static Text* | *File Name* | *Static Text* | *Page Number* | *Static Text

I've set my number of columns to 5, and dragged each of my tools to their corresponding cell within the design area.



Next, we'll click into each of our tools within the design area to set them up to our requirements. I want the final product to look like this (with the prefix and suffix literally reading "Prefix" and "Suffix" for this example):

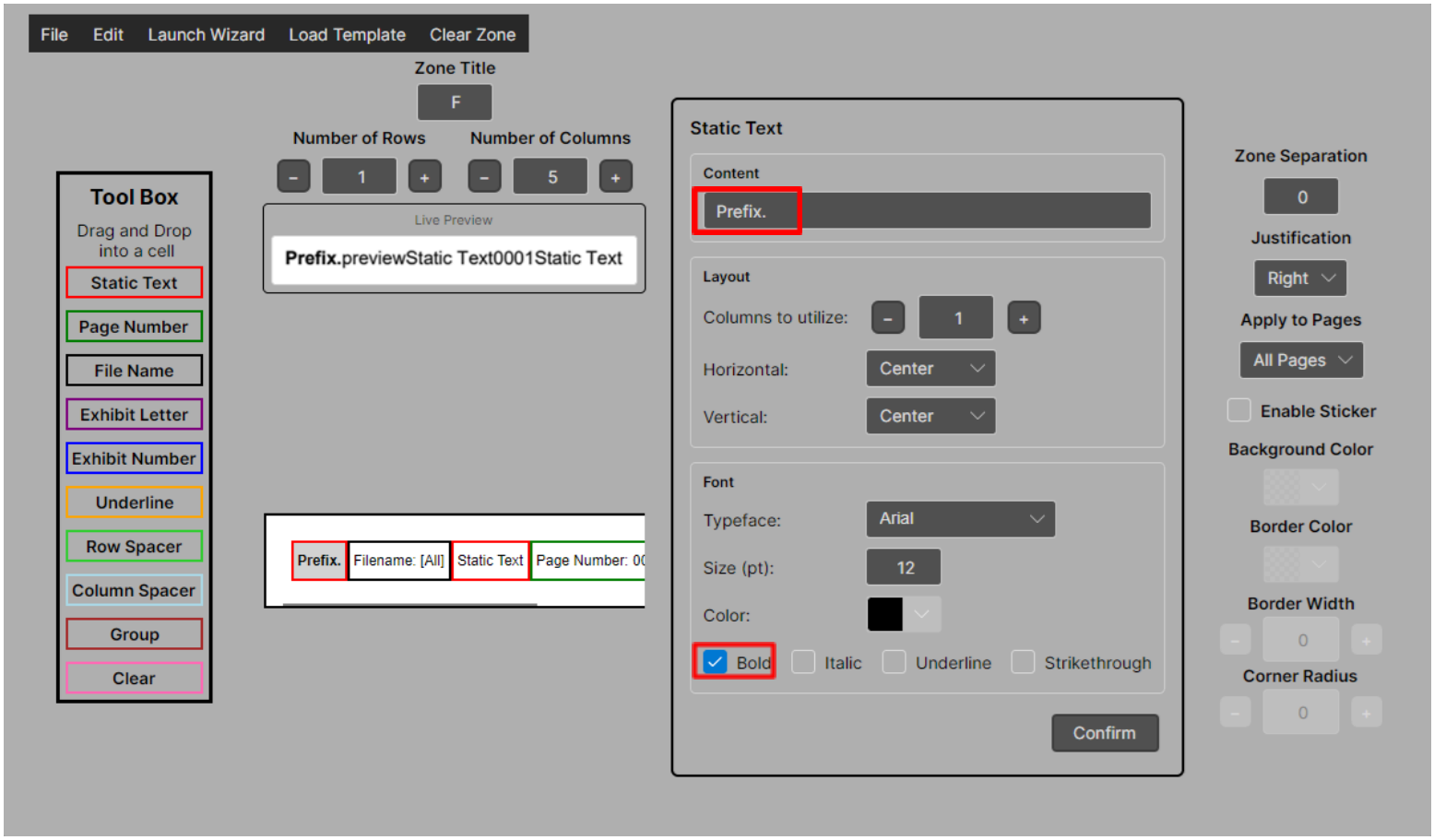
Prefix Page Number
| |
Prefix.ABCDE.0001 of 9999.Suffix
| |
First 5 characters of file name Suffix

(The colors above match the tools' bounding boxes within the designer for easy identification. We'll insert them in black, although it's entirely possible to define separate colors for each tool within their font settings if that's your requirement)

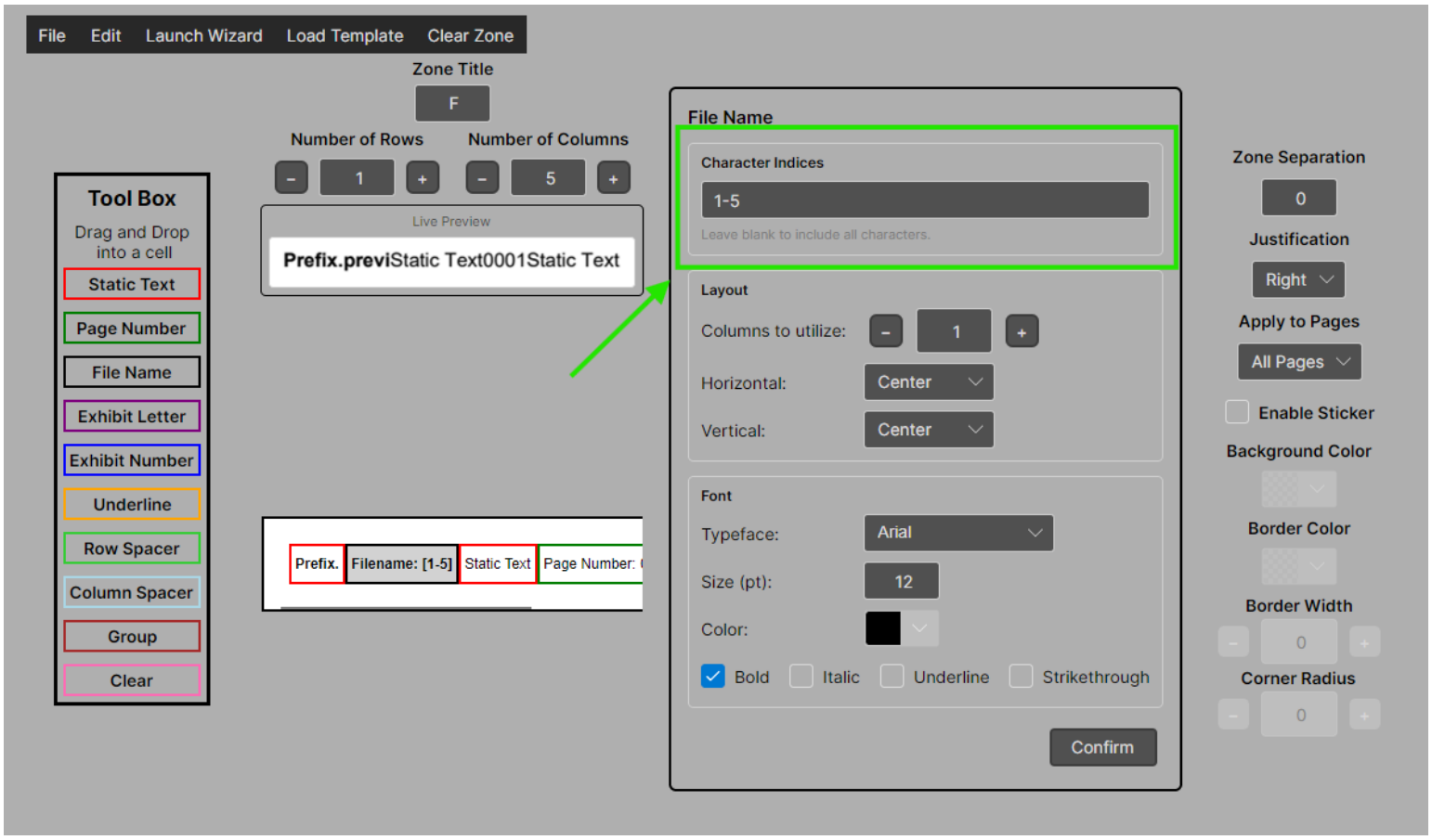
Take note of the extra period between the ***File Name*** characters and ***Page Number***. This is accomplished with an additional ***Static Text***. The periods after and before the prefix and suffix respectively can be included within those elements themselves.

We also will **bold** the Bates label in this example.

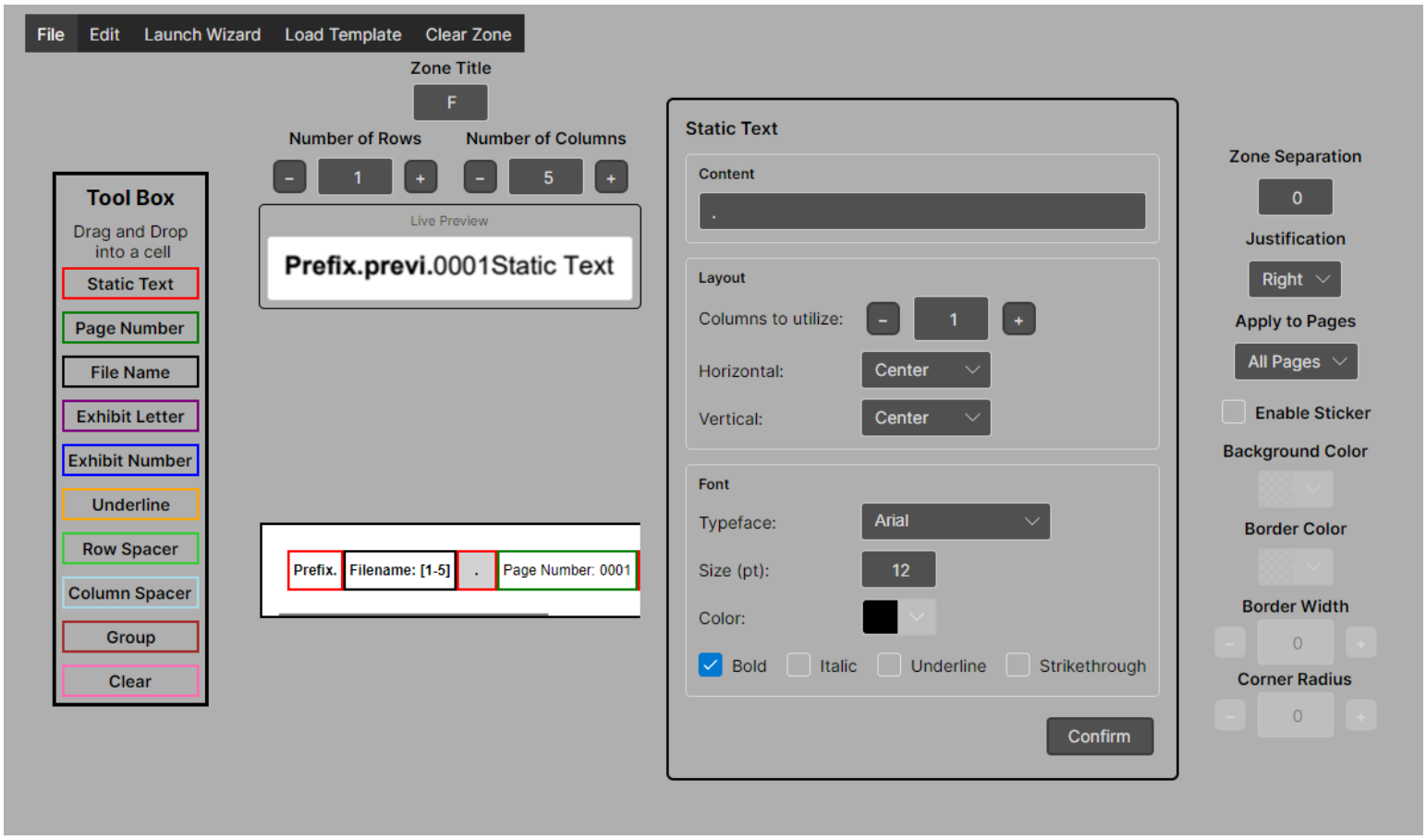
***Static Text* 1** - Should simply read "**Prefix.**", remember to include the period separator and to select **bold**.



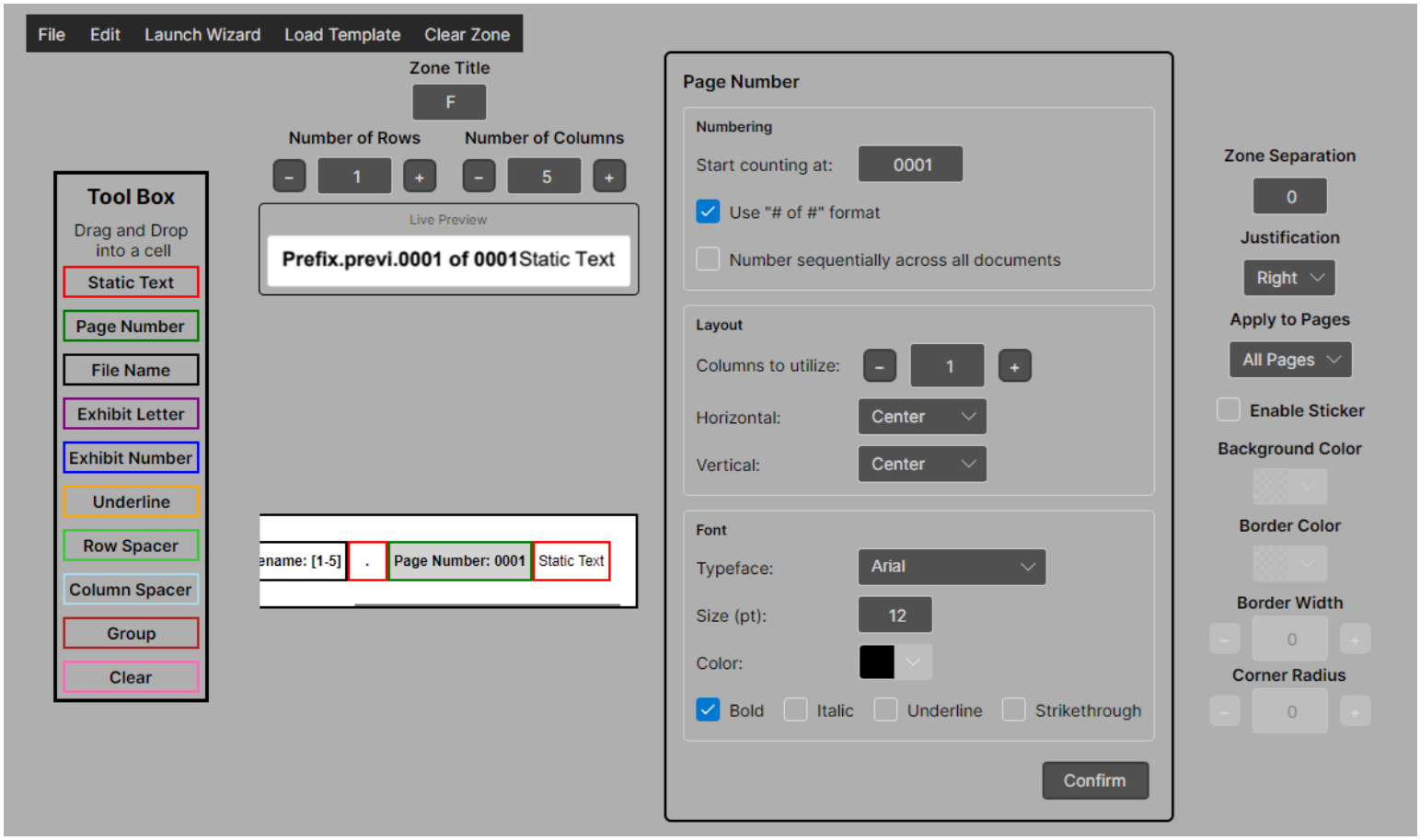
File Name - Characters 1-5 (You can also include multiple ranges & indices in this text box depending on your needs, i.e. 1,3-5,2,6-10)



Static Text 2 - This is our period separator



Page Number - This should start incrementing at 0001, have 4 digits in total, and use the “# of #” format

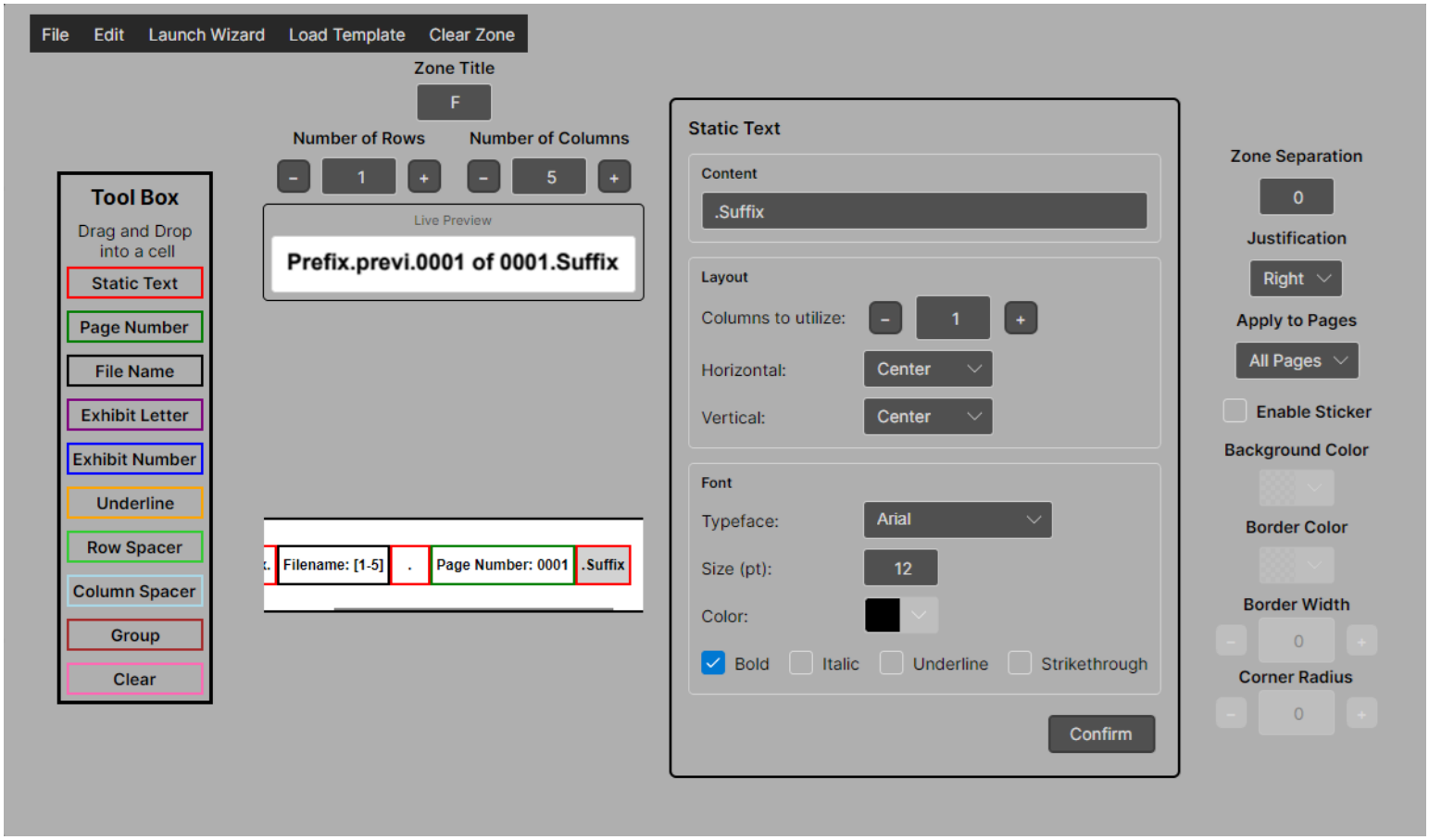


Quick note: If you’re creating a Bates label for use during discovery, you may want to select the “**Number sequentially across all documents**” option. This will continue numbering from where the previous document left off. For example, if you have 3 documents each with 10 pages:

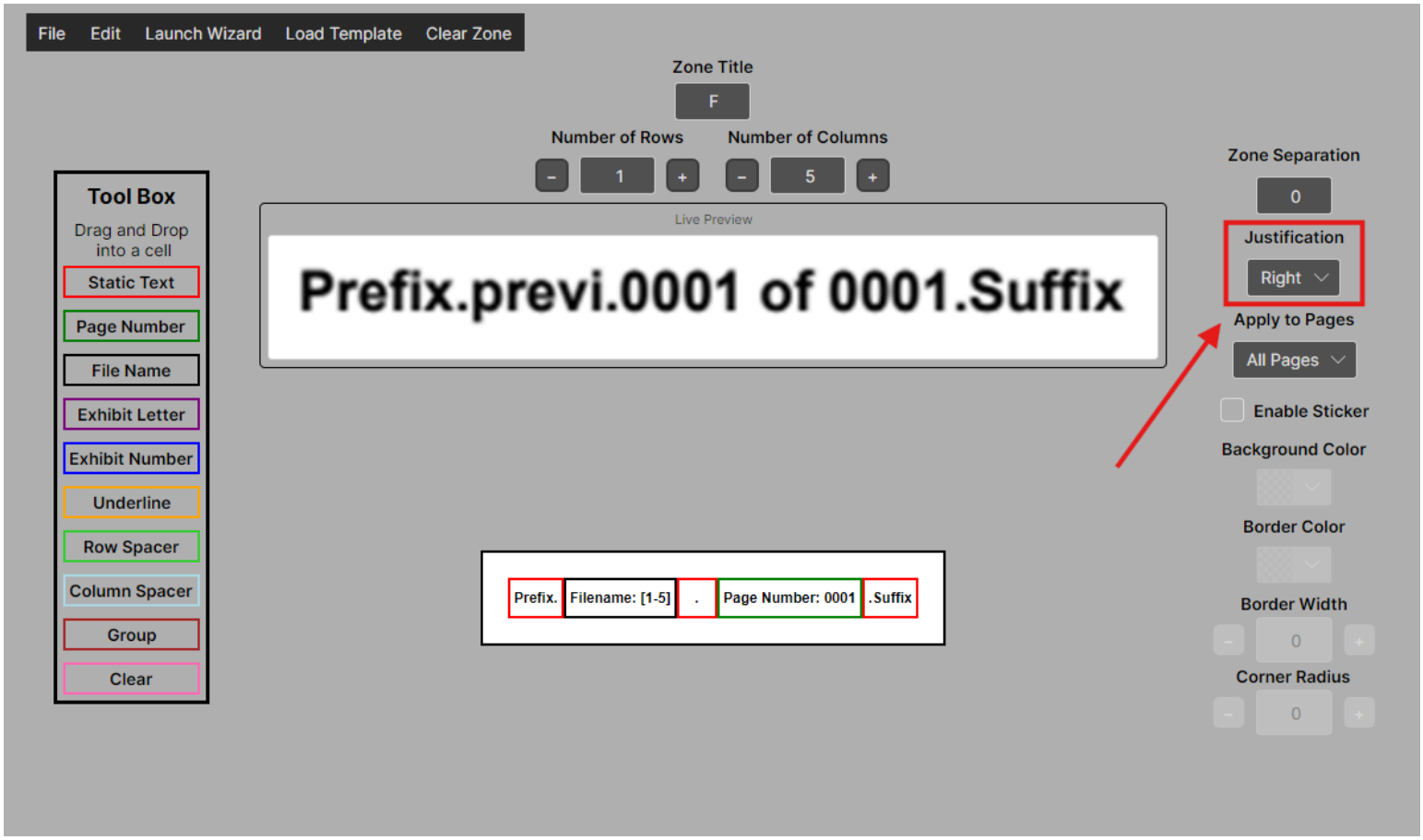
Document 1 will get 0001-0010
Document 2 will get 0011-0020
Document 3 will get 0021-0030

This will also be reflected in the generated index if you choose to create one with this Bates label zone selected as an index zone in the output options.

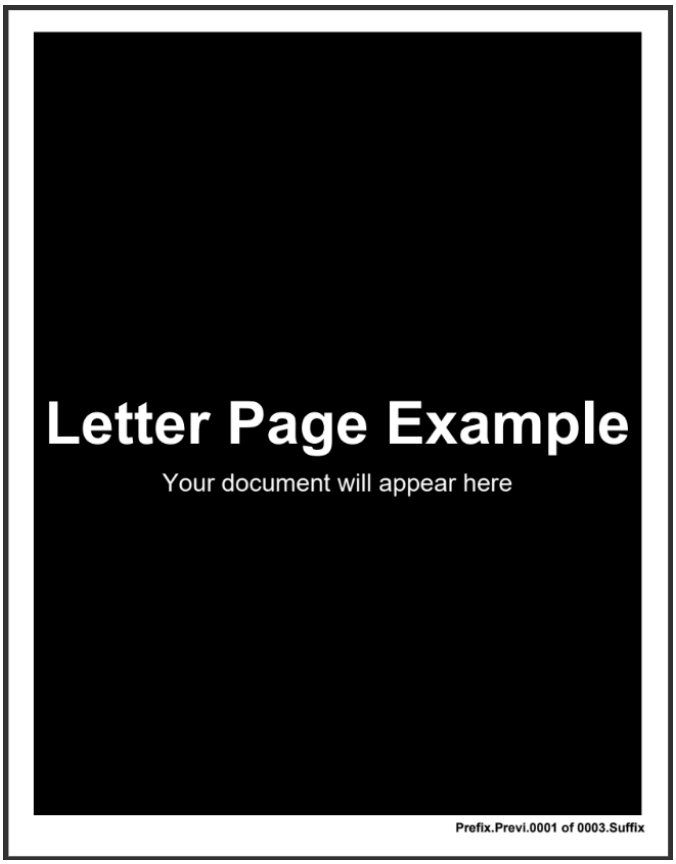
***Static Text* 3** - This should simply read "**.Suffix**"



Finally, let's make sure our zone settings are configured the way we need. I wanted this Bates label to be in the bottom-right corner of my pages, so I've created this Bates label in zone F with either Split or Bottom set as my zone placement, **right-justified** the zone.



After right-justifying the zone, we're done! Make sure the live preview is exactly as you'd like the data to appear in your document. You can now click on any other part of the user interface to dismiss the zone designer window. The full preview should now reflect all of your hard work!



Feel free to click through the 3 pages of the preview to see how the ***Page Number*** auto-increments. The default preview document used within Mega-Bates has a name of "**Preview All Sizes**" behind the scenes, which is why we're seeing "**Preview Al**" inserted for our file name in the preview window. A quick reminder that the actual characters from each of your documents' names will be inserted here, not the default file name of the example document.

Bonus: If you think you may need to use your Bates label configuration in the future, whether it be as-is or as a starting point for future projects, you can save the zone to a file and re-import it later via the zone's File menu!

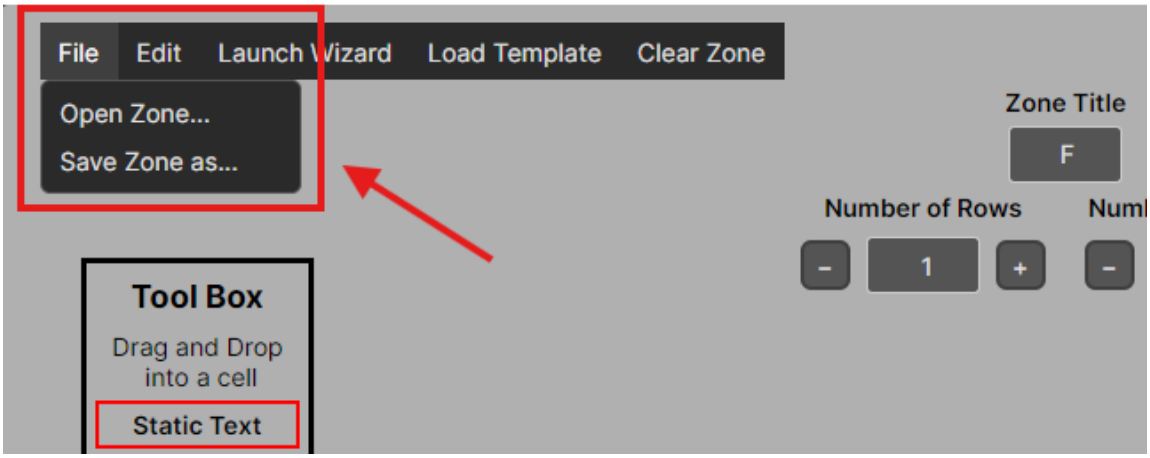


Exhibit Stickers

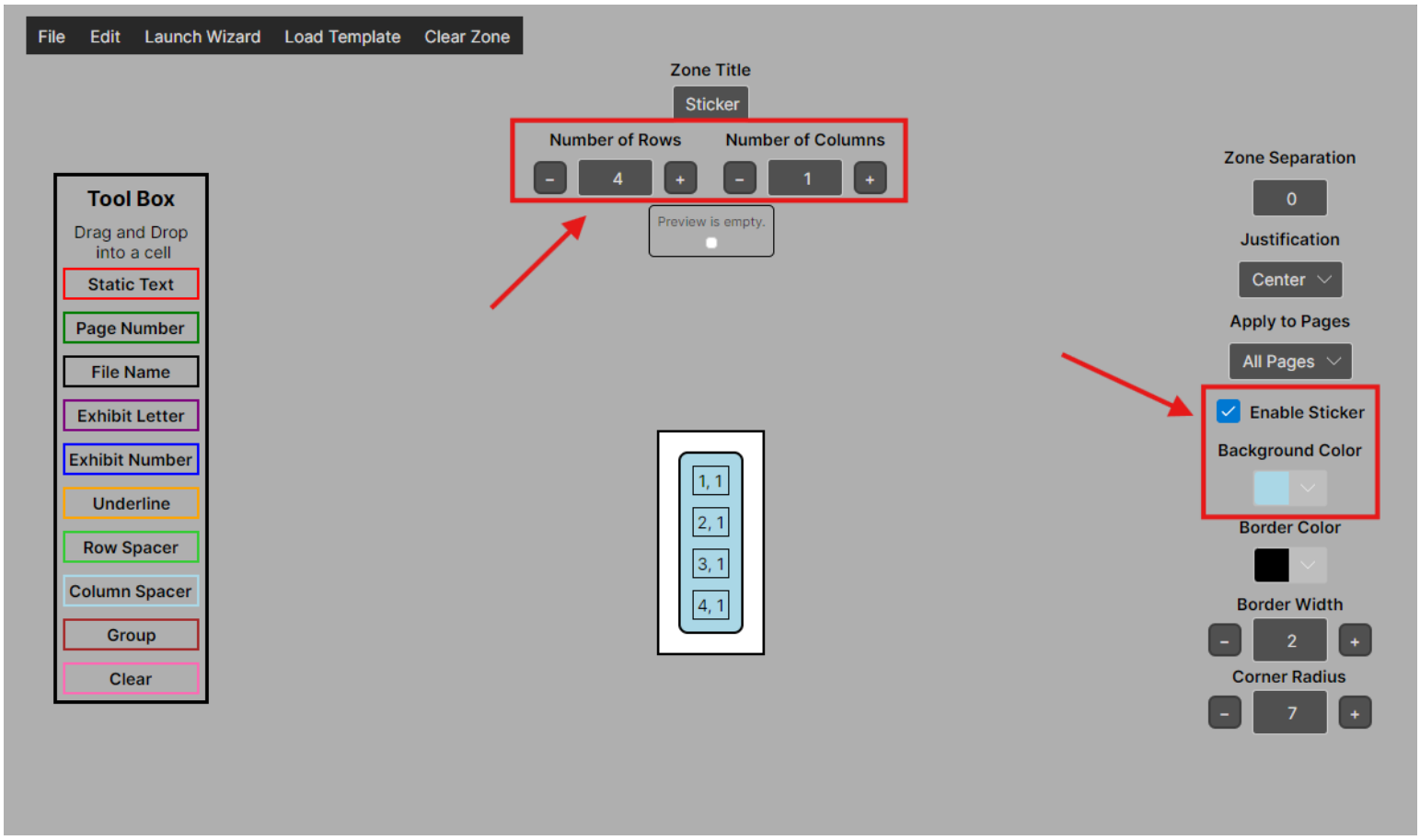
Building off of what we learned in the Bates label example, let's create a simple exhibit sticker. This takes us into the second dimension by having multiple rows.

Let's create this sticker within Mega-Bates:

Things to think about when designing a sticker:

- Background Color - Light Blue
- Border Color - Black
- Number of Rows - 4
- Number of Columns - 1? We'll come back to this **
- Tools needed - Looks like there are ***Static Texts***, an ***Exhibit Number***, and an ***Underline***

Let's get our designer set up. We'll start with a 4 row by 1 column grid, and enable the sticker mode in the Zone Settings. We'll also change the sticker color to a light blue:

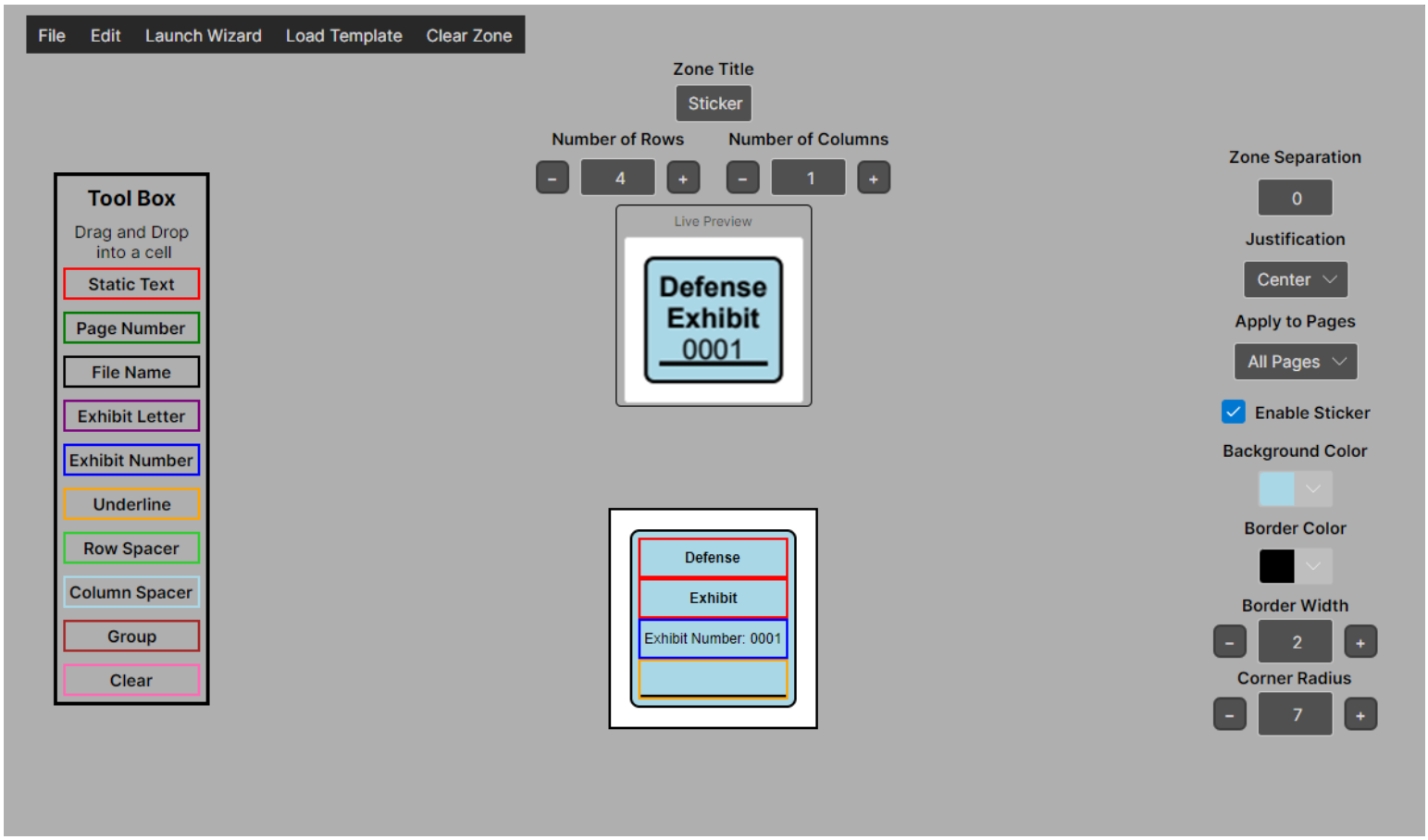


Next, let's add our tools. At first glance, the structure should be:

Static Text
Static Text
Exhibit Number
Underline

Quick note: When referring to an ***Underline*** above, we're referring to the ***Underline*** tool. You could just choose to underline the text of the ***Exhibit Number*** in its font settings, but that underline will always be specific to the text of the ***Exhibit Number***, rather than spanning farther left and right like our example has, or having the ability to add extra space between the text and the underline itself. If your requirements allow just to underline the text, that's ultimately easier.

Let's get those 4 tools added to the Design Area, complete with filling out their details similar to how we did for the Bates label:



Now, let's take a look at the current state of the sticker as actually applied in our preview:

Not bad!

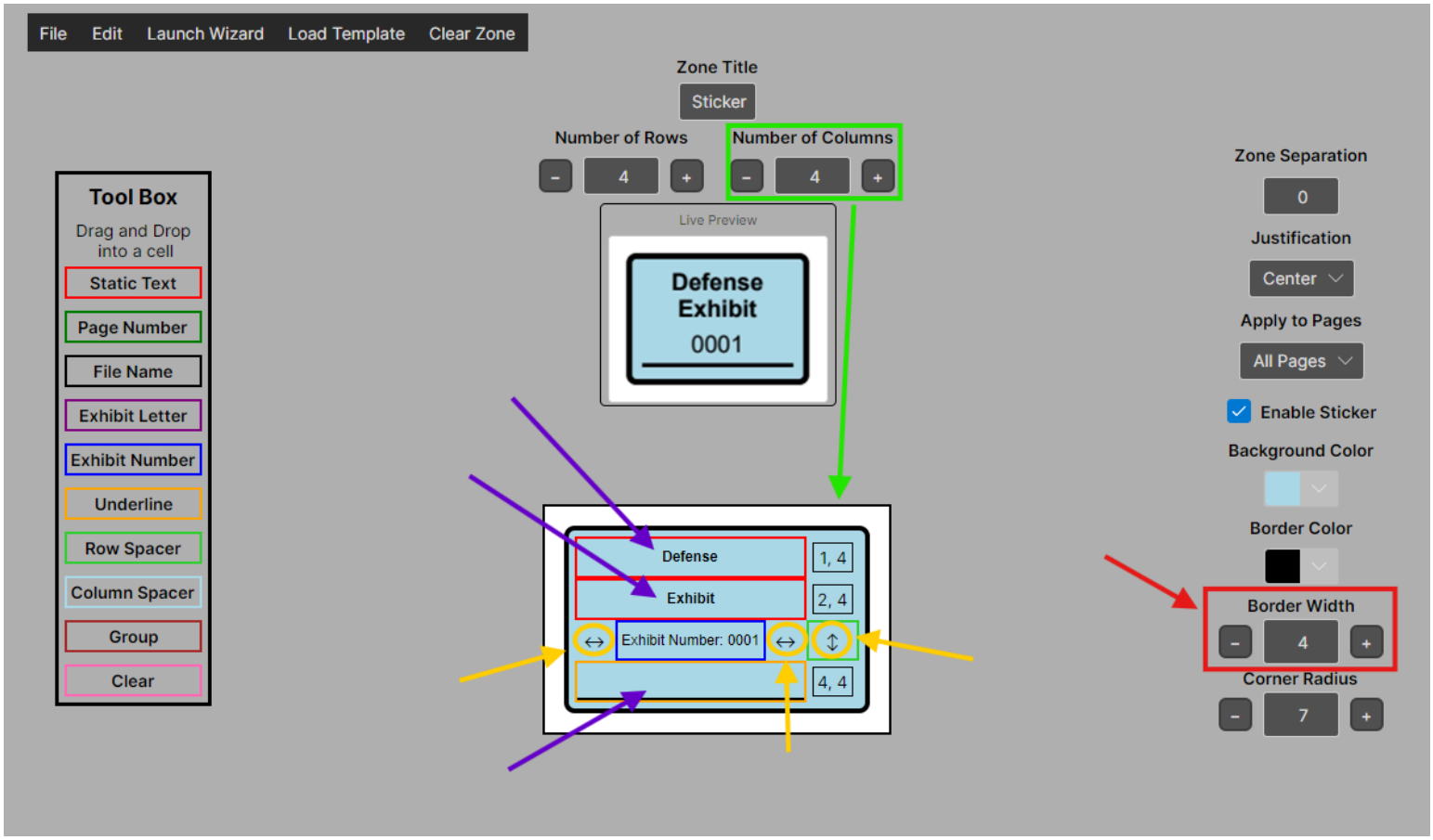
If this appearance is suitable for your needs, you're good to go! However, there are some further tweaks we can make to get it looking exactly like our target.

Original target

Let's make a few observations:

- The border is thicker in the original target
- There is more space between The "Exhibit" ***Static Text*** and the ***Exhibit Number*** in the original target
- There is more space between the ***Exhibit Number*** and the ***Underline*** in the original target
- The ***Underline*** seems to be longer in the original target, and by extension, the sticker itself

Let's see a design that produces an exact match:



What do we notice has changed in this new-and-improved design? (The colors below correspond with the arrows above)

- We've increased the border width from 2 to 4
- ** The number of columns is now 4
- The ***Static Texts*** and ***Underline*** now span 3 columns
- We see some ***Row*** and ***Column Spacers*** have been added

Let's take these changes one by one and discuss why they were made.

We've increased the border width from 2 to 4

This makes the border more pronounced to match the target and resolves our first bullet point from our observations:

- *The border is thicker in the original target*

** The number of columns is now 4

This gives us extra cells to add our spacer tools to force the layout of the sticker to match our requirements.

The ***Static Texts*** and ***Underline*** now span 3 columns

But importantly, the ***Exhibit Number*** is still in the 2nd column and doesn't span any additional columns… *

We see some ***Row*** and ***Column Spacers*** have been added

These ***Row*** and ***Column Spacers*** force the layout of our sticker to perfectly match our requirements.

The ***Row Spacer*** in cell (3, 4) (right-most cell in the 3rd row) fixes 2 of the bullet points from our observations:

- *There is more space between The "Exhibit"* ***Static Text*** *and the* ***Exhibit Number*** *in the original target*
- *There is more space between the* ***Exhibit Number*** *and the* ***Underline*** *in the original target*

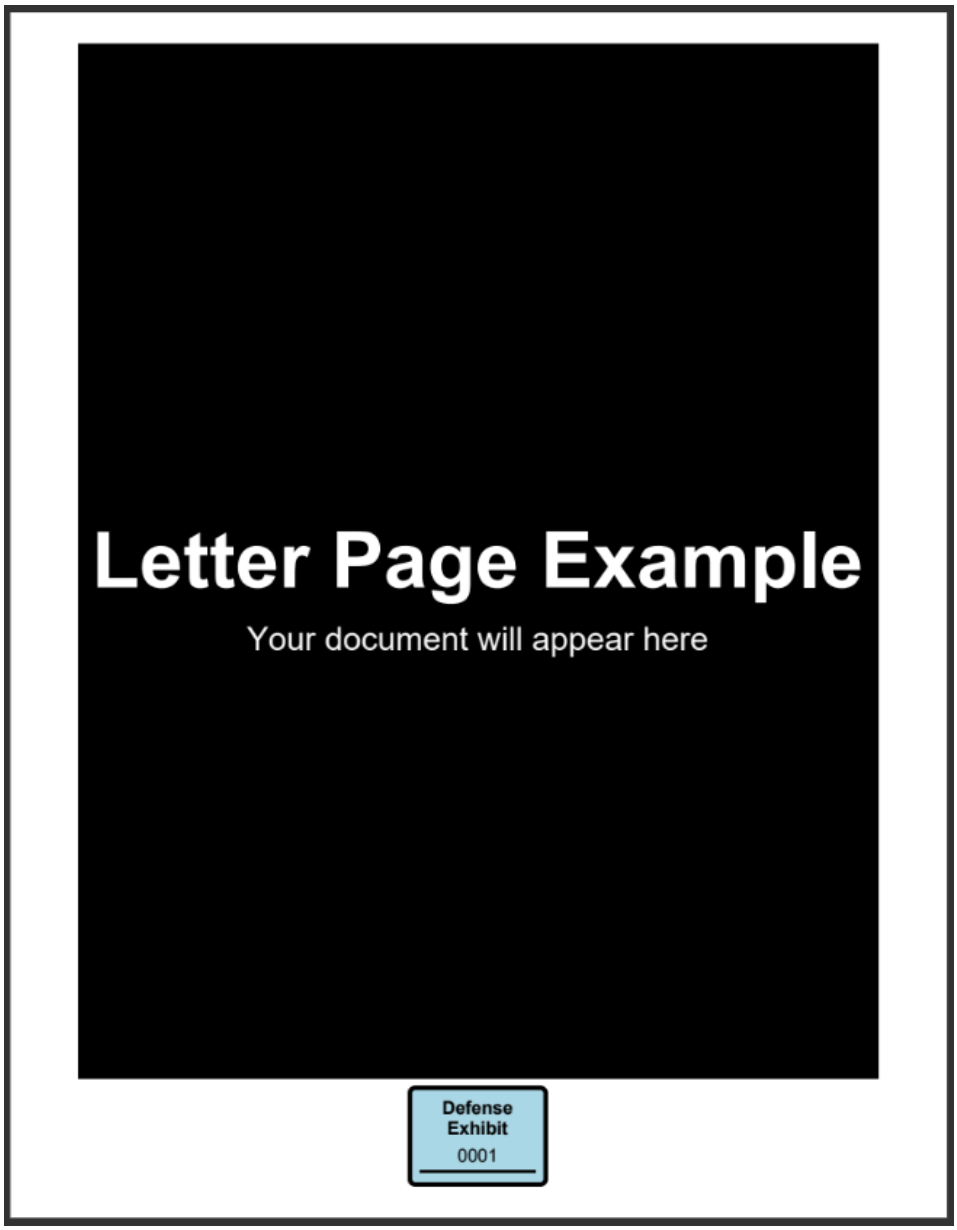
* The ***Column Spacers*** in cells (3, 1) and (3, 3) widen the space before and after the ***Exhibit Number*** to add extra width to the sticker as a whole. By adding space both to the left and to the right of the ***Exhibit Number***, we ensure that the ***Exhibit Number*** itself remains centered.

In this example, the widths of the ***Column Spacers*** are both 25, while the height of the ***Row Spacer*** is 30.
By adding these ***Column Spacers*** and making the ***Underline*** span 3 columns, we resolve the final bullet point:

- *The* ***Underline*** *seems to be longer in the original target, and by extension, the sticker itself*

Quick note on spacers… you may have noticed that the ***Row Spacer*** in cell (3, 4) is in its own column. Not to worry! That extra column will not affect how the sticker is applied to the document. The same can be said about ***Column Spacers*** and any rows they inhabit. You can think of ***Row Spacers*** as having a width of 0, meaning that extra column will have width 0 (and essentially won't be present). The same can be applied to ***Column Spacers*** and their height.

Let's take a look at the results of our hard work!

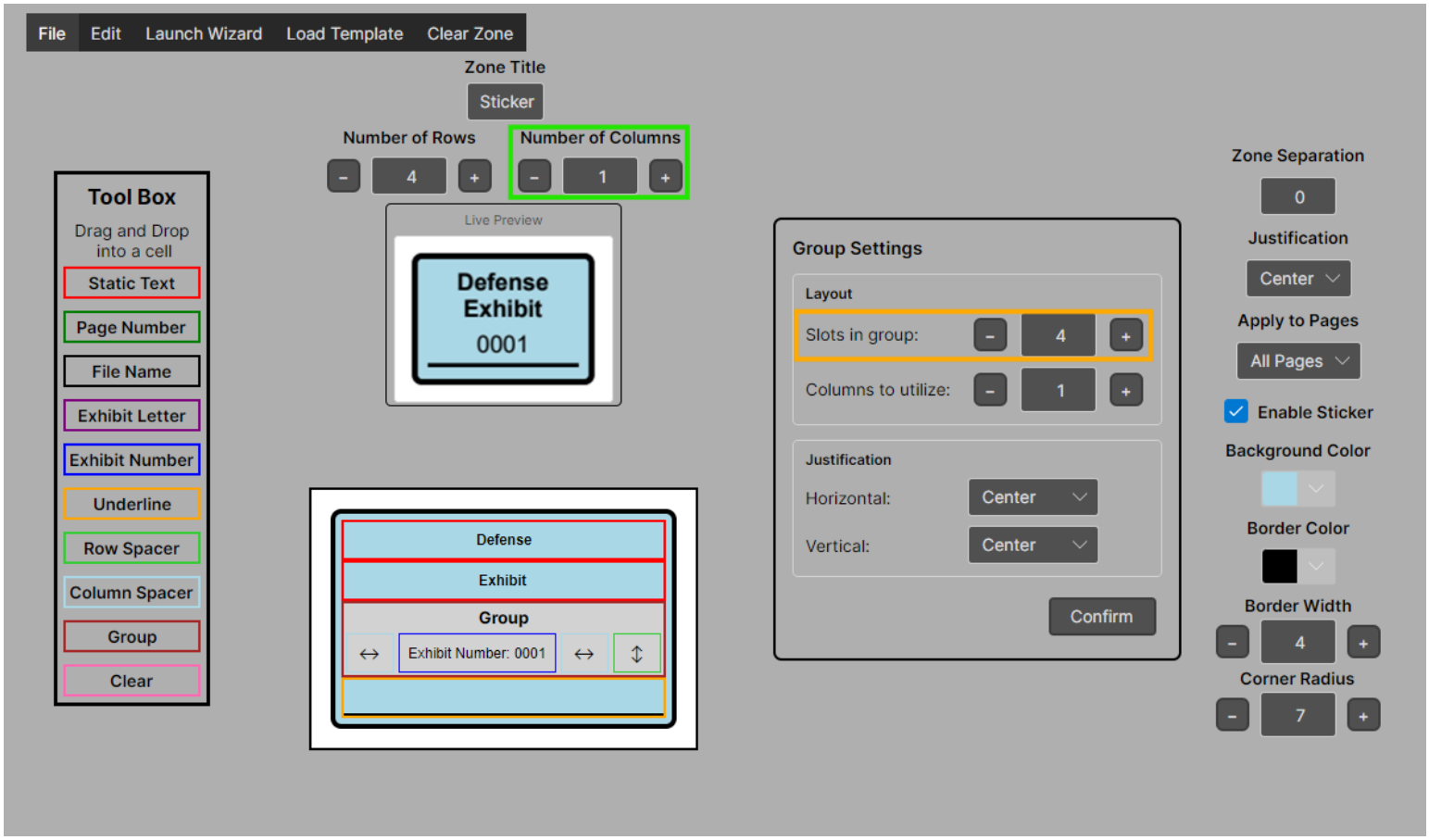


Nice!

In this example, I've placed the sticker in zone E with the zone placement set to either Split or Bottom. I've also applied the sticker to all pages of my documents. **Remember, you have the option to limit the application of a zone to the first page only (as well as many other options) if needed via the Zone settings.**

Remember: You can save your zone to a file for future use via the zone File menu!

As a bonus exercise, we can also accomplish the same result using the ***Group*** data type! The benefit of ***Groups*** is that we don't need to adjust the column spans of the other rows' elements.

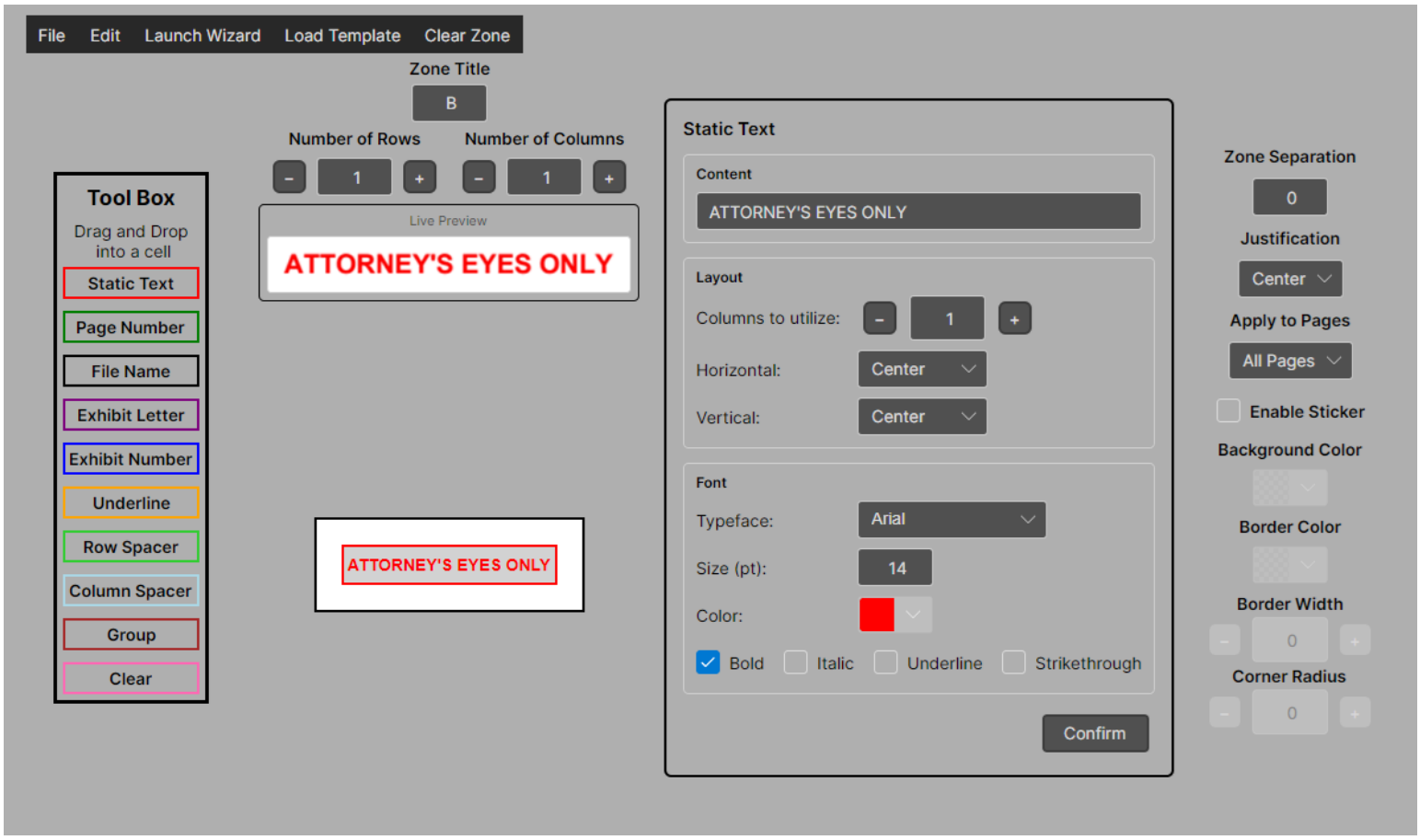


In the above example, we see that the number of columns remains 1 and we simply have a ***Group*** with 4 slots to contain our spacers and ***Exhibit Number***. After increasing the slots in the ***Group***, you can drag and drop tools into the ***Group*** itself to add them, just like you would normally.

Custom Data

Here are just a few extra ideas of what you can add within the zones. Remember that all text that you add can be fully customized, including font styles, sizes, and colors.

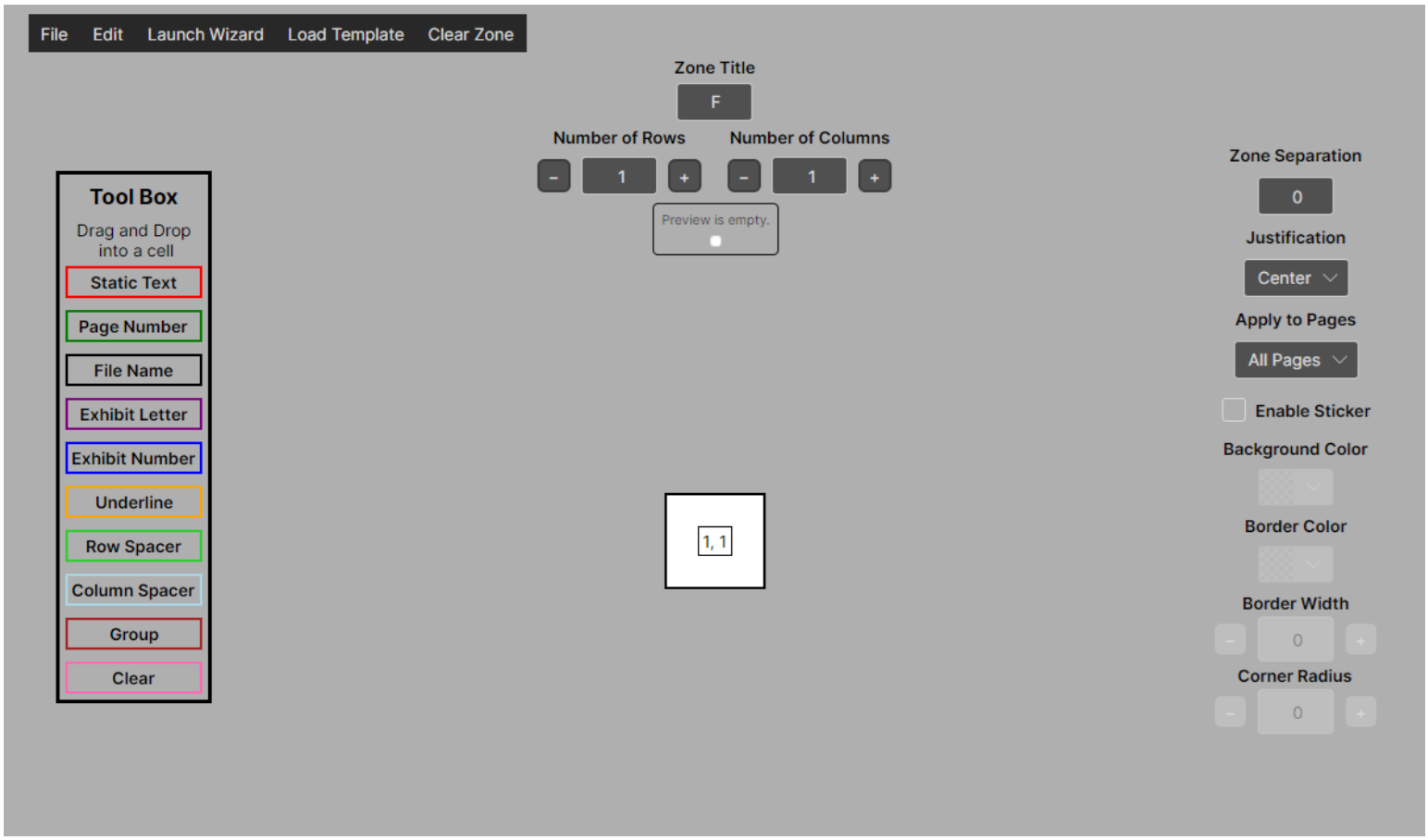
Example for applying “ATTORNEY’S EYES ONLY” (“CONFIDENTIAL”, “PROPRIETARY”, “PRIVILEGED”, etc.)



This is just a single ***Static Text*** field centered in Zone B with either Top or Split zone placement.

Whether it be important markings like the above example, document descriptions and summaries, or other notes and data, the possibilities are endless!

Detailed Zone Designer Overview



The Zone Designer consists of a few different sections:

- **Toolbox**
  - This is where all of the data tools live. You can drag and drop one into a cell within the **Design Area**.
- **Design Area**
  - This is the grid where you define the structure of the data you'd like to insert. It consists of rows and columns and functions similar to a spreadsheet table. The number of rows and columns can be adjusted via the Rows and Columns text boxes towards the top of the designer. You can also right-click on a cell that is already present in the grid to insert & remove a row/column. If you'd like, you can also customize the zone title. Zone titles have no impact on the data that's inserted into the document but can be helpful by reminding you what data should go where during your planning. Above the design grid is a live preview that shows what the final product will look like as applied to your documents..
- **Tool Settings**
  - When you drag and drop a data tool into a cell within the design area, the tool's settings will pop up. This is where you can define what/how you want your data to display. (This is not currently visible in the above screenshot, but will appear to the right of the **Design Area** when you start adding data tools)
- **Zone Settings**
  - This is the group of settings on the right-most side of the designer that applies to the zone as a whole.
    - **Zone Separation** - This is a slight manual adjustment option that will apply padding between the current zone and its neighbor. Say, for example, you have something in Zone A that is right justified and something in Zone B that is left justified. Zone separation will add space between the data in A and B to keep them from touching each other at the zone border. Usually a value of 2-5 is sufficient. You can add a little in both zones A and B if you'd like them to space out away from the zone border symmetrically. This only applies to the left and right borders of a zone. The top and bottom borders get a small padding automatically.

        - **Justification** - This is the justification that the current zone will apply. This is always relative to the zone, not the page itself. Each zone's alignment is based off of ⅓ of the page. A & D are in the first ⅓, B & E are in the second ⅓, and C & F are in the third.
        - **Apply to Pages** - This is where you can define the pages on which you'd like to include the zone. By default, the zone will be included on all pages, but you also have the option to include on only the:
            - First Page
            - Last Page
            - Odd Pages
            - Even Pages
            - Custom Range - This allows you to define specific pages and page ranges, similar to selecting what pages to print out of a document when interacting with a print dialog.
        - **Enable Sticker** - This will activate the sticker background and the associated settings. Any type of data can be turned into a sticker by activating this option. You have options to customize the background and border colors, as well as the border thickness and the radius of the border's corners. Essentially, the higher the radius, the rounder the corners are. A corner radius of 0 will give a rectangular sticker with sharp, right angle corners.
- **Zone Designer Menus**
    - File
        - Open or Save a zone .megaz config file. Allows you to save a zone for future use.
    - Edit
        - Undo (ctrl+z)/Redo (ctrl+y or ctrl+shift+z) options
    - Launch Wizard
        - Opens the zone wizard that can assist in creating simple data to import into zones, without the need to drag and drop tools into the designer manually.
    - Load Template
        - Launches the template menu window with a selection of pre-built options, including common stickers, Bates labels, or other markings such as "Confidential" or "Attorney's Eyes Only". You have the ability to create your own templates as well, which will be populated here along with the pre-included options.
    - Clear Zone
        - Wipes any changes applied to the zone.

Detailed Data Types Overview

There are lots of different types of data you can include in your zones, including:

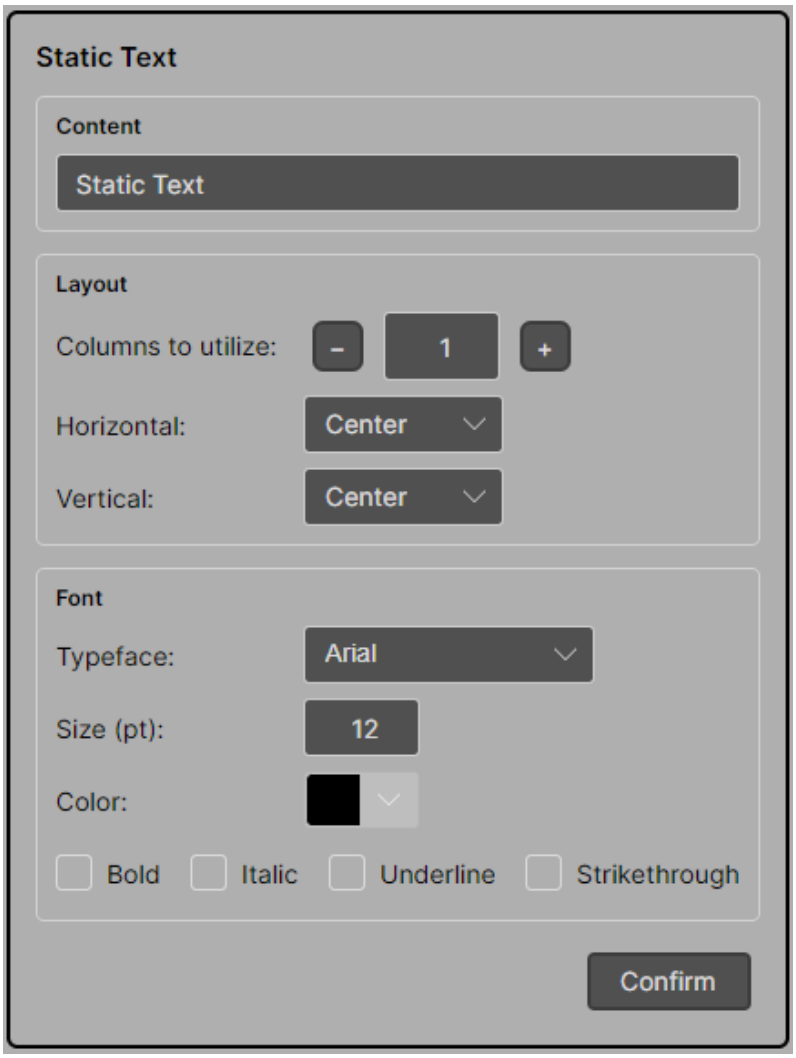
- ***Static Text*** - Text that doesn't change page to page or document to document
- ***Page Numbers*** - Number that automatically increments every page
- ***Exhibit Numbers*** - Number that automatically increments every document
- ***Exhibit Letters*** - Letter string that automatically increments every document
- ***File Names*** - String of characters from the document's filename (either full name or a subset of characters)
- ***Underlines*** - An automatically sized underline
- ***Row Spacers*** - Row size tweaker
- ***Column Spacers*** - Column size treaker
- ***Groups*** - Groups together other data types into a single structure to maintain their relative alignment

Let's go through them one by one…

Static Text

Static Text is simply a string of characters that is set in stone; nothing changes across pages or documents. This is perfect for adding "CONFIDENTIAL" or "ATTORNEY'S EYES ONLY" by itself, or as a prefix, suffix, separator, or other text within a more complex structure like a Bates Label or Exhibit Sticker.

Here are the tool settings for a ***Static Text*** element.You'll see this once you've dragged and dropped a ***Static Text*** element into a cell in the designer.



The Content text box is where you type the text you want to apply.

The Column Utilization text box is where you enter the number of columns you want the element to span.

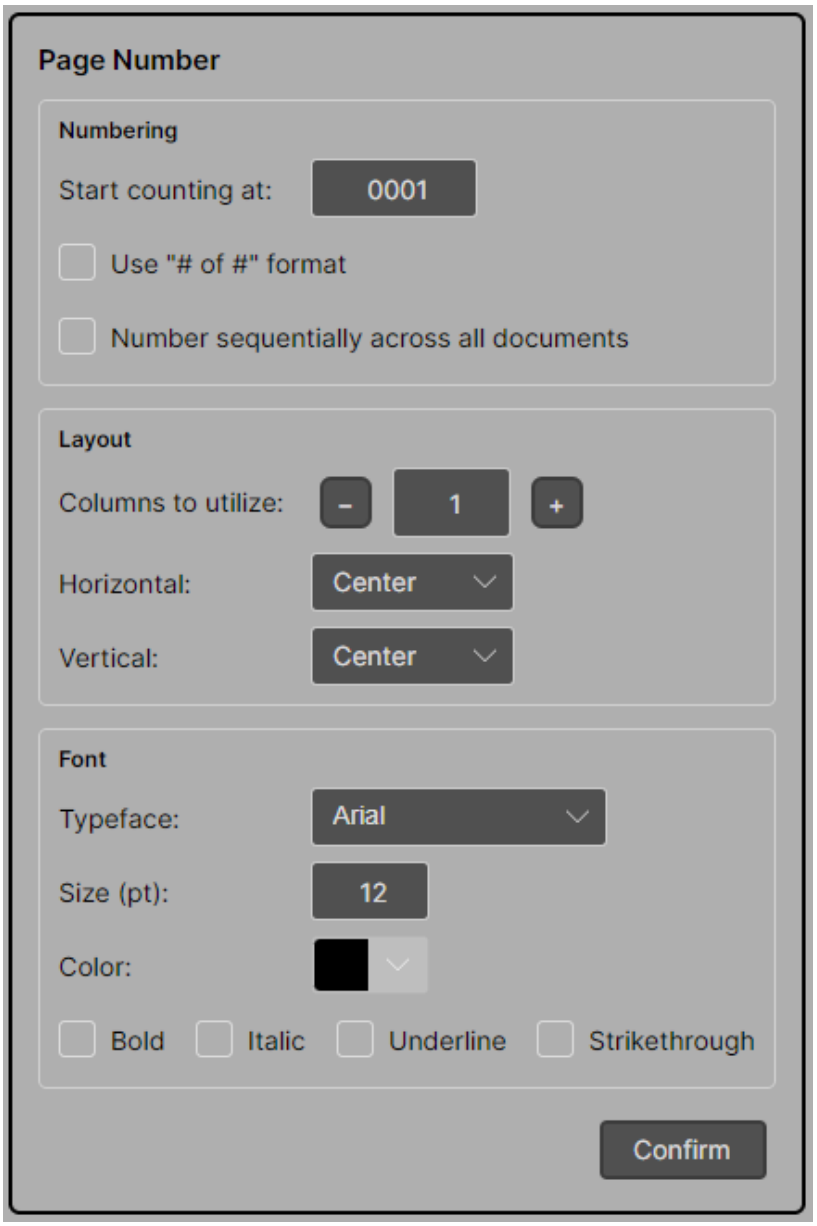
Here you can control both the horizontal and vertical justifications of the ***Static Text*** within its row and column.

Standard font options for all types of data.

Press confirm once you're happy with your entries to dismiss the options.

Page Numbers

A ***Page Number*** element auto-increments for each page, as the name suggests. It also has two other settings, as we'll explore through the designer options:



This first text box controls where the ***Page Number*** will start counting at, as well as the number of digits that will be included - padded with 0's until the desired length is reached. This example starts counting at 1 and will be 4 digits in length.

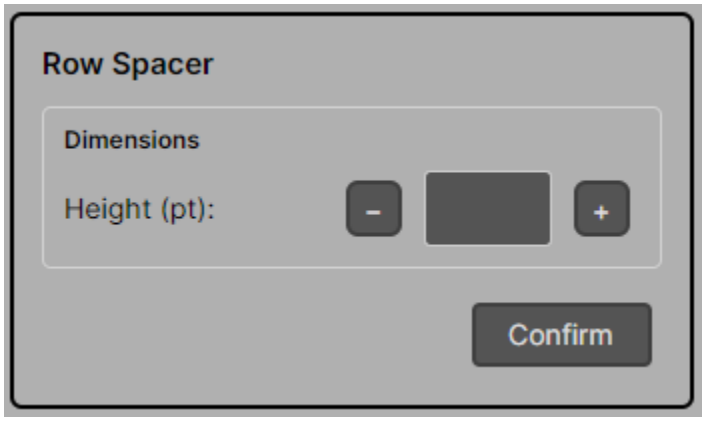
I.e. 0001 of 0004

This option will allow the ***Page Number*** to number across all imported documents. Say you had 10 documents with 10 pages each and started at 0001. The first document would get 0001 through 0010, the second would get 0011 - 0020, and so on.

The column utilization, justification and font settings are identical to previous examples.

Row Spacers

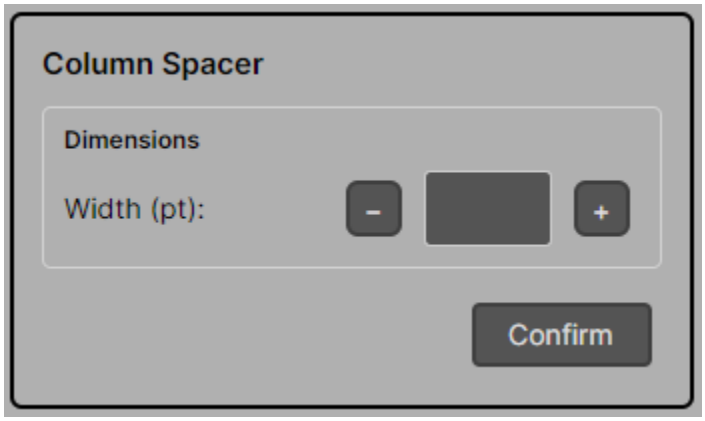
A ***Row Spacer*** allows you to simply expand a row to a specific size. No data will be inserted with this tool.



The only needed information is the height of the ***Row Spacer***.

Column Spacers

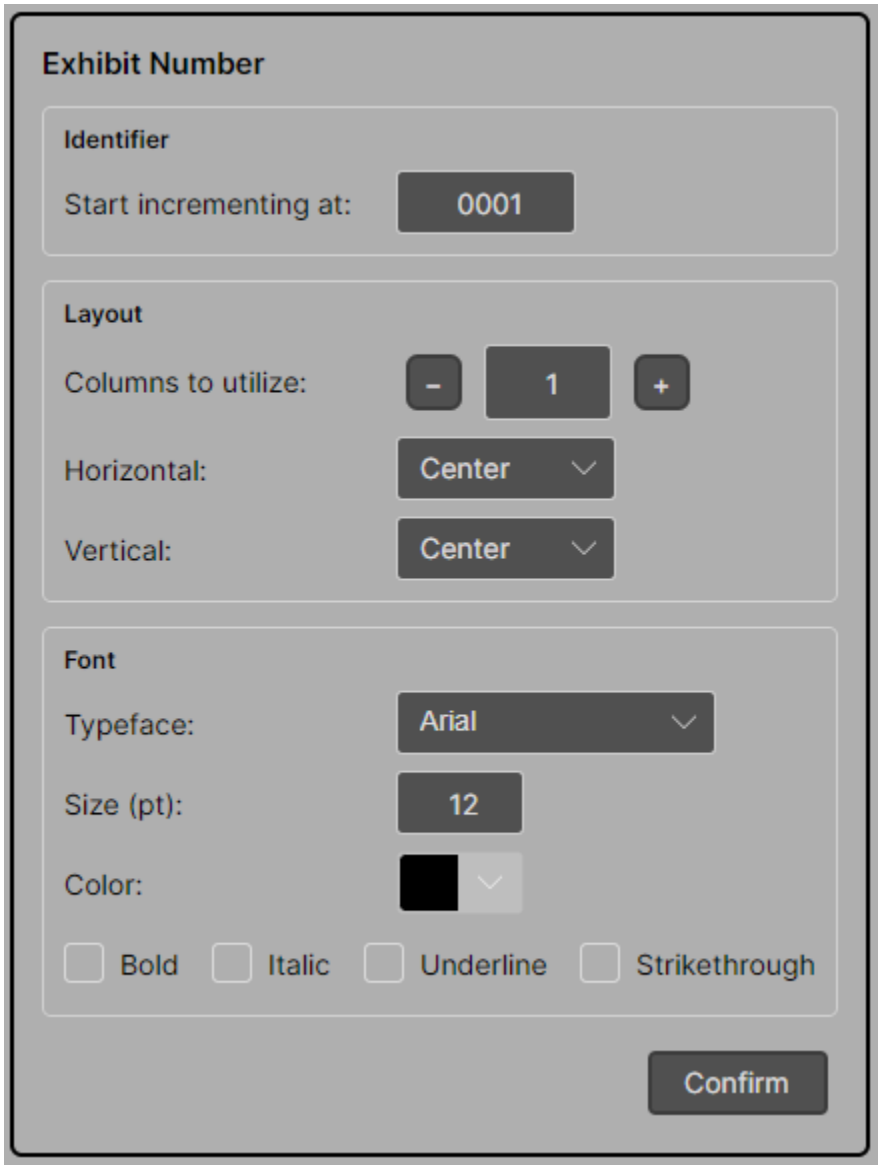
Similar to a ***Row Spacer***, just affecting the column. No data will be inserted with this tool.



The only needed information is the width of the ***Column Spacer***.

Exhibit Numbers

Exhibit Numbers are very similar to ***Page Numbers*** except that they increment once every document, instead of for every page. If you insert an ***Exhibit Number***, it will be the same on all pages within a single document.

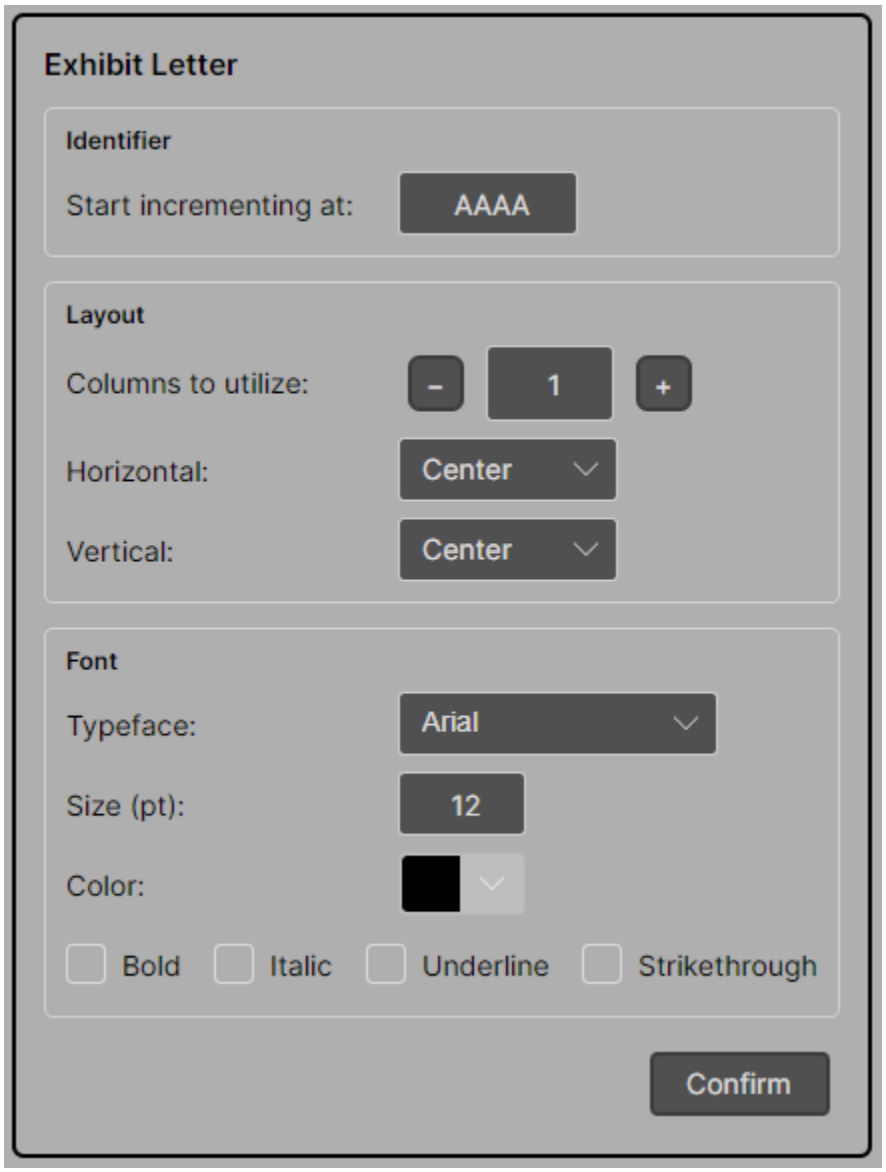


This is where you can set where to start counting from, as well as the number of digits to include in your ***Exhibit Number***. This example starts counting at 1 and will have 4 digits. The number will be padded with zeros until it's the correct length.

The rest of these settings are identical to previous examples.

Exhibit Letters

Exhibit Letters are essentially the same as ***Exhibit Numbers***, just using an auto-incrementing string of letters. AAAA, AAAB, AAAC, etc.

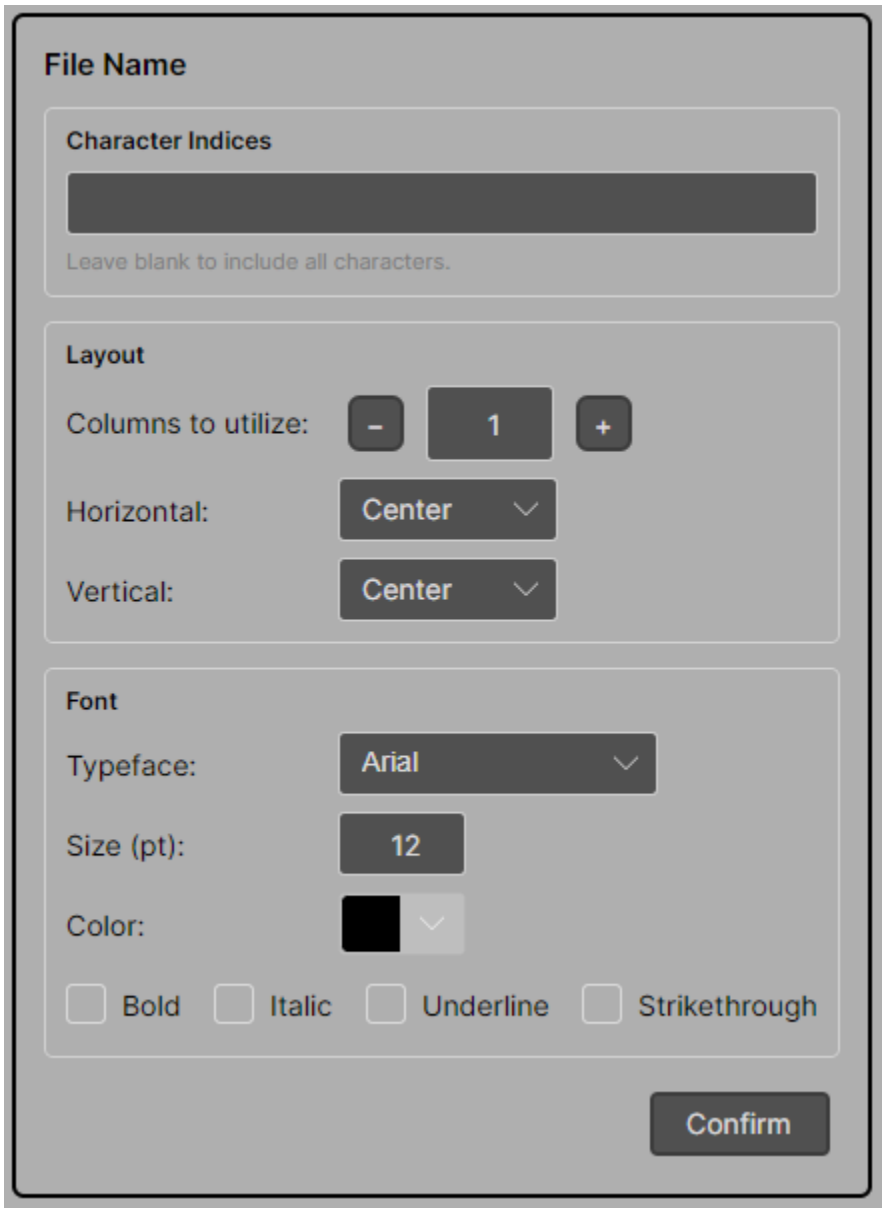


This is where you can set where to start incrementing from, as well as the number of characters to include in your ***Exhibit Letter***. This example starts counting at AAAA.

The rest of these settings are identical to previous examples.

File Names

File Name elements allow you to insert characters that are in the original file name of imported documents. You may have a long file name with several different pieces of information in a well-structured pattern. This tool allows you to extract the information you need, omitting the extraneous information. You can, of course, include the entire file name if that's the requirement.

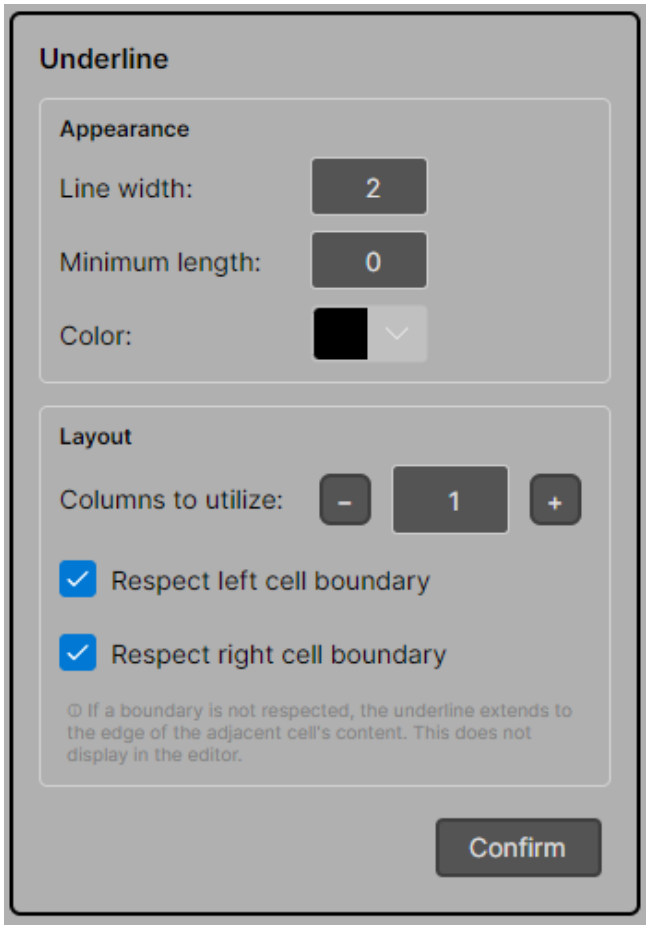


This is where you can define what characters from the file name you want to include. You can list specific characters separated by commas, as well as character ranges. This process is similar to defining a page-range when printing a document. Indices start at 1. For example, if I had a file with the name 20250101Defense.pdf, but I wanted to omit "Defense" and only include the date section of the name, I could tell Mega-Bates to only use characters 1-8.

The rest of these settings are identical to previous examples.

Underlines

Underlines allow you to add a space to hand-write something in the future, separate from having text underlined via the font settings within one of the other data types. ***Underlines*** are unique in that they have the ability to encroach on other data's cells. Let's see how via the options:



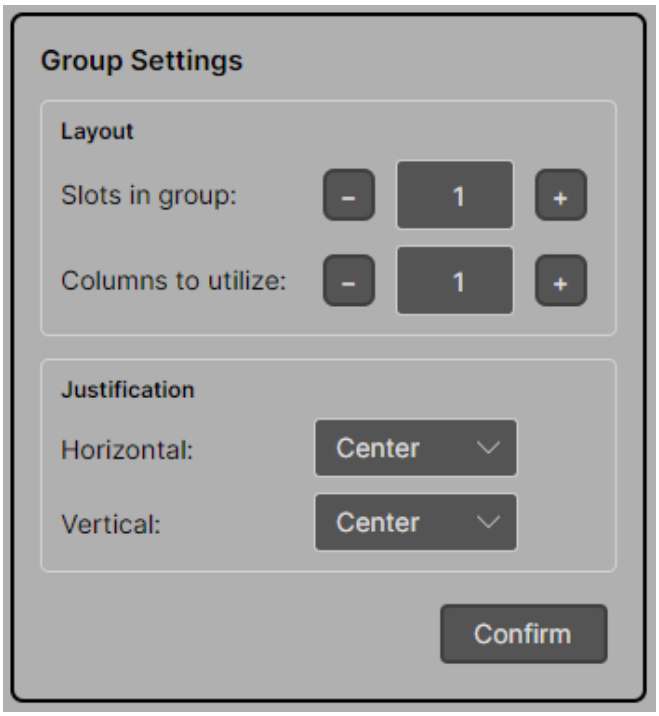
This controls the thickness of the ***Underline***

This controls the minimum length of the ***Underline***, almost like a built-in column spacer

These cell boundary options are unique to ***Underlines*** in that they allow you to span the physical distance between neighboring data, rather than being limited to its own column. This allows for dynamically-sized ***Underlines*** depending on its neighbors.

Groups

Groups enable you to combine other types of data into a single structure, enabling you to adjust their justifications together. Use a ***Group*** when you want elements to stay aligned together regardless of spacing changes elsewhere.



This controls the number of elements that the ***Group*** contains

See the bonus part of the Exhibit Sticker example for a sample use of ***Groups***.

Detailed Interface Tour

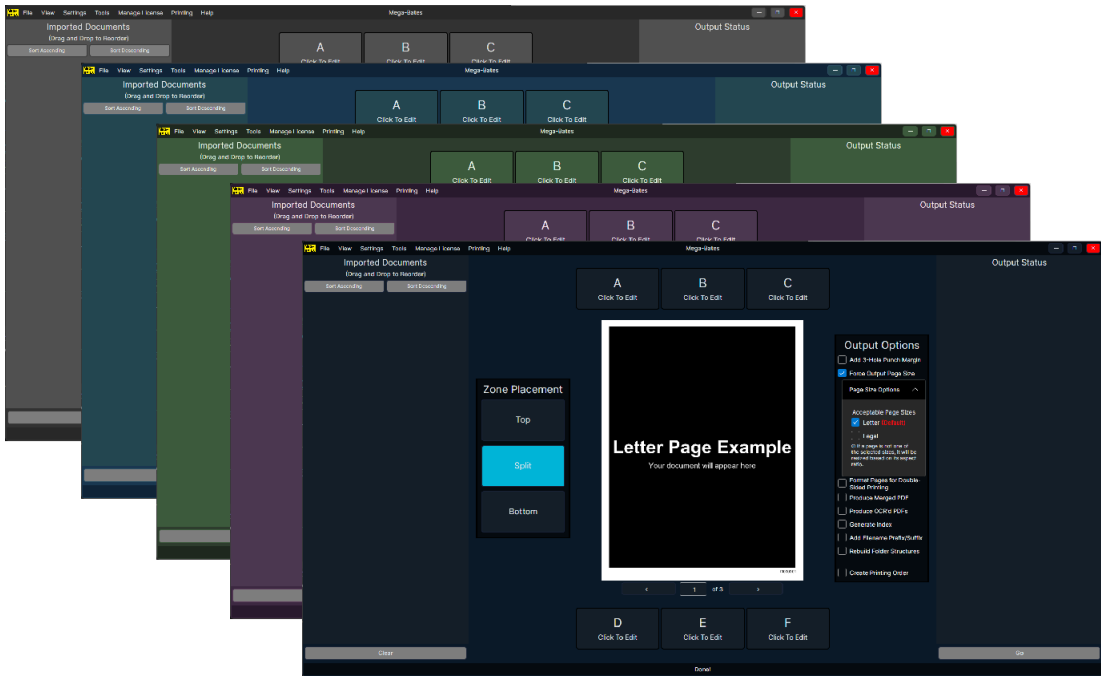
Menu Bar

File

- Open Config
  - This allows you to select a previously saved configuration to load into Mega-Bates
- Save Config
  - Saves the current configuration, including all zones, to a file for future use. This file can be shared colleagues/Mega-Bates installations
- Save as Default Config
  - Saves the current configuration as the default and will automatically be loaded when Mega-Bates launches
- Reset Default Config
  - Restores the factory default config as the one used when launching Mega-Bates
- Import Documents
  - This is one of two ways to import documents into Mega-Bates prior to processing
- Import Folder
  - Will import all documents present in the selected folder, and in any sub-folders present. This folder structure can be rebuilt after processing if you select the “Rebuild Folder Structures” output option.

View

- Set Preview Document
  - This enables you to select one of your own documents to use as the preview document from within the application
- Reset Preview Document
  - Resets the preview document to the default after you previously set it to a custom document
- Preview Display Setting
  - Either zoom in to maximize the width of the preview document, or switch to full page view
- Resets the Mega-Bates window to its default size
- Visual Theme
  - Lets you pick an alternative color scheme for the user interface



Settings

- Concurrency Limit
  - Sets the number of tasks that Mega-Bates will process at a time. By default this is set to ⅔ of the number of processing cores your computer has. The max number allowed is equal to your core count.

Tools

- Create Template
  - Prompts you for a .megaz zone config file and then lets you define a template that can be easily added to a zone in the future. After creating a template, it will be present in the “Load Template” menu from within a zone editor for future use.
- Import Template
  - If someone has shared a template with you, this enables you to import it and make it available in the “Load Template” menu from within a zone editor for future use.
- Check for Password-Protected Files
  - Runs a scan of imported PDFs and Microsoft Office documents to attempt to detect password-protected or otherwise unreadable files before processing. You’ll be given the option to remove the unreadable files from the list and export the list of problem files to a spreadsheet once the scan is complete.

Manage License

- License Expiration
  - This is the expiration date of your license. If you bought a subscription, this is the date around which your license will automatically renew.
- License Key
  - This is where you activate your license key and where that key will live, should you want to copy it for some purpose
- Release your License
  - This releases your license, which is required before you can use it on a different computer. If you ever find yourself needing to activate Mega-Bates on a different computer but don’t have access to your previous computer to release it, feel free to contact us! We can release it from our end.
- Purchase a new License
  - This launches our website where you can purchase a new license.

Printing

This printing menu is slightly different from the printing **Output Option** (see Output Options section below). These options apply directly to the imported documents, not the processed versions of the documents with any applied Bates labels or exhibit stickers. Because of this, **Mega-Bates does not need to be activated with a license key to access this functionality.** You’re able to submit printing orders with a page count and color analysis of pre-existing documents without an active license.

- Submit with color and page count analysis
  - Counts the number of pages, as well as performs an analysis of the number of pages containing color/grayscale content vs Black and White
- Submit with only page count analysis
  - Only counts the number of pages, assumes 60% color for the estimate. You have the ability to change the color percentage in the order form if you already know the breakdown.
- Submit with no analysis
  - Doesn’t do any analysis at all, just launches the order page

Help

- About
  - Lists the build date of your version of Mega-Bates. This will be useful if troubleshooting with support is ever needed
- Quick Tour

    - Relaunches the quick tour that you were presented with the first time you launched Mega-Bates
- Tutorials
    - Launches the Tutorials page of our website, which has walkthrough videos and other resources (including this guide)
- Contact
    - Launches the “Contact Us” page of our website

Update

This menu item will only be visible if Mega-Bates detects that an update is available.

- Close Mega-Bates and Launch Update Page
    - This will exit Mega-Bates and take you to the update page of our website. Mega-Bates must be closed for the update to succeed.

Importing Documents

There are two methods of importing documents into Mega-Bates:

- File -> Import Documents or Import Folder
    - Standard way to import files
- Drag and Drop files or folders from your Computer
    - You can drag and drop files and folders from your file explorer directly into the import pane on the left side of the UI

Once your documents are imported, you can then rearrange them by dragging and dropping. This is an important step if you are applying numbers across all documents, such as an Exhibit Letter or Exhibit Number, as well as a page number that spans all documents if a specific order is required. You also have the option to sort alphabetically. Mega-Bates supports PDFs, most image formats, as well as Microsoft Word and PowerPoint documents (requires Microsoft Office to be installed on your computer).

Zone Arrangement

- **Top**
    - All zones are at the top of the page
- **Split**
    - Zones are split between the top and bottom of the page: A-C on the top, D-F on the bottom
- **Bottom**
    - All zones are at the bottom of the page

Output Options

- **Add 3-Hole punch margin**
    - Adds extra space to accommodate printing on 3-hole punch paper or future use of a 3-hole punch
- **Force Output Page Size**
    - Gives options to scale all pages to Letter, Legal, or either Letter or Legal. If a page isn’t already an allowed size, it will be scaled to one of the allowed sizes depending on its dimensions.
- **Format Pages for Double Sided Printing**
    - This adds a blank page to odd-numbered page count documents to help facilitate double-sided printing. This prevents the first page of a document being printed on the back of the last page of another. This setting will also cause the 3-hole punch margin to alternate side to side to accommodate the holes.
- **Produce Merged PDF**
    - This will produce a merged PDF of all processed documents. This will be an additional PDF. The individual processed documents will still be present in the output.
- **Produce OCR’d PDFs**
    - This will produce OCR’d versions of the output. These will be additional PDFs. The regular versions of the processed documents without OCR will still be present in the output.

- **Generate Index**
    - This option creates an Excel-compatible spreadsheet with information about the documents you processed, including the filename, page count, and the range of values applied in any zones you include. This is helpful when creating an Exhibit List or just to keep organized. After enabling this option, select the zones that you'd like to include in your index spreadsheet. By default, the filename, pagecount, and any auto-incremented filename prefix or suffix will be included, but you can select which zones you include in addition to these default items.
- Add Filename Prefix/Suffix
    - Enables you to decorate the filenames of outputted documents with a prefix or suffix. There is a static option as well as an auto-incrementing option. If an auto-incrementing option is selected, this will also be included in its own column within the generated index (if enabled).
- Rebuild Folder Structures
    - If you imported documents via the Import Folder menu or you dragged a folder into the Import pane, this will rebuild that folder structure on the output, including any sub-folders that may have been within the imported folder.
- **Create Printing Order**
    - This gives you options to start a printing request. You have the option to perform a color analysis which will give you a more accurate estimate when submitting your order. This will cause the order form page of our website to launch once all processing is complete. This does ***not*** send us your documents. After we receive your request, we will reach out to you to coordinate getting the documents from you in a manner that aligns with your requirements.

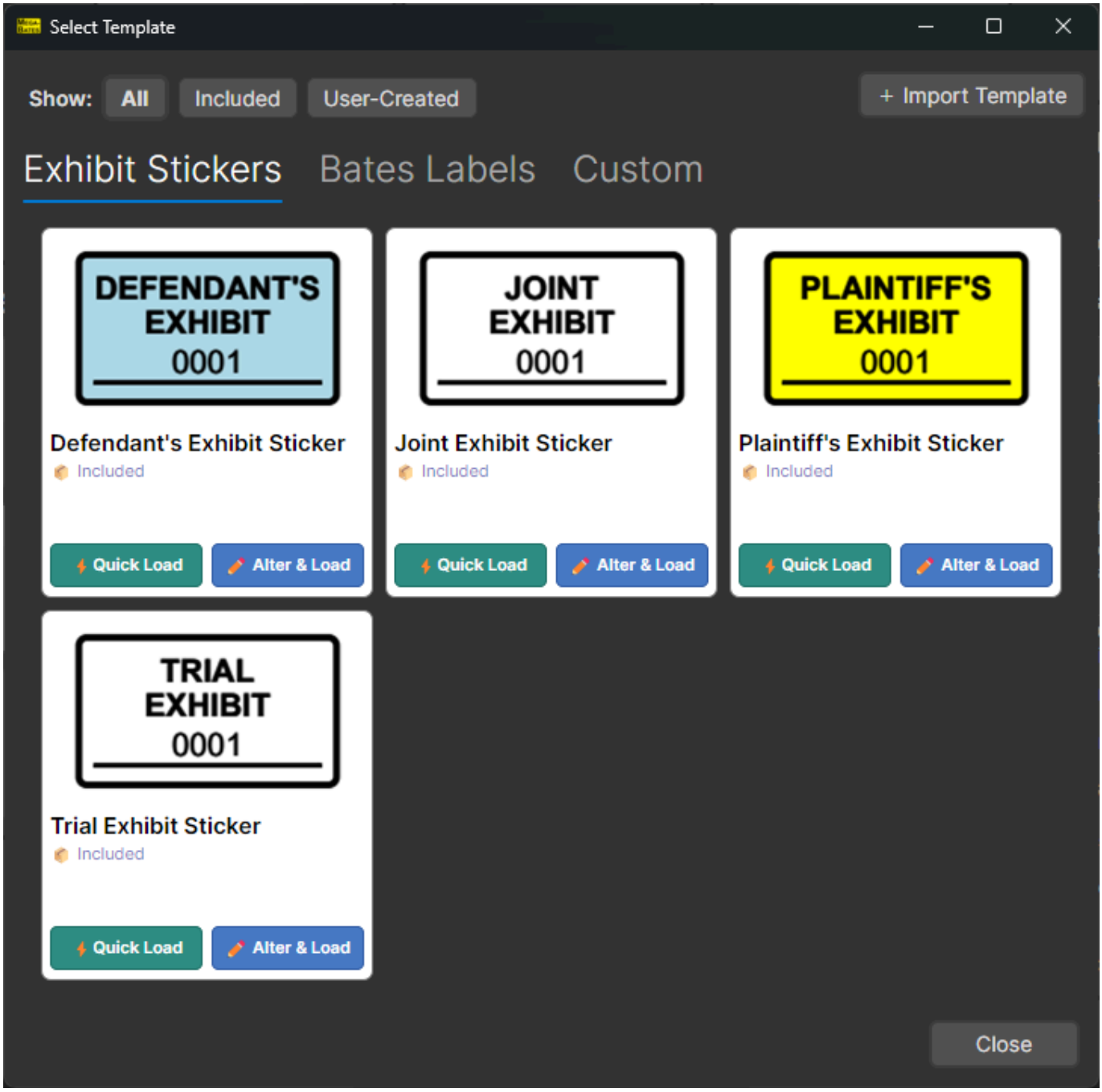
Zone Templates

Mega-Bates ships with some pre-built templates that you can directly load into your zones! You also have the ability to create your own templates for easy reuse and to share with colleagues.

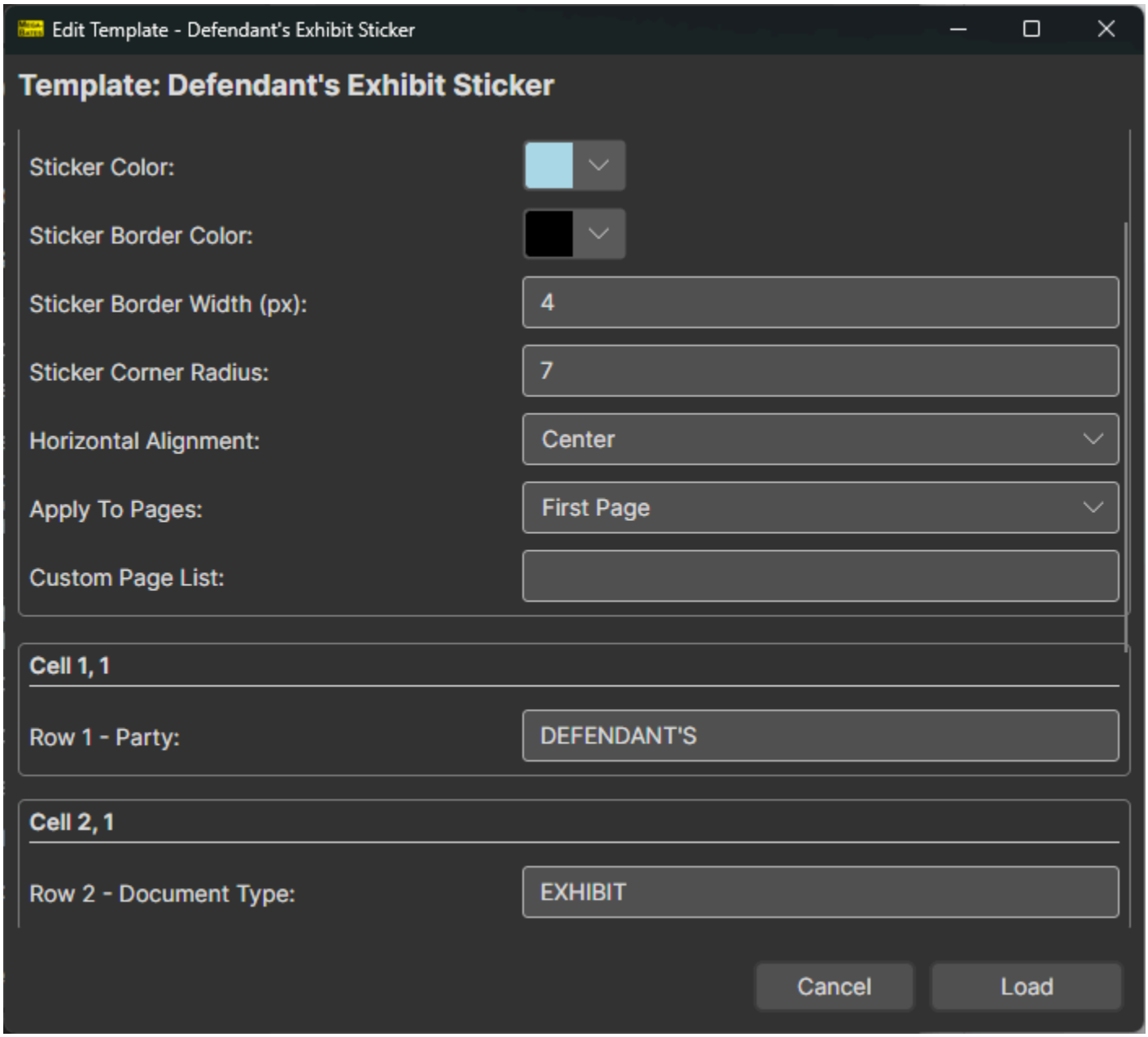
Loading a Template

You can load a template from the “Load Template” menu within a zone designer.

Mega-Bates has several exhibit stickers, Bates labels, and custom data options included. To select a template to directly load, you can double click on the card or click “Quick Load”.



If there's something about the template that you'd like to edit, you can select "Alter and Load". This will let you change aspects of the template before loading it in an easy-to-use interface.



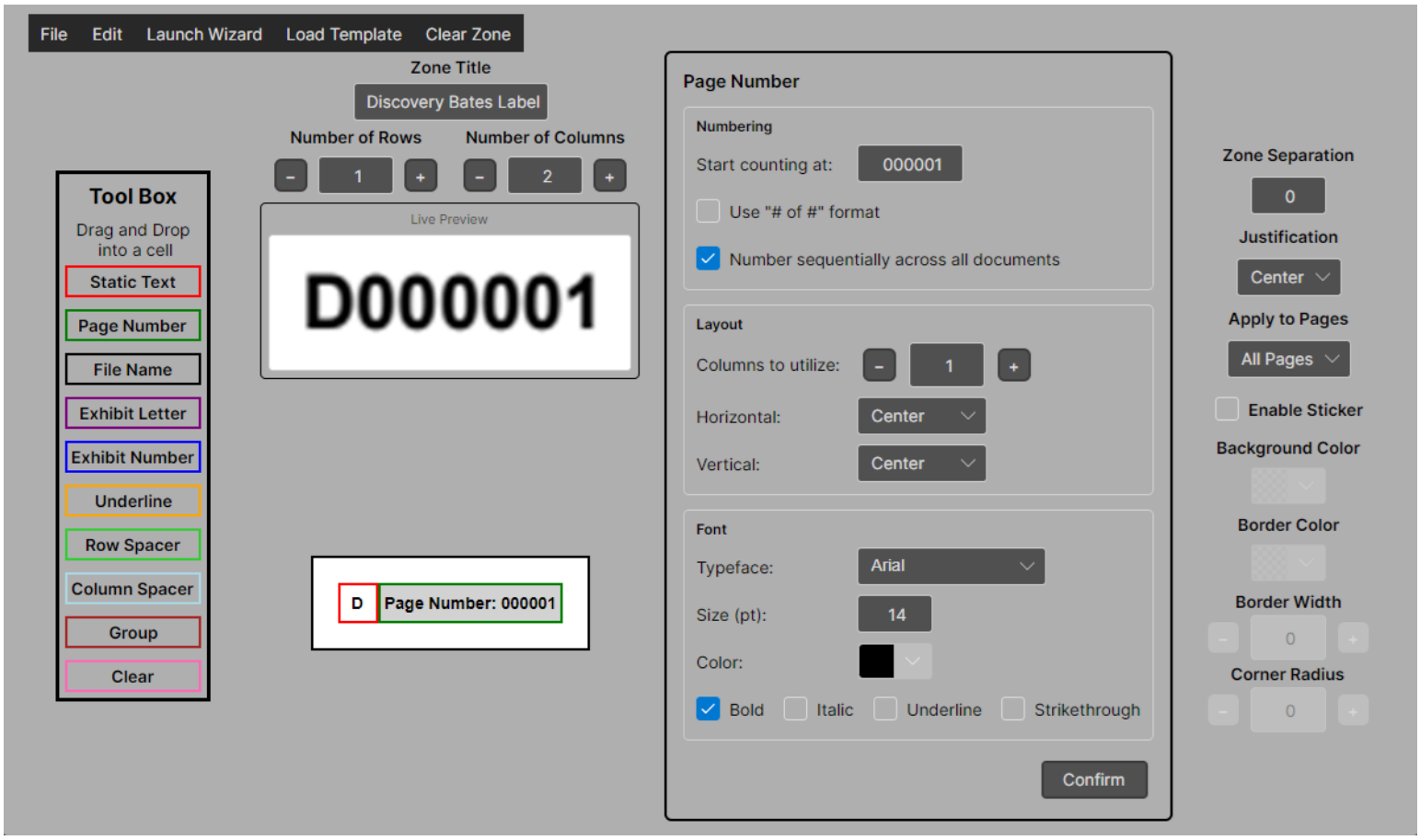
You can always load the template and then edit it directly within the normal designer for fine tuning.

Creating a Template

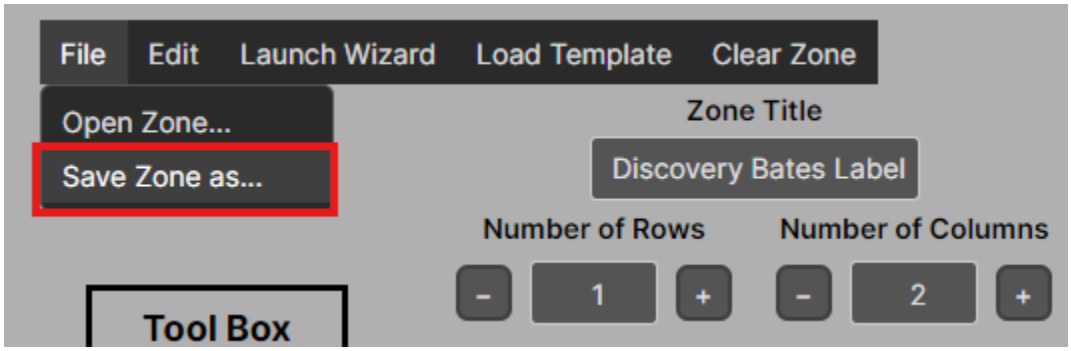
To create a template, the first step is to build a zone normally via the zone designer. Let's create a template for a discovery Bates label as an example:

Discovery Bates Label Template Example

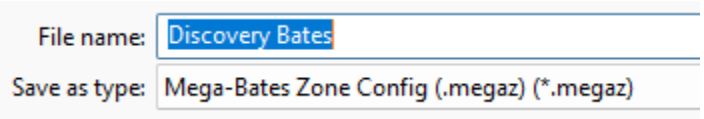
First, we'll design our simple Bates label in the designer:



Next, we'll save the zone to a zone config file (.megaz) by going File -> Save Zone as…

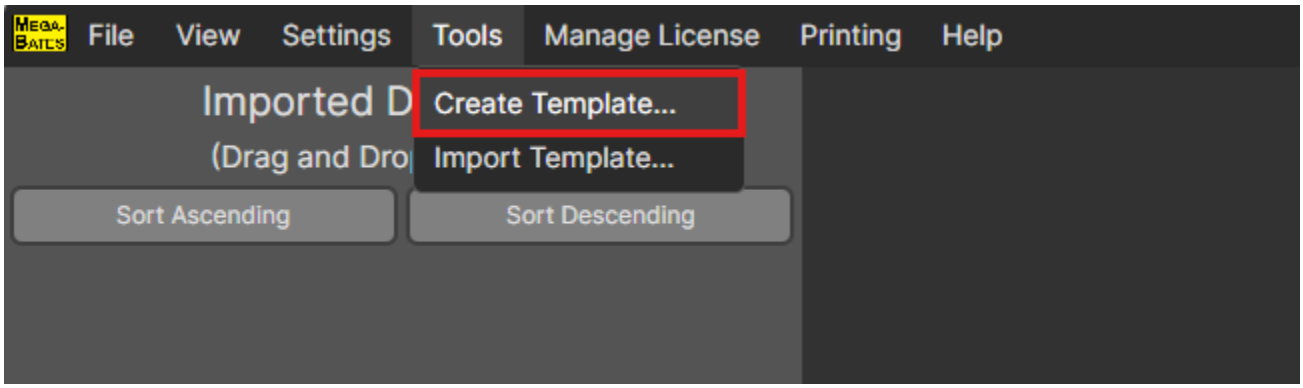


Give it a good name:

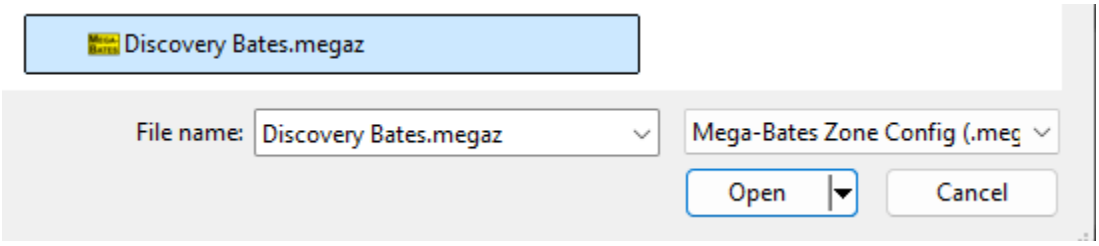


(hint: you can also just open this file in the future using File -> Open Zone… Creating a template will just include it in the template menu with a preview image for easy management)

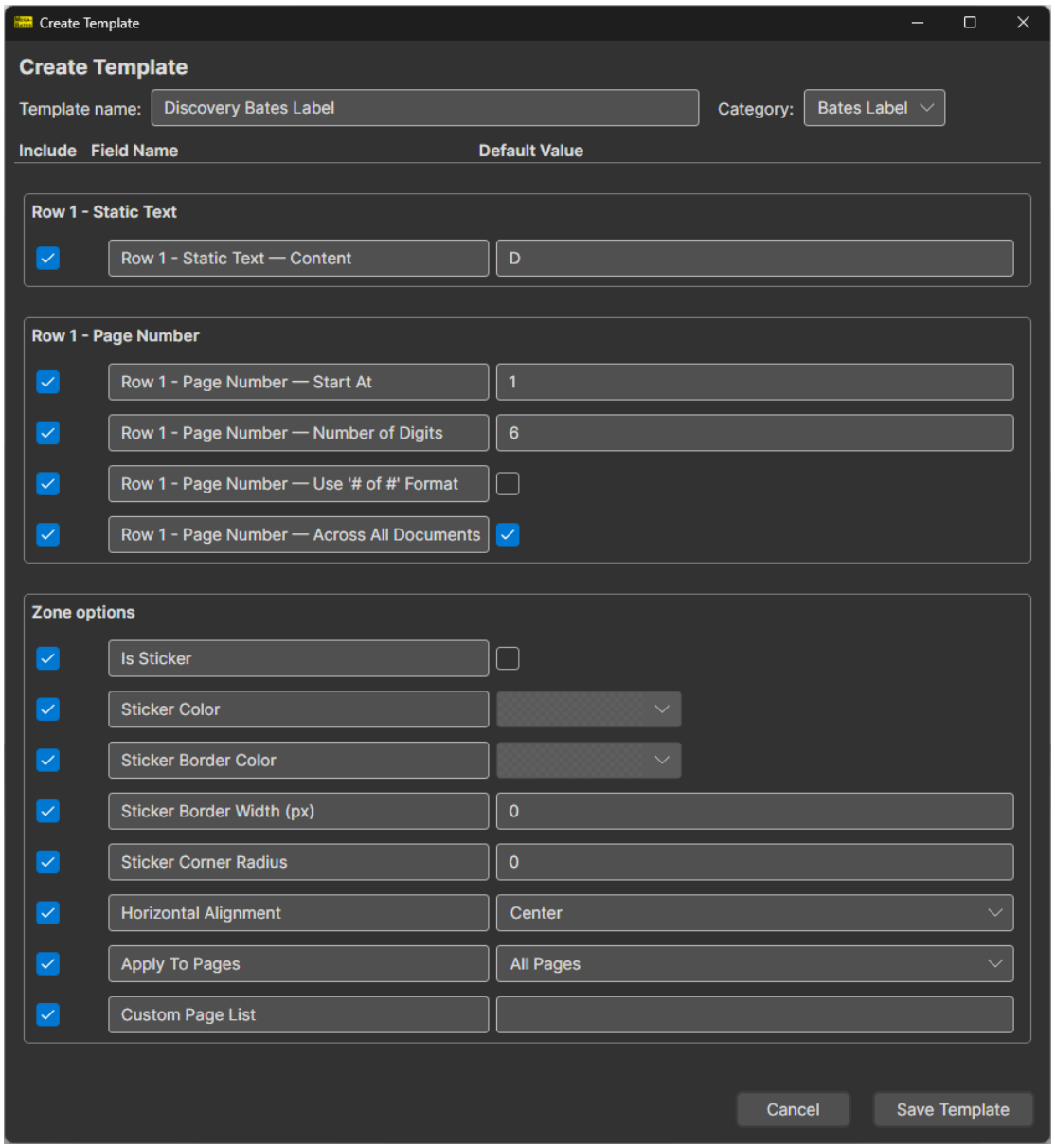
Next, we'll create the actual template:
Click out of your designer and go to the main Mega-Bates toolbar and find Tools -> Create Template…



Navigate to, select and open the zone config file we just saved:



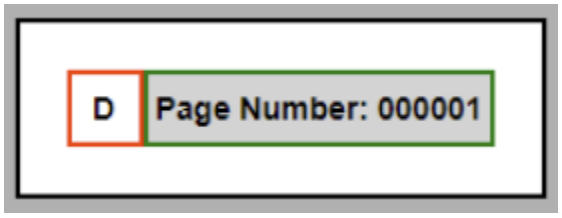
You'll be greeted with this template configuration wizard:



This is where you can define what elements of the template you want to be editable, as well as any names you want to assign to each field.

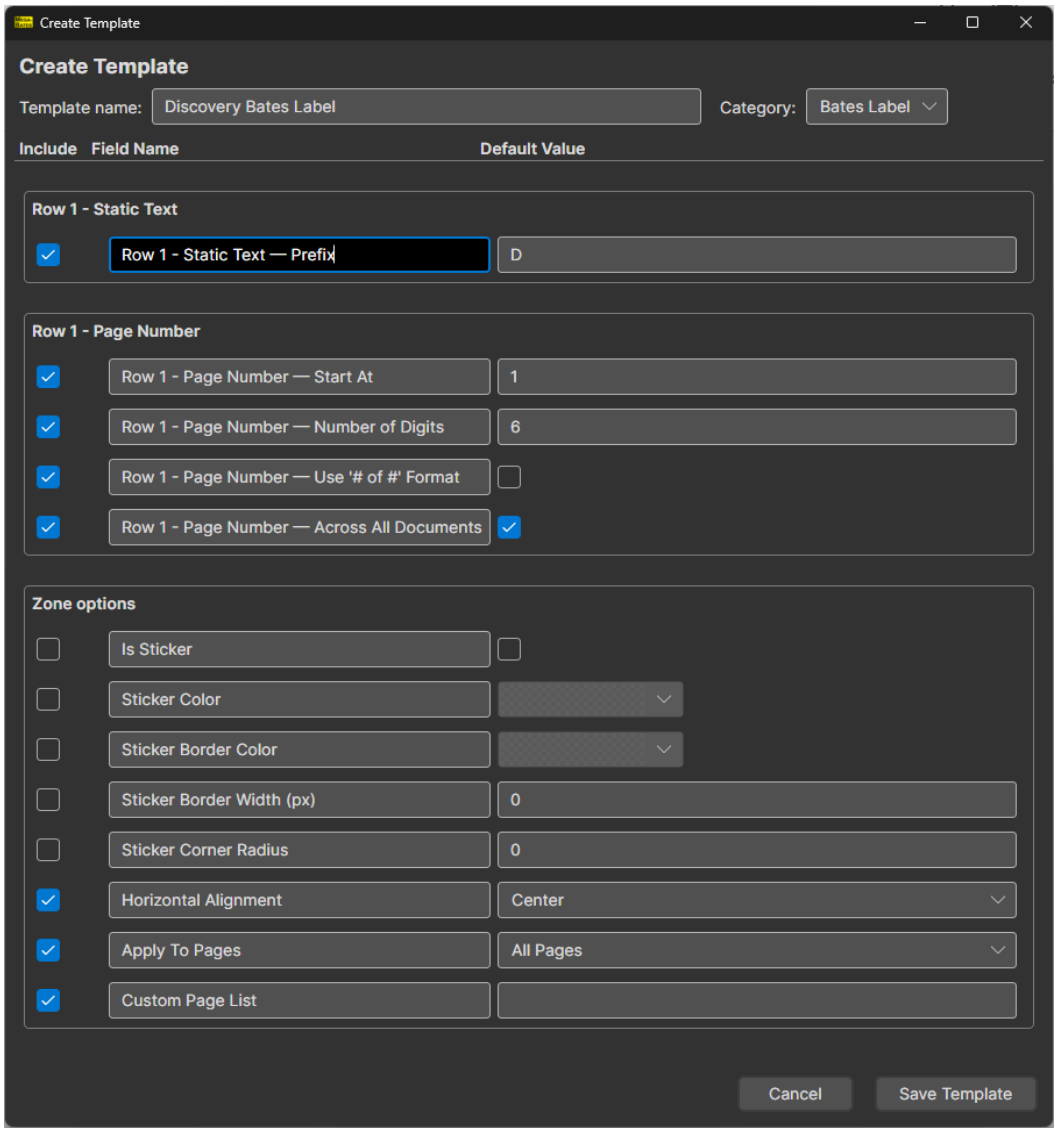
Notice that the template name is pre-populated with the zone name I entered during the initial creation of my zone config, and the Bates label category was pre-chosen for me based on the name. **Be sure to check if the category is correct for the type of template you're creating. Sometimes Mega-Bates won't be able to infer the category from the Template name and a default category will be chosen.**

Let's take a look at my original Bates label configuration.I had a ***Static Text*** prefix of "D", and a ***Page Number*** starting at 1 with six digits total:



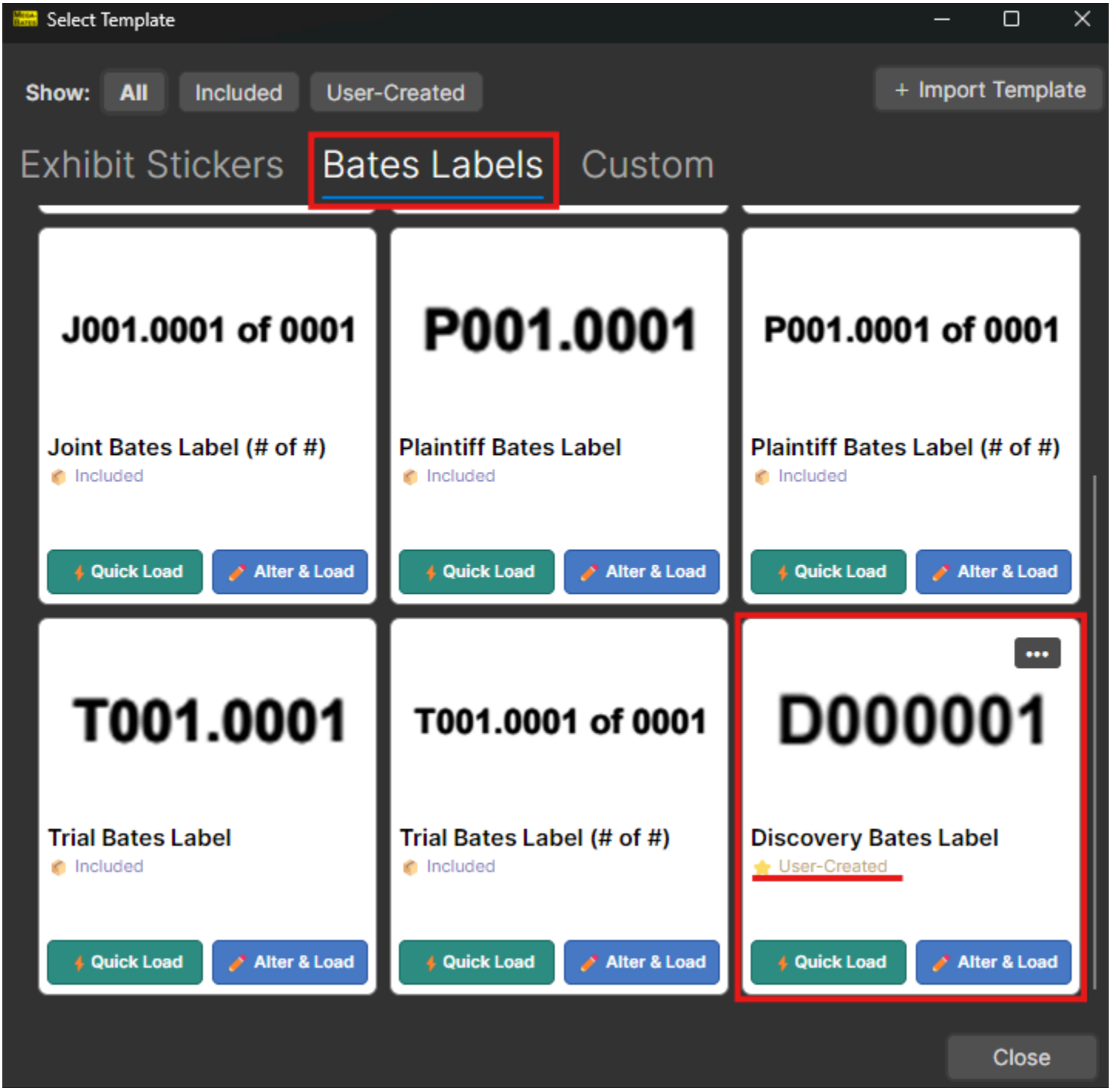
Let's say I want a future user of the template to be able to edit the content of the prefix, as well as the starting position and number of digits of the ***Page Number***.

I don't want them to be able to turn this into a sticker, but changing the alignment and the pages to apply the template to seems reasonable.

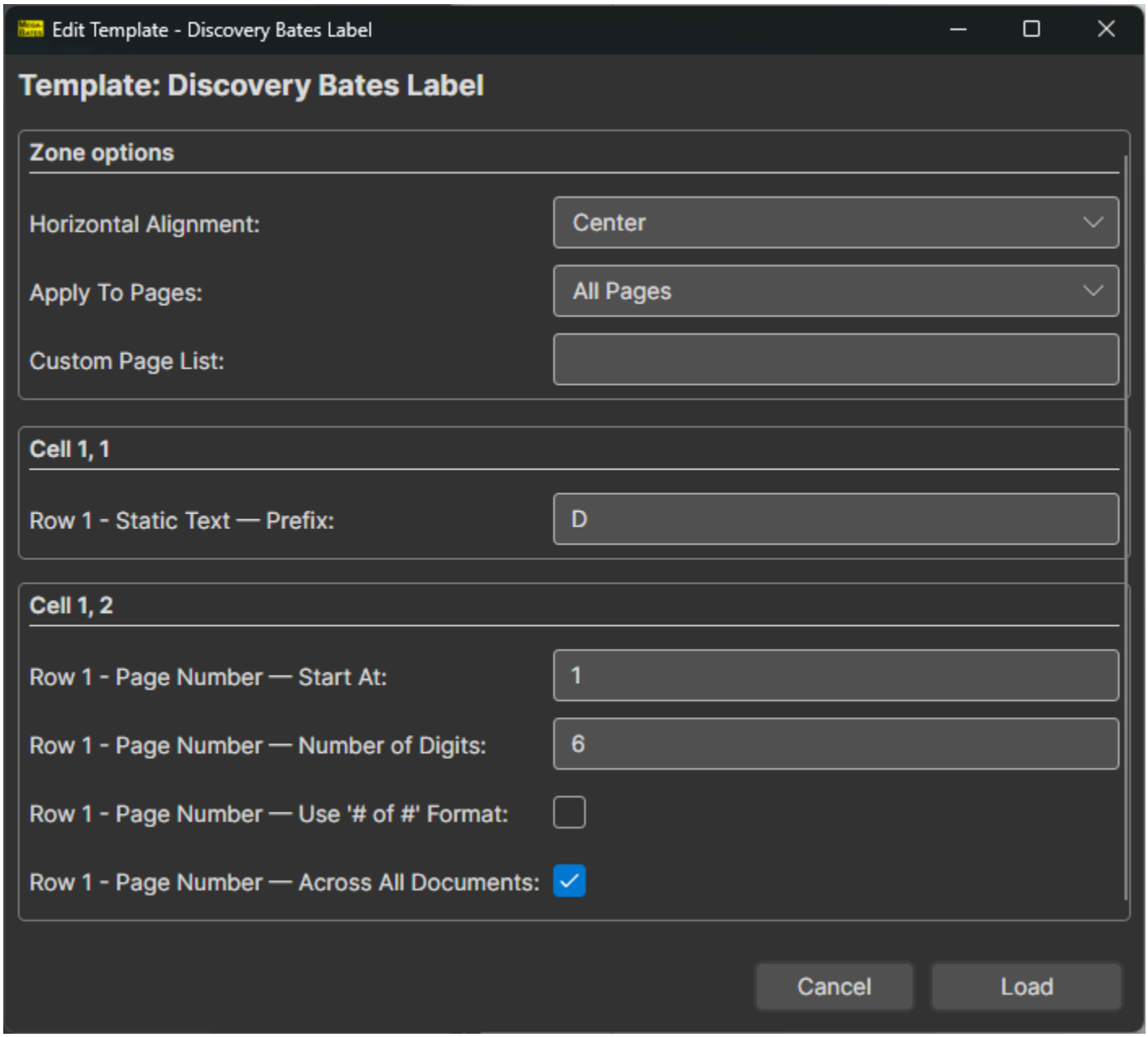


To restrict editing some aspects of the template, uncheck the “Include” checkboxes on the left side. You can also rename a field to make it clearer to the user what the intended data is. Notice I changed “Content” to “Prefix” for the ***Static Text*** element.

Finally, click “Save Template” on the bottom right, and you’re done! Your template will now be available for use in the “Load Template” menu from within a designer! A preview image of your template is automatically generated:

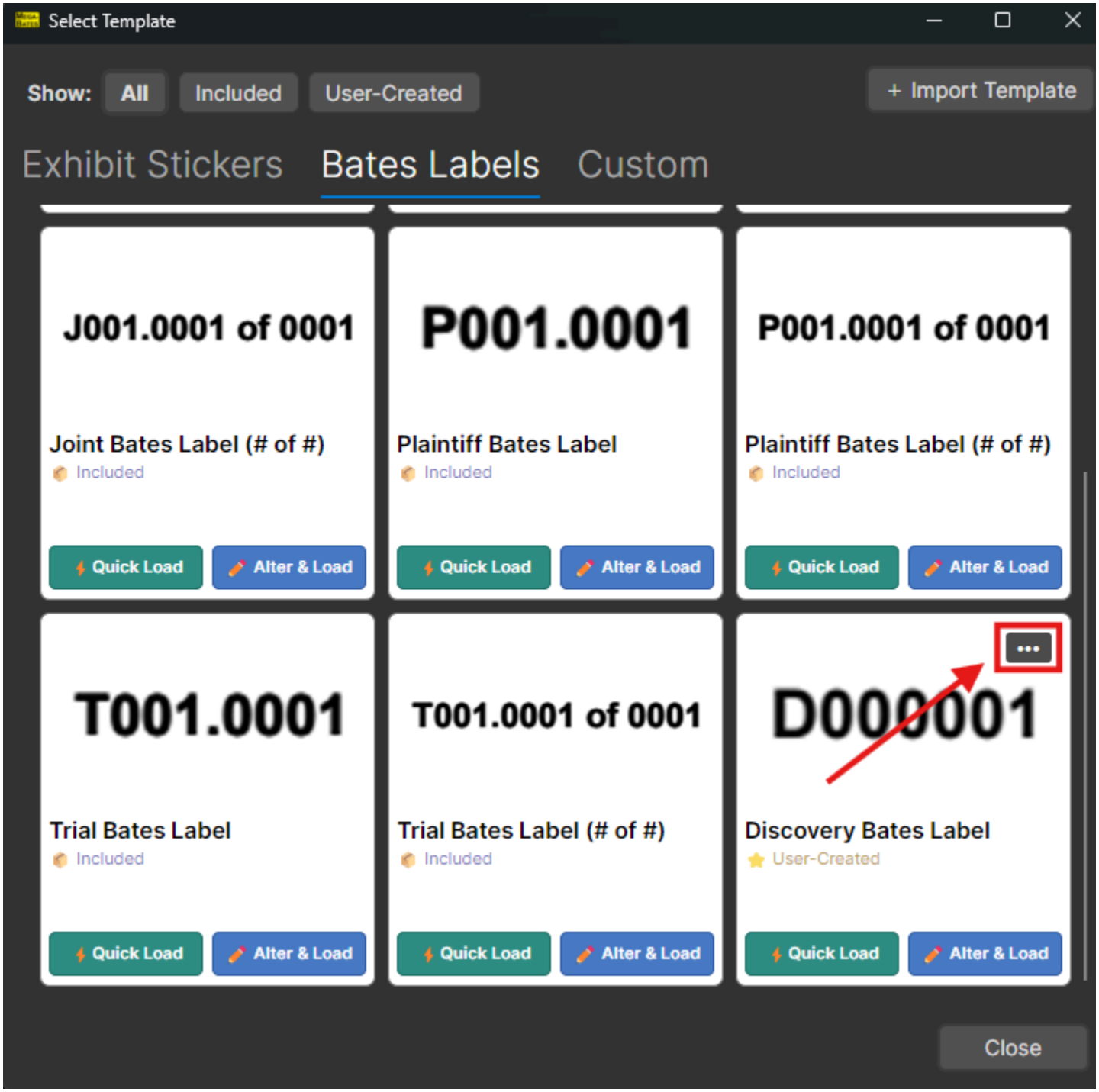


If you were to click “Alter & Load”, we can see that only the fields that we included during the template creation are available to alter:



Exporting and Importing a Template

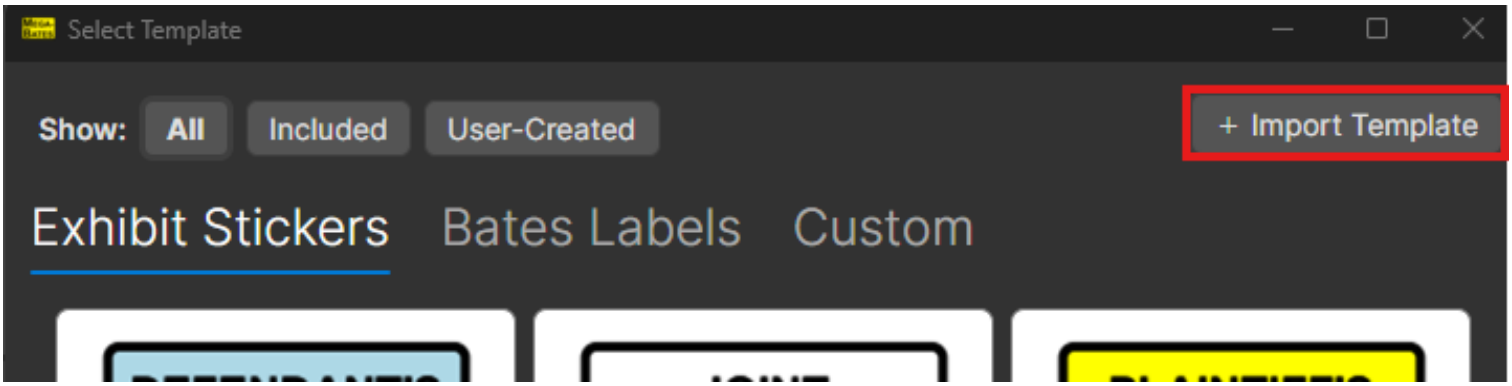
If you'd like to share a user-created template with a colleague, you can export it! Click on the menu icon on the top-right of the template card and choose Export.



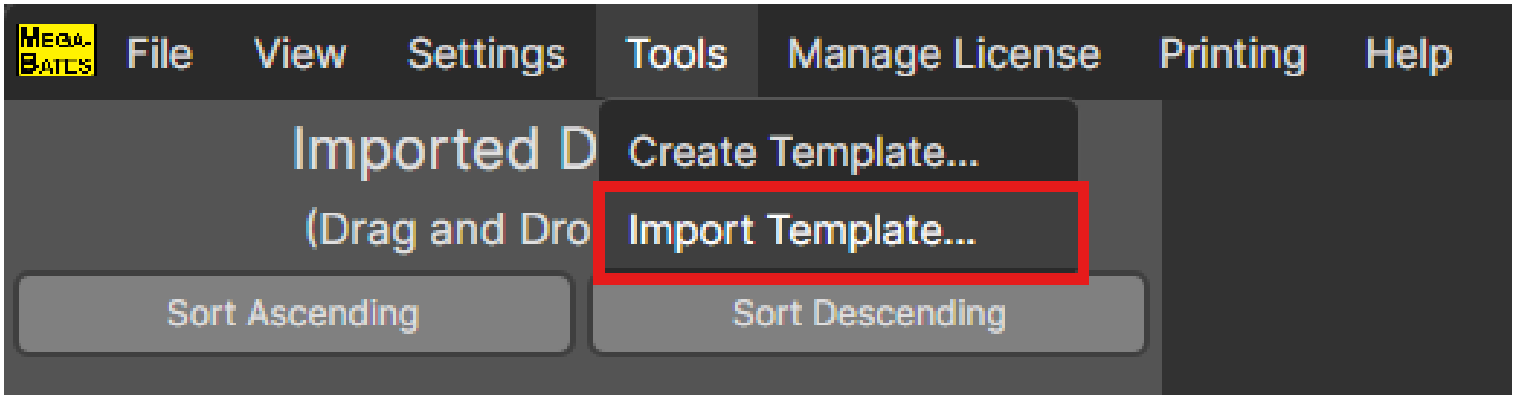
Choose a location to save and a .megazt template file will be created. Please note that only user-created templates will have this menu.

You can share this template file with a colleague who can import it 2 different ways:

1. Click the Import Template button within the Template menu itself



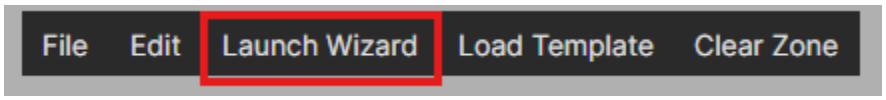
2. Go to Tools -> Import Template… on the main toolbar



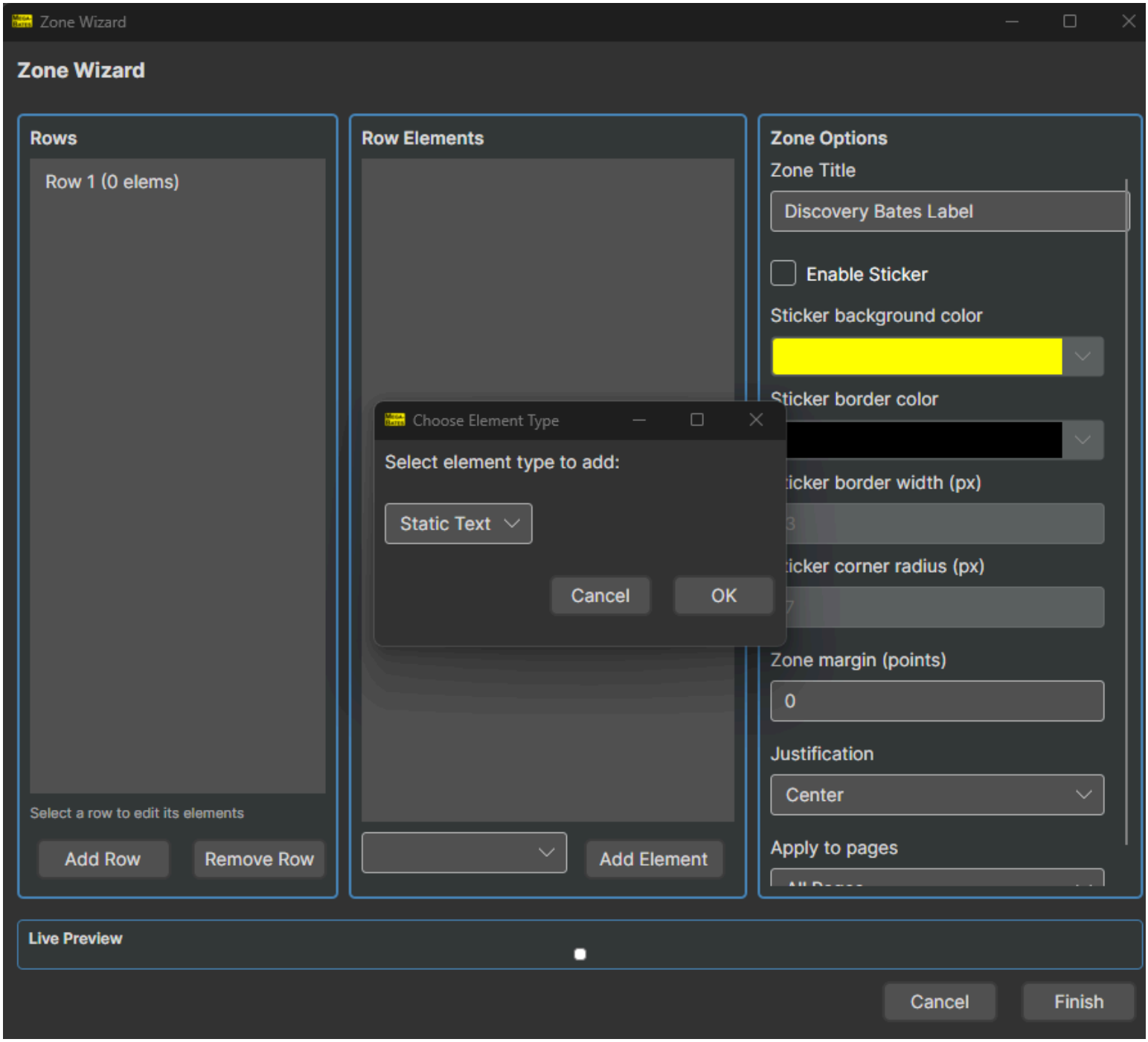
The template will now be available via the Load Template menu for future use.

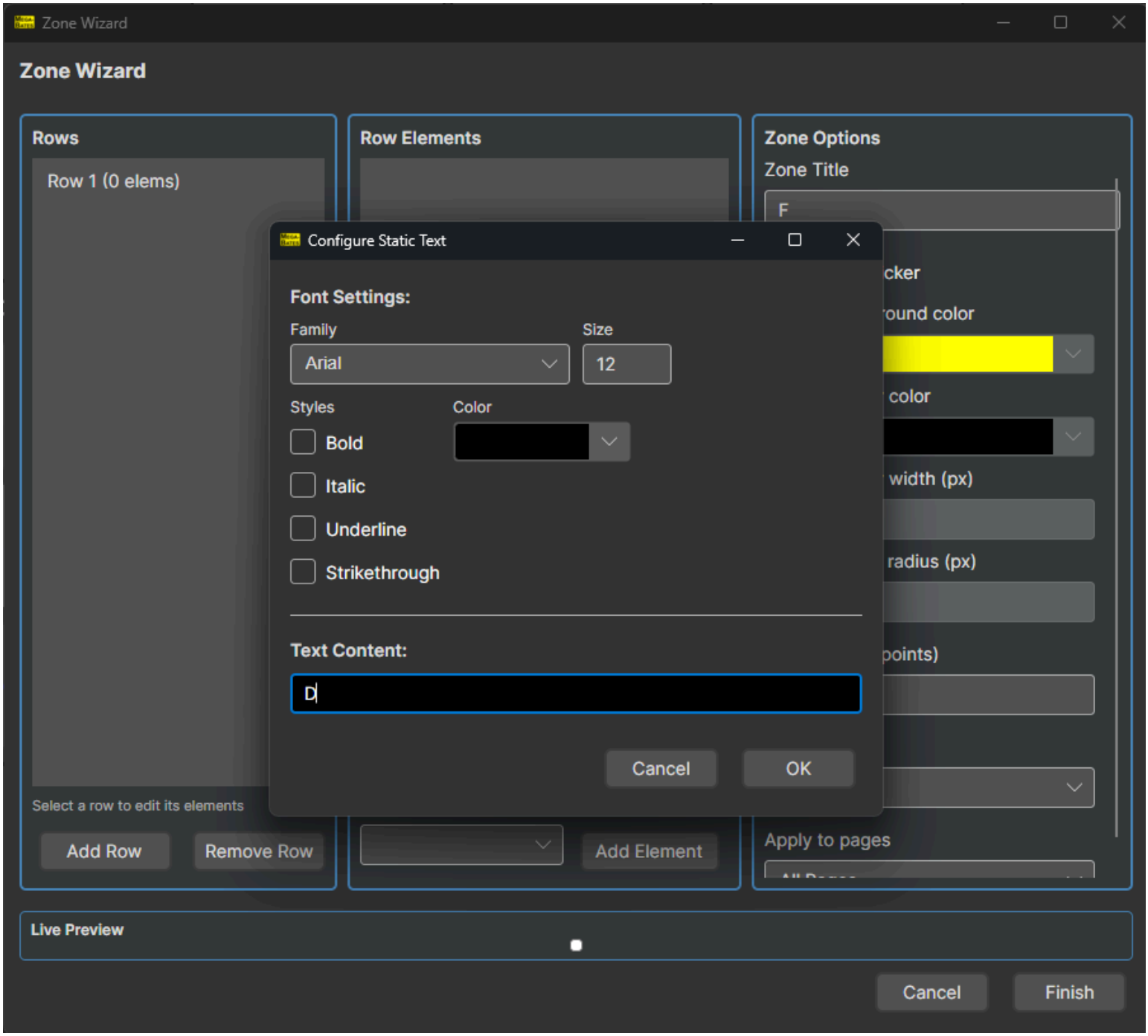
Zone Wizard

The zone wizard is great for creating simple zones if you'd rather not use the more complex designer or a template. All rows in a zone created by the wizard will contain exactly one group element, within which all elements you add will be placed. This will keep everything simple when it comes to alignment across the rows. The wizard's functionality is limited, but it can be a great way to get a zone created if you're new to Mega-Bates. You can always tweak what the wizard produces within the normal designer after the fact.

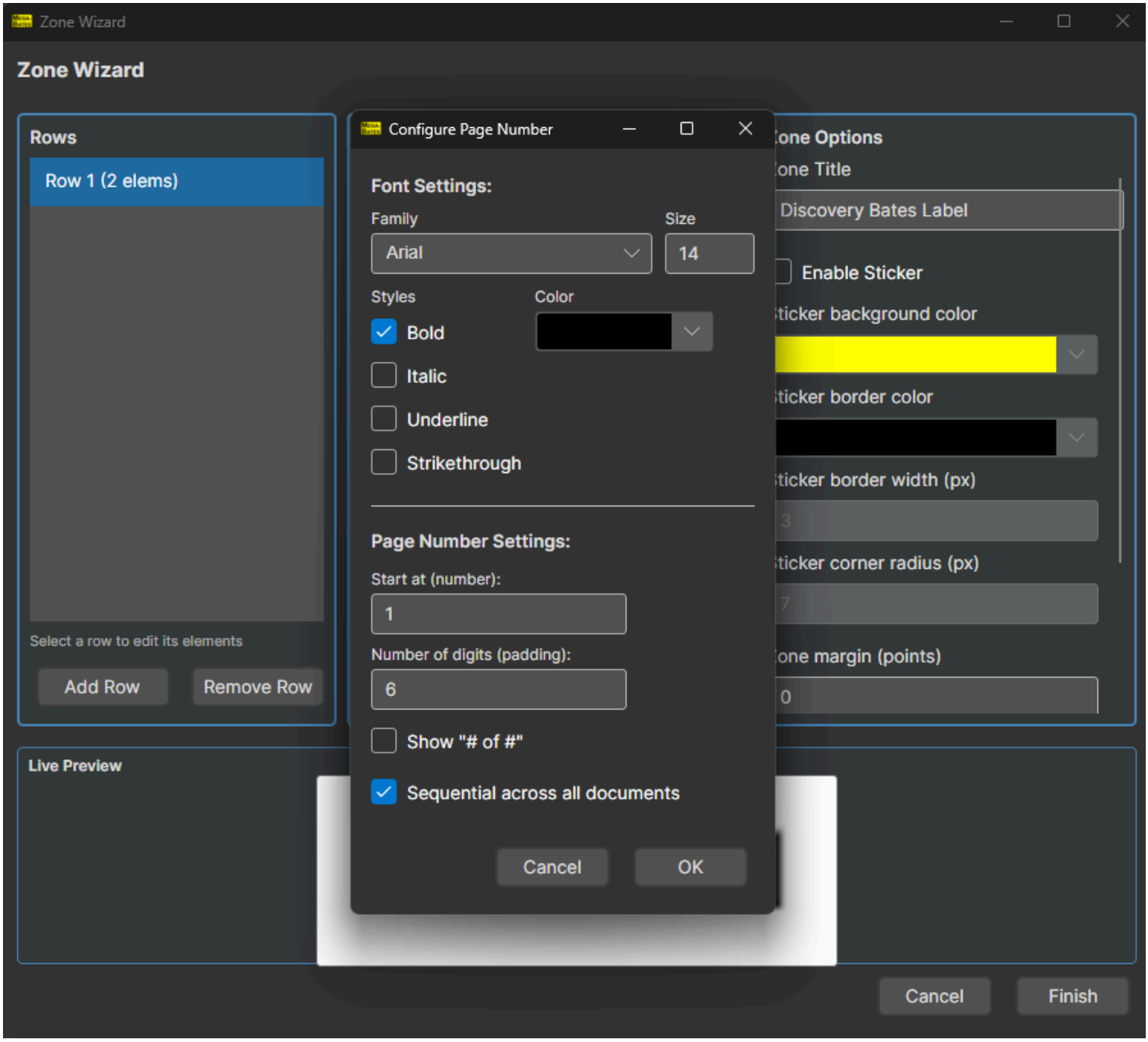


The wizard will prompt you to add elements. You can choose the element type you'd like to add from the dropdown. Elements will be added from left to right. As you build, watch the live preview on the main wizard window to see you zone take shape! Let's build the same discovery Bates label that we made with the template as an example:



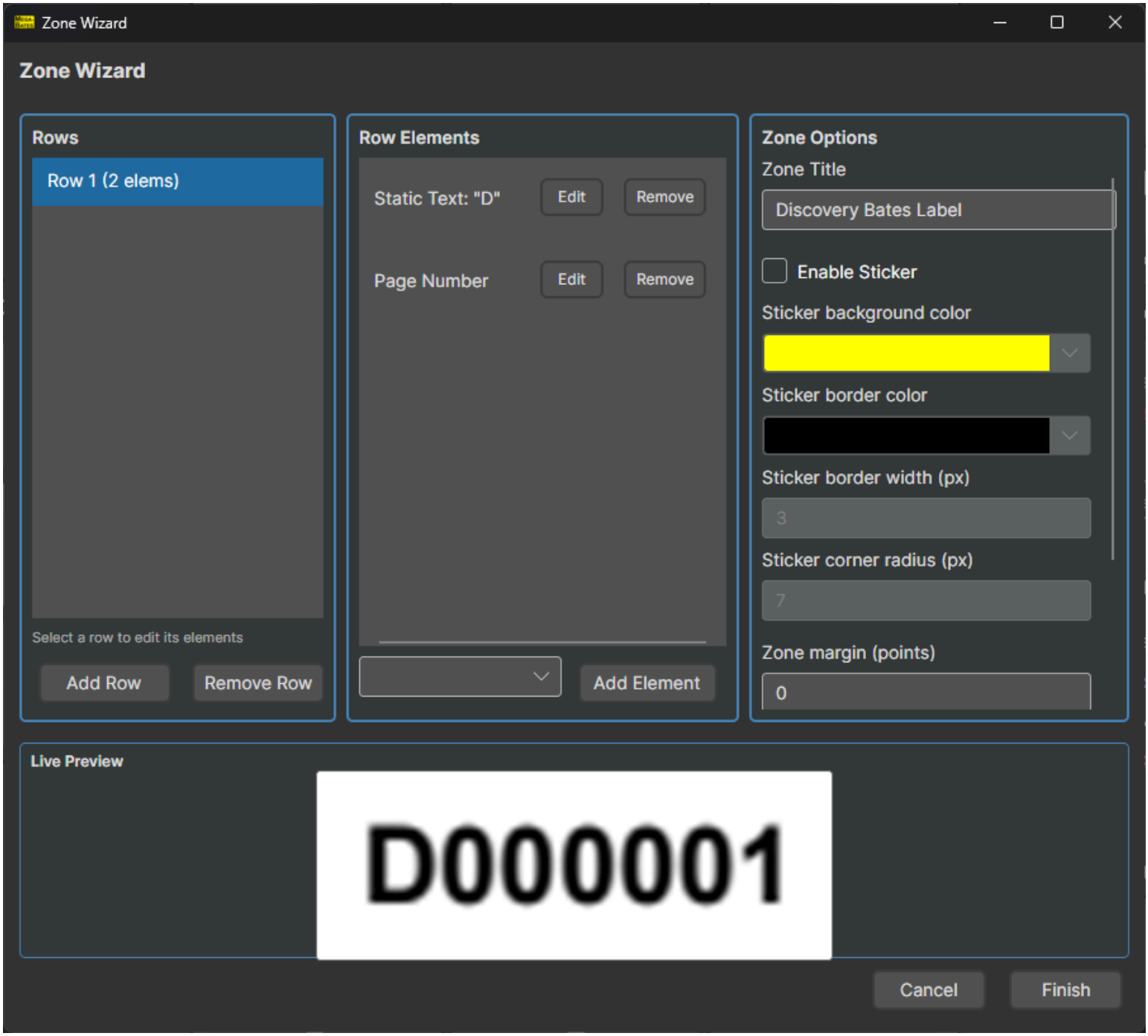


Click ok, and when it asks if you want to add anything else to this row's group, say yes!



That's all we need to add, so say no the next time you're prompted to add anything else to the group.
The next question is if you want to add another row to your zone. In this example, we do not, but if you were creating a sticker or some other type of data that required multiple rows, feel free to say yes. The loop will continue as it did for the first row.

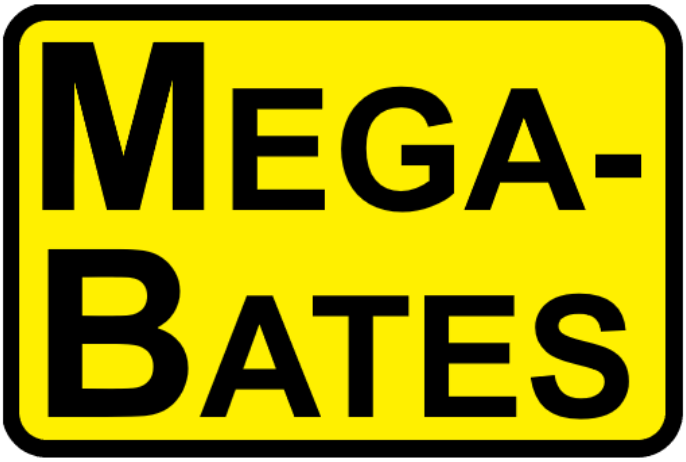
After you've added all of your elements and data and exit the question loop, you'll be able to interact with the main wizard page. Here you can see all of the rows you added in the left-most column, the selected row's elements in the center column, and zone settings in the right-most column. You also have options to add more rows and elements, as well as edit elements that you've already placed.



Review the live preview to make sure everything looks good, and then click finish to see it applied to the main preview.

Releasing Your License

A Mega-Bates license can only be used on a single computer at a time. If you ever want to use Mega-Bates on another computer, you need to release the license from your current computer and activate it again on your other computer. You can also purchase another license if you require multiple computers to be running Mega-Bates simultaneously. Please keep in mind that any time you need to adjust your license, whether it be activating it or releasing it, an internet connection is required. Once you click **Release License** from within the **Manage License** menu, Mega-Bates will be deactivated and a notification email will be sent to the address on file with a copy of your license key for easy copying and pasting on your other computer.



Your license has been unlinked.

Your license has been unlinked from your previous computer and can now be used to activate Mega-Bates on a new computer.

Your license key: [redacted]

If you ever need to release your license from a computer that you don't have access to, please contact us via our support channels (below)! We can release it from our end.

Conclusion

We hope you found this information helpful in getting up and running with Mega-Bates! If you ever have a question or need clarification on anything in this user guide, please don't hesitate to reach out to us!

Phone: (210) 879-4593
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YouTube: https://www.youtube.com/@Mega-Bates
X: https://x.com/MegaBatesLLC