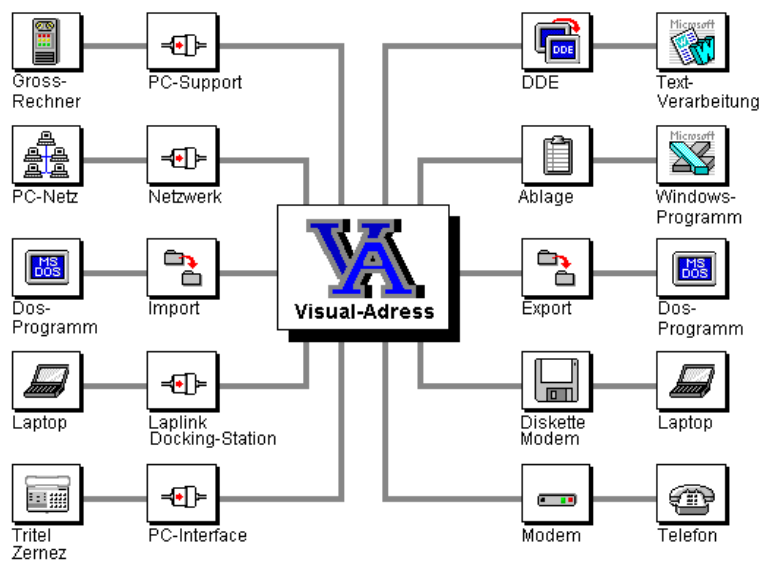


User Manual

Visual-Admin 6.9



02 February 2010

Abex Software AG

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Introduction

Visual-Adress is the universal tool for your Sales and Marketing Department and for your professional staff at the business front.

The Visual-Adress application suite consists of several programmes. These individual programmes are briefly introduced below. This manual describes the use of Visual-Admin.

Visual-Adress

The entire application is focused on convenient address management. It also links together notes, address-related documents and schedules.

- Selection windows containing master data
- Automatic testing for duplicated addresses
- Postcode file with cities and dialling codes where available
- Country-specific address editing
- Phone dialling by modem

Visual-Admin

In the database designer you can easily adapt your own data tables to your organisation's requirements, design and save the layout of screen input forms.

- Database designer for various data formats
- Online links to external data
- Client management of up to 255 address masters
- Screen layout for master data and notes

Visual-List Designer

The integrated list designer allows you to design all reports according to your preferences. By using drag and drop you can supplement, copy and adapt existing reports. The list designer unifies the convenient operating features of a modern word processor.

- Access to all data fields
- Group indices and arithmetic functions
- Integration of graphics, lines and frames design

Visual-Switch

This programme allows laptop users to switch between local and server based data.

Visual-Exchange

This programme allows bidirectional synchronisation of all data processed with Visual-Adress between server and client installations. This includes addresses including their add-on information, notes and dates as well as linked documents processed with e.g. Word or Excel.

Included in the basic version of Visual-Adress is the "Light" version of Visual-Exchange. This version allows to synchronise data for laptops, which are connected directly to the network, e.g. for field staff.

Visual-Synchro

This programme allows bidirectional synchronisation between Visual-Adress and Microsoft Outlook.

Visual-OLE (Automation Server)

Together with Visual-Adress you also received an OLE Automation Server (OLE). It allows external applications, e.g. order processing, to directly access the addresses in Visual-Adress. Examples and suggestions are included as Word documents. The OLE interface assumes programming knowledge and is mainly designed for software developers and experienced users.

Visual-Admin Basics

Visual-Admin is the application to set up most functions available in Visual-Adress. It is used to customise Visual-Adress to the needs of your company.

Visual-Admin intervenes deeply with the structure of the Visual-Adress database. You can change and set many parameters in Visual-Admin directly. It is however designed to allow its operation by a trained user. It is recommended to assign a dedicated administrator, if you have set up a multi-user system.

Start-up and Personal Settings

Start-Up

Note:

Access to Visual-Admin has to be exclusive, i.e. no other users may be logged into the database at the same time.

To start Visual-Admin go to *Start > All Programs > Visual-Adress > Visual-Admin*.

Menu Bar

The menu bar shows different icons depending on which main window is open.

- To adapt the menu bar to your personal preferences first open the main window (Current Users, General, Database Tables, etc.) for which you want to adapt it.
- Then click on the down arrow at the end of the menu bar or right-click in the menu bar.
- To insert a command select an existing command or separator on the right part, then select the command to add from the left part and press the right arrow. The new command will be inserted above the command selected on the right part.
- To remove a command select it and press the left arrow.

Menu Window

Here you can set the display to 640/480, 800/600, 1024/768 and full screen. By this you can check whether all forms will be shown completely on all screens in use at your company. To check select the smallest display used.

Current Users

After starting up Visual-Admin you find yourself in the overview of the current users. If there are other users logged in except yourself, you cannot save any modifications to the database structure or forms.

General

The general area deals with user independent settings, which are valid for all users. Most settings are valid for the entire installation, i.e. all clients.

Settings

Most settings are self explanatory, but a few tips may be of help:

Standard Language

You will normally set this to English, the language used in your company. Visual-Adress uses the corresponding language dependant functions based on this setting.

Standard Country Code

Use "GB" for Great Britain (not "UK" for United Kingdom). The value entered here is the default value for new addresses.

Standard Country Dialling Code

Use the new notation, i.e. "+44" for GB. This code will be used for the default country dialling code of new telephone and fax numbers.

Maximum (Number Of) Address Rows

This is the maximum number of rows that Visual-Adress uses to compose the address block.

Note:

Remember that when you change this number, lists and letter templates may have to be adapted accordingly.

Maximum (Number Of) Rows in Combo Boxes

Combo boxes show data from which you may select an entry. In order to limit the number of entries you can add the maximum value here. This setting does not influence the number of concurrent visible entries.

File Extension for User Pictures

Here you enter the bitmap type of the picture and signature you can assign to all users in the user administration. Possible types are .gif, .tif, .bmp, .jpg etc.

Unique Address Numbers

Although Visual-Adress disposes of a unique internal key (RecordID), you may wish to maintain a unique visible address number as well. If yes, activate this option.

Use Street and Post Office Box in the Address Block

By default, a post office box address overwrites the street address. To show both street and post office box activate this option.

Department above the Person in Charge

Option activated

Company
Department
Person In Charge (Contact)
Address

Option not activated

Company
Person In Charge (Contact)
Department
Address

User Home Directory

Instead of having to enter user name and password at every start-up, you can enter a path here, which is formally identical but physically on each user's pc. If this field contains a valid path name, Visual-Adress stores user name and password in this directory.

Font

Select font script "- Western -" or "Central European" to enable the font selection for English/French/German/etc. or any other of the available scripts for other languages.

Telephone Numbers

In order to obtain a uniform display of telephone numbers, use the fields for country and area dialing codes as well as the telephone number correctly. The settings on this register convert the "+" into "00" and separate the 3 telephone number parts with the symbols entered.

Clients

In the *Clients* Register you create, administer and delete clients. Each client consists of a self contained database. All data and documents are being saved independent of other clients. Only one productive client should exist for normal use.

Designation

This is the name that you select when logging in. You can use any sensible name.

Folder

By default the database will be stored in the directory [\\Server\...\Abex6\Data\Folder](#), where (Folder) is the name entered here. The name generated from the designation may be overwritten.

Client Number

The client number is created automatically and cannot be modified.

Database Password

You can optionally assign a database password to every client. This password prohibits anyone from accessing the database via an external application.

External Address Database Active

Visual-Admin contains a number of predefined connections to other databases. You can connect these easily by using the wizard. Other data models are available on request.

Sesam Connection

This is a specific connection to Sage Sesam, allowing you to transfer data to Sesam including the order in which they will be displayed there.

Record Locking on User or Group Level

An owner can be determined for all addresses, note types and tables. All data tables contain an "owner" field. If "entry for all" is entered there, everybody is authorised to modify or delete the record. If a certain staff member or group is entered, only that member or members of that group are authorised. This option is activated by enabling the respective checkbox.

If an assigned staff member leaves the company or someone else is assigned for other reasons, the administrator can transfer the ownership to the new person.

Create a New Client

- While in the *Clients* register go to menu *File > New Client* or click on the *New Client* icon.
- Name the new client. When pressing the  icon, you can enter names in the other languages (French, German and Italian). The folder name is then assigned automatically, using

the client name without blanks. You can however overwrite the folder name. All future entries including the documents will be stored in this folder and its sub-folders.

- Select an empty or an existing client as template. If you select an existing client, deselect the data, that should not be copied to the new client. Then only the database structure will be copied.

Deletion of an Existing Client

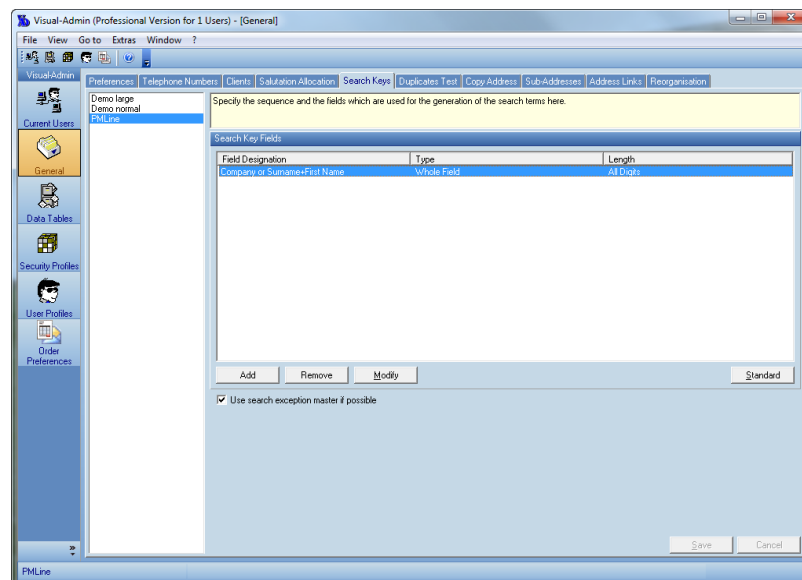
Highlight the client to be deleted and press the *Delete* icon or hit the *Delete* key. The client including all data and documents will be deleted **irrevocably**. It is strongly recommended to make a backup of the client folder first.

Salutation Allocation

These are the basic settings used in conjunction with external applications.

Search Keys

Here you can define how the search key for the addresses is edited. The default length is 15 characters. The default is a special field, either the company name or, if it is empty, surname + first name.

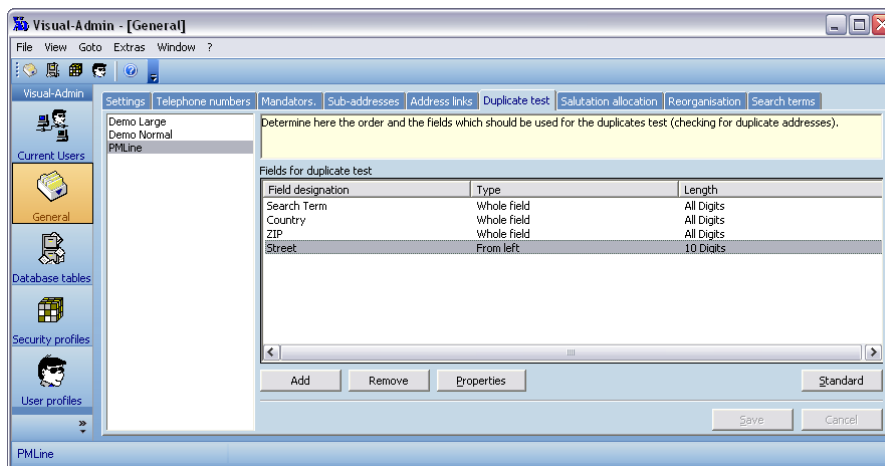


Using *Add* additional fields can be added, using *Remove* they can be removed. *Properties* shows details of the current selection and allows editing. The individual fields can be added completely or limited to a number of characters beginning from left or from right. *Standard* resets everything to the default.

Duplicates Test

In the *Duplicates Test* register you determine which fields or parts of fields will be used to test for duplicate addresses.

To be successful clear rules have to be established regarding how addresses should be entered. Out of experience we know that the same address can be written in dozens of different versions. Duplicates tests only return all (or almost all) existing duplicates, when the address fields are used for the address part for which they were designed.



The buttons *Add*, *Remove*, *Properties* and *Standard* have the same functionality as under Search Keys above.

Copy Address

Here you can add the fields, which should not be copied when copying an address. We suggest adding the field "Address number" here.

Sub-Addresses

In the *Sub-Addresses* register you determine which fields will be copied from the main address to the sub-address. By default all fields except data regarding the person are selected.

This definition is being used when you click *Copy as Sub-Address* in Visual-Adress.

Address Links

In the *Address Links* register you determine which fields will be modified in the sub-addresses when you modify them in the main address. Only fields having identical values before the modification is made will be updated.

Reorganisation

Repair

You may sometimes have to repair the database. This can happen when someone shuts down his computer without first exiting Visual-Adress or when a network connection is lost while a user was editing a record. In this case click the *Repair* button to rebuild the database and all indices. Note that a temporary copy of the database is made, requiring additional disk space of the same size as the original database.

Detach

If a main address has been deleted without first releasing the links to sub-addresses, links leading nowhere may remain. This function checks all links and deletes invalid ones.

Delete (Notes and Documents)

Deletes all notes and documents for which the originally assigned address is missing.

Optimise

With time the database grows disproportionate to the number of entries, since deleted records physically remain in the database. While performance is hardly increased, the size of the database can be kept smaller. Perform this function monthly and after every repair.

Data Tables

Introduction

Due to the use of Access databases the functionality of Visual-Adress can be extended in an almost unlimited way. You can create new tables with new input forms, add or modify fields, link external data, etc.

Visual-Adress contains three different kinds of tables:

- Address table
- Notes tables (internal and external)
- Master tables (internal and external)

Technically these tables are identical but their function is different. The address table is the main table with up to 255 individual fields. To improve the overview, the various fields can be assigned to up to 20 registers. 43 fields are predefined and cannot be deleted. The remaining fields are at your free disposal. The notes tables contain additional data that is usually linked to an address. Notes can be anything you like as well as special tasks and dates tables. Master tables contain data, which is used in drop-down boxes as predefined values for fields in other tables.

Database Design

Preparation

Although a database can be modified anytime later, some advance thoughts on what objectives shall be reached should be made beforehand. Draft the tables, fields and relations you need before creating or modifying them in Visual-Admin.

Create / Edit a Database



To create a new database see chapter "Clients".

To edit a database select the *Data Tables* work area and go to menu *File > Switch Client* to select the appropriate database.

Create / Edit Tables and Form Design



Internal Tables

The procedure to add/edit tables and design the input forms is identical for all 3 types of tables.

- Go to menu *File > New Internal Table* or click on  to create a new master table;
or
go to menu *File > New Internal Note Type* or click on  to create a new note type.
- Enter a designation for the table. The internal name is created based on the designation.

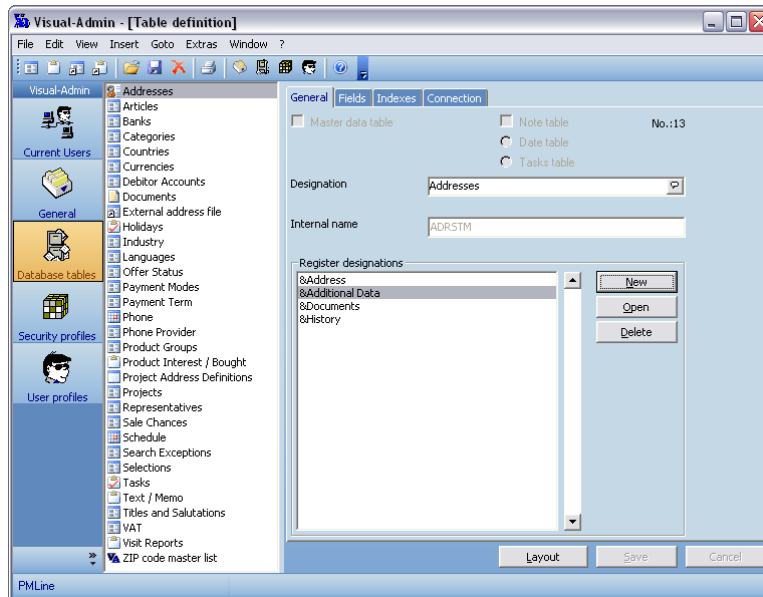
External Tables

In order to avoid redundant entry of data that already exists elsewhere, you can link external tables.

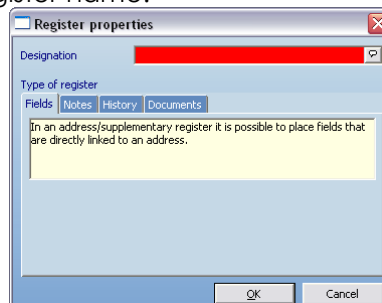
- Go to menu *File > New external Table* or click on  to link an external master table;
or
go to menu *File > New external Note Type* or click on  to link an external note type.
- A wizard will guide you further.

Registers

If you need many fields they should be distributed on several registers to improve the handling thereof. To add a new register:



- Select the appropriate table.
- Select the register below which you want to add a new register (later rearrangement of the registers is not possible).
- Press the New button.
- Enter a short, distinctive register name.



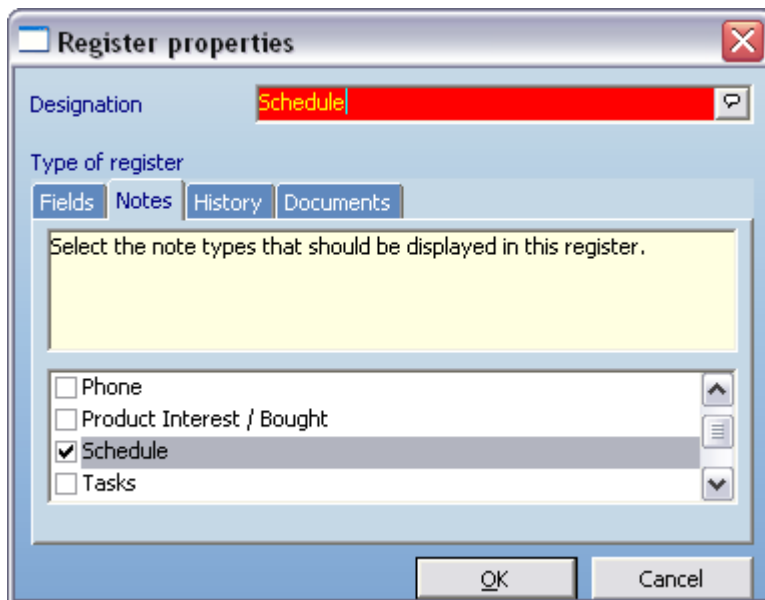
Use as Address Register

If you want to use the register for additional address table fields, press OK after entering the designation.

Use as Mirrored Notes Register

All note types are always shown in the "History" register. To show important note types in a separate register proceed as follows:

- Select the table "Addresses".
- Create a new register as described above.
- Click on the Notes register.



- Select the note types you want to show on this register.

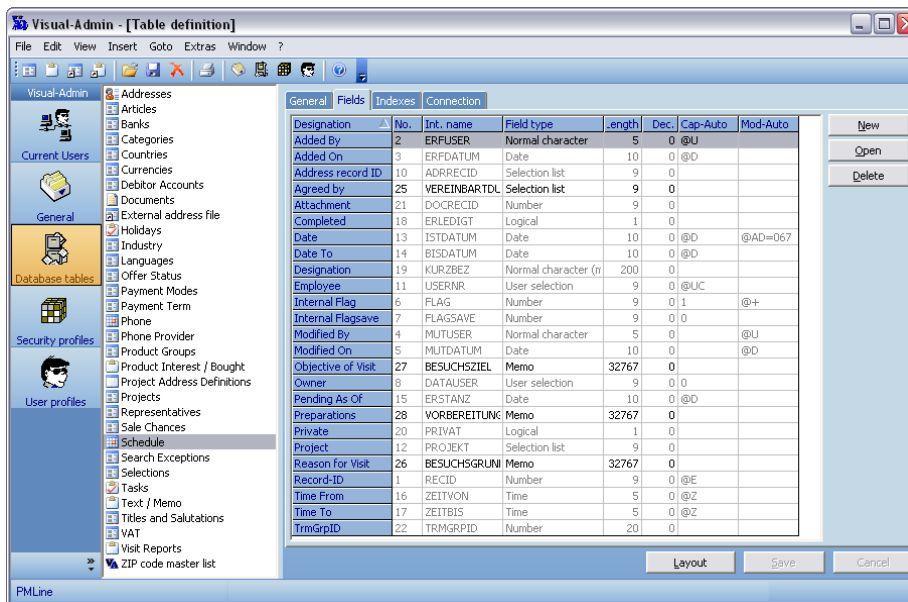
Registers on Note and Master Tables

To create additional registers on note and master tables, select the appropriate table. Then proceed as for "Use as Address Register" above.

Database Fields

The fields are being created, edited and deleted on the *Fields* register.

Attention:
Fields in grey cannot be deleted and their data type cannot be changed, since these fields are compulsory for the application to work.



Visual-Adress contains many different field types with specific uses:

Field Type	Description	Field size (digits/characters) default
Arithmetic Field	Calculates a value from other fields. Possible operations are - Addition and subtraction	-

Field Type	Description	Field size (digits/characters) default
	- Multiplication and division - Percentages - Exponentiation	
Date	Date	-
Depending on selection	When selecting an entry in a selection field, the value of the depending field is shown here.	-
E-mail address	E-mail address	50
Fax number	Fax number excluding country and area codes	20
Internet address	Internet URL http:// or https://	60
IP-Telephone	VOIP telephone code or number (currently supports Skype)	40
ISR	Swiss payment slip reference number	53
Logical	Boolean value (true/false or yes/no)	1 (fix)
Memo	Large text field	32767 (fix)
Multiple choice	Selection list allowing multiple choices, e.g. used to assign several categories to an address	26
Normal character	Standard text field	25
Normal character (multilingual)	Standard text field for 4 languages	200
Number	Integer or decimal number	9/0
Number filled with zeros	Integer or decimal number of the form 0000000000	10/0
Picture	Bitmap file	-
Selection input	When a value is entered, it is compared to a master table. If no match is found, a search form opens	-
Selection list	The possible input values are selected from a master table generated previously	9 (fix)
Telephone number	Telephone number excluding country and area code	20
Telephone/fax country code	Country code in the form "+99"	-
Telephone/fax area code	Area code in the form "0999"	-
Time	Time in the form "hh:mm:ss"	-
Uppercase character	Text field converted to all uppercase	20
Uppercase character (multilingual)	Text field converted to all uppercase for 4 languages	80
User selection	Selection list containing the licensed users	-

Adding/Editing Fields

- Select the table to modify and click on the register *Fields*.
- To add a new field press *New*.
- To edit a field either double-click on the field or click on the field and press *Open*.
- Enter a field designation (optionally for 4 languages).
- The "Internal field name" will be generated automatically.
- Select the "Field type".
- Depending on the field type enter "Field length", "Decimal places" and "Alignment" (for decimal numbers the field length includes the dot "." and the decimal places).

Note:

Details on the setup of the various field types may be found in the Annex.

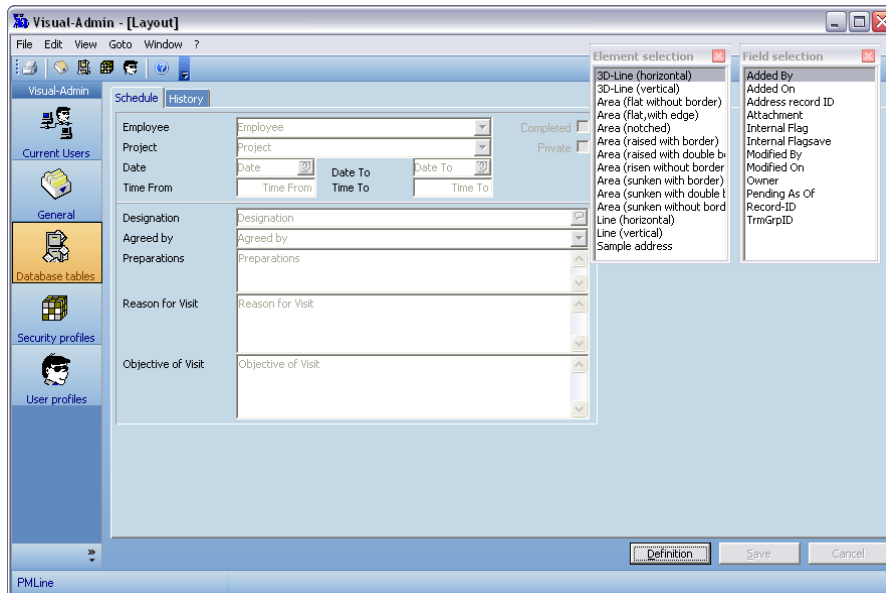
Form Layout

- On the *Fields* register press *Layout*

Important:
Adjust the window size to the minimum screen size of your users monitors before starting the layout.




The layout contains two floating windows containing graphical elements and the fields which have not yet been placed on the form.

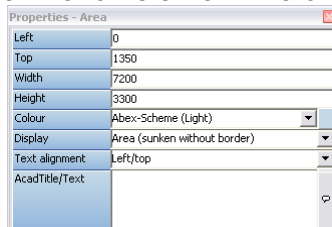
The layout always shows a single record input form. For notes tables there is a second register *History* allowing you to design the notes summary for the *History* register in Visual-Adress.




The form contains an invisible grid. All elements and fields will align to the nearest grid point outside of the upper left corner.

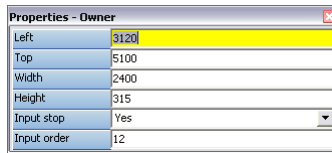
Graphical Elements:

- To place a graphical element on the form use drag-and-drop.
- To move the element hover over the element until the cursor changes to . Then click and drag the element.
- To size the element hover over the border until the cursor changes to  or . Then click and drag the border.
- To remove an element, click-and-drag it back to the floating window.
- Right-click an element to open the properties window. Here you can adjust the size, the colour, the type, the text alignment for an element title and add a title to the element.



Fields:

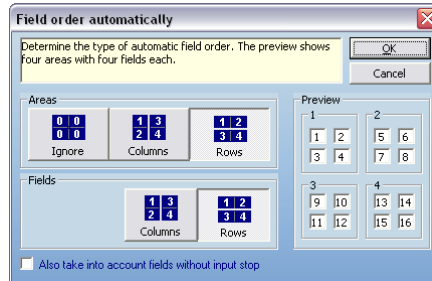
- To place a field on the form or inside a graphic element use drag-and-drop. Note that the field name will be inserted to the left of the field.
- To move either the field name or the field itself hover over the field until the cursor changes to .
- Sizing a field is identical to sizing a graphical element.
- Right-click a field to open its properties window.



- Select No for "Input stop" if you don't want the cursor to stop in that field when tabbing from one field to the next.

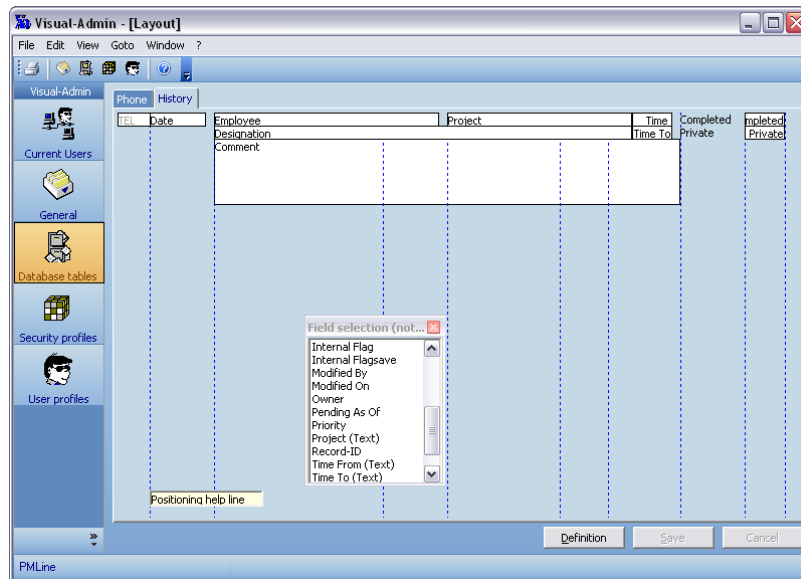
Element and Field Order:

- Go to menu *Edit > Field Order Automatic...*



- Select the order for area elements and fields and then press OK.
- To set the order manually go to menu *Edit > Field Order Manual*.
- Right-click the field and overwrite the "Input order" value.

History Layout for Notes:



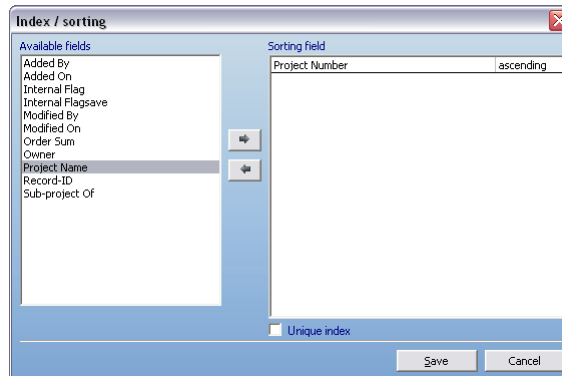
This form contains some positioning help line to assist you in creating similar layouts for all note types. Only add the main fields here, since the history is meant to locate notes quickly. Double-clicking a note in Visual-Admin opens the single record form with all the information.

- Again, use drag-and-drop to insert new fields on the form.
- Dragging the same field again inserts its name.

Indexes

Indexed fields help to speed up searching. Every field that you expect to search frequently should therefore be indexed.

When a new table is created, Visual-Admin automatically generates the primary (+ some other) indexes. The primary index cannot be modified or deleted in the address table. It should not be modified or deleted in other tables.



Adding an Index:

- To add an index click on the *Indexes* register.
- If you want to allow only one occurrence of a value, activate "Unique index".
- Select a field to add to the new index.
- Click the right arrow to add the field to the index.
- Select the sort order (ascending or descending).
- To build a combined index, add further fields.
- Press *Save*.

Editing an Index:

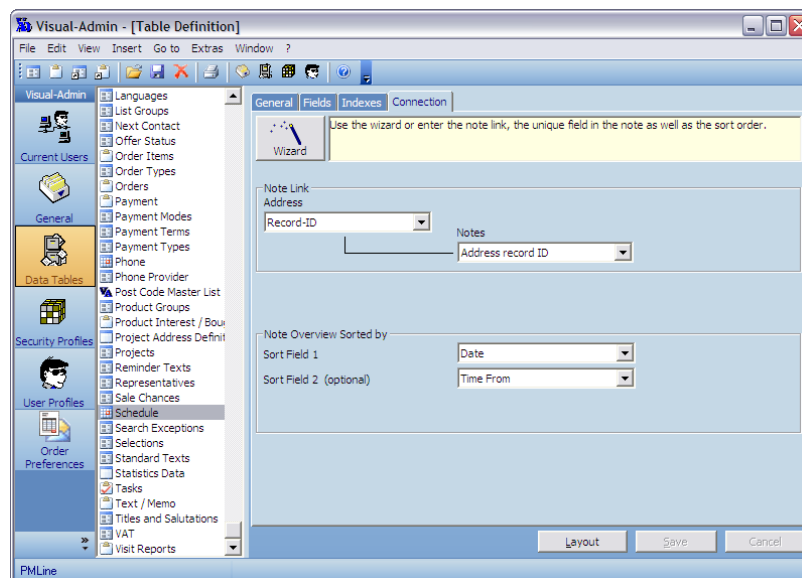
- You cannot edit an index. Instead first delete and then recreate it.

Deleting an Index:

- Select the index and press the *Delete* button or hit the [Delete] key.

Connection

Select the *Connection* register to connect notes to the address table.



- To connect the notes table to the address table either use the wizard

Or

- Select the field in the address table. Usually you will use the unique "Record-ID".
- Select the corresponding field in the notes table. Usually you will use the "Address record ID"
- Select "Sorting Field 1".
- Optionally select "Sorting Field 2".

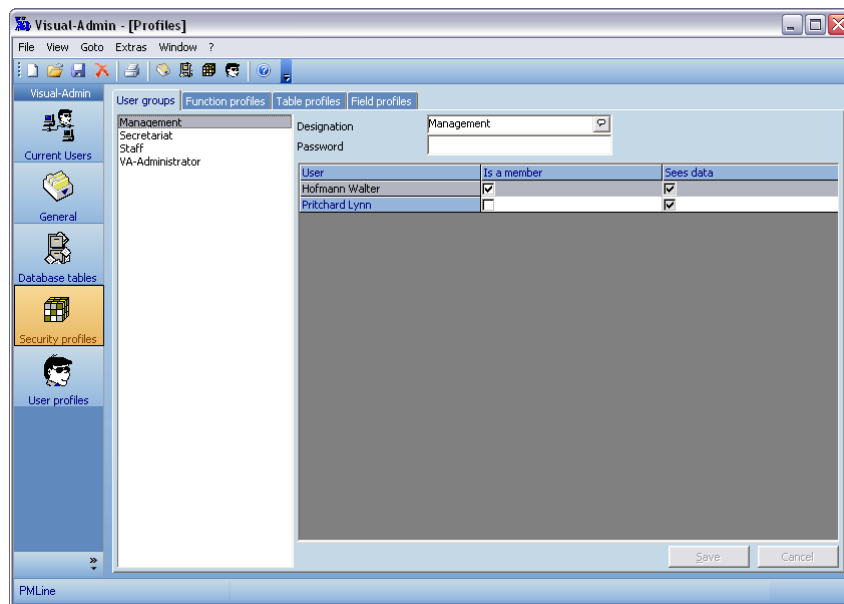
Security Profiles

Introduction

Here you define the user groups, who belongs to which user group(s) and function, table field and options profiles.

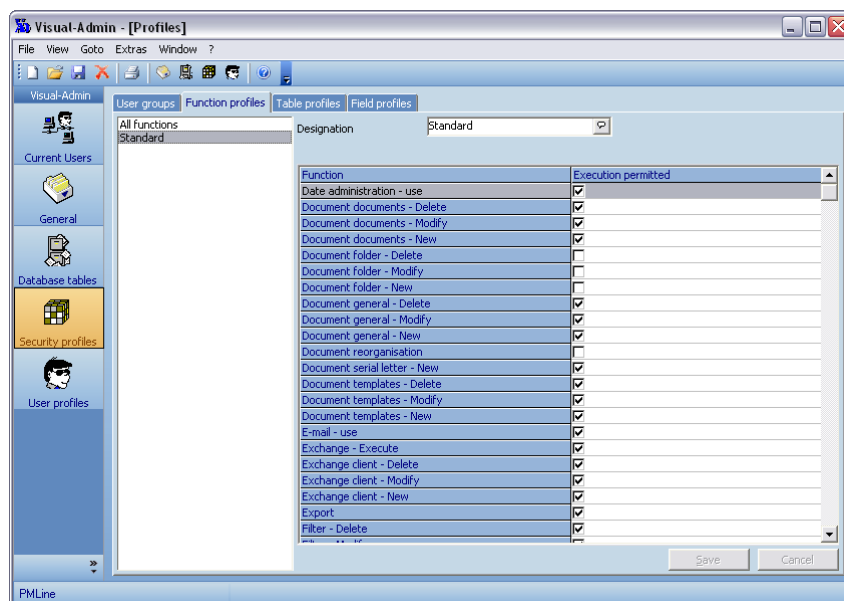
User Groups

- To add a new user group click on the *New* icon go to Menu *File > New User Group* or hit [CTRL-N].
- Enter a designation and optionally a password.
- In the user list assign the members. A member may belong to several user groups.
- If "Can always view all data" in the user profile has been deactivated, you can activate "Can View Data" per user and user group.



Function Profiles

You can define for each user group, which functions may be executed. "All functions" and "Standard" are predefined.



- To add a new function profile click on the *New* icon, go to menu *File > New Function Profile* or hit [CTRL-N].
- Select the function profile.
- Activate or deactivate the execution permission.

Table Profiles

Define which functions may be executed on table level:

- Access to master data menu
- Read
- Add/insert (Enter)
- Edit
- Delete
- Access to note registers

- To add a new profile click on the *New* icon, go to menu *File > New Table Profile* or hit [CTRL-N].
- Select the table profile.
- Activate or deactivate the execution permission.

Later assign these profiles to the user groups or users respectively.

Field Profiles

Define which functions may be executed on field level:

- Visible – field is displayed
- Modifiable – field may be edited
- Clienty – field has to be filled

The handling of this form is identical to the “Table Profiles”.

Option Profiles

Here you can define profiles which refer to the various registers in the menu “Tools > Options” in Visual-Adress.

If a user is not allowed to change the values of a register, he adopts the settings of the administrator. The administrator settings are being used as a template for the other users.

User Profiles

Introduction

Here the user and password administration and authorisations for all Visual-Adress modules take place. All function, table, field and option profiles are assigned in this work area.

General

As long as there are unused licenses, new users may be added. If the maximum number of users is reached, a warning is issued. For additional users additional licenses would then have to be purchased.

To add a new user

- Go to menu *File > New User*, click the *New* icon or hit [CTRL-N].
- Enter first name, surname, user ID (used for login), a password and an abbreviation (used to track user activities).
- Select a colour (used for quick identification in the calendar views).
- Select the dialogue language.
- Select the primary client of the user.

Sender

Enter address data of the user here.

Photo/Signature

Enter a photograph and a scanned signature here. Note that the type of picture file has to be pre-defined in the *General* work area, register *Settings*.

User Groups

- Select the user group(s) to which the user belongs.
- Unless "Can Always View All Data" is activated, select the user group(s) for which the user is allowed to see the data.

Authorisations

- Select applicable user group, function profile, table profile, field profile and options profile.
- Press *Save*.

Annex: Fields Explained In Detail

Field Type	General	Selection Field	Selection Filter	Automatism	Formula
Arithmetic Field	Designation (Internal field name) Field length Number of decimals Alignment Rounding	-	-	-	Build a formula by calculating the field value from other fields using arithmetic functions
Date	Designation (Internal field name) Alignment	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Depending on selection	Designation (Internal field name) Field length Number of decimals Alignment	Use the wizard Or Select the data table (usually the pre-selected table) Select the selection field Select 1 or 2 fields to be displayed in the master table	Use the wizard Or Select the field which contains the filter value Select on which field the filter should be used	-	-
E-mail address	Designation (Internal field name) Field length Alignment	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Fax number	Designation (Internal field name) Field length	-	-	Default country code Default area code (if not standard)	-
Internet address	Designation (Internal field name) Field length Alignment	-	-	Default value from a selection of system values or a manual input value - for new record for edited record	-

Field Type	General	Selection Field	Selection Filter	Automatism	Formula
ISR	(only used in Switzerland)				
Logical	Designation (Internal field name) Alignment	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Memo	Designation (Internal field name)	-	-	Default value from a selection of system values or a manual input value - for new record Special: Updates a second field after input	-
Multiple choice	Designation (Internal field name) Field length Alignment	Use the wizard Or Select the data table (usually the pre-selected table) Select the selection field Select a code designation	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Normal character	Designation (Internal field name) Field length	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Normal character (multilingual)	Designation in 4 languages (Internal field name) Field length			Default value from a selection of system values or a manual input value - for new record - for edited record	-
Number	Designation (Internal field name) Field length Decimal places Alignment			Default value from a selection of system values or a manual input value - for new record - for edited record	-
Number filled with zeros	Designation (Internal field name) Field length	-	-	Default value from a selection of system values or a manual input value	-

Field Type	General	Selection Field	Selection Filter	Automatism	Formula
	Decimal places Alignment			- for new record - for edited record	
Picture	Designation (Internal field name)	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	Picture: See below
Selection input (displays a selection, when the input is not found)	Designation (Internal field name)	Select data table Select field for input and testing	Use the wizard Or Select the field which contains the filter value Select on which field the filter should be used	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Selection list (always displays a selection)	Designation (Internal field name)	Use the wizard Or Select the data table (usually the pre-selected table) Select the selection field Select 1 or 2 fields to be displayed in the master table	Use the wizard Or Select the field which contains the filter value Select on which field the filter should be used	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Telephone number	Designation (Internal field name) Field length	-	-	Default country code Default area code (if not standard)	-
Telephone/fax country code	Designation (Internal field name) Field length	Use the wizard Or Select the data table (default "Addresses") Select the field in the data table (default "Addresses->Country") Select the display field (default "Countries->Country dialling code")	Use the wizard Or Select the field which contains the filter value Select on which field the filter should be used	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Telephone/fax prefix (area)	Designation (Internal field name)	Use the wizard Or	Use the wizard Or	Default value from a selection of system values or	-

Field Type	General	Selection Field	Selection Filter	Automatism	Formula
code)	Field length	Select the data table (default "Addresses") Select the field in the data table (default "Addresses->ZIP") Select the display field (default "ZIP code master list->Area code")	Select the field which contains the filter value Select on which field the filter should be used	a manual input value - for new record - for edited record	
Time	-	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Uppercase character	-	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
Uppercase character (multilingual)	-	-	-	Default value from a selection of system values or a manual input value - for new record - for edited record	-
User selection	Designation (Internal field name)	-	-	Default user - for new record - for edited record	-

The "Picture" field uses the *Formula* register now named *Picture*. Here you can set various values to adjust the picture to the available space on the form.

