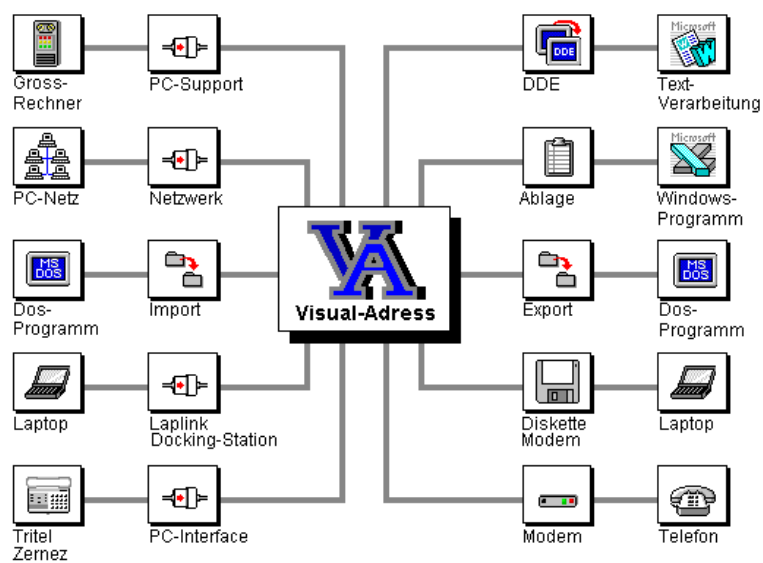


# User Manual

## Visual-Adress 6.9



01 February 2010

Abex Software AG

## Visual-Adress 6.9

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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-Adress itself.

### 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
- Post code 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.

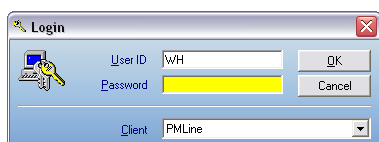
## Visual-Adress Basics

Visual-Adress will support you in all areas of address management, marketing, sales and project work. Visual-Adress can be used across the whole organisation: By the secretary to update addresses, by the dealer to store his reports of customer visits and by the sales and marketing manager to access data. In order to optimise the way Visual-Adress is used, it has to be configured correctly. Often the responsibility for configuration is in the hands of the marketing department or an employee specially trained in Visual-Adress. Individual users need to be informed about the sections they will be using: What is possible, what conventions have been agreed on, which data are meaningful and necessary. Actual operation then becomes a child's play and always follows the same structures.

## Start-up And Personal Settings

### Start-up

The entire Visual-Adress suite is subject to a strict user administration. When you start Visual-Adress, you will first be prompted to enter your User ID and Password:



The User ID and Client used the last time Visual-Adress had been opened will already be filled in. Normally, you will just have to enter your password and press OK.

#### Note:

When starting Visual-Adress for the first time and before any users have been defined in Visual-Admin, "User ID" and "Password" remain empty.

### 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 (addresses, projects, notes, 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.

Alternatively go via menu *View > Toolbars > Customise Toolbar...*

### Task Bar

The task bar at the left side of the screen can be displayed using large icons, small icons or as a tree view. Change the views using a right-click in the task bar area or go via menu *View > Taskbar*.

### Standard View

(Using large or small icons)

**Addresses:** After starting Visual-Adress you will always be in the address work area. Here you add, edit, print, import, export all data.

**Date Administration:** Visual-Adress contains a sophisticated calendar, using different colours per user and showing detailed address-related data.

**Projects:** In the projects work area you can add and edit projects and assign addresses with their notes and documents to them.

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**General Documents:** In the document administration work area you may file general documents which are not related to addresses.

**Master Data:** In the master data work area you will find all lookup tables necessary to record addresses or other entries.

**Email:** If you have a Mapi32-compatible mail system on your computer like Exchange or Outlook, you may read and write your emails directly in Visual-Adress.

**Internet:** This button opens Internet Explorer within Visual-Adress.

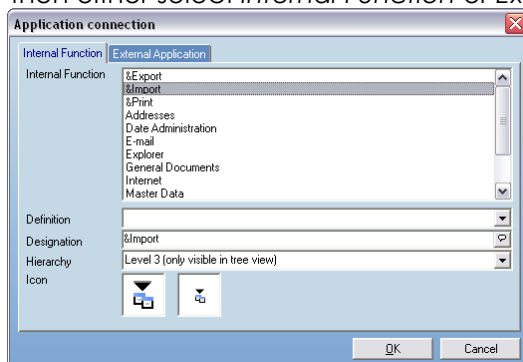
**Explorer:** This button opens Explorer within Visual-Adress.

### Tree View

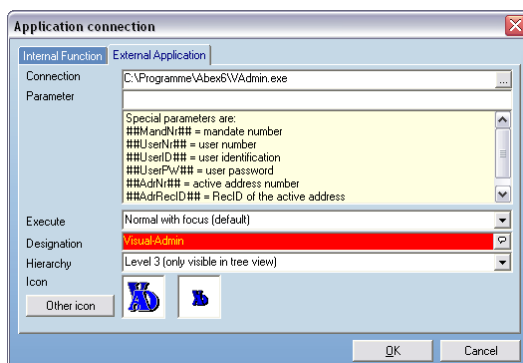
The tree view can show up to 3 hierarchical levels, level 1 corresponding to the standard view.

In order to make Visual-Adress even more flexible, the task bar may be supplemented by additional Visual-Address internal functions or by external applications.

**To add functions:** Either right-click in the task bar area and select "Add Link" or go to menu View > Task bar > Add Link. You may then either select *Internal Function* or *External Application*:



- Internal Functions: Select any of the available functions, one of the corresponding definitions where available, overwrite the designation, change the hierarchy level if necessary and click "OK".
- External Applications: Click on the button at the right of the field "Connection" and select the desired application (".exe" or ".com" file). Then select an "Execute" setting from the popup list, change the hierarchy level and select a different icon if necessary. Click "OK" to add the application to the tree view.



**To add an application group:** Either right-click in the task bar area and select *Add Group* or go to menu View > Task bar > Add Group. Enter a designation, select the view and press OK. You can add internal functions or external applications as above.

**To delete links and groups:** Right-click in the task bar area and select *Delete Link* or *Delete Group*.

### Zoom

Menu View > Zoom... opens a new form which allows scaling of all forms and their elements according to your preferences.

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### Options

- Go to menu *Extras > Options ...* to set up your personal preferences.

### General

Select some settings concerning letter salutations, search terms, searching, table views and browser. Version 6.8 added three new settings:

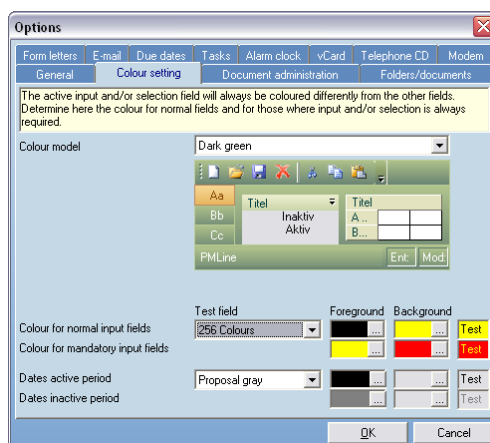
- Show "Go to" arrow for address dropdown lists
- Show "Go to" arrow for (other) dropdown lists
- Show "Go to" arrow for project selection

These options provide a direct access to the master tables referenced in the dropdown fields.

### Colour Setting

The user interface of Visual-Adress has been adapted to the newer Microsoft Windows® and Office® versions. You may however change it according to your preferences by opening the menu *Extras > Options, register Colour Setting*.

You may select between different colour models as well as define the colours for normal and compulsory input fields:



### Document Administration

Select the fields displayed in the table view. Double-click field names on the left part of the window to add them to the display or select them and press the right arrow. Fields will be inserted above the one selected on the right part. Double-click field names on the right part to remove them or select them and press the left arrow.

### Folder/Documents

Settings for documents: Follow the on-screen instructions.

### Serial Letters

Pre-selection for control file for serial letters.

### Email

Settings for Outlook and email handling: Follow the on-screen instructions.

### Email Attachments

Settings for saving/removing of attachments and "own files/pictures".

### Dates

Some default settings for the display of date related notes.

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### **Tasks**

Some default settings for the display of tasks.

### **Alarm Clock**

Activation of the alarm clock and settings.

### **vCard**

Assignment of Visual-Adress fields to vCard fields.

### **Telephone CD**

This feature is currently only supported for the Swiss Twixtel CD.

### **Modem**

Select and set your modem here, if your hardware allows you to dial a telephone by using your modem. For Modem 2 "Skype" must be selected, if you are using Skype for internet telephony, even if you connect to the internet via broadband.

### **SMS/Pager**

Settings to send SMS and Pager messages from within Visual-Adress.

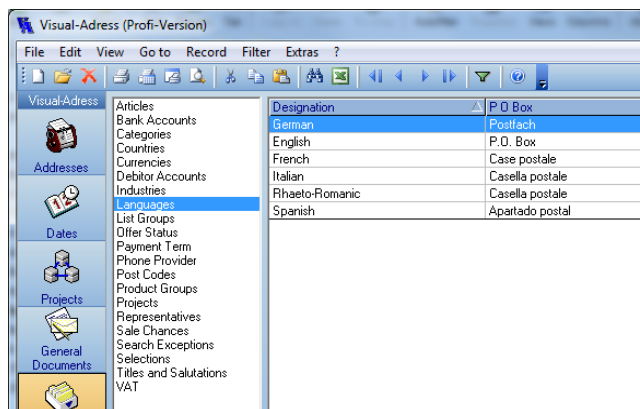
### **Journal**

Definition of entries into the Journal.

## Master Data

### Introduction

The Master Data contain tables serving as drop-down lists when adding or editing addresses, notes or other master tables.




The following tables are required by Visual-Adress:

- Titles & Salutations
- Languages
- Post Codes (Zip Codes)
- Countries
- Search Exceptions
- Phone Provider

All other tables are customer specific and may be modified or supplemented by additional tables in Visual-Admin.

The tables may be sorted in ascending or descending order by clicking repeatedly on a field name header. Clicking on an alphabetic tab on the right side of the table (appearing after having clicked on a field name header) selects the first entry starting with the letter selected.

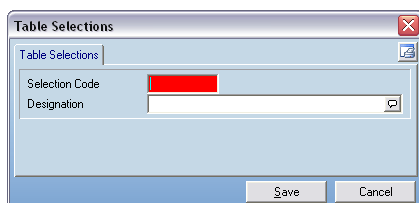
The buttons with the green arrow  which you will find to the right of dropdown fields open the corresponding master data directly. These buttons can be hidden by deselecting the corresponding option (Menu *Extras > Options, General*).

### Add, Edit And Delete Master Data

**Note:**

Adding and editing of master data should be reserved to a few key users. Careless modification or deletion of master table records may have unpredictable consequences on dependent data.

Many master tables just consist of identification and description fields. Often, the identification is entered automatically.



**Example Table Selections:** Click on *Master Data*, then on *Selections*. Then click on the *New* icon or right-click anywhere in the table area and select *New*. You may now enter a new selection code (up to 4 digits, using A to Z and/or 0 to 9, and a designation).

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### Note:

To the right of many Designation fields there is a small bubble icon. Wherever you see this icon in Visual-Adress you may enter the designation in up to 4 languages, currently English, French, Italian and German.

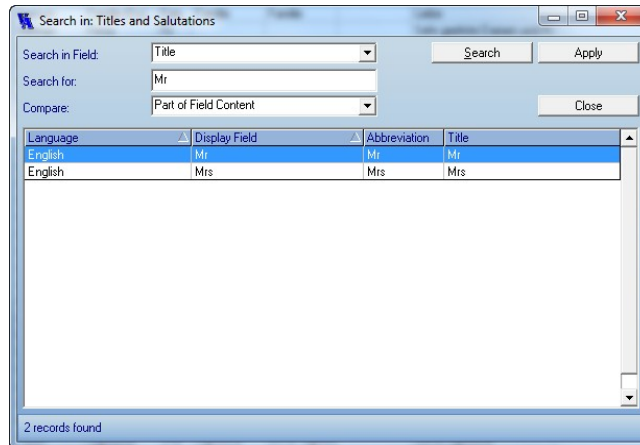
Existing records may be modified by double-clicking them.

Right-click a record and select *Delete* or select a record and click on the *Delete* icon in the menu bar to delete a record. Click Yes to confirm the deletion.

## Search Master Data

**Example Table Titles & Salutations:** Click on *Master Data*, then on *Table Titles and Salutations*. Now press function key *F3*.

- Select the field you want to search
- Select the term you are searching
- Select the field part you want to compare
- Click "Search"



- Select the desired record in the results table
- Press *Apply* to jump to the corresponding record in the table.

## Addresses

### Adding and Editing Addresses

After starting up Visual-Adress you are in the address work area (default setting). Otherwise click on the *Addresses* icon in the task bar.

- To add a new address click on the “New” icon or press *CTRL-N*.
- To edit an existing address click in the field you want to edit and start typing.
- Some fields already contain default values, e.g. **Language** = English, **Title** = Mr, **Country** = GB, provided this has been defined accordingly in Visual-Admin.
- The available selection in the **Title** dropdown list depends on the language selection. The title also determines the value automatically entered in the field **Salutation** as soon as you enter the field or save the address.
- **Country / City / Zip**: Enter the data for the street address in these fields. When entering the code in the field “Zip” first, you either immediately get the city or a new form with a selection of cities with that code opens. Note that the postal codes for the United Kingdom are currently not available<sup>1</sup>.
- **P O Box / City / Zip**: Enter “P” for an unknown P O Box number or the number in the first field. If city and/or zip are different from the street address, enter them here. Any entries in these fields will overwrite the street address.
- The **Search Term** is derived from the first 15 characters of the company name or surname and first name for private persons. It is generated when you enter the field or when you save the address. For certain types of addresses starting with a common word like in banks, communities, starting with “British”, etc. sensible guidelines have to be developed and adhered to.
- When you overwrite a generated search term by your own entry, your new search term may be added to the Search Term Exceptions and then be used instead of the generated search term for future addresses, provided the entry “Automatically adjust search term if corresponding fields were changed” in menu *Extras > Options, Register General* has been deactivated.

<sup>1</sup> The postal codes for UK have to be licensed separately and could be made available on request.

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- Phone and fax numbers should always be entered with full prefix in the second field and local number with blanks as separator in the third field. Visual-Adress will then display the number correctly in the reports. The country code is generated automatically from the value entered in **Country**.

### Note:

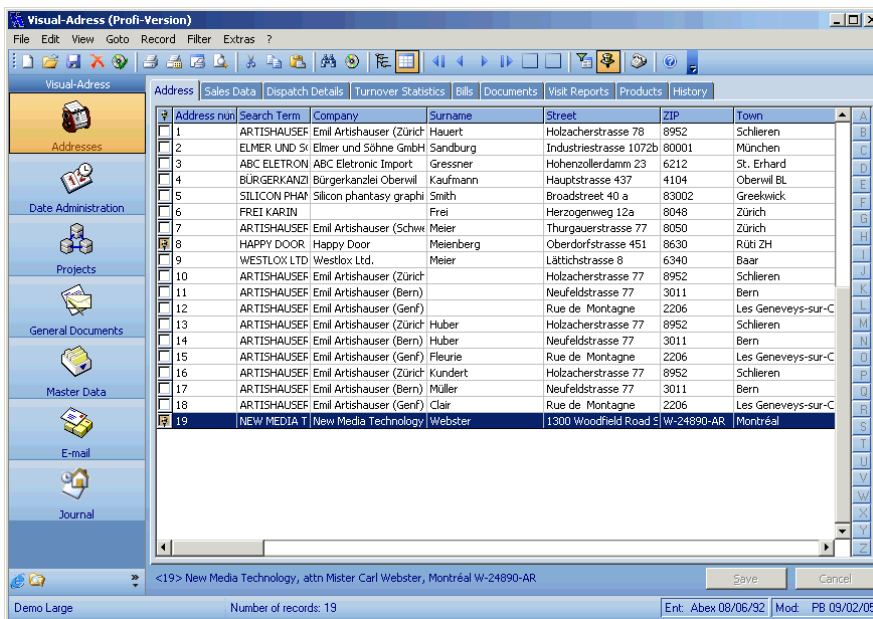
By default Visual-Adress uses "GB" for the United Kingdom. If you prefer to use "UK" instead, change the Country ID in the master table *Countries* for the United Kingdom accordingly.

## Address Add-on Forms

Every Visual-Adress table may contain up to 255 fields. In order to sustain easy operation, the main form only contains address data whereas additional information may be entered on add-on forms on up to 20 registers. These forms are completely user configurable in Visual-Admin.

## Address Table

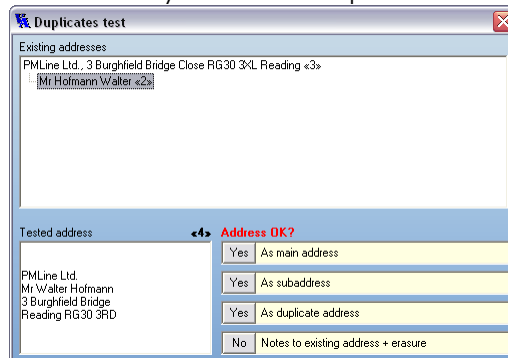
Clicking on the  icon or pressing CTRL-A toggles between single address view and table view.



Left-clicking a field name sorts the table by that field. Right-clicking a field name opens the table definition form, that allows you to select the fields to be displayed in the table view. When the *Display Markings* checkbox is activated, the table contains the markings column, which allows you to mark/unmark addresses directly. The regular fields cannot be edited in table view.

## Testing For Duplicates

Before saving an address it is automatically tested for duplicates:



In case a duplicate address is found, you then have four options:

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- **As Main Address:** The existing address will be linked to the new address as sub-address
- **As Sub-Address:** The new address will be linked to the existing address as sub-address
- **As Duplicate Address:** Both addresses will be saved and not linked together
- **Do Not Add New Address:** The new address will not be saved.

The fields, that are being compared, can be defined in Visual-Admin.

## Searching Addresses

To quickly find addresses you have several options. The search supports the use of wildcards:

Character	Meaning	Example
?	Any character at position of '?'	S?mple (finds sample, simple)
*	Any number of characters	S*
>	Greater than	>S
<	Smaller than	<S

## Extended Search Form

The extended search form may be accessed by

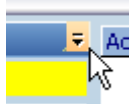
- Pressing the binoculars icon in the menu bar
- Going to menu *Edit > Search Address*
- Pressing *CTRL-I*

Address	Search	Company	Surname	ZIP	City
201	CHEMC	Chemengineering AG	Minas	4133	Pratteln
48	CHEMC	Chemengineering AG	Janssen-Tapken	4133	Pratteln
186	CHEMC	Chemengineering AG	Meier	4133	Pratteln
49	CHEMC	Chemengineering AG	Nicolaus	4133	Pratteln
50	CHEMC	Chemengineering AG	Zeiter	4133	Pratteln
51	CHEMC	Chemengineering AG	Stettler	4133	Pratteln
176	CHEMC	Chemengineering AG		4133	Pratteln
52	CHEMC	Chemengineering AG	Binnwerk	4133	Pratteln
53	CHEMC	Chemengineering AG	Floth	4133	Pratteln
54	CHEMC	Chemengineering AG	Link	4133	Pratteln
55	CHEMC	Chemengineering AG	Lenz	4133	Pratteln
56	CHEMC	Chemengineering AG	Latscha	4133	Pratteln
176	CHEMC	Chemengineering AG	Schultebrucks	4133	Pratteln
177	CHEMC	Chemengineering Holding AG		4133	Pratteln
58	CHEMC	Chemengineering Holding AG	Matthys	4133	Pratteln

The search with terms in the upper left part of the form uses "Start of Field", i.e. in above example it will find any address whose search term is starting with "chemgin". Multiple search terms are connected by "AND". In this case the search will return all addresses whose search term starts with "chemgin" and whose city starts with "pratteln". Search with terms in the lower left part of the form uses "Field Contains": The search term may be anywhere in the field.

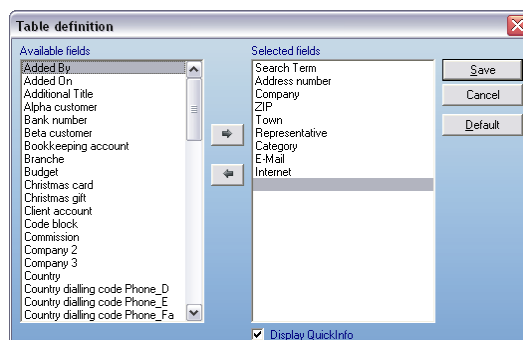
If an address is being selected which does not fall within the active filter criteria, a message will be displayed and the filter may be deactivated.

The fields available in the search form may be determined by clicking the tiny down-arrow



in the heading:

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The fields available in the search results part may be determined by right-clicking in its heading. This will open the same "Table Definition" form.

### Simple Search Form


Double-clicking any field or clicking the field and then pressing "F3" on the address form opens the simple search form. You can then search that particular field using "Whole Field", "Start of Field" or "Field Contains".

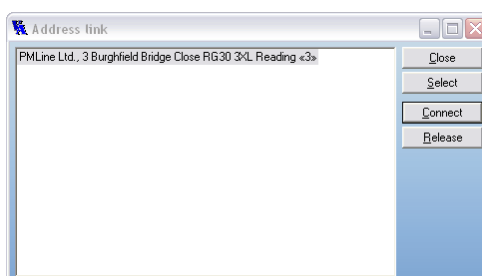
By clicking a dropdown field and then pressing "F2" you can search in the master table instead of in the address table.

### Address Links / Sub-addresses

Normally you will start by entering a company address without any person. You will then add sub-addresses for departments and persons. To do this, enter the main address normally. Then go to menu *Edit > Copy Address as Sub-address*. Many fields will then be copied in the sub-address and you just have to edit the fields which differ from the main address. In the same way you can add sub-sub-addresses etc.

If you already have entered addresses and would like to link them subsequently, proceed as follows:

Click  in the menu bar or go to menu *View > Address Link*.



Pressing *Connect* will open the extended search form as above, where you can now search the address you wish to connect as sub-address. Pressing *Select* or double-clicking an address will jump to the address selected in the background.

When you already have several connections, be sure to first select the main address before pressing *Connect*.

To release an existing connection, select the **sub-address** and press *Release*.

### Deleting Addresses

In order to delete an address go to menu *Edit > Delete* or press the *Delete* icon (the one with the red cross). To be able to delete a main address, first detach all its sub-addresses.

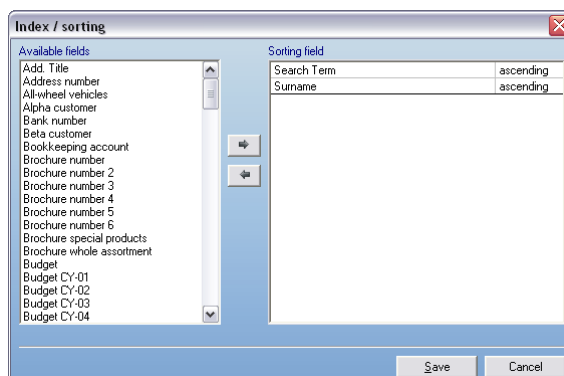
**Attention:**  
When you delete a main address, all associated notes and documents will be deleted as well.

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When you delete a sub-address, you can optionally move the associated notes and documents to the remaining main address.

### Sorting Addresses

To sort addresses go to menu *Record > Sort*, then select one of the predefined entries or build your own by selecting *Individual...* at the bottom of the list.



Add field names in the order you would like to sort the addresses (sort by ... then sort by ... then ...) and save your selection. Fields can be sorted in ascending or descending order.

### Phone, Fax, SMS and Pager

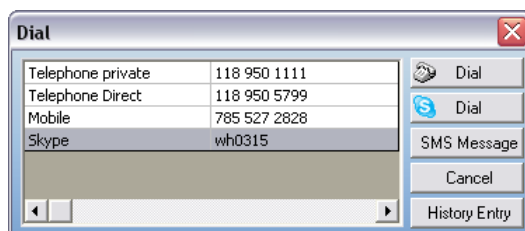
Visual-Adress supports dialling of phones, sending of faxes, SMS and pager messages, provided the required third party hard- and software is installed.

Clicking on the phone icon in a phone number field opens the "Dial" dialogue. Pressing *Select* dials the selected number, pressing *SMS message* allows you to type the message and then send it to a mobile or a pager.

Clicking on the fax icon in a fax number field opens Outlook and inserts the fax address in an email message. In order to send faxes from Outlook Exchange Server is required.

Visual-Adress provides the possibility to use Skype to make phone calls (Skype out) and Skype to Skype calls.

In order to use Skype with Visual-Adress "Skype" has to be selected as Modem 2. Go to *Extras > Options > Modem > Modem 2* and select "Skype (Internet Telefonie-Software)".



## History, Notes

### General

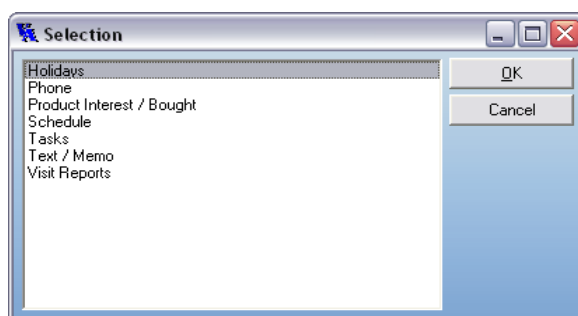
The *History* register contains a complete summary of all activities related to the active address. All notes, dates, tasks and documents are quoted here, sorted by date.

The available note types (up to 20) are being defined in Visual-Admin.

### Note Entries

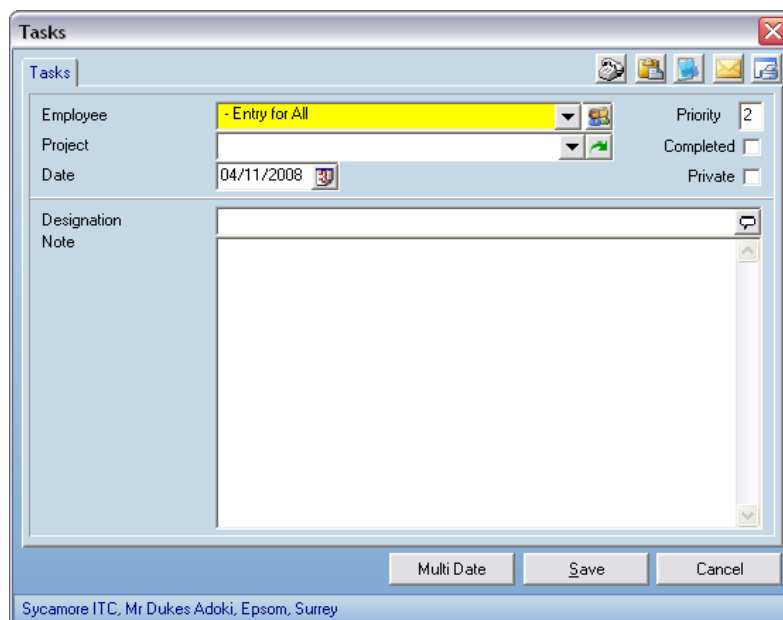
All note types may be added while in the *History* register. Specific notes may be added while in the corresponding *Note* register.

To add a new note either go to menu *Edit > New > New Note*, click on the *New Note* icon or right-click in the empty notes area and select *New Note* from the context menu. When in the *History* register, the following window opens, where you can select the note type.



When in a *Note* register, a new, empty note of the same type opens.

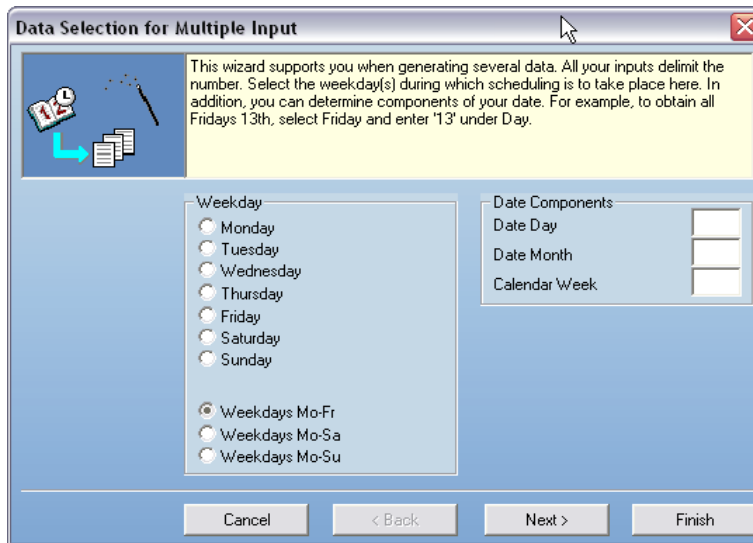
The simplest note is the *Task Note*:



- From the *Employee* dropdown list select the appropriate entry: Entry for all = visible for everybody, a group or a single name
- Select the *Project*
- Edit the date if necessary
- Enter a meaningful designation
- Enter an extensive description

## Visual-Adress 6.9

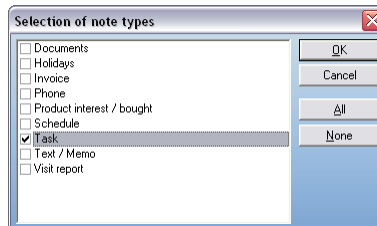
Notes have a "Multi Date" button, allowing to plan recurring events. A wizard guides you through the required steps:



## Note Filters

With a note filter you can select one or several note types to be displayed in the *History* register.

Go to the *History* register and click on the leftmost filter icon in the menu bar or go to menu *Filter > Filter On Note Types*. In the pop-up form select the note types you want to filter out.




Check the tip texts of the other 4 icons for further options.

## Notes of Main and Sub-addresses

Go to menu *View*. There you can select between viewing only note entries of the main address, only the sub-addresses or both.

## Filters, Selections

### Introduction

Visual-Adress lets you create sophisticated filters, using all fields of the database. The demo data contain some predefined filters: Go to menu *Filter > Filter on* or click , then select *All filters* and select a filter from the list. Filters with “??” at the end are parametrised filters, giving you the possibility to make your selection at runtime.

Filters are being used to

- Display selected addresses
- Print lists or labels
- Export data
- Write form letters
- Serial modifications/deletions


#### Important:

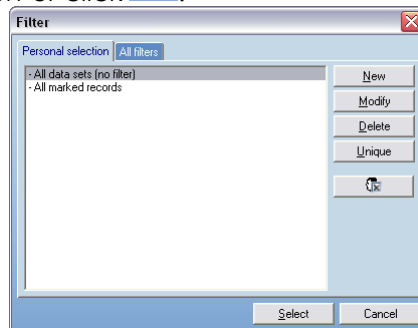
A filter is only active in the context in which it has been switched on. If you have switched on a filter to display selected addresses on the screen, you still have to select a filter (the same or a different one) to print an address list.

Versions 6.8 and newer now offer the “Active Address Filter” when printing lists and labels.

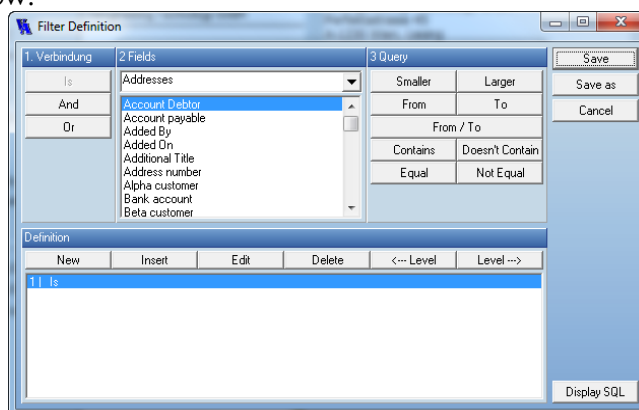
### Filter Definition

#### New Filter

- Go to menu *Filter > Filter on* or click .

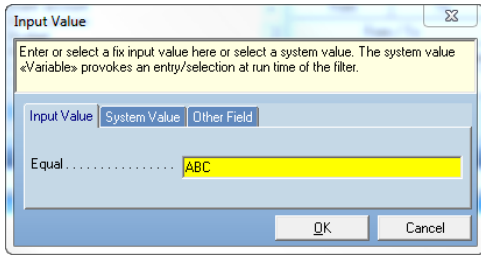


- Press *New* to create a permanent filter definition or *Unique* to create a filter definition you only use once now.



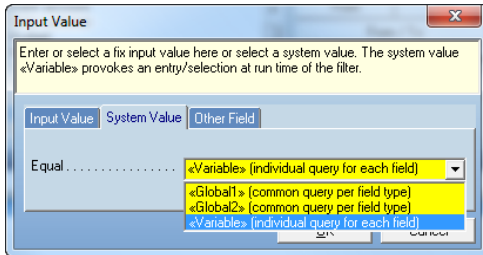
- 2 Fields: Select the table (default Addresses) and the field.
- 3 Query: Select the condition, then enter the value(s)

## Visual-Adress 6.9



Note that you may use wildcards: Equal ABC\* would return all occurrences starting with ABC.

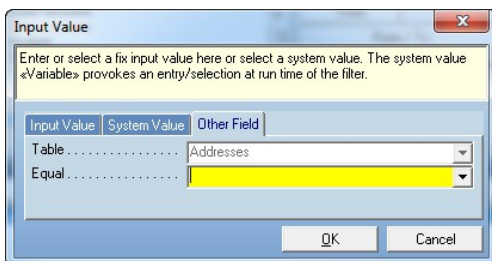
If you select *System value* instead of entering a fixed value, you can then enter the desired value at runtime:



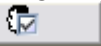
“Global1” and “Global2” replace the fixed value in all occurrences of the variable, e.g. the field “Representative” in all notes of the report “Master sheet”.

“Variable” replaces the fixed value in the specified query only.

The third register offers to compare the field with the value of another field:



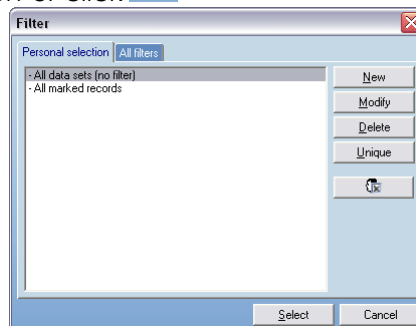
Select the field with which you want to compare the filtered field.

- To add additional conditions press *New* and then either *And* or *Or* in 1 Connection, then go to 2 Fields and 3 Query as above.
- The “Level” buttons allow you to group conditions:  
**(A and B) or C** Either both A and B or C alone must be true  
**A and (B or C)** A and either B or C must be true
- When saving your filter it will be added to register *All Filters*. You may add it to your personal selection by selecting it and pressing 

## Modification of a Filter

Instead of creating a new filter from scratch it's often easier to modify an existing filter.

- Go to menu *Filter > Filter on* or click 



## Visual-Adress 6.9

- Select register *All filters* if you have not added the filter you want to modify to your personal selection. Select the filter and press *Modify*
- You are back in the *Filter Definition* form. You may now add additional conditions (button *New*), modify existing ones (button *Edit*) or insert new conditions between existing conditions (button *Insert*)
- To keep your old filter definition, use *Save As* to assign a new name to the modified filter.

### Application of a Filter

- Go to menu *Filter > Switch Filter on* or click 
- Click on the desired filter
- Press *Select*

To switch off a filter

- Go to menu *Filter > Switch Filter off*.

The menu *Filter > Switch AutoFilter On* sets a permanent filter, that is activated when you start Visual-Adress. *Switch AutoFilter Off* turns the filter off immediately.

### Mark / Unmark

#### Purpose

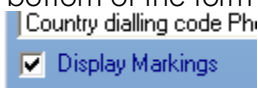
You can mark addresses using the pin icon in the menu bar, by going to menu *Filter > Mark/unmark Address* or by using the shortcut *CTRL-M*. This is especially useful to pick just a few addresses for a form letter. The pin icon turns brown when the active address has been marked. The standard filter "All marked records" can then be used to display only the marked records.

#### Mark / Unmark with Filter

You can mark and unmark addresses using a filter, which enables you to combine filters by going to menu *Filter > Mark with Filter* or *Filter > Unmark with Filter* respectively. You can mark a number of addresses using one filter and then adding further records by selecting another filter. Or you can mark addresses using one filter and unmark some of them using a second filter. Again, the standard filter "All marked records" can then be used to display only the marked records.

You can mark/unmark addresses quickly in the table view:

- Select *View > Table View On/Off*
- Right click in the table heading
- Activate *Display Markings* at the bottom of the form



- Tick the check boxes of the desired addresses.

### Special Filter Variables

When creating a filter, besides assigning the system value "Variable" you can assign some pre-defined system values:

#### Current User

Generally being used to filter the fields "Employee", "Added By", "Modified By", etc.

#### Dates

Uses the current date, the current date +/- days or weeks, etc.

## Document Administration

### Introduction

The document administration combines the powerful functions of office suites like Microsoft Office with Visual-Adress. The document administration differentiates between general documents (documents which cannot be assigned to an address) and address related documents.

General documents may be accessed via the task bar icon *General Documents*, whereas address related documents may be found under *Addresses*, register *Documents*. Address related documents are listed in the *History* register as well.

Both parts are technically identical.

The folder containing all documents can be found in the Visual-Adress data folder, normally [\\Server\...\Abex6\Data\\(Client\)\Document](#), where (Client) is the name of the client database.

#### Important:

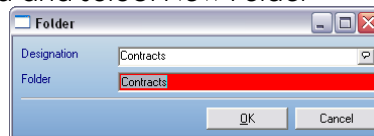
In order to ensure an optimal, consistent and customer related document administration, all documents should be administered via Visual-Adress.

### Operation

#### Creating a New Folder

To create a new folder you can

- Go to menu *Edit > New > New Folder*
- Press the *New Folder* icon in the menu bar
- Right-click in the folder area and select *New Folder*

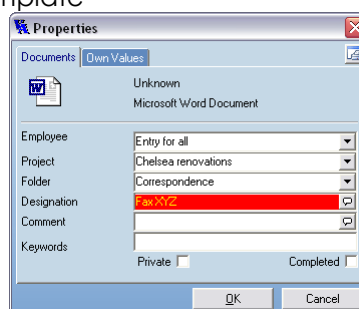


- Enter a designation (remember that you can enter designations in other languages by clicking the balloon icon)
- The folder name will be generated from the designation, but may be overwritten
- Press *OK*
- Use **Drag and Drop** to move and place the folder as a sub-folder of some other folder.

### Working with Documents

#### Creating a New Document

- Select the folder in which you want to create a new document
- Click on the *New Document* icon, go to menu *Edit > New > New Document* or right-click in the document area and select *New... > New Document*
- Select the register *Personal Selection*, *All Templates* or *Empty Templates*  
Note that you can add templates to your personal selection as with the filters
- Double-click the desired template



## Visual-Adress 6.9

Note that the "Properties" form represents a special note type, which may be further enhanced in Visual-Admin.

- Enter appropriate values in the fields **Designation**, **Comment** and **Keywords**. These three fields are used to identify and find a document. The designation will become the filename. If the designation is not unique, a running number will be added to the filename.
- Now click *OK*.  
Based on the template selected, a new document will be created with the appropriate application.
- When you save the document, it will be added to the *History* register, if it is an address related document.

### Adding External Documents

- Select the folder in which you want to create a new document
- Click on the *New Document* icon, go to menu *Edit > New > New Document* or right-click in the document area and select *New... > New Document*
- Click on register *External Documents*, then on *Browse*
- Select the desired document and then press *OK*.

Alternatively you can use Drag-And-Drop to add external documents from the Explorer to the Visual-Adress document administration.

#### **Important:**

When you add external documents to the Visual-Adress structure, you really **copy** the documents, i.e. they still remain at the original location. We suggest deleting the original documents manually after adding them to Visual-Adress.

### Enter Document Link

This function creates a link to the template without opening the document.

### Enter Document Link + Open

Selecting *Enter Document Link* opens the original template in read-only mode and creates a link to the template.

### Enter Document Link + Print

This function opens the template, updates the data fields, prints it and then closes it immediately. At the same time a link to the template is entered.

This is ideal to create standard documents not containing any individual data like

- General accompanying letters
- Newsletters
- Standard offers
- Etc.

### New Serial Letter

This function allows you to write a serial letter using Microsoft Word. This function is explained in detail in chapter "Letter" on page 28.

### Serial Email

This function allows you to send an email to multiple recipients at once. The mail will be sent to yourself with all recipients in the BCC field. Note however that some providers limit the number of recipients for one mail.

- Go to menu *Record > Serial Email ...*
- Select a filter or create a new one.
- The email application will start.
- Write your email.

### Serial Personal Email

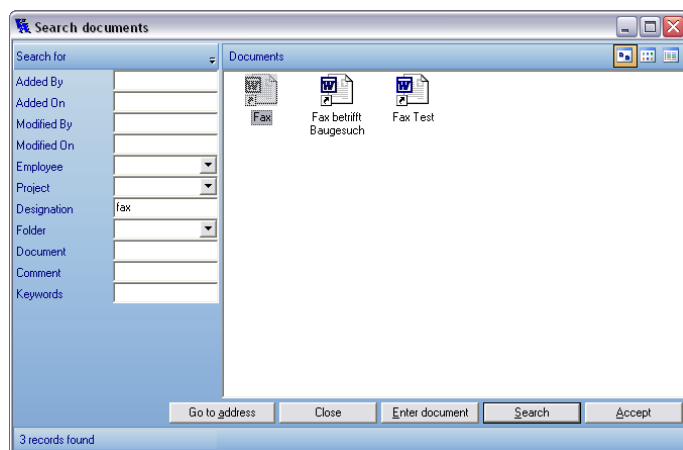
This function allows you to send personal emails via Outlook to multiple recipients at once.

- Go to menu *Record > Serial Email (personal)...*
- Select a filter or create a new one.
- The following window will give you some explanations, press *OK*.
- The email application will start with your own address in the *To:-field*.
- Enter the email subject
- Go to the body. Press *CTRL-V* to insert the variables into the body. Delete variables you don't need.
- Write your message and place the variables like e.g. letter salutation by drag and drop.
- Click on *Send* when done.

Outlook will now generate one email per address selected by your filter and send it. It will place the original message with your address in the *To:-field* in the *Outbox*, where it can now be deleted.

### Searching Documents

Go to menu *Edit > Search Document* or click on :



Searching is very similar to the extended address search.

**Go to Address:** Jump to the address where the document was found.

**Copy Document:** The selected document is being copied and may be pasted to any address.

**Enter Document:** Copies the selected document to the active address.

### Deleting Documents

To delete a document, first select it and then either go to menu *Edit > Delete > Delete Document*, click the *Delete Document* icon (red cross), press the *Delete* Key or right-click and select *Delete Document* and confirm the deletion.

### Document Templates

#### Concept

Every document created in Visual-Adress is based on an internal template. For Microsoft Word documents this is the template "Abex.dot" (Word 2003 and earlier) and "Abex.dotm" (Word 2007 and 2010), which are stored in the Word templates folder (default for Windows XP: C:\Documents and Settings\[YourName]\Application Data\Microsoft\Templates, default for Windows Vista and 7: C:\Program Files\Microsoft Office\Templates). The register *Empty Templates* contains all files in the Visual-Adress document folder. They have the name "LEER.xxx" (leer = empty), where xxx stands for any file extension<sup>2</sup>.

---

<sup>2</sup> If these templates are missing, they can be downloaded from <http://pmline.co.uk/downloads.aspx>

## Visual-Adress 6.9

Visual-Adress Templates are stored in the same folders as the corresponding documents.

### Integration of Document Templates for Additional Applications

In order to create a template for an additional application proceed as follows:

- Start the application and create a new, empty document
- Edit document settings where required
- Save the document as "LEER.XXX" in your Visual-Adress database directory in the "Document" folder, where XXX is the standard document extension of the application, e.g. "CDR" for Corel Draw.

The document template will be available when you start Visual-Adress the next time.

In order to convert an existing document into a Visual-Adress template proceed as follows:

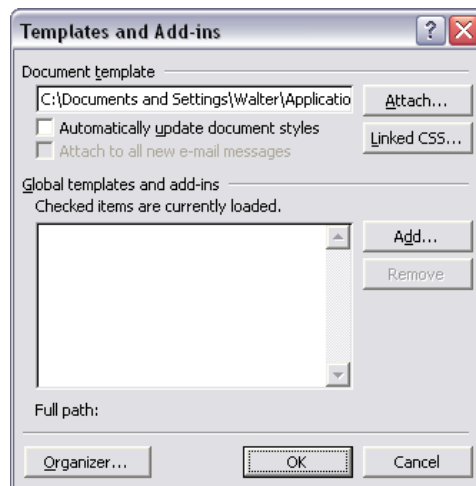
- Activate the *Documents* register
- Go to menu *Edit > New > New Template*
- Select the *External Documents* register and browse for the document (select *All files* in the "Files of type" field).
- Click OK and then enter the template properties
- Click OK again and edit the template if required
- Save your changes

The template has now been added to the *All Templates* register.

### Link Microsoft Word Templates to Abex.dot or Abex.dotm Belatedly

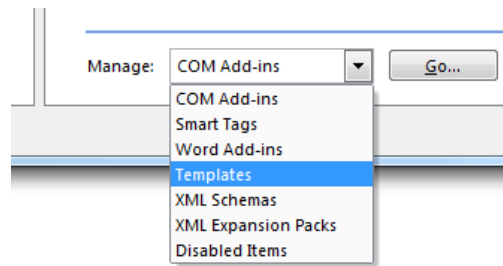
In order to make use of the functionality of Abex.dot or Abex.dotm proceed as follows:

- Open the Microsoft Word template
- In Office 2003 and older:
  - o Go to menu *Tools > Templates and Add-Ins...*

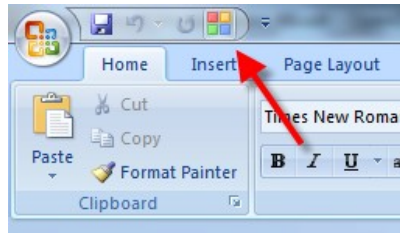


- o Select **Abex.dot**  
The Word toolbar will now show the new "VA-Menu" entry.
- In Office 2007 and later:
  - o Click on the *Office Button*, then click on *Word Options*.
  - o Now click on *Add-Ins*.
  - o At the bottom of the page select *Templates* and click *Go...*

## Visual-Adress 6.9



- Click on *Attach* and select **Abex.dotm**.
- You will now find a new Icon in the Quick Access Toolbar:



- Clicking this icon opens the VA-Menu.

## Create New Template

A new template based on an existing template is created exactly like a new document. Instead of selecting *New Document* select *New Template*.

## Word Automation Using Abex.dot/Abex.dotm

Visual-Adress and Microsoft Word form an ideal combination to create single and form (serial) letters and faxes.

### Hint:

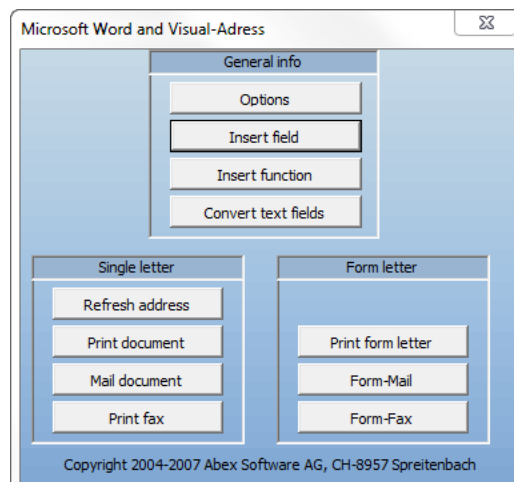
Avoid using horizontal frames in the document. Word sometimes has problems to find and update fields inside frames. Use tables instead.

## The VA-Menu

### General Info

The VA-Menu has 3 functional groups:

- General info
- Single letters
- Form (serial) letters



## Visual-Adress 6.9

### *Options*

Here you can set your field update preferences and the language for the VA-Menu.

### *Insert Field*

This button lets you insert fields from Visual-Adress into your document. All address data are available via DDE (Dynamic Data Exchange):

**Register Favourites** contains the most used prepared fields, i.e.

- Sender address, dependant on user
- Recipient address (corresponds to Visual-Adress address display)
- Recipient salutation (as in Visual-Adress)

**Register User** contains all data concerning your company and yourself.

**Register Docu** contains all important fields of the document properties.

**Register Address** contains all single fields of the address data in alphabetical order.

**Register Project** contains all fields of the related project (if one has been assigned).

### *Insert Function*

This button allows you to insert a Word summation formula into a Word table. Select the cell, which will contain the result, and perform the desired operation via the VA-Menu.

### **Single Letter**

#### *Refresh Address*

If the address is wrong, activate Visual-Adress, search for the desired address and click this button. Alternatively you can press F9 (Office 2003 and older).

#### *Print Document*

This function updates all fields and prints the document.

#### *Mail Document*

If your email application (Outlook) has been configured accordingly, you may mail the document by using this function

#### *Fax Document*

Visual-Adress supports WinFax Pro and Microsoft Fax. If no fax driver is found, this function switches to the print function and shows an error message.

### **Form Letter**

#### *Preparation*

If you have never sent a form letter, you first have to create a control file in Visual-Adress and select it in the *Options* menu (see Chapter "Document Administration"). Alternatively you may use the standard export definition provided. Then

- Go to any address
- Click on the register *Documents*
- Go to menu *Edit > New > New Serial Letter*
- Double-click a template
- Fill in the document properties and click *OK*
- Select an existing filter or create a new one for the addresses you want to use in your form letter to create the control file
- Switch to Word

## Visual-Adress 6.9

### *Print Form Letter*

- Write the letter
- Click on *Print Form Letter*
- Visual-Adress converts the single letter into a form letter
- Pre-Office XP: The *Print Window* opens, allowing for final adjustments

or

- Office XP and later: Printing starts immediately

### *Form Email*

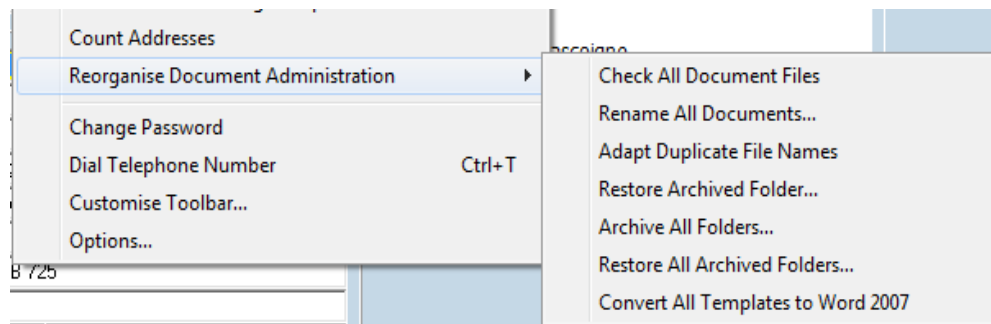
Identical to printing a form letter except that you have to enter the subject and to select between sending the letter inline or as attachment.

### *Form Fax*

Identical to printing a form letter.

## Keeping the Document Administration Up-To-Date

The document entries in Visual-Adress should correspond to the physical files on the hard disk at all times. Go to menu *Extras > Reorganise Document Administration* to resynchronise Visual-Adress and documents actually on the hard disk, to rename documents and to archive and restore documents.



## Deletion and Renaming

**Check All Document Files...** creates a list with document entries in Visual-Adress which do not/no longer point to a physical file on the hard disk. You may remove entries from this list by pressing the *Delete* key, which will prevent the entry from being deleted when you press the *Delete All* button. The *Delete All* button deletes all remaining list entries.

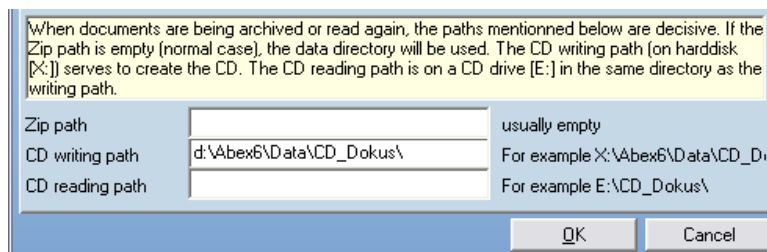
**Rename all documents...** reassigns file names using the document designation. In case of duplicate file names a sequential number is added. Spaces are converted to underscores.

**Adapt Duplicate File Names** finds duplicate file names and lets you adapt them as required.

## Archiving and Restoring Documents

### General Settings

Go to menu *Extras > Options*, register *Folders/Documents* and verify the paths.



Archived documents can still be opened, but they are write-protected.

### Archiving

To archive a single folder:

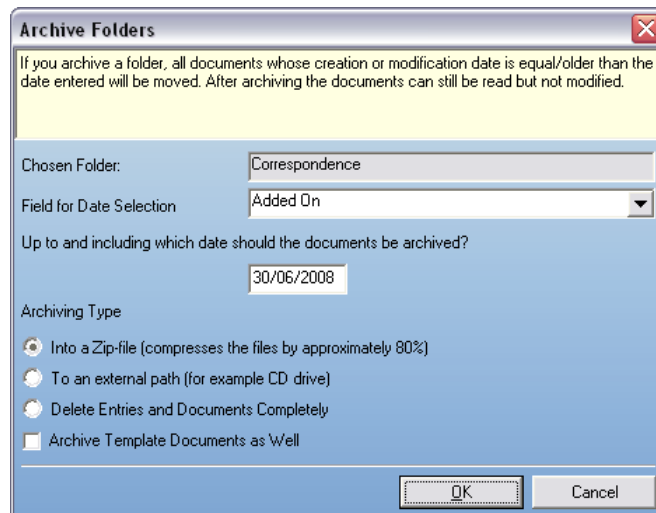
- Select the folder to be archived
- Right-click the folder and select *Archive Folder*

To archive all folders:

- Go to menu *Extras > Reorganise Document Administration > Archive All Folders* or right-click anywhere in the folder window and select *Archive All Folders*

## Visual-Adress 6.9

Then



- Verify that you have chosen the correct folder or "All folders"
- Select *Added On* or *Modified On* date
- Enter the up to date
- Select the appropriate options and press OK.

### **Important:**

When archiving to an external path, do not delete the original folder, even if it is empty!

Once documents have been deleted (option "Delete entries and documents completely") they cannot be restored.

### **Restoring**

To restore a zip archive proceed as follows:

- Right-click the archive folder and select *Restore Folder Archive*. The write-protection is being removed.

Note that the documents will not be restored into the original document folder.

# Date Administration

## Introduction

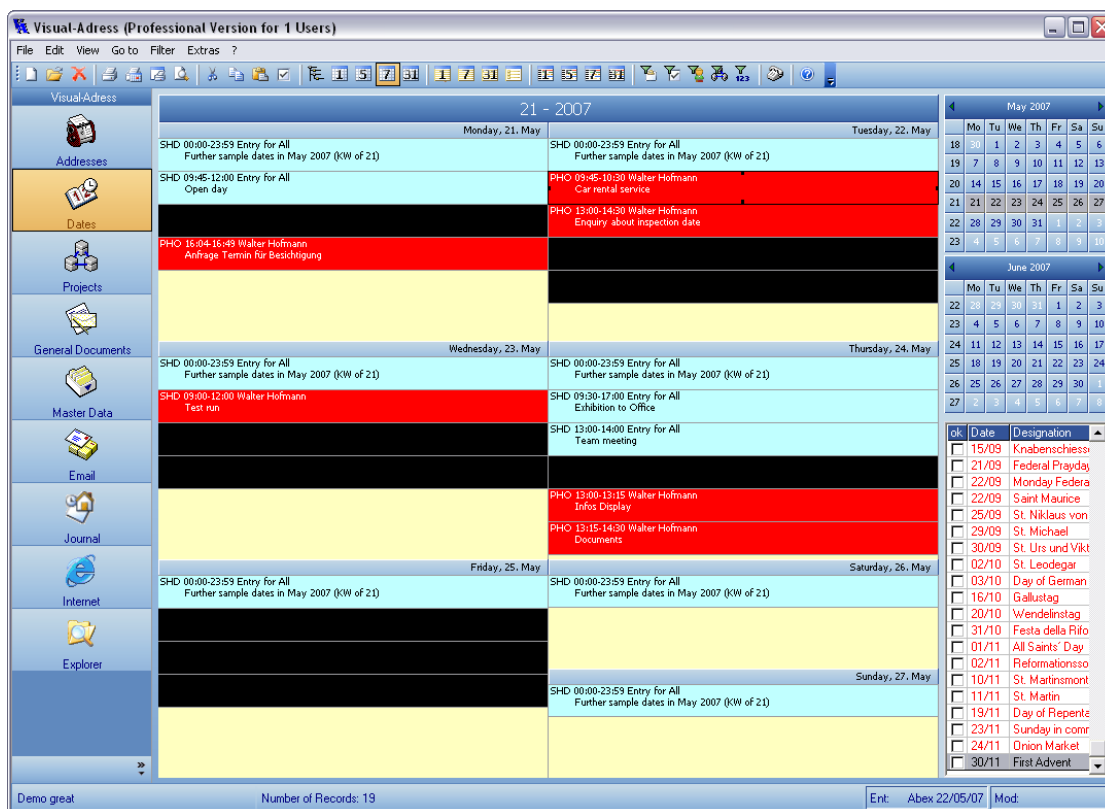
### General

The Visual-Adress date administration coordinates your appointments and tasks. As opposed to most other date administration applications this one has direct access to your addresses. Of course you can enter dates without link to an address. Linked dates will also show in the *History* of the corresponding address. This has the advantage that you can modify dates in the date as well as in the notes administration. Visual-Adress alarms you when a date is due.

Various preferences can be set by going to menu *Extras > Options*, registers *Dates*, *Tasks* and *Alarm Clock*.

The colours used for the individual employees can be assigned in Visual-Admin.

### Organisation



The form contains 3 main areas:

- Left: Schedule display (day, week, month) or list of deadlines
- Top right: Calendar (navigator), showing up to 24 months
- Bottom Right: To-do list

### Navigation

To select the dates to be displayed in the schedule use the calendar:

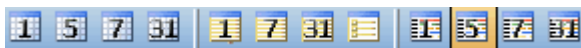
- **Arrows left / right:** Depending on the schedule selected the display goes back or forth by one day, one week or one month.
- **Empty field left of weekdays:** Selects entire month
- **Calendar Week:** Selects entire week

## Visual-Adress 6.9

- **Day:** Clicking a day selects it, shift-clicking a second day in the same month selects all days from first to second click.
- **Past or Future:** Right-click in the month header and select the desired Month/Year.

## Views

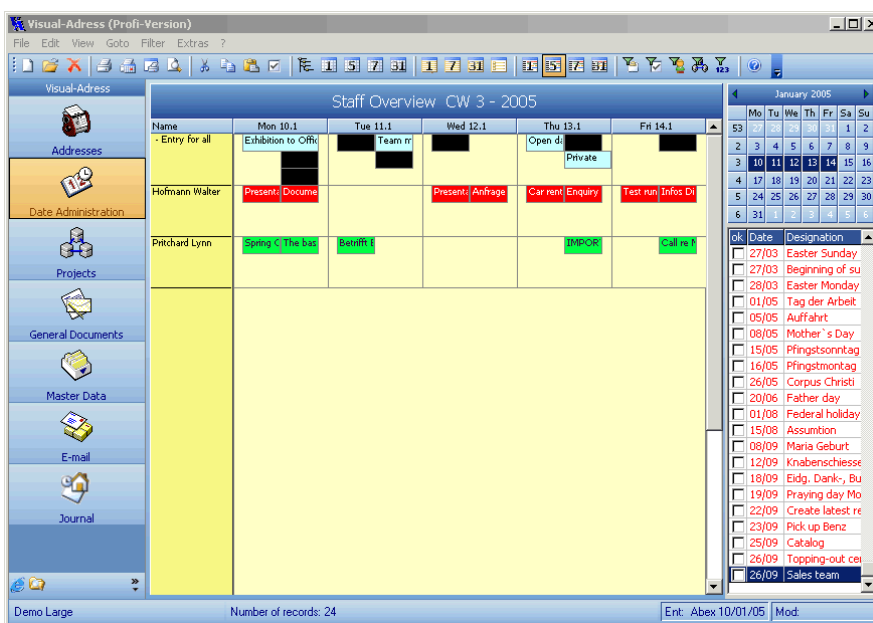
Change between views by going to menu View and selecting the desired view or click on one of the icons in the menu bar,



where from left to right:

- Dates day, work week, week, month, date list day, week, month, list of open items and staff overview day, work week, week, month.

Version 6.5 introduced a new staff overview:



The fields shown in date lists and the list of open items can be modified by right-clicking in the column header, which opens a form as e.g. when modifying the address list display.

The list of open items shows overdue dates and tasks in red.

## Dates

### Add Dates

- Double-click the cell of the desired date, click on the *New Note* icon or right-click in the cell and select *New Note*.
- Select the note type, e.g. "Schedule" and click OK.
- Fill in the fields as required

If you want to link an address to the date, continue as follows:

- Press *Assign Address* to link the entry to an address.
- Search for the address in the "Search in: Addresses"-form, which opens now.

If the date is recurrent, continue as follows:

- Press *Multiple Date*
- A wizard will guide you through selecting the interval between dates and the validity.

## Move Dates

You can move a date from one date to another by using drag and drop.

If you want to change the duration of a date, move the cursor to the bottom of the date, where the cursor changes to an up and down arrow. Now click and drag to change the duration (only in day and work week view).


## Context Menu

Right-clicking a date opens a context menu, which allows you to perform many different functions that are self explanatory.

## Scheduling Conflicts

Overlapping dates considering user, date and time are shown in a separate window. Selecting *OK* will still accept the schedule, whereas *Cancel* returns to the entry form, where you can adjust date and/or time.

## Print Date Overview

By going to menu *File > Print Date Overview* or pressing  you can print the selected view graphically. In case you do not want to print all dates, you have to set a filter before.

## Tasks

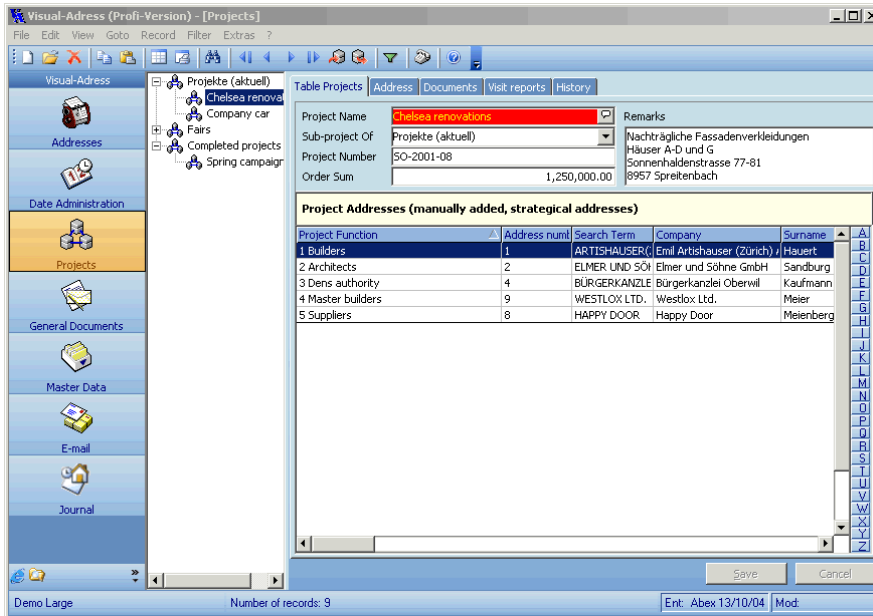
As opposed to dates the task notes do not contain any from/to time fields. As mentioned earlier, tasks are shown on the right side of the form.

To add a task is identical to adding a date, just select the note type "Tasks".

# Projects

## Introduction

In the projects section projects are superordinate to addresses, notes and documents, giving you an overview over all project related events.



## Operation

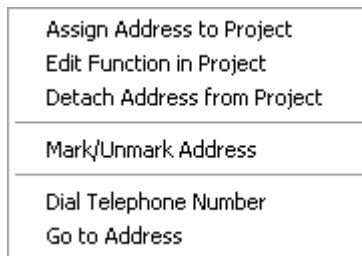
### Project Table

In the register *Project Table* you may add new projects and link addresses and the function of that address in the project.

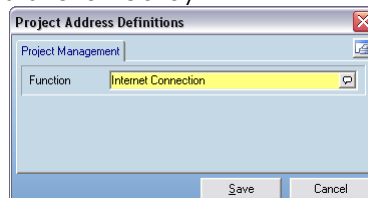
New projects can be added by either clicking on the *New Project* icon or by going to menu *Edit > New Project*.

Note that you can turn projects into sub-projects of an existing project by selecting a project from the drop-down list of the field "Sub-project Of".

Right-click in the empty space in the project addresses area to



- Assign a new address. The standard "Search in: Addresses" form opens, which lets you select the desired address. This is followed by



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to enter the function in the project.

- Edit the function in an existing project
- Detach an address from the project
- Dial a phone number of the selected address
- Go to the selected address

### **Documents**

Here you will find all documents linked to the project. You can add new documents here, too. Don't forget to assign an address to the new document where applicable.

### **Specific Note Types / History**

As for the addresses registers for specific note types may be created using Visual-Admin. These registers show all notes linked to the project. You can add new notes here, too. Don't forget to assign an address to the new note where applicable.

## Printing

### Introduction

With Visual-Adress you can filter and evaluate all fields of the database. In order to print these selections Visual-Adress supports you with simple dialogs to print lists and labels.

Visual-Adress includes a number of ready to use templates. These templates may be amended and new ones may be created in Visual-Listdesigner. Visual-Adress distinguishes between pure address lists and note lists.

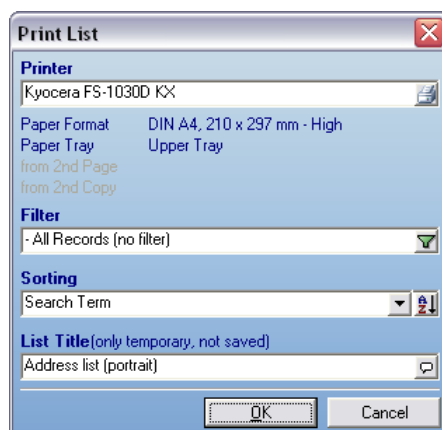
To print labels Visual-Adress contains a number of label templates.

### Previewing / Printing Lists

To preview a list go to menu *File > Page Preview* or click on the *Preview* icon in the menu bar. To print a list go to menu *File > Print* or click on the *Print* icon in the menu bar. The window which opens lets you select a list from all templates available. As with filters you may add frequently used lists to your personal selection.

### Address Lists

If you have selected an address list, the following form opens:



Here you can select the printer, the filter, the sorting and modify the list title temporarily. It is suggested not to modify the paper size settings, since this may produce unpredictable results. Paper size and border settings are predefined in Visual-Listdesigner.

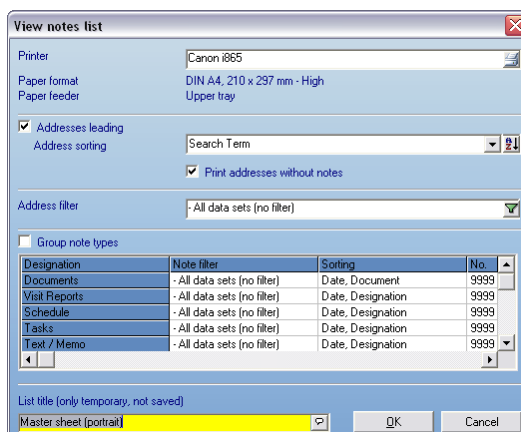
**Important:**

Any filter and sorting settings made elsewhere (e.g. in the address form) are not active here. You will have to select filter and sorting settings explicitly for the list.

### Notes Lists

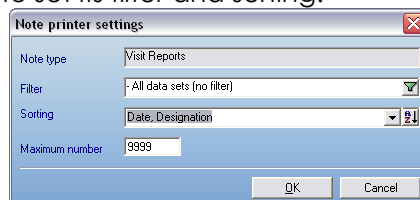
Lists, which combine addresses and notes use the following form:

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Settings:

- "Addresses leading" will first select the address and then all notes linked to that address. Unselect this option to print notes that are not linked to addresses, e.g. schedule lists.
- "Print addresses without notes" will print all addresses selected by the address filter, even when there are no notes linked to it.
- "Group note types" will group the notes by type and then by the sorting set below.
- Double-click a note type to set its filter and sorting:




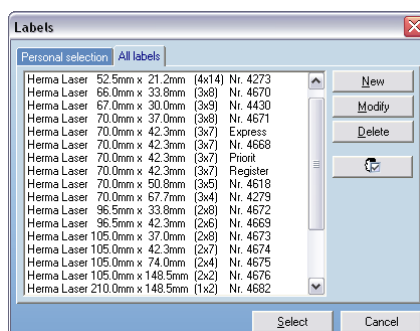
## Printing Labels

Visual-Adress provides efficient label printing functions. You can print single or form labels containing address and note data. All predefined labels are provided with the recipient address block.

Make sure that the label selected is admitted for your printer. Using the wrong type of paper may damage your printer.

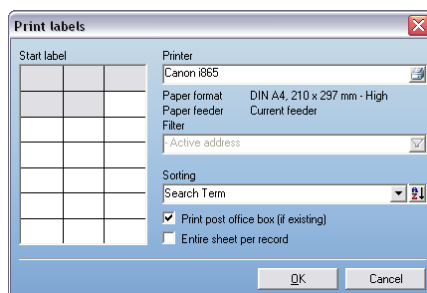
## Individual Label

Click on the  icon *Print Individual Label* or go to menu *File > Print Individual Label*. Select *All Labels*.



Select the appropriate label by double-click or by clicking the label name and pressing *Select*.

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- In the field "Start Label" click on the field where you want to start printing if you want to print on a partly used sheet.
- Select the printer
- Select whether to print the post office box instead of the street name (this depends on the settings in Visual-Admin).
- If you want to print an entire sheet with the same address, activate "Entire sheet per record".
- Press OK to print the active address.

### Form Labels

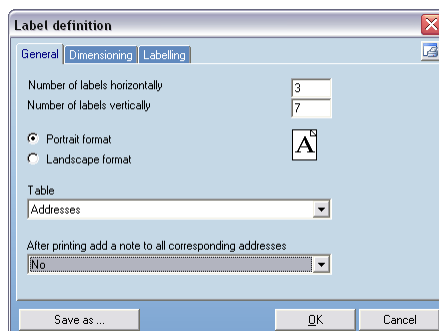
Go to menu *File > Print Labels*. The procedure is almost identical to printing individual labels. In addition you can now select a filter and sort criteria.

### Creating Labels

You can create new labels or modify existing labels and save them with a new name.

- Go to menu *File > Print Labels*.
- Either select a label to modify and press *Modify* or press *New*.

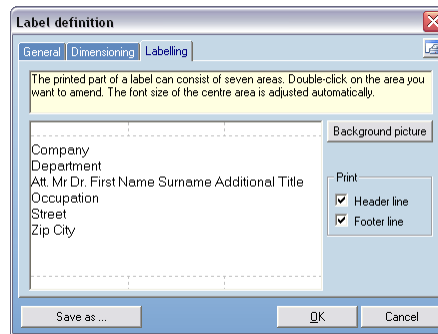
When you modify a label, the original definitions will be shown in the following window, whereas when you create a label from scratch, most options will be empty.



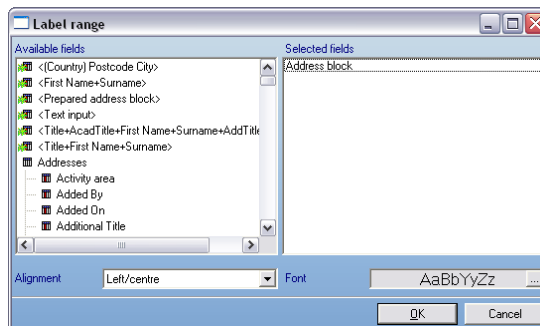
- Fill the fields as appropriate.
- If you modify an existing label, press *Save as ...* to save the label under a different name.
- Then click on register *Dimensioning* to define the label size and layout. Note that dimensions are in millimetres.
- Next click on register *Labelling*.

The label consists of 7 different areas (3 header fields, centre field, 3 footer fields). For each field you can select the content individually by double-clicking in the field.

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Since you can only assign 1 field per row, the address table contains several predefined field combinations that you can use instead of the address block or single fields.



- Move fields to the selection by double-click.
- Press OK when done.

Optionally:

- Press *Background Picture* to insert a background picture for your label
- Select a picture either from the database or from an external source.
- Select sizing options

## Import / Export

### Introduction

Visual-Adress provides three kinds of imports / exports:

- One time import / export from external application, e.g. Excel, Access, etc.
- Update import / export to synchronise data between Visual-Adress and an external application.
- Standardised import / export from / to Outlook address book.

Technically, the first two methods are identical, whereas the data exchange with Outlook is pre-defined.

The update import / export generally serves to synchronise data between Visual-Adress and ERP systems, thereby avoiding the need to enter identical data manually twice. So that during import existing data are not being deleted or overwritten by different records, they have to be identified by a unique key.

To facilitate import it is often necessary to adapt the field structure in Visual-Adress.

#### Recommendation:

Always make a backup of your data before importing. Errors in the import definition may destroy your data!

## Import

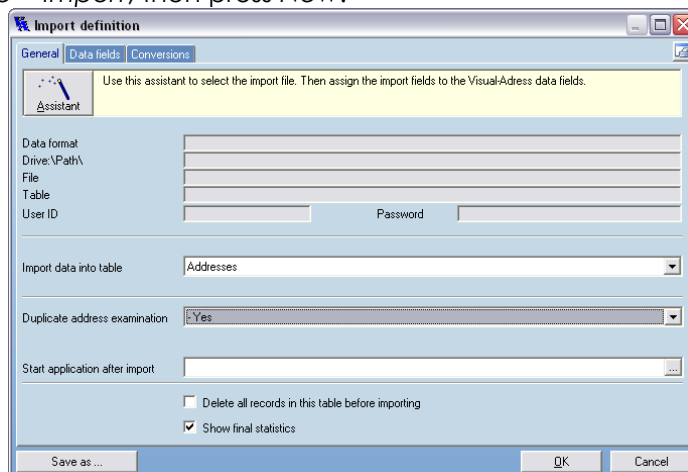
### Use Predefined Import Definitions

- Go to menu *File > Import*
- Click on register *All imports*.
- Double-click the desired entry or click it and press *Select*.

### Simple Example

First you will need to prepare a simple example using Excel.

- Start Excel with a new file.
- Enter the following column headings:  
**Last Name, First Name, Street, City, Postcode, Telephone, Fax.**
- Enter at least four rows with data.
- For xls files define the printing area by first marking all used fields and then going to menu *File > Print Area > Set Print Area*.
- Save the file as "Addresses.xls".
- Exit Excel and open Visual-Adress using the demo clientele "Demo Gross".
- Go to menu *File > Import*, then press *New*.



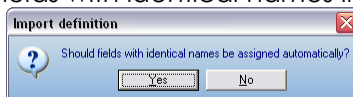
## Visual-Adress 6.9

- Select the appropriate table, into which your data shall be imported. For the example select "Addresses"
- Select whether Visual-Adress should check for duplicate entries.
- Leave the checkboxes at their defaults.
- Next press the *Wizard* button.
- In the following window select the source file type, i.e. Excel 8.0 (for Versions 97, 2000, XP and 2003).
- Press *Continue*.
- Then enter the path of the import file or press *Browse*.
- Press *Continue*.
- Then check the entries
- Press *Continue*.

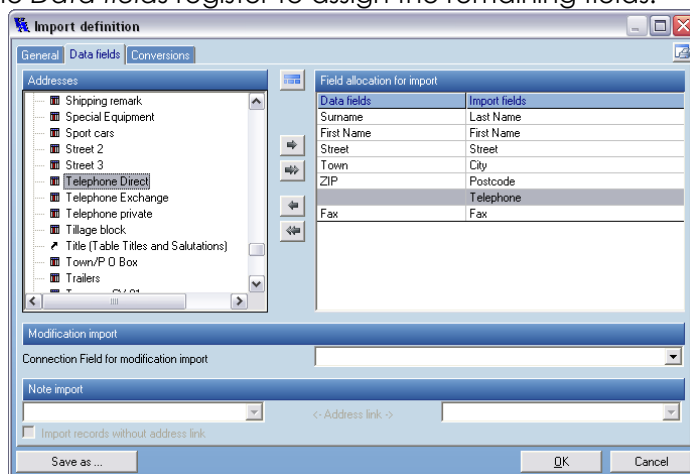
### Note:


When importing other formats, additional input may be required. The assistant then opens different windows.

- Let Visual-Adress assign the fields with identical names in the import file.




- Now click on the *Data fields* register to assign the remaining fields.



- First select an unassigned field on the right, then select the corresponding field in Visual-Adress on the left and press the  button or double-click the field name.
- Press OK.
- Save the import definition (Save as... lets you save a modified definition under a new name).
- Double-click the import definition or select it and press *Select* to import your data.
- Unless pre-assigned before, select whether to test for duplicate entries or not now.

## Enhanced Import Features

### Import Format "Fixed Width"

- When creating a new import definition, start the wizard and select "Text with fixed width".
- You can then split the records into up to 10 parts by pressing  on the *Data fields* register.

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Initial position	Length
1	4
5	20
0	0
0	0
0	0
0	0
0	0
0	0
0	0
0	0
0	0

### Update Import

If you repeatedly import addresses from the same external source, corresponding addresses will be updated and new addresses will be added. This requires a field, which is identical and unique both in the external source and in Visual-Adress. You can e.g. use the address number or a custom field added to the database in Visual-Admin. Only use the address number if you never add or edit addresses in Visual-Adress itself.

- Start a new import definition as above.
- On the register *Data fields* select the connection field

Modification import  
Connection Field for modification import: Address number

- Assign the fields manually that have not been assigned automatically.
- Continue as above.

### Notes Import

A notes import is similar to the update import. It lets you import notes from an external data source and assign them to an address.

- Start a new import definition as above.
- On the register *General* select the note type, which you want to use to import the data into, e.g. "Tasks".
- Assign the fields manually.
- Select the link fields with the addresses on the *Data fields* register.

Note import  
Address number <- Address link -> Number  
 Import records without address link

Optionally you can import the notes without linking them to addresses by checking "Import records without address link".

## Export

### General

With Visual-Adress it is possible to export data from all tables into many different formats. Mostly you will want to export some addresses to be used as recipients of a form letter.

Visual-Adress export formats are compatible with Microsoft Word and Excel input conversions so that no additional statements are required. Visual-Adress supports export to the clipboard as well.

### Use Predefined Export Definition

- To start go to menu *File > Export*.
- Click on register *All export*.
- Double-click the desired entry or click it and press *Select*.

## Create/Modify Export Definitions

- To start go to menu *File > Export*.
- Press *New*.
- Select the export format, the table from which you want to export, chose a filter (optionally select "Ask at runtime"), select/enter the default save location (optionally select "Select at runtime"), select a sort order (optionally select "Select at runtime") and, when exporting addresses, select whether to add a note to the addresses (optionally "Select yes/no at runtime").
- Click on register *Data fields* and select the fields you want to export (identical to *Import*).
  - o When exporting address data, fields in related master data may be selected by clicking the "+" sign to expand the list.
  - o For various fields (numbers, telephone fields and some text fields) the processing of the value may be selected by clicking into the "Export format" field and then browsing the available options.

### Recommendation:

Use the special fields to export phone and fax numbers as well as email and hyperlinks.

- o The register *Insert Text Field* allows you to insert a constant text which will be added to all records.
- Click on register *Supplementary definitions* and enter the appropriate values/select options.
- Press *OK* to save a new definition or *Save as...* to save a modified definition under a new name.

## Special Exports

### Outlook

There are some predefined exports for addresses, tasks and dates to Outlook 2000/XP/2003. The data will be exported as update, thereby adding new and modifying records but leaving addresses not in Visual-Adress untouched.

When exporting addresses you may export to any private or public Outlook address book/contact folder.

### Note:

Addresses, tasks and dates can be synchronised between Visual-Adress and Outlook using **Visual-Synchro**.

### Palm Handhelds

The export definitions contain a predefined export to the Palm contacts. Note however that this only works with the original Palm address book and memo pad.

- Go to menu *File > Export*.
- In register *All Exports* select "Palm Handheld".
- Press *Select*.
- In the *Save as ...* window browse for the path and enter a file name, then press *OK*.
- To set up the HotSync initially, right-click the HotSync icon in the bottom right corner of the screen and select *File Link ...* and then follow the on screen instructions.

## The “Record” Menu Functions

### Note:

The following descriptions are valid when you have selected *Addresses*. The available menus are different for other selections, their use is similar, however.

### Navigation

Instead of clicking the corresponding icons you can navigate back- and forwards using the menus *Record > Goto ...*

### Sorting

See Sorting Addresses

### Series

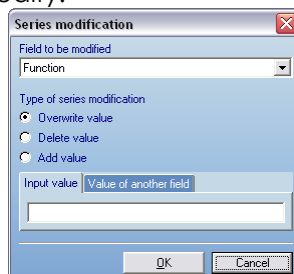
### Warning:

Never experiment with these functions with your live data, as once executed there is no possibility to revert the modifications. Always make a backup first.

### Serial Modification ...

This function allows you to replace or amend a field value by a manual input or data from another field.

- Go to menu *Record > Serial Modification ...*
- Select the table to be modified.
- Select a filter or create a new filter.
- Select the field you want to modify.



- Then select whether you want to overwrite, delete or amend the existing value.
- When you select “Overwrite” or “Append”, you can then either enter the new/appended value manually or select the value of another field.
- Press OK and then confirm the execution.

### Serial Note ...

This function allows you to add a note (task, date or any other note type) to selected addresses.

- Go to menu *Record > Serial Note ...*
- Select a filter or create a new one.
- Select the note type.
- Fill in the note.
- Press OK to create the notes.

### Serial Note from Date Field

This function allows you to add a note based on a date field or three fields containing a date part, i.e. the birthday of key clients.

- Go to menu *Record > Serial Note from Date Field*.
- Select either a date fields or three fields containing day, month and year.

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- Press *Continue* and then enter the year or select "Year from date field(s)"
- Optionally enter an offset (e.g. "-5" means the date will be set 5 days before the actual date).
- Press *Continue* and then select an address filter.
- Press *Continue* and select the note type.
- Press *OK* to create the notes.

### Serial Replication with TwixTel ...

TwixTel is the main Swiss telephone register available on CD. This function allows the update of addresses with Swiss addresses found in this CD.

### Serial Replication with Skype

This function searches the Skype online database for Skype ID's based on the email address in Visual-Adress. If found the ID is entered in the IP telephone field.

### Serial Deletion

This function deletes the selected records for good.

- Go to menu *Record > Serial Deletion ...*
- Select the table from which you want to delete records

**Warning:**

When you delete addresses, all related notes and documents will be deleted as well.

- Select the filter or create a new one.
- Press *OK* and then confirm the execution.

### Addresses: Renumber all Addresses

All addresses are renumbered according to the selected sort order.

### Addresses: Rebuild all Search Terms

Rebuilds the field "Search Term", whereby search term exceptions are considered.

### Addresses: Rebuild all Letter Salutations

Rebuilds the field "Salutation". All manual entries will be overwritten by the standard entries.

### Addresses: Search Duplicates

This is basically the same test which is also performed before saving a new address. The test checks all addresses and stops, when a duplicate is found. Again, you now have the choice between

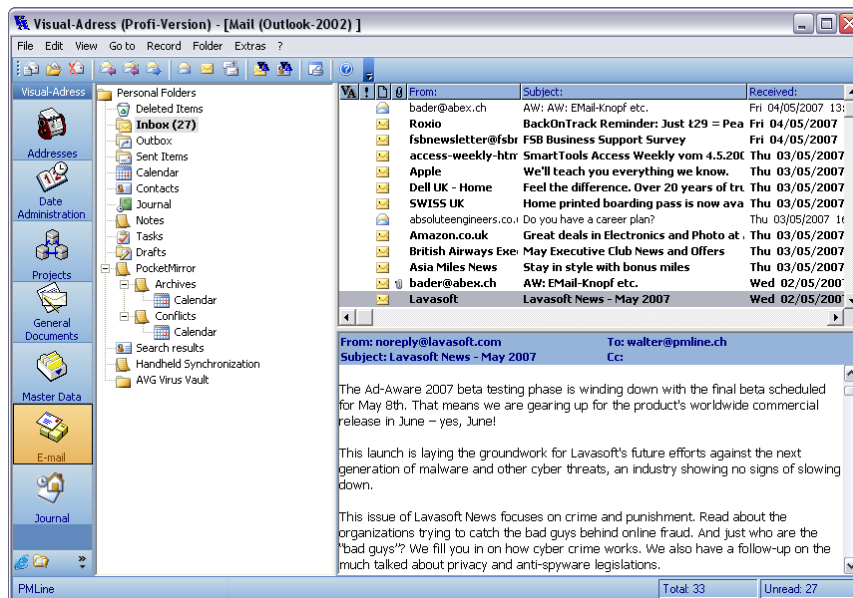
- Keeping the duplicate as main address
- Keeping the duplicate as sub-address
- Keeping the duplicate as duplicate
- Deleting the duplicate, notes will be transferred to the remaining address.

Selecting "All" performs the same action with all subsequent duplicates and should be used with caution, as there is no undo possibility.


## Email


The email work area is basically an integration of Microsoft Outlook into Visual-Adress.

If "Open as MAPI session" is activated in the email options, Outlook has to be set as default mail application in the Internet Options Control Panel.



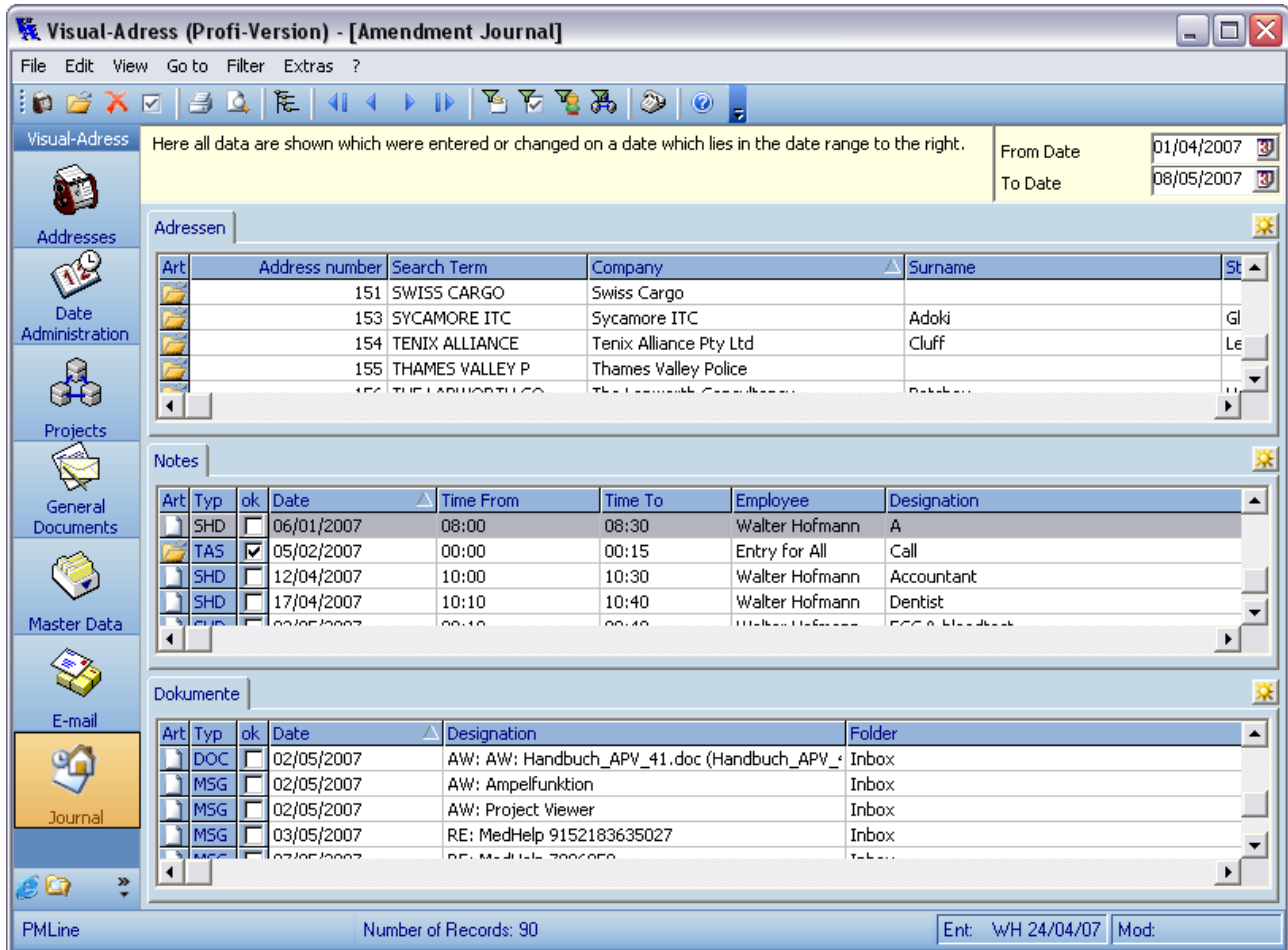
Depending on the option settings Visual-Adress shows the Public, Personal and/or Other Outlook folders.

Emails for recipients, whose email address is also entered in Visual-Adress, are by default copied to the documents of that recipient. By default attachments are stored separately. Imported emails can be recognised by the -Logo in the first column.

The preview window shows text only. In order to read HTML messages, they have to be opened by double-clicking, by clicking and then clicking the  button or by opening menu *Edit > Open Message*. This opens the message in Outlook.

## Journal

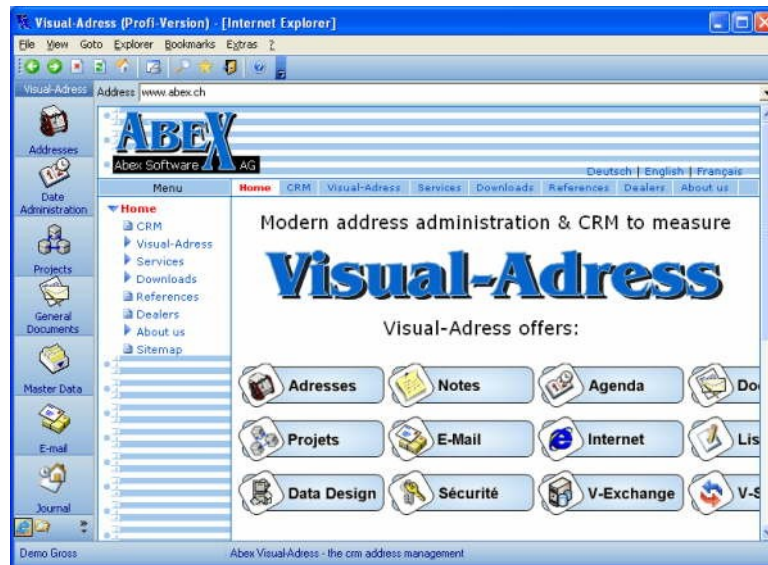
The Journal shows new and amended entries between two dates for addresses, notes and documents.



Notes and documents can be marked as "done" by ticking the "ok" field. Open any entry by double-click. Further options are available via the context menu (right click).

## Internet

This is a straight forward integration of Microsoft Internet Explorer into Visual-Adress.

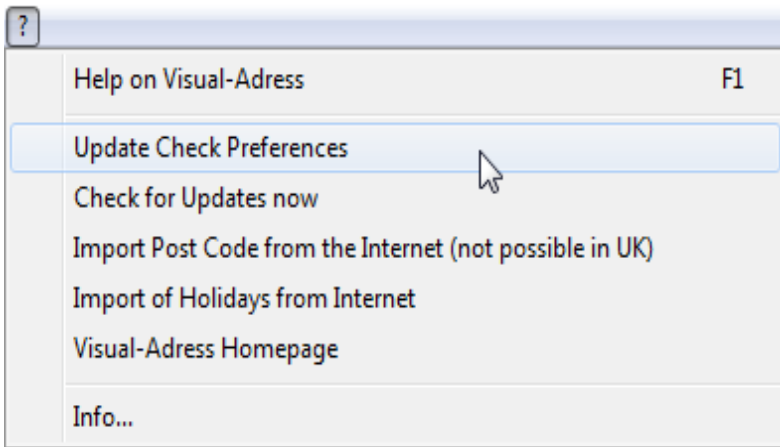


It integrates

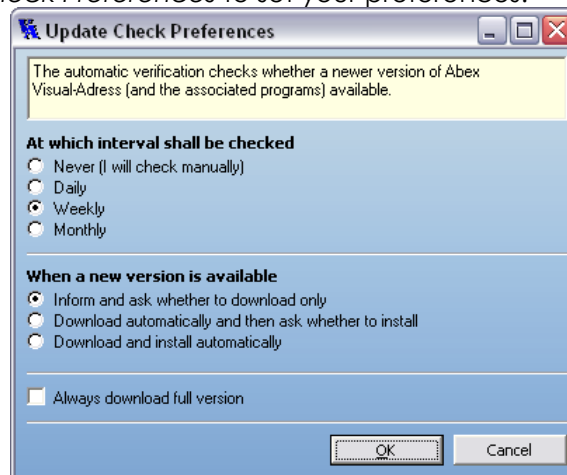
- Bookmark administration
- Surf history
- Search function (Google)

## Automatic Update

Starting with version 6.7.19 Visual-Adress now includes an automatic update function.



Go to menu ? > *Update Check Preferences* to set your preferences:



You can also check manually. Go to menu ? > *Check for Update now*.