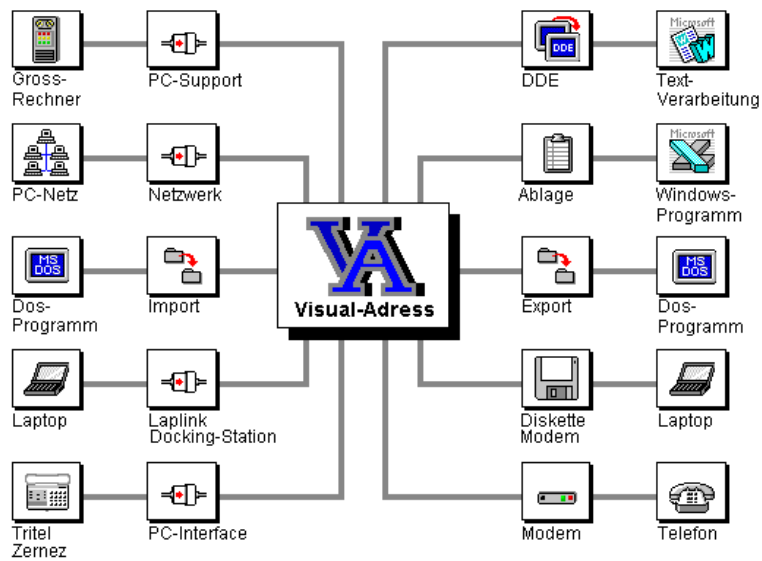


User Manual

Visual-List Designer 6.9



03 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-List Designer.

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-List Designer Basics

Visual-List Designer is the application to design all lists to print reports of all Visual-Adress data. It is used to customise Visual-Adress to the needs of your company. You can create your own lists or modify existing ones. Visual-List Designer contains a preview function, allowing checking the functions with your actual data.

Before starting make sure that you know the data model of Visual-Adress. Follow the following steps:

- Know the Visual-Address data model: Tables, fields, relations
- Know the Visual-List Designer structure
- Draft the list on a piece of paper
- Create the list
- Test the list

Start-up and Personal Settings

Start-Up

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

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 any existing report.
- 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.

Visual-List Designer Elements

All tools required to create a list may be found in the menu and the menu bar.

Sections

A list may contain the following sections:

Page Header First Page

The header for the first page of the report, containing e.g. logo, list title, etc.

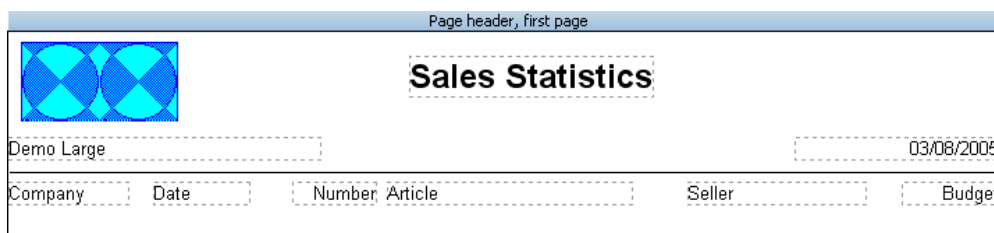


Figure 1: Page header first page

Page Header/Footer

The header for data repeated on each page, e.g. list title, date, page number, column headers, etc.

Page header					
Demo Large	Sales-Statistics-2			03/08/2005	
Company	Date	Number	Article	Seller	Budget

Page footer
Page: 0

Figure 2: Page header and footer

Group Header/Footer

The group headers and footers contain information, which is identical for a number of detail records or which summarises details.

Group header (Product Interest / Bought -> Address record ID)					
Search Term	Company	Surname			
	Company 2	Telephone Direct	Telephone Direct		
	Street	Telephone Exchan	Telephone Exchang		
	XXXX XXXX XXXX	Fax	Fax		
	Remark				

Group footer (Product Interest / Bought -> Address record ID)					
Total number	9,999,999	Total sales:	Record c:	Total turnover:	9,999,999.00
		Average per sale:			9,999,999.00

Figure 3: Group header and footer

Detail Section

The detail section contains the information specific to each record, e.g. all the notes of one or several note types linked to the address in the group header.

Detail (Product Interest / Bought)					
Date	Number	Designation	Seller	Budget	
Comment					

Figure 4: Detail section


Page Footer Last Page

The page footer of the last page may contain a summary

Field Types

Visual-List Designer contains the following data types, which may be selected, either by going to menu *Insert* or by selecting them from the menu bar:



-  Database field
-  Text field
-  Formula field
-  Multi field
-  Special field
-  Line
-  Rectangle
-  Picture

Database Field

When clicking on the *Database field* icon, the cursor changes to **dB**. If you now click on an area of the list, the field selection window opens.

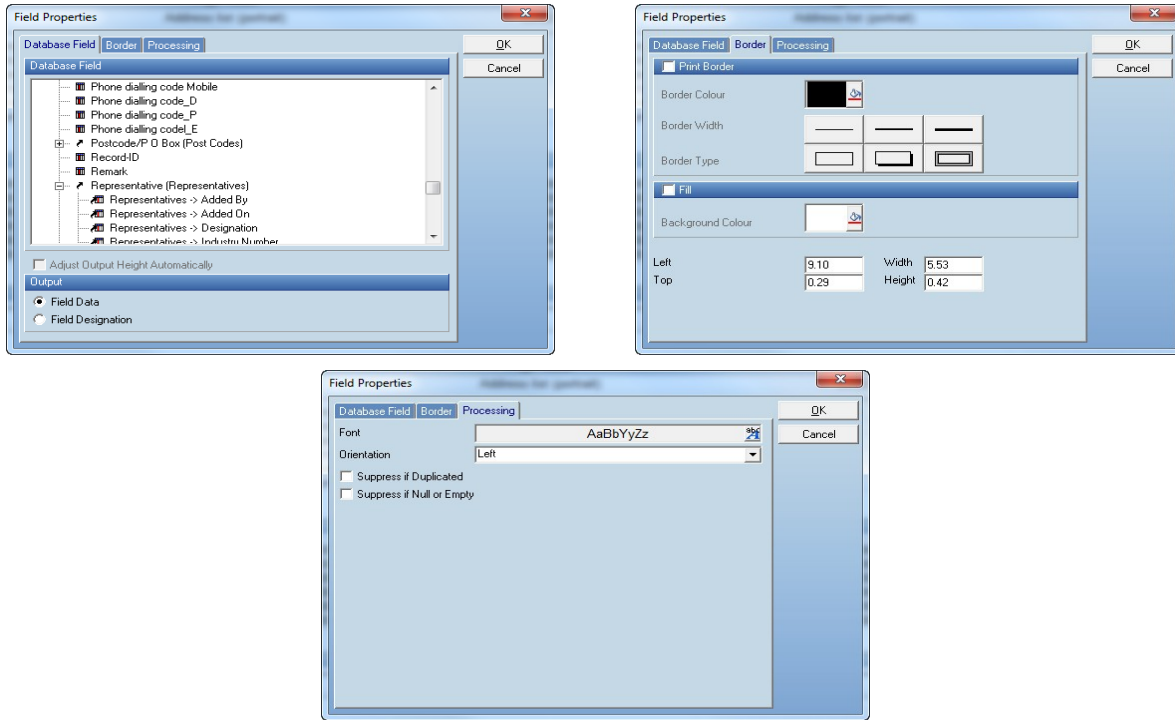


Figure 5: Database field

Register Database Field

- Select a field by double-clicking.
- Select whether to insert the field data or the field designation.

Register Border

- Select frame colour, frame width and frame type.
- Select "Fill" and then a colour to insert a background colour.
- Use the dimensioning fields to position the fields precisely. The dimensions are in centimeters.

Register Processing

- Select font and alignment.
- Select the options to suppress duplicates or empty fields.

Text Fields

When clicking on the *Text field* icon, the cursor changes to **T**. If you now click on an area of the list, the following window opens.

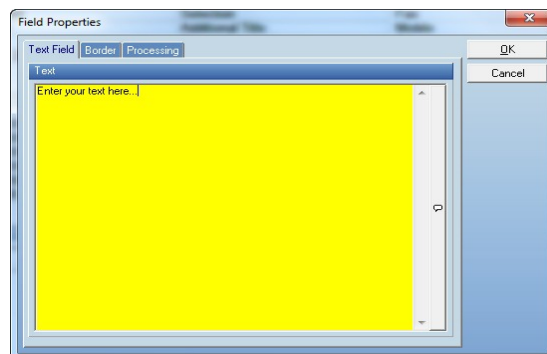


Figure 6: Text field

Register Text Field

- Enter any text you like. Normally you would enter a description to a database field. Clicking on the vertical button on the right of the input field opens a window to input text in other languages.

Registers Border and Processing

Identical to database fields.

Formula Fields

When clicking on the *Formula field* icon, a window opens in which you can perform calculations using numerical fields.

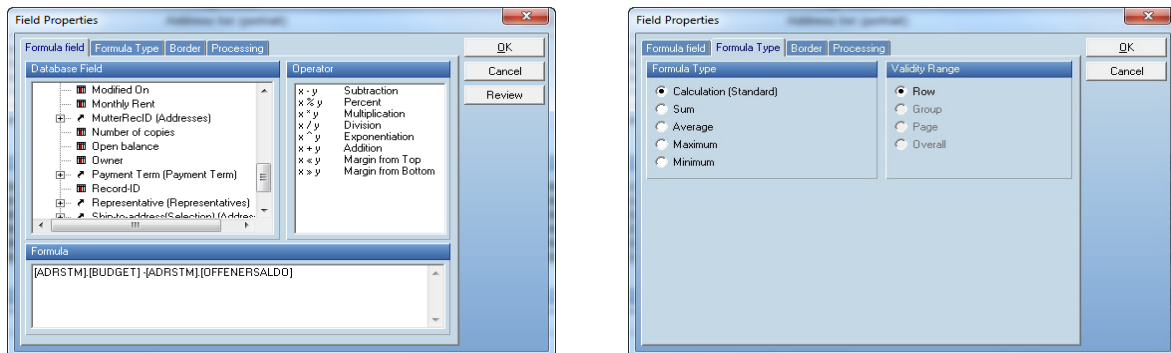


Figure 7: Formula field

Register Formula Field

- Select the first field by double-clicking it.
- Select an operator by double-clicking it.
- Select the next field by double-clicking it.

Hint:

To calculate something like $a * (b + c)$ you can insert the parenthesis manually in the formula field.

Register Formula Type

This register allows the setting of the validity range of the formula.

- Calculation (Standard): Allows the entry of any fields and operators
- Sum: Calculates the sum for a group, a page or the entire list
- Average: Calculates the average for a group, a page or the entire list
- Maximum/Minimum: Largest or smallest value for the section

Registers Border and Processing

Identical to database fields.

Multi Field

The multi field allows inserting several field values into one list field, e.g. city and postcode.

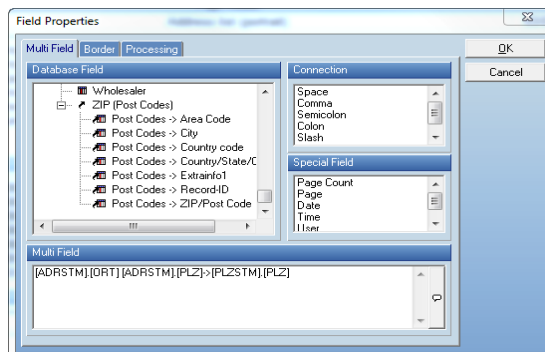


Figure 8: Multi field

Register Multi Field

- Select the first field by double-clicking it.

- Select a connection by double-clicking it.
- Select the next field by double-clicking it.

Some special fields like page number, date, time, etc. may be inserted instead of database fields as well.

Registers Border and Processing

Identical to database fields.

Special Field

The special fields are used to insert either predefined database field combinations like the address block or system values like date, time, page number, user data, etc.

Register Special Field

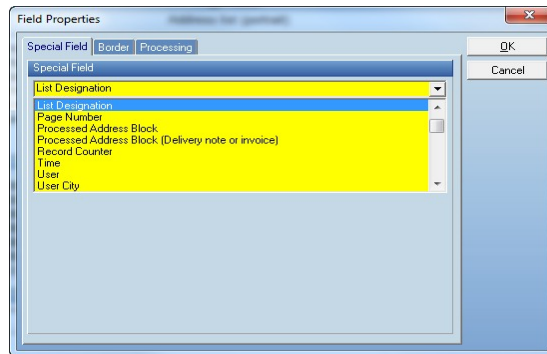


Figure 9: Special field

Registers Border and Processing

Identical to database fields.

Line

Click on the line icon to draw a horizontal line. When you release the mouse button, the field properties window opens, allowing you to select colour, line width and dash style.

Rectangle

Click on the rectangle icon to draw a rectangle inside a report area. When you release the mouse button, the field properties window opens, allowing you to select colours, line width and border style.

Graphic

Click on the graphic icon to insert any bitmap. Having selected the picture, another window opens, allowing you to scale the picture.

List Design

New Report

To create a new report click on the *New* icon or go to menu *File > New....*

Note:
 Instead of starting a new report from scratch, it is sometimes faster and more simple to use an existing template and to modify it to suit your requirements.

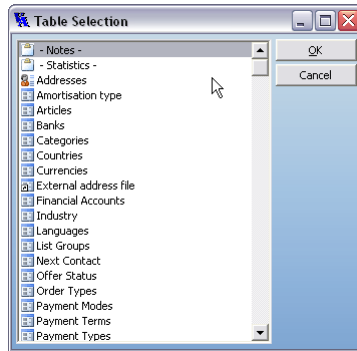


Figure 10: Table selection

- To create a list using a specific table, select the table and press OK.
- To create a list using one or several note types, select “- Notes -” and press OK.
- In the next window select the desired note types.
- Now set basic list properties:

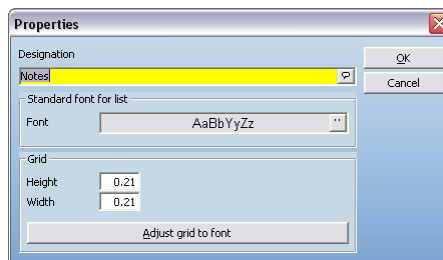


Figure 11: List properties

- Enter the list title, select the standard font and set the grid pattern (in cm). It is recommended to use the button *Adjust grid to font* to set the grid height.

Create Report Sections

Having set the properties, Visual-List Designer will then show the default section layout. In the figure below the notes type “Product Interest / Bought”) in the large demo client has been selected.

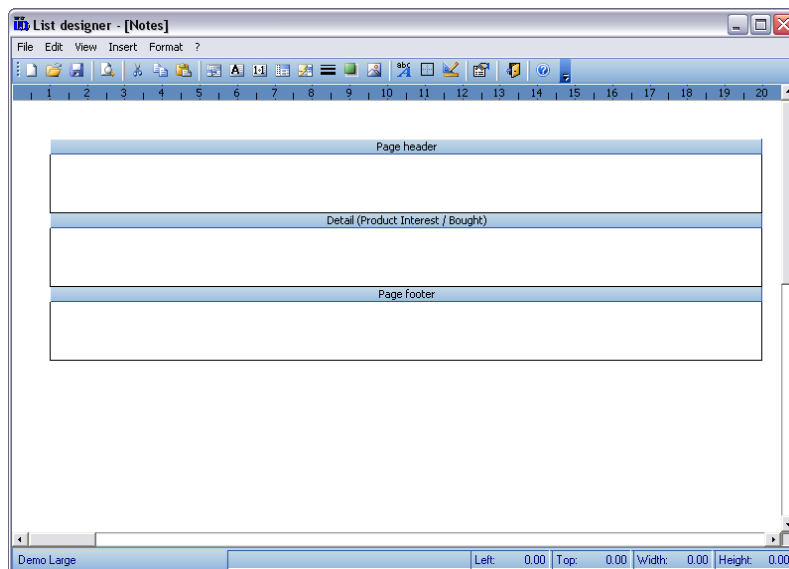


Figure 12: Default Sections

- Go to menu *Insert > Group Section...*
- Select “Product Interest / Bought” to insert a group section for this table. You would select “Addresses” if you wanted to display only addresses in the report.

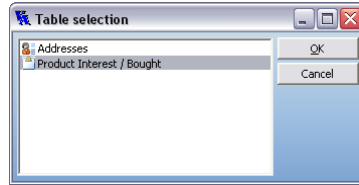


Figure 13: Table Selection

Section Properties

- Right-click in the report area and select “Sections...” from the context menu.
- Select a section and press *Delete* to delete the section
- Select a section and press *Properties*.
 - Unselect “Display/print section” to hide the section.
 - Select “New page” to start a new page for every address.
 - Select “Reset page number” to restart page numbering for every address.
 - For groups you must select a field by which the list will be grouped. This is done in the properties window for the detail section.

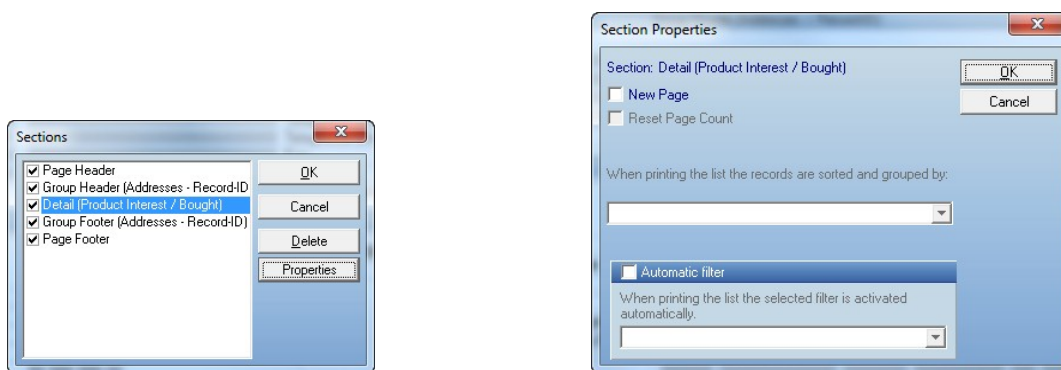


Figure 14: Section Properties

- Automatic filter: When this checkbox is activated, you can then select a filter which will be applied automatically when the list is opened. Usually you will select the filter at runtime, unselecting the checkbox here. The automatic filter is applied e.g. to list open items instead of all items.

Entering Fields and Labels

Select the different field types and graphical elements in the menu bar and place them in the appropriate sections.

- To move a field or element:
Hover over it with the mouse. Click and drag it when the cursor turns into a hand.
- To resize a field or element:
Hover over its border with the mouse. Click and drag the border when the cursor turns into a double-arrow.

Double-click a field or element to modify its properties. Alternatively select a field or element and then click on one of the following icons in the menu bar:



Character modification



Border and background modification



Field processing