

# DataBase

## PROFESSIONAL

### User's Guide



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### *DataBase Professional*

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# Contents

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## ***Getting Started***

### **Installing and Starting DataBase 19**

Introduction.....	19
Installing the Program.....	20
Identifying Your License .....	20
Starting the Program .....	21
Upgrading From an Earlier Version.....	21

### **Learning the Basics 25**

Overview.....	25
Step 1: Setting Up a Database.....	26
Step 2: Entering the Data .....	27
Step 3: Preparing the Data .....	28
Step 4: Printing the Data .....	29

### **Opening a Database 31**

Overview.....	31
Opening Existing Files.....	32
Choosing a Login.....	32
Switching to a Different Login .....	33

### **Getting Help 35**

Overview.....	35
Viewing and Printing the User's Guide .....	35
Using Online Help .....	36

---

# ***Database Management***

## **Setting Up a Database 41**

Overview .....	41
Naming Your Database .....	42
Creating an Administrator Password .....	43
Choosing a Template .....	44
Creating a Custom Database .....	45

## **Customizing the Data Entry Form 47**

Overview .....	47
Adding Fields, Text, and Graphics .....	48
Editing the Properties of a Field .....	48
Setting the Tab Order .....	52
Creating a New Field .....	54
Deleting a Field From Your DataBase File .....	56

## **Working With Calculated Fields 57**

Overview .....	57
Adding a Calculated Field .....	57
Editing the Formula .....	58
Changing the Properties of a Calculated Field .....	59
Deleting a Calculated Field .....	59

---

# ***Data Entry***

## **Importing Data From Other Programs 63**

Overview .....	63
Supported File Formats .....	64
Choosing the File to Import .....	64
Assigning Fields to Import .....	68

## **Entering Data in the Data Entry Window** **69**

Overview .....	69
Viewing the Data Entry Window .....	70
Entering Data in the Fields .....	71
Entering Data in a Rotated Field.....	71
Entering and Editing Data in the History Field .....	71
Placing an Image in a Field.....	74
Creating a New Record.....	75
Moving Between Records.....	75

## **Entering Data in the Data Table** **77**

Overview .....	77
Viewing the Data Table.....	78
Entering Data in the Cells.....	78
Choosing the Data Table Fields .....	79
Changing the Data Table Font .....	80
Changing the Format of the Data Table .....	81

## **Duplicating Data** **83**

Overview .....	83
Copying Data From the Previous Record .....	83
Copying Data to Consecutive Records .....	84
Duplicating Data in the Data Table Cells .....	85
Incrementing Fields .....	86

## **Finding and Replacing Data** **87**

Overview .....	87
Finding a Specific Record.....	87
Using Quick Find.....	88
Using the Find Dialog.....	88
Finding a Record by Number.....	92
Replacing Data.....	92

## **Sorting and Filtering Data** **97**

Overview .....	97
Sorting Your Data .....	98
Filtering Records.....	100

## **Managing Records** **107**

Overview .....	107
Selecting a Group of Records .....	108
Removing Duplicate Records .....	109
Deleting Records .....	110

---

## ***Output Forms***

### **Choosing a Form for Printing** **115**

Overview .....	115
Viewing the Form Library .....	116
Choosing From the Form Library .....	117
Choosing From the Change Form Size Dialog .....	120
Creating a Custom Form Size .....	122
Buying Paper for Your Labels and Forms .....	122

### **Customizing a Form Design** **123**

Overview .....	123
Editing Your Form Design .....	124
Customizing the Output Forms Window .....	126

### **Creating a New Form Design** **129**

Overview .....	129
Using the Form Wizard .....	130
Starting the Form Wizard .....	130
Choosing a Form Size .....	131
Choosing an Image File .....	134
Choosing the Type of Form Design .....	135
Adding an Address to Your Form .....	136
Adding Fields to Other Kinds of Labels .....	138
Designing a Form From Scratch .....	139

### **Working With Design Objects** **141**

Overview .....	141
Selecting a Single Object .....	142
Selecting a Group of Objects .....	143
Moving and Sizing Objects .....	144
Changing the Object Stacking Order .....	145

## **Aligning Objects** **147**

Overview.....	147
Using the Grid.....	148
Using the Align Dialog.....	149
Using an Alignment Box .....	150

## **Adding Text to a Form** **155**

Overview.....	155
Adding Fields for Data .....	156
Deleting Fields.....	158
Adding a Text Box .....	159
Adding a Return Address.....	159
Formatting Text in Fields and Text Boxes .....	160
Adding Headers and Footers to Booklets .....	166
Removing Blank Lines and Spaces .....	166
Sequencing Your Records.....	167

## **Adding Pictures and Drawing Objects** **169**

Overview.....	169
Adding a Background Image .....	170
Adding Clipart .....	172
Drawing Lines.....	176
Drawing Rectangles and Circles.....	177
Changing the Attributes of Drawing Objects .....	179
Adding Objects From Another Program.....	181

## **Using Barcodes** **183**

Overview.....	183
Adding a Postal Barcode.....	184
Adding a Product Barcode .....	185
Changing the Properties of a Product Barcode .....	188
Entering Barcode Data .....	189
Printing Barcodes.....	190

---

## ***Print or Send Data***

### **Printing Output Forms 193**

Overview .....	193
Checking for Data Overflow .....	193
Previewing Your Form .....	195
Skipping Labels or Cards on the First Page .....	196
Printing the Forms .....	197
Using Sheet-Feed Labels .....	198
Using Form-Feed Labels .....	200

### **Printing Envelopes 201**

Overview .....	201
Testing the Envelope Setup .....	201
Changing the Envelope Feed Settings .....	202
Adjusting the Envelope Margins .....	203

### **Printing the Data Table 205**

Overview .....	205
Preparing the Data Table for Printing .....	206
Previewing the Data Table .....	210
Printing the Data Table .....	211

### **Sending Email Messages 213**

Overview .....	213
Writing Email Letters .....	213
Step 1: Setting Email Preferences .....	214
Step 2: Creating an Email Message .....	215
Step 3: Previewing an Email Message .....	227
Step 4: Sending Email Messages .....	227
Establishing Good Email Customer Relationships .....	230

### **Creating Form Letters 235**

Overview .....	235
Using Headers and Footers .....	236
Adding Page Numbers .....	236
Previewing Form Letters .....	237
Printing Form Letters .....	238

---

# ***Reports***

## **Creating Standard Reports 241**

Overview .....	241
Choosing an Existing Standard Report .....	242
Editing a Standard Report .....	243
Setting Up the Page Layout for a Standard Report .....	244
Adding and Removing Columns in the Standard Report .....	245
Sorting and Filtering the Data for the Standard Report .....	248
Determining the Total and Subtotal Configuration .....	249
Setting Readability Options .....	253
Editing Header and Footer Information .....	254
Previewing a Standard Report .....	255
Printing a Standard Report .....	255
Exporting a Standard Report .....	256

## **Creating Custom Reports 257**

Overview .....	257
Choosing a Custom Report .....	258
Organizing Custom Reports .....	259
Creating a Custom Report .....	260
Using the New Report Wizard .....	261
Customizing a Custom Report .....	267
Aligning Objects on a Custom Report .....	276
Grouping, Subtotaling, and Filtering Custom Report Data .....	276
Previewing a Custom Report .....	281
Printing a Custom Report .....	281

---

# ***Program Management***

## **Managing DataBase Files 285**

Overview .....	285
Backing Up Your Files .....	285
Copying Files .....	287
Creating New Files .....	290
Exporting a File to Another Program .....	290
Deleting Files .....	292

## **Managing Settings and Preferences** **293**

Overview .....	293
Updating Personal Settings .....	294
Changing Your Administrator Password.....	295
Updating Missing Information.....	296
Changing Program Preferences.....	297

## **Updating DataBase** **301**

Overview .....	301
Running Avanquest Update.....	302
Automatically Checking for Updates.....	303

---

## ***Reference***

## **Helpful Hints and Troubleshooting** **307**

Using Shortcuts .....	307
Form Design Hints .....	309
Printing Hints .....	313
File Management Hints .....	319

## **Glossary of Terms** **323**

## **Index** **327**

## **Technical Support Policy** **337**



# GETTING STARTED

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<b>Installing and Starting DataBase</b>	<b>19</b>
<b>Learning the Basics</b>	<b>25</b>
<b>Opening a Database</b>	<b>31</b>
<b>Getting Help</b>	<b>35</b>



# Installing and Starting DataBase

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## Introduction

DataBase Professional™ (DataBase for short) is an easy-to-use database program for use with Windows®. DataBase allows you to organize your data using the DataBase templates or create your own custom database. The database is easily shared across your network, allowing multiple users simultaneous access to the data.

You can design and print labels and other forms for the records in your database. Print text and graphics directly on labels using a dot matrix, ink-jet, or laser printer.

DataBase also allows you to calculate values within a data field and to create reports.

We suggest reading the “Getting Started” section of the user’s guide or online help to help you get an overview of the program. The extensive online help can be viewed any time in the program by choosing from the **Help** menu or clicking a **Help** button in a dialog. For more information about the available help options, see [“Getting Help” on page 35](#).

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## Installing the Program

Insert the DataBase CD into your CD-drive to open the setup program. Follow the on-screen instructions to finish installing DataBase.

If the setup program doesn't open, follow the steps below:

1. Open the Windows **Start** menu and choose **Run** to open the Run dialog.
2. Enter the drive letter of your CD-drive followed by a colon (:) and the word `setup`.

For example, if you CD-drive is drive D, enter `d: setup`.

3. Click **OK** and follow the on-screen instructions to finish installing DataBase.

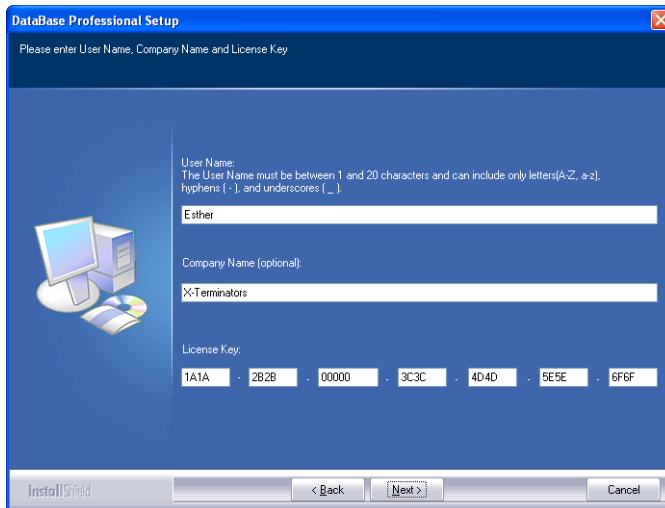
---

## Identifying Your License

Whenever you install DataBase on a computer, you need to enter a unique user name and license. This helps the program keep track of who is working with a database at any given time.

For example, if two people have the same record open at the same time and both make changes, DataBase saves the information when the first person leaves the record. When the second person leaves the record, DataBase displays a message explaining that changes were made to the record by the first person, preventing overwriting of important data.

*To help prevent confusion between letters and numbers, the license key doesn't contain the letter **I** nor the letter **O**. However, it can contain the number **1** or the number **0**.*



Your user name must be between one and twenty characters and can include only letters, hyphens, and underscores. You can optionally enter your company name.

---

## Starting the Program



To start DataBase, open the **Start** menu and choose **Programs > MySoftware > DataBase Professional**.

You can also start the program by double-clicking the **DataBase Professional** icon on your desktop.

---

## Upgrading From an Earlier Version

This version of DataBase Professional has several improvements from the previous version of the program:

- A new image field type allows you to store image files in separate records (see [“Placing an Image in a Field” on page 74](#)).
- More sorting and editing features are available in the Data Table (see [“Entering Data in the Data Table” on page 77](#)).
- Improved filtering allows saving and reusing filters (see [“Filtering Records” on page 100](#)).
- The new Form Wizard helps you create custom output forms for your data (see [“Creating a New Form Design” on page 129](#)).
- The fields in an alignment box can be locked and unlocked (see [“Using an Alignment Box” on page 150](#)).
- Enhanced email functionality includes HTML formatting (see [“Sending Email Messages” on page 213](#)).
- New custom report designer allows you to create full-page reports using the fields and layout that you want (see [“Creating Custom Reports” on page 257](#)).

## Updating a Previous Database

This version of DataBase is able to open all previous versions of DataBase. All of your data, designs, and reports will continue to be available with this version of the program. For more information about opening a DataBase file, see [“Opening Existing Files” on page 32](#).

You can convert a file that was created by MyDataBase version 2.0 or later. Converting a file creates a new DataBase file containing the data and designs from your old MyDataBase file. Your old file remains unchanged.

Since your email preferences aren’t saved with each MyDataBase file, you’ll need to enter your email preferences using DataBase. For more information about sending email, see [“Sending Email Messages” on page 213](#).

You can also import the data files from many software programs, including MyContactManager and MyDataBase. However, importing doesn’t include your old designs. Calculated fields are also not imported. You might want to keep your old files until you duplicate your designs and calculations in DataBase.

If you’re installing this version on a new computer and want to upgrade the database that is saved on another computer that isn’t connected to your network, you need to transfer the main file and all of the supporting files to the new computer before upgrading the database. For information about which files to move to your new computer, see “Transferring Files to Another Computer” in the online help or user’s guide that came with your previous version.



**NOTE:** If you’re having difficulty opening or importing data from your old file, try using the previous program to export the data into a \*.csv file and then use this version to import the data from the \*.csv file (see [“Importing Data From Other Programs” on page 63](#)).

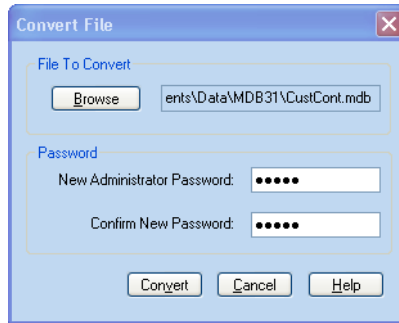
---

*If you want to convert a MyDataBase file without first creating a new DataBase file, click **Open** in the DataBase Professional Startup dialog and then click **Cancel**.*

## Converting a MyDataBase File

Converting a MyDataBase 2.0 or later file creates a new DataBase file containing the data and designs from your old file.

1. Open the **File** menu and choose **Convert MyDataBase File** to open the Convert File dialog.



2. Click **Browse** to open the Open database file name dialog.
3. Locate and select the file you want to convert.  
If you're converting a MyDataBase 2.0, open the **Files of type** drop-down list and choose **MyDataBase File (\*.mdb)**.
4. Click **Open** to return to the Convert File dialog.
5. Enter the same Administrator password in both **Password** boxes (see [“Creating an Administrator Password” on page 43](#)).
6. Click **Convert** to open the Save As dialog.
7. Enter a name for your new DataBase file (see [“Naming Your Database” on page 42](#)).  
If you're saving the new file in the same folder as the old file, you need to use a different name for the new file.
8. Click **Save** to convert the file to the new version.

During the conversion, DataBase creates a **Backup** folder in the same location as your original file and saves your original file in this folder. The new file is opened using the new name you entered.



**NOTE:** If you're converting from a MyDataBase 2.0 file, custom reports might not be converted properly, some of the form designs might need to be adjusted, and calculated fields are converted to numeric fields in your new DataBase file.

*If you're having difficulty importing data from your old file, try using the previous program to export the data into a \*.csv file and then use this version to import the data from the \*.csv file.*

## Importing From MyDataBase

MyDataBase was originally designed as a single-user database program. DataBase allows multiple users access to the data in the database. As a result, some compatibility issues prevent DataBase from efficiently using all of the data, designs, and reports from older MyDataBase files.

For example, calculated fields from your MyDataBase file are converted to numeric fields in your DataBase file. These fields can't be converted back, so you'll need to create new calculated fields to replace them. For more information, see [“Working With Calculated Fields” on page 57](#).

Importing the data adds the data from your old file to a new file. None of your designs are imported. In the DataBase file, you'll need to recreate any custom output designs or reports you had created using MyDataBase.

For more information, see [“Importing Data From Other Programs” on page 63](#).

## Importing From MyContactManager

DataBase isn't a direct upgrade for MyContactManager, but it can import the data into similar templates. Be sure to map your **Contact History** field to the **History** field in DataBase.

If you created any custom designs, they aren't imported. However several DataBase templates have similar fields and designs as the templates with the same names used in MyContactManager. For information about DataBase templates, see [“Choosing a Template” on page 44](#).

When you import the data, you need to map the field names from the MyContactManager file to the field names in the DataBase template. In some cases the field names for the business addresses and home addresses might be assigned incorrectly when the Assign Import Fields dialog opens. To correct this, click the **Reassign All** button and map each field again.

For information about importing, see [“Importing Data From Other Programs” on page 63](#).



# Learning the Basics

---

## Overview

There are four basic steps to creating a database and printing forms using DataBase:

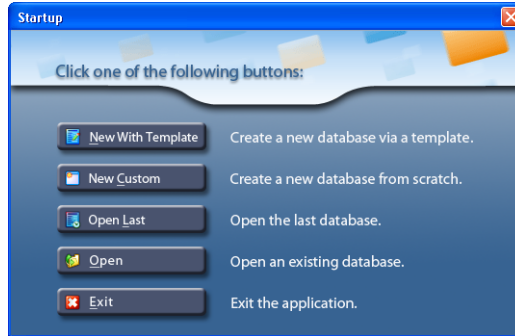
- [Step 1: Setting Up a Database \(see page 26\)](#)
- [Step 2: Entering the Data \(see page 27\)](#)
- [Step 3: Preparing the Data \(see page 28\)](#)
- [Step 4: Printing the Data \(see page 29\)](#)

These steps are outlined in this chapter. For more complete information, see the following chapters or the online help.

---

## Step 1: Setting Up a Database

Each time you start DataBase, the DataBase Professional Startup dialog appears allowing you to choose what you want to work on.



*If you want to convert a MyDataBase file without first creating a new DataBase file, click **Open** in the DataBase Professional Startup dialog and then click **Cancel** (see “Converting a MyDataBase File” on page 23).*

- **New With Template** allows you to create your database using a DataBase template.
- **New Custom** allows you to design your own custom database.
- **Open Last** allows you to open the database you were working on when you last used DataBase.
- **Open** allows you to choose a database you have previously saved using DataBase.
- **Exit** closes the program.

Whenever you setup a new database, you first must enter a name for the new file. If you’re creating a shared database, be sure to save the database in a shared folder where others on your network can access it. For information about naming and saving a new database, see [“Naming Your Database” on page 42](#).

After naming your database, DataBase asks you to login as the administrator of the database. For information about your initial login, see [“Creating an Administrator Password” on page 43](#).

You can either start with a template or create a custom database, depending on the choice you made in the DataBase Startup dialog. For information about setting up the initial fields for your database, see [“Choosing a Template” on page 44](#) or [“Creating a Custom Database” on page 45](#).

When you finish choosing your template or custom fields, DataBase opens to the Data Entry form, where you can edit your records. You can customize the Data Entry form to fit your needs. For information about making changes to the Data Entry form, see [“Customizing the Data Entry Form” on page 47](#).

## Step 2: Entering the Data

After setting up your database you can begin entering data in the Data Entry form.

Database Professional - [C:\Documents and Settings\WY\Documents\Data\Addresses.esd]

File Edit Insert View Format Data Engr User Management BusinessTools Help

Data Entry Data Table Output Forms Standard Reports Custom Reports Email

New Record Edit Data Entry Form Record#1 First Name

**Contacts Basic**

First Name  Company   
Last Name  Title   
Address 1   
Address 2   
City  State  Zip Code   
Phone   
Alt Phone   
Email   
Follow Up Date

Date	Activity	Regarding

Ready Records: 0 Filtered: 0 Sort: Form Custom1

Click the field where you want to enter or edit data. The name of the selected field appears above the record. If you're using a form that displays field names inside of the edit boxes, the field name disappears when you click a field or after you enter data into it.

To change the order that you move through the fields when you press TAB or ENTER, see [“Setting the Tab Order” on page 52](#).

You can also use the Data Table to enter data or to view your database in a table. In the Data Table window, you can select groups of records to print, or even print your data in a table.

To select a record in the Data Table, click the record number on the left.

	Last Name / 1	First Name / 2	Title	Company / 3	Address 1	City	State	Zip Co
1	Andrews	Sarah	Sales Manager	Treasured Possess	313 Madison Lane	Hillsborough	CA	94010
2	Andrews	W. M.		W. M. Andrews Cor	210 E. Texas Street	Colma	CA	94014-7941
3	Beatty	Calle	Managing Editor	Beatty Home Comp	416 S. Region Street	Palo Alto	CA	94303-2886
4	Bennie	Marvin	Foreman	MB Well Digging	1026 Cibi Lane	Los Altos	CA	94022-3901
5	Berthoff	Hellen	Legal Analyst	Kiowa Accounting	722 New York Ave	Mountain View	CA	94043-2805
6	Bolz	Louise	Machine Operator	LEB Engineering	123 Cleveland Way	Burlingame	CA	94010-0884
7	Boukese	Mary	Administrative Ass	Century Personnel	281 Louisiana Ave	Los Gatos	CA	95030-8822
8	Clementine	Nathan	Proprietor	Clementine Natural	529 Kentucky Circle	Palo Alto	CA	94306-7815
9	Collins	Isaac	Agent	Collins Insurance G	768 Greenbriar Driv	San Jose	CA	95136-1802
10	Cookman	Susannah	Logistics Coordinat	LMN Services	1012 Anderson Cou	Los Altos	CA	94022-4834
11	Crafts	Frances	Executive Secretar	Bookkeepers Anony	623 Moonbeam Way	Campbell	CA	95008-6934
12	Curry	Margaret	Human Resources	JoSasc Engineering	387 Augusta Way	Campbell	CA	95008-9755
13	Dale	Bennie	Owner	Dale's Landscape M	918 Cibi Way	Alhiso	CA	95002-7925
14	Dirks	Walter	Vice President, Oper	Couner Customizing	1130 Archer Street	Cupertino	CA	95014-3955
15	Douglas	Alexander	President	The Achiever Group	515 Taurus Court	San Jose	CA	95118-5891
16	Dunn	Georgia	Shift Supervisor	Lizzie's Foods	222 Oklahoma Way	Redwood City	CA	94063-4906
17	Edgar	Frank	Owner	Frank's Truck Stop	802 Boston Avenue	Mountain View	CA	94043-1911
18	Edwin	George	Personnel Director	Prairie Products Cor	316 Texas Drive	Millbrae	CA	94030-1876
19	Engel	Louise	Estimator	Rosedale Construct	1211 Fredricksburg	Pacificia	CA	94044-0855
20	Floyd	William	Attorney	Andrews, Floyd, an	311 Ringo Drive	Monte Sereno	CA	95030-9814
21	Gallup	Jo Ann	Archivist	Nickell Research	246 Stratford Aven	Redwood City	CA	94065-0872

Ready Records: 50 Filtered: 50 Sort: Last Name Form: 4" x 3 1/2" Shipping

For more information about entering data, see [“Data Entry” on page 61](#).

---

## Step 3: Preparing the Data

DataBase allows you to sort your data, filter records, and delete records before you create reports or print forms.

Use the Sort dialog to change the order that your records display and print. For information about sorting your data, see [“Sorting Your Data” on page 98](#).

Filtering allows you to view and print only those records that meet the criteria you set. For information about filtering your data, see [“Filtering Records” on page 100](#).

DataBase can search for and remove duplicate records from your file. This can be a useful feature if you have imported information from several different files. For more information about removing duplicate records, see [“Removing Duplicate Records” on page 109](#).

---

## Step 4: Printing the Data

After adding data for the records, you're ready to design and print your output forms.

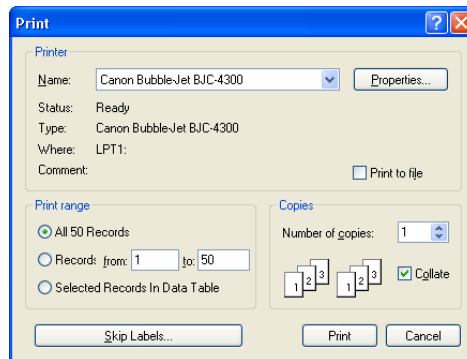
You can print forms using the Data Entry design or you can create a design in the Output Forms window.

For example, you might want to create a special design for a seasonal sale or event using the Output Forms window. The form in the Data Entry window is saved along with any forms you create in the Output Forms window.

Design your output form the way you want it to print using the Output Forms window (see [“Output Forms” on page 113](#)).

To preview your output forms before you print them, open the **File** menu and choose **Print Preview > Active Output Form**.

To print your data, either click the **Print** button in the Preview window or open the **File** menu and choose **Print > Active Output Form**.



You can also print your data in the Data Table format and in reports.

For more information about printing, see [“Print or Send Data” on page 191](#).



# Opening a Database

---

## Overview

Each DataBase file can be simultaneously opened by multiple Regular users. Every time a database file is opened, a login is required. If you're the administrator of a database, you can switch between Regular user and Administrator logins while the database is open.

DataBase files are designed to be accessed across a network. Since the only password requirement is for Administrator access, the database can be opened and modified by any Regular user. If you want to restrict access to the database, you can restrict access to the folder where the database is saved using Windows network permissions (see your Windows documentation or contact your network administrator).

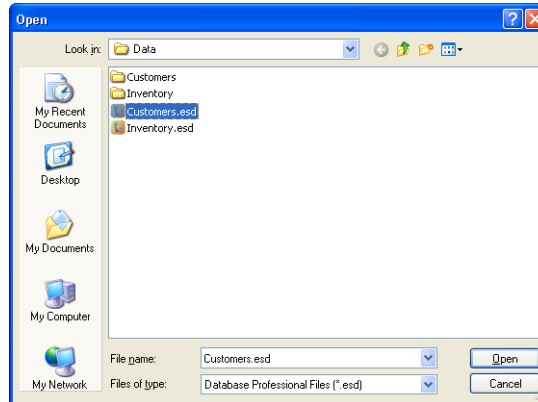
DataBase tracks the users of a database to help prevent accidental loss of data. When conflicts occur, users are notified of the conflict and given choices of how to proceed.

---

## Opening Existing Files

Although DataBase allows multiple users on different computers to open the same file, only one DataBase file at a time can be open on a computer. When you open another file, the current file is closed. DataBase automatically saves any changes you made to the current file before closing it.

1. Open the **File** menu and choose **Open** to display the Open dialog.



2. Locate the drive and folder where you saved the file.
3. Click the file that you want to open to select it.
4. Click **Open**.

---

## Choosing a Login

Each time you open a file, DataBase asks you to login.



You can login as a **Regular user** or the **Administrator**. If you login as the Administrator, you need to enter the password.

Choose your login and click **OK** to open the database.



## Regular User Login

When you login as a Regular user, anyone else on the network can also login to the same database as a Regular user. If the Administrator has the database open, you won't be able to open the database until the Administrator closes the database.

As a Regular user, you can view and edit all of the records in the database. However, you can't import data from other programs, or backup and restore the database.

You have the choice of using shared or personal forms, emails, and reports. You can't edit the shared forms, emails, and reports. However, you can create and edit personal forms, emails, and reports using the data in the database. Personal forms, emails, and reports can't be shared by other users.

## Administrator Login

When you login as the Administrator, no other user on the network can open the same database while you have it open. If any Regular users have the database open before you login, you won't be able to login as administrator until they close the database. The Administrator can login using any computer on the network that has DataBase installed on it.

As the administrator you can view and edit all of the records in the database just like a Regular user. Only the administrator can import data from another file, or backup and restore the database.

The administrator doesn't have access to personal forms, emails, or reports. However, the administrator can create and edit the shared forms, emails, and reports.

---

## Switching to a Different Login

If you're the database administrator, you can switch between Regular user and Administrator logins. For example, you might want to edit a shared email as the administrator and then switch to a Regular user login so you can send the email.

To switch your current login, open the **User Management** menu and choose **Change User Mode** to open the Select User Mode and Enter Password dialog (see [“Choosing a Login” on page 32](#)).



# Getting Help

---

## Overview

DataBase includes a comprehensive user's guide and complete online help that is available while using the program.

---

## Viewing and Printing the User's Guide

To view or print the online user's guide, open the **Help** menu and choose **DataBase Professional User's Guide**.

If there wasn't enough room on your computer to install the user's guide, you can open the DataBaseProfessional.pdf file in the User's Guide folder on the program CD.

After the user's guide opens in Acrobat Reader, you can view it on-screen, print the entire document, or print just the pages you need.

For complete information about using Acrobat Reader, see the Acrobat Reader online help or contact Adobe technical support.

### ***To Print the User's Guide***

1. Open the Acrobat Reader **File** menu and choose **Print** to open the Print dialog.  
The name of the selected printer appears at the top of the Print dialog. If this isn't the printer you want to use, click the **Setup** button in the dialog and then choose another printer.
2. Choose the pages you want to print from the **Print Range** area.
3. Click **OK** to begin printing the user's guide.

## Using Online Help

The online help for DataBase offers many features to help you find the information you need.

To view the online help, open the **Help** menu and choose **DataBase Professional Help** or click a **Help** button in a dialog.



Browse

To view a help topic, click a title in the **Contents** tab on the left side of the help window. To view an alphabetical index, click the **Index** tab. You can also click the **Browse** buttons to browse through the help topics.

## Using ToolTips

DataBase also supports ToolTips. When the ToolTips feature is turned on, a brief explanation appears when you pause your cursor over a button.

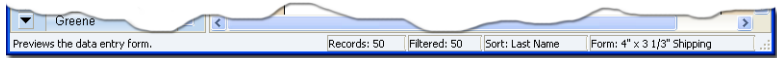


To switch the ToolTips on or off, open the **View** menu and choose **Toolbars**, and then mark or clear the **Show ToolTips** check box in the Toolbars dialog.

## Using the Status Bar

The status bar across the bottom of the DataBase window displays extended tips for menu items and buttons. It also displays information about the current file.

To view a tip in the status bar, point the cursor at a button or highlight a menu item. For example, point at the **Print Preview** button in the Data Entry window to display this information at the bottom of the window:



To the right of the tip, the status bar tells you other useful information, such as the number of records in your database, the number of records that are currently displayed, how the file is sorted, and the name of the currently selected form.

To switch the status bar on or off, open the **View** menu and choose **Status Bar**.



# DATABASE MANAGEMENT

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Setting Up a Database	41
Customizing the Data Entry Form	47
Working With Calculated Fields	57





# Setting Up a Database

---

## Overview

You can set up a new database when you first start the program or after the program is already open.

- To set up a new database when the program starts, click either the **New With Template** or **New Custom** button in the DataBase Professional Startup dialog.
- To set up a new database after the program is already open, open the **File** menu and choose either **New With Template**, **New Custom File**, or **New With Current Design**.

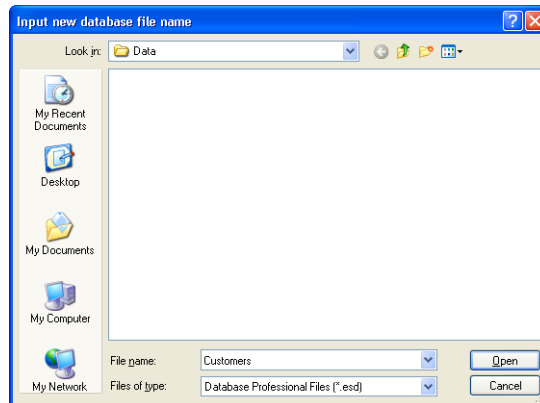
Whenever you set up a new database, you must first enter a name for the new file. After naming the file, DataBase asks you to login as the administrator of the database. Then, you can choose a template or create a custom database.

When you finish choosing your template or custom fields, DataBase opens to the Data Entry form. As the database administrator, you can customize the Data Entry form to fit your needs by creating or deleting fields and placing them on the form in a way that makes it easy for you to enter the data for your records.

---

## Naming Your Database

The first step for creating a new database is entering a name for the file.



Open the **Look in** drop-down list in the Input New Database File Name dialog to locate the folder where you want to save the database. If you plan to share the database, be sure to choose a folder that is shared on your network, so that other computers can access it.

You can enter any name you want for the database. When DataBase saves the file, it creates a folder with the same name as the file to hold the supporting files for the database. So, make sure that the file's name doesn't match the name of a folder already in the folder where you want to save the database.

When you're ready to open the database, click **Open**.

---

## Creating an Administrator Password

When you create a new database, you're the administrator. The password you enter in the Select User Mode and Enter Password dialog will be required each time you open the database as the administrator.



Enter a password between zero and thirty characters long.

Each database that you administer can have a different password. The Administrator password isn't needed when the database is opened by a Regular user.

For more information, see [“Choosing a Login” on page 32](#).



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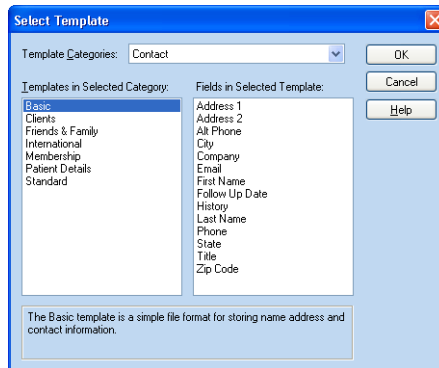
**NOTE:** You can't use the DataBase program to recover the password for a database file. Be sure to keep the password in a safe place, so you'll be able to open the database if you forget the password.

---

---

## Choosing a Template

DataBase allows you to choose from several database templates with predefined fields. To open the Select Template dialog, click **New With Template** in the DataBase Professional Startup dialog or open the **File** menu and choose **New With Template**. After you give the new database a name and enter an Administrator password, the Select Template dialog opens.



1. Click the **Template Categories** drop-down arrow and choose a category.
2. Choose a template listed in the **Templates in Selected Category** box.
3. View the available fields for the template in the **Fields in Selected Template** box.

If you can't find the exact template you want, choose one that closely matches your needs and then customize the Data Entry form.

4. After you finish choosing a template, click **OK** to close the Select Template dialog.

---

## Creating a Custom Database

DataBase allows you to design a custom database with the fields you need for your data. Create and define text, numeric, and currency fields for your data using the Create Custom Database dialog.

To open the Create Custom Database dialog, choose **New Custom** in the DataBase Professional Startup dialog or open the **File** menu and choose **New Custom File**. After you give the new database a name and enter an Administrator password, the Create Custom Database dialog opens.

**Create Custom Database**

Field Name: Amount Create Field

Field Type

☐ Text ☐ Date ☐ Checkbox  
☐ Numeric ☐ Phone ☐ Listbox  
☐ Currency ☐ ZIP Code ☐ History  
☐ Notebox ☒ Calculated ☐ Image

Listbox Entries  
Formula

Field Length: 30

Fix Decimal: 2

Output Format: Fixed, Comma, Percent, Scientific, **Currency <Control Panel>**

Defined Fields:

Field Name	Type	Size
Quantity	Number	30.2
Item	Text	40
Price	Currency	15.2
...	...	...

Delete Field

[Click the OK button to leave this dialog and create the new database.]

OK Cancel Help

For each new field you create, give the field a name and then choose the field type and the output format. When you finish defining each field, click the **Create Field** button near the top of the dialog to add the field name to the **Defined Fields** list near the bottom of the dialog (see [“To Create a Field for Your Database” on page 46](#)).

If you want to remove a field from the **Defined Field** list, choose the field in the list and then click the **Delete Field** button (see [“To Delete a Field in Your Custom Database” on page 46](#)).

You can’t change the settings of the fields in the Create Custom Database dialog after you create them. However, you can continue to add, remove, and customize fields in the Edit Data Entry Form window after you close this dialog.

After defining your initial fields, click **OK** to open the Data Entry window.

## ***To Create a Field for Your Database***

1. Enter a field name in the **Field Name** box.
2. Choose a **Field Type** option.
  - To add items to a Listbox field, click **Listbox Entries** (see [“Editing List Box Fields” on page 50.](#))
  - To create a formula for a Calculated field, click the **Formula** button (see [“Adding a Calculated Field” on page 57.](#))
3. For Text and Listbox fields, you can set the character length of the field in the **Field Length** box.



**CAUTION:** After you have created a new field, the Field Length is fixed and can't be modified.

---

4. Choose an Output Format from the list displayed in the **Output Formats** box.

The available Output Formats are specific to the Field Type (see [“Choosing the Output Format” on page 56.](#))

You can set the decimal placement when you choose a **Numeric** field with a **Fixed** Output Format.
5. To add the field to your custom database, click the **Create Field** button.
6. To continue adding fields to your database, repeat steps **1–5**.
7. When you finish creating the fields in your custom database, click **OK** to close the Create Custom Database dialog.

## ***To Delete a Field in Your Custom Database***

1. Select the field you want to delete in the **Defined Fields** box.
2. Click the **Delete Field** button.

When you finish creating the fields in your database, click **OK** to close the Create Custom Database dialog.

After you create a custom database, you can still add, modify, and delete fields (see [“Customizing the Data Entry Form” on page 47.](#))

# Customizing the Data Entry Form

## Overview

The Data Entry form can be customized only by the administrator of the database. If you're the administrator of the database and logged in as a Regular user, you need to switch to Administrator login before customizing the Data Entry form (see [“Switching to a Different Login” on page 33](#)).

Customize your Data Entry form by adding the fields, text, and graphics you need in your database, rearranging the fields, and setting the tab order. To customize your Data Entry form, open the Edit Data Entry Form window by clicking the **Edit Data Entry Form** button.

Properties Toolbar

Object Toolbar

The screenshot shows the 'DataBase Professional' window with the 'Contacts Basic' form. The form has a blue header and contains several text input fields. On the left, there are two toolbars: the 'Properties Toolbar' (indicated by an arrow) and the 'Object Toolbar' (indicated by an arrow). The 'Object Toolbar' includes buttons for adding new fields, deleting fields, and changing the tab order. The 'Properties Toolbar' includes buttons for setting field properties like name, type, and format. The form fields are arranged in a grid-like structure with labels on the left and input boxes on the right.

---

## Adding Fields, Text, and Graphics

Using the Object Toolbar, you can add fields, text boxes, and objects to your Data Entry form.

- *Fields* are place holders for data, such as names and addresses. Every DataBase file has a set of fields for you to add and place on your database design (see [“Adding Fields for Data” on page 156](#)).
- *Text boxes* are used for text that you want to display or print the same on every form, such as the return address on a shipping label (see [“Adding a Text Box” on page 159](#)).
- *Objects* are shapes, lines, and clipart that you can add to your database design (see [“Adding Pictures and Drawing Objects” on page 169](#)).

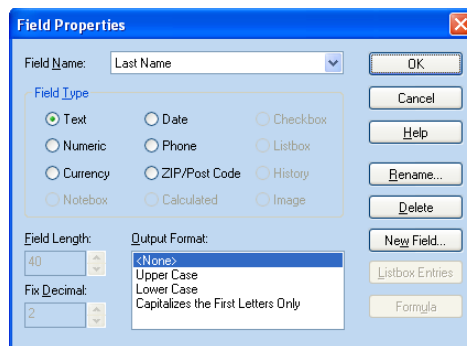
To quickly add a mailing address to your form, click the Mailing Address button in the Object Toolbar (see [“Adding a Mailing Address Group” on page 156](#)).

---

## Editing the Properties of a Field

Use the Field Properties dialog to change the format of a field in the current form. The formats that are available depend on the selected field.

1. Open the Edit Data Entry Form window.
2. Open the **Format** menu and choose **Field Properties** to open the Field Properties dialog.



3. Choose the field you want to change from the **Field Name** drop-down list.
4. Change the type of field by selecting an option in the **Field Type** box.



5. Choose an **Output Format** from the list.

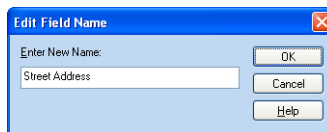


**NOTE:** The formats that are available depend on the selected field.

- To create a new field, click the **New Field** button (see [“Creating a New Field” on page 54](#)).
  - To edit the available items in a list box field, click the **Listbox Entries** button (see [“Editing List Box Fields” on page 50](#)).
  - To edit the formula for a calculated field, click the **Formula** button (see [“Editing the Formula” on page 58](#)).
6. Click **OK** to close the Field Properties dialog.

## Renaming a Field

1. Make sure you’re in the Edit Data Entry Form window.
2. Open the **Format** menu and choose **Field Properties** to open the Field Properties dialog.
3. Choose the field you want to rename from the **Field Name** drop-down list.
4. Click the **Rename** button to open the Edit Field Name dialog.



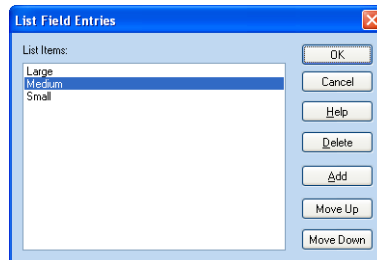
5. Type the new field name.
6. Click **OK** to close the Edit Field Name dialog.
7. Click **OK** again to close the Field Properties dialog.

## Editing List Box Fields

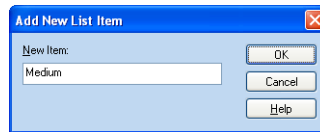
When you create a list box field, you can add, move, and delete the items in the list box.

### *To Add Items to a List Box*

1. Open the Edit Data Entry Form window.
2. Open the **Format** menu and choose **Field Properties**.
3. Choose the list box's field name from the **Field Name** list.
4. Click the **Listbox Entries** button to open the List Field Entries dialog.



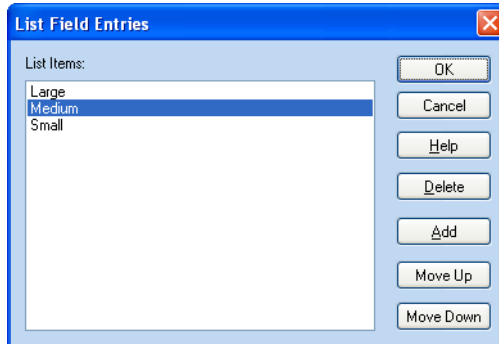
5. Click the **Add** button to open the Add New List Item dialog.



6. Type the text for the new list item.
7. Click **OK** to add the item and view the new list.
8. Click **OK** to close the List Field Entries dialog.
9. Click **OK** to close the Field Properties dialog.

### ***To Move Items in a List Box***

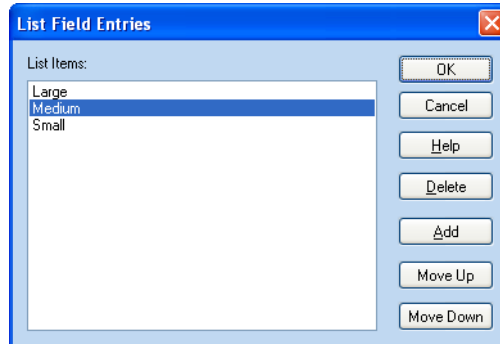
1. Make sure you're in the Edit Data Entry Form window.
2. Open the **Format** menu in the and choose **Field Properties** to open the Field Properties dialog.
3. Choose the list box's field name from the **Field Name** list.
4. Click the **Listbox Entries** button to open the List Field Entries dialog showing the available choices.



5. Click on the list item you want to move.
6. Click the **Move Up** or **Move Down** button to reposition the item.
7. Click **OK** to close the List Field Entries dialog.
8. Click **OK** to close the Field Properties dialog.

## ***To Delete Items From a List Box***

1. Make sure you're in the Edit Data Entry Form window.
2. Open the **Format** menu in the and choose **Field Properties** to open the Field Properties dialog.
3. Choose the list box's field name from the **Field Name** list.
4. Click the **Listbox Entries** button to open the List Field Entries dialog showing the available choices.



5. Click on the list item you want to remove.
6. Click the **Delete** button.
7. Click **OK** to close the List Field Entries dialog.
8. Click **OK** to close the Field Properties dialog.

---

## **Setting the Tab Order**

You can change the order that the cursor moves through the fields in the Data Entry window when you press TAB or ENTER. You can even set it to skip rarely used fields.

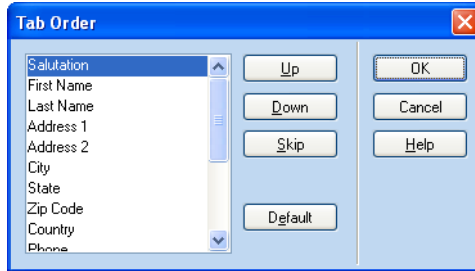


**NOTE:** Setting the tab order only effects the order of the fields for data entry; it doesn't change the layout of the Data Entry form.

---

### ***To Set the Tab Order***

1. Open the Edit Data Entry Form window.
2. Open the **Format** menu and choose **Tab Order** to open the Tab Order dialog.



3. Set the tab order:
  - To move a field earlier in the order, click the field name and then click the **Up** button.
  - To move a field later in the order, click the field name and then click the **Down** button.
  - To skip a field (or to include a field that is currently skipped), click the field name and then click the **Skip** button.
4. Click **OK**.

---

## Creating a New Field

Only the administrator of the database can add new fields. If you're the administrator of the database and logged in as a Regular user, you need to switch to Administrator login before creating a new field (see [“Switching to a Different Login” on page 33](#)).



Create new fields in the Edit Data Entry Form window. To create a new field, click the **New Field** button in the Object toolbar, or click the **New Field** button in the Field Properties dialog (see [“Editing the Properties of a Field” on page 48](#)).

A screenshot of the 'Create New Field' dialog box. It has a title bar with a close button. Inside, there's a 'Field Name' text box with 'Amount' entered. Below it is a 'Field Type' section with radio buttons for Text, Date, Checkbox, Numeric, Phone, Listbox, Currency, ZIP/Post Code, History, Notebox, Calculated (selected), and Image. To the right of these are buttons for OK, Cancel, Help, Listbox Entries, and Formula. At the bottom, there's a 'Field Length' section with '30' in a spin box and a 'Fix Decimal' section with '2' in a spin box. To the right of these is an 'Output Format' list box with options: Fixed, Comma, Percent, Scientific, and Currency (Control Panel) (selected).

1. Enter a unique field name in the **Field Name** box.  
The field name appears in the field list and on your forms.
2. Choose a **Field Type** option (see [“Choosing the Field Type” on page 55](#)).

If you're creating a **Text** or **Listbox** field, you can set the character length of the field in the **Field Length** box.



**CAUTION:** After you have created a new field, the Field Length is fixed and can't be modified.

*The available Output Formats depend on the Field Type.*

3. Choose an **Output Format** from the list (see [“Choosing the Output Format” on page 56](#)).  
You can set the decimal placement when you choose a **Numeric** field with a **Fixed** Output Format.
4. Click **OK** to add the field to your database.

## Choosing the Field Type

DataBase allows you to choose from several different types of fields.

<b>Text</b>	A text field is the standard, single-line data entry field. Unless you need special formatting or multiple lines of data in the field, choose this field type.
<b>Numeric</b>	Numeric fields accept only numbers. Text characters aren't allowed. Numeric fields can be used in the formula of a calculated field.
<b>Currency</b>	Currency fields take their output format from your system settings. For example, U.S. dollars will always appear and print with a dollar sign (\$) on the left and two places after the decimal. Currency fields can be used in the formula of a calculated field.
<b>Notebox</b>	Notebox fields are similar to text fields, except that you can enter more than one line of data. Use notebox fields for unstructured, miscellaneous information in your records. Notebox fields don't appear or print in the Data Table.
<b>Date</b>	Date fields can print in the system-defined long or short date formats. You can use the date field in reports to subtotal by year, month, or day. Use the Preferences dialog to change the data entry and display format of date fields (see <a href="#">“Changing Date Field Preferences” on page 298</a> ).
<b>Phone</b>	Phone fields can be used to copy and paste phone numbers into your dialing or fax programs. Choose the output format that works best in these programs.
<b>ZIP Code</b>	ZIP Code fields are used to define the special mailing code used by the U.S. Postal Service.
<b>Calculated</b>	Calculated fields are used to perform mathematical calculations on the numeric and currency fields in your database (see <a href="#">“Working With Calculated Fields” on page 57</a> ).
<b>Checkbox</b>	Checkbox fields are used to enter simple yes or no answers, such as whether or not you have permission to send email to the people in your database.
<b>Listbox</b>	Listbox fields allow you to choose from a list of items to enter into the field. To add items to the list, click the <b>Listbox Entries</b> button (see <a href="#">“Editing List Box Fields” on page 50</a> ).
<b>History</b>	History fields allow you to enter date-stamped and task-defined lines of data. You can use a history field to keep a record of calls to customers or to track shipments (see <a href="#">“Entering and Editing Data in the History Field” on page 71</a> ). History fields don't appear or print in the Data Table.
<b>Image</b>	Image fields allow you to use different images for each record in a database (see <a href="#">“Placing an Image in a Field” on page 74</a> ).

## Choosing the Output Format

The output formats that are available in the list depend on the type of field you choose to create. For example, text fields can be unformatted (<None>) or in all upper-case, all lower-case, or title-case (**Capitalizes the First Letters Only**).

Certain field types, such as number, currency, and date fields, derive their output formats from your system settings that are set in the Windows Control Panel. For information about changing your system settings, see your Windows documentation.

When you choose a fixed decimal format for a numeric field, you can enter the number of digits to display after the decimal by entering a number in the **Fixed Decimals** box.

Since the output formats are designed for how your data will look when printed, the format might not appear in the Data Entry form. To view your output formats, open the Print Preview window (see [“Previewing Your Form” on page 195](#)).

---

## Deleting a Field From Your DataBase File

*Before deleting a field from your database, you should make a backup (see [“Backing Up Your Files” on page 285](#)).*

Only the administrator of the database can remove fields from the database. If you’re the administrator of the database and logged in as a Regular user, you need to switch to Administrator login before deleting a field from the database (see [“Switching to a Different Login” on page 33](#)).

You can permanently delete fields from your database and from all of your forms in the Edit Data Entry Form window. If you only want to remove the field from a form or from the Data Table, see [“Deleting a Field From a Form” on page 158](#) or [“Choosing the Data Table Fields” on page 79](#).



**CAUTION:** Deleting a field from your database also deletes any data stored in that field.

- 
1. Open the **Format** menu and choose **Field Properties** to open the Field Properties dialog.
  2. Choose the field that you want to delete from the **Field Name** list.
  3. Click the **Delete** button to permanently remove the field from your file and forms.
  4. Click **OK** to close the Field Properties dialog.



# Working With Calculated Fields

---

## Overview

There might be times when you want to use the fields in your database to make calculations and display the result in another field. You can create calculated fields using numeric and currency field types. For example, you could create a field that calculates the total price of an order or the number of days worked per year.

Only the administrator of the database can create or edit calculated fields. If you're the administrator of the database and logged in as a Regular user, you need to switch to Administrator login before creating or editing a calculated field (see [“Switching to a Different Login” on page 33](#)).

---

## Adding a Calculated Field

Create a calculated field by creating a new field in the Edit Data Entry Form window.



New Field

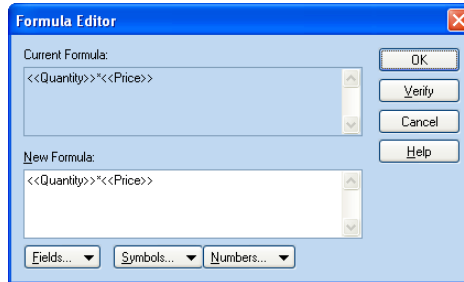
1. Click the **Edit Data Entry Form** button in the Data Entry window to open the Edit Data Entry Form window.
2. Click the **New Field** button to open the Create New Field dialog.
3. Enter a name for the calculated field in the **Field Name** box.
4. Choose the **Calculated** option.
5. Click the **Formula** button to add a formula to the Calculated field (see [“Editing the Formula” on page 58](#)).
6. When you finish creating the formula for the calculated field, click **OK** to return to the Create New Field dialog.
7. Click **OK** to add the Calculated field to your database.

---

## Editing the Formula

Using the Formula Editor, you can create formulas using numeric and currency fields, symbols, and numbers.

To open the Formula Editor, click the **Formula** button in either the Field Properties dialog or the Create New Field dialog.



### Adding Existing Fields to the Formula

To add a Numeric or Currency field to a formula, click the **Fields** button and then choose a field from the list.

You can't add a Calculated field to a formula. To use the calculation from a Calculated field in a formula, copy the calculation from the formula for the original field and then paste it into the formula for the new field.



**NOTE:** If the **Fields** button is dimmed, you don't have any Numeric or Currency fields in your database. Only Numeric and Currency fields can be used in a the formula of a Calculated field.

---

### Adding Mathematical Symbols to the Formula

Click the **Symbols** button to choose the mathematical symbol that you want to use in the formula and place it at the current cursor position.

Choose one of the following symbols:

- ( Start of a grouping
- ) End of a grouping
- \* Multiplication
- / Division
- + Addition
- Subtraction

## Entering Numbers in the Formula

Position the cursor where you want the number, and then press the number keys on your keyboard or click the **Numbers** button and choose a number from the list.

## Checking for an Invalid Formula

To make sure that your formula is valid, click the **Verify** button. If the formula you entered isn't acceptable, a message displays information about the problem.

---

## Changing the Properties of a Calculated Field

You can format the characters in a calculated field just like any other field using the buttons in the Properties Toolbar or the options in the Object Properties dialog (see [“Formatting Text in Fields and Text Boxes” on page 160](#)).

---

## Deleting a Calculated Field

You can permanently delete calculated fields from your database and from the Data Entry form. If you only want to remove the field from the form, see [“Deleting a Field From a Form” on page 158](#).

1. Click the **Edit Data Entry Form** button in the Data Entry window to open the Edit Data Entry Form window.
2. Open the **Format** menu and choose **Field Properties** to open the Field Properties dialog.
3. Choose the field that you want to delete from the **Field Name** list.
4. Click the **Delete** button to permanently remove the field from your file and forms.
5. Click **OK** to close the Field Properties dialog and return to the Edit Data Entry Form window.



# DATA ENTRY

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Importing Data From Other Programs	63
Entering Data in the Data Entry Window	69
Entering Data in the Data Table	77
Duplicating Data	83
Finding and Replacing Data	87
Sorting and Filtering Data	97
Managing Records	107



# Importing Data From Other Programs

---

## Overview

The database administrator can import data from another file into DataBase. When you import a file, the records are copied from the selected file and added to the end of the current database. The original file isn't affected by this process.

Only the administrator of the database can import data. If you're the administrator of the database and logged in as a Regular user, you need to switch to Administrator login before importing data (see [“Switching to a Different Login” on page 33](#)).



**NOTE:** DataBase can't import calculated fields from another database program.

---

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## Supported File Formats

DataBase can import data from the following file types:

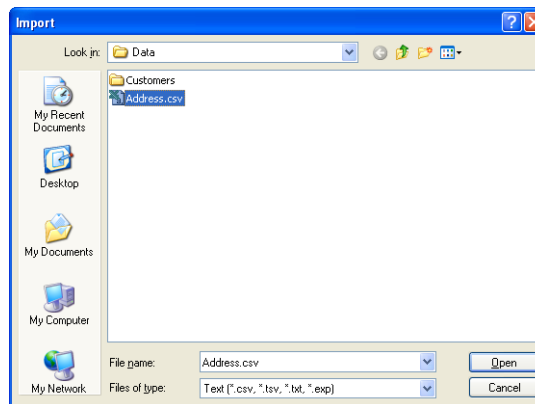
- MyDataBase™
- MyContactManager®
- MyLabel Designer®
- MyMailList™
- Access® 2.0, 7.0, 8.0
- ACT!™ 2.x, 3.x, 4.0
- Approach® 2.x, 3.x
- dBASE® 3.x, 4.x, 5.x
- Excel® 3.x, 4.x, 5.0, 7.0, 8.0
- Lotus® 1-2-3
- Outlook®
- Paradox® 3.x, 4.x, 5.x, 7.x
- ASCII Text Files, such as:
  - Comma Separated Variable (\*.csv)
  - Tab Separated Variable (\*.tsv)
  - MySoftware Export (\*.exp)
  - Fixed Field Length (\*.txt)

If the file that you want to import isn't supported, you might be able to use the original program to save the data in a format that DataBase does support, such as ASCII text in \*.csv format. Most database programs can save their data in other formats, usually by using the **Save As** or **Export** option. To learn how to save your file in a different format, see the documentation for your original program.

---

## Choosing the File to Import

1. Exit the program that created the file that you want to import.
2. Open the DataBase file that you want to import the database into.
3. Open the **File** menu and choose **Import** to open the Import dialog.



4. Choose the type of program that created the file you want to import from the **Files of Type** box.

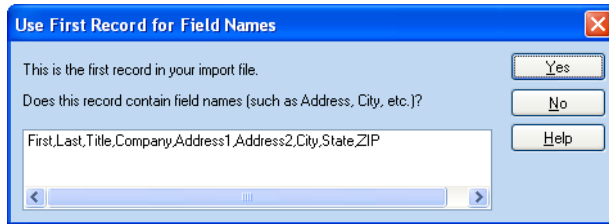
For information about importing an Outlook file, see [“Importing an Outlook File” on page 66](#).



5. Locate the drive and folder where the file is saved.
6. Select the file you want to import.
7. Click **OK**.

## Importing a Text File

When you import a text file, DataBase opens the Use First Record for Field Names dialog.

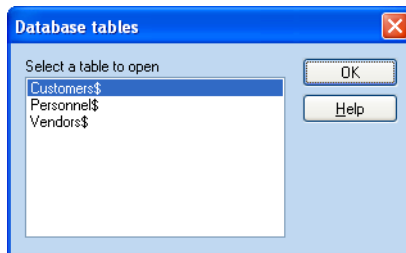


- If the first line of the file contains field names (such as `First_Name, Last_Name, . . .`), click **Yes**. This line isn't imported as data.
- If the first line contains data (such as `Bob, Smith, . . .`), click **No**. This line is imported as one of your records.

After you click **Yes** or **No**, DataBase opens the Assign Import Fields dialog (see [“Assigning Fields to Import”](#) on page 68).

## Importing an Access or Excel File with Tables

When you choose to import a Microsoft Access or Excel database that contains more than one table, the Database Tables dialog opens.



1. Choose the table you want to import.
2. Click **OK**.

For more information about tables, see your Access or Excel documentation.

## Importing an Excel File

To import data from a file that was created with Excel version 5.0 or earlier, you must first use Excel to set up a database in the spreadsheet.

In some cases, it might be easiest to save the Excel file in \*.csv format and then import from the \*.csv format.

For information about setting up a database in a spreadsheet, see your Excel documentation.

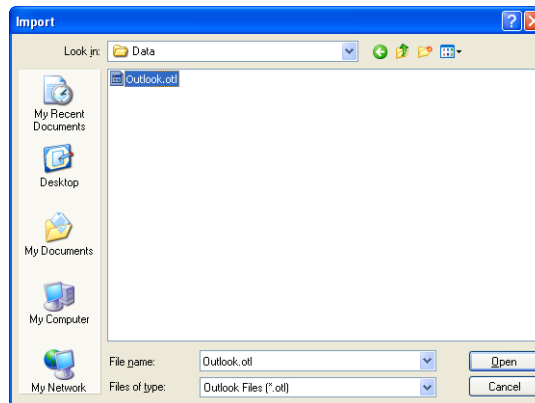
## Importing an Outlook File

DataBase can import a data file from your Outlook Contacts.



**NOTE:** If you're using Outlook Express, you need to export your Outlook Express data file as a text file and then import it to DataBase Professional (see [“Importing Data From Other Programs”](#) on page 63).

1. Open the **File** menu and choose **Import** to display the Import dialog.



2. Choose **Outlook** from the **Files of type** drop-down list.

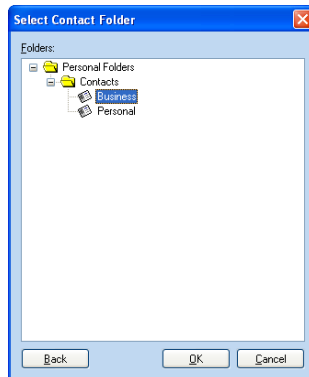
3. Choose the Outlook.otl file in the **Data** folder and then click **Open**.



**TIP:** The Outlook.otl file is located in the **Data** folder of the **DataBasePro** folder. The standard installation path is: C:\Program Files\MySoftware\DataBasePro\Data

You might be asked to choose to import from either your **Contacts** or your **Address Book Entries**. Select the appropriate option and then click **OK**.

If you have more than one Contacts file in Outlook, the Select Contact Folder dialog opens.



4. Choose the data file from the **Folders** list.
5. Click **OK** to begin importing the data file.

The Assign Import Fields dialog appears (see [“Assigning Fields to Import”](#) on page 68).

---

## Assigning Fields to Import

After you choose an import file, DataBase opens the Assign Import Fields dialog. Use this dialog to match the fields in the import file to the fields in the current DataBase file.

If possible, some of the fields in the import file are automatically matched to fields in the DataBase file.

1. Confirm any automatic assignments that are listed in the large box at the top of the dialog.
  - To reassign a pair of fields, click the pair and then click **Reassign**.
  - To start assigning the fields from scratch, click **Reassign All**. The field names appear in the boxes at the bottom of the dialog, so that you can match them again.
2. Match any remaining fields in the import file by clicking a field in the **Fields in Import File** list, and then clicking a field in the **Fields in Current File** list.
3. As the fields are matched, they appear in the list at the top.
4. After you finish matching the fields, click **OK** to import your data.

*Be sure to assign fields of the same data type. For example, numeric fields can only accept numeric data.*



---

**NOTE:** The data in any unassigned fields won't be imported into DataBase. DataBase adds the imported records to the end of your file. If you have already sorted your database, you need to sort again to put the records in order.

---

# Entering Data in the Data Entry Window

---

## Overview

Before entering data, the database administrator must place the fields you want to use on your Data Entry form in the Edit Data Entry Form window. For information about adding and removing fields, see [“Setting Up a Database” on page 41](#).

You can enter the data for the fields in either the Data Entry or Data Table windows. For information about the Data Table, see [“Entering Data in the Data Table” on page 77](#).

If you already have a database that you created using another program, the administrator can import that data into DataBase (see [“Importing Data From Other Programs” on page 63](#)).

To manage your database, you can find, sort, and filter the data. You can even remove duplicate records from your database (see [“Sorting and Filtering Data” on page 97](#) and [“Removing Duplicate Records” on page 109](#)).

---

## Viewing the Data Entry Window

The Data Entry window displays one record at a time. Each record is displayed like a single page or index card, and the whole database is organized like a stack of these cards.


Use the Data Entry window to enter data and view your records individually.

Modify your Data Entry Form using the Edit Data Entry Form window. To open the Edit Data Entry Form window, click the **Edit Data Entry Form** button located above the Data Entry form.

For information about modifying your Data Entry Form see [“Customizing the Data Entry Form” on page 47](#).

### Printing the Data Entry Form

A list of the records appears on the left side of the Data Entry window.



You can print your forms using the template design you choose or the design you create in the Edit Data Entry Form window. Open the **File** menu and choose **Print > Data Entry Form**. For more information, see [“Printing Output Forms” on page 193](#).

You can also print the forms with the design you create in the Output Forms window. For information about using the Output Forms window, see [“Customizing a Form Design” on page 123](#).

---

## Entering Data in the Fields

1. View the Data Entry window by clicking the **Data Entry** tab.
2. Click the field where you want to enter or edit data.  
The name of the selected field appears above the record. If you're using a form that has the field names inside of the edit boxes, the field name disappears when you click on a field or after you enter data into it.
3. Type your data.
4. Press TAB or ENTER to move the cursor to the next field.
5. Press PAGE DOWN to move to the next record.

To change the order that you move through the fields as you press TAB or ENTER, see [“Setting the Tab Order” on page 52](#).

As you enter records in the database, they appear in the Record Index on the left. The field appearing in the Index is the same as the current sort field for the file (see [“Sorting Your Data” on page 98](#)).



**NOTE:** You can also enter and edit your data using the Data Table. For information about using the Data Table, see [“Entering Data in the Data Table” on page 77](#).

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## Entering Data in a Rotated Field

To edit or enter data in a rotated field in the Data Entry window, click the field to open the Edit Field dialog.

Type the data in the dialog and click **OK** to accept your changes.

---

## Entering and Editing Data in the History Field

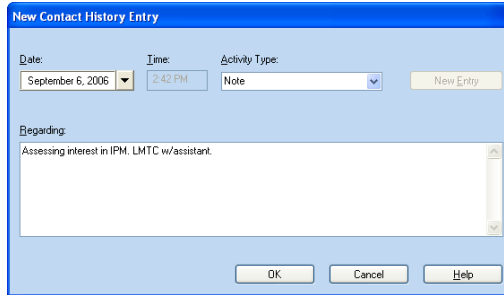
Use the History field in the Data Entry window to record calls, meetings, to-do items, and other notes about each record in your database.

Date	Activity	Regarding
09/06/2006 02:42 PM	Note	Assessing interest in IPM. LMTC w/assistant.

For information about creating a history field, see [“Creating a New Field” on page 54](#).

## Making a New Entry in the History Field

1. Double-click a blank line in the **History** field to open the New Contact History Entry dialog.



**TIP:** You can also right-click in the **History** field and choose **New** from the shortcut menu to open the New Contact History dialog.

2. If you want to change the date of the entry, click the **Date** box and choose the date that you want from the calendar.  
You can't change the time.
  3. Choose a category for the entry from the **Activity Type** drop-down list.  
If the available options don't meet your needs, you can create your own category (see [“Customizing the Activity Type List” on page 74](#)).
  4. Enter your text in the **Regarding** box.
  5. Click **OK** to close the dialog and display the information in your form.
- You might want to create a Follow-Up Date field for entering a date to follow-up on your history field activity. You can use the Follow-Up Date information to generate reports, or to sort and filter your records.



## Editing an Existing Entry in the History Field

1. Double-click the entry that you want to edit to open the Edit Contact History Entry dialog.

2. Choose another date from the **Date** drop-down list or a category from the **Activity Type** drop-down list, if needed.

If the available options in the **Activity Type** drop-down list don't meet your needs, you can create your own category (see [“Customizing the Activity Type List” on page 74](#)).

3. Click in the **Regarding** box and edit the text as needed.
4. Continue editing new or existing entries:
  - To save the changes you made and create a new entry for the current record, click the **New Entry** button.
  - To edit other entries in the current record, click the **Next** or **Previous** buttons.
5. Click **OK** to save your changes and return to the Data Entry window.

## Deleting an Entry in the History Field

To delete one of the entries in the history field, right-click the entry and choose **Delete** from the shortcut menu.



**CAUTION:** Opening the **Edit** menu and choosing **Delete** removes *all* of the data from *all* of the fields in the record.

## Customizing the Activity Type List

Some of the DataBase templates include a list of categories in the **Activity Type** list, so that you can easily categorize your notes when you enter history information. If the choices don't meet your needs, you can enter a new category.

1. View the **Activity Type** list by doing one of the following:
  - Double-click a blank line in the **History** field, or right-click and choose **New** from the shortcut menu, to open the New Contact History Entry dialog.
  - Double-click the History entry that you want to edit, or right-click and choose **Edit** from the shortcut menu, to open the Edit Contact History Entry dialog.
2. Click in the **Activity Type** box and enter your new category. The text must be less than 15 characters long.
3. Click **OK** to save the new list item.

**CAUTION:** *Be very careful when you type the category name, because it can't be removed or edited later.*

---

## Placing an Image in a Field

To place images in your records that can change from record to record, use an Image field. If you don't have an Image field available, the database administrator can create one (see [“Creating a New Field” on page 54](#)).

When you click in an empty Image field in the Data Entry window, the Pick Picture dialog opens allowing you to choose an image file (see [“To Add Clipart to Your Form” on page 172](#)).

- To change an existing image in a record, double-click the image field or right-click the image field and choose **Change Image** to open the Pick Picture dialog.
- To remove an image from a record, right-click the image field and choose **Delete Image**, and then click **Yes** in the confirmation message.
- To save the image in a new image file, right click the image field and choose **Export Image** to open the Save As dialog.

---

## Creating a New Record

There are several ways to create a new record. Pick the one that works best for you.

- Click the **New Record** button above the Index on the left side of the Data Entry window.
- Open the **Data** menu and choose **New Record**.
- Click on the blank entry at the bottom of the Index. You might need to scroll down in the Index to view this entry.
- Press PAGE DOWN if you're viewing the last record in your database.

---

## Moving Between Records



Navigation

There are several ways to display the different records in your database. Pick the one that works best for you.

- Press PAGE DOWN or PAGE UP to move to the next or previous record.
- Click on the navigation buttons in the toolbar to move to the first record, previous record, next record, or last record.
- Click on an Index entry to view the record for that entry.
- Open the **Data** menu and choose **Go To** to open the Go To dialog, and then enter a specific record number.

The record numbers appear above the record in the Data Entry window, and on the left side of the Data Table.



# Entering Data in the Data Table

---

## Overview

You can enter the data for the fields in either the Data Entry or Data Table windows. For information about the Data Entry window, see [“Entering Data in the Data Entry Window” on page 69](#).

If you already have a database that you created using another program, the administrator can import that data into DataBase (see [“Importing Data From Other Programs” on page 63](#)).

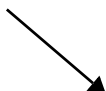
To manage your database, you can find, sort, and filter the data. You can even remove duplicate records from your database (see [“Sorting and Filtering Data” on page 97](#) and [“Removing Duplicate Records” on page 109](#)).

## Viewing the Data Table

The Data Table window displays the records in a table. Each field has a column in the table, and each record has a row. Enter your data in the cells where the rows and columns intersect.

In the Data Table window, you can select groups of records to print, or even print your data in a table.

To select a record in the Data Table, click the record number on the left.



	Data Entry		Data Table		Output Forms		Standard Reports		Custom Reports		Email	
		Last Name / 1	First Name / 2		Title	Company / 3		Address 1	City		State	Zip Co
A	1	Andrews	Sarah	Sales Manager	Treasured Posses	313 Madison Lane	Hillsborough	CA				94010
B	2	Andrews	W. M.		W. M. Andrews Corp	210 E. Texas Street	Colma	CA				94014-7941
C	3	Bealy	Calle	Managing Editor	Bealy Home Comp	416 S. Region Street	Palo Alto	CA				94303-289C
D	4	Bernie	Marvin	Foreman	MB Well Digging	1026 Old Lane	Los Altos	CA				94022-3901
E	5	Berthoff	Helen	Legal Analyst	Kiewit Accounting	722 New York Ave	Mountain View	CA				94043-2905
F	6	Bolz	Louise	Machine Operator	LEB Engineering	123 Cleveland Way	Burlingame	CA				94010-0894
G	7	Boulresse	Mary	Administrative Asst	Century Personnel	291 Louisiana Ave	Los Gatos	CA				95030-862C
H	8	Clementine	Nathan	Proprietor	Clementine Natural	639 Kentucky Circle	Palo Alto	CA				94306-781E
I	9	Collins	Isaac	Agent	Collins Insurance Gr	769 Greenbrier Driv	San Jose	CA				95136-180Z
J	10	Coolman	Susannah	Logistics Coordinator	LHNI Services	1012 Anderson Co	Los Altos	CA				94022-4834
K	11	Griffs	Frances	Executive Secretary	Bookkeepers Assoc	623 Montebello Way	Campbell	CA				95008-6934
L	12	Curry	Margaret	Human Resources	JcSacc Engineering	387 Augusta Way	Campbell	CA				95008-875E
M	13	Dale	Bernie	Owner	Dale's Landscape M	910 City Way	Alviso	CA				95002-792S
N	14	Driss	Walter	Vice President, Ops	Courier Customizing	1130 Archer Street	Cupertino	CA				95014-396S
O	15	Douglas	Alexander	President	The Achiever Group	515 Taurus Court	San Jose	CA				95118-5891
P	16	Durn	Georgia	Shift Supervisor	Lizzi's Foods	222 Oklahoma Way	Redwood City	CA				94063-490E
Q	17	Edgar	Frank	Owner	Frank's Truck Shop	802 Boston Avenue	Mountain View	CA				94043-1911
R	18	Edwin	George	Personnel Director	Frane Products Cor	316 Texas Drive	Millbrae	CA				94030-187E
S	19	Engel	Louise	Estimator	Rosedale Construct	1211 Fredricksburg	Pacificia	CA				94044-085S
T	20	Floyd	William	Attorney	Andrews, Floyd, an	311 Ringo Drive	Monte Sereno	CA				95030-8814
U	21	Gallup	Jo Ann	Archivist	Nickel Research	246 Stratford Aven	Redwood City	CA				94065-087Z
V												
W												
X												
Y												
Z												
			</									

You can format the Data Table by adjusting the height and width of the rows and columns, rearranging the columns, choosing the fields that are displayed, and changing the font of your column headings and data.



**NOTE:** History and Notebox fields don't appear in the Data Table.

## Entering Data in the Cells

1. The Data Table window allows you to view and edit your data in a table.
2. Click the **Data Table** tab to open the Data Table window.
3. Select the cell you want to edit by clicking in the cell.
  - To replace the information in the selected cell, begin typing.
  - To edit the data in the cell, click in the cell again to insert the cursor, and then make your changes.
4. Press TAB or the Arrow keys on your keyboard to move between cells.

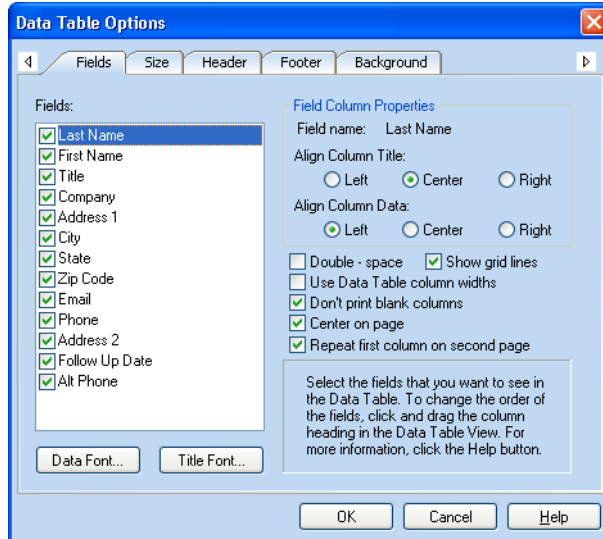
---

## Choosing the Data Table Fields

Choose the fields that appear and print in the Data Table by setting the Data Table options.

1. Click the **Data Table** tab to open the Data Table window.
2. Open the **View** menu and choose **Change Data Table Options** to open the Data Table Options dialog.

*Removing a field from the Data Table doesn't remove the data from your database.*



3. Click the **Fields** tab at the top of the dialog.
4. To add or remove a field from the Data Table, mark or clear the check box next to the field's name.
5. Click **OK** to apply your changes.

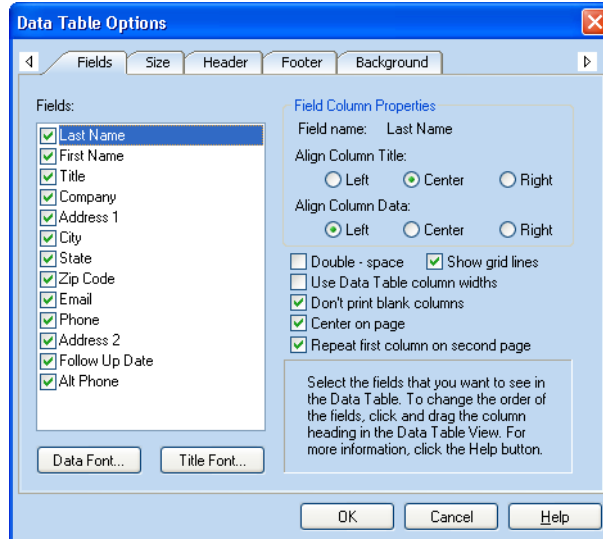
Use the other tabs in this dialog to format the Data Table for printing (see [“Preparing the Data Table for Printing” on page 206](#)).

---

## Changing the Data Table Font

Use the Data Table Options dialog to set the fonts and text alignment for your data and column headings.

1. Click the **Data Table** tab to open the Data Table window.
2. Open the **View** menu and choose **Change Data Table Options** to open the Data Table Options dialog.



3. Click the **Fields** tab at the top of the dialog.
4. Open the Font dialog for data fields or column headings:
  - To set the font for your data, click the **Data Font** button.
  - To set the font for the column headings, click the **Title Font** button.
5. Choose the font and font options in the Font dialog.
6. Click **OK** to return to the Data Table Options dialog.
7. Set the alignment of text within a column by clicking the field name and then choosing the alignment from **Field Column Properties**.
8. Click **OK** to apply all of your changes.

For information about setting other Data Table options, see [“Preparing the Data Table for Printing” on page 206](#).



---

## Changing the Format of the Data Table

You can change the height of all of the rows, change the width of each column, or change the position of the columns in the Data Table.

### Resizing the Rows

Record numbers appear along the left side of the Data Table.

1. Position the cursor on the line below a record number.

The cursor changes to the resize cursor shown below.

To resize the rows, click and drag a line between rows.

	Last Name / 1	First Name /
A		
B	1 Andrews	Sarah
C	2 Andrews	W. M.
D	3 Beaty	
E		

2. Click and drag the cell up or down, and then release the mouse button to set the new height.

All of the rows are resized to the new height.

### Resizing a Column

The field names appear along the top of the Data Table.

1. Position the cursor on the line between the field names.

The cursor changes to the resize cursor shown below.

To resize the columns, click and drag a line between columns.

	Last Name / 1	First Name / 2	Title
A			
B	1 Andrews	Sarah	Sales Manager
C	2 Andrews	W. M.	
D	3 Beaty	Callie	
E			

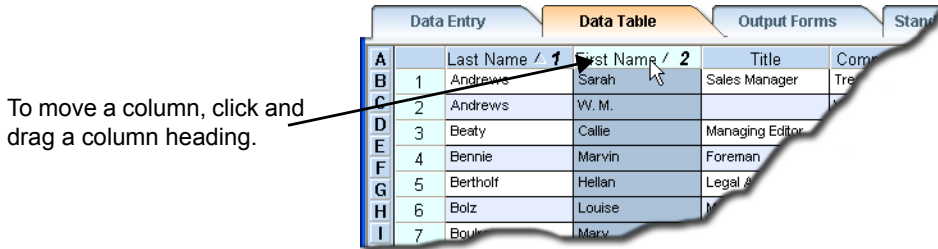
2. Click and drag the column to the right or left, and then release the mouse button to set the new column width.

Only adjoining columns are affected.

## Moving the Columns

To change the order of the fields in the Data Table, rearrange the columns.

1. Point the cursor at the field name at the top of a column.



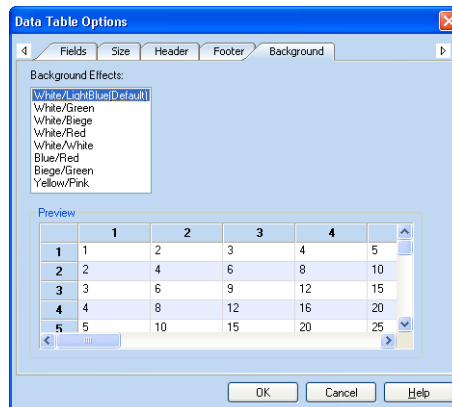
2. Click and hold the mouse button down, and then drag the cursor to where you want to move the column.
3. Release the mouse button.

To add or remove fields from the Data Table window, use the Data Table Options dialog (see [“Choosing the Data Table Fields” on page 79](#)).

## Changing the Color Options of the Rows

You can choose alternating colors for the rows in the Data Table.

1. Click the **Data Table** tab to open the Data Table window.
2. Open the **Format** menu and choose **Data Table Options** to open the Data Table Options dialog.



3. Click the **Background** tab at the top of the dialog.
4. Choose the color setting you want from the **Background Effects** list.  
A preview of the color setting appears in the lower area of the dialog.
5. Click **OK** to apply all of your changes.

# Duplicating Data

---

## Overview

You can copy data from one record into another record or into a group of consecutive records. This avoids repetitive data entry when you have a group of similar records.

To manage your database, you can find, sort, and filter the data. You can even remove duplicate records from your database (see [“Sorting and Filtering Data” on page 97](#) and [“Removing Duplicate Records” on page 109](#)).

---

## Copying Data From the Previous Record

DataBase offers a quick way to copy data from a field in the previous record to the same field in the current record. For example, if you know that record 50 should list the same company name as record 49, you can copy the company name into record 50.

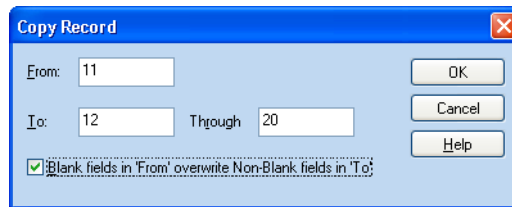
1. Click the **Data Entry** tab to open the Data Entry window.
2. Display the record that you want the data copied to and click in the field where you want the data.
3. Open the **Edit** menu and choose **Ditto Field** (or press CTRL + D).

---

## Copying Data to Consecutive Records

DataBase allows you to copy data from one record into consecutive records. For example, if you have 20 addresses from the same area, you can type the city, state, and ZIP Code into one record and copy that data into the next 19 records. Then, you can go back and enter the non-repetitive information into each record.

1. Open the **Edit** menu and choose **Duplicate Record** to open the Copy Record dialog.



2. Enter the number of the record that contains the data you want to copy in the **From** box.
3. Decide where to copy the data:
  - To copy the data into a single record, enter the number of the destination record in the **To** box, and then enter the same number in the **Through** box.
  - To copy the data to consecutive records, enter the first and last record number in the **To** and **Through** boxes.



**NOTE:** If the number in the **Through** box is higher than the number of records in the database, new records are created.

4. Mark the **Blank Fields** check box if you want blank fields in the record you're copying to erase data in the destination records.
5. Click **OK** to copy the data.

---

## Duplicating Data in the Data Table Cells

You can duplicate the information in your records by cutting or copying the information in selected cells and then pasting it into other cells.

- To copy information in selected cells and place the information on the Windows Clipboard, select the cells and then open the **Edit** menu and choose **Copy Cells**.
- To remove information in selected cells and place the information on the Windows Clipboard, select the cells and then open the **Edit** menu and choose **Cut Cells**.
- To paste information into selected cells that you previously cut or copied, select the cells and then open the **Edit** menu and choose **Paste Cells**.

DataBase automatically pastes the data into the number of cells that you cut or copied, even if you don't select the same number of cells before pasting.

- To remove information in selected cells without placing the information on the Windows Clipboard, select the cells and then open the **Edit** menu and choose **Delete Cells**.

Deleting the information in selected cells removes the information, but doesn't delete the field from your file.

## Inserting Records in the Data Table

You can add a new record in the Data Table window by inserting a row at the top of the list, the bottom of the list, or anywhere in between.

To insert a record, select the row below where you want to insert the new record. Then, open the **Edit** menu and choose **Insert 1 Blank Record (Row)**. The new blank record is inserted above the selected record. To add a record to the end of the list, select the blank record at the bottom.

You can add several records at a time by first selecting the same number of consecutive existing records as the number of records that you want to add. The menu option changes to tell you how many new records will be inserted. For example, if you want to add five new records, select five consecutive records below where you want to insert the new records, and then open the **Edit** menu and choose **Insert 5 Blank Records (Rows)**.

For information about selecting multiple records in the Data Table, see [“Selecting a Group of Records” on page 108](#).

---

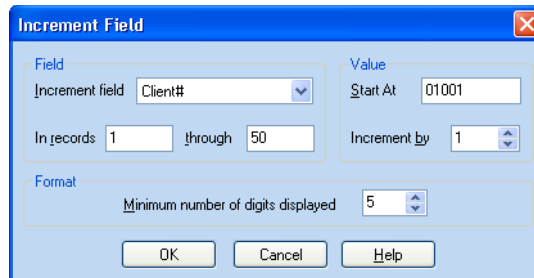
## Incrementing Fields

*Before incrementing a field in your database, you should make a backup (see “Backing Up Your Files” on page 285).*

DataBase can automatically increment the value of numbers in your fields. For example, if you have a serial number field, and the first serial number is 1000, DataBase can automatically number the existing records after it as 1001, 1002, 1003, and so on.

You can increment fields in the Data Entry window or the Data Table.

1. Open the **Data** menu and choose **Increment Field** to open the Increment Field dialog.



2. Click the **Increment Field** drop-down list and choose the field you want to increment.
3. Type the rest of the values into the dialog:
  - To enter the same value in the field for all of the records, increment by 0.
  - If you want the number to have leading zeros, set a minimum number of digits.
4. Click **OK** to increment the field.
5. If the Overwrite Data dialog appears:
  - Click **Yes** to replace the data that has already been entered in the field.
  - Click **No** to skip the replacement for each record.
  - Click **Yes to All** to replace the data in all of the fields.
  - Click **Cancel** to return to the Data Entry window without incrementing the data.



**NOTE:** If you change the numbering of an incremented field, you must choose the Increment Field option again to adjust the numbers in the rest of your database.

---

# Finding and Replacing Data

---

## Overview

DataBase provides powerful tools for helping you manipulate the data in your database. You can search and replace data, sort your data, filter your data, and automatically remove duplicate records.

The sort and filter information is saved separately with each user, allowing users to arrange the records in the way that works best for them.

---

## Finding a Specific Record

There are three options for finding specific records with DataBase:

- Use the Quick Find buttons in the Data Entry and Data Table windows to quickly scroll to the section of the alphabet that you want to see.
- Use the Find dialog to look for specific search criteria, such as a company name.
- Use the Go To dialog to move directly to a specific record number.

---

## Using Quick Find

The column of letters on the left side of the Data Entry and Data Table windows are the Quick Find buttons. The Quick Find buttons search the Index area of the Data Entry window, or the first column appearing in the Data Table. When you click a Quick Find button, the first record that begins with the letter you clicked is displayed or highlighted.

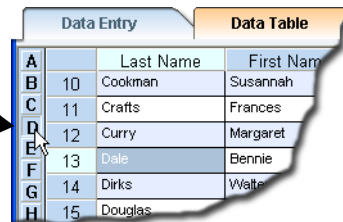
1. Make sure the field displayed in the Index, or the first column displayed in the Data Table is the field you want to search.
  - To move a Data Table column, click and drag it (see [“Moving the Columns” on page 82](#)).
  - To change the Index field, change the sort field (see [“Sorting Your Data” on page 98](#)).

2. Click on the letter that matches the data you want to find.

If the letter isn’t displayed, use the scroll buttons at the top or bottom of the Quick Find buttons until the letter appears.

The first record that begins with the letter you clicked is displayed or highlighted.

For example, if you want to find the first person in your database whose last name begins with D, make sure that the last name field appears as the first column of the Data Table and then click the **D** Quick Find button.



Data Entry		Data Table	
A		Last Name	First Name
B	10	Cookman	Susannah
C	11	Crafts	Frances
D	12	Curry	Margaret
E	13	Dale	Bennie
F	14	Dirks	Walter
G	15	Douglas	
H			

---

## Using the Find Dialog

The Find dialog allows you to easily find records based on the text they contain. To open the Find dialog, open the **Edit** menu and choose **Find Record**.

There are three methods for searching using the Find dialog:

- **Simple** searches for specific text in a *specific* field.
- **Standard** searches for specific text in *any* field.
- **Advanced** searches using multiple criteria.

DataBase looks for the first record that matches your criteria, and displays it in the Data Entry window, or highlights it in the Data Table.

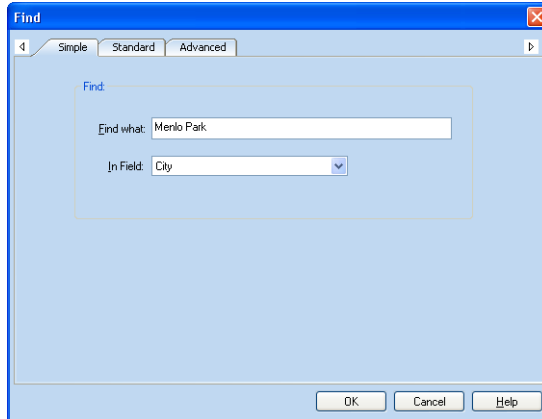
The different search methods are explained in the following sections.



## Using a Simple Search

A Simple search allows you to search for records containing specific text in a specific field.

1. Open the **Edit** menu and choose **Find Record** to open the Find dialog.



2. Click the **Simple** tab at the top of the Find dialog.
3. Click in the **Find What** box and type the text you want to find.  
This isn't a case-sensitive search, so it doesn't matter whether or not you use capital letters.
4. Click the **In Field** list, and choose the field that you want to search.  
If you aren't sure which field might contain the text, use a Standard search (see [“Using a Standard Search” on page 90](#)).
5. Click **OK**.

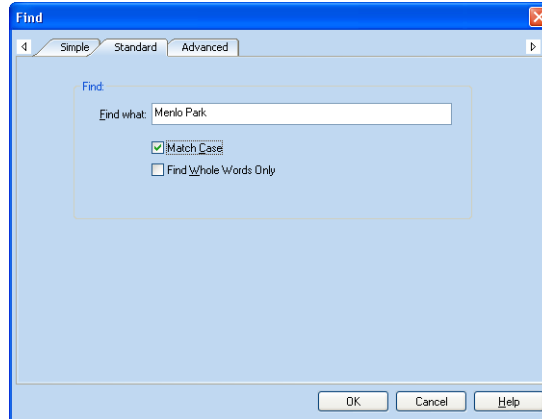
DataBase displays or highlights the first record that contains the specified text. If it isn't the record you're looking for, open the **Edit** menu and choose **Find Next**, or enter stricter criteria in the Find dialog.

*Calculated fields aren't listed in the Find dialog.*

## Using a Standard Search

A Standard search allows you to search for records with specific text contained in any field.

1. Open the **Edit** menu and choose **Find Record** to open the Find dialog.



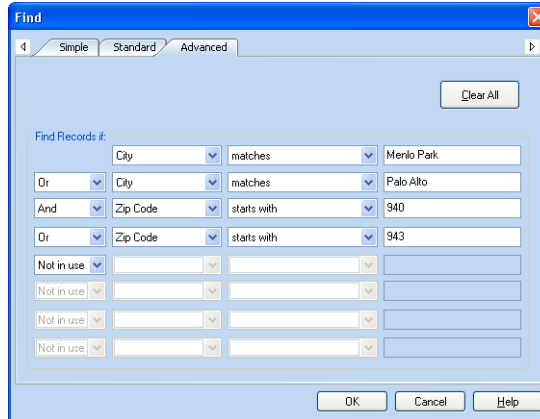
2. Click the **Standard** tab at the top of the Find dialog.
3. Click in the **Find What** box and type the text you want to find.
4. Choose the other options you want to use:
  - Mark **Match Case** to perform a case-sensitive search, so the upper and lower case letters in the text must be an exact match. For example, searching for “Smith” would find “Smith” but not “smith” or “SMITH.”
  - Mark **Find Whole Words Only** to search only for records where the text is separated from any other text. For example, searching for “John” would find “John Smith” but not “Ken Johnson.”
5. Click **OK**.

DataBase displays or highlights the first record that contains the specified text. If it isn't the record you're looking for, open the **Edit** menu and choose **Find Next**, or enter stricter criteria in the Find dialog.

## Using an Advanced Search

An Advanced search allows you to search for records using multiple criteria, such as text contained in a field.

1. Open the **Edit** menu and choose **Find Record** to open the Find dialog.



2. Click the **Advanced** tab at the top of the Find dialog.
3. Click in the top-left box and choose the field you want to search.
4. Click in the top-middle box and choose a criterion for the search.
5. If necessary, click in the top-right box to enter the text or number you want to find.

This isn't a case-sensitive search, so it doesn't matter whether or not you use capital letters.

6. Use the other boxes in the dialog to add more criteria to the search.

DataBase applies search criteria to each record individually. If you use multiple criteria, consider your conditional statements carefully:

- Combining criteria with **And** means that *all* of the search criteria must be found in the same record.
- Combining criteria with **Or** means that at least *one* of the search criteria is in the record.

For example, if you want to find the record for a customer whose last name is either Smith or Johnson, search for records where the last name field is Smith **Or** Johnson. If you used **And**, DataBase would try to find a record that contained both "Smith" and "Johnson" in the last name field.

7. Click **OK**.

DataBase displays or highlights the first record that contains the specified text. If it isn't the record you're looking for, open the **Edit** menu and choose **Find Next**, or enter stricter criteria in the Find dialog.

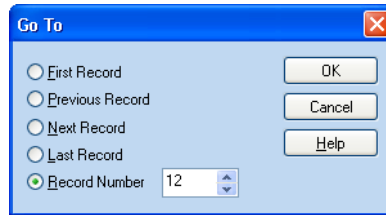
---

## Finding a Record by Number

Find a specific record by entering its number in the Go To dialog.

The record numbers appear above the form in the Data Entry window, and on the left side of the Data Table.

1. Open the **Data** menu and choose **Go To** to open the Go To dialog.



2. Enter the number of the record you want to display.
3. Click **OK**.

DataBase displays the record in the Data Entry window or highlights it in the Data Table.

---

## Replacing Data

The Replace dialog allows you to search for data in your database and make changes to that data automatically.

There are three methods for searching and replacing:

- **Simple** searches for and replaces specific text in a *specific* field.
- **Standard** searches for and replaces specific text in *any* field.
- **Advanced** searches and replaces using multiple criteria.

*Before replacing data in your database, you should make a backup (see “Backing Up Your Files” on page 285).*

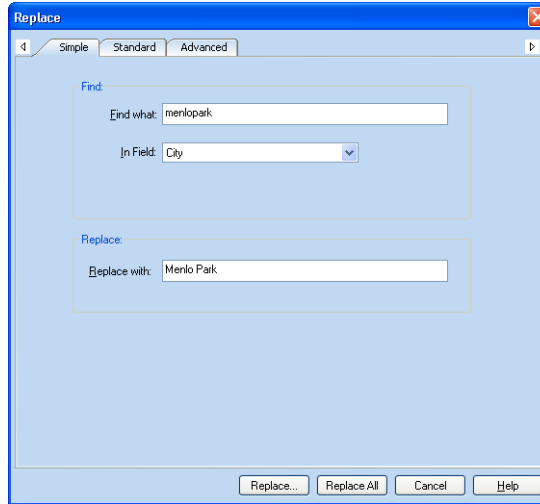
To use the Replace dialog, open the **Edit** menu and choose **Replace**. Use the tabs at the top of the dialog to choose the search and replace method. Then, enter your search and replace criteria and click **OK**.

The different search and replace methods are explained in detail in the following sections.

## Using a Simple Search and Replace

A Simple search and replace allows you to search for records containing specific text in a specific field, and then replace that text.

1. Open the **Edit** menu and choose **Replace** to open the Replace dialog.



2. Click the **Simple** tab at the top of the Replace dialog.
3. Click in the **Find What** box and type the text you want to find.  
This isn't a case-sensitive search, so it doesn't matter whether or not you use capital letters.
4. Click the **In Field** list, and choose the field that you want to search.  
If you aren't sure which field might contain the text, use a Standard search and replace (see [“Using a Standard Search and Replace” on page 94](#)).  
Calculated fields aren't listed in the Replace dialog.
5. Type the new text for the field in the **Replace with** box.
6. Choose how the Replace feature should work:
  - If you want to confirm each change, click the **Replace** button.
  - If you want DataBase to make all of the changes automatically, click the **Replace All** button.

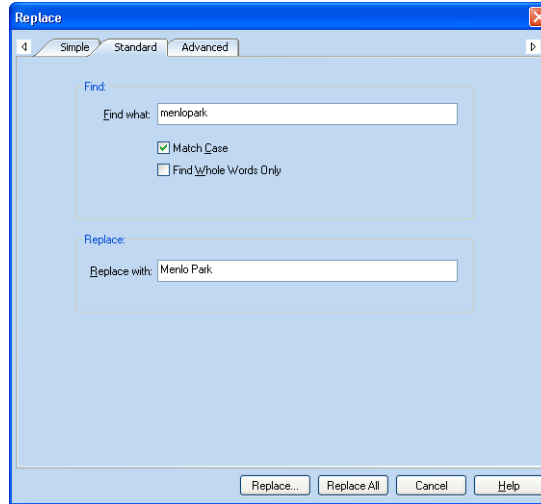
**CAUTION:** *All of the data in the field is replaced with the text in the **Replace With** box. If you only want to replace some of the text in the field, use a Standard search and replace (see [“Using a Standard Search and Replace” on page 94](#)).*

If you confirm each change, the Confirm Replace dialog opens every time DataBase finds a match. In that dialog, you have the option of making the change, skipping to the next match, or starting an automatic replace (see [“Confirming Replacement Changes” on page 96](#)).

## Using a Standard Search and Replace

A Standard search and replace allows you to search for records with specific text contained in any field, and then replace the text.

1. Open the **Edit** menu and choose **Replace** to open the Replace dialog.



2. Click the **Standard** tab at the top of the Replace dialog.
3. Click in the **Find What** box and type the text you want to find.
4. Choose the other options you want to use:
5. Mark **Match Case** to perform a case-sensitive search, so the upper and lower case letters in the text must be an exact match. For example, searching for “Smith” would find “Smith” but not “smith” or “SMITH.”
6. Mark **Find Whole Words Only** to search only for records where the text is separated from any other text. For example, searching for “John” would find “John Smith” but not “Ken Johnson.”
7. Type the new text in the **Replace with** box.  
Only the text specified in the **Find What** box is replaced.
8. Choose how you want the Replace feature to work:
  - If you want to confirm each change, click the **Replace** button.
  - If you want DataBase to make all of the changes automatically, click the **Replace All** button.

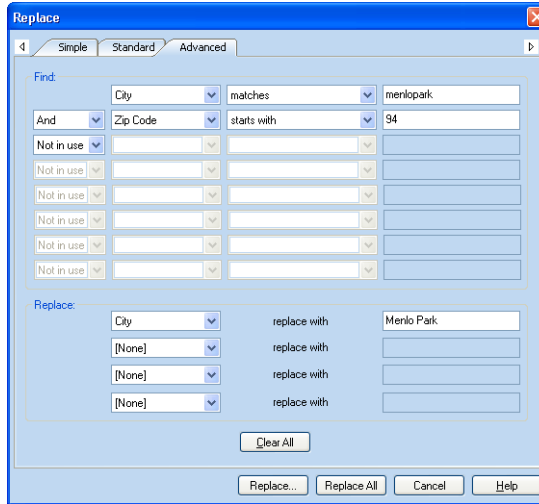
If you confirm each change, the Confirm Replace dialog opens every time DataBase finds a match. In that dialog, you have the option of making the change, skipping to the next match, or starting an automatic replace (see [“Confirming Replacement Changes” on page 96](#)).

## Using an Advanced Search and Replace

An Advanced search and replace allows you to search for records using multiple criteria, and then replace text in up to four fields at a time.

1. Open the **Edit** menu and choose **Replace** to open the Replace dialog.

**CAUTION:** *All of the data in the field is replaced with the text in the **Replace With** box. If you only want to replace some of the text in the field, use a Standard search and replace (see “Using a Standard Search and Replace” on page 94).*



2. Click the **Advanced** tab at the top of the Replace dialog.
3. Click in the top-left box and choose the field you want to search.
4. Click in the top-middle box and choose a criterion for the search.
5. If necessary, click in the top-right box to enter the text or number you want to find.
6. Use the other boxes in the dialog to add more criteria to the search.  
DataBase applies the search criteria to each record individually. If you use multiple criteria, consider your conditional statements carefully:
  - Combining criteria with **And** means that *all* of the search criteria must be found in the same record.
  - Combining criteria with **Or** means that at least *one* of the search criteria is in the record.

For example, if you want to find the record for a customer whose last name is either Smith or Johnson, search for records where the last name field is Smith **Or** Johnson. If you used **And**, DataBase would try to find a record that contained both “Smith” and “Johnson” in the last name field.

7. Use the **Replace** portion of the dialog to choose up to four fields you want to change and to enter the new data for the chosen fields.

**NOTE:** *This isn't a case-sensitive search, so it doesn't matter whether or not you use capital letters.*

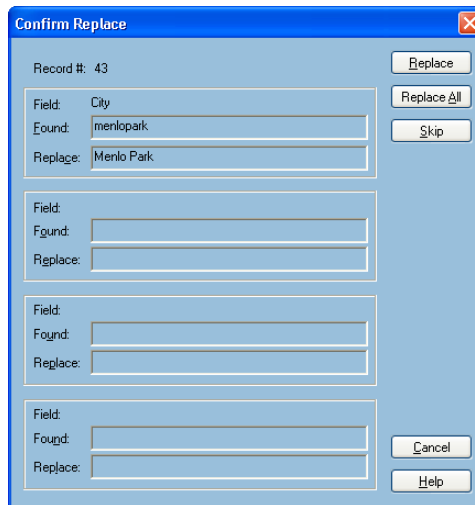
8. Choose how you want the Replace feature to work:

- If you want to confirm each change, click the **Replace** button (see “[Confirming Replacement Changes](#)” on page 96).
- If you want DataBase to make all of the changes automatically, click the **Replace All** button.

## Confirming Replacement Changes

Unless you clicked the **Replace All** button in the Replace dialog, DataBase asks you to confirm the changes whenever it finds a record that meets your search criteria.

*The Confirm Replace dialog lists all of the changes that will be made to the record.*



Choose how you want the Replace feature to work:

- To confirm this change, click the **Replace** button.
- To have DataBase change all of the remaining records automatically, click the **Replace All** button.
- To continue checking the file without changing the displayed record, click **Skip**.



# Sorting and Filtering Data

---

## Overview

DataBase provides powerful tools for helping you manipulate the data in your database. You can search and replace data, sort your data, filter your data, and automatically remove duplicate records.

The sort and filter information is saved separately with each user, allowing users to arrange the records in the way that works best for them.

---

## Sorting Your Data

You can sort your database to change the order that the records are printed and displayed in the Data Table and Data Entry windows. If you want to change the field that appears in the Index area on the left side of the Data Entry window, sort your records by the field you want to appear.

The easiest way to sort your records is by sorting the columns in the Data Table (see “[Sorting Records in the Data Table](#)” below).

You can perform multi-level sorts using the Sort dialog (see “[Using the Sort Dialog](#)” on page 99).

---

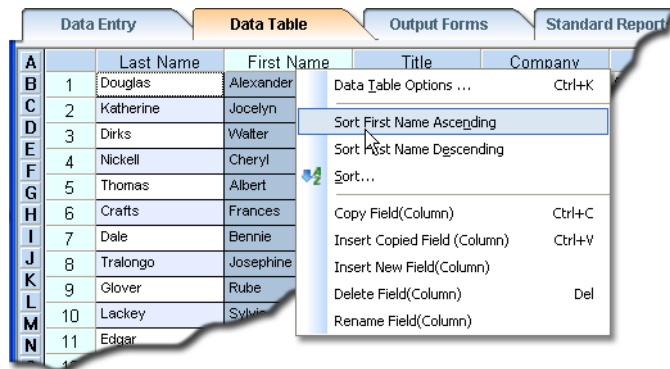


**NOTE:** New records aren’t sorted automatically. Sort your database again after adding records.

---

### Sorting Records in the Data Table

1. Click the **Data Table** tab to open the Data Table window.
2. Right-click on the heading of the column you want to sort by to open a shortcut menu.



3. Choose your sort option from the shortcut menu.
  - To sort your records in alphabetical order, choose **Sort Ascending**.
  - To sort your records in reverse alphabetical order, choose **Sort Descending**.

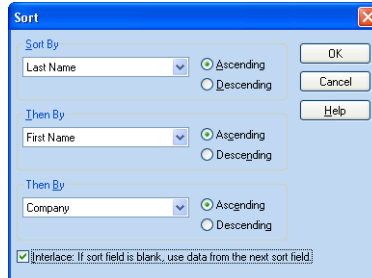
After sorting, the number one appears in the column heading next to a triangle indicating the method of sorting the data in that column.

## Using the Sort Dialog

Use the Sort dialog to change the order that your records appear and print. You can also use the Sort dialog to change the field that appears in the Index area of the Data Entry window. In addition, the Sort dialog is used to create a Custom Sort for a Standard Report (see [“Sorting Records for the Standard Report” on page 248](#)).

1. Open the **Data** menu and choose **Sort**.

*New records aren't sorted automatically. Sort your database again after adding records.*



You can sort the database in ascending (A–Z) or descending (Z–A) order using any field. DataBase can also sort up to three levels deep, so if two records have the same data in one field, they can be sorted by a different field.

2. Choose the sort field(s) from the list boxes.

If two or more records have the same data in the first sort field, those records are sorted according to the second field. If records have the same data in both the first and the second sort field, they're sorted using data from the third field.

3. Choose the order of the sort (ascending or descending) for each field.

If you want a record to be sorted by the next sort field when the first sort field is blank, mark the **Interlace** check box.

4. Click **OK** to sort the current file.

For example, with the sort fields set as shown in the Sort dialog above, these records would be placed in the following order:

	Last Name	First Name	Company
1.	Andrews	Sarah	Treasured Possessions
2.	Andrews	W. M.	W. M. Andrews Company
3.	Boulrese	Mary	Century Personnel
4.	(blank)	(blank)	Courier Customizing
5.	Curry	Margaret	JoSaac Engineering

After sorting, numbers indicating the sort order appear in the Data Table column headings next to a triangle indicating the method of sorting the data in that column.

---

## Filtering Records

Filtering allows you to view and print only those records that meet the criteria you set.

There are three methods of filtering:

- **Simple** includes records that contain *specific* text in a specific field.
- **Standard** includes records that contain specific text in *any* field.
- **Advanced** includes records based on *multiple* filter criteria. You can save the criteria of an advanced filter to use it again.



Filter Records

To set your filter criteria, open the **Data** menu and choose **Filter** or click the **Filter Records** button in the toolbar to open the Filter dialog. Use the tabs at the top of the Filter dialog to choose the filtering method. Then, enter your filter criteria and click **OK**. After filtering, DataBase hides the records that don't meet your criteria.

To turn off the filter and see all of your records, open the **Data** menu and choose **Display All Records**.



---

**NOTE:** If you want to select or print specific records from your list, select them in the Data Table window (see [“Selecting a Group of Records” on page 108](#)).

---

The different filtering methods are explained in the following sections.

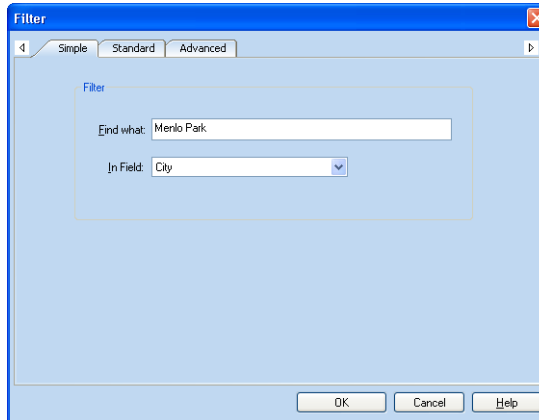
## Using a Simple Filter

The Simple filter allows you to display records that contain specific text in a specific field. The field doesn't need to be on the current form.



Filter Records

1. Open the **Data** menu and choose **Filter** or click the **Filter Records** button in the toolbar to open the Filter dialog.



2. Click the **Simple** tab at the top of the Filter dialog.
3. Click in the **Find what** box and type the text you want to include.  
This isn't a case-sensitive search, so it doesn't matter whether or not you use capital letters.
4. Choose the field that should contain the text from the **In Field** list.  
If you're not sure which field may contain the text, use a Standard filter (see [“Using a Standard Filter” on page 102](#)).
5. Click **OK**.

The filter searches your file, and then displays only those records that meet the filter criteria. The rest of your list is hidden from view until you turn the filter off.

To turn the filter off and see all of your data, open the **Data** menu and choose **Display All Records**.

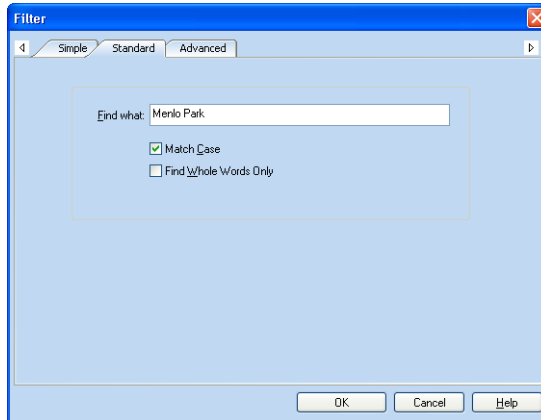
## Using a Standard Filter

The Standard filter allows you to search for records with specific text in any field. The field doesn't need to be on the current form.



Filter Records

1. Open the **Data** menu and choose **Filter** or click the **Filter Records** button in the toolbar to open the Filter dialog.



2. Click the **Standard** tab at the top of the Filter dialog.
3. Click in the **Find what** box and type the text you want.  
Records that include this text are displayed.
4. Choose the other options you want to use:
  - Mark **Match Case** to make the filter case-sensitive, so that the upper and lower case letters in the text must be an exact match. For example, typing "Smith" would include "Smith" but not "smith" or "SMITH."
  - Mark **Find Whole Words Only** to only look for records where the text is separated from any other text. For example, typing "John" would include "John" but not "Johnson."
5. Click **OK** to filter your list.

The filter searches your file, and then displays only those records that meet the filter criteria. The rest of your list is hidden from view until you turn the filter off.

To turn the filter off and see all of your records, open the **Data** menu and choose **Display All Records**.

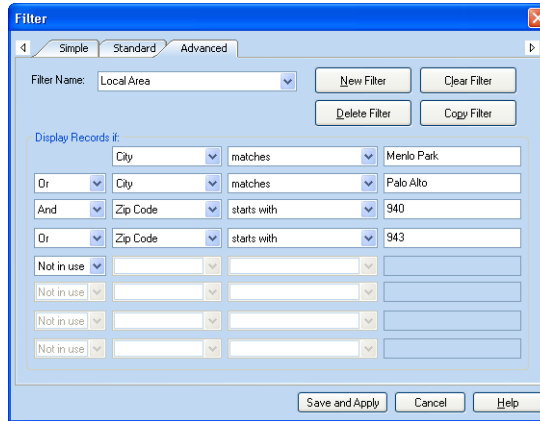
## Creating an Advanced Filter

The Advanced filter allows you to filter records based on multiple criteria, such as text contained in a field or the status of a check box. You can create several sets of filter criteria and save them to use them again.



Filter Records

1. Open the **Data** menu and choose **Filter** or click the **Filter Records** button in the toolbar to open the Filter dialog.



2. Click the **Advanced** tab at the top of the Filter dialog.
3. Click the **New Filter** button to create a new filter.

If you want to edit an existing filter, choose the filter from the **Filter Name** drop-down list. For more information, see [“Modifying an Advanced Filter” on page 104](#).

4. Enter a name for the new filter in the **Filter Name** box.
5. Enter the criteria for the filter.

DataBase applies the filter criteria to each record individually. If you use multiple criteria, consider your conditional statements carefully:

- Combining criteria with **And** means that *all* of the filter criteria must be found in the same record.
- Combining criteria with **Or** means that at least *one* of the filter criteria is in the record.

For example, if you want to display only the records from Arizona and California, filter for records where the state field is AZ **Or** CA. If you used **And**, DataBase would try to find records that contained both AZ and CA in the state field.

6. Click **Save and Apply** to apply and save the filter.

The filter searches your file and then displays only those records that meet the filter criteria. The rest of your list is hidden from view until you turn the filter off.

*This isn't a case-sensitive search, so it doesn't matter whether or not you use capital letters.*

*To turn the filter off and see all of your records, open the **Data** menu and choose **Display All Records**.*

## Modifying an Advanced Filter

After creating an advanced filter, you can Edit, Delete, or Copy the filter.

The screenshot shows the 'Filter' dialog box with the 'Advanced' tab active. The 'Filter Name' is 'Local Area'. The 'Display Records if:' section contains a logical expression: (City matches Menlo Park) Or (City matches Palo Alto) And (Zip Code starts with 940) Or (Zip Code starts with 943). The 'Not in use' options are also visible for each condition. The 'Save and Apply', 'Cancel', and 'Help' buttons are at the bottom.

### To Edit an Advanced Filter

1. Choose the filter from the **Filter Name** drop-down list.
2. Make any changes that you want to the current filter.

The changes you make will be saved with this filter. If you want to keep the current filter and make a new filter based on similar criteria, you can copy the selected filter and give it a new name (see [“To Copy an Advanced Filter” on page 104](#)).

3. Click **Save and Apply**.

### To Delete an Advanced Filter

1. Choose the filter from the **Filter Name** drop-down list.
2. Click **Delete Filter**.

The filter is removed from the **Filter Name** list. If you deleted a filter by mistake, click the **Cancel** button to close the dialog.

### To Copy an Advanced Filter

1. Choose the filter from the **Filter Name** drop-down list.
2. Click **Copy Filter**.
3. Enter a name for the new filter in the **Filter Name** drop-down list.
4. Make any changes that you want to the filter criteria (see [“Creating an Advanced Filter” on page 103](#)).
5. Click **Save and Apply**.

*The original filter name and the new filter name appear in the **Filter Name** list.*

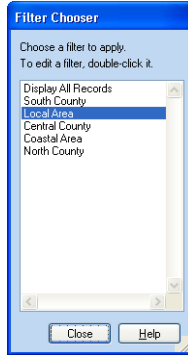




Choose Filter

## Choosing an Advanced Filter

You can choose and apply a saved filter using the Filter Chooser palette. To open the Filter Chooser palette, open the **Data** menu and choose **Choose Filter** or click the **Choose Filter** button in the toolbar.



- To apply a saved filter to your data, choose the filter from the list.
- To modify a saved filter, double-click the filter in the list or right-click the filter and choose **Edit Filter** from the shortcut menu.
- To delete a filter, right-click the filter in the list and choose **Delete Filter** from the shortcut menu.
- To create a new filter, right-click the filter list and choose **New Filter** from the shortcut menu.
- To turn off all filters and display all of your records, choose **Display All Records** from the list.

The Filter Chooser palette can remain open, allowing you to choose and apply the filters you've saved. To close the Filter Chooser palette, click **Close**.

For information about creating and editing an advanced filter, see [“Creating an Advanced Filter” on page 103](#).



# Managing Records

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## Overview

DataBase allows you to select a single record or multiple records for printing, copying, or deleting. You can also remove duplicate records from your database.

## Selecting a Group of Records

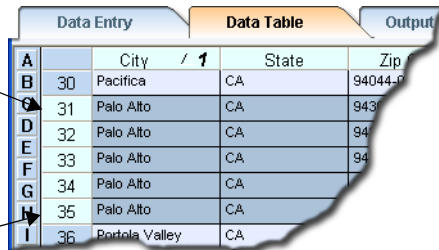
You can select a single record by clicking on any of the fields for that record in the Data Table window. When you return to the Data Entry window, the selected record appears.

To select a group of records, use one of the following methods:

- To select a group of consecutive records, click and drag along the record numbers on the left side of the Data Table window to highlight the records you want in the group. You can also select consecutive records by clicking the first record number in the group, and then holding the **SHIFT** key down and clicking the last record number in the group.

Click the record number for the first record in the group.

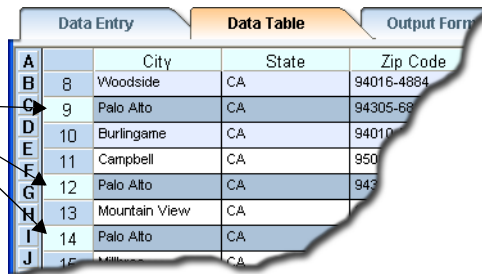
Hold down the **SHIFT** key and click the record number for the last record in the group.



	Data Entry	Data Table	Output
A		City / 1	State
B	30	Pacifica	CA
C	31	Palo Alto	CA
D	32	Palo Alto	CA
E	33	Palo Alto	CA
F	34	Palo Alto	CA
G	35	Palo Alto	CA
H	36	Portola Valley	CA

- To select non-consecutive records, hold the **CTRL** key down and click each record number.

Hold down the **CTRL** key and click each record number that you want to include in the group.



	Data Entry	Data Table	Output Form
A		City	State
B	8	Woodside	CA
C	9	Palo Alto	CA
D	10	Burlingame	CA
E	11	Campbell	CA
F	12	Palo Alto	CA
G	13	Mountain View	CA
H	14	Palo Alto	CA
I	15	Millbrae	CA

You can use the Find dialog or the Sort dialog to help locate the records you want to select.

To remove a selected record from the group, hold down the **CTRL** key and click the record's number.

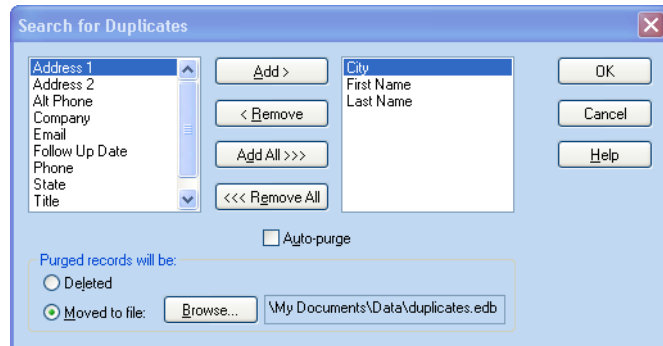
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## Removing Duplicate Records

DataBase can search for and remove duplicate records from your file. This can be a useful feature if you have gathered addresses from several different sources.

1. Open the **Data** menu and choose **Search for Duplicates** to open the Search for Duplicates dialog.

*Because there might be errors or incomplete data in some records, you might need to search for duplicates several times using different criteria to remove all of the duplicate records from your database.*



2. Choose which fields you want DataBase to use when comparing records.

Choose the fields carefully, since duplicate records might not be exact matches of each other. Using too many fields might not find some of the duplicates, but using too few fields might remove non-duplicate records.

For example, if you use the first name field, an error in one of the records would prevent it from being identified as a duplicate. If you don't use the first name field, the records for two brothers living at the same address might be identified as duplicates.

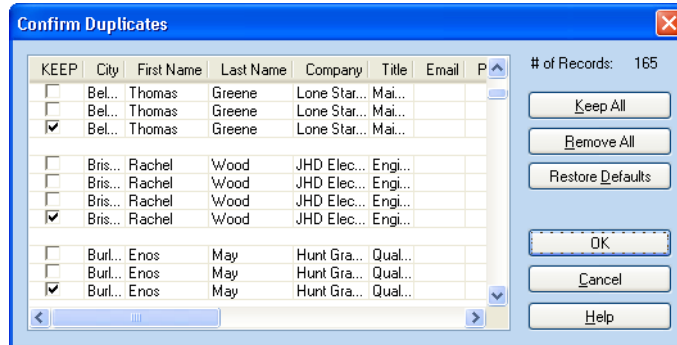
3. Choose either automatic or manual confirmation of duplicate records:
  - To automatically remove any records that meet the criteria you enter, mark the **Auto-purge** check box.
  - To verify the duplicates yourself, clear the **Auto-purge** check box.
4. Decide whether you want to delete the duplicates or store them in a separate file.

To create a file for the duplicates, choose **Moved to File** and then click the **Browse** button to choose a name and location for the file.

5. Click **OK** to begin searching for possible duplicates.

## Verifying Duplicates

Unless you chose the **Auto-purge** option in the Search for Duplicates dialog, DataBase opens the Confirm Duplicates dialog each time it finds a set of suspected duplicates.



To resize the columns so you can see your data better, position the cursor on the line between two field names. Then, click and drag the column. Release the mouse button to set the new column width.

1. Choose the records that you want to keep in your database by marking the **Keep** check boxes on the left side of the records.
  - To keep all of the records listed in the dialog, click **Keep All**.
  - To remove all of the records listed in the dialog, click **Remove All**.
  - To return to the standard settings, so that only the last record from each set of duplicates is marked, click **Restore Defaults**.
2. Click **OK** to remove the records from your database. Click **Cancel** if you don't want to make any of the changes.

---

## Deleting Records

You can delete a single record or a group of records.

- To delete a single record, view it in the Data Entry window or select it in the Data Table window, and then press DELETE.
- To delete a group of records, select the records in the Data Table window and press DELETE, or use the Delete Record dialog to delete a group of consecutive records.

For information about selecting records in the Data Table window, see [“Selecting a Group of Records” on page 108](#).

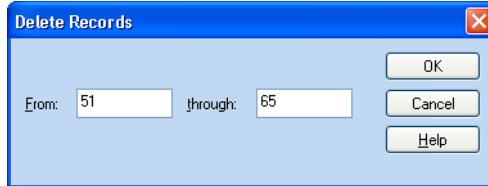
## Deleting Consecutive Records

To delete consecutive records, select the records in the Data Table window and press DELETE, or use the Delete Record dialog.

To use the Delete Record dialog:

*The record numbers appear above the record in the Data Entry window, and on the left side of the Data Table.*

1. Open the **Edit** menu and choose **Delete Records** to open the Delete Record dialog.



2. Enter the first number of the group in the **From** box and the last number of the group in the **Through** box.  
If you're only deleting one record, enter the same record number in both boxes.
3. Click **OK**.





# OUTPUT FORMS

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<b>Choosing a Form for Printing</b>	<b>115</b>
<b>Customizing a Form Design</b>	<b>123</b>
<b>Creating a New Form Design</b>	<b>129</b>
<b>Working With Design Objects</b>	<b>141</b>
<b>Aligning Objects</b>	<b>147</b>
<b>Adding Text to a Form</b>	<b>155</b>
<b>Adding Pictures and Drawing Objects</b>	<b>169</b>
<b>Using Barcodes</b>	<b>183</b>



# Choosing a Form for Printing

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## Overview

DataBase comes with several pre-designed labels and forms in the most popular sizes. If the form you're looking for isn't in the Forms Library, you can choose from a more extensive list in the Change Form Size dialog or create your own custom form size.

Regular users can customize only the forms in their **Personal Output Forms** list. The forms in the **Shared Output Forms** list and the Data Entry Form can be customized only by the database administrator.

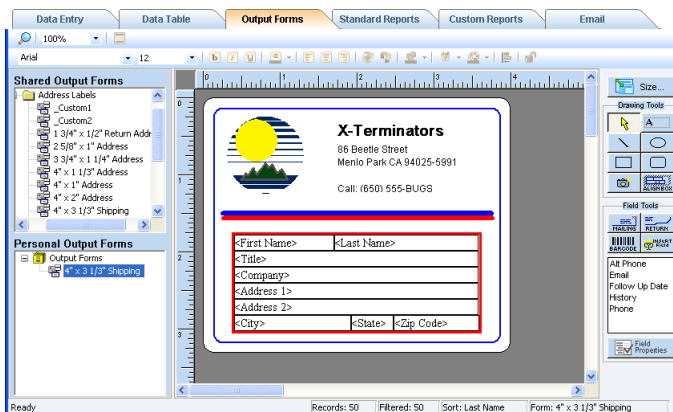
The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login. You can't add a form from a Regular user's **Personal Output Forms** list to the **Shared Output Forms** list.

Regular user's can copy forms from the **Shared Output Forms** list to their **Personal Output Forms** list. However, you can't add a form from a Regular user's **Personal Output Forms** list to the **Shared Output Forms** list.

## Viewing the Form Library

To display the Output Forms Window, click the **Output Forms** tab. A list of form types appears on the left side of the Output Forms window.

The Forms Library on the left side of the Output Forms window displays the different form designs in the file.



Using the Forms Library, you can choose or change the form displayed in the Output Forms window, rename existing forms, organize the list of forms, and create new forms.

---

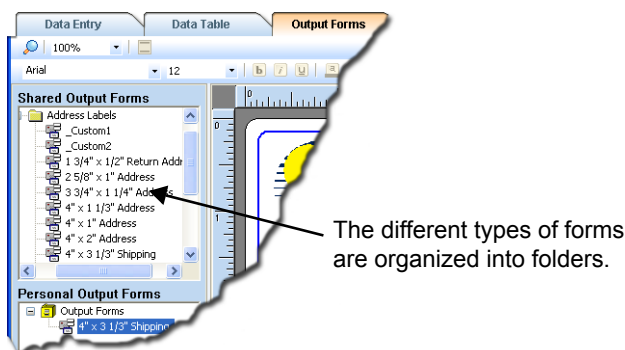
## Choosing From the Form Library

To change the form that appears in the Output Forms window, choose a different form from the Forms Library. To view the Forms Library, click the **Output Forms** tab.

Regular users can choose from the **Shared Output Forms** list and their **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

1. Double-click a folder to open it.



2. Click the form name that you want.

The selected form appears on the right side of the window.



**NOTE:** If you have created a Custom Database, there will be no forms in the list until you create them (see “[Creating a New Form](#)” on page 119).

---

## Renaming Forms and Folders

Regular users can only rename forms and folders in their **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

1. Click the **Output Forms** tab to view the Forms Library.
2. Right-click the form or folder name that you want to change.
3. Choose **Rename** from the shortcut menu.
4. Type the new name for the form or folder.
5. Press ENTER.

## Adding New Folders

Add new folders to organize your forms and folders in the Forms Library.

Regular users can only add new folders to their **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

1. Click the **Output Forms** tab to view the Forms Library.
2. Choose a level for the folder:
  - To place the new folder on the first level, right-click the file cabinet icon at the top of the list.
  - To create a folder within a folder, right-click the folder where you want to place the new folder.



For example, if you want to create a **Personal** folder within your **Address Labels** folder, right-click the **Address Labels** folder in the Forms Library.

3. Choose **New > New Folder** from the shortcut menu that opens.
4. Type the name for the new folder.
5. Press ENTER.

## Copying and Moving Forms Between Folders

Copying forms is a good way to begin a new form without starting from scratch. Moving forms can help you organize the forms in the Forms Library.

Regular users can fully customize their **Personal Output Forms** list. However, they can only copy from the **Shared Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login. You can't add a form from a Regular user's **Personal Output Forms** list to the **Shared Output Forms** list.

Although Regular user's can copy forms from the **Shared Output Forms** list to their **Personal Output Forms** list, they can't add a form from their **Personal Output Forms** list to the **Shared Output Forms** list.

- When you "copy" a form, you make a copy of the original form and insert (paste) it into another location. The original form remains unchanged.
- When you "move" a form, you remove (cut) it from one location and insert (paste) it into another location.

*You can only copy or move forms and folders in the same DataBase file. You can't paste a form from one file into another file.*

## **To Copy or Move a Form to Another Folder**

Click the **Output Forms** tab to view the Forms Library.

1. Click on the folder or form that you want to copy or move.
2. Open the **Edit** menu and choose the option that you want to use:
  - To make a copy of the item, choose **Copy**.
  - To move the item, choose **Cut**.
3. Click on the folder where you want the form or folder.

If you want to make a copy of the form in the same folder as the original, click on the original folder.
4. Open the **Edit** menu and choose **Paste**.

## **Creating a New Form**

The easiest way to create a new form design is make a copy of an existing form, and then customize it.

- For information about copying an existing form, see [“Copying and Moving Forms Between Folders” on page 118](#).
- For information about customizing an existing form, see [“Customizing a Form Design” on page 123](#).

Regular users can only add forms to **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

If you want help starting the design of your new form, open the **Format** menu and choose **New Form Using Wizard** to start the Form Wizard. For information about using the Form Wizard, see [“Using the Form Wizard” on page 130](#).

To create a new form without using the wizard, see [“Designing a Form From Scratch” on page 139](#).

## Deleting Forms and Folders

You can delete forms or folders you don't need.

Regular users can only delete forms and folders from their **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

1. Click the **Output Forms** tab to view the Forms Library.
2. Right-click the folder or form that you want to delete.



**CAUTION:** Deleting a folder also deletes any forms contained within that folder.

---

3. Choose **Delete** from the shortcut menu.  
A dialog opens to confirm that you want to delete the item.
4. Click **Yes** to delete the item.

---

## Choosing From the Change Form Size Dialog

If you like the design of a form, but it isn't set up for the correct form size or type, you can easily change it to the size or type you need.

For example, you can change the form from a 4" x 1" label to a 4¼" x 2" label, or from a shipping label to an envelope.

Regular users can only change the forms in their **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.





## Change Form Size

### To Change the Form Size

1. Open the **Format** menu and choose **Change Form Size**, or click the **Change Form Size** button, to open the Change Form Size dialog.

2. Narrow the list of choices by doing one or all the following:
  - If you have already purchased form stock that you want to print on, such as a box of shipping labels, type the part number into the **Part Number** box. DataBase looks for a match and displays a sample sheet in the dialog.
  - If you aren't sure of the part number, choose the **Type**, **Brand**, and **Feed Method** to match the type of form you have.

If you aren't sure about the choices in a drop-down list, choose **All**.

3. Use the list at the bottom of the dialog to find the form size and type you want.

To sort the list by size, description, or part number, click on a column heading. For example, click on **Description** to sort the list by the descriptions.

4. Click on the form size you want to preview the selected item.

If the preview doesn't quite match your forms, you might want to use it as the basis for a custom form size (see [“Creating a Custom Form Size” on page 122](#)).

5. When the preview matches your form, click **OK**.



**CAUTION:** If the preview doesn't match, you might be trying to print on photocopier labels, and not labels for laser or ink-jet printers. If this is the case, consider buying new labels. Photocopier labels weren't designed to withstand the heat or bending that occurs in printers, and might damage your printer.

---

## Creating a Custom Form Size

If you don't see the form size you want, you can create a new size.



**CAUTION:** If you're designing a form, and you don't see the size you need in the Change Form Size dialog, you might be trying to use photocopier labels instead of labels made for laser or ink-jet printers. If this is the case, consider buying new labels. Photocopier labels weren't designed to withstand the heat or bending that occurs in printers, and might damage your printer.

*Depending on the form you selected, the **Custom** button might be dimmed to indicate it can't be customized.*

---

### To Make a Custom Form Size

1. Open the **Format** menu and choose **Change Form Size** to open the Change Form Size dialog.
2. Choose the form size closest to what you want.
3. Click the **Custom** button to open the Customize Size dialog.
4. Enter a description and the specifications for the new size.
5. Click the **Preview** button to see how the changes affect the page.
6. Click **OK** to return to the Change Form Size dialog.
7. Click **OK** in the Change Form Size dialog to change the current form to the new size.

The custom size is available in the Change Form Size dialog from now on, but it'll only be available for the current file. If you open another file, you'll have to create the custom size again.

---

## Buying Paper for Your Labels and Forms

DataBase works with any label or form size you can find. Many form sizes are listed in the Change Form Size dialog, or you can make a custom size. Most computer and office supply stores offer a wide selection of these forms. Forms and labels can also be ordered directly from the manufacturer. Ordering forms direct can often be less expensive.

For ordering information, open the **Help** menu and choose **Ordering Information**.



**NOTE:** Don't use photocopier labels. Photocopier labels weren't designed to withstand the heat or bending that occurs in printers, and might damage your printer.

# Customizing a Form Design

---

## Overview

Although DataBase has many forms that cover most needs, there will be times when you want to customize a form.

Regular users can only customize the forms in their **Personal Output Forms** list. The forms in the **Shared Output Forms** list and the Data Entry Form can only be customized by the database administrator.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

Regular user's can copy forms from the **Shared Output Forms** list to their **Personal Output Forms** list. However, you can't add a form from a Regular user's **Personal Output Forms** list to the **Shared Output Forms**.

To modify the Data Entry Form open the Edit Data Entry Form window (see [“Entering Data in the Data Entry Window” on page 69](#)). If you're satisfied with the design in the Data Entry window, you can print it (see [“Printing the Data Entry Form” on page 70](#)).



Change Form Size

You can change the design of a form you want to print in the Output Forms window. For example, you can change a form size from a 3" x 1" address label to a 5" x 2" shipping label by opening the **Format** menu and choosing **Change Form Size** or by clicking the **Change Form Size** button. For more information about changing the form size, see [“Choosing a Form for Printing” on page 115](#).

In the Output Forms window, you can move, resize, and add objects to the form. Use the tools along the right side of the window to change the form's design.



**NOTE:** You can't enter or edit your records in the Output Forms window.

---

## Editing Your Form Design

Before you begin designing a form, read the following sections to learn about the type of form you're designing.

Regular users can only customize the forms in their **Personal Output Forms** list. The forms in the **Shared Output Forms** list and the Data Entry Form can only be customized by the database administrator.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

Regular user's can copy forms from the **Shared Output Forms** list to their **Personal Output Forms** list. However, you can't add a form from a Regular user's **Personal Output Forms** list to the **Shared Output Forms** list.

### Designing Labels, Cards, and Envelopes

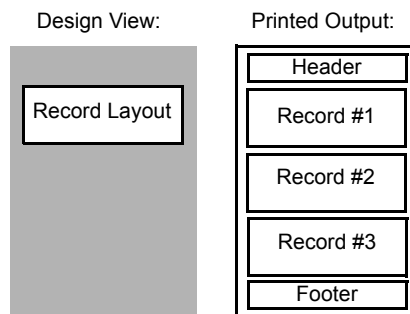
If you're designing labels, cards, or envelopes, the design displayed in the window is a representation of a typical record. Use the toolbar on the left side of the Output Forms window to add fields, text, and graphics.

The design on-screen should look almost exactly like you would want a printed label, card, or envelope to look.

### Designing Booklets

Booklet forms print several records on one page. When you design a booklet form, your form shows how one record will appear on the page. The number of records that actually print on the page depends on the form size and type. You can check or change the form size by opening the **Format** menu and choosing **Change Form Size**.

The example below illustrates the difference between the design view of the booklet and the printed booklet.



To edit the header or footer of the booklet pages, open the **Format** menu in the Output Forms window and choose **Header/Footer** (see [“Adding Headers and Footers to Booklets” on page 166](#)).

## Designing Form Letters

Form letters can be created in either the Output Forms window or with the Email Editor. The method you use to create the form letter depends on the layout and content you need to include.

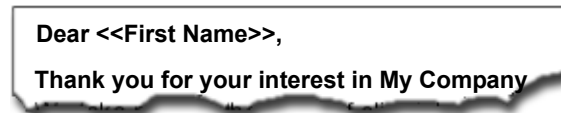
- The **Output Forms Window** allows for exact placement of text, fields, and graphics. This can be essential when creating form letters like flyers or advertisements.
- The **Email Editor** allows you to format fonts, a feature not available in the Output Forms window. However, the Email Editor lacks the design and placement of fields and text found in the Design window. For more information, see [“Creating Form Letters” on page 235](#).

### *Creating a Form Letter in the Design Window*

Designs for form letters are similar to labels. The design should look like a typical form letter.

The key to designing form letters is that instead of adding the fields to the design, you type the field names into text boxes, along with the text for the form letter (see [“Adding a Text Box” on page 159](#)).

When you get to a place where you want to insert data from your database, type two less-than signs (<<) followed by the field name, and then type two greater-than signs (>>).

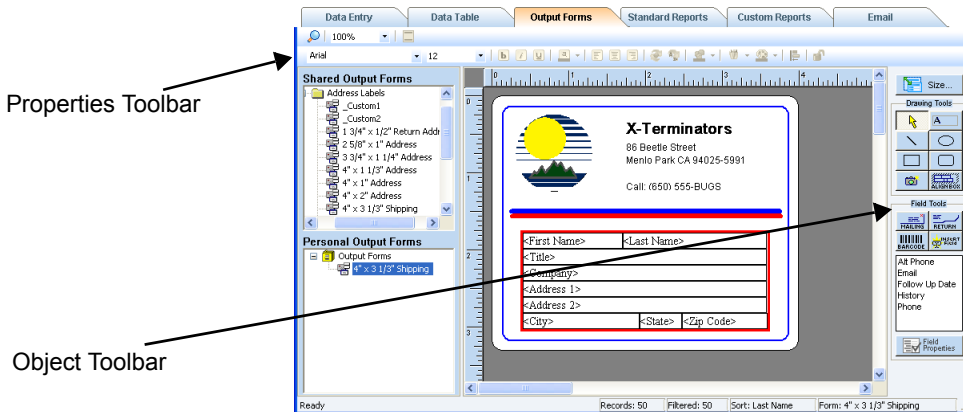


Use the Object Toolbar to add text boxes and graphics to your form design (see [“Adding Text to a Form” on page 155](#)).

When you print the form letter, the field names are replaced by data. If you want to see how the form letter will look, open the **File** menu and choose **Print Preview > Active Output Form**. The Preview window displays your data as it'll print.

## Customizing the Output Forms Window

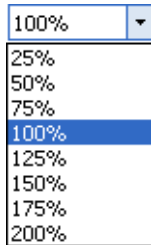
You can customize the way the Output Forms Window looks.



The view of your Output Forms in the work area can be enlarged or reduced, the Properties Toolbar and the Object Toolbar can be repositioned or removed, and the rulers can be switched on and off.

## Enlarging or Reducing the Screen View

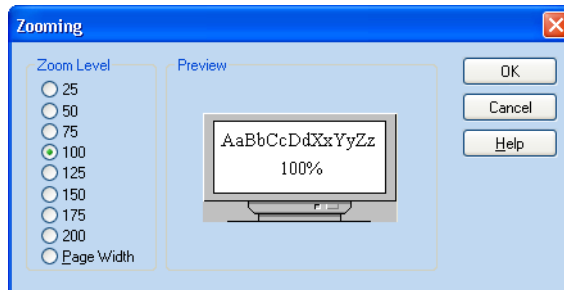
You can select a percentage to enlarge or reduce the form on the screen from the Zoom drop-down list in the main toolbar.



Zoom

Other zoom options are available in the Zooming dialog.

1. Open the **View** menu and choose **Zoom**, or click the **Zoom** button in the toolbar, to open the Zooming dialog.



2. Choose the view size you want from the options on the left.

The preview on the right displays how 10-point type will look at the zoom level you chose.

3. Click **OK**.

The Zooming dialog is also available in the Data Entry window.

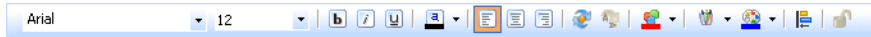
Zoom options can also be selected from the shortcut menu that pops up when you right-click on the work area.



**NOTE:** Zooming the screen view changes the size that the form displays in the Output Forms window or Data Entry window. However, it won't change the actual size of the form that is printed.

## Moving the Properties Toolbar

The Properties Toolbar can be attached to the top or the bottom of the work area, or it can be left floating. It can also be removed from the screen.



To move the Properties Toolbar:

- Click and drag it to any location on the screen.
- Attach it to the top or bottom of the work area by dragging it until it touches or overlaps the edge of the work area.

To switch the Properties Toolbar on or off, open the **View** menu and choose **Properties Toolbar**.



Object Toolbar

## Moving the Object Toolbar

The Object Toolbar can be attached to the left or the right of the work area, or it can be left floating. It can also be removed from the screen.

To move the Object Toolbar:

- Click and drag it to any location on the screen.
- Attach it to the left or right side of the work area by dragging it until it touches or overlaps the edge of the Output Forms window.

To switch the Object Toolbar on or off, open the **View** menu and choose **Object Toolbar**.

## Viewing the Rulers

Use the rulers to help size and align objects on your form. Guidelines extend from an object to the rulers when the object is selected.

To switch the rulers on or off, open the **View** menu and choose **Rulers**.

To switch the rulers to metric units (centimeters instead of inches):

1. Open the **View** menu and choose **Grid** to open the Grid dialog.
2. Mark the **Use Metric Units** check box at the bottom of the dialog.
3. Click **OK**.

For more information about grid options, see [“Using the Grid” on page 148](#).



# Creating a New Form Design

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## Overview

The easiest way to create a new form design is make a copy of an existing form, and then customize it.

- For information about copying an existing form, see [“Copying and Moving Forms Between Folders” on page 118](#).
- For information about customizing an existing form, see [“Customizing a Form Design” on page 123](#).

Regular users can only add forms to **Personal Output Forms** list.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

If you want help starting the design of your new form, open the **Format** menu and choose **New Form Using Wizard** to start the Form Wizard. For information about using the Form Wizard, see [“Using the Form Wizard” on page 130](#).

To create a new form without using the wizard, see [“Designing a Form From Scratch” on page 139](#).

---

## Using the Form Wizard

The Form Wizard helps you choose the correct form size to match your label or paper stock, add a clipart image to your design, and choose the fields that you want on the new design. Use the wizard when existing forms in the Form Library don't meet your needs or aren't easily modified for you to use.

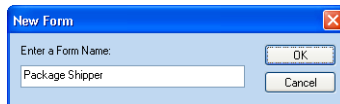
After completing the Form Wizard, the DataBase Design window opens so that you can further modify the form using the Object toolbar (see [“Customizing a Form Design” on page 123](#)).

If you find a form in the Form Library that can be modified to meet your needs, you can make a copy of the existing form and then customize it in the Design window. For information, see [“Copying and Moving Forms Between Folders” on page 118](#) and [“Customizing a Form Design” on page 123](#).

---

## Starting the Form Wizard

1. Click the **Design** tab to view the Design window.
2. Click the folder in the Form Library where you want to place the new form.
3. Open the **Format** menu and choose **New Form Using Wizard** to open the New Form dialog.



4. Type a name for the new form and click **OK** to open the first step of the Form Wizard.

---

## Choosing a Form Size

The Form Wizard allows you to choose the form you want to use for printing your records. You can enter the part number and brand, or choose from a list that describes the forms.

### Entering the Part Number and Brand

When the Form Wizard opens, you can choose the name of the paper manufacturer and enter the part number of the label or paper stock. If you don't know this information, click **Next**.



1. Enter the part number in the **Part Number** box.

The part number probably is printed on the outside of the package of labels or cards. If you don't know the part number, leave this box blank.

2. To choose the brand of label or paper stock that you want to use, click the **Brand** drop-down list and choose the brand.

If you don't know the brand or can't find it in the list, choose **<All>**. If you've already entered a part number for a brand that isn't in the list, delete the part number in the **Part Number** box before continuing.

3. Click **Next**.



**NOTE:** If you don't know the part number or the brand, the Form Wizard can help you choose a form in the next step.

---

## Verifying or Choosing a Form

The second step of the Form Wizard allows you to either verify that the part number you entered in the previous step matches your label or paper stock or to choose a form from the list.

### Verifying a Form

The **Part Number** and **Brand** you entered in the first step of the Form Wizard appear in Step 2.

The screenshot shows the 'DataBase Professional Form Wizard Step 2 of 5' dialog box. It contains a text area with instructions: 'Please verify that the selected label matches the one you are using. If the label doesn't match, select your Printer Type and/or Label Type and then choose your label (or one that matches its size and layout) from the label list. To continue click Next.' Below this are input fields for 'Part Number' (12655), 'Brand' (<All>), 'Printer Type' (Both), and 'Label Type' (<All>). A list box shows various label sizes and descriptions, with '4" x 3 1/3" Shipping Labels' selected. To the right is a 'Sheet Preview' showing a 2x3 grid of labels. At the bottom are buttons for '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

Size	Description	Part #
4" x 3 1/3"	Shipping Labels	12655
4" x 3 1/3"	Shipping Labels	12655
4" x 3 1/3"	Shipping Labels	12655
4" x 5"	Shipping Labels	12656
4" x 1"	Address Labels	12657
4" x 1"	Address Labels	12657
8" x 3 1/2"	Warehouse Labels	12658
8.5" x 5.5"	Shipping Labels	12659
8 1/2" x 11"	Full Sheet	12660
1 3/4" x 1/2"	Return Address Labels	12661
1" x 1"	Price Tags	12662
1" x 1"	Price Tags	12662

If you entered a part number, the form size and description are selected in the list and a sheet preview appears on the right side of the dialog.

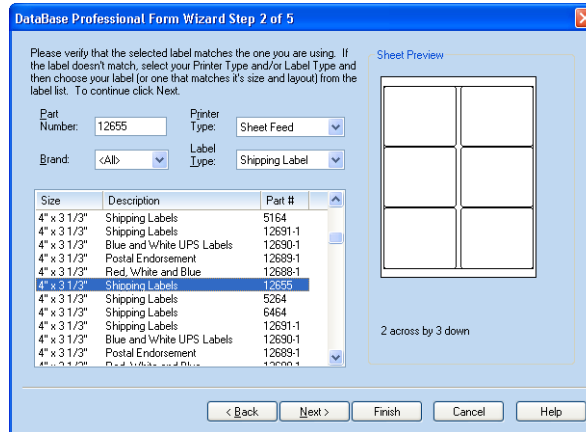
Verify the information in the display to make sure that it matches the form you want to use.

- If the information is correct, click **Next** to open the next step of the Form Wizard.
- If the information isn't correct, make sure that the part number is entered correctly or choose a form from the list (see [“Choosing a Form” on page 133](#)).

If you entered only the brand in the first step, the forms of the brand you entered are listed in the description list in step 2. You can scroll the list of forms to choose the form you want to use (see [“Choosing a Form” on page 133](#)).

## Choosing a Form

If you didn't enter a part number in the previous step of the Form Wizard, you can choose the form in the list displayed in Step 2.



Please verify that the selected label matches the one you are using. If the label doesn't match, select your Printer Type and/or Label Type and then choose your label (or one that matches it's size and layout) from the label list. To continue click Next.

Part Number: 12655 Printer Type: Sheet Feed  
Brand: <All> Label Type: Shipping Label

Size	Description	Part #
4" x 3 1/3"	Shipping Labels	5164
4" x 3 1/3"	Shipping Labels	12691-1
4" x 3 1/3"	Blue and White UPS Labels	12690-1
4" x 3 1/3"	Postal Endorsement	12689-1
4" x 3 1/3"	Red, White and Blue	12688-1
4" x 3 1/3"	Shipping Labels	12655
4" x 3 1/3"	Shipping Labels	5264
4" x 3 1/3"	Shipping Labels	6464
4" x 3 1/3"	Shipping Labels	12691-1
4" x 3 1/3"	Blue and White UPS Labels	12690-1
4" x 3 1/3"	Postal Endorsement	12689-1
4" x 3 1/3"	Red, White and Blue	12688-1

Sheet Preview

2 across by 3 down

< Back Next > Finish Cancel Help

You can reduce the number of forms listed by entering information in the **Printer Type**, **Brand**, or **Label Type** drop-down lists.

1. Click in the **Printer Type** drop-down list and choose your printer type.
  - Choose **Form Feed** to display continuous-feed forms.
  - Choose **Sheet Feed** to display forms designed for use in a laser or ink-jet printer.
  - Choose **Both** to display both Form Feed and Sheet Feed forms in the form list.
2. Click in the **Label Type** drop-down list to choose the type of form you're using, such as address label, envelope, or shipping label. If you're not sure of the form type, choose **<All>**.
3. Scroll down through the list and click a form description to display a preview of the forms on the right.
4. After you choose a form that matches the labels or cards you're using, click **Next** to view the next step in the Form Wizard.

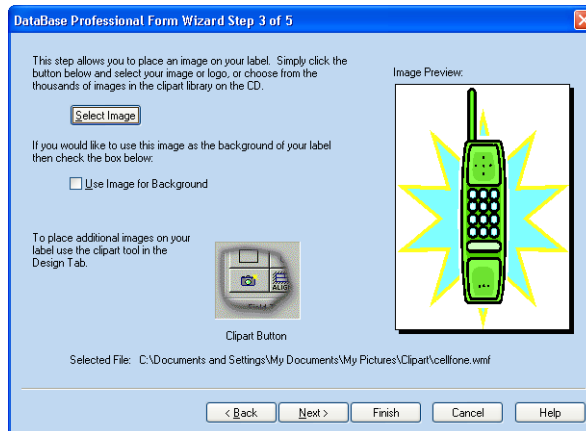


**NOTE:** If you can't find your forms in the list, choose the closest match. You can customize the form size (see ["Creating a Custom Form Size" on page 122](#)).

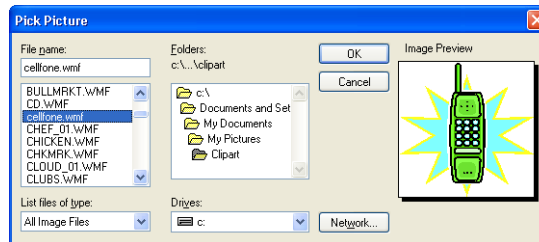
## Choosing an Image File

The third step of the Form Wizard allows you to choose an image file to place on your form. You can choose a clipart image from the DataBase

Clipart folder or choose an image file of your choice. After you're finished using the Form Wizard, you can modify the image and add more graphics to your form.



1. Click the **Select Image** button to open the Pick Picture dialog.



*For more information about adding images to your forms, see [“Adding Clipart”](#) on page 172.*

2. Choose the image file that you want to place on your form.
3. Click **OK** to view the clipart on the right side of the Form Wizard.  
To place the image as a background on your form, check the **Use Image for Background** box in the Form Wizard (see [“Adding a Background Image”](#) on page 170).
4. When you're finished adding the image to your form, click **Next**.

---

## Choosing the Type of Form Design

In the fourth step of the Form Wizard, you can choose the type of form you want to design.



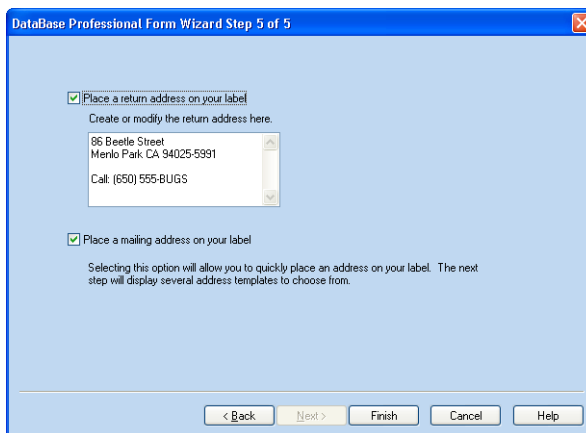
- **Address label** lets you choose the address information that you want to include on your form (see [“Adding an Address to Your Form” on page 136](#)).
- **Other** lets you choose any of the available fields to place on your form (see [“Adding Fields to Other Kinds of Labels” on page 138](#)).

After choosing one of these two options, click **Next** to continue.

---

## Adding an Address to Your Form

If you chose to create an **Address** label in the previous step, the Form Wizard displays the following step for choosing the address information that you want on your form.



DataBase Professional Form Wizard Step 5 of 5

☒ Place a return address on your label

Create or modify the return address here.

86 Beetle Street  
Menlo Park CA 94025-5991  
Call: (650) 555-BUGS

☒ Place a mailing address on your label

Selecting this option will allow you to quickly place an address on your label. The next step will display several address templates to choose from.

< Back   Next >   Finish   Cancel   Help

In this step of the Form Wizard you can enter your return address and choose to add a mailing address to your form.

To create a return address in the Form Wizard, check the **Place a return address on your label** box.

Click in the return address box and type the return address that you want to print on your forms.

To add a mailing address, check the **Place a mailing address on your label** box. After the Form Wizard closes, the Mailing Address dialog opens allowing you to choose a mailing address type. For information about choosing a mailing address type, see [“Selecting a Mailing Address” on page 137](#).

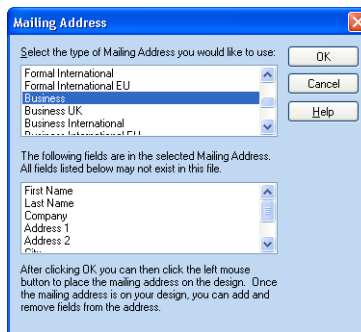
To close the Form Wizard, click **Finish**.



## Selecting a Mailing Address

When you choose **Place a mailing address on your label**, the Mailing Address dialog opens.

The Mailing Address dialog allows you to choose the group of fields for the address. These fields are placed inside of an Alignment Box. An Alignment Box keeps the fields in a group, so they can be moved as a unit. It also suppresses blank lines and extra spaces and can optionally shrink text to fit within the box when the forms are printed. For more information about using alignment boxes, see [“Using an Alignment Box” on page 150](#).



1. Choose an address type in the list at the top of the dialog.  
The fields included in each mailing address type are listed in the lower box.
2. Click **OK** to close the Mailing Address dialog and open the Design window.
3. Move the cursor to the work area and click to place the address fields there.

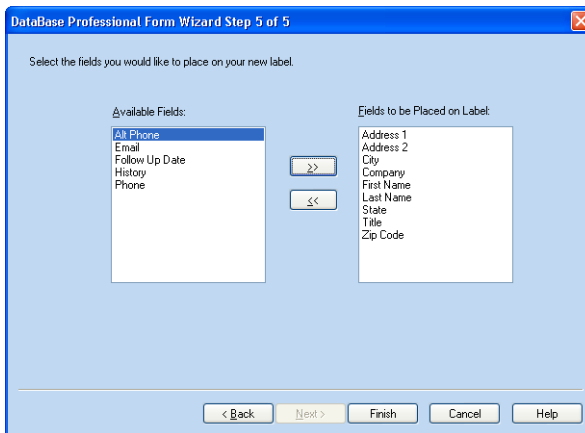
For information about modifying the form design, see [“Customizing a Form Design” on page 123](#).

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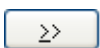
## Adding Fields to Other Kinds of Labels

You enter the data for your forms in fields, such as Last Name, Address, or Work Phone. The field names describe the data contained in the field.

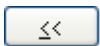
When you select **Other**, rather than **Address label**, as your label type in the New Label Wizard, you can add to your label many available fields.



Choose the fields you want from the **Available Fields** list. The fields in the **Fields to be Placed on Label** list are placed on your form.



To add a field to the **Fields to be Placed on Label** list, choose the field from the **Available Fields** list and then click the right double-arrow button located in the middle of the dialog.



To remove a field from the **Fields to be Placed on Label** list, click the field listed on the right and then click the left double-arrow button.

When you're working with your form in the Design window, you can add fields, move fields, and remove fields. For more information about adding fields to your form, see [“Adding Fields for Data” on page 156](#).

When you're finished choosing the fields, click **Finish**.

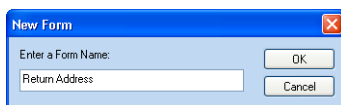
For information about modifying the form design, see [“Customizing a Form Design” on page 123](#).

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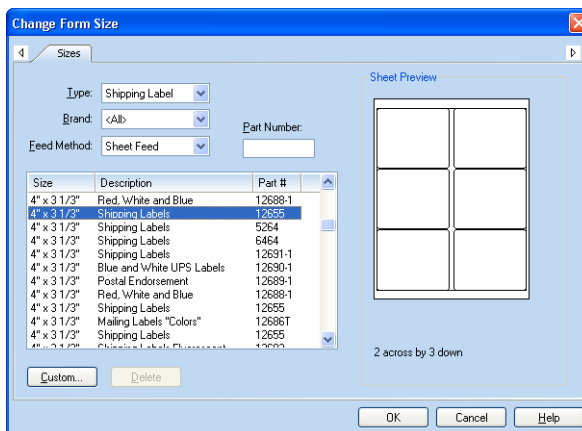
## Designing a Form From Scratch

You can create a new label without using the New Label Wizard.

1. Click the **Output Forms** tab to view the Output Forms window.
2. Click the folder in the Form Library where you want to place the new form.
3. Open the **Format** menu and choose **New Form** to open the New Form dialog.



4. Type a name for the new form and click **OK** to open the Change Form Size dialog.



5. Choose the type (label, envelope, etc.) and size of the new form (see [“Choosing From the Change Form Size Dialog”](#) on page 120).
6. Click **OK** in the Change Form Size dialog to open the Design window.  
The new design name appears in the folder for the label-type you selected.
7. Use the Design window to design the form (see [“Customizing a Form Design”](#) on page 123).



# Working With Design Objects

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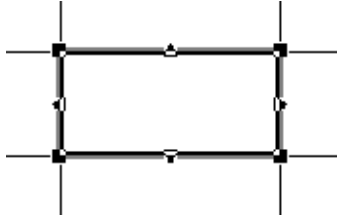
## Overview

An object is an item you can move, resize, add, or remove from the form. Objects include text boxes, fields, clipart, rectangles, circles, lines, and OLE objects. Before you can work with an object, you need to select it.

---

## Selecting a Single Object

Select a single object by clicking on it. A selected object has a rectangular frame.



To cancel the selection of an object, click anywhere on the work area away from the object.

To select an object within an already selected object, cancel the selection of the larger object, and then click the smaller object to select it.



The bug can't be selected, because it's inside of the selected circle.



Click on the work area, away from the circle, to cancel the selection of the circle.



Click on the bug to select it.



**NOTE:** You can also cancel the selection of an object by clicking the arrow button in the Object Toolbar.

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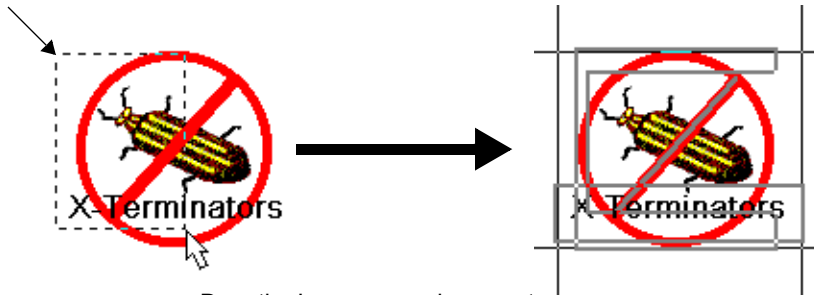
## Selecting a Group of Objects

Several objects can be selected together to allow you to move, copy, or delete them as a group.

Select a group of objects by holding the **SHIFT** key down and clicking on each object.

A group can also be selected by clicking and dragging to place a lasso on or around the desired objects. Any objects within or touching the borders of the lasso will be selected.

Start the Lasso outside of any objects on your form.



Drag the Lasso around any part of an object to include it in the group.

To select all of the objects in your form, open the **Edit** menu and choose **Select All**.

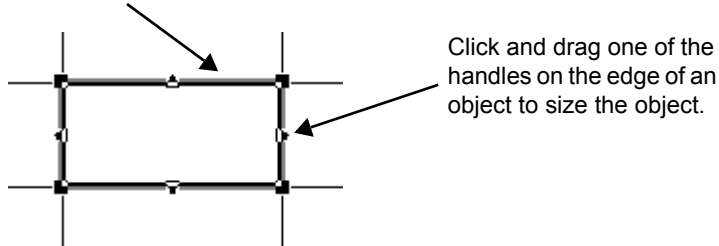
To cancel the selection of an object from a group, hold down the **SHIFT** key and click on it.

---

## Moving and Sizing Objects

A selected object is framed by a box with small rectangles in the corners and triangles on the sides. These small rectangles and triangles are the “handles” that allow you to resize the object. Clicking on a selected object and holding the mouse button down allows you to move or size the object.

Click and drag the edge of an object to move the object.



Click and drag one of the handles on the edge of an object to size the object.

The shape of the cursor indicates whether clicking and dragging will move or size the object.

- Crossed arrows appear below the cursor to allow you to move an object when you click on the edge of the object.
- A double-headed arrow appears to allow you to change the size of an object when you click on the object’s handle.

To delete an object from the form, select the object, and then press the DELETE key.



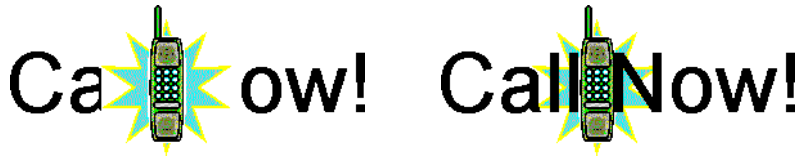
---

## Changing the Object Stacking Order

As you move objects in the design, they might overlap each other. You can move overlapped objects in front or in back of other objects to change how the objects display and print.

1. Click the object to select it.
2. Open the **Format** menu and choose a **Placement** option to change the object's position:
  - To move the object one level closer, choose **Placement > Bring Forward**.
  - To send the object one level deeper, choose **Placement > Send Back**.
  - To move the object to the top of the stack, choose **Placement > Bring to Front**.
  - To move the object to the bottom of the stack, choose **Placement > Send to Back**.

For example, if a picture is hiding a text box, you can change the stacking order so that the picture is behind the text. To do this, select the picture, and then open the **Format** menu and choose **Placement > Send to Back**.





# Aligning Objects

---

## Overview

DataBase give you three ways to align the objects on a form:

- Use the Grid to manually align objects along the grid lines (see [“Using the Grid” on page 148](#)).
- Use the Align dialog to align several objects relative to each other. For example, you could use the Align dialog to line up clipart with the top of your return address (see [“Using the Align Dialog” on page 149](#)).
- Use alignment boxes to “pack” your fields together so that blank fields don’t cause blank lines when you print (see [“Using an Alignment Box” on page 150](#)).

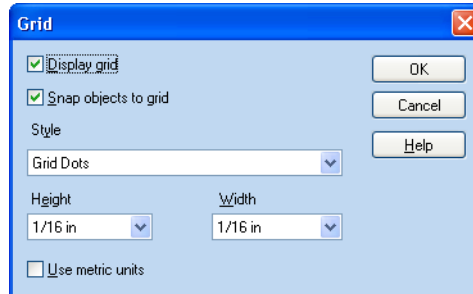
---

## Using the Grid

*If the objects on your design don't move smoothly, the **Snap objects to Grid** check box might be marked. Clear this check box to allow fine-tuning of object placement.*

You can display a grid to help you place objects on your form. Arrange the objects using the grid, or have DataBase automatically “snap” the objects to the nearest grid lines as you move them.

1. Open the **View** menu and choose **Grid** to open the Grid dialog.



2. Enter your grid settings:
  - Mark **Display Grid** if you want to display a grid on the form design. The grid doesn't print.
  - Mark **Snap to Grid** if you want the objects to “snap” to the nearest grid lines when you move them.
3. Choose a style for displaying the grid:
  - Choose **Grid Lines** to overlay grid lines on the design.
  - Choose **Grid Dots** to overlay dots at the intersection of each grid line.
4. Type or choose the grid spacing in the **Height** and **Width** boxes.

If you want to display the rulers and grid using centimeters instead of inches, mark the **Use Metric Units** check box.
5. Click **OK** to accept the settings.



**NOTE:** The grid is for display purposes only. It won't print.

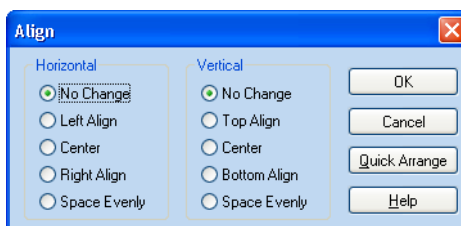
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## Using the Align Dialog

Use the Align dialog to arrange a group of objects on your form. The objects are aligned relative to one another. For example, if you choose the **Right Align** option, the right sides of objects are aligned with the right side of the right-most object.

1. Select the objects you want to align.
2. Open the **Format** menu and choose **Align** to open the Align dialog.  
If the menu item is dimmed, then no objects are selected.



3. Choose the options you want.

If some of the options are dimmed, you only have one object selected.

To align and group the selected fields towards the upper left-most field, click the **Quick Arrange** button.

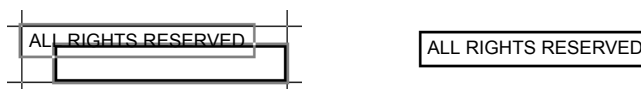
When you choose an option in the Align dialog, the selected objects move on your form to preview your choice. To view the preview, you might need to move the Align dialog by clicking and dragging the title bar of the dialog.

To restore your form to the way it looked before you opened the Align dialog, click **Cancel**.

4. Click **OK** to accept the changes.

If you're aligning text boxes or fields, make sure the text alignment matches the object alignment. For example, right align the text when you align the right sides of the text objects. To change the text alignment, see [“Aligning the Text in a Text Box or Data Field” on page 161](#).

For example, the text in the illustration below is already centered within the text box, but the text box isn't centered within the rectangle. The objects are selected and then aligned horizontally and vertically using the **Center** options.



---

## Using an Alignment Box

An alignment box allows you to align and arrange the text objects on your form, so that blank lines and spaces between text objects are eliminated when you print.

You can also select to proportionally shrink text to fit within the borders of an alignment box.

### To Add an Alignment Box

You can add an alignment box to a form in either the Output Forms window or the Edit Data Entry Form window. To open the Edit Data Entry Form window, click the **Edit Data Entry Form** button in the Data Entry window.



Alignment Box

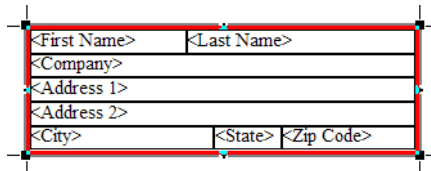
1. Open the **Insert** menu and choose **Alignment Box** or click the **Alignment Box** button in the Object Toolbar.

When you place the mailing address group on your form, the fields are grouped within an alignment box (see [“Adding a Mailing Address Group” on page 156](#)).

2. Click anywhere on the work area to place the alignment box.

You can also click and drag to add the fields and text boxes already on your form to the alignment box.

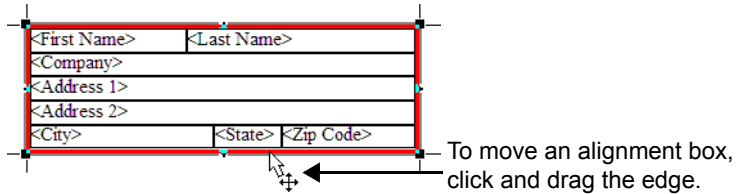
*A red border around an alignment box indicates that the fields in the alignment box are locked (see [“To Change the Properties of an Alignment Box” on page 152](#)).*



**NOTE:** The border around an alignment box appears on your screen, but doesn't print.

## To Move an Alignment Box

1. Position the cursor over the *border* of the alignment box. The cursor changes from the normal pointer to the move cursor shown below.



**NOTE:** If the cursor is over a field, you'll only move that field unless the alignment box is locked.

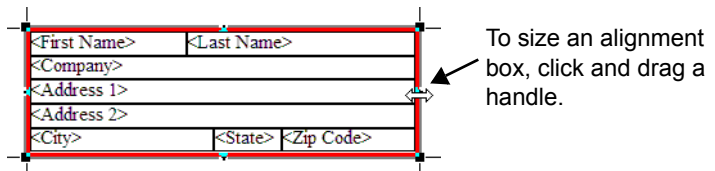
2. Click and drag the *border* of the alignment box to move it.
3. Click outside of the alignment box to cancel the selection of it.



**NOTE:** Dragging an alignment box over a field doesn't add the field to the alignment box. You must drag the field into the alignment box.

## To Resize an Alignment Box

1. Click on the *border* of the alignment box to select it.
2. Position the cursor over one of the alignment box's resizing handles. The cursor changes from the normal pointer to the resize cursor shown below.



3. Click and drag the handle to resize the alignment box.



**NOTE:** Changing the width of an alignment box automatically resizes the width of all of the fields within it. To keep the fields from resizing, hold down the SHIFT key as you resize the alignment box.

4. Click outside of the alignment box to cancel the selection.

*Only fields and text boxes can be placed in an alignment box. You can't place clipart, drawing objects, or barcode fields in an alignment box.*

## To Place Text Objects in an Alignment Box

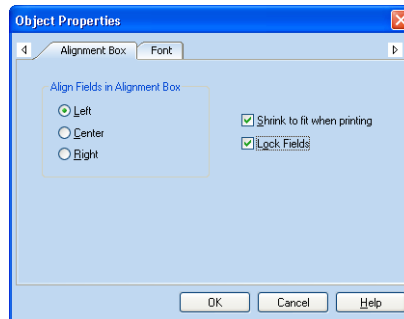
When you place an alignment box on a form, any fields or text boxes partially within its boundaries are automatically moved into the box. To place another object in an alignment box, or to move an object already in the box, click and drag it.

1. Click outside of the alignment box, so that it isn't selected.
2. Click and drag the field or text box into the alignment box. As you drag the object, the cursor changes to show whether the item will be placed between two rows or inserted into a row.

## To Change the Properties of an Alignment Box

The properties of the alignment box affect the properties of the fields and text boxes within it.

1. Click the border of the alignment box to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. In the **Alignment Box** tab, set the alignment for all of the fields and text in the alignment box.
  - To have DataBase reduce the font size if there is too much data to fit in the alignment box, mark the **Shrink to fit** check box.
  - To lock the fields in the alignment box, mark the **Lock Fields** check box.

*A red border around an alignment box indicates that the fields in the alignment box are locked.*



**NOTE:** When the fields are locked, they can't be moved or deleted. However, fields can be added to an alignment box when **Lock Fields** is marked in the Object Properties dialog.

- To set the font for all of the fields and text boxes within the alignment box, click the **Font** tab.
4. Click **OK**.



## To Delete an Alignment Box

1. If the alignment box contains fields or text boxes that you want to keep on the form, move the items out of the alignment box by clicking and dragging them.

You can't remove the fields from a locked alignment box. A red border around an alignment box indicates that the fields in the alignment box are locked (see [“To Change the Properties of an Alignment Box” on page 152](#)).

2. Click on the *border* of the alignment box to select it.
3. Press the DELETE key.



**CAUTION:** If the alignment box contains any fields or text boxes when you delete it, those fields and text boxes are removed from your form.

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# Adding Text to a Form

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## Overview

Regular users can only customize the forms in their **Personal Output Forms** list. The forms in the **Shared Output Forms** list and the Data Entry Form can only be customized by the database administrator.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

You can design your Data Entry form or your Output form the way you want it to look on screen and when it prints. Add text and graphics to your form using the Object Toolbar that is available in both the Edit Data Entry Form window and the Output Forms window.

Add fields for your data in the Edit Data Entry Form window, and then enter the data in these fields in the Data Entry window. Fields can be placed on your output forms to print your records on labels, envelopes, and other types of forms.

Add text directly on the form in both the Edit Data Entry Form window and the Output Forms window using text boxes. The text in a text box appears and prints the same with every record.

Change the font, size, and alignment of the text in fields and text boxes to create the look you want. You can even convert a field to appear and print as a barcode.

If you're creating a booklet, such as an address book, you can add headers and footers that print the same on each page.

---

## Adding Fields for Data

The **Field** list near the bottom of the Object Toolbar contains the names of the fields that you can add to your form. Each field has a descriptive name to help you identify the field when you're entering your data.

If you can't find a field that has a name to describe the kind of data you want to enter, the database administrator can create a new data field (see [“Customizing the Data Entry Form” on page 47](#)).



**NOTE:** The data fields are empty until you enter information in either the Data Entry or Data Table windows.

---

### Adding a Mailing Address Group

DataBase includes an easy way to add the most common address fields to your form. The Mailing Address group is placed on your form inside of an alignment box. The alignment box keeps the data fields in a group so they can be moved as a unit. It also suppresses extra blank lines and spaces when the forms are printed (see [“Using an Alignment Box” on page 150](#)).

#### To Add a Mailing Address Group

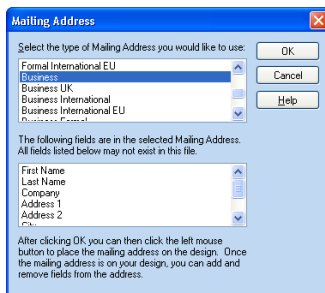
You can add a mailing address to your form using the Output Forms window or the Edit Data Entry Form window.



Mailing Address

1. Open the **Insert** menu and choose **Mailing Address**, or click the **Mailing** button in the Object Toolbar.

The Mailing Address dialog appears allowing you to choose a mailing group.



2. Choose an address type in the top box and view the field names in the selected address type in the bottom box.
3. After choosing the Mailing Address type, click **OK**.
4. Position the cursor over the form and click the mouse button.

## Choosing a Field From the Field List

1. Click the name of the field that you want in the Field list near the bottom of the Object Toolbar.
2. Position the cursor on the form and click the mouse button, or click and drag, to remove the field from the list and place it on the form.



**NOTE:** If the field you want isn't listed, it might be on the form already. Fields can only be in one place on a form. If you need to use a field more than once, type the field name into a text box (see [“Inserting a Field Into a Text Box” below](#)).

## Inserting a Field Into a Text Box

If you want to print data inside of a text box or use a field more than once on your form, insert the field name into a text box. This allows you to make personalized forms, such as adding a personalized line on an envelope.

1. Add a text box to your form, if it isn't there already (see [“Adding a Text Box” on page 159](#)).
2. Insert the cursor in the text box at the point where you want the field data to print.
3. Type two less-than signs (<<).
4. Type the field name exactly as it's shown in the Field list in the Object Toolbar.

It doesn't matter whether or not you use capital letters.

5. Type two greater-than signs (>>).

The text box should look something like this:

*Exclusively for <<First Name>> <<Last Name>>!*

When you print or preview the records, DataBase replaces the field names with the data from your records.

*Exclusively for Sarah Andrews!*



Product Barcode

## Adding a Barcode

DataBase supports POSTNET, Code 39, Codabar, Interleaved 2 of 5, Code 128, UPC-A, UPC-E, EAN-13, and EAN-8 barcodes.

- To add a product barcode to your form, open the **Insert** menu and choose **Product Barcode**, or click the **Product Barcode** button in the Object toolbar.
- To add a POSTNET barcode to your form, open the **Insert** menu and choose **Postal Barcode**.

You can also convert a field already on your form to a product barcode.

For more information about adding barcodes to your form, see [“Using Barcodes” on page 183](#).

---

## Deleting Fields

You can delete fields from a form you’re working with. The database administrator can also delete fields from the entire database file.

### Deleting a Field From a Form

Deleting a field from a form returns it to the **Field** list in the Object Toolbar. The field is only removed from the current form.

To delete a field from a form, click the field and then press DELETE to return the field to the **Field** list in the Object Toolbar.

For information about deleting a field from your database, see [“Deleting a Field From Your DataBase File” on page 56](#).

---

## Adding a Text Box

Text boxes are used to enter text that you want to include with every record, such as your company motto on a shipping label. If you want to add text that changes from record to record, add a field (see [“Adding Fields for Data” on page 156](#)).



Text

1. Open the **Insert** menu and choose **Text** or click the **Text** button in the Object Toolbar.
2. Position the cursor on the form and click the mouse button, or click and drag, to place a text box containing the text **Enter text here**.



3. Type your text in the box to automatically replace the original text.

To change the font of the text in the box, select the text box and then choose the font from the Properties Toolbar above the label. All of the text will change to the new font. You can only use one font, size, style, and color for each text box on your form.

---

## Adding a Return Address



Return Address

DataBase adds a return address to your form by inserting a text box when you click the **Return Address** button.

To place the return address text box on your form, open the **Insert** menu and choose **Return Address** or click the **Return Address** button in the Object Toolbar. Then, position the cursor on the form and click the mouse button, or click and drag, to add the return address to your form.

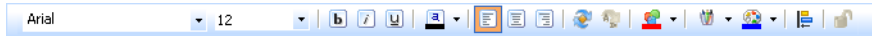
The first time you use the Return Address feature in each database file, you need to type your return address in the box. DataBase remembers this information and uses it the next time you click the **Return Address** button. If your return address changes, edit the text in the box. DataBase remembers the changes.

---

## Formatting Text in Fields and Text Boxes

You can format text using the buttons in the Properties Toolbar or the options in the Object Properties dialog.

To format the text using the Properties Toolbar, select the field or text box and then click a button in the toolbar.



In the Object Properties dialog, you can:

- Set the alignment of text within a field or text box
- Rotate fields and text on the form
- Choose your fonts and font color
- Insert product barcodes
- Set the field name placement

### ***To Use the Object Properties Dialog***

1. Click on the field or text box to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.
3. Click the tab at the top of the dialog for the property you want to change and choose the options that you want.
4. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

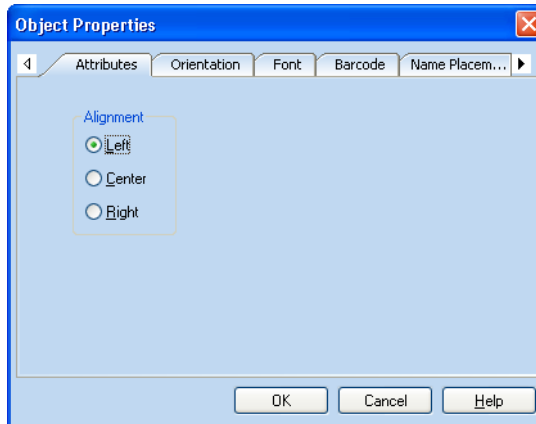
The different text formatting options are explained in detail in the following sections.



## Aligning the Text in a Text Box or Data Field

You can align text within the field or text box.

1. Click on the field or text box to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Click on the **Attributes** tab to set the alignment of text within the field or text box.
4. Choose the option you want.  
If the options are dimmed, the field or text box might be inside of an alignment box. To set the alignment of the text in the field or text box, set the alignment box properties (see [“To Change the Properties of an Alignment Box”](#) on page 152).
5. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

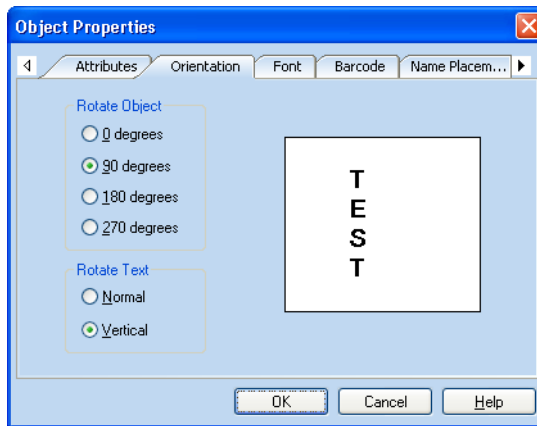
## Rotating the Text

You can rotate the fields and text objects on your form in 90-degree increments and align the letters vertically in a field.



**NOTE:** DataBase can't rotate fields that are within an alignment box.

1. Click on the field or text box to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Click on the **Orientation** tab.
4. Choose the options you want.  
The **Test** window shows you how the object will rotate.
5. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

You can also rotate objects and text by clicking the **Rotate Object** and **Rotate Text** buttons in the Output Forms window.

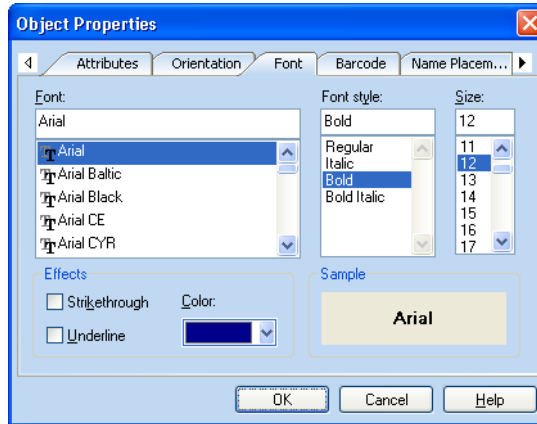
- To rotate an object, select the object and then click the **Rotate Object** button.
- To rotate the letters in a field, select the field and then click the **Rotate Text** button.



## Choosing the Font

When you choose a font for the text in a field or text box, the selected font applies to all of the text in the field or text box.

1. Click on the field or text box to select it.
2. Open the **Format** menu and choose **Font** to open the Object Properties dialog.



3. Click on the **Font** tab to choose the font for the text in the field or text box.

As you make choices, the **Sample** box shows how the text will appear on your form.

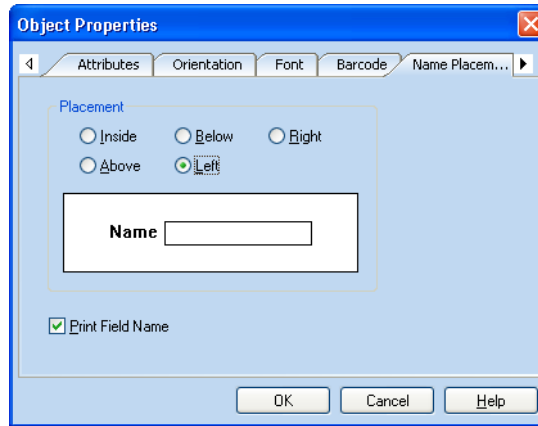
4. Scroll in the **Font** box and choose a font that you want to use for your text.
5. Choose a **Font style** and **Size** from the available options.
6. Choose the effects that you want to apply to your text.
  - Check the **Strikethrough** box to display the text with a horizontal line through the center of the text.
  - Check the **Underline** box to display underlined text.
  - Click in the **Color** box to open the color palette and choose a color for the text.
7. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

## Setting the Field Name Placement

In most of the pre-designed forms, the field names appear inside of the field box. You can change this so that field names appear outside of the field box.

To select a field in the Data Entry window, click the **Edit Data Entry Form** button. To select a field in the Output Forms window, click the **Output Forms** tab.

1. Click the field in the design window to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



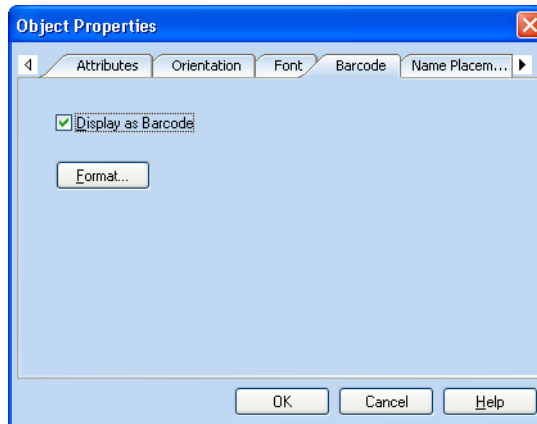
3. Click the **Name Placement** tab.
4. Choose the position for the field name.  
If the field name is placed outside of the field box and you want to print it as well as display it, check the **Print Field Name** box.
5. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

## Converting a Field to a Barcode

You can display and print a field as a product barcode. Convert a field to a product barcode in either the Edit Data Entry Form window or the Output Forms window.

1. Click on the field to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.

*DataBase supports Code 39, Codabar, Interleaved 2 of 5, Code 128, UPC-A, UPC-E, EAN-13, and EAN-8 product barcodes.*



3. Click the **Barcode** tab.
4. Mark the **Display as Barcode** check box.  
To choose the type of barcode to use, click the **Format** button (see [“Changing the Barcode Type and Specifications” on page 186](#)).
5. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

For more information about adding barcodes to your form, see [“Using Barcodes” on page 183](#).

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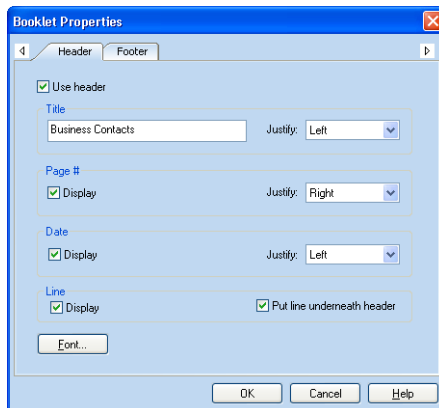
## Adding Headers and Footers to Booklets



Header/Footer

Use headers and footers to print the date, page numbers, or a title in your booklet. Headers and footers print on every page in the booklet.

1. Click the **Output Forms** tab.
2. Open the **Format** menu and choose **Header/Footer**, or click the **Header/Footer** button, to open the Booklet Properties dialog.



3. Check the **Use Header** box in the Header tab or the **Use Footer** box in the Footer tab and then choose the options you want.
  - Type the header title or footer title in the **Title** box.
  - Click the **Justify** drop-down arrow and then choose **Left**, **Center**, or **Right**.
  - You can choose to display a **Page #**, the **Date**, and a **Line** above or below the header or footer and then set the position of each.
  - To choose the font for the header or footer text, click the **Font** button.
4. When you finish designing the Header and Footer, click **OK**.

---

## Removing Blank Lines and Spaces

When you preview or print your forms, there might be blank lines or spaces for fields where there is no data. The data might also be too close together or too far apart, if the data in each field varies in length.

To add a single space between each field on the same line and remove blank lines when there is no data, place your fields in an alignment box.

For more information about alignment boxes, see [“Using an Alignment Box”](#) on page 150.

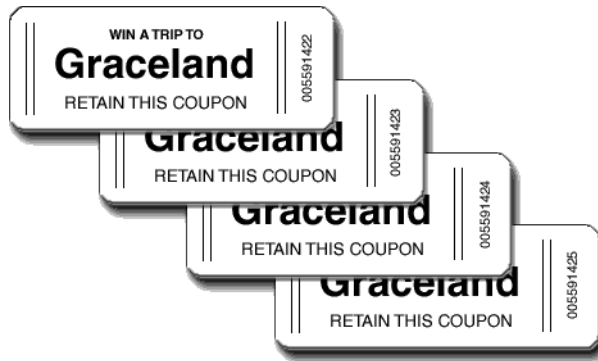
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## Sequencing Your Records

DataBase allows you to set up a field that will increment on your forms.

Select the field either the Data Entry or Data Table window so you can enter the information and increment the field (see [“Incrementing Fields” on page 86](#)).

For example, to make a set of numbered raffle tickets, place the field in the Output Forms window for the numbers, and then set the incrementing options in either the Data Entry or Data Table window.







# Adding Pictures and Drawing Objects

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## Overview

Regular users can only customize the forms in their **Personal Output Forms** list. The forms in the **Shared Output Forms** list and the Data Entry Form can only be customized by the database administrator.

The administrator doesn't have a **Personal Output Forms** list when using the **Administrator** login.

You can add background images, pictures, and drawing objects to your form either by importing clipart or using the built-in drawing tools. Use the clipart included with DataBase or import graphics from other programs to create a personalized form.

Any picture can be resized and arranged with other objects using the tools and options in DataBase. However, graphics can't be included in an alignment box.

Using DataBase you can include pictures and objects on your forms using the following methods.

- [Adding a Background Image \(see page 170\)](#)
- [Adding Clipart \(see page 172\)](#)
- [Drawing Lines \(see page 176\)](#)
- [Drawing Rectangles and Circles \(see page 177\)](#)
- [Changing the Attributes of Drawing Objects \(see page 179\)](#)
- [Adding Objects From Another Program \(see page 181\)](#)

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## Adding a Background Image

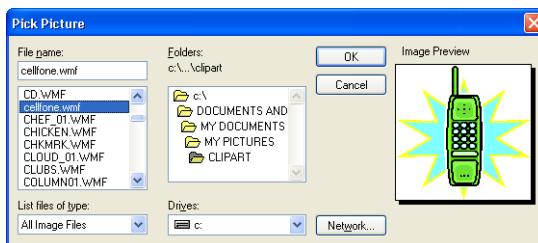
*DataBase can read BMP, GIF, PNG, RLE, DIB, TIF, PCX, DCX, WPG, JPG, IMG, TGA, WMF, and EPS graphic formats (LZW encoded TIF files aren't supported).*

You can add a background image to a form, center or fit the image to the form, and rotate the image on the form.

When you add a background image to a form, DataBase remembers the location of the image file, but doesn't actually add it to your DataBase file. This saves disk space, but DataBase won't be able to find the image file if it's moved or if you copy your file to another computer without also copying the image (see [“Transferring Files to Another Computer”](#) on page 289).

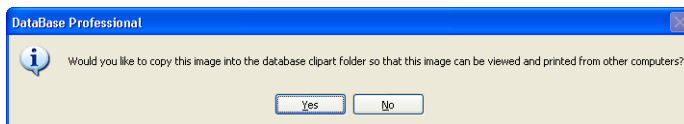
## Creating a Background Image

1. Open the **Insert** menu and choose **Create Background Image**, to open the Pick Picture dialog.



The Pick Picture dialog displays the Clipart folder that was installed with the program. You can find more clipart on the DataBase CD.

2. Choose the clipart file you want.  
A preview of the picture appears on the right side of the dialog.
3. Click **OK** to place the image as a background on your form.



4. Chose whether to save the clipart file in the database clipart folder.  
If you click **Yes**, a copy of the clipart file will be placed in the database clipart folder. The original file will remain unchanged.

## Placing the Image on the Form

The background image can be placed on the form in the following ways.

- **Fit Background Image to Form** fits the image to the form size.
- **Center Background Image** centers the image over the form.

After choosing the image you want, the image appears on the form.

- To resize the image to the shape of the form, open the **Insert** menu and choose **Fit Background Image to Form**.
- To center the image on the form, open the **Insert** menu and choose **Center Background Image**.

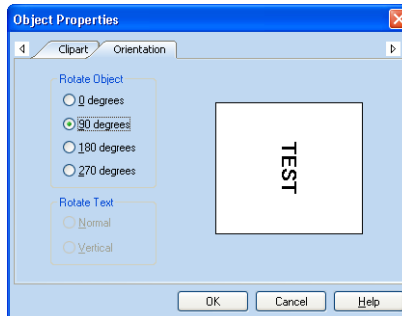
## Rotating the Background Image

You can rotate the image clockwise on the form using the Background Image Properties dialog.

You can rotate the background image in 90-degree increments.

1. Open the **Insert** menu and choose **Background Image Properties** to open the Object Properties dialog.

*The **Test** box shows you how the background will rotate.*



2. Click the **Orientation** tab.
3. Choose the amount of rotation.
4. Click **OK**.

## Replacing a Background Image

To choose a different image to replace the background image, open the **Insert** menu and choose **Replace Background Image** to display the Pick Picture dialog (see [“Creating a Background Image” on page 170](#)).

## Removing a Background Image

To remove a background image, open the **Insert** menu and choose **Remove Background Image**.

## Adding Clipart

*DataBase can read BMP, GIF, PNG, RLE, DIB, TIF, PCX, DCX, WPG, JPG, IMG, TGA, WMF, and EPS graphic formats (LZW encoded TIF files aren't supported).*



Clipart

*If you want to make the picture a specific size, you can click and drag when you place it.*

You can easily add clipart to your form. Clipart can be resized or rotated after you add it to your form.

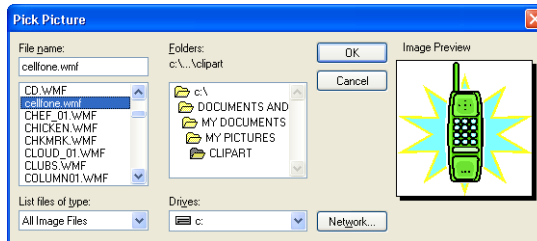
When you add clipart to a form, DataBase remembers the location of the clipart file, but doesn't actually add it to your DataBase file. This saves disk space, but DataBase won't be able to find the clipart file if it's moved or if you copy your file to another computer without also copying the clipart (see [“Transferring Files to Another Computer” on page 289](#)).

If you want to place images that change from record to record, see [“Placing an Image in a Field” on page 74](#).

### To Add Clipart to Your Form

You can add clipart to a form in the Output Forms window or the Edit Data Entry Form window. To open the Edit Data Entry Form window, click the **Edit Data Entry Form** button in the Data Entry window.

1. Open the **Insert** menu and choose **Clipart**, or click the **Clipart** button in the Object Toolbar, to open the Pick Picture dialog.

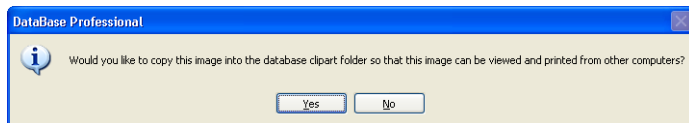


The Pick Picture dialog displays the Clipart folder that was installed with the program. You can find more clipart on the DataBase CD.

2. Choose the clipart file you want.

A preview of the picture appears on the right side of the dialog.

3. Click **OK**.



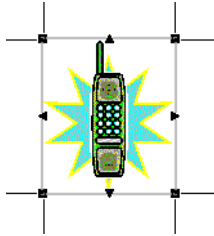
4. Chose whether to save the clipart file in the database clipart folder.

If you click **Yes**, a copy of the clipart file will be placed in the database clipart folder. The original file will remain unchanged.

5. Position the cursor on the form where you want the picture, and then click to place it.

## Moving and Sizing Clipart

To move a picture, click and drag it. To size a picture, click and drag a sizing handle.

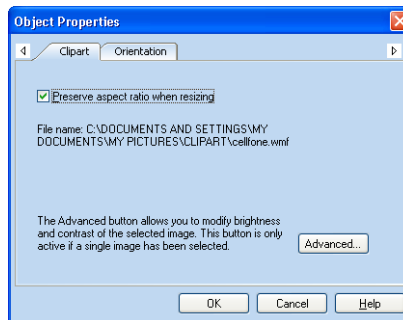


To size a picture proportionally (so it doesn't look squeezed or stretched), hold down the **SHIFT** key as you size the picture. This also restores a squeezed image to its original proportions.

You can set a picture to always size proportionally using the Object Properties dialog.

### *To Set a Picture to Size Proportionally*

1. Click the picture on your form to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.

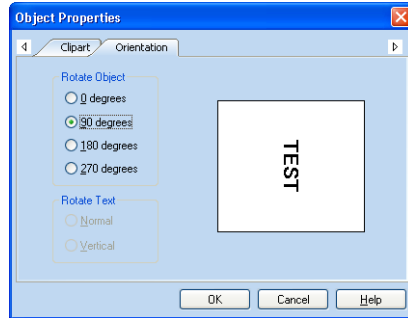


3. Click the **Clipart** tab.
4. Mark the **Preserve aspect ratio when resizing** check box.
5. Click **OK**.

## Rotating Clipart

You can rotate clipart in 90-degree increments.

1. Click the picture on your form to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Click the **Orientation** tab.
4. Choose the amount of rotation.

The **Test** box shows you how the clipart will rotate.

5. Click **OK**.

You can also rotate the clipart by clicking the **Rotate** button in the Properties toolbar.



Rotate

## Adjusting the Brightness of Clipart

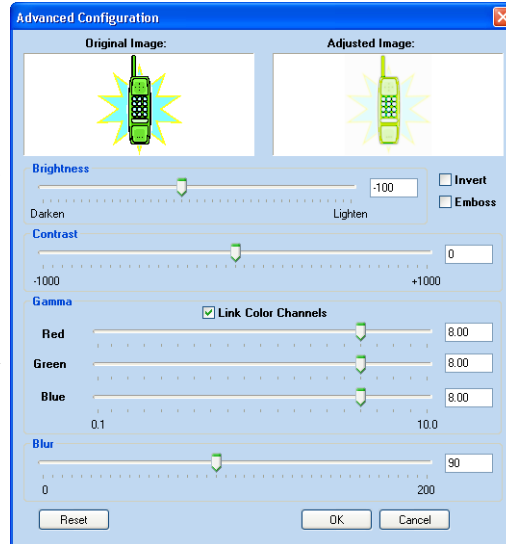
1. Click the picture on your form to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.
3. Click the **Clipart** tab.
4. Click the **Advanced** button to open the Advanced Configuration dialog.

**Brightness** adjusts the lightness and darkness of the entire picture.

**Contrast** adjusts the lightness and darkness at the lightest and darkest extremes of the colors in the picture.

**Gamma** adjusts the lightness and darkness of the mid-range spectrum of the colors in the picture.

**Blur** softens the edges of the picture.



5. Drag the sliders for **Brightness**, **Contrast**, **Gamma**, and **Blur** or enter values in the boxes on the right.

The **Original Image** always stays the same, and the **Adjusted Image** shows you how the image will look with the adjustments you make.

6. Choose **Invert** and **Emboss** effects by checking the box next to the effect you want.
  - **Invert** swaps the colors of the picture, much like a photographic negative.
  - **Emboss** create a three-dimensional effect on a gray background.

To return the settings to the original positions, click the **Reset** button.

7. Click **OK** to apply your changes.
8. Click **OK** to close the Clipart Properties dialog.

DataBase remembers the adjustments that you made and applies the adjustments each time you open the file that contains an adjusted picture. For images in fields, all of the images in each record are adjusted based on the selections you made.

*The clipart in the original file remains unchanged after you make adjustments.*

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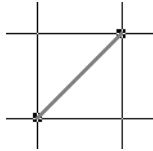
## Drawing Lines

You can add lines of any length or angle to your form.

1. Open the **Insert** menu and choose **Line** or click the **Line** button in the Object Toolbar.
2. Click on the form where you want to position the line.  
To determine the length and angle of the line, click and drag when you place it.

### Moving and Sizing a Line

To reposition the line on your form, click the middle of the line and drag it. You can resize or change the angle of the line by clicking and dragging one of the handles on either end.



### Changing the Thickness and Color of a Line

The thickness and color of a line can be easily changed using Properties toolbar.



Line Thickness



Line Color

- To change the thickness of a line, click the **Line Thickness** button and choose from the list.
- To change the color of a line, click the **Line Color** button and choose from the color palette.

You can also change the attributes of a line in the Object Properties dialog (see [“Changing the Outline of a Rectangle or Circle” on page 178](#)).



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## Drawing Rectangles and Circles



Circle



Rectangle



Rounded Rectangle

You can add circles, rectangles, and rounded rectangles to your form. You can even place a border near the edge of your form.

1. Open the **Insert** menu and choose a shape or click one of the shape buttons on the Object Toolbar.
  - To place a circle or ellipse on your form, open the **Insert** menu and choose **Circle** or click the **Circle** button.
  - To place a rectangle on your form, open the **Insert** menu and choose **Rectangle** or click the **Rectangle** button.
  - To place a rectangle with rounded corners on your form, open the **Insert** menu and choose **Rounded Rectangle** or click the **Rounded Rectangle** button.
2. Click on the form where you want to position the shape.  
To define the size of the shape, click and drag when you place it.

### ***To Place a Border Around the Edge of Your Form***

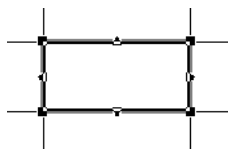
1. Open the **Insert** menu and choose a shape or click one of the shape buttons on the Object Toolbar.
2. Click on the form to place the shape.
3. Right-click the shape and choose **Border** from the shortcut menu.

The shape is sized and placed near the edges of your form to create a border.

If you're using a sheet feed printer, the border helps define the printable region of the form for you.

### **Moving and Sizing a Rectangle or Circle**

To reposition a shape on your form, click and drag the edge of the shape. You can size the shape by clicking and dragging one of the handles on a side or corner.



Change a rectangle to a square, or an ellipse to a circle, by holding the **SHIFT** key down while dragging a handle.

## Changing the Outline of a Rectangle or Circle

The thickness and color of the outline of a shape can be easily changed using Properties toolbar.



Line Thickness



Line Color

- To change the thickness of the outline, click the **Line Thickness** button and choose from the list.
- To change the color of the outline, click the **Line Color** button and choose from the color palette.

You can also change the attributes of the outline in the Object Properties dialog (see [“Changing the Attributes of Drawing Objects” on page 179](#)).

## Changing the Fill Color of a Rectangle or Circle

You can easily change the color of the inside of a shape using the Properties toolbar.



Fill Color

- To change the color of the inside of a circle or rectangle, click the **Fill Color** button and choose from the color palette.
- To make the inside of a circle or shape transparent, click the **Fill Color** button and choose **None** from the color palette.

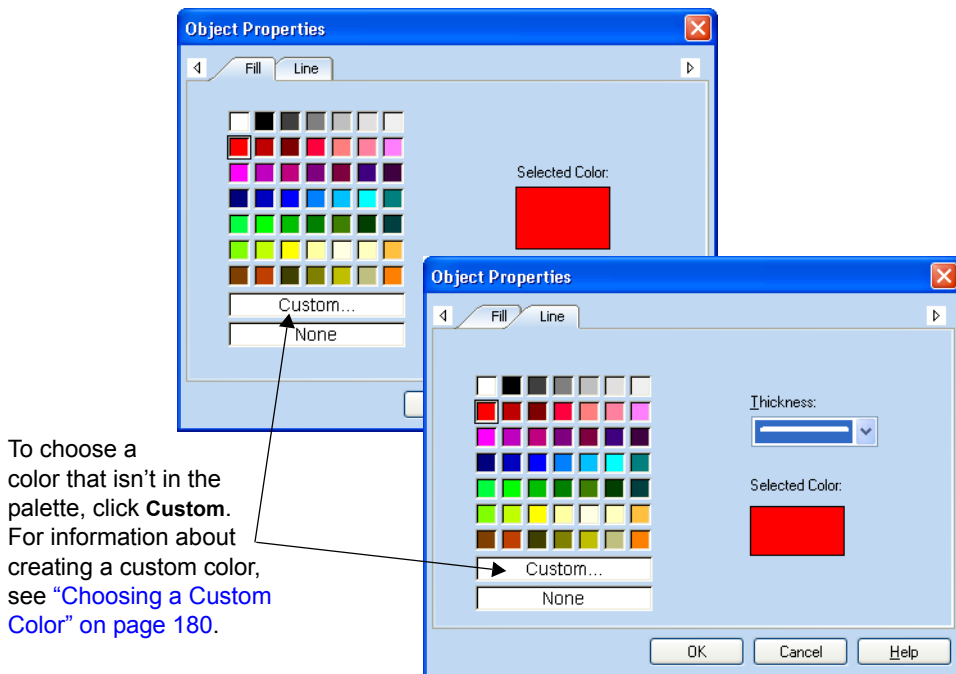
You can also change the fill color of a shape in the Object Properties dialog.

---

## Changing the Attributes of Drawing Objects

In addition to using the Properties Toolbar for changing the attributes of a drawing object, you can use the Object Properties dialog.

1. Click the drawing object on your form to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Choose the attribute you want to change.
  - If you want to change the thickness or color of a line or the outline of a shape, click the **Line** tab.
  - If you want to change the color of the inside of a shape, click the **Fill** tab.
4. Choose the color from the palette or click **Custom** to create a custom color.
5. A preview of the color appears in the dialog.

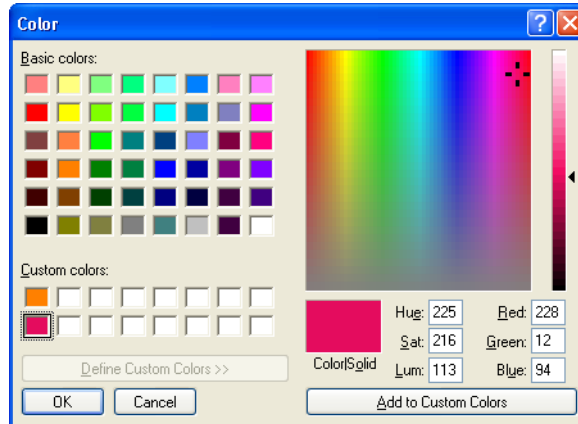
To make the inside of a shape transparent, choose **None**.
6. Choose the thickness of the line or outline, if you're in the **Line** tab.
7. Click **OK**.

## Choosing a Custom Color

There are 48 colors available on the color palette in the Object Properties dialog.

If you want to create a custom color for the selected object, click **Custom** in the color palette.

The Color dialog displays a wide range of colors.



1. Click an empty **Custom colors** box, and then click in the large box on the right to select the color.
2. Click anywhere in the bar on the far right.  
A preview of the color appears in the small box below it.
3. Drag the arrow next to the saturation control scroll bar on the right to adjust the color level.

You can change this color by clicking somewhere else in the large box and dragging the saturation control, or entering numbers in the boxes on the lower-right.



**NOTE:** The values in the boxes must be less than 256.

If you want to save the custom color, click **Add to Custom Colors**. When you're satisfied with your color selection, click **OK**.

---

## Adding Objects From Another Program

DataBase is compatible with the Windows feature known as Object Linking and Embedding, or OLE. With this feature, you can use objects created in other programs for your forms, or use another program to create objects within DataBase.

For example, you can create a company logo in a drawing program, place it on your form, and then edit the logo at any time from DataBase using the tools of the original drawing program.

You can also insert OLE text objects, allowing you to use the tools of your word processing program within DataBase.

### Comparing Linking with Embedding

The basic difference between linking and embedding is where the OLE object is stored. Linking and embedding have different advantages.

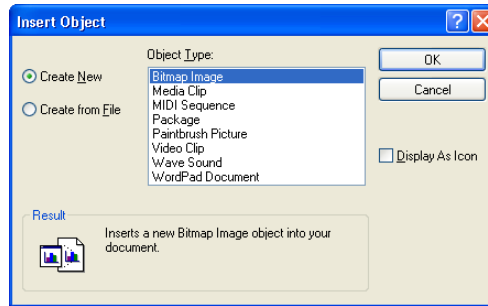
When you *embed* an object with OLE, you insert a *copy* of the object into your DataBase file. Editing the object within DataBase doesn't affect the original file. If you plan to transfer your list to another computer, you might want to embed your object to simplify the transfer process (see [“Transferring Files to Another Computer” on page 289](#)).

When you *link* an object with OLE, you insert a *reference* or *pointer* to the object which allows DataBase to find the object in the program that created it and insert the object onto your form. Unlike pasting or embedding, you aren't actually making a copy of the object, so there is only one copy of the object on your computer. This means that you can edit the object one time and have the changes appear everywhere the object is linked.

For example, if you have created a logo with a drawing program and linked it to both your mailing labels and to your letterhead in a word processing program, you can update the logo in the drawing program and have the changes appear automatically the next time you open DataBase or the word processor file.

## Inserting an OLE Object

1. Open the **Insert** menu and choose **Object** to open the Insert Object dialog.



2. Choose the object that you want to insert.
  - If you want to create a new object, choose the **Create New** option and then choose the type of object from the **Object Type** list. The object will be embedded in your DataBase file.
  - If you want to insert an object that you've already created and saved using another program, choose the **Create from File** option and then locate the file on your computer. The object will be embedded in your DataBase file unless you mark the **Link** check box.
3. Click **OK**.
4. Click on your form to place the object for editing.

## Editing an OLE Object

Depending on the program used to create an OLE object, double-clicking an OLE object opens the program in which it was created. For certain programs, however, some of the DataBase menus and toolbars are temporarily replaced by those of the original program.

### To Edit an OLE Object

1. Double-click the OLE object.
2. Edit the object.
3. Do one of the following:
  - If you're editing the object in a separate program window, open the **File** menu and choose either **Exit** or **Quit** to return to DataBase.
  - If you're editing the object in a program that temporarily replaces the DataBase menus and toolbar, click anywhere outside of the OLE object to return to DataBase.

*Some OLE objects, such as sound or video clips, play when you double-click them. To edit one of these objects, open the **Edit** menu and choose **Object**.*

# Using Barcodes

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## Overview

A postal or product barcode can be added to your form by clicking one of the two barcode buttons located in the Object Toolbar. The barcode is associated with a data field that you place on your form.

DataBase supports POSTNET, Code 39, Codabar, Interleaved 2 of 5, Code 128, UPC-A, UPC-E, EAN-13, and EAN-8 barcodes.

The POSTNET barcode was developed by the USPS to encode ZIP Code information about mail pieces, so that they can be read by barcode sorting machines. A POSTNET barcode will only print on records that have a ZIP+4 Code.

Since DataBase doesn't perform the complicated sorting required for Bulk Mail, adding a postal barcode to your form doesn't qualify your mailing pieces for automated postage discounts. For information about how you can receive Bulk Mail discounts, contact the USPS or go to <http://www.mypostageratesaver.com>.

Add a barcode to your form in the Design window and enter the data for the barcode in the Data Entry or Data Table window.

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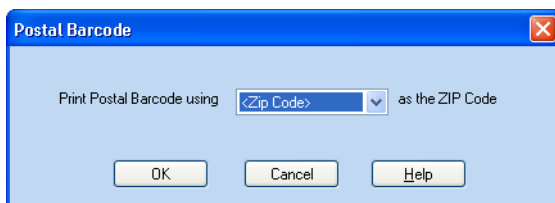
## Adding a Postal Barcode

Postal barcodes turn ZIP+4 Codes into barcodes. DataBase only prints barcodes for addresses that have ZIP+4 Codes. Add the ZIP Code information in either the Data Entry or Data Table window.



**NOTE:** The form must be at least 3½ inches wide, to prevent the barcode from being cut off when you print.

- 
1. Open the **Insert** menu and choose **Postal Barcode** to open the Postal Barcode dialog.



2. Choose the ZIP Code field that you want barcoded.
3. Click **OK**.
4. Click on the form to place the barcode.

The United States Postal Service recommends that you place the barcode directly above the first line (recipient's name) of the address.



**NOTE:** You won't receive postage discounts for using barcodes on your forms unless you meet the strict address correction and Presort requirements for Bulk Mail. If you want to receive Bulk Mail discounts, you might want to purchase MySoftware's MyMailList Deluxe or MyPostageRateSaver.



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## Adding a Product Barcode

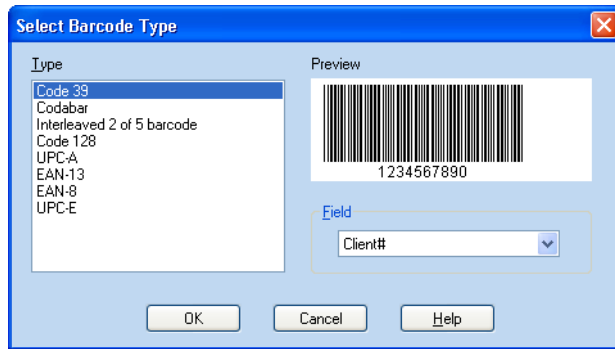
Product barcodes are placed as fields on your form in the Output Forms or Edit Data Entry Form windows. Enter the barcode data in either the Data Entry or Data Table window.



Product Barcode

### **To Add a Product Barcode**

1. Open the **Insert** menu and choose **Product Barcode**, or click the **Product Barcode** button to open the Select Barcode Type dialog.



2. Choose the type of barcode that you want on your form.
3. Choose the field that you want barcoded.
4. Click **OK**.
5. Click on the form to place the barcode.

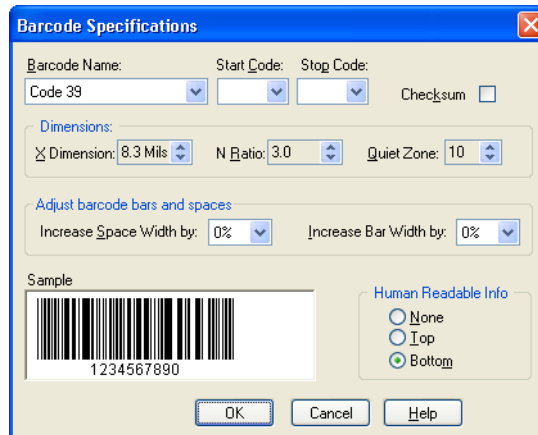
To further define how the barcode works, see [“Changing the Barcode Type and Specifications” on page 186](#).

Enter the data for the barcode in either the Data Entry or Data Table window.

## Changing the Barcode Type and Specifications

After you've placed a barcode field on your form (see [“Adding a Product Barcode” on page 185](#)), you can change the barcode type and specifications.

1. Click the barcode field on your form to select it.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.
3. Click the **Barcode** tab.
4. Mark the **Display as Barcode** check box, if it isn't already marked.
5. Click the **Format** button to open the Barcode Specifications dialog.



6. Choose the type of barcode you want to use from the **Barcode Name** drop-down list.

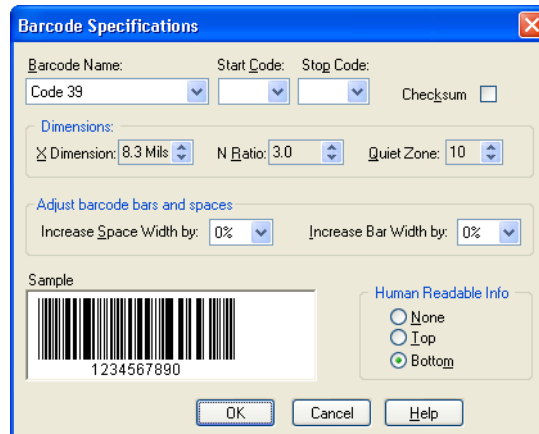
The type of barcode you choose affects what options are available in the Barcode Specifications dialog. To learn more about the features and specifications in this dialog, see [“Barcode Options” on page 187](#).

For complete information about what specifications to use, see the documentation for your barcode reader.

7. Click **OK** to close the Barcode Specifications dialog.
8. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

## Barcode Options

The Barcode Specifications dialog allows you to specify and customize a barcode.

The image shows a 'Barcode Specifications' dialog box with a blue title bar and a close button. It contains several sections: 'Barcode Name' with a dropdown menu set to 'Code 39'; 'Start Code' and 'Stop Code' with empty dropdown menus; a 'Checksum' checkbox which is unchecked; a 'Dimensions' section with 'X Dimension' set to '8.3 Mils', 'N Ratio' set to '3.0', and 'Quiet Zone' set to '10'; an 'Adjust barcode bars and spaces' section with 'Increase Space Width by' and 'Increase Bar Width by' both set to '0%'; a 'Sample' section showing a barcode with the number '1234567890' below it; and a 'Human Readable Info' section with three radio buttons: 'None', 'Top', and 'Bottom', with 'Bottom' selected. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Select the barcode type from the **Barcode Name** drop-down list. DataBase supports Code 39, Codabar, Interleaved 2 of 5, Code 128, UPC-A, UPC-E, EAN-13, and EAN-8 barcodes in this dialog.

Select the **Start Code** from the drop-down list to define the starting point of your barcode, if your barcode type requires it. If no codes are listed, then no codes are available for the type of barcode you have selected.

Select the **Stop Code** from the drop-down list to define the stopping point of your barcode, if your barcode type requires it. If no codes are listed, then no codes are available for the type of barcode you have selected.

Mark the **Checksum** box to add a checksum to your barcode. Clear this box to leave the checksum out. If this feature is dimmed, then the barcode type you've selected doesn't support checksums.

Enter the width of the narrowest bar or space on your barcode in the **X Dimension** box. The measurement is entered in Mils (1 Mil = 0.010"). Changing the value in the **X Dimension** box changes the size of every bar and space in a proportional manner. The actual dimension printed might vary depending on your printer.

Enter the percentage of difference between the narrowest and widest bar or space on your barcode in the **N Ratio** box. The percentage you enter will be how much wider the widest bar or space is compared to the narrowest. The actual dimension printed might vary depending on your printer.

Enter the multiple for the width of the **Quiet Zone** that goes at the beginning and end of your barcode. The width of the quiet zone is computed by multiplying this number times the **X Dimension**. The number entered here must be 1.0 or larger.

Select a percentage from the **Increase space width by** drop-down list to increase the width of the spaces in your barcode. Changing the **X Dimension** and **N Ratio** lets you define how you would like the barcode to ideally print. However, due to the type of ink or label stock you're using, you might find that the ink bleeds to a certain degree. Compensate for ink bleed by selecting from this list or the **Increase bar width by** drop-down list.

Select a percentage from the **Increase bar width by** drop-down list to increase the width of the bars in your barcode. Changing the **X Dimension** and **N Ratio** lets you define how you would like the barcode to ideally print. However, due to the type of ink or label stock you're using, you might find that the ink bleeds to a certain degree. Compensate for ink bleed by selecting from this list or the **Increase bar width by** drop-down list.

Choose the location where the Human Readable Information (HRI) prints. The HRI is the text printed with the barcode to represent the encoded data.

- **None** prevents the HRI from printing.
- **Top** prints the HRI above the barcode.
- **Bottom** prints the HRI below the barcode.

For complete information about what specifications to use, see the documentation for your barcode reader.

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## Changing the Properties of a Product Barcode

In addition to the specifications used to define a product barcode, you can rotate it, change its color, or change the font of the Human Readable Information.

1. Click the barcode on your form to select it.
2. Open the **Format** menu and choose **Object Properties**.
3. Choose the options you want for the barcode.
  - To rotate the barcode, click the **Orientation** tab and choose an option. The **Test** box shows how the barcode will be rotated.
  - To change the color of the barcode or the font options of the Human Readable Information, click the **Font** tab and choose an option.
4. Click **OK**.



**CAUTION:** Changing the properties of a barcode might reduce its readability. For more information, see the documentation for your barcode reader.

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## Entering Barcode Data

You need to enter information into a barcode field in either the Data Entry or Data Table window. For information about adding a barcode to your form, see [“Using Barcodes” on page 183](#).

A barcode field works like other fields: the data can be different on each record. To make the barcode data the same in every record, enter the data in one record and then copy it to the other records. If the data is numeric, you can let DataBase do the work for you by setting the field to increment by zero (see [“Incrementing Fields” on page 86](#)).

If all of your output forms are going to have the exact same information in the barcode and in all of the data fields, you only need to enter the data for the barcode once. Then, you can select the number of copies of the form to print in the Print dialog (see [“Printing Output Forms” on page 193](#)).

### Entering Postal Barcode Data

A Postal barcode won't print if there are less than 9 numbers in the ZIP Code field. You can enter the ZIP+4 Code as nine consecutive digits (940254227) or place a hyphen after the fifth character (94025-4227).

Delivery Point codes are supported if you have imported a database that supports Delivery Point codes. You'll need to map the database field that contains the Delivery Point data to the **Delivery Point Field** in the DataBase file (see [“Importing Data From Other Programs” on page 63](#)).

The **Delivery Point Field** is a special, “hidden” data field. You can't place it on your form nor can you edit the contents of this field. DataBase automatically adds the two-digit Delivery Point data to the end of a nine-digit ZIP Code for each record, if the Delivery Point data was imported.



**NOTE:** You won't receive postage discounts for using barcodes on your forms unless you meet the strict address correction and Presort requirements for Bulk Mail. If you want to receive Bulk Mail discounts, you might want to purchase MySoftware's MyMailList Deluxe or MyPostageRateSaver. For information about Bulk Mail software, call MySoftware Customer Service at 1-800-325-0834 or go to <http://www.mypostageratesaver.com>.

---

## Entering Control Characters

If you're using control characters in your barcode, you must enclose the control characters in angle brackets (<>). For example, if you want to enter a carriage return in code set A of a Code 128 barcode, enter: <CR>.



**NOTE:** You can't print a less-than symbol (<) in your barcode. Non-control characters following this symbol will be considered invalid.

## Incrementing a Barcode

DataBase allows you to set up your barcode to serialize, or increment, from record to record. Place a barcode where you want it on your form design, and then select it for incrementing in either the Data Entry or Data Table window (see [“Incrementing Fields” on page 86](#)).

---

## Printing Barcodes

Barcodes print on your forms along with the rest of the objects and data. The data in the associated field for a barcode dictates how the barcode prints for each record.

## Printing Postal Barcodes

There are two requirements for printing postal barcodes:

- There must be a postal barcode on the form that appears in the Forms window (see [“Adding a Postal Barcode” on page 184](#)).
- A postal barcode won't print unless the address contains a ZIP+4 Code (nine digits). If the ZIP code only has 5 digits, the postal barcode won't print.

DataBase can only preview and print POSTNET Barcodes for records that have ZIP+4 Codes. Forms that have a Barcode will display a sample Barcode in the Data Entry window for all records. However, a ZIP+4 must exist in a record for the Postnet Barcode to preview and print.



**NOTE:** ZIP+4 Barcodes are not the same as Delivery Point Barcodes. ZIP+4 Barcodes have 52 bars, while Delivery point Barcodes have 62 bars. The additional 10 bars are generated from a Delivery Point field for Automated Bulk Mail. DataBase doesn't allow editing of the Delivery Point field. To learn more about Delivery Point Barcoding and Automated Bulk Mail, call MySoftware Customer Service at 1-800-325-0834 or go to <http://www.mypostageratesaver.com>.

# PRINT OR SEND DATA

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Printing Output Forms	193
Printing Envelopes	201
Printing the Data Table	205
Sending Email Messages	213
Creating Form Letters	235





# Printing Output Forms

---

## Overview

There are four ways to print your data:

- In the format displayed in the Output Forms window
- In the format displayed in the Data Entry window
- In the Data Table format
- In a report

If you only want to print certain records in your list, you can choose which records you want. Before you print, you can check to make sure the data will fit on your forms by checking for overflow. You can also view an on-screen preview of your data to make sure the data looks the way you want it to before you begin printing.

For information about printing your data in a report, see [“Reports” on page 239](#).

---

## Checking for Data Overflow

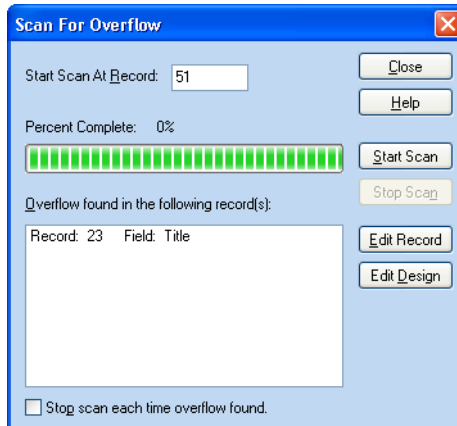
DataBase can check for data that will be cut off when you print your form. There are three reasons that data might be cut off:

- The data might extend past the edge of the form.
- The field might not be long enough to show all of its data.
- The alignment box containing the field isn't long enough, and the **Shrink to fit** check box isn't marked (see [“To Change the Properties of an Alignment Box” on page 152](#)).

Only the database administrator can change the size of a field or the properties of an alignment box on a shared form.

## To Scan for Data Overflow

1. Open the **Data** menu and choose **Scan for Overflow** to open the Scan For Overflow dialog.



2. Click in the **Start Scan At Record** box and type the record number where you want the scan to begin.

If DataBase finds a record that overflows, it lists the record number and field where the overflow occurs.

3. Click **Start Scan** to begin scanning your records.

To stop scanning records, click **Stop Scan**. When you click **Start Scan** again, the scan will start where it left off.

4. Choose to either edit the data or edit the form design.

- To edit the data in the record, click the record in the list and then click the **Edit Record** button to display that record in the Data Entry window.
- To edit the form design, click the record in the list and then click the **Edit Design** button to open the Output Forms window.

Only the database administrator can change the size of a field or the properties of an alignment box on a shared form.

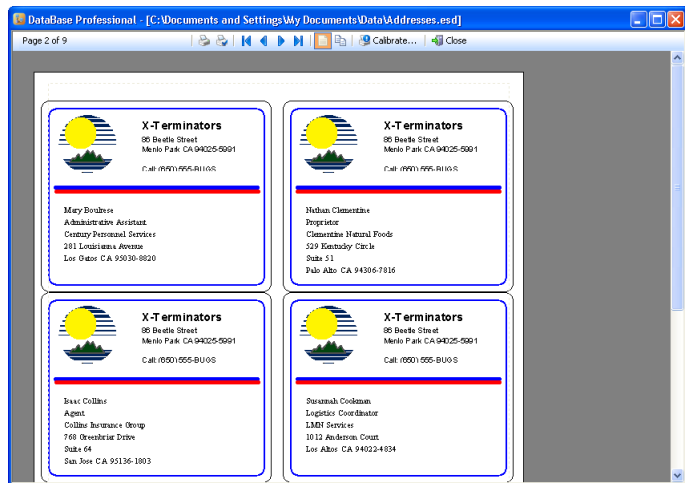


**NOTE:** DataBase only lists one field per record, even if there is overflow in other fields, so repeat the scan after you fix the known overflow problems.

## Previewing Your Form

Use the Print Preview feature to see how your data will look before you print.

1. Open the **File** menu and choose **Print Preview** and then choose one of the following options to open the Print Preview window:
  - **Data Entry Form** to preview the Data Entry Form design
  - **Active Output Form** to preview Output Form that is open in the Output Forms window.



2. Click to zoom in or out on the page:
  - To zoom in, click the page.
  - To zoom out, right-click the page.
3. Use the toolbar in the Preview window to scroll to different pages, set the view to one or two pages, check your printer settings, and begin printing.

If the preview looks correct, click the **Print** button on the left end of the toolbar to begin printing your list.

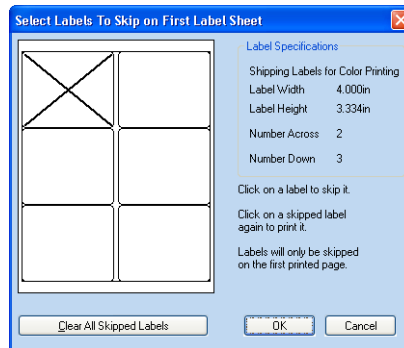
---

## Skipping Labels or Cards on the First Page

You can skip over the used areas on the first sheet of labels or cards if you're using a sheet-feed printer. This doesn't prevent any records from printing, it just prints the records in different locations on the page. For example, you might have printed three business cards on a sheet of ten cards. When you print more cards, you'll want to prevent DataBase from printing on the cards that are already used.

*To print your Data Entry Form, open the **File** menu and choose **Print > Data Entry Form**.*

1. Open the **File** menu and choose **Print > Active Output Form** to open the Print dialog.
2. Click the **Skip Labels** or **Skip Cards** button to open a dialog that displays a sample page of labels or cards.



3. Click on the areas you want to skip.  
Skipped areas are marked with an **X**. To remove an **X**, click the area again, or click the **Clear All Skipped Labels** or **Clear All Skipped Cards** button.
4. Click **OK** to return to the Print Setup dialog.



**CAUTION:** Running sheets of labels through a printer might cause labels to begin peeling off of the sheet. Don't run a sheet through the printer again if labels are missing, or it looks like labels are beginning to peel off.

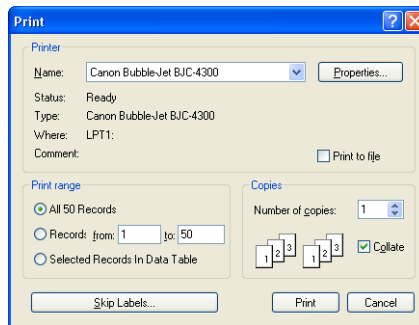
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---

## Printing the Forms

Print your records in the format of the form in the Data Entry window or the Active Output Forms window.

1. Open the **File** menu and choose **Print** and then choose one of the following options to open the Print dialog:
2. **Data Entry Form** prints the Data Entry Form design
3. **Active Output Form** prints the Output Form that is open in the Output Forms window



4. Make sure the correct printer is selected.
5. Select the records to print from the options in the **Print Range** box.
  - All records
  - Consecutive records
  - Only the records that are selected in the Data Table (see [“Selecting a Group of Records” on page 108](#)).
6. Enter the number of copies of each record you want to print.

The number you enter determines the number of forms to print for each record. For example, if you want to print a full sheet of 30 return address labels, enter 30.
7. If you’re making multiple copies of more than one record, set the **Collate** option.
  - Check the **Collate** box to print the entire set of records once, and then print the entire set again until the number of copies you entered have been printed.
  - Uncheck the **Collate** box to print the first record the number of times you entered in the **Copies** box, followed by the second record, etc.
8. Click **Print** to begin printing your records.

**NOTE:** You can’t collate copies if you have chosen to skip labels or cards on the first sheet.

---

## Using Sheet-Feed Labels

Sheet-feed labels are those designed for use in a laser or ink-jet printer. These printers have a non-printable area around the borders of the sheet. The printable region on a sheet of labels is indicated by a light gray, dotted line in the Preview window. The non-printable region extends about .125" to .5" all around the edge of the page; the width of the non-printable region varies from printer to printer.

To make sure all of the text and graphics on your label will fit in the printable region, you can place a border on your label. Any images or text placed within the border will be in the printable region. Add a border to your labels in the Output Forms window, and then move any objects that are outside of the border. The border can be deleted after the other objects are moved if you don't want it to print.

For information about adding a border to your label, see [“Drawing Rectangles and Circles” on page 177](#).

### Aligning Labels for Your Printer

The alignment of your data on the printed labels should be correct for most printers. However, if the standard settings don't work for your printer, you can easily change the way sheet-feed labels print by using the Print Calibrate feature.

Before you recalibrate the printer, you should check the alignment of the labels (see [“To Check the Alignment of the Printed Labels” on page 199](#)).



**NOTE:** If you're using a pin-feed printer, you must adjust the alignment manually. For more information, see [“Adjusting Form-Feed Printers” on page 200](#).

---

## ***To Check the Alignment of the Printed Labels***

Before calibrating your laser or ink-jet printer, you should make sure that your labels are being fed into the printer correctly. Slightly crooked sheets can make labels look misaligned.

You should also make sure that the specifications for the form size match the stock you're using:

1. View the Output Forms window by clicking the **Output Forms** tab.
2. Open the **Format** menu and choose **Change Form Size** to open the Change Form Size dialog with the current form size already selected.
3. Click the **Custom** button to open the Customize Size dialog, which shows you the exact specifications of the selected form size.

If the specifications don't match, you can try to find a size that does match, or make a new custom size.



**CAUTION:** If the label specifications don't match, you might be trying to print on photocopier labels, and not labels for laser or ink-jet printers. If this is the case, you should consider buying new labels. Photocopier labels aren't designed to withstand the heat or bending that occurs in printers, and might damage your printer.

---

## **Calibrating Sheet-Feed Printers**

If you're printing on sheet-feed labels (for laser or ink-jet printers), you can adjust the horizontal and vertical alignment of the printed labels.

1. Place a blank sheet of labels in your printer.
2. Open the **File** menu and choose **Print Preview > Active Output Form** to open the preview window.
3. Click the **Calibrate** button to open the Laser Print Alignment dialog.
4. Click the **Calibrate** button in the dialog to print two sets of grid lines on the page of labels.
5. Look at the vertical grid and find the number that crosses the bottom of the first row of labels. Enter this number in step 4 of the dialog.
6. Look at the horizontal grid and find the number that crosses the right edge of the first column of labels. Enter this number in step 5 of the dialog.
7. Click **OK** to save the new settings.

---

## Using Form-Feed Labels

When using a form-feed printer, be sure you're using the correct printer driver. Some printer drivers aren't designed for printing labels. If you encounter a problem with labels being skipped, it might be a problem with your printer driver. For information about getting the latest printer driver for your printer, see [“Updating Printer Drivers” on page 314](#).

### Adjusting Form-Feed Printers

If you're using a form-feed or dot-matrix printer, and your data isn't aligned properly, you must adjust the alignment manually.

If the data is crooked when it prints, make sure that the paper or other material has been loaded correctly.

To center the data on the printing stock, try this:

1. Turn off the printer.
2. Turn the printer's platen knob up or down to adjust the alignment.
3. Turn the printer back on.
4. Print a small number of records to test the new alignment.
5. Repeat steps 2-4 until the data prints correctly.

For more information about loading your printing stock and aligning your data, see your printer's documentation.



# Printing Envelopes

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## Overview

When you choose to print an envelope, DataBase attempts to determine your printer's envelope-feed orientation, so that the address information is placed correctly.

---

## Testing the Envelope Setup

Before you print your data, print a test envelope to make sure that the envelope feeds correctly, and that addresses print in the correct locations.

1. Click the **Output Forms** tab and choose a design from the **Envelopes** folder.
2. Open the **File** menu and choose **Print > Active Output Form** to open the Print dialog.
3. Set the **Print Range** to print only one record by entering the same record number in both the **From** box and the **To** box.
4. For example, **From 1 To 1**.
5. Place an envelope in your printer as directed by the printer's documentation.
6. Click **Print** to print a sample envelope.

After printing a test envelope, you can change DataBase's envelope-feed settings, or adjust the address locations as needed.

---

## Changing the Envelope Feed Settings

When you choose to print an envelope, DataBase attempts to determine your printer's envelope feed orientation so that the address information is placed correctly. If DataBase can't determine the correct settings, you'll have to specify the feed orientation yourself.

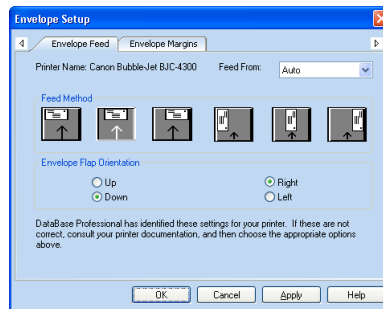


**IMPORTANT:** DataBase can only identify the envelope orientation that the printer expects. Changing the feed method and flap orientation options in the Envelope Setup dialog *won't* change how the printer actually prints.

---

### To Change the Envelope Feed Settings

1. Make sure an envelope form appears in the Output Forms window.
2. Open the **File** menu and choose **Print > Form** to open the Print dialog.
3. Click the **Envelope Setup** button to open the Envelope Setup dialog.



4. Make sure the correct printer appears in the **Printer Name** area.
5. Choose the location of your envelopes within the printer from the **Feed From** list.
6. Refer to your printer's documentation to see how envelopes should be fed into the printer.
7. Click an option in the **Feed Method** box to indicate the envelope's position in the printer's paper tray.
8. Choose an option from the **Envelope Flap Orientation** box to indicate the position of the envelope flap.
9. Click **OK** to keep the new settings and return to the Print dialog.

After adjusting the feed method, print another test envelope to see if further adjustments are needed (see [“Testing the Envelope Setup” on page 201](#)).

If the envelope feeds into the printer correctly, but you need to adjust the position of the addresses, you can change the envelope margins (see [“Adjusting the Envelope Margins” on page 203](#)).

*DataBase stores the feed method until you print an envelope on a different printer; choose a different paper size, or update your printer driver.*

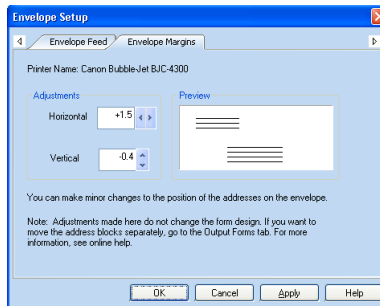
---

## Adjusting the Envelope Margins

You can make minor adjustments to the location of the return address and recipient's address by changing the envelope margins.

1. Make sure an envelope appears in the Output Forms window.
2. To choose an envelope, click the **Output Forms** tab and choose a design from the **Envelopes** folder.
3. Open the **File** menu and choose **Print > Active Output Form** to open the Print dialog.
4. Click the **Envelope Setup** button to open the Envelope Setup dialog.
5. Click the **Envelope Margins** tab.

*Adjusting the envelope margins won't change the form design.*



6. Enter a number in the **Horizontal** box or click the arrows to adjust the horizontal position of the addresses.
7. Enter a number in the **Vertical** box or click the arrows to adjust the vertical position of the addresses.

As you adjust the numbers, the **Preview** changes to show you where the addresses will print on the envelope.

8. Click **OK** to keep your changes and return to the Print dialog, or click **Apply** to keep your changes and make other changes to the envelope setup.

After adjusting the margins, print another test envelope to see if further changes are needed (see [“Testing the Envelope Setup” on page 201](#)).

DataBase stores the margin settings until you print an envelope on a different printer, choose a different paper size, or update your printer driver.



# Printing the Data Table

---

## Overview

To print your data in a table, print the Data Table. Before you print, you can format the data table to fit on a specific page size, and format the data so that it's easy to read.



**NOTE:** History and Notebox fields don't appear or print in the Data Table.

---

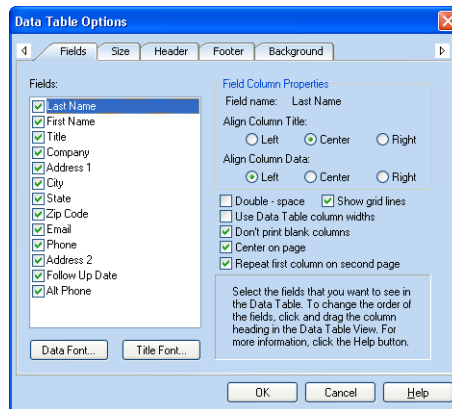
---

## Preparing the Data Table for Printing

Use the Data Table Options dialog to set the fields, fonts, printing options, margins, header, and footer for the Data Table.

If you want to change the width of columns or the height of the rows, see [“Changing the Format of the Data Table” on page 81](#).

1. Click the **Data Table** tab to open the Data Table window.
2. Open the **View** menu and choose **Change Data Table Options** to open the Data Table Options dialog.



3. Click the **Fields** tab at the top of the dialog to add or remove fields and define the printing options for fields (see [“Setting the Data Table Fields for Printing” on page 207](#)).
4. Click the **Size** tab at the top of the dialog to choose the page size you want to use (see [“Setting the Data Table Printing Size” on page 208](#)).
5. Click the **Header** tab or the **Footer** tab to set a header or a footer for the page (see [“Setting Headers and Footers for the Data Table” on page 209](#)).

The same header and footer prints on every page.

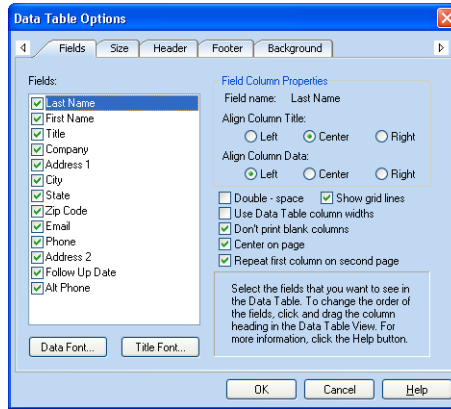
6. Click the **Background** tab to set the background colors for the rows in the Data Table (see [“Setting the Data Table Background Colors” on page 210](#)).

The background colors appear on-screen only; they don't print.

7. Click **OK** to accept your changes.

## Setting the Data Table Fields for Printing

1. Click the **Fields** tab at the top of the Data Table Options dialog.

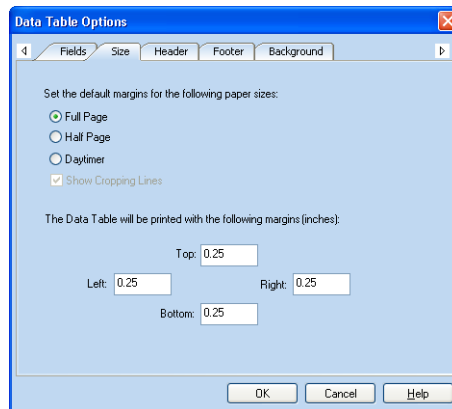


2. Add or remove a field from the Data Table by checking or unchecking the box next to the field's name.
3. Open the Font dialog for data fields or column headings:
  - To set the font for your data, click the **Data Font** button.
  - To set the font for the column headings, click the **Title Font** button.
4. Choose the font and font options in the Font dialog.
5. Click **OK** to return to the Data Table Options dialog.
6. Set the alignment of text within a column by clicking the field name and then choosing the alignment from **Field Column Properties**.

7. Choose printing options by checking or unchecking the boxes next to the options:
  - Check the **Double-space** box to print a blank line between each record.
  - Check the **Show grid lines** box to print a separator line between every third record in your list.
  - Check the **Use Data Table column widths** box to use the column widths that are displayed in the Data Table window.
  - Uncheck the **Use Data Table column widths** box to shrink or expand each column to fit the data in the field.
  - Check the **Don't print blank columns** box to skip any columns that don't contain data.
  - Check the **Center on page** box to center the printed data on the page. (Use this option for one-page printouts only.)
  - Check the **Repeat first column on second page** box to print the first column of data on both the first page and the second page. This might make the data easier to read after it's printed.
8. Click another tab to change more options or click **OK** to apply your changes and close the Data Table Options dialog.

## Setting the Data Table Printing Size

1. Click the **Size** tab at the top of the Data Table Options dialog.



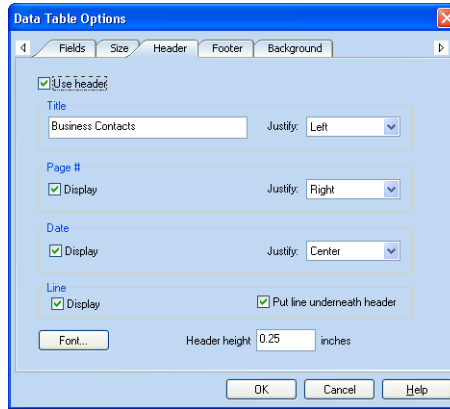
2. Choose the paper size you want.

If you chose **Half Page** or **Daytimer**, you can print lines to guide you when cutting the paper by checking the **Show Cropping Lines** box.
3. Enter the page margins for the paper size you selected.
4. Click another tab to change more options or click **OK** to apply your changes and close the Data Table Options dialog.



## Setting Headers and Footers for the Data Table

1. Click the **Background** tab at the top of the Data Table Options dialog.



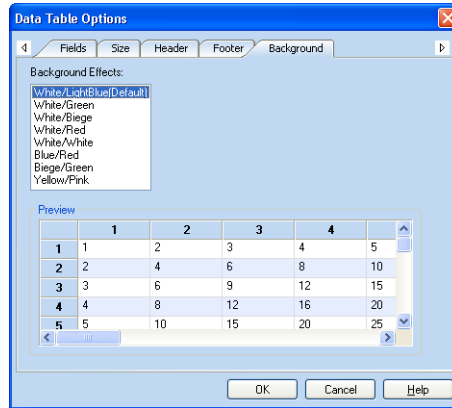
2. Check the **Use Header** box in the Header tab or the **Use Footer** box in the Footer tab.
3. Type the header title or footer title in the **Title** box.
4. Click the **Justify** drop-down arrow and then choose **Left**, **Center**, or **Right** to align the title text.

You can choose to display a **Page #** and the **Date**, and then set the position of each.
5. Click the **Font** button to choose the font for the header or footer text.
6. Check the **Display** box under **Line** to print a horizontal line in the header or footer.

The line prints above the header or footer text unless you check the **Put line underneath** box.
7. Enter the height of the header or footer to determine where the header or footer prints relative to the page size and margins.
8. Click another tab to change more options or click **OK** to apply your changes and close the Data Table Options dialog.

## Setting the Data Table Background Colors

1. Click the **Background** tab at the top of the Data Table Options dialog.



2. Choose the color setting you want from the **Background Effects** list.  
A preview of the color setting appears in the lower area of the dialog.
3. Click another tab to change more options or click **OK** to apply your changes and close the Data Table Options dialog.

---

## Previewing the Data Table

You can preview the Data Table before you print it.

1. Click the **Data Table** tab to open the Data Table.
2. Choose a page orientation for the preview:
  - To see how the data will print in portrait orientation, open the **File** menu and choose **Print Preview > Data Table > Portrait**.
  - To see how the data will print in landscape orientation, open the **File** menu and choose **Print Preview > Data Table > Landscape**.

After the Preview window opens, use the toolbar at the top of the window to move between pages and zoom in or out of the preview.

3. Click the **Print** button to print the Data Table from the preview window.

---

## Printing the Data Table

Print your list in a table by printing the Data Table.

1. Click the **Data Table** tab to view the Data Table.
2. Open the **File** menu and choose **Print > Data Table** to open the Print dialog.
3. Make sure the correct printer is selected.
4. Click the **Properties** button to open the Printer Properties dialog.
5. Choose either **Portrait** or **Landscape** orientation.

For information about setting the properties for your printer, see your printer's documentation.

6. Click **OK** to return to the Print dialog.
7. Choose the range of records that you want to print.
8. Set the number of copies.
9. Click **OK** to begin printing.



# Sending Email Messages

---

## Overview

The email editor in DataBase lets you create email messages, as well as a printed, professional-looking form letters. You can use HTML formatted email and include special fonts, colors, pictures, and hyperlinks, or use the Plain Text format, which removes some of the formatting, but can be more readable by more email-reading software. Form letters print as you see them on the screen.

---

## Writing Email Letters

Using the Email design window in DataBase, you can create an email text message and then send the message to the email addresses in your mailing list.

You can use either HTML or Plain Text format for this email message by choosing an option in the Format menu. Using HTML-formatted email preserves most of the formatting that you see in your message editor, and presents a more visually attractive message. Using Plain Text removes some of the formatting, but might be more readable by more email-reading software.

There are four basic steps for sending an email message using DataBase.

- [Step 1: Setting Email Preferences \(see page 214\)](#)
- [Step 2: Creating an Email Message \(see page 215\)](#)
- [Step 3: Previewing an Email Message \(see page 227\)](#)
- [Step 4: Sending Email Messages \(see page 227\)](#)

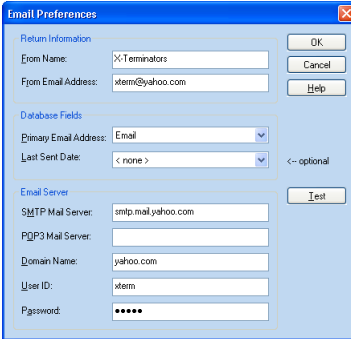
---

## Step 1: Setting Email Preferences

Before you can use DataBase to send email, you need to set the following email preferences.

- **Return Information** including your name and email address
- **Database Fields** specifying the email field name
- **Email Server** information

To set these preferences, open the **Email** menu and choose **Preferences**.



*When the recipient opens the email, the **From Name** and the **From Email Address** appear at the top of the email.*

1. Enter your name in the **From Name** box.
2. Enter your email address in the **From Email Address** box.
3. Click the **Primary Email Address** drop-down arrow and choose the field that contains the email address for each record in the data base.
4. If you created a field to keep track of the date when you send an email to someone, click the **Last Sent Date** drop-down arrow and choose the field.
5. Enter your SMTP mail server in the **SMTP Mail Server** box.
6. The following information might be optional depending on the requirements of your ISP.
  - Your **POP3 Mail Server**  
For most ISPs, you should leave **POP3 Mail Server** blank.
  - The email server **Domain Name**
  - The user **ID** and **Password** that you use to log into your email server

*Contact your Internet Service Provider (ISP) or your company's system administrator for the Email Server information.*



---

**NOTE:** If you use AOL or Hotmail for your email server, you might be able to enter your AOL or Hotmail email address in the Return Information but you can't use AOL or Hotmail to send email messages using DataBase.

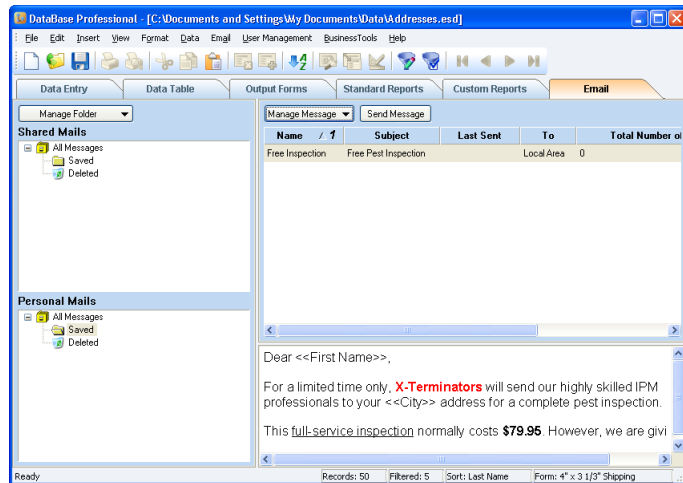
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## Step 2: Creating an Email Message

You can create an email message using the Email design window in DataBase. The email message is saved with the database file that is open when you create the email message. After creating an email message, you can modify the email message, rename the email message, and create copies of the email message.

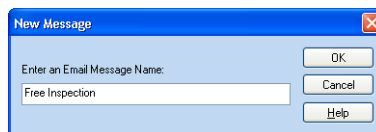
To display the Email design window, click the **Email** tab.



### Creating a New Email Message

1. Click the **Saved** folder in the **Personal Mails** list.
2. If you're logged in as the administrator, click the **Saved** folder in the **Shared Mail** list.
3. Click the **Manage Message** button and choose **New Message** to open the New Message dialog.
4. Enter a name for the message in **Enter an Email Message Name** box.

*It's a good idea to give the message a name that will help you identify the content of the message.*

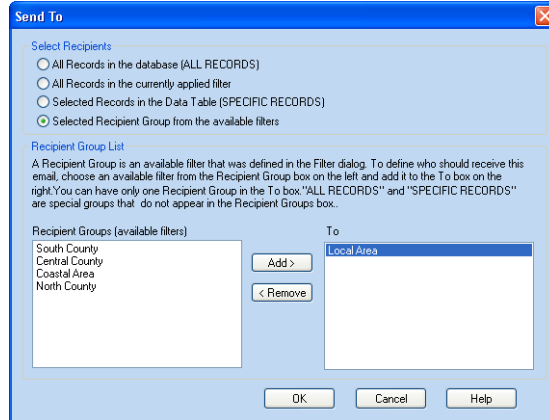


5. Click **OK** to close the **New Message** dialog.

The new Email Message Name appears in the Email Messages list and the Email Editor appears.

## Adding Recipients to an Email

1. Click the **To** button in the Email Editor to open the **Send To** dialog.



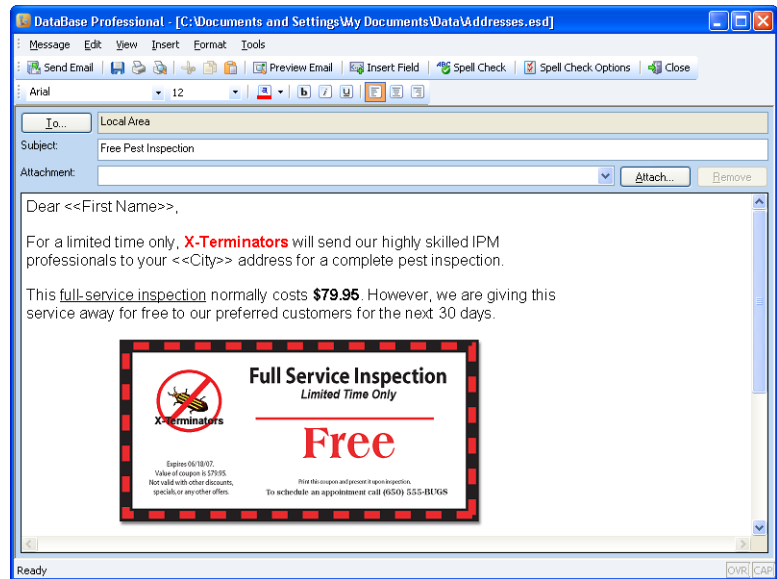
2. Choose one of the **Select Recipients** options.
  - **All Records in the Database** includes everyone in the current database.
  - **All Records in the currently applied filter** includes only those records selected by the current filter. For information about using Filters, see [“Filtering Records” on page 100](#).
  - **Selected Records in the Data Table** includes only those records currently selected from the data table. For more information, see [“Selecting a Group of Records” on page 108](#).
  - **Selected Recipient Group from available filters** allows you to specify your recipients from filters you have created. These appear in the **Recipient Groups** area of this dialog. For information about using Filters, see [“Filtering Records” on page 100](#).

To use available filters, select a filter in the **Recipient Groups** list and then click the **Add** button to move the filter to the **To** list.
3. Click **OK** to return to the Email Editor.



## Composing an Email Message

Enter the content of your message in the lower part of the Email Editor.



This is the body of the email message, where you can type text and insert fields (“[Inserting a Field in a Message](#)” on page 224), hyperlinks (“[Inserting a Hyperlink](#)” on page 225), and pictures (“[Adding Pictures to the Message](#)” on page 219).

After creating the message, open the **Message** menu and choose **Save** or click the **Save** button in the toolbar to save this message.

### ***To Choose the Format of the Message***

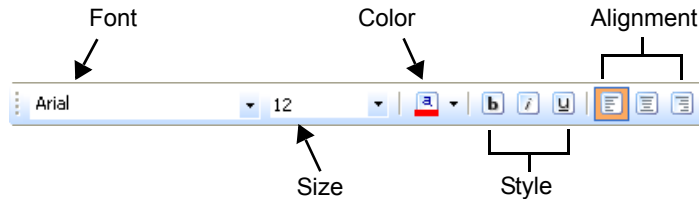
The email message can be composed as either **Plain Text** or **HTML** formatted.

- **Plain Text** formatted messages are sent as text only with no graphics or special effects and are less likely to get refused by some email services.
- **HTML** formatted messages can be made to look like a webpage with graphics, colors, and special text, but not all email services support HTML formatted messages.

To choose the format of the email message, open the **Format** menu and choose either **Plain Text** or **HTML**.

## Formatting the Message Text

When you choose the HTML format for the email message, you can include special fonts, colors, styles, and text alignment.



- **Font** selects the type of font to use. Click the drop-down list and choose from the list of fonts installed on your system.



**TIP:** Not all recipients will have the same fonts on their computers as you do. Try to use common fonts, such as Arial or Times New Roman when composing HTML-formatted email messages.

- **Size** selects the size of the font. Click the drop-down list and choose from the list of available sizes.
- **Color** changes the color of the text. Click the drop-down list to choose a color, or click **More Colors** to create a custom color.
- **Style** options change the style of the font. The **bold**, *italic*, and underline styles can be combined to create the desired look.
- **Alignment** options align the text to the left, center, or right.

### To Change the Text Format

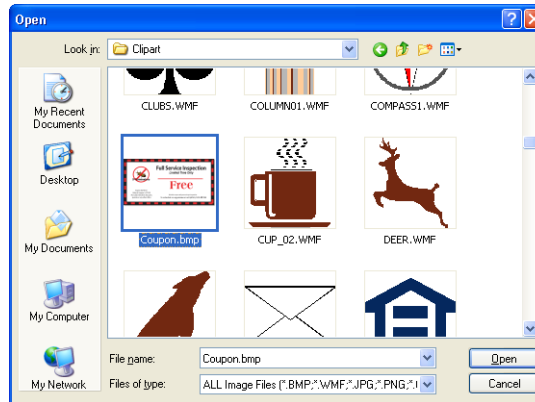
Select the text to want to change by clicking at the beginning of the text, holding the left mouse button down, and moving the mouse to select the desired text. While the text is selected, choose from the formatting options to see the text change.

If you want to enter new text with special formatting, select the type of formatting first before adding your new text.

## Adding Pictures to the Message

Pictures can be placed in-line with text, or aligned using the left, center, and right alignment buttons (see [“Formatting the Message Text” on page 218](#)).

To add a picture to a message, click where you want the picture in the message, and then open the **Insert** menu and choose **Picture** to display the Open dialog.



Locate the folder where the picture is saved, choose the file you want, and then click **Open**.

### **To Resize a Picture**

1. Click the picture to select it.
2. Place the cursor over one of the handles to change the cursor to the resize cursor (double-arrow).



← To resize the picture, click and drag the handle.

3. Click and drag the handle to resize the picture.

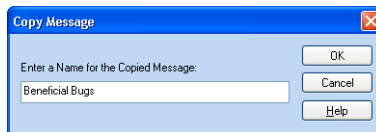
## Modifying an Email Message Name

After creating an email message, you can Copy, Rename, and Delete the message.

### *To Copy an Email Message*

You can create a new email message from an email message listed in the Email Messages list using the Copy Message dialog.

1. Click the email message name to select the message that you want to copy.
2. Click the **Manage Message** button and choose **Copy Message** to open the Copy Message dialog.

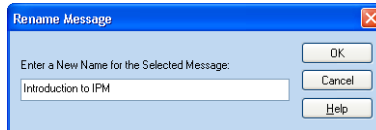


3. Enter a name for the message you're creating in the **Enter a Name for the Copied Message** box.
4. Click **OK**.

The original message name and the new message name appear in the **Email Messages** list.

## ***To Rename an Email Message***

1. Click the email message you want to rename in the Email Messages box.
2. Click the **Manage Message** button and choose **Rename Message** to open the Rename Message dialog.



3. Replace the email message name with the new name in the **Enter a New Name for the Selected Message** box.
4. Click **OK**.

The new message name appears in the **Email Messages** list and the original message name is removed from the list.

## ***To Delete an Email Message***

1. Click the email message listed in the **Email Messages** box.
2. Click the **Manage Message** button and choose **Delete Message** or press DELETE on your keyboard.

A warning dialog appears describing the email message you're going to delete and asks if you would like to continue.

3. Click **Yes**.

The email message name is removed from the **Email Messages** list.

## ***Editing an Email Message***

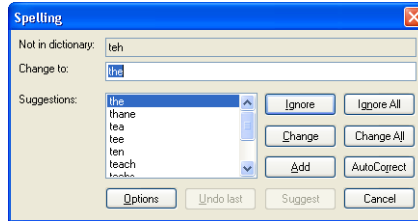
Choose the email message from the list, click the **Manage Message** button, and choose **Edit Message** to open the Email Editor. You can change the subject, attachments, body, and recipients of the message. For more information, see [“Composing an Email Message” on page 217](#).

To save the message, open the **Message** menu and choose **Save** or click the **Save** button in the toolbar.

## Checking Your Spelling

Click in the body of the message and then open the **Tools** menu and choose **Check Spelling** or click the **Spell Check** button.

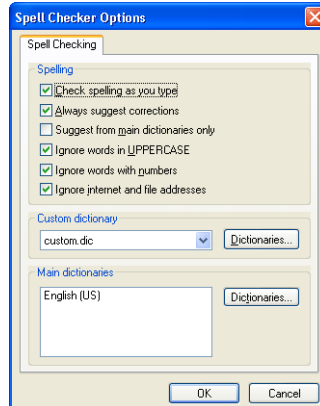
If the spell checker finds a misspelled word, the Spelling dialog appears.



- Click **Ignore** if you want the spell checker to ignore the misspelling of the selected word.
- Click **Ignore All** if you want the spell checker to ignore this spelling throughout the body of the email.
- Click a word in the **Suggestions** box and then click **Change** to change the selected word to the suggested word.
- Click a word in the **Suggestions** box and then click **Change All** to change this misspelled word throughout the body of the email.
- Click **Add** to add the word to the spell checker dictionary.
- Click **AutoCorrect** to automatically correct for this word.
- Click **Options** to open the Spell Checker Options dialog.

## To Set the Spell Checker Options

To set spell-checking options, open the **Tools** menu and choose **Spell Checker Options**, or click the **Spell Check Options** button to open the Spell Checker Options dialog.



- Select from the available **Spelling** options by checking the boxes next to the options you want to use.
- Click the **Dictionaries** button next to the **Custom dictionary** drop-down list to locate a Custom dictionary file.
- Click the **Dictionaries** button next to the **Main dictionary file** drop-down list to locate a dictionary file.

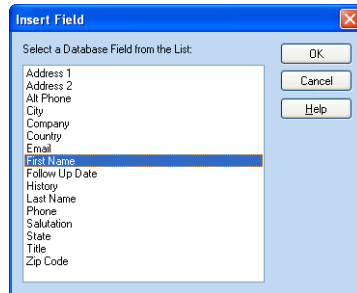
When you're finished setting the Spell Checker Options, click **OK**.

## Inserting a Field in a Message

You can insert fields in the subject line and the body of your email message. When you send the email message, the data in the field for each record appears in the message.

For example, you can personalize your message by inserting the first name field at the top of the body of the message. When the email is opened, the recipient's name appears at the top of the message.

1. Click in the subject line or the body of the message where you want the field placed.
2. Click the **Insert Field** button to open the Insert Field dialog.



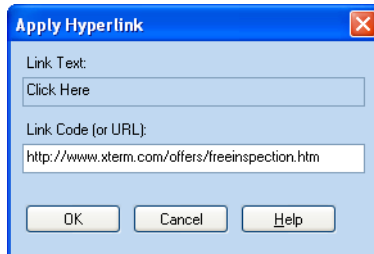
3. Choose a field name from the list.
4. Click **OK**.

Be sure that all the records in the mailing list contain data in the field that you choose. If a record doesn't contain data in the field, the email displays a blank space instead of information. For example, you can enter *Dear* and then choose the **First Name** field from the Insert Field dialog. When you send the email message, the records that don't have a first name in the *First Name* field will display empty space after the word *Dear*.



## Inserting a Hyperlink

1. Choose the location in the email message for the hyperlink.
2. Open the **Insert** menu and choose **Hyperlink** to open the Apply Hyperlink dialog.



If you highlight a word or some text before opening the Apply Hyperlink dialog, the text automatically appears as the **Link Text**.

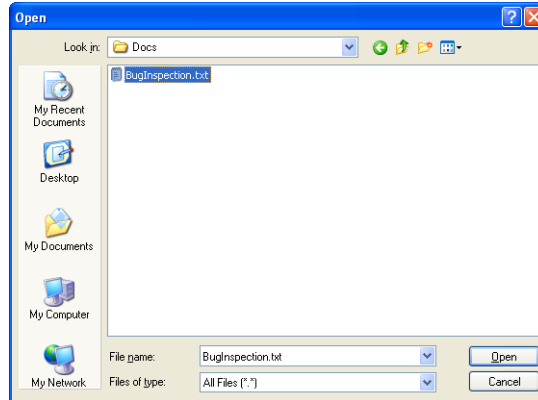
3. Type the text for the hyperlink in the **Link Text** box.
4. Type hyperlink location in the **Link Code (or URL)** box.
  - To link to a web page, start with `http://`
  - To link to an email address, start with `mailto:`
5. Click **OK** to add the link.

## Attaching Files to an Email Message

When you attach files to an email message, the files are sent to the recipients along with the message. The list of attached files is saved with the message.

### ***To Attach a File to a Message***

1. Click the email message in the **Email Messages** list.
2. Click the **Manage Message** button and choose **Edit Message** to open the email editor.
3. Click the **Attach** button to display the Open dialog.



4. Locate and open the folder where the file is saved.
5. Select the file you want to attach.
6. Click **Open** to add the file to the **Attachment** line.

### ***To Delete an Attachment***

1. Click the email message in the **Email Messages** list.
2. Click the **Manage Message** button and choose **Edit Message** to open the email editor.
3. Choose the file from the **Attachment** drop-down list.
4. Click **Remove** to remove the file.

### **Storing an Email Message**

The email messages listed in the Email tab are stored with the DataBase file. To save the messages, save the file before closing it.

---

## Step 3: Previewing an Email Message

You can preview an email message before sending it to email addresses in your records.

1. Click the email message in the **Email Messages** list.
2. Click the **Manage Message** button and choose **Edit Message** to open the email editor.
3. Open the **Message** menu and choose **Preview Email** or click the **Preview Email** button to display a preview of the email message using the data from the first selected record.

If there are no recipients for the message, the field names appear in the preview (see [“Adding Recipients to an Email” on page 216](#)).

4. When you’re finished previewing the message, click the **X** in the upper-right corner to close the message preview.

---

## Step 4: Sending Email Messages

When you want to send an email message that you have created in DataBase follow these steps.

1. Open the database that contains the message and the records of the recipients.
2. Choose the email message name in the Email window.
3. Select the records of the recipients you want (see [“Adding Recipients to an Email” on page 216](#)).
4. Click the **Send Email** button to send the message.

After sending the email message, an email confirmation summary report appears.

### When To Send an Email Message

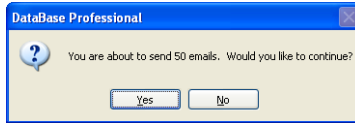
While DataBase is sending your email message you might not be able to access your email service. We recommend that you plan to send an email message to your mailing list at a time of day when you may not need to use your email service for other email messages.

DataBase can send approximately 16 messages per minute or 1000 messages per hour.

## Sending the Email Message

To send the selected message, click the **Send Email** button. A window appears with some important information about email rules. For more information, see [“Establishing Good Email Customer Relationships” on page 230](#).

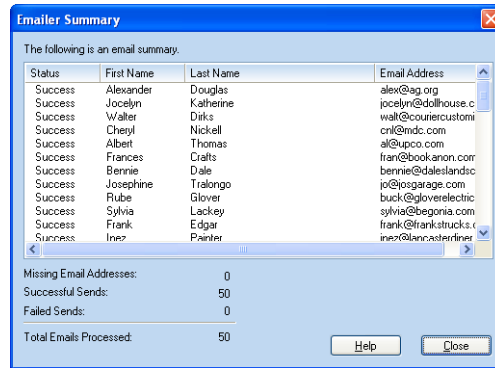
A confirmation dialog appears with a message to confirm the number of emails to be sent and ask if you would like continue.



Click **Yes** in the Email Confirmation dialog to begin the process of sending the email. A progress indicator appears showing the percentage of emails sent. The **Cancel** button gives you the option of canceling the sending process stopping the remaining emails from being sent.

## Using the Emailer Summary

After the emails are sent, the Email Summary displays a list of the email addresses where you sent this email.



Each email address has a status assigned to it to let you know whether or not the email was successfully sent to that address. The list displays the recipients of the email along with the status of the email that was sent to each recipient. Use the scroll bars on the right and the bottom to view the entire list. To sort the list, click one of the column headings.

The following messages may appear in the status column:

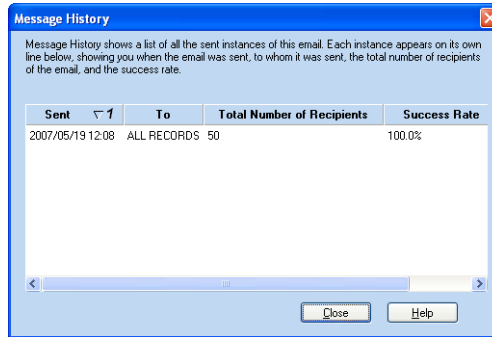
<b>Success</b>	The message was sent successfully.
<b>Fail</b>	The message was not able to be sent. This may be due to an incorrect entry in the Email Preferences dialog or an incorrectly entered email address.
<b>Skipped</b>	The email address is missing, so the program skipped this recipient. To send future emails to this recipient, enter an email address in the contact information for this recipient.
<b>Canceled</b>	The email was not sent, because the email process was interrupted.

The summary below the list displays the following information:

<b>Missing Email Addresses</b>	The number of selected recipients that do not have an email address in the email field.
<b>Successful Sends</b>	The number of emails that were successfully sent.
<b>Failed Sends</b>	The number of emails that failed to be sent. This may be due to an incorrect entry in the Email Preferences dialog or an incorrectly entered email address.
<b>Total Emails Processed</b>	The total number of emails processed, including <b>Missing Email Addresses</b> , <b>Successful Sends</b> , and <b>Failed Sends</b> .

## Viewing the Message History

The message history dialog shows a list of all instances a selected message has been sent. To view the history of a message, choose the message and then click the **Manage Message** button and choose **Message History**.



Each sending instance appears on a separate line telling when the message was sent, to whom it was sent, the total number of recipients, and the success rate. The history list can be sorted by clicking a column heading.

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## Establishing Good Email Customer Relationships

Respecting and protecting the privacy rights of your customers is a fundamental element of email marketing.

When sending email to customers in your mailing list, be sure to follow these guidelines.

- [Don't Send Unsolicited Email Messages \(see page 231\)](#)
- [Provide Notice Within Email Messages \(see page 232\)](#)
- [Send Relevant Content \(see page 233\)](#)
- [Protect Recipient's Personal Information \(see page 233\)](#)

## Don't Send Unsolicited Email Messages

Sending customers an email message that is part of a mass mailing without their permission, or sending an email to an inappropriate list is considered SPAM or Unsolicited Commercial Email.

The following table provides you with guidelines for sending acceptable email messages.

Acceptable Email	For Example...
The customer has opted-in to receive the email.	"you're receiving this email because you opted-in to receive our newsletter."
The email updates the status of an order.	"Thank you for your recent order. Please make note of this reference number: 4231."
The email is in regards to an invoice or receipt.	"Thank you for using our service. Below is your invoice for the month of December."
The email acknowledges receipt of communications.	"Thank you for your message. We received it and will get back to you as soon as possible."

### *Gaining Consent*

Consent is the process in which a recipient actively gives permission to be added to your list to receive future communications. Consent can be given by marking a check box or clicking a button that you provide on your business Web site.

Refrain from using pre-checked opt-in boxes to gain consent. A pre-checked box doesn't qualify as gaining consent. Forcing your customers to actively clear a box in order to not receive emails from your company is a form of opt-out, not opt-in.

Invite your customers to opt-in to your email list. Include the following in your invitation to opt-in.

- Let the customer know how you obtained their names and/or email addresses.
- Invite the customer to register for future emails.
- Inform the customer that they won't be added to your email list if they ignore or delete the invitation email.
- Let the customer know how they can register complaints and unsubscribe.

## ***Collecting Personal Information***

Provide your customers with a clear and conspicuous notice at the point of collection of their personal information. Include in your notice the primary purpose for collecting their personal information.

When your customers are informed about why you want information from them, they will feel more comfortable about giving it to you and will more likely give you permission to send them email messages.

## **Provide Notice Within Email Messages**

When you send email messages to your customers, be sure to include the following information.

- The name of your company
- A valid “From” address to which customers can reply
- A prominent notice stating how the customer can contact you and unsubscribe to your email list



**NOTE:** When sending emails to AOL addresses, your emails should also include information about how you obtained the customer’s email address, your mailing address, and whether it’s a one-time mailing or a recurring mailing.

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## ***Removing Unsubscribers From Your Email List***

Customers who unsubscribe to your email list shouldn’t receive any future emails unless they opt-in again. Removing all unsubscribes from the email list before your next mailing will prevent you from sending an email to recipients who have recently requested to be unsubscribed.

An easy way to filter your email list of unsubscribers is to mark a **Do Not Email List** check box in the Data Entry window. Before you send an email message, those records marked with **Do Not Email List** can be filtered out of the list so that they won’t receive the email message.

You can also use a **Do Not Call List** check box in a similar way to filter out those who do not want to be called on the telephone.



## **Send Relevant Content**

Send email messages that contain information that your customers are interested in. This practice will lower your unsubscribe rate and increase customer satisfaction.

## **Protect Recipient's Personal Information**

Take reasonable measures to limit access to customer's personal information and to ensure that individuals with access to the personal information don't utilize it for unauthorized purposes.

For more information about protecting consumer privacy, contact the Direct Marketing Association (DMA) at <http://www.the-dma.org/>.



# Creating Form Letters

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## Overview

You can use the email message editor to create a printed, professional-looking form letter with special fonts, colors, and graphics.

The steps used to create a form letter are similar to those of creating an email message. In fact, the form letter and email can be the same letter.

Form letters, like email messages, can also use fields within the message body to personalize the letter. In addition, the **To** button is used to determine for whom the letters are printed. For more information, see [“Adding Recipients to an Email” on page 216](#).



**TIP:** Hyperlinks with link text, such as **Click Here**, don’t display the actual link code (or URL) in the body of printed form letters (see [“Inserting a Hyperlink” on page 225](#)). If you want to include a link address, add it to the message text.

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For information about creating email messages, see [“Sending Email Messages” on page 213](#).

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## Using Headers and Footers

Headers and Footers are editable portions of the letter located at the top and bottom of the letter. These sections can contain pictures, headlines, addresses, or other information to create a more professional letter. Headers and footers do not appear in email messages.

### *To Add a Header and Footer*

Open the **Edit** menu and choose **Header/Footer**. The dotted line separates the header and footer from the body of the message. You can click in either the header (top) or the footer (bottom) and enter formatted text, add fields, or insert pictures.

To turn off editing the header or footer, open the **Edit** menu and choose the **Header/Footer** again. This leaves the header and footer visible, while preventing you from making any unwanted changes.

### *To View the Header and Footer*

Open the **View** menu and choose **Header/Footer** to show or hide the header and footer.



**TIP:** Headers and Footers always print, so be sure to view them before printing the form letter.

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## Adding Page Numbers

Page numbers can be added to the header or footer of the letter. The page numbers automatically adjust as additional pages are added.

1. Open the **Edit** menu and choose **Header/Footer** to turn on editing for the header and footer.
2. Click in the header or footer where you want to insert the page number.
3. Open the **Insert** menu, choose **Page Numbering** and then choose one of the options.
  - **Page Number** inserts the number of the page, such as **1, 2, 3**, etc.
  - **Total Number of Pages** inserts the page number of the total number of pages, such as **1 of 4, 2 of 4, 3 of 4**, etc.

You can use the formatting options to change the way the page numbers look. For more information, see [“Formatting the Message Text” on page 218](#).

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## Previewing Form Letters

You can preview a message to see how it will look as a printed form letter.

1. Click the email message in the **Email Messages** list.
2. Click the **Manage Message** button and choose **Edit Message** to open the email editor.
3. Open the **Message** menu and choose **Print Preview** or click the **Print Preview Message** button in the toolbar to display a preview of the form letter using the data from the selected records in your database.

If there are no recipients for the message, the field names appear in the preview (see [“Adding Recipients to an Email” on page 216](#)).

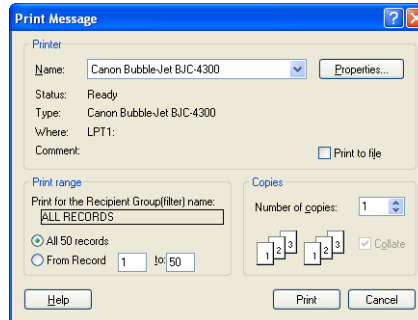
You can use the buttons in the toolbar at the top of the preview window to print, setup your printer, navigate through the pages, change the page view, and close the window.

4. When you’re finished previewing the message, click the **Print** button to print the letters or click the **Close** button to close the window.

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## Printing Form Letters

1. Click the email message in the **Email Messages** list.
2. Click the **Manage Message** button and choose **Edit Message** to open the email editor.
3. Open the **Message** menu and choose **Print** or click the **Print Message** button in the toolbar to open the Print Message dialog..



4. Make sure the correct printer is selected.
5. Select the records to print from the options in the **Print Range** box.
  - The selected Recipient Group (filter)
  - All records
  - A range of records
6. Enter the number of copies of each record you want to print.

The number you enter determines the number of letters to print for each record. For example, if you want to print two copies for each record, enter 2.
7. If you're making multiple copies of more than one record, set the **Collate** option.
  - Check the **Collate** box to print the entire set of records once, and then print the entire set again until the number of copies you entered have been printed.
  - Uncheck the **Collate** box to print the first record the number of times you entered in the **Copies** box, followed by the second record, etc.
8. Click **Print** to begin printing your letters.

# REPORTS

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<b>Creating Standard Reports</b>	<b>241</b>
<b>Creating Custom Reports</b>	<b>257</b>





# Creating Standard Reports

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## Overview

DataBase allows you to create and print standard and custom reports from your database.

- Standard reports appear and print your data in a table. You can choose the fields to include in your report, calculate subtotals, filter the records for your report, and format the text that will appear in your report.
- Custom reports have a flexible design that allows you to determine which data fields to use and how the report will appear and print. For more information about working with the Custom Reports window, see [“Creating Custom Reports” on page 257](#).

Regular users can customize the reports in their **Personal Reports** list only. The reports in the **Shared Reports** list can be customized only by the database administrator.

The administrator doesn't have a **Personal Reports** list when using the **Administrator** login.

Regular user's can copy forms from the **Shared Reports** list to their **Personal Reports** list. However, you can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

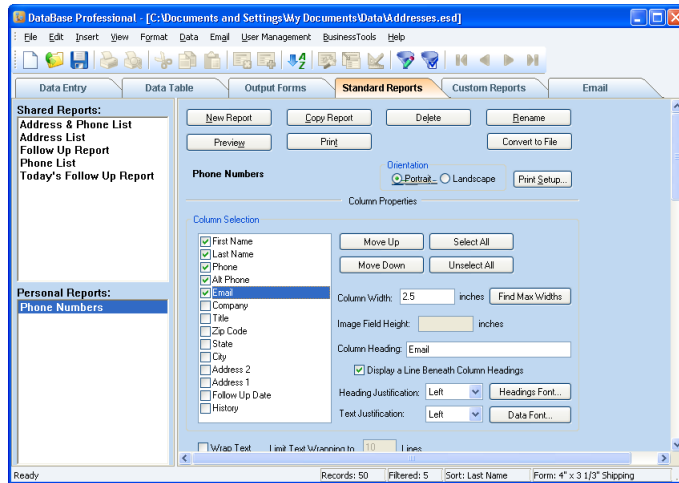
To view the Standard Reports window, click the **Standard Reports** tab.

## Choosing an Existing Standard Report

To view the existing standard reports, click the **Standard Reports** tab. The existing reports appear in the left panel of the Reports window.

*If you're using a custom database, you need to create the reports.*

*You can make changes to the report in the right side of the Reports window.*



To choose a standard report, click a report name on the left.

- Regular users can choose the reports in the **Shared Reports** list or in their **Personal Reports** list.
- The administrator doesn't have a **Personal Reports** list when using the **Administrator** login.

The forms in the **Shared Reports** list can be customized only by the database administrator.

You can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

Regular user's can copy forms from the **Shared Reports** list to their **Personal Reports** list. However, you can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

---

## Editing a Standard Report

You can make changes to an existing standard report, create new reports, and delete reports in the Standard Reports window. You can use a report in the list as a template by making a copy of the report and renaming it.

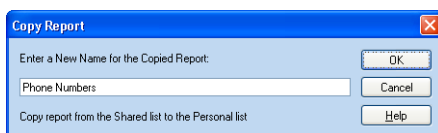
If you want to modify a standard report, you can make changes to the format, the sorting and filtering of records, and the total and subtotal configuration.

The forms in the **Shared Reports** list can be customized only by the database administrator. However, Regular users can copy a shared report to their **Personal Reports** list to customize it. You can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

### Copying a Standard Report

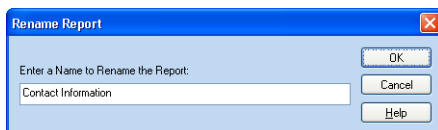
When you create a copy of a standard report you give a new name to the copy of the original report while keeping the original report unchanged. You can modify the copy using the Standard Reports window.

To create a copy of a standard report, select a report name listed on the left side of the Standard Reports window and then click the **Copy Report** button. Name the new report in the Copy Report dialog and then click **OK**.



### Renaming a Standard Report

To rename a standard report, select a report name listed on the left side of the Reports window and then click the **Rename** button.

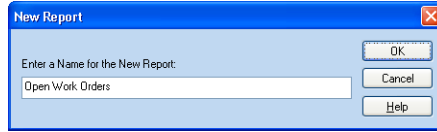


Enter a new name and then click **OK**.

The reports in the **Shared Reports** list can only be renamed by the database administrator.

## Creating a New Standard Report

1. Click the **New Report** button to open the New Report dialog.



2. Enter the report name in the New Report dialog.
3. Click **OK** to close the New Report dialog.

The report name appears on the left side of the Standard Report window.

## Deleting a Standard Report

You can delete a standard report from your DataBase file. Select the report in the list of reports on the left side of the Standard Reports window.

The reports in the **Shared Reports** list can be deleted only by the database administrator.

To delete the report from your data file, click **Delete**.



**NOTE:** When you delete a standard report, the data in the fields of the report remains in the database.

---

## Setting Up the Page Layout for a Standard Report

When you create or print a standard report, you can choose the page orientation and other printer-specific layout options. You can also set readability options, such as drawing lines and setting margins.

- For information about choosing the page orientation, see [“Choosing the Page Orientation” below](#).
- For printer-specific layout options, click the **Print Setup** button to open the Print Setup dialog for your printer (see the documentation for your printer).
- For information about drawing lines and setting margins, see [“Setting Readability Options” on page 253](#).

## Choosing the Page Orientation

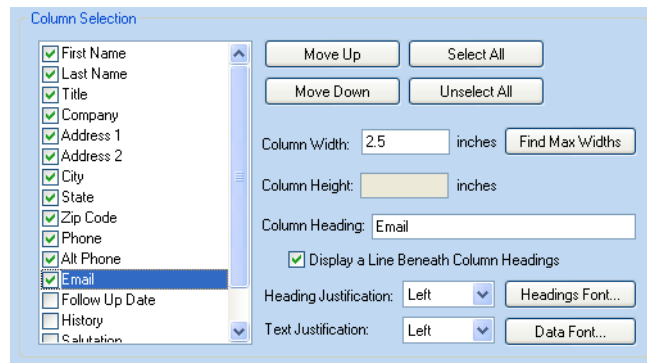
To set the report page orientation, choose one of these options.

- Portrait** The report prints with the top of the page along the short side of the paper.
- Landscape** The report prints with the top of the page along the long side of the paper.

---

## Adding and Removing Columns in the Standard Report

Format the columns in your standard report in the **Column Selection** section of the Standard Reports window.



Choose the fields you want to include in your report in the **Field Selection** box. You can also set the order of the fields, the Column Width, and enter a Column Heading in the **Field Selection** box.

The reports in the **Shared Reports** list can be customized only by the database administrator.

## Choosing the Fields for the Standard Report

All of the fields in your data file are listed in the **Field Selection** box.

- To choose a field that you want to appear in your report, check the box next to the field.
- To choose all the fields in the field list, click the **Select All** button.
- To uncheck all the field boxes, click **Unselect All**.

Only the fields that you check will appear in your report.

## Changing the Order of the Columns

You can change the order that the fields appear in your report by clicking the **Move Up** and **Move Down** buttons.

To move a field to a new position, choose a field in the field list.

- To move the column to the left, click the **Move Up** button.
- To move the column to the right, click the **Move Down** button.

Continue to click the **Move Up** or **Move Down** buttons until the field is in position you want.

## Setting the Size of a Column

You can define a different column width for each field in your report.

To set the column width for a field, click the field name in the list and enter the width in inches in the **Column Width** box.

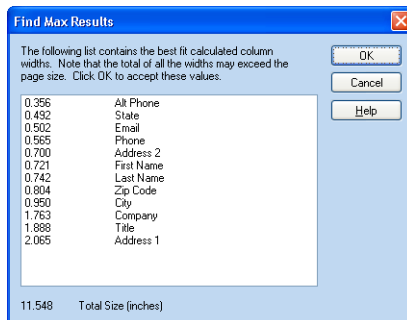
When you choose an Image field, you can set the height of the field for the report by entering the height in the **Image Field Height** box.

### *Finding the Maximum Column Width*

When the data in a field is longer than the column width, it won't all appear in the column. DataBase can scan the data in the fields of each column to find the record with the maximum text, and then use this text length to set the width for each of the columns in the report.

1. To begin the text scan, click the **Find Max Widths** button.

When DataBase is finished scanning the text, the Set Column Width dialog displays a list of all the fields scanned and the suggested column settings.



2. To accept the suggested column widths, click **OK**.

## Setting the Text in the Column Heading

Enter the Column Heading for a selected field in your report in the **Column Heading** box. The text you enter appears at the top of the column for the selected field.

- To set the alignment of the Column Heading, click the **Heading Justification** drop-down arrow and choose **Left**, **Right**, or **Center**.
- To display a line under the Column Heading, check the **Display a Line Beneath Column Headings** box.
- To define the font settings for the Column Headings in your report, click the **Headings Font** button. Choose the font options in the Font dialog (see [“Choosing the Font” on page 163](#)) and then click **OK** to return to the Standard Reports window.

## Formatting the Text in the Column

To set the alignment of the text that appears in the columns of your report, click the **Text Justification** drop-down arrow and choose **Left**, **Right**, or **Center**.

To specify the font size and style for the text in your report, click the **Data Font** button. Choose the font options in the Font dialog (see [“Choosing the Font” on page 163](#)) and then click **OK** to return the Reports window.

After changing the font, you might want to check for the recommended maximum column widths (see [“Finding the Maximum Column Width” on page 246](#)).

## Setting the Text-Wrap Option

To wrap the text within a column, check the **Wrap Text** box.

To specify the number of lines to wrap, click in the box to the right of the phrase **Limit Text Wrapping to** and enter the number of lines.

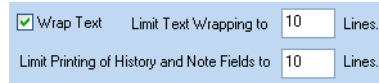
<input checked="" type="checkbox"/> Wrap Text	Limit Text Wrapping to	<input type="text" value="10"/>	Lines.
Limit Printing of History and Note Fields to		<input type="text" value="10"/>	Lines.



**NOTE:** If **Wrap Text** isn't marked, only one line of text within a field will display in the report. Notebox and History fields will print multiple lines even if this check box isn't marked (see [“Defining Notebox and History Field Data” below](#)).

## Defining Notebox and History Field Data

To specify the maximum rows of the history field that you want to display or a Notebox field to wrap, enter a number in the box after the phrase **Limit Printing of History and Note Fields to**. For example, if you want to display 10 rows of the history field you would enter 10 in the **Lines** box.



<input checked="" type="checkbox"/> Wrap Text	Limit Text Wrapping to	10	Lines.
<input type="checkbox"/>	Limit Printing of History and Note Fields to	10	Lines.

---

## Sorting and Filtering the Data for the Standard Report

*The reports in the **Shared Reports** list can be customized only by the database administrator.*

DataBase makes it easy to work with your data and select the records that you want to include in your standard report. You can sort your records to determine the order of the records in the report or apply a filter so that only particular records are included in your report.

To sort and filter the data for your standard report, scroll down to the **Sorting, Filtering, Subtotal Properties** section of the Standard Reports window.

### Sorting Records for the Standard Report

You have three options for sorting your records:

- **Use Active Sort** allows you to sort your records using the same sort that you defined in the Data Table or the Data Entry window (see [“Sorting Your Data” on page 98](#)).
- **Use Custom Sort** allows you to define a new sort that applies only to the report you’re creating. When you create a custom sort, the new sort settings are saved with the report; The sort settings that you defined in the Data Table or Data Entry window aren’t changed. To open the sort dialog and define the custom sort settings, click the **Custom Sort** button (see [“Using the Sort Dialog” on page 99](#)).
- **Use Sort with Subtotals** allows you to sort your records and define columns of numeric, currency, and calculated fields to total and subtotal for your report (see [“Determining the Total and Subtotal Configuration” on page 249](#)).

You can define both a Custom Sort and a Subtotal Configuration, but only one type of sort can be applied to a report when it’s previewed or printed. The Custom Sort and the Subtotal Configuration that you create are saved with the report so that you can choose either option when you preview or print the report.



## Filtering Records for the Standard Report

You have two options for filtering records:

- **Use Active Filter** allows you to filter your records using the same filter that you that you defined in the Data Table or the Data Entry window (see [“Filtering Records” on page 100](#)).
- **Use Custom Filter** allows you to define a new filter that applies only to the report you’re creating. When you create a custom filter, the new filter settings are saved with the report. The filter settings that you applied to the Data Table or Data Entry window aren’t changed. To open the filter dialog and define the custom filter settings, click the **Custom Filter** button (see [“Filtering Records” on page 100](#)).

---

## Determining the Total and Subtotal Configuration

DataBase allows you to total and subtotal numeric, currency, and calculated fields between records according to the criteria you set. You can set up to three nested subtotal sorts.

To calculate subtotals between records, choose the **Use Sort with Subtotals** option (see [“Setting the Subtotal Configurations” below](#)).



**NOTE:** You can’t use a Custom Sort and a Sort with Subtotals at the same time in a standard report.

---

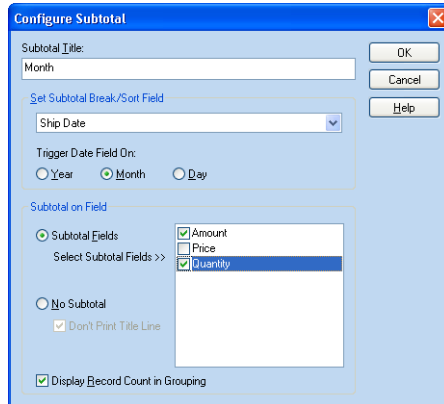
To display a total of the values in a numeric, currency, or calculated field at the end of the report, mark the **Show Total** check box (see [“Configuring the Standard Report Total” on page 252](#)).

The reports in the **Shared Reports** list can be customized only by the database administrator.

## Setting the Subtotal Configurations

To set the primary sort with subtotal, check the **Show Subtotal/Sort 1** box. Check the other **Show Subtotal/Sort** boxes if needed.

Click the **Configure** button to open the Configure Subtotal dialog and define the settings for the primary subtotal.



When you're finished defining the settings for the subtotal, click **OK** to close the Configure Subtotal dialog.

The Configure Subtotal dialog is described in the following sections.

### ***Setting the Text for the Titles***

To identify the subtotals in your report, you can give each subtotal a title. Click in the **Subtotal Title** box and enter the text for the title.

When you're finished defining the settings for the subtotal you can format the font (see [“Formatting the Font for the Subtotal Text”](#) on page 252).

*Subtotal values appear in the Subtitle Title row under the column that is subtotaled.*

## ***Determining When to Calculate the Subtotal***

You can define three layers of subtotals for a report. Subtotal 1 is the Primary subtotal followed by Subtotal 2 and then Subtotal 3.

For example, you may want to know which products have been sold in each territory and by which sales representative. You could set the subtotal fields as follows:

- Subtotal 1 field define as Territory
- Subtotal 2 field define as Sales Representative
- Subtotal 3 field define as Product

When the report filters your data using the subtotals, it prints the sales representative names for each territory and the products that they sold.

To define a subtotal field, choose a field in the **Set Subtotal Break/Sort Field** drop-down list. When the data in the field changes, the subtotal appears.

When you choose a Date field, select an option for **Trigger Date Field On:**

- |              |  |
|--------------|--|
| <b>Year</b>  | The subtotal is calculated when the year changes.  |
| <b>Month</b> | The subtotal is calculated when the month changes. |
| <b>Day</b>   | The subtotal is calculated each day.               |

## ***Determining Which Fields to Subtotal***

DataBase can calculate a subtotal value for numeric, currency, and calculated fields.

To choose a field to subtotal, choose the **Subtotal Fields** option and then select the fields to be subtotaled when the **Subtotal Break/Sort Field** changes. Choose fields by checking the box next to the fields you want to subtotal.

To group the data when the **Subtotal Break/Sort Field** changes without subtotaling a column, choose the **No Subtotal** option. If you want to print a title line for the sort, uncheck the **Don't Print Title Line** box and enter the title in the **Subtotal Title** box.

## ***Counting the Records in the Subtotal***

To display the number of records included in the subtotal, check the **Display Record Count in Grouping** box at the bottom of the Configure Subtotal dialog.

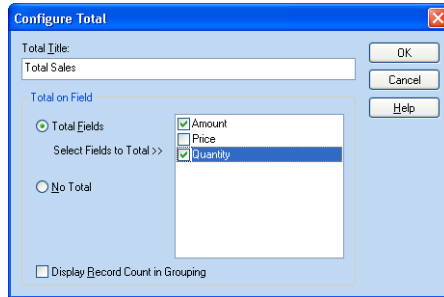
If you choose the **No Subtotal** option and check the **Don't Print Title Line** box, the record count won't be included.

## Formatting the Font for the Subtotal Text

To choose the font for text that appears in the Subtotal portion of your report, click the **Font** button for the Subtotal/Sort in the Standard Reports window (see [“Choosing the Font” on page 163](#)).

## Configuring the Standard Report Total

Check the **Show Total** box and click the **Configure** button to open the Configure Total dialog and define the settings.



1. Enter a title for the total in the **Total Title** box.
2. Choose the **Total Fields** option and then choose the fields listed in the box that you want to total.

You can total only numeric, currency, and calculated fields. If the field you want to total isn't in the list, you need to change the field type of that field (see [“Choosing the Field Type” on page 55](#)).

3. Check the **Display Record Count in Grouping** box to print the number of records in the total.

The Record Count appears in the far-right column.

4. Click **OK** to close the Configure Total dialog.

To set the font of the Title for the Total, click the **Font** button (see [“Choosing the Font” on page 163](#)).

---

## Setting Readability Options

You can set spacing and rules for your report by checking the following boxes:

<b>Double Spaced</b>	Sets the line spacing of the report.
<b>Show Column Separator Lines</b>	Displays vertical column lines between the fields in the report
<b>Show Row Separator Lines Every</b>	Displays horizontal lines between records in your report.
	Enter the frequency of the Row Separator Lines in the <b>Records</b> box.

The reports in the **Shared Reports** list can be customized only by the database administrator.

## Setting the Margins

To set the margins for the report, click the **Set Margins** button to open the Margins dialog.



Enter the distance from the edge of the page in the boxes:

<b>Top</b>	Enter the distance you want between the top of the page and the top of the first line in the report.
<b>Left</b>	Enter the distance you want between the left edge of the page and the left edge of unindented lines.
<b>Right</b>	Enter the distance you want between the right edge of the page and the right end of a line that has no right indent.
<b>Bottom</b>	Enter the distance you want between the bottom of the page and the bottom of the last line in the report.

To move the cursor from one margin setting to the next, press the TAB key. When you're finished entering your margin settings, click **OK**.

---

## Editing Header and Footer Information

You can display a header and/or a footer in your report that includes a title for the report, page number(s), and the date. You can also add a line above or below a header or footer. The **Header Properties** and **Footer Properties** sections are near the bottom of the Standard Reports window.

- To include a header in your report, check the **Use Header** box.
- To include a footer in your report, check the **Use Footer** box.

The reports in the **Shared Reports** list can be customized only by the database administrator.

### Setting the Text for the Title

To print the title for your report in the header or footer, click in the **Title** box and enter the title of your report.

To set the position of the title, click the **Justify** drop-down arrow and choose **Left**, **Right**, or **Center**.

To set the font for the title, click **Title Font** button and specify the font settings in the Font dialog (see [“Choosing the Font” on page 163](#)).

### Setting the Page Number and Date

To display a page number in the header or footer, check the **Display** box in the **Page #** box.

To display a date in the header or footer, check the **Display** box in the **Date** box.

To set the alignment of the page number or date, click the **Justify** drop-down arrow and choose **Left**, **Right**, or **Center**.

To set the font for the page number and the date, click **Page #/Date Font** button and specify the font settings in the Font dialog (see [“Choosing the Font” on page 163](#)).

### Drawing a Line Above or Below the Text

To print a line above the header or footer, choose the **Above Header** or **Above Footer** option.

To print a line below the header or footer, choose the **Below Header** or **Below Footer** option.

### Setting the Height of the Header or Footer

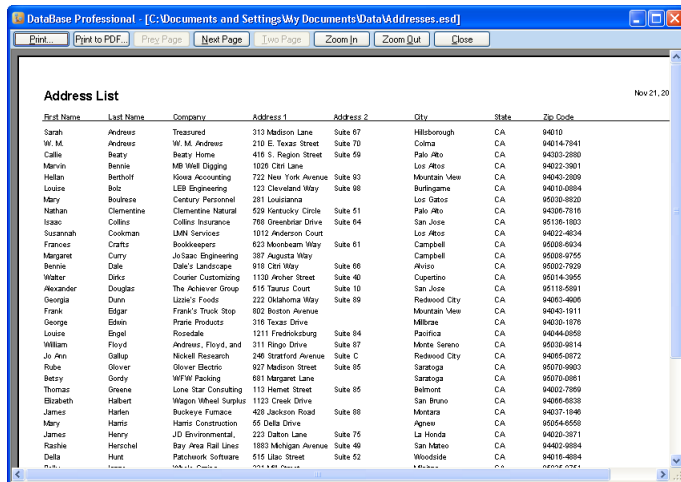
You can specify the amount of space below the top margin for the header or the amount of space above the bottom margin for the footer.

To specify the space, click in the box to the right of **Header Height** or **Footer Height** and enter the amount in inches.

---

## Previewing a Standard Report

To generate and preview the report before you print, click **Preview**.



The screenshot shows a software window titled "Database Professional - [C:\Documents and Settings\My Documents\Data\Addresses.esd]". The window has a menu bar with "Print...", "Print to PDF...", "Prev Page", "Next Page", "First Page", "Zoom In", "Zoom Out", and "Close". Below the menu bar is a table titled "Address List" with a date stamp "Nov 21, 20". The table has columns: First Name, Last Name, Company, Address 1, Address 2, City, State, and Zip Code. The table contains 40 rows of address data.

First Name	Last Name	Company	Address 1	Address 2	City	State	Zip Code
Sarah	Andrews	Treasured	213 Madison Lane	Suite 67	Hillsborough	CA	04010
W. M.	Andrews	W. M. Andrews	210 E. Texas Street	Suite 70	Colma	CA	04014-7841
Callie	Batty	Batty Home	416 S. Region Street	Suite 59	Palo Alto	CA	04022-2080
Mervin	Bennie	MB Well Digging	1026 Chin Lane		Los Altos	CA	04022-3901
Hellan	Bethloff	Kowa Accounting	722 New York Avenue	Suite 93	Mountain View	CA	04040-2809
Louise	Bolz	LEB Engineering	123 Cleveland Way	Suite 98	Burlingame	CA	04010-0894
Mary	Bojarske	Century Personnel	281 Louisiana		Los Gatos	CA	05010-8520
Nathan	Clementine	Clementine Natural	539 Kentucky Circle	Suite 51	Palo Alto	CA	04006-7816
Isaac	Collins	Collins Insurance	768 Greenbrier Drive	Suite 04	San Jose	CA	05136-1803
Suzannah	Cookman	UMN Services	1012 Anderson Court		Los Altos	CA	04022-4634
Frances	Crafts	Bookkeepers	623 Moonbeam Way	Suite 01	Campbell	CA	05008-6934
Margaret	Curry	JoSaar Engineering	387 Augusta Way		Campbell	CA	05008-0755
Bennie	Dale	Dale's Landscaping	918 Chin Way	Suite 66	Aviezo	CA	05002-7929
Walter	Dirks	Counter Customizing	1130 Archer Street	Suite 40	Cupertino	CA	05014-3955
Alexander	Douglas	The Achiever Group	615 Thorne Court	Suite 10	San Jose	CA	05118-5891
Georgia	Dunn	Litton's Foods	222 Oklahoma Way		Redwood City	CA	04082-4626
Frank	Edgar	Frank's Truck Stop	802 Boston Avenue		Mountain View	CA	04040-1011
George	Edwin	Prairie Products	218 Texas Drive		Millbrae	CA	04030-1078
Louise	Engel	Rosedale	1211 Fredricksburg	Suite 84	Pacifica	CA	04044-0858
William	Floyd	Andrews, Floyd, and	211 Ringo Drive	Suite 87	Monterey	CA	05030-9814
Ju Ann	Gallup	Nickell Research	246 Stratford Avenue	Suite C	Redwood City	CA	04065-0872
Rube	Glover	Glover Electric	627 Madison Street	Suite 85	Saratoga	CA	05010-0603
Betsy	Gordy	WFW Parking	661 Margaret Lane		Saratoga	CA	05010-0561
Thomas	Greene	Lone Star Consulting	113 Hemet Street	Suite 85	Belmont	CA	04002-7899
Elizabeth	Halbart	Wagon Wheel Surplus	1123 Creek Drive		San Bruno	CA	04006-6838
James	Hallen	Buskeys Furniture	428 Jackson Road		Montara	CA	04027-1940
Mary	Harris	Harris Construction	65 Dallas Drive		Aguila	CA	05054-6558
James	Henry	JD Environmental	223 Dalton Lane	Suite 76	La Honda	CA	04020-3971
Marilee	Herschel	Ray Area Rail Lines	1883 Moligan Avenue	Suite 49	San Mateo	CA	04402-0894
Della	Hart	Platonic Software	516 Lila Street	Suite 52	Woodside	CA	04010-4834

From the Preview window, you can print the report, create a PDF version of the report, navigate the pages of the report, and zoom in and out on the report.

To close the Preview window and return to the Standard Reports window, click the **Close** button.

---

## Printing a Standard Report

When you finish preparing the settings for your report, you can print the report. To open the Print dialog, click **Print**. For information about using the Print dialog, see [“Printing Output Forms” on page 193](#).

Click **OK** in the Print dialog to generate and print your report.

---

## Exporting a Standard Report

When you finish preparing the settings for your report, you can export the report to a file. You can convert the report to an unformatted text file (\*.txt), a formatted text file (\*.rtf), a print-ready file (\*.pdf), or a web-ready file (\*.htm, \*.html).

1. Choose the report from a list on the left.
2. Click the **Convert to File** button to open the Save As dialog.
3. Choose the format for the file from the **Save as type** drop-down list.
4. Navigate to and open the folder where you want to save the file.
5. Enter a name for the file.
6. Click **Save** to save the exported report file.



# Creating Custom Reports

---

## Overview

DataBase allows you to create and print standard and custom reports from your database.

- Standard reports appear and print your data in a table. You can choose the fields to include in your report, calculate subtotals, filter the records for your report, and format the text that will appear in your report. For more information about working with the Standard Reports window, see [“Creating Standard Reports” on page 241](#).
- Custom reports have a flexible design that allows you to determine which data fields to use and how the report will appear and print.

Regular users can customize the reports in their **Personal Reports** list only. The reports in the **Shared Reports** list can be customized only by the database administrator.

The administrator doesn't have a **Personal Reports** list when using the **Administrator** login.

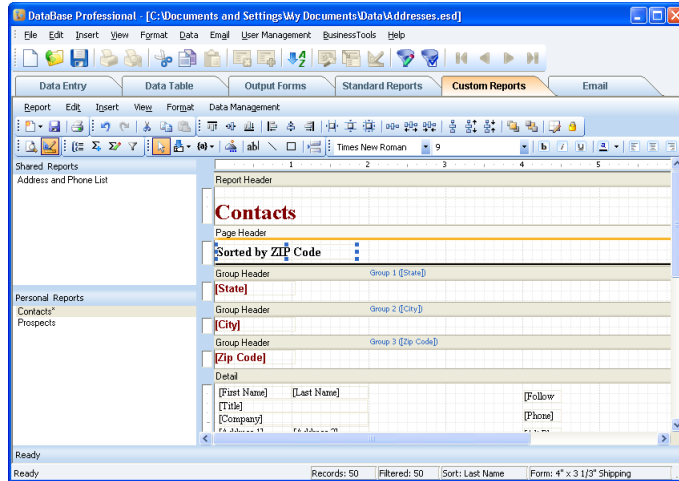
Regular user's can copy forms from the **Shared Reports** list to their **Personal Reports** list. However, you can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

To view the Custom Reports window, click the **Custom Reports** tab.

---

## Choosing a Custom Report

To view the custom reports, click the **Custom Reports** tab. The list of reports appear in the left panel of the Custom Reports window.



To choose a custom report, click a report name on the left.

- Regular users can choose the reports in the **Shared Reports** list or in their **Personal Reports** list.
- The administrator doesn't have a **Personal Reports** list when using the **Administrator** login.

You can make changes to the report in the right side of the Reports window.

The forms in the **Shared Reports** list can be customized only by the database administrator.

You can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

Regular user's can copy forms from the **Shared Reports** list to their **Personal Reports** list. However, you can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

---

## Organizing Custom Reports

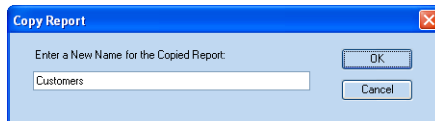
You can copy, rename, and delete existing custom reports in the Custom Reports window.

The forms in the **Shared Reports** list can be customized only by the database administrator. However, Regular users can copy a shared report to their **Personal Reports** list to customize it. You can't add a form from a Regular user's **Personal Reports** list to the **Shared Reports** list.

### Copying a Custom Report

When you create a copy of a custom report you give a new name to the copy of the original report while keeping the original report unchanged.

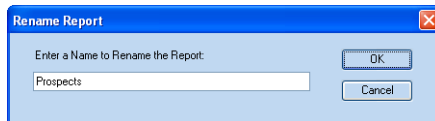
To create a copy of a custom report, right-click a report name listed on the left side of the Custom Reports window and then choose **Copy Report**.



Name the new report in the Copy Report dialog and then click **OK**.

### Renaming a Custom Report

To rename a custom report, right-click a report name listed on the left side of the Custom Reports window and then choose **Rename Report**.



Enter a new name and then click **OK**.

The reports in the **Shared Reports** list can only be renamed by the database administrator.

## Deleting a Custom Report

To delete a custom report from your DataBase file, select the report in the list of reports on the left side of the Custom Reports window and then press **DELETE** on your keyboard. After clicking **Yes** in the confirmation dialog, the report is permanently removed.

The reports in the **Shared Reports** list can be deleted only by the database administrator.



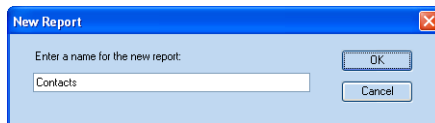
**NOTE:** When you delete a custom report, the data in the fields of the report remains in the database.

---

## Creating a Custom Report

You can use the wizard to help you create a new report, or create a blank report that you can customize from scratch.

- To create a new report using the wizard, open the **Report** menu and choose **New Report > New Report With Wizard** (see [“Using the New Report Wizard” on page 261](#)).
- To create a blank report, open the **Report** menu and choose **New Report > New Blank Report** to open the New Report dialog.



Enter a name for the new report and click **OK** to open a new blank report with the report name in the header.

For information about designing the report (see [“Customizing a Custom Report” on page 267](#)).

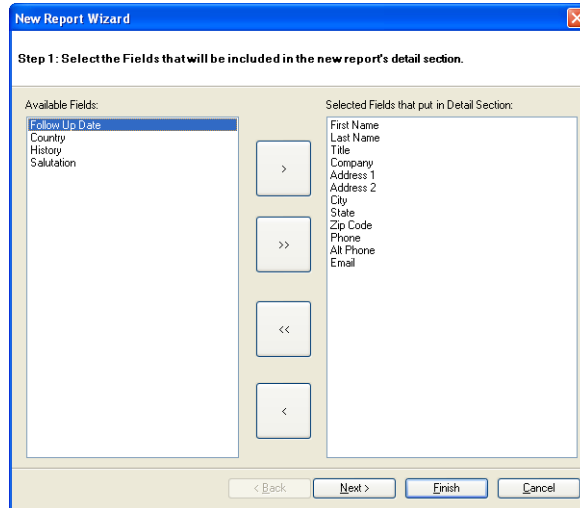
---

## Using the New Report Wizard



New Report  
Button

To start the New Report Wizard, open the **Report** menu and choose **New Report > New Report With Wizard**, or click the **New Report** button and choose **New Report With Wizard**.



In the first step of the wizard, select the fields that you want to use in your report.

- To add a field to the report, select the field in the **Available Fields** list and then click the top arrow button between the lists.
- To add all of the fields to the report, click the second arrow button between the lists.
- To remove all of the fields from the report, click the third arrow button between the lists.
- To remove a field from the report, select the field in the **Selected Fields** list and then click the last arrow button between the lists.

After selecting the field for the report, click **Next** to continue.

## Selecting Sort Groups in the Wizard

In the second step of the wizard, select the fields that you want to use for sorting the data in the report.

To sort the report by a field, select the field in the **Available Fields** list and then click the upper arrow button between the lists to place the field in the **Exist Groups** list. To remove a field from the **Exist Groups** list, select it and then click the lower arrow button between the lists.

You can choose to sort **Ascending** or **Descending**, and to keep none, part, or all of the information together in the report.

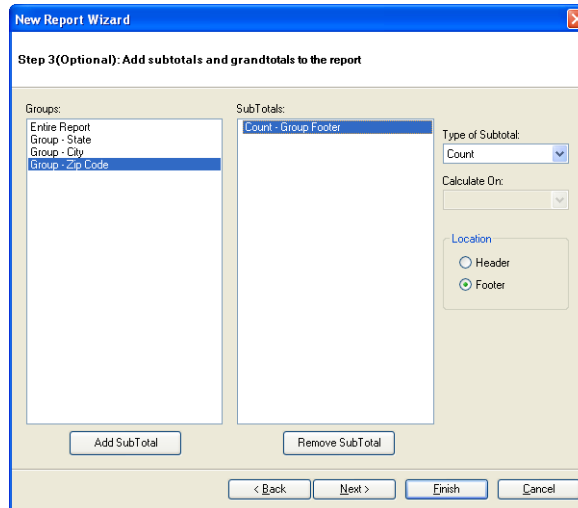
If you want the data from the sort field to appear in the header or footer of the group, choose the **Header** or **Footer** option. If you don't want the data to appear in the header or footer, choose **Not Shown**.

If you have more than one sort group, you can determine the order of the sort by selecting a group and clicking the **Up** and **Down** buttons to move the selected group earlier or later in the sort order.

After you finish defining your sort groups, click **Next** to continue.

## Adding Totals in the Wizard

In the third step of the wizard, select the sort groups that you want to use to show subtotals in the report.



To subtotal by a sort group in the report, select the sort group in the **Groups** list and then click the **Add SubTotal** button below the **Groups** list to place the field in the **SubTotals** list. To remove a sort group from the **SubTotals** list, select it and then click the **Remove SubTotal** button below the **SubTotals** list.

To add a grand total, select **Entire Report** in the **Groups** list and then click the **Add Grandtotal** button below the **Groups** list to add it to the **Grandtotals** list. To remove a sort group from the **Grandtotals** list, select it and then click the **Remove Grandtotal** button below the **Grandtotals** list.

To define a subtotal, select the sort group in the **Group** list and the subtotal in the **SubTotals** list, and then define the subtotal using the options on the right. To define a grand total, select **Entire Report** in the **Groups** list and the grand total in the **Grandtotals** list before defining the options.

If you have numeric fields in your database you can choose to **Count** the number of records or subtotal the **Sum** of a numeric field by selecting the subtotal **Type** and the field to **Calculate On**. Only numeric and calculated fields appear in the **Calculate On** drop-down list.

Define where the total appears on the report by choosing the **Header** or **Footer** option.

After you finish defining your totals, click **Next** to continue.

## Defining a Filter in the Wizard

In the fourth step of the wizard, define the filter for the report.

The screenshot shows the 'New Report Wizard' window, specifically 'Step 4 (Optional): Add filters to the report'. The 'Advanced' tab is selected. The 'Filter Name' is 'Local Area'. The 'Display All Records (No Filter)' checkbox is unchecked. The 'Display records if:' section shows a filter rule: 'City matches Menlo Park or City matches Palo Alto and Zip Code start with 940 or Zip Code start with 943'. The 'not in use' checkbox is checked. The 'Next >' button is highlighted.

You can choose a **Simple**, **Standard**, or **Advanced** filter by clicking one of the tabs at the top of the wizard. The filters you define for custom reports are independent from the filters you define for the database, but the procedures for defining filters is very similar. For information about defining filters, see [“Filtering Records” on page 100](#).

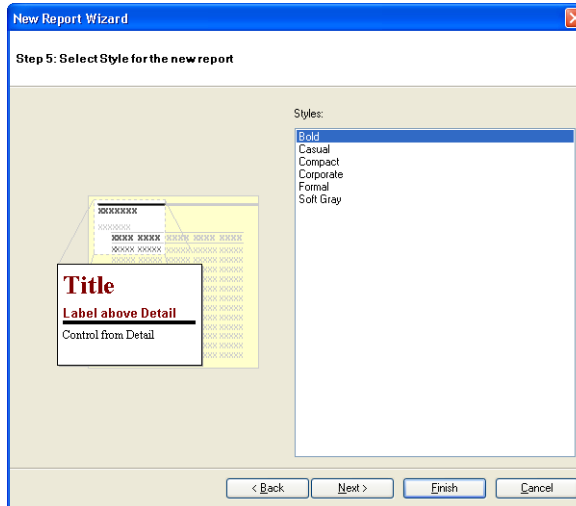
If you want to use all of your data in the report without filtering, check the **Display All Records** box at the top of the wizard.

After you finish defining your filter, click **Next** to continue.



## Choosing a Text Style in the Wizard

In the fifth step of the wizard, choose a text style for the report.

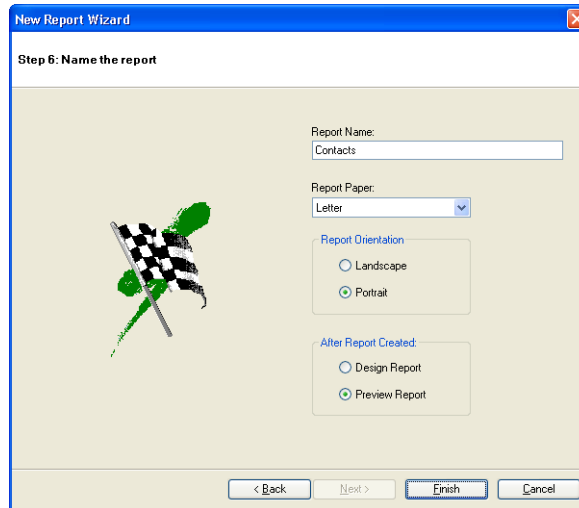


Choose a style from the list on the right. A preview of the style appears on the left.

After choosing a text style, click **Next** to continue.

## Naming the Report in the Wizard

In the sixth step of the wizard, enter a name and choose the page orientation for the report.



Enter the name of the report in the **Report Name** box. This name appears in the **Reports** list on the left side of the Custom Reports window and in the header of the report.

Choose either **Landscape** or **Portrait** page orientation for the report.

You can choose to view the report in the design view or the preview after closing the wizard by choosing either **Design Report** or **Preview Report**.

After naming the report and choosing the layout and view options, click **Finish** to close the wizard.

You can further customize the report using the features in the toolbars and menus in the Custom Reports window (see [“Customizing a Custom Report”](#) on page 267).

---

## Customizing a Custom Report

Below the tabs in the Custom Report window is a second set of menus and toolbars that contain features for customizing and working with reports.



The toolbars can be turned off and on by opening the **View** menu and choosing **Toolbars**, and then selecting the toolbar from the list. You can also drag the toolbars into different positions.

The design area on the right side of the Custom Reports window lets you define the layout of your report. In the Design view, the grid lines help you align the fields and text in the report.

- To turn the gridlines off and on in the Design view, open the **View** menu and choose **Show Grid**.
- To have the fields and text boxes attach to the grid lines when you move them, open the **View** menu and choose **Snap to Grid**.



Preview  
Button

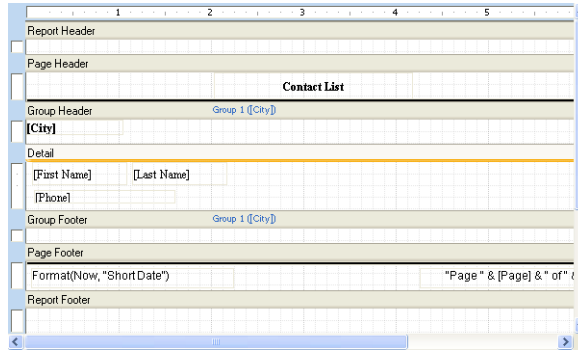


Design  
Button

To switch between the Design view and the Preview, open the **View** menu and choose **Design** or **Preview**, or click the **Design** or **Preview** buttons in the toolbar.

## Defining the Structure of a Custom Report

Custom reports use a “nested” structure of headers, footers, and details.

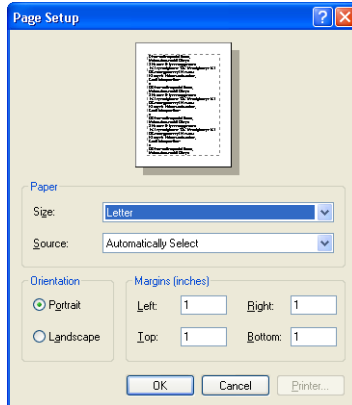


- The **Report Header** and **Report Footer** appear at the beginning and end of the entire report.
- The **Page Header** and **Page Footer** appear at the top and bottom of each page in the report.
- The **Group Header** and **Group Footer** appear at the top and bottom of each group. You can have multiple group headers and footers in a report.
- The **Detail** section appears within a group and can contain the data from the individual records in your database.

You can add fields, text, and graphics to any of the header, footer, or detail areas of your report. To change the height of a section, click and drag the line below the section.

## Choosing the Page Layout for a Custom Report

When you create or print a custom report, you can choose the page orientation and set the page margins. To set up the page for a report, select the report in the left pane and then open the **Report** menu and choose **Page Setup** to open the Page Setup dialog.



Define the paper size by choosing an option from the **Size** drop-down list. The available page sizes depend on the printer you're using. You can also choose the paper tray on your printer where your report paper will be.

Choose one of the **Orientation** options:

- **Portrait** prints the report with the top of the page along the short side of the paper.
- **Landscape** prints the report with the top of the page along the long side of the paper.

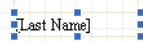
Set the page margins by entering numbers in the **Left**, **Right**, **Top**, and **Bottom** boxes.

Click **OK** to close the dialog and save your selections.

## Adding Data Fields to a Custom Report

You can add fields from your database to any of the header, footer, or detail areas of your report.

To add a data field, open the **Insert** menu and choose **Data Fields** or click the **Insert Data Field** button in the toolbar to open a list of the available fields in your database. Choose a data field from the list and then click in the Design area of the report to place the field.



You can click and drag the field to move it to any location on the report. To resize the field, click and drag one of the sizing handles.

## Adding Special Fields to a Custom Report

Special fields add specific content about the report to the report design. For example, you can add the page number to the page footer or add the date that the report was created or printed. You can add special fields to any of the header, footer, or detail areas of your report.

To add a special field, open the **Insert** menu and choose **Special Fields** or click the **Insert Special Field** button in the toolbar to open a list of the available special fields. Choose a special field from the list and then click in the Design area of the report to place the field.

You can click and drag the field to move it to any location on the report. To resize the field, click and drag one of the sizing handles.

## Adding Text to a Custom Report

You can add text to any of the header, footer, or detail areas of your report.

To add text, open the **Insert** menu and choose **Text** or click the **Insert Text Field** button. Then, click in the Design area of the report to place the text field.

To edit the text in the field, double-click in the field to highlight the text. After you finish editing the text, click the design area to deselect the field.

You can click and drag the text field to move it to any location on the report. To resize the text field, click and drag one of the sizing handles.

## Formatting Text in Custom Report Fields

You can change the font, size, and color of text in the fields of your report using the options in the toolbars or the Object Properties dialog. All of the text in a selected data field, special field, or text field changes when you choose formatting options.

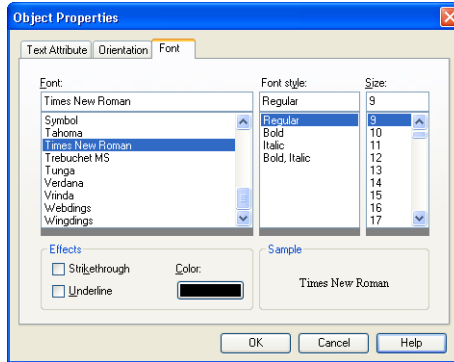
The Field Property toolbar gives you quick access to several text options for the text on your report.



To change the text format of a field using the Field Property toolbar, select the field and then click an option in the toolbar.

## To Format Text Using the Object Properties Dialog

1. Select the field that contains the text you want to format.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



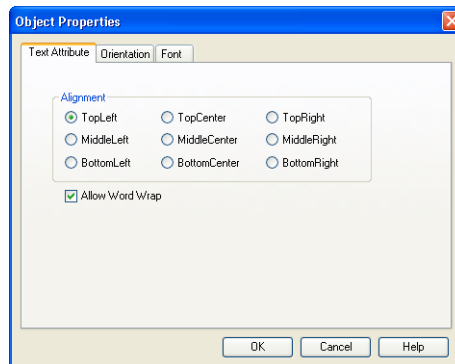
3. Click the **Font** tab to choose the font for the text in the field.  
As you make choices, the **Sample** box shows how the text will appear on your report.
4. Scroll in the **Font** box and choose a font that you want to use for your text.
5. Choose a **Font style** and **Size** from the available options.
6. Choose the effects that you want to apply to your text.
  - Check the **Strikethrough** box to display the text with a horizontal line through the center of the text.
  - Check the **Underline** box to display underlined text.
  - Click in the **Color** box to open the color palette and choose a color for the text.
7. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

## Aligning and Rotating Text in Custom Report Fields

The Object Properties dialog allows you to align and rotate the text within fields, as well as change the format of the font. For information about changing the font format, see [“Formatting Text in Custom Report Fields” on page 270](#).

### *To Align the Text in a Field*

1. Select the field that contains the text you want to align.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Click the **Text Attribute** tab to choose the alignment option for the text in the field.
4. Choose one of the six **Alignment** options to define how the text will be aligned within the boundaries of the field.
5. Check the **Allow Word Wrap** box to allow text to wrap onto another line if the text is wider than the boundary of the field.

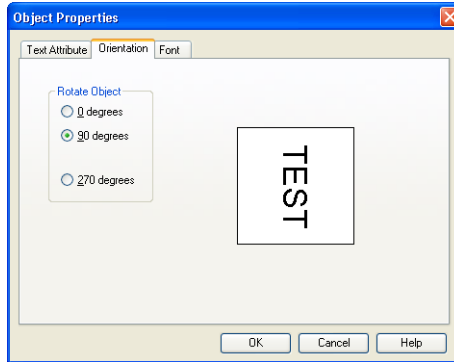
To limit the field to one line of text and cut-off any text that is wider than the boundary of the field, uncheck this box.

6. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.



### ***To Rotate the Text in a Field***

1. Select the field that contains the text you want to rotate.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Click the **Orientation** tab to choose the rotation option for the text in the field.
4. Choose one of the three **Rotate Object** options to the rotation of the text within the field.

As you make choices, the box on the right shows how the text will rotate in the field.

5. Click another tab to change other properties, or click **OK** to close the Object Properties dialog and apply your changes.

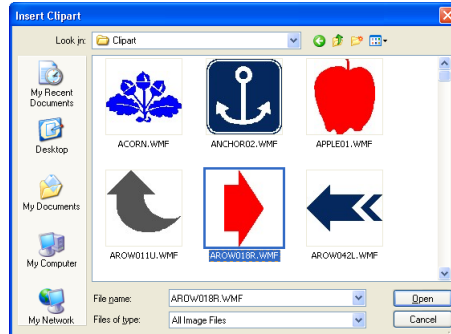
## Adding Clipart to a Custom Report

You can add clipart to any of the header, footer, or detail areas of your report. Custom reports can use BMP, DIB, ICO, GIF, JPG, PNG, WMF, and EMF graphic formats.



Clipart

1. Open the **Insert** menu and choose **Clipart**, or click the **Clipart** button in the Object Toolbar, to open the Insert Clipart dialog.



2. Navigate to a folder and choose the clipart file you want.
3. Click **Open**.
4. Position the cursor on the report where you want the clipart, and then click to place it.

If you want to make the clipart a specific size, you can click and drag when you place it.

You can click and drag the clipart to move it to any location on the report. To resize the clipart, click and drag one of the sizing handles.

## Adding Lines and Rectangles to a Custom Report

You can add lines and rectangles to any of the header, footer, or detail areas of your report.



Line  
Button



Rectangle  
Button

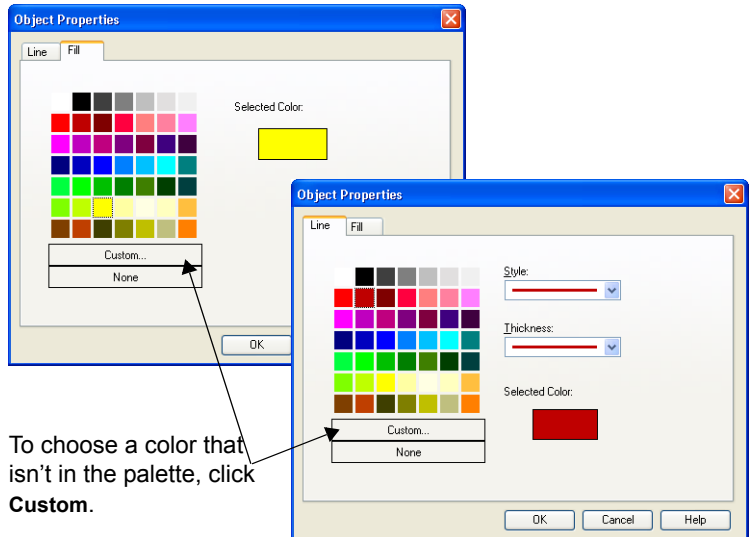
- To add a line, open the **Insert** menu and choose **Line** or click the **Insert Line** button in the toolbar, and then click where you want the line on the report.
- To add a rectangle, open the **Insert** menu and choose **Rectangle** or click the **Insert Rectangle** button in the toolbar, and then click where you want the rectangle on the report.

If you want to make the line or rectangle a specific size, you can click and drag when you place it.

You can click and drag the line or rectangle to move it to any location on the report. To resize the line or rectangle, click and drag one of the sizing handles.

## ***To Change the Attributes of a Line or Rectangle***

1. Select the line or rectangle on your report.
2. Open the **Format** menu and choose **Object Properties** to open the Object Properties dialog.



3. Choose the attribute you want to change.
  - If you want to change the style, thickness, or color of a line or the outline of a rectangle, click the **Line** tab.
  - If you want to change the color of the inside of a rectangle, click the **Fill** tab.
4. Choose the color from the palette or click **Custom** to create a custom color (see [“Choosing a Custom Color” on page 180](#)).

A preview of the color appears in the dialog.

To make the inside of a rectangle transparent, choose **None**.
5. Choose the style and thickness of the line or outline, if you're in the **Line** tab.
6. Click **OK**.

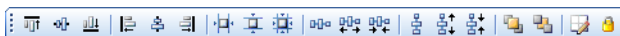
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## Aligning Objects on a Custom Report

You can align objects on the report using the grid or the features in the Format menu and Format Toolbar.

- To turn the gridlines off and on in the Design view, open the **View** menu and choose **Show Grid**.
- To have the fields and text boxes attach to the grid lines when you move them, open the **View** menu and choose **Snap to Grid**.

The Format Toolbar gives you quick access to alignment, sizing, and spacing options.



To use one of the options in the Format Toolbar, select one or more objects on your report, and then click a toolbar button to apply the option.

These same options are available in the **Format** menu under **Alignment**, **Sizing**, **Horizontal Spacing**, and **Vertical Spacing**.

If you want to place a row of fields in individual boxes, similar to a row of table cells, select the row of fields and then open the **Format** menu and choose **Format as Table Row** or click the **Format as Table Row** button in the toolbar.

To lock the objects on your report, so that they can't be moved or sized, select an object on the report and then open the **Format** menu and choose **Lock Fields** or click the **Lock Fields** button in the toolbar. To unlock the objects, repeat this procedure.

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## Grouping, Subtotaling, and Filtering Custom Report Data

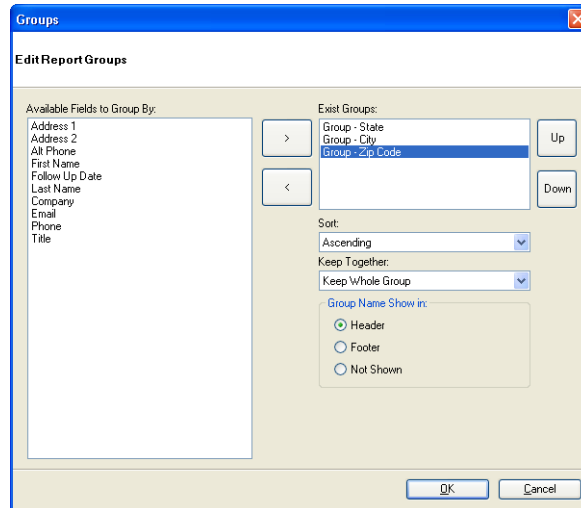
Group and subtotal the data in your records to define how the data is presented in the report. Apply a filter so that only particular records are included in your report.

Group, Subtotal, and Filter options are available in the Data Management menu and the Data Management Toolbar.

The reports in the **Shared Reports** list can be customized only by the database administrator.

## Selecting Groups for Sorting

In the Groups dialog, you can select the fields that you want to use for sorting the data in the report. To view the Groups dialog, open the **Data Management** menu and choose **Grouping** or click the **Report Groups** button in the toolbar.



To sort the report by a field, select the field in the **Available Fields** list and then click the upper arrow button between the lists to place the field in the **Exist Groups** list. To remove a field from the **Exist Groups** list, select it and then click the lower arrow button between the lists.

You can choose to sort **Ascending** or **Descending**, and to keep none, part, or all of the information together in the report.

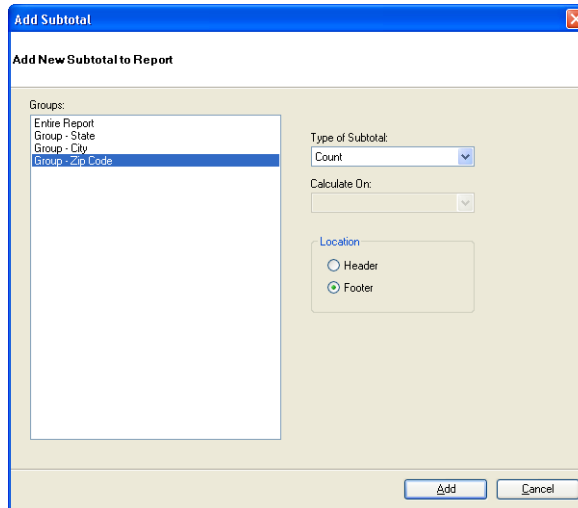
If you want the data from the sort field to appear in the header or footer of the group, choose the **Header** or **Footer** option. If you don't want the data to appear in the header or footer, choose **Not Shown**.

If you have more than one sort group, you can determine the order of the sort by selecting a group and clicking the **Up** and **Down** buttons to move the selected group earlier or later in the sort order.

After you finish defining your sort groups, click **OK**.

## Adding Totals and Subtotals

In the Add Subtotal dialog, you can select the sort groups that you want to use to show subtotals in the report. To view the Add Subtotal dialog, open the **Data Management** menu and choose **Add Subtotal** or click the **Add Subtotal** button in the toolbar.



To subtotal by a sort group in the report, select the sort group in the **Groups** list.

To add a grand total, select **Entire Report** in the **Groups** list.

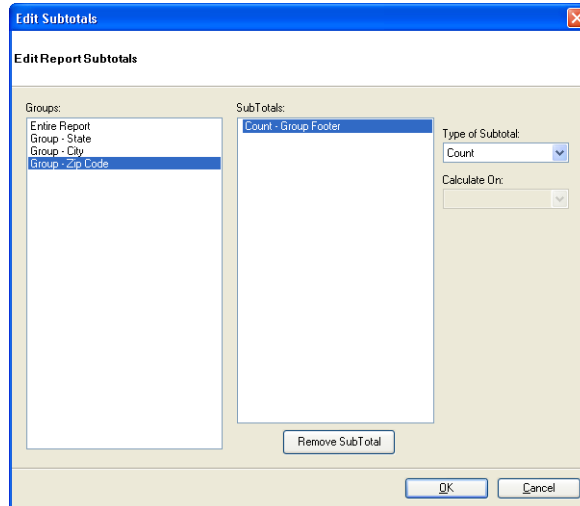
If you have numeric fields in your database you can choose to **Count** the number of records or subtotal the **Sum** of a numeric field by selecting the subtotal **Type** and the field to **Calculate On**. Only numeric and calculated fields appear in the **Calculate On** drop-down list.

Define where the total appears on the report by choosing the **Header** or **Footer** option.

After you finish defining your totals, click **Add**.

## To Edit Totals and Subtotals

In the Edit Subtotals dialog, you can change the properties of the sort groups that you want use to show subtotals in the report or remove subtotals from the report. To view the Edit Subtotals dialog, open the **Data Management** menu and choose **Edit Subtotals** or click the **Edit Subtotals** button in the toolbar.



To define a subtotal, select the sort group in the **Group** list and the subtotal in the **SubTotals** list, and then edit the subtotal using the options on the right. To edit a grand total, select **Entire Report** in the **Groups** list and the grand total in the **Grandtotals** list before editing the options.

If you have numeric fields in your database you can choose to **Count** the number of records or subtotal the **Sum** of a numeric field by selecting the subtotal **Type** and the field to **Calculate On**. Only numeric and calculated fields appear in the **Calculate On** drop-down list.

- To remove a sort group from the **SubTotals** list, select it and then click the **Remove SubTotal** button below the **SubTotals** list.
- To remove a sort group from the **Grandtotals** list, select it and then click the **Remove Grandtotal** button below the **Grandtotals** list.

After you finish editing your totals, click **OK**.

## Defining a Custom Report Filter

In the Filters dialog, you can define a filter for the report. To view the Filters dialog, open the **Data Management** menu and choose **Filtering** or click the **Report Filters** button in the toolbar.

The screenshot shows the 'Filters' dialog box with the 'Edit Report Filters' tab selected. At the top, there are three tabs: 'Simple', 'Standard', and 'Advanced', with 'Advanced' being the active tab. To the right of the tabs is a checkbox labeled 'Display All Records (No Filter)'. Below the tabs, there is a 'Filter Name:' field with a dropdown menu showing 'Local Area'. To the right of this field are four buttons: 'New Filter', 'Clear Filter', 'Delete Filter', and 'Copy Filter'. Below these buttons is a section titled 'Display records if:' followed by a grid of filter conditions. The grid has four rows of conditions. The first row shows 'City' matches 'Menlo Park'. The second row shows 'or' followed by 'City' matches 'Palo Alto'. The third row shows 'and' followed by 'Zip Code' start with '940'. The fourth row shows 'and' followed by 'Zip Code' start with '943'. Below these are three more rows with 'not in use' and empty fields. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

You can choose a **Simple**, **Standard**, or **Advanced** filter by clicking one of the tabs at the top of the dialog. The filters you define for custom reports are independent from the filters you define for the database, but the procedures for defining filters is very similar. For information about defining filters, see [“Filtering Records” on page 100](#).

If you want to use all of your data in the report without filtering, check the **Display All Records** box at the top of the wizard.

After you finish defining your filter, click **OK**.



---

## Previewing a Custom Report



Preview  
Button

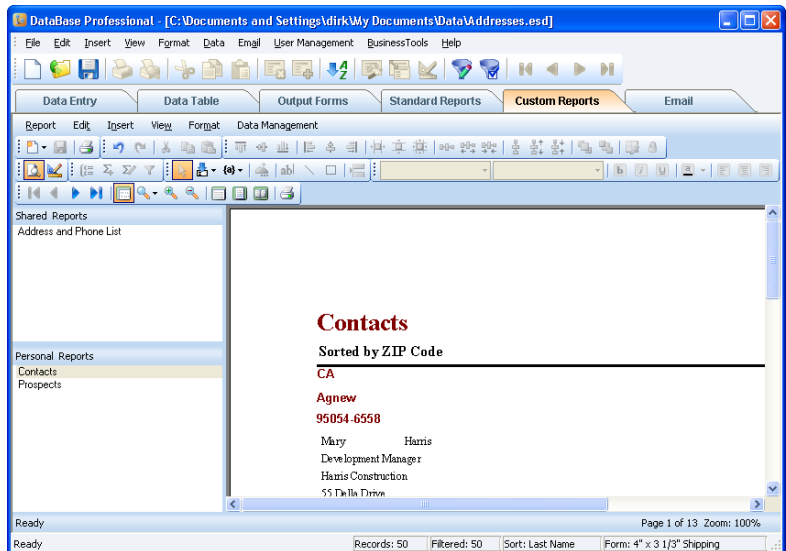


Design  
Button

You can switch between the design view and the preview of your custom report to see how you changes affect the way the report will look.

To switch between the Design view and the Preview, open the **View** menu and choose **Design** or **Preview**, or click the **Design** or **Preview** buttons in the toolbar.

The Preview toolbar allows you to navigate the pages of the report, change the viewing options, and print the report.



---

## Printing a Custom Report

When you finish defining your custom report, you can print the report. To open the Print dialog, open the **Report** menu and choose **Print** or click the **Print Report** button in the toolbar.

For information about using the Print dialog, see [“Printing Output Forms” on page 193](#).

Click **OK** in the Print dialog to generate and print your custom report.



# PROGRAM MANAGEMENT

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Managing DataBase Files	285
Managing Settings and Preferences	293
Updating DataBase	301



# Managing DataBase Files

---

## Overview

Using DataBase, you can backup your files, make a copy of your files, and export your data for another program to use. You can also update your personal information and your Administrator password.

---

## Backing Up Your Files

To keep from losing valuable information in the case of a computer failure, you should backup your database frequently.

Backup files can be created by the database administrator. The administrator can also restore the database from a backup.

### Creating a Backup

1. Open the database that you want to backup and login as **Administrator**.
2. Open the **File** menu and choose **Backup** to open the Save As dialog.
3. Locate and open the drive and folder where you want to save the backup file.

We recommend that you save the backup file on a Zip disk, CD, or other external storage medium.

4. Enter a name for the backup file if you want to change the name.  
DataBase names the backup using the name of the database file and the current date. For example, if your database is named **Addresses** and you're creating the backup file on **May 15, 2007**, the backup file is named `DBP_Addresses_20070515.bak`.
5. Click **Save** to save the backup file.

## Restoring From a Backup

Since restoring from a backup file can't be reversed, it's a good idea to backup the current database before restoring (see [“Creating a Backup” on page 285](#)).

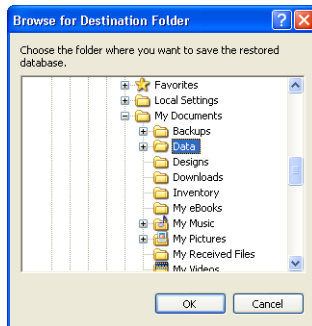
1. Open any database of which you're the administrator and login as **Administrator**.

DataBase allows you to restore to any database, even one that you don't have open. This allows you to restore to a database that might have corrupted data in it.

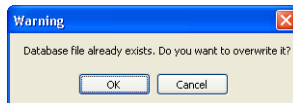
2. Open the **File** menu and choose **Restore** to open the Open dialog.
3. Locate and open the drive and folder where you saved the backup file.
4. Select the backup file you want to restore from.

DataBase names the backup using the name of the database file and the current date. For example, if your database is named **Addresses** and you created the backup file on **May 15, 2007**, the backup file is named `DBP_Addresses_20070515.bak`.

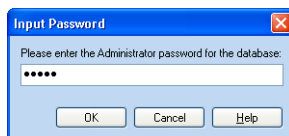
5. Click **Open** to open the Browse for Destination Folder dialog.



6. Select the folder where you want to save the restored database.
7. Click **OK** to open a Warning.



8. Click **OK** to open the Input Password dialog.



9. Enter your Administrator password and click **OK** to restore the database file from the selected backup.

---

## Copying Files

You can copy your file to another drive or folder on your computer, or just give it a new name. You might want to make a copy of your file if you want to create a new file that uses the same data or if you have forgotten your Administrator password.

When you copy a file, any changes you made to the old file will be saved to the new file.

The easiest way to make a copy of your file is to use the Save As dialog (see [“Making a Copy of Your File” on page 287](#)). After saving the file, the new file is open. To keep from making changes to the new file, open the old file again (see [“Opening Existing Files” on page 32](#)).

### Making a Copy of Your File

You might want to save a copy of your work under a different name or in a different location.

1. Open the **File** menu and choose **Save As**.

If you have applied a filter or selected records in the Data Table, the Save What dialog opens for you to choose one of the following options.

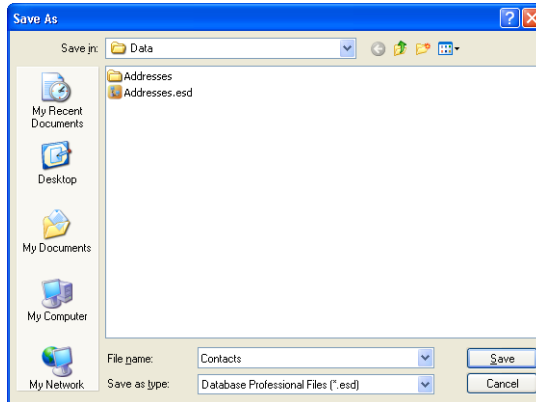
- |                         |   |
|-------------------------|---|
| <b>All Records</b>      | Saves all the records in the database   |
| <b>Filtered Records</b> | Saves only the filtered records, (see <a href="#">“Filtering Records” on page 100</a> )                     |
| <b>Selected Records</b> | Saves only the records you have selected, (see <a href="#">“Selecting a Group of Records” on page 108</a> ) |



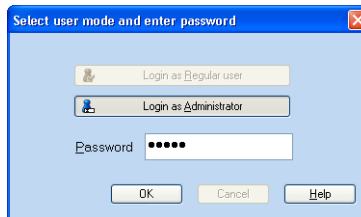
**NOTE:** To avoid losing your database, be sure to save a filtered records database or a selected records database with a name that is different from the original database name.

---

Choose the option you want and click **OK** to open the Save As dialog.



2. Click the **Save in** drop-down list to choose the drive and folder where you want to save the file.
3. Click in the **File name** box and type a name for the file.
4. Click **Save** to open the Select user Mode and Enter Password dialog.



5. Enter a password between zero and thirty characters.  
The password you enter in the Select User Mode and Enter Password dialog will be required each time you open the database as the administrator.
6. Click **OK** to save the new database.



## Transferring Files to Another Computer

You can use Windows Explorer to copy data files from one computer to another. For information about using Windows Explorer, see your Windows documentation.

Each DataBase file uses several support files and folders. To move your database to a different computer, you must also move the support files and folders.

When you create a new database, the name that you give to the database file is also given to a folder. This folder contains most of the supporting files for the database. There are also two files in the folder where you saved the database that have the following extensions:

- \*.esd
- \*.dbt

For example, if your file is named `Addresses.esd`, you would need to move the `Addresses` folder and the following files:

- `Addresses.esd`
- `Addresses.dbt`

If you've inserted any clipart into the forms in the file, you also need to copy the clipart files to the other computer. When you insert clipart into a form, DataBase stores only a reference to the file's location. Copy the clipart file into the `Clipart` folder that is located in the folder that contains the supporting files for the database. For more information about clipart, see [“Adding Clipart” on page 172](#).

---

## Creating New Files

To start a new DataBase file, open the **File** menu and choose one of the **New** options:

- |                                |   |
|--------------------------------|---|
| <b>New File From Template</b>  | Choose this option to open a new blank database using one of the DataBase templates (see <a href="#">“Choosing a Template” on page 44</a> ).  |
| <b>New Custom File</b>         | Choose this option to open a new blank database without using a template. You create all of the fields, forms, and reports (see <a href="#">“Creating a Custom Database” on page 45</a> ).  |
| <b>New with Current Design</b> | Choose this option to open a blank database using your currently opened file like a template. Any custom fields, forms, or reports you have added to the current file will be used in the new file. If you have deleted any forms from the current file, they’ll also be removed from the new file. |

For more information about creating a new database, see [“Setting Up a Database” on page 41](#).

---

## Exporting a File to Another Program

The Export feature lets you copy your DataBase data into a file format that can be used by other programs, such as delimited text format.

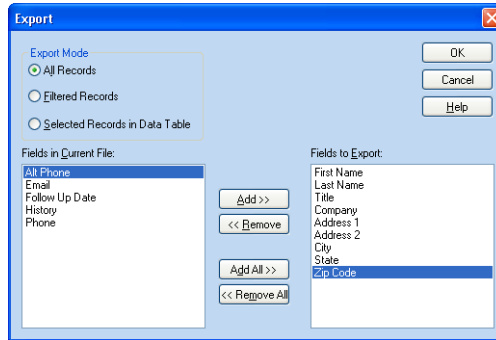
You can export the entire file, selected records, or selected fields.

If you want to export only some of the records, instead of all of them, filter the list so that only the records you want to export are displayed, or select the records that you want to export in the Data Table window.

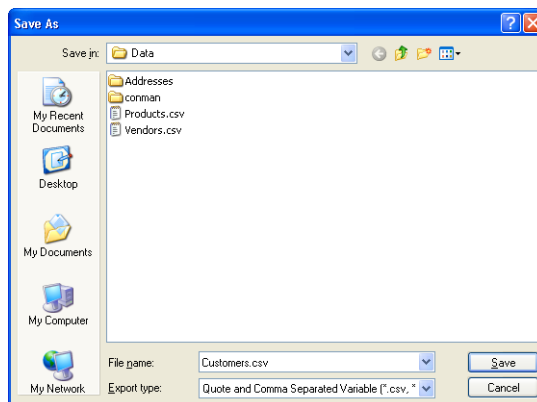
- For information about filtering your list, see [“Filtering Records” on page 100](#).
- For information about selecting records in the Data Table window, see [“Selecting a Group of Records” on page 108](#).

## Exporting the File

1. Open the **File** menu and choose **Export** to open the Export dialog.



2. Choose the Export Mode.
  - All records in the list
  - Only those records displayed in the current filter (see [“Filtering Records” on page 100](#))
  - Only the records selected in the Data Table (see [“Selecting a Group of Records” on page 108](#)).
3. Choose which fields to export:
  - To include a field in the export file, click the field name in the **Fields in Current File** list and then click the **Add** button.
  - To include every field in the current database, click the **Add All** button.
  - To remove a field that is already selected, click the field name in the **Fields to Export** list and then click the **Remove** button.
  - To remove all of the fields from the **Fields to Export** list, click **Remove All**.
4. Click **OK** to open the Save As dialog.



5. Choose the drive and folder where you want to store the exported file from the **Save in** list.
6. Type a name for the file in the **File name** box.

To make sure that the export file will be compatible with the other program, the file name should contain eight characters or less, with no spaces. For example, name the file mylist instead of myaddresses.
7. Use the **Export type** box to choose the format of the export file.

Unless you choose a different format, DataBase exports in a **Quote and Comma Separated Variable (\*.csv)** format, which works well in most cases. Choose the export format based on the software you're going to use to read the exported file. Check that program's documentation to see what formats it accepts.
8. Click **Save** to export the current database.

---

## Deleting Files

Each DataBase file uses several support files and folders. To delete your database, you must also delete the supporting files and folders.

When you create a new database, the name that you give to the database file is also given to a folder. This folder contains most of the supporting files for the database. There are also two files in the folder where you saved the database that have the following extensions:

- \*.esd
- \*.dbt

For example, if your file is named **Addresses.esd**, you would need to move the **Addresses** folder and the following files:

- **Addresses.esd**
- **Addresses.dbt**

### Deleting the Files

1. If DataBase is running, make sure the file you want to delete is *not* open.
2. Open Windows Explorer and locate the file you want to delete.
3. Select and delete the files and folders.

For more information about using Windows Explorer, see your Windows documentation.

# Managing Settings and Preferences

---

## Overview

Using DataBase, you can update your personal information and your Administrator password. You can also define program preferences.

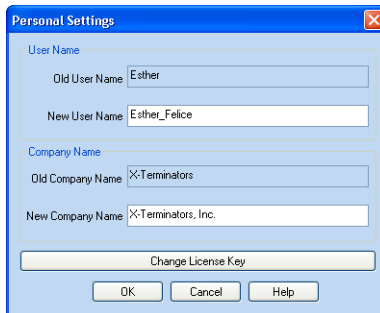
---

## Updating Personal Settings

To change your user name or correct your license key, open the **User Management** menu and choose **Personal Setting**.

If you want to change the password you use to login as Administrator, see [“Changing Your Administrator Password” on page 295](#).

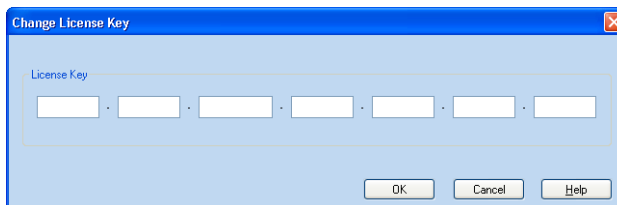
Changing your personal settings affects the login information for all database files, so DataBase needs to temporarily close the open database before opening the Personal Settings dialog.

The screenshot shows the 'Personal Settings' dialog box with a blue title bar and a close button. It contains two sections: 'User Name' and 'Company Name'. The 'User Name' section has 'Old User Name' set to 'Ether' and 'New User Name' set to 'Ether\_Felice'. The 'Company Name' section has 'Old Company Name' set to 'X-Terminators' and 'New Company Name' set to 'X-Terminators, Inc.'. Below these sections is a 'Change License Key' button. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Your current user name appears in the **Old User Name** box. Enter your new user name in the **New User Name** box. Your user name must be between one and twenty characters and can include only letters, hyphens, or underscores.

Your current company name appears in the **Old Company Name** box. Update your company name by typing in the **New Company Name** box.

To update your license key, click the **Change License Key** button to open the Change License Key dialog.

The screenshot shows the 'Change License Key' dialog box with a blue title bar and a close button. It features a 'License Key' section with a text area containing seven empty boxes separated by dots. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

For security purposes, your current license key doesn't appear in the dialog. To save the new license key, click **OK** to return to the Personal Settings dialog.

When you finish updating you personal settings, click **OK** and login to the database that was previously opened.

---

## Changing Your Administrator Password

You can change your Administrator password after you login to the database as Administrator. If you can't login to the database because you forgot your password, login as a Regular user and make a copy of the database. You can enter a new password when you create the new database (see [“Making a Copy of Your File” on page 287](#)).

### To Change the Administrator Password

1. Open the database to which you want to change the password and login as **Administrator**.
2. Open the **User Management** menu and choose **Change Admin Password** to open the Change Admin Password dialog.



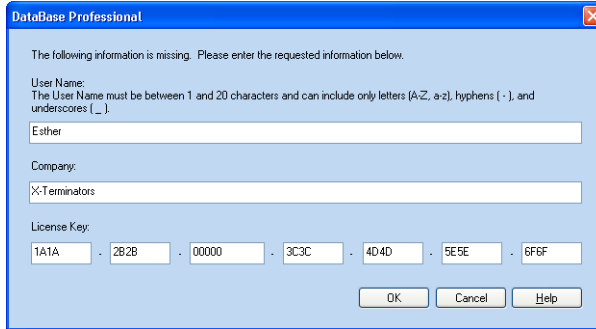
3. Enter your current Administrator password in the **Please enter old password** box.
4. Enter a new password in the **Please enter new password** box.
5. Enter the new password again in the **Please reenter new password** box.
6. Click **OK** to save the new password.

The new password you enter in the Change Admin Password dialog will be required each time you open the database as the administrator

---

## Updating Missing Information

Each time you start the program, DataBase checks your license information. If the license information can't be found, a dialog appears allowing you enter you user name, company name, and license key.

The image shows a Windows-style dialog box titled "DataBase Professional". Inside the dialog, the text reads: "The following information is missing. Please enter the requested information below." Below this, there are three sections: "User Name:" with a note "The User Name must be between 1 and 20 characters and can include only letters (A-Z, a-z), hyphens ( - ), and underscores ( \_ )." and a text box containing "Esther"; "Company:" with a text box containing "X-Terminators"; and "License Key:" with seven small text boxes containing the characters "1A1A", "2B2B", "00000", "3C3C", "4D4D", "5E5E", and "6F6F" separated by hyphens. At the bottom right of the dialog are three buttons: "OK", "Cancel", and "Help".

This can be caused by a number of different reasons:

- If you're using Windows XP or NT, each user profile is required to separately enter the license key before the program can be used by that user profile. This allows multiple users to use the same computer with their own separate licenses.
- If you recently restored your registry settings, the license information might have been removed.
- If you recently installed or uninstalled a program, the license information might have been altered or deleted.

Enter your user name, company name, and license key in the boxes and then click **OK** to save the information and start the program.

For more information about entering your license key, see [“Identifying Your License”](#) on page 20.



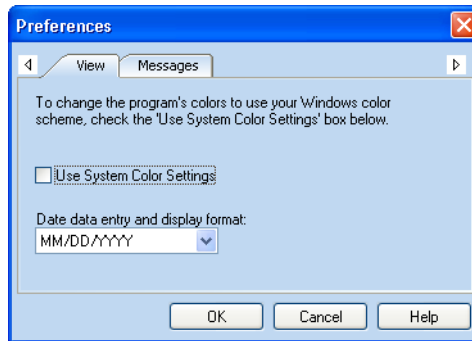
---

## Changing Program Preferences

You can change the color settings to use your system colors instead of the colors that come standard with DataBase. You can also choose the data entry and display format of date fields. If you want to restore a helpful message that you turned off, check the box in the **Message** tab.

### Changing the Color Settings

1. Open the **File** menu and choose **Preferences** to open the Preferences dialog.



2. Click the **View** tab to display the view preferences.
3. Check the **Use System Color Settings** box.

If you want to use the colors that come standard with DataBase, uncheck this box.

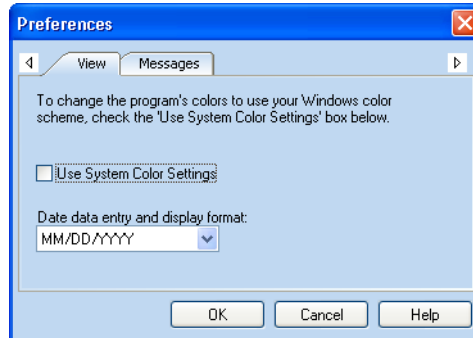
4. Click **OK**.

You can change your system colors using the Windows Display Properties dialog (see your Windows documentation).

## Changing Date Field Preferences

Although date fields print in your system-defined format, the data entry format can be changed to match your preferred method for entering dates.

1. Open the **File** menu and choose **Preferences** to open the Preferences dialog.



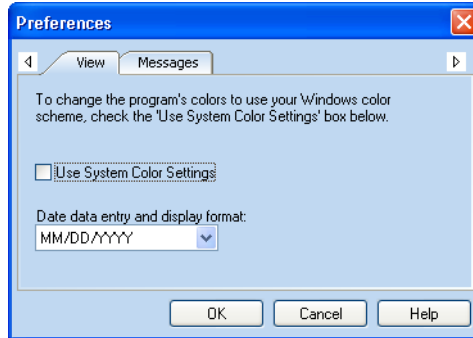
2. Click the **View** tab to display the view preferences.
3. Choose your preferred date format from the **Date data entry and display format** drop-down list.
  - To enter the month before the day of the month, choose **MM/DD/YYYY**.
  - To enter the day of the month before the month, choose **DD/MM/YYYY**.
4. Click **OK**.

You can change the printed output for dates using the Windows Control Panel (see your Windows documentation).

## Viewing Helpful Messages

Helpful Messages are a feature of DataBase designed to assist you in the functions of the program. These are popup windows with tips about using the program and additional information about how to use the feature.

1. Open the **File** menu and choose **Preferences** to open the Preferences dialog.



2. Click the **Message** tab to display the message preferences.
3. Check the **Turn on Helpful Message** box.  
If you don't want to display a helpful message, uncheck the box.
4. Click **OK**.

### ***To Turn Off Helpful Messages***

When a Helpful Message appears, the option to turn off the message is available at the bottom of the message. To turn off the helpful message, check the box at the bottom of the message and click **OK**.

If you want to turn off all Helpful Messages, uncheck the box on the **Messages** tab.



# Updating DataBase

---

## Overview

MySoftware periodically improves DataBase—adding features, making changes based on customer requests, and fixing problems. When these updates (also known as patches) are available to you, Avanquest Update allows you to quickly download and install these updates and program patches.

Avanquest Update provides you with a list of available downloads, allowing you to update everything or choose the updates that you want.

We recommend running Avanquest Update immediately after installing DataBase, to check for updates that weren't included with your version.

---

## Running Avanquest Update

The Update Download Wizard walks you through the process of updating DataBase.

1. Make sure your computer is connected to the Internet.  
If you access the Internet using a modem, you should already be dialed in, or your browser should be set up to automatically dial in.
2. Start DataBase.
3. Open the **Help** menu and choose the **Update Software** to start the Update Download Wizard.
4. Click **Next** to search for available updates.
5. Click **Next** to view a list of available updates.  
If no updates are available, click **Finish** to close the Wizard.
6. Check the box next to the updates that you want to download and install.
7. Click **Next** to download the selected updates.
8. Click **Install** when the download is completed.
9. Click **Finish** and follow the on-screen instructions to install the downloaded updates.

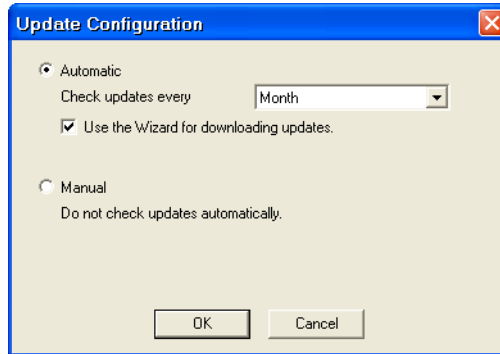
After installing the updates, you might be asked to restart your computer. After you've restarted your computer (if necessary), the changes will appear in DataBase the next time you run the program.

---

## Automatically Checking for Updates

You can set DataBase to check for updates at regular intervals when you're connected to the Internet.

1. Open the **Help** menu and choose the **Configure Updates** to open the Update Configuration dialog.



2. Chose one of the options:
  - **Automatic** downloads available updates at the interval you choose, and then notifies you to install them.

To determine how often to automatically check for updates, choose the option you want from the **Check updates every** drop-down list.

To have the Updates Wizard assist you with the updates, check the **Use the Wizard for downloading updates** box.
  - **Manual** doesn't check for updates unless you begin the process (see ["Running Avanquest Update" on page 302](#)).

If you chose the **Manual** option, Avanquest Update won't use your selections under the **Automatic** option.
3. Click **OK**.





# REFERENCE

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<b>Helpful Hints and Troubleshooting</b>	<b>307</b>
<b>Glossary of Terms</b>	<b>323</b>
<b>Index</b>	<b>327</b>
<b>Technical Support Policy</b>	<b>337</b>



# Helpful Hints and Troubleshooting

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## Using Shortcuts

There are often several ways to perform tasks in DataBase. The user's guide and online help describe the most straight-forward way to perform a program option, but might not describe the fastest way.

DataBase offers toolbars, shortcut menus, and keyboard shortcuts so you can quickly perform some common tasks.

### Using Toolbars

The easiest way to speed up your work is to use the toolbar buttons. Most of the instructions tell you how to perform a task using the menu bar at the top of the window. However, there are toolbar buttons for some features that can save you a few mouse clicks.

When available, toolbar buttons are shown next to the instructions for the task.

### *To Set Toolbar Options*

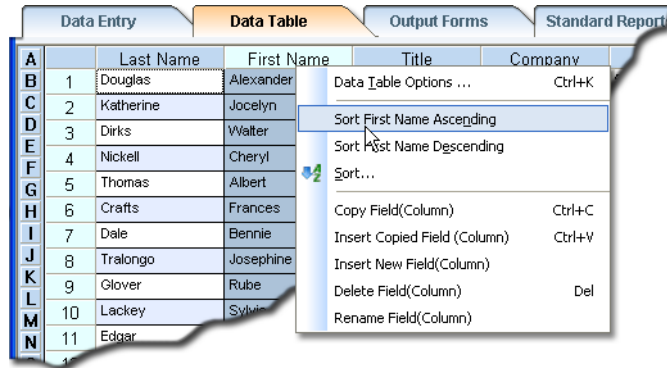
You can turn the toolbar on or off. All of the features available in the toolbar can be accessed from the menus. You can also turn the ToolTips on or off.

1. Open the **View** menu and choose **Toolbar** to open the toolbar dialog.
2. Choose the options you want.
3. Click **OK**.

## Using Shortcut Menus

Shortcut menus are another way to speed up your work. Shortcut menus open when you right-click areas of the screen.

Different shortcut menus open, depending on where you click.



To choose an item from a shortcut menu, click on it.

## Using Keyboard Shortcuts

Keyboard shortcuts offer quick ways to perform some tasks without using your mouse. For example, to open another DataBase file, you can press CTRL+O (hold down the CTRL key and press O) instead of opening the **File** menu and choosing **Open**.

Several DataBase keyboard shortcuts are listed below. Some of these shortcuts are the same as for other Windows programs.

Create a new DataBase file using a template	CTRL+N
Open an existing DataBase file	CTRL+O
Save the current file	CTRL+S
Undo the last action	CTRL+Z
Create a new record in your database	CTRL+R
Set the display and printing options for the Data Table	CTRL+K
Preview the Data Table in Portrait orientation	CTRL+T
Preview the Data Table in Landscape orientation	CTRL+L
Copy the selected text or object	CTRL+C
Cut the selected text or object out of the form	CTRL+X
Paste the Cut or Copied item into a new location	CTRL+V
Use the Ditto Field feature	CTRL+D
Open the Find dialog	CTRL+F
Find the next occurrence	F3
Open the Replace dialog	CTRL+H
Exit DataBase	CTRL+Q

---

## Form Design Hints

### Adding Curved Lettering to Your Form

You can add special effects to your forms by taking advantage of the OLE capability of DataBase. For example, you can add a Microsoft WordArt object to your label and edit it right on your form design.

For more information about adding OLE objects to your forms, see [“Adding Objects From Another Program” on page 181](#).

### Adding Backgrounds or Watermarks

Place a background image on your form. For information about adding a background image, see [“Creating a Background Image” on page 170](#).

When adding backgrounds or imitation watermarks, make sure that the text or graphic you’re using is a light enough color that it doesn’t interfere with the foreground objects on your label. You can lighten an image using the Advanced Configuration dialog (see [“Adjusting the Brightness of Clipart” on page 175](#)).

You can have greater control of background images on your label by adding the text or graphic you want to use for the background, and then sending it to the back of the object stacking order. For information about the object stacking order, see [“Changing the Object Stacking Order” on page 145](#).

### Calculating a Percentage

When you want to display a numeric value as a percent, you can create a numeric field using a Percent Output Format. The value you enter in the numeric percent field will appear as a percent in the print out.

When you want to use a numeric percent field in a calculated field formula, you need to create a formula that will calculate the percent value. For example, if you wanted to create a field that calculates the total loan amount using simple interest, you could follow the steps below.

1. Create a **Currency** field for the principal.
2. Create a **Numeric** field for the interest rate with a **Percent** Output Format.
3. Create a **Calculated** field for the total loan amount with a **Currency** Output Format.
4. Create the following formula to calculate the total loan amount:

```
((<<Principal>>*(<<Interest Rate>>/100))  
+<<Principal>>
```

*Only the database administrator can create new fields and modify their properties.*

## Changing the Background Color of Your Form

If you have a color printer, you can create colored labels on white stock. Simply add a rectangle or circle to your label, size it to fit your label, and then change the fill color to the color you want the label to be.

Make sure the rectangle or circle is at the back of the object stacking order.



**NOTE:** If part of your label is outside of the printable area for your printer, that part of the label won't be colored by your printer. To keep the rectangle or circle within the printable region, right-click it and choose **Border** from the shortcut menu.

- For more information about adding rectangles or circles to your form, see [“Drawing Rectangles and Circles” on page 177](#).
- For information about the object stacking order, see [“Changing the Object Stacking Order” on page 145](#).
- For information about adding a background image to your form, see [“Adding a Background Image” on page 170](#).

## If the Outline of the Form Disappears...

If you place a picture or filled drawing object on your form that extends beyond the edge of the form, it might cover up the edge of the form.

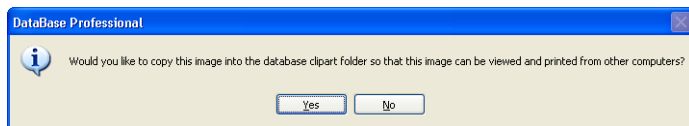
To define the edge of a form that is obscured:

1. Temporarily move or remove the picture or drawing object that hides the form edge.
2. Draw lines, rectangles, or circles on the edge of the form.  
Be sure to choose **None** for the fill color for any of these drawing objects.
3. Restore the picture or drawing object that you removed in **Step 1** to your form.
4. Open the **Format** menu and choose **Placement > Send to Back**.  
The drawing objects that you added in step 2 will define the edge of the form on top of the object you restored in step 3.
5. Finish designing your form.
6. Delete the drawing objects that you added in step 2, so that they won't print on your form.

## If Clipart Doesn't Appear on the Form...

When you add clipart to a form, DataBase remembers the location of the clipart file, but doesn't actually add it to your DataBase file. This saves disk space, but DataBase won't be able to find the clipart file if it's moved or if you copy your database to another computer without also copying the clipart.

If you're the database administrator and you created a shared form, you should save the image file in the database clipart folder when adding it to the form.



If you click **Yes**, a copy of the clipart file will be placed in the database clipart folder. The original file will remain unchanged.

## If Clipart is Unreadable...

If you have selected clipart from a graphic format that isn't supported by DataBase, it might not display or print properly. DataBase supports BMP, RLE, DIB, GIF, TIF, PCX, DCX, WPG, JPG, IMG, TGA, WMF, and EPS graphic formats (LZW encoded TIF files aren't supported).

If you want to use clipart of an unsupported format, try to convert it to one of the supported formats with a graphics conversion program.

## If Colors Don't Look Right...

Clipart colors might not appear accurately on your screen. DataBase uses the color palette of the original clipart to draw the screen images, if your video driver will support it. If you only have a 256-color video driver, only 256-colors will be displayed. Check the documentation that came with your video card and your monitor. You might be able to change your system settings to display more colors using the Windows Control Panel.

Likewise, a picture will print on your labels using the color palette of your printer. If your printer has a 256-color palette, then a 256-color picture will print accurately.

Screen colors are usually different than printed colors. The colors on your monitor are created with red, green, and blue light, while the colors on a printed page are created with dye or pigments. The best way to know what the colors will look like on printed output is to actually print on paper.

## If Objects are Difficult to Select...

Objects might be difficult to select if they're overlapping, or if one object is placed inside of another.

### *To Select Overlapping Objects*

Objects which overlap or are touching each other might be difficult to select. You might notice that the most recently placed object is easiest to select. This is due to the stacking order of the objects. Each new object is placed in a layer above the other objects on the screen (see [“Changing the Object Stacking Order” on page 145](#)).

### *To Select an Object Within Another Object*

You might not be able to select an object that has been placed within a larger object you have already selected. This might be true even if the smaller object is stacked in a layer above the larger object. To select the smaller object, you'll need to deselect the larger object by clicking on the work area away from the object.

If you would like to select both objects at the same time:

1. Move the larger object to a layer below the smaller object.
2. Cancel the selection of the larger object by clicking on the work area away from the object.
3. Select the smaller object, and then hold the SHIFT key down and click the larger object.

You can now move both objects as a group.

## If Toolbar Buttons and Menu Options are Dimmed...

Whenever a tool or feature isn't available for you to use with a selected object, the related button or menu item is dimmed. For example, if you're in the Data Table window, the **Change Form Size** option in the **Format** menu is dimmed, since you need to be in the Output Forms window to open the Change Form Size dialog.

## If a Text Box is Too Big and You Can't Resize it...

A text box is designed to show all of the text that has been entered into it. If there seems to be a lot of blank space at the bottom of a text box, and you can't reduce the height of the box, you might have added blank lines by pressing the ENTER key.

To remove the blank lines allowing you to resize the text box, click in the text box to place the cursor at the bottom of the text box, and then press BACKSPACE until the cursor reaches the end of your text. This deletes the extra lines and allows you to resize the text box.



---

## Printing Hints

### Printing Return Address Labels

To print return address labels using DataBase:

1. Choose or create a form that has your return address entered into a text box (see [“Adding a Return Address” on page 159](#)).
2. Open the **File** menu and choose **Print > Active Output Form** to open the Print dialog.
3. Set the **Print Range** to print only one record by entering the same record number in both the **From** box and the **To** box. For example, **From 1 To 1**.
4. Set the **Number of Copies** to the number of labels you want to print.  
If you're printing a full page of labels, enter the number of labels on the page.
5. Click **Print** to begin printing.

### Printing Multiple Copies of One Label

1. Open the **File** menu and choose **Print > Active Output Form** to open the Print dialog.
2. Set the **Print Range** to print only one record by entering the same record number in both the **From** box and the **To** box. For example, **From 22 To 22**.  
If you have already selected the record in the Data Table window, you can choose **Selected Records in Data Table**, instead.
3. Set the **Number of Copies** to the number of labels you want to print.  
If you're printing a full page of labels, enter the number of labels on the page.
4. Click **Print** to begin printing.

## Resuming an Interrupted Print Job

If your printer jams or you run out of labels, you can resume printing from where you left off.

1. Open the **Edit** menu and choose **Find Record** to find the last record that was printed correctly (see “[Finding a Specific Record](#)” on page 87).
2. Open the Data Table window by clicking the **Data Table** tab.
3. Click the record number for the first record you need to print. Then, hold down the **SHIFT** key and click the number for the last record you need.  
  
Every record between the first and last record you clicked is highlighted in the Data Table.
4. Open the **File** menu and choose **Print > Active Output Form** to open the Print dialog.
5. Set the **Print Range** to **Selected Records in the Data Table**.
6. Click **Print** to resume printing.

## Calibrating Your Printer for CD Labels

CD labels are different from other types of labels, since there is more than one type of label on each sheet. DataBase defines only two large rectangular labels per sheet that includes the CD and spine labels within it.

If you need to re-calibrate your laser or ink-jet printer for printing on CD labels, use a straight-edge, such as a ruler, to draw a line to extend the right edge of the lowest spine label.

Print the alignment grid on this sheet. Use the bottom of the lowest spine label for the vertical measurement and the line you have drawn for the horizontal measurement (see “[Calibrating Sheet-Feed Printers](#)” on page 199).

## Updating Printer Drivers

If you need to update your printer driver, contact your printer’s manufacturer or check their Web site. There are a number of places to help you get current printer drivers:

- Microsoft’s Web site: <http://www.microsoft.com>
- The Web site of the printer’s manufacturer
- Local computer stores

To install a printer driver, use the Windows Control Panel (see your Windows documentation).

## Using Sheet-Feed Labels

When printing with a sheet-feed printer, keep in mind that there is a printable and a non-printable region on a page. The non-printable region extends about .125" to .5" all around the edge of the page. The width of the non-printable region varies from printer to printer.

To help you see if objects are within the printable area, the Preview Window displays a dotted line around the boundary of the printable region (see [“Previewing Your Form” on page 195](#)).

If some of your objects are being clipped by your printer, use the Output Forms window to add a border (see [“To Place a Border Around the Edge of Your Form” on page 177](#)).

Borders are designed to fit within the printable area of a label. Move your objects, so that they’re inside of the border. The border can be deleted after you have moved the other objects if you don’t want it to print.

## Using Photocopier Labels

Another common problem is using photocopier labels in your printer. Sheet-feed printers need a margin at the top and the bottom of the label sheet to make room for the non-printable region. The label sizes included with DataBase are designed for laser and ink-jet printer labels, which includes this margin. The program also automatically calculates the number of labels on a page based on sheet-feed label styles. If the number of labels per page doesn’t match, or if there is no margin at the top and bottom of the page, you’re probably using photocopier labels.

Also, photocopier labels aren’t designed for the heat and bending of laser and ink-jet printers; they might peel off and jam your printer.

## Using Form-Feed Labels

If rows of labels are being skipped when you print, you probably have an old or defective printer driver.

To fix the problem, contact your printer manufacturer or Microsoft and obtain a new printer driver. Libraries of many printer drivers are also maintained on many online services (see [“Updating Printer Drivers” on page 314](#)).

## If Data Doesn't Print...

There are several reasons why data might not print on your forms.

- If everything is printing except a particular field, make sure that all of the fields that you want to print are placed on the form that appears in the Output Forms window.
- Make sure that you're printing the correct form. For example, you might have chosen to print the **Data Entry Form** instead of the **Active Output Form**.
- If entire records didn't print, you might have set filter criteria that didn't include those records (only displayed records can be printed). See if the records are displayed by opening the **Edit** menu and choosing **Find Record**, or by browsing the Data Table. If they aren't displayed, change the filter criteria to include the records you want (see "[Filtering Records](#)" on page 100).
- If records weren't included in the **Print Range** entered in the Print dialog, they won't print.
- If data is cut off from the bottom of the printout, the data might extend into the non-printable region for the sheet. Because of mechanical limitations, every printer has some areas on a page where it can't print. The size of the non-printable area depends on your type of printer. You can work around this by reducing the number of records that DataBase prints on each sheet.

### *To Reduce the Number of Records that Print on a Sheet*

1. View your form design by clicking the **Output Forms** tab.
2. Open the **Format** menu and choose **Change Form Size**.  
The number of records in the current form is listed in the **Sheet Preview** box.
3. Click the **Custom** button in the Change Form Size dialog to create a custom form size.
4. Enter a name for the custom form size in the **Description** box.
5. Reduce the **Down** value in the **Number of Labels on Sheet** box by one.  
For example, if the original label printed two across and seven down, the new label should print two across and six down.
6. Click **OK** to return to the Change Form Size dialog.
7. Click **OK** to close the Change Form Size dialog.
8. Print a test page to see if your data prints correctly.

## If Postal Barcodes Don't Print...

There are two reasons why postal barcodes might not print:

- There must be a postal barcode field on the form that appears in the Output Forms window (see [“Adding a Postal Barcode” on page 184](#)).
- A postal barcode won't print unless the address contains a ZIP+4 Code (nine digits). If the ZIP Code only has five digits, the postal barcode won't print.

## If Color Doesn't Print or Prints Incorrectly...

If you're having problems printing color, you might need to update your printer driver. Check with the manufacturer of your color printer to make sure you have the most current version of the printer driver.

## If Grays are Printed as Black...

On some black and white printers clipart grays are printed correctly while drawing objects created with DataBase print only in black and white. This might be a problem with your printer driver, or you might just need to change your graphics printing options.

- For information about the graphics printing options for your printer, see your printer's documentation.
- For information about updating your printer driver, see [“Updating Printer Drivers” on page 314](#).

## If Data is Printed with Blank Spaces Between Fields...

If your data fields are placed next to each other in the Output Forms window, your form might still print with blank space around the fields. This is because the information you enter into a field might not be the same length in every record. For example, if you were making a list of mailing labels, some people will have long first names (like Josephine) while others will have short first names (like Sal). Also, you might leave one or more fields blank, such as a business title or second address line.

To suppress blank lines and spaces between fields, use an alignment box. For each record, the lengths of the data fields are adjusted to match the length of the data entered, and a single space is placed between each data field and text box on a line. If a line contains no information, it's removed and the lines below are moved up to fill the space (see [“Using an Alignment Box” on page 150](#)).

## **“Unable to set the printer for the currently-selected label stock” message**

This message appears for one of two reasons.

- There is a mismatch between the type of printer that was last used for printing and the type of form that is selected now. For example, if you choose to print your data on a pin-feed label, but you used a laser printer the last time you printed something, this message appears.
- DataBase doesn't recognize that you're using a pin-feed printer. This occurs because some printer drivers don't send feedback to DataBase, and DataBase chooses a laser printer type in this case.

To fix the problem, do one of the following things:

- Choose another printer.
- Choose a different type of form.
- Make sure that the type of printer is the same as the form type, and then print your data anyway.

### ***To Choose Another Printer***

1. Click **OK** in the message box.
2. Choose another printer from the **Name** drop-down list in the Print dialog.

If no other printers are listed, then there are no other printers installed in Windows. For information about installing printers, see your Windows documentation.

3. Click **Print** to print your data.

### ***To Choose A Different Form***

1. Click **OK** in the message box.
2. Click **Cancel** in the Print dialog.
3. Click the **Output Forms** tab to view the Form Library in the Output Forms window.
4. Choose a form that is designed for the type of printer you'll use.
5. Open the **File** menu and choose **Print > Active Output Form** to print your data in the new form.

---

## File Management Hints

### Using a Customized Template With a New File

Rather than spend time creating a new form design, you might want to use a custom form that you have designed as a template. Open your custom database and then open the **File** menu and choose **New With Current Design**. A new database file is created with the design from your custom template in place. You can add records to your new database.

### Making a Backup of Your DataBase File

To make a backup copy of your DataBase file on your computer or on a removable disk, open the **File** menu and choose **Backup**, and then choose where you want to save the backup file.

Only the database administrator can create a backup of the database.

For more information about making a backup copy of your DataBase file, see [“Backing Up Your Files” on page 285](#).

### Quitting the Program

To close the program, open the **File** menu and choose **Exit**.

Your data and designs are automatically saved while you work with the program.

### Uninstalling the Program

To remove the DataBase program from your computer:

1. Open the **File** menu and choose **Exit** to exit DataBase.
2. Click the Windows **Start** menu and choose **Settings > Control Panel** to open the Windows Control Panel.
3. Double-click the **Add/Remove Programs** icon to open the Add/Remove Programs dialog.
4. Choose **DataBase Professional** from the list of programs.
5. Click the **Add/Remove** button.

The program files for DataBase are removed from your computer, but your database files aren't. If you reinstall the program later, your files will still be available to open.

## If You Forgot Your Administrator Password...

You can't retrieve a forgotten administrator password.

If you can't login to the database because you forgot your password, login as a Regular user and make a copy of the database in another folder or using another name. You must enter a new password when you create the new database (see [“Making a Copy of Your File” on page 287](#)).

You'll need to recreate your shared form designs and shared reports. In addition, personal form designs and personal reports from other users will no longer work with the copied database and will need to be recreated.



**NOTE:** Don't save the copy of your database in the same folder and using the same name as the original database, as this might cause you to lose all of your data.

---

## If a DataBase File Won't Open...

There are several reasons why a DataBase file won't open:

- [Someone Else has the File Open](#) (see below).
- [The File is Read Only](#) (see page 321).
- [There is a Conflict with a Shared Program File or System File](#) (see page 321).
- [Some of the Supporting Files Can't be Found](#) (see page 321).
- [One or More of the Data Files Have Been Corrupted](#) (see page 322).

### ***Someone Else has the File Open***

DataBase is designed to be used simultaneously by more than one user. However, when the Administrator is using the database, no other users can be using it at the same time. If you want to open a database as the Administrator, make sure that no other users have the database open. If you want to open the database as a Regular User, make sure that the Administrator doesn't have the database open.



### ***The File is Read Only***

To open a DataBase file, you need to be able to save your work in the location where the file is currently saved. If the file has been saved on a CD or on a network drive on which you don't have write access, the file won't open. Before you can open the file, you need to transfer the main DataBase file and all of the supporting files to a drive on your computer or network where you're able to save changes (see [“Transferring Files to Another Computer”](#) on page 289).

### ***Some of the Supporting Files Can't be Found***

When you save a DataBase file, the program generates the main file and several supporting files that work together to create your database, forms, and reports. If any one of these files has been renamed, moved, or deleted, you won't be able to open the database. If you've used Windows Explorer or MyComputer to alter the main file or one of the supporting files, restore the file to the name and location where it was before you altered it. If you've deleted it, you might be able to restore it from your Windows Recycle Bin. For more information about the supporting files for DataBase, see [“Transferring Files to Another Computer”](#) on page 289. If you aren't able to restore the supporting files, you can import your data from the main file into a new file. This will allow you to still use your data, but your forms and reports will be lost. For more information about importing data, see [“Importing Data From Other Programs”](#) on page 63.

### ***There is a Conflict with a Shared Program File or System File***

If you have a conflict with a shared program file or system file, you might need to uninstall and reinstall the program. For information about uninstalling DataBase, see [“Uninstalling the Program”](#) on page 319.

## ***One or More of the Data Files Have Been Corrupted***

Typically, database corruption is caused by some kind of interruption in the program's save process. This can occur if there is a power outage or power spike while the program is open. Data can also be corrupted if another program crashes or Windows shuts down while DataBase is still open.

If you can't open a database or the program crashes when a specific database is open, there might be corrupted data in that database.

The best insurance against corrupted data is regular backups of your DataBase files. If you suspect data corruption, you can restore your data from your backup. DataBase has a built-in backup utility that makes it easy to backup and restore your data. For more information, see [“Backing Up Your Files” on page 285](#).

If you don't have a usable backup file, you can import your data into a new database. When you create the new database, don't use the **New with Current Design** option, since this might bring the corruption problem into your new database. If you've created custom fields in the database, you should re-create the same custom fields in the new database before importing the data.

- To create a new database, see [“Creating New Files” on page 290](#).
- To import your data, see [“Importing Data From Other Programs” on page 63](#).
- To re-create your custom fields, see [“Creating a New Field” on page 54](#).

If you continue to have corruption problems with the new file, you need to export the data to a .csv file and then import the data from the .csv file into a new database. For information about exporting data, see [“Exporting a File to Another Program” on page 290](#).

If you aren't able to use DataBase to export your data, you can use Microsoft Excel to open your main DataBase file and then save the data in a .csv file. When you use Excel to open the main DataBase file, choose the **All Files (\*.\*)** option in the **Files of Type** drop-down list. Your main DataBase file has an .esd extension. For information about opening and saving files using Excel, see your Excel documentation.

# Glossary of Terms

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## Alignment Box

Alignment boxes keep the fields and text boxes in your forms packed together, so that blank fields don't cause blank lines in your forms. After you place an alignment box on your form, you can add text objects to the box by clicking and dragging them in. The properties of the alignment box affect the properties of the fields and text boxes inside of it.

## Aspect Ratio

Aspect ratio is the ratio between the height and width of an object. When you maintain the aspect ratio of an object, you keep it from looking squeezed or stretched when you resize it. To maintain the aspect ratio of clipart or a shape, hold the **SHIFT** key down when you resize it.

## Check Box

Check boxes are placed next to dialog options that you can switch on or off. The database administrator can also add a check box field to the database.

- A marked check box either has an **X** or check mark inside of it.
- A cleared check box is empty.

## Click and Drag

Click and drag is a technique used to move objects or highlight text. Position the cursor over the object or text, and then click and hold down the left mouse button. Move the cursor to a new position, and then release the mouse button.

## Clipart

Clipart refers to pictures or graphics created in another program that can be placed on your form. Add clipart to your form in the Edit Data Entry Form or Output Forms window. The clipart prints exactly the same with every record.

## Clipboard

The Clipboard is where Windows temporarily stores information or objects you cut or copy, allowing you to paste it into another location. The contents of the Clipboard are overwritten each time you cut or copy.

## Delivery Point

When DataBase imports records from certain programs, a Delivery Point field might be present. The Delivery Point data can be encoded along with the ZIP+4 information to form a POSTNET barcode.

DataBase contains a Delivery Point field that you can match to the Delivery Point field from an address list that you import. The Delivery Point field is hidden and can't be edited using DataBase.

## Drive Letter

Each of the drives on your computer has a letter of the alphabet assigned to it. For example, your floppy drive might be drive A, your hard drive might be drive C, and your CD-drive might be drive D. If you aren't sure of the drive letters for your computer, double-click the **My Computer** icon on your Windows desktop. The My Computer folder opens and displays the icons and letters for all of your disk drives.

## Export

Save your DataBase data in a format that another program can use by exporting it. To export your data, open the **File** menu and choose **Export**.

## Field

A field serves as a place holder in your form for information that can change from record to record. Place fields on your Data Entry form in the Edit Data Entry Form window. Enter information directly into each field in either the Data Entry or Data Table window.

## Form-Feed

Form-feed refers to a type of printer that uses a roll or box of paper or labels. These printers are sometimes referred to as "pin-feed" or "tractor feed." Dot-matrix and daisy wheel printers are usually form-feed type. *See also* [Sheet-Feed](#).

## Grid

The grid is an alignment tool that helps you place objects in horizontal or vertical alignment. The grid can be displayed on the screen as dotted or solid lines. You can visually align objects to the grid or have objects “snap” to the nearest grid corner when you move them.

## Import

When the database administrator imports data from another program into DataBase, the records are copied from the selected file and added to the end of the current DataBase list. The original file remains unchanged.

## Increment

To increment is to increase the value of a number. For example, counting 1,2,3... is incrementing by 1. You can increment a barcode or other data field in either the Data Entry or Data Table window.

## Landscape

Landscape is a photographic term used to describe your printer’s page orientation. Landscape prints a page so that it’s wider than it’s tall. *See also* [Portrait](#).

## Object

An object is an item you can move, resize, add, or remove from a form. Objects include fields, clipart, rectangles, circles, lines, text boxes, and OLE objects. Work with the objects in the Output Forms window.

## OLE

OLE (Object Linking and Embedding) allows you to use objects created in other programs in DataBase. You can edit these objects in their original format in the Output Forms window of DataBase.

## Portrait

Portrait is a photographic term used to describe your printer’s page orientation. Portrait prints a page so that it’s taller than it’s wide. *See also* [Landscape](#).

## POSTNET Barcode

The POSTNET (Postal Numeric Encoding Technique) barcode was developed by the USPS to encode ZIP Code information so that it can be read by barcode sorting machines. A POSTNET barcode only prints when a record has a ZIP+4 Code. The USPS recommends that you only print barcodes when you want to submit for Bulk Mail Presort discounts.

## Printable Region

The printable region is the area where the printer can place information on a page. There is a margin on all edges of the paper where the printer can't print. The size of this area varies depending on your printer.

## Printer Driver

A printer driver is the software that allows DataBase to communicate with your printer. Install a printer driver using the Windows Control Panel.

## Record

The data for each item, individual, or company in your database is stored in a record. Each database stores a collection of these records. The data for each record is stored in a set of fields within the record.

## Right-Click

Right-clicking is a time-saving technique that opens a shortcut menu related to a button or area in the current window. Position the cursor over the item and click on it with your right mouse button. If available, a shortcut menu appears. Position the cursor over the shortcut option you want, and then click the left mouse button to select the option.

## Sheet-Feed

Sheet-feed refers to a type of printer that uses individual sheets of paper or labels. Laser and ink-jet printers are sheet-feed type. *See also* [Form-Feed](#).

## Shortcut Menu

When you right-click an object, the menu that opens is called a shortcut menu. Select an item from a shortcut menu by clicking on it.

## Template

A Template is blank database with pre-defined fields, designs, and reports.

## Text Box

A text box is used to enter text on your form that you want to print exactly the same in each record. Place a text box on your form in the Output Forms window or in the Edit Data Entry Form window. Edit the text in the same window that you use to create the text box.

# Index

---

## A

- Access [64](#), [65](#)
- ACT! [64](#)
- address
  - mailing [156](#)
  - return [159](#)
- address fields
  - aligning on envelopes [203](#)
- administrator password [43](#), [295](#)
- advanced
  - filtering [103](#)
  - search and replace [95](#)
  - search to find [91](#)
- aligning
  - addresses on an envelope [203](#)
  - objects [147](#), [149](#)
  - printer [198](#), [199](#)
  - text [161](#)
- alignment box
  - adding [150](#), [166](#)
  - adding objects to [152](#)
  - deleting [153](#)
  - fonts [152](#)
  - mailing address [156](#)
  - moving [151](#)
  - properties [152](#)
  - sizing [151](#)
  - text alignment [152](#)
  - using [150](#), [317](#)

- Approach [64](#)
- ASCII text files [64](#), [65](#)
- aspect ratio [173](#)
- assigning fields [68](#)
- attributes [161](#)

## B

- background image
  - adding [170](#), [170](#), [309](#)
  - center image [171](#)
  - color [310](#)
  - fit image to label [171](#)
  - remove [171](#)
  - replace [171](#)
  - rotate [171](#)
- backup files [287](#), [319](#)
- barcodes
  - adding [158](#), [183](#)
  - color [188](#)
  - control characters [190](#)
  - entering data [189](#)
  - font [188](#)
  - incrementing [190](#)
  - POSTNET [184](#), [189](#)
  - rotating [188](#)
  - sizing [188](#)
  - specifications [186](#)
- basics of program [25](#)

- booklets
  - designing forms [124](#)
  - headers and footers [166](#)
- borders [177](#)
- brand [121](#)
- brightness and contrast [175](#)
- bring forward [145](#)
- bring to front [145](#)
- built-in help (see online help) [36](#)
- buying labels [122](#)

## C

- calibrating printers [199](#)
- cards
  - designing forms [124](#)
- case of text [48](#)
- CD labels [314](#)
- cells
  - copy and paste [85](#)
- centimeters [128](#), [148](#)
- change form size [121](#), [122](#)
- checkbox field [55](#)
- choosing
  - forms [115](#)
  - labels [117](#)
  - new form size [120](#)
- circles
  - adding [177](#)
  - borders [177](#)
  - fill color [178](#)
  - moving [177](#)
  - outline color [178](#)
  - outline thickness [178](#)
  - properties [179](#)
  - sizing [177](#)
- clipart
  - adding [169](#)
  - field [74](#)
  - file formats [172](#)
  - moving [173](#)
  - rotating [174](#)
  - sizing [173](#)
  - unreadable [311](#)
- collating copies [197](#)

- color
  - barcodes [188](#)
  - data table rows [82](#)
  - filling shapes [178](#)
  - improving display [311](#)
  - lines [176](#)
  - system [311](#)
- color settings [297](#)
- columns in data table [81](#), [82](#)
- control characters [190](#)
- copying
  - cells [85](#)
  - data [83](#)
  - files [287](#)
  - forms [118](#)
  - records [84](#)
- corrupted data [322](#)
- curved lettering [309](#)
- custom file [45](#)
- custom form size [122](#), [199](#), [316](#)
- cutting
  - cells [85](#)

## D

- data
  - barcodes [189](#)
  - checking for overflow [193](#)
  - copying between records [83](#)
  - does not print [316](#)
  - entering [69](#), [70](#), [71](#), [78](#), [78](#)
  - exporting [290](#)
  - fields [156](#)
  - filtering records [100](#)
  - finding [87](#), [88](#)
  - importing [63](#), [64](#)
  - incrementing fields [86](#)
  - matching fields [68](#)
  - replacing [92](#), [96](#)
  - sorting [98](#), [99](#)
- data entry form [47](#)
- Data Entry window [70](#)



- data table
  - changing fonts [80](#)
  - formatting [81](#)
  - inserting records [85](#)
  - moving columns [82](#)
  - options [79](#)
  - previewing [205](#), [210](#)
  - printing [193](#), [205](#), [211](#)
  - properties [206](#)
  - resizing columns [81](#)
  - resizing rows [81](#)
  - row color [82](#)
  - sorting data [98](#)
- Data Table window [78](#)
- date settings [298](#)
- dBASE [64](#)
- deleting
  - alignment box [153](#)
  - cells [85](#)
  - duplicate records [109](#), [110](#)
  - fields [158](#)
  - files [292](#)
  - form folders [120](#)
  - forms [120](#)
  - records [110](#)
- delivery point [189](#)
- display all records [100](#)
- ditto field [83](#)
- do not call list [232](#)
- do not email list [232](#)
- domain name [214](#)
- downloading updates [302](#)
- drawing objects, adding [169](#)
- duplicate record, removing [109](#), [110](#)

## E

- earlier version [21](#)
- editing OLE objects [182](#)

- ellipses
  - adding [177](#)
  - borders [177](#)
  - fill color [178](#)
  - moving [177](#)
  - outline color [178](#)
  - outline thickness [178](#)
  - properties [179](#)
  - sizing [177](#)
- email
  - preferences [214](#)
  - server [214](#)
  - summary [229](#)
  - unsubscribe [232](#)
- email message
  - copying [104](#), [220](#)
  - deleting [104](#), [221](#)
  - renaming [221](#)
  - spell checker [222](#)
- embedding objects [181](#), [182](#)
- entering data [69](#), [70](#), [71](#), [78](#), [78](#)
- envelopes
  - designing forms [124](#)
  - printing [201](#)
- Excel [64](#), [66](#)
- exporting
  - files [290](#)
  - reports [256](#)

## F

- feed method [121](#)
- feed settings, envelope printing [202](#)

## fields

- add [138](#)
- adding [156](#), [157](#)
- adding to alignment box [152](#)
- changing the printed format [48](#)
- deleting [56](#), [158](#)
- entering data [69](#)
- fonts [163](#)
- formatting text [160](#)
- images [74](#)
- in data table [79](#)
- in text boxes [157](#)
- incrementing [86](#), [167](#)
- list [157](#), [158](#)
- name placement [164](#)
- new [54](#)
- rotating [162](#)
- text alignment [161](#)
- types [55](#)

## files

- backup [287](#), [319](#)
- cannot open [320](#)
- copying [287](#)
- deleting [292](#)
- exporting [290](#)
- importing [63](#)
- naming [42](#), [287](#)
- new [290](#)
- new custom [45](#)
- new with template [44](#)
- opening [32](#)
- saving [287](#)
- templates [44](#)
- transferring [289](#)

## fill color [178](#)

## filter dialog

- advanced filter [103](#)
- simple filter [101](#)
- standard filter [102](#)

## filtering records [100](#)

## find dialog

- advanced search [91](#)
- simple search [89](#)
- standard search [90](#)

## finding records [87](#), [88](#), [92](#)

## folders

- adding new [118](#)
- renaming [117](#)

## fonts [80](#), [152](#), [163](#)

- booklet headers and footers [166](#)

## footers [166](#), [236](#)

## form letters, creating [235](#)

## form letters, designing [125](#)

## form-feed [200](#), [315](#), [324](#)

## forms

- choosing [115](#)
- choosing new size [120](#)
- copying [118](#)
- custom size [122](#), [199](#), [316](#)
- moving [118](#)
- new output form [119](#)
- previewing [195](#)
- printing [193](#), [197](#)
- renaming [117](#)

## FoxPro [64](#)

## G

## go to [75](#), [92](#)

## graphics

- adding [169](#)
- file formats [172](#)
- moving [173](#)
- rotating [174](#)
- sizing [173](#)

## grid [148](#)

## H

## headers [166](#), [236](#)

## help

- getting [35](#)
- online [36](#)
- status bar [37](#)
- ToolTips [37](#)
- user's guide [35](#)

## helpful message [299](#)

## history field [248](#)

## human readable information [188](#)

## I

## image fields [74](#)

## importing data [63](#), [64](#), [68](#)

inches 128, 148

incrementing

barcodes 190

fields 86, 167

## K

keyboard shortcuts 308

## L

labels

borders 177

buying 122

CD 314

choosing 117

designing forms 124

form-feed 200, 315

outline disappears 310

sheet-feed 198, 315

skipping 196

lasso 143

layers 145

license key 20, 294

lines

color 176

drawing 176

moving 176

properties 179

sizing 176

thickness 176

linking objects 181, 182

list box fields

adding items to a list box 50

deleting items from a list box 52

moving items in a list box 51

login 20, 43

Lotus 64

## M

mail server 214

mailing address 156

manual (see user's guide) 35

mapping fields 68

margins for envelope printing 203

metric units 128, 148

moving

alignment box 151

between records 75

columns in data table 82

forms 118

lines 176

objects 144

pictures 173

shapes 177

MyContactManager 24, 64

MyDataBase 64

MyLabels 64

MyMailList 64, 184

## N

name placement 164

naming a file 42

new

custom file 45

database 42

fields 54

file 42, 290

file with template 44

form 119

record 75

notebox field 55

## O

object properties 152, 160, 164, 173, 175

object toolbar 126, 128, 160

objects

aligning 147

embedding 181, 182

group 143

layers 145

linking 181, 182

moving 144

selecting 141, 143, 312

sizing 144

stacking order 145

old version 21

OLE 181, 182, 309

online help 36

opening

files 32

ordering labels 122

- outline
  - color 178
  - thickness 178
- Outlook 64, 66
- output format 48, 56
- Output Forms window 126
- overflow of data 193

## P

- page numbers 236
  - adding to booklets 166
- Paradox 64
- part number 121
- password 43, 295
- pasting
  - cells 85
- patches 301
- personal settings 294
- pictures
  - adding 169
  - field 74
  - file formats 172
  - moving 173
  - rotating 174
  - sizing 173
- placement 145
- POSTNET barcodes 184, 189
- preferences
  - color settings 297
  - date settings 298
  - email 214
  - messages 299
  - program settings 297
- preserve aspect ratio 173
- previewing
  - data table 205, 210
  - forms 195
  - reports 255
- previous version 21, 24
- printable region 177, 198

- printing
  - aligning printer 198, 199, 199
  - barcodes 190
  - data table 193, 205, 211
  - envelopes 201
  - forms 193, 197
  - previewing data table 205, 210
  - previewing forms 195
  - previewing reports 255
  - printer drivers 314
  - reports 255, 281
  - skipping labels 196
- printouts
  - choosing (see forms) 115
  - creating new 129
- product barcodes 186
- program basics 25
- program updates 301
- properties toolbar 126, 128, 160
- purchasing labels 122

## Q

- quick arrange 149
- quick find buttons 88

## R

- read-only 320
- records
  - adding 85
  - copying data 84
  - deleting 110
  - filtering 100
  - finding 87, 88, 92
  - moving between 75
  - removing duplicates 109, 110
  - replacing data 92, 96
  - selecting 108
  - sorting data 98, 99

- rectangles
  - adding [177](#)
  - borders [177](#)
  - fill color [178](#)
  - moving [177](#)
  - outline color [178](#)
  - outline thickness [178](#)
  - properties [179](#)
  - sizing [177](#)
- removing
  - alignment box [153](#)
  - blank spaces [150](#), [166](#)
  - duplicate records [109](#), [110](#)
  - fields [158](#)
  - form folders [120](#)
  - forms [120](#)
  - program [319](#)
  - records [110](#)
- renaming
  - forms and folders [117](#)
- replace dialog
  - advanced search and replace [95](#)
  - simple search and replace [93](#)
  - standard search and replace [94](#)
- replacing data [92](#), [96](#)
- reports [248](#)
  - choosing [242](#), [258](#)
  - column headings [247](#)
  - column width [246](#)
  - columns [245](#)
  - copying [243](#), [259](#)
  - counting records [251](#)
  - data [245](#)
  - date [254](#)
  - deleting [244](#), [260](#)
  - exporting [256](#)
  - fields [245](#)
  - filtering records [249](#)
  - footer [254](#)
  - header [254](#)
  - headings [247](#)
  - image height [246](#)
  - landscape [245](#), [269](#)
  - line spacing [253](#)
  - margins [253](#)
  - maximum column widths [246](#)
  - new [244](#)
  - notebox fields [248](#)
  - orientation [245](#), [269](#)
  - page layout [244](#), [269](#)
  - page number [254](#)
  - portrait [245](#), [269](#)
  - previewing [255](#)
  - print setup [244](#), [269](#)
  - printing [255](#), [281](#)
  - readability options [253](#)
  - record count [251](#)
  - renaming [243](#), [259](#)
  - separator lines [253](#)
  - sorting records [248](#)
  - subtotal configuration [250](#)
  - subtotal titles [250](#)
  - text wrap [247](#)
  - title [254](#)
  - totaling columns [252](#)
  - wrapping text [247](#)

- resizing
  - alignment box [151](#)
  - barcodes [188](#)
  - lines [176](#)
  - objects [144](#)
  - pictures [173](#)
  - shapes [177](#)
- return address [159](#), [313](#)
- rotating
  - barcodes [188](#)
  - pictures [174](#)
  - text [162](#)
- row color in data table [82](#)
- rows in data table [81](#)
- rulers [128](#)

## S

- save as [287](#), [319](#)
- saving files [287](#)
- scan for overflow [194](#)
- scheduling updates [303](#)
- search for duplicates [109](#)
- select all [143](#)
- selecting
  - objects [312](#)
  - records [108](#)
- send back [145](#)
- send to back [145](#)
- sequencing fields [167](#)
- serializing barcodes [190](#)
- server domain name [214](#)
- sheet-feed labels [198](#), [315](#)
- shortcut menus [308](#)
- shortcuts [307](#)
- shrink to fit [152](#), [193](#)
- simple
  - filtering [101](#)
  - search and replace [93](#)
  - search to find [89](#)
- sizing
  - alignment box [151](#)
  - barcodes [188](#)
  - lines [176](#)
  - objects [144](#)
  - pictures [173](#)
  - shapes [177](#)

- skipping labels [196](#)
- SMTP [214](#)
- snap to grid [148](#)
- sorting data [98](#), [99](#)
- specifications for barcodes [186](#)
- spell check email [222](#)
- squares
  - adding [177](#)
  - borders [177](#)
  - fill color [178](#)
  - moving [177](#)
  - outline color [178](#)
  - outline thickness [178](#)
  - properties [179](#)
  - sizing [177](#)
- stacking order [145](#)
- standard
  - filtering [102](#)
  - search and replace [94](#)
  - search to find [90](#)
- status bar [37](#)
- support, technical [337](#)
- system colors [297](#)

## T

- technical support [337](#)
- templates [44](#)
- text boxes
  - adding [159](#)
  - adding fields [157](#)
  - adding to alignment box [152](#)
  - fonts [163](#)
  - formatting text [160](#)
  - return address [159](#)
  - rotating [162](#)
  - sizing [312](#)
  - text alignment [161](#)
- text files [64](#), [65](#)
- titles
  - adding to booklets [166](#)
- toolbars [128](#), [128](#), [160](#), [307](#)
- ToolTips [37](#)
- transferring files [289](#)

## U

- uninstall program [319](#)

- unsubscribe [232](#)
- update download wizard [302](#)
- updates
  - downloading [302](#)
  - scheduling [303](#)
- updating the program [301](#)
- upgrading [21](#), [24](#)
- user login [20](#), [294](#)
- user's guide [35](#)

## **W**

- watermarks [309](#)

## **Z**

- ZIP+4 Codes [189](#)
- zoom [127](#)





# Technical Support Policy

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**BEFORE CONTACTING TECHNICAL SUPPORT:** Please take advantage of our free options. Look in the User's Guide installed with your program, the online help in the program, or the Frequently Asked Questions (FAQs) in the **Support** section of our Web site (<http://www.avanquestusa.com/support>). The FAQs might have information and helpful hints that are more current than the User's Guide and online help. If the FAQs do not help, you can submit a free email request from the main FAQ page.

**LIVE TECHNICAL SUPPORT POLICY:** Avanquest USA's goal is to provide powerful, low-cost software solutions and services to small business users. In order to keep our product costs low, we have chosen not to include the cost of Live Technical Support in the price of our software. Live Technical Support is a premium service and is available on a pay-per-minute basis. There is an initial telephone charge for the first ten minutes, and an additional charge for each minute after the first ten. Customers will not be charged for problems resulting from product defects.

**WHEN YOU CALL:** Please have your credit card, serial number, and version number ready. Your serial number and version number are located on the CD and in the software program (open the **Help** menu and choose **About**).

## Technical Support

\$24.95 for the first 10 minutes

\$2.95 for each additional minute

(925) 474-1701



**NOTE:** This policy is subject to change without notice. Support services will be provided according to the prices, terms, and conditions in place at the time the services are used.

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