# Panorama Tutorials

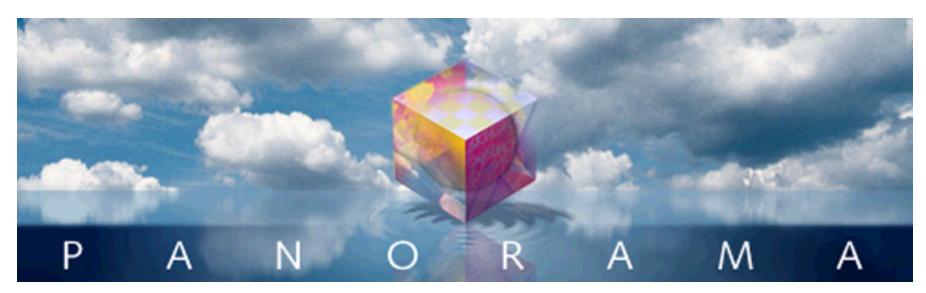
Panorama Tutorials Copyright © 2007, ProVUE Development, All Rights Reserved

> ProVUE Development 18685-A Main Street PMB 356 Huntington Beach, CA 92648 USA

> > www.provue.com



# **Table of Contents**

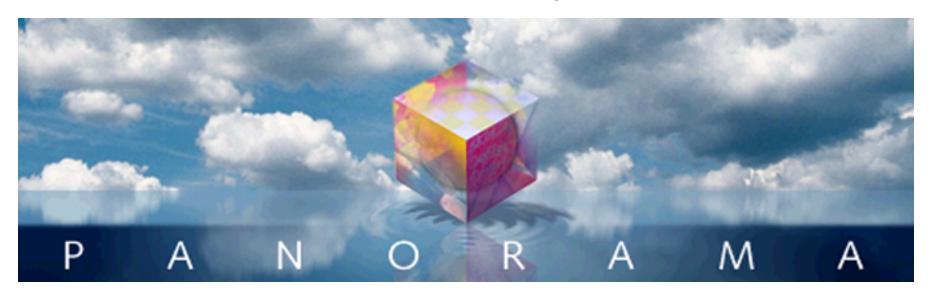


- Click on any entry to jump to the page ---

Lesson 1: Building Your First Mailing List Database	4
Entering Data Into Your New Database	7
Making Corrections	8
Editing a Multi-Line Cell	9
Saving Your Work	11
Importing Data Into the Mailing List	13
Adjusting Column Widths, Font and Size	16
Sorting the Database	19
Sorting By Two or More Fields	20
Finding a Person	22
Finding Multiple People	
Introducing the Live Clairvoyance™ Wizard	25
Selecting Instead Of Finding	
Using the Sounds Like Option	
Making More Complex Selections	30
Complex Searches with the Live Clairvoyance Wizard	32
Saving Your Favorite Searches	33
Selecting All Records	
Adding A Database To Your List Of Favorites	36
Closing a Database	
Re-Opening a Favorite File	39
Re-Opening a Recently Opened Database	40
Transferring Data with VCards	
Displaying a Map	
Transferring a Person from the White Pages	
Printing the Data Sheet	
Creating a Form for Printing Mailing Labels	50
Previewing the Labels	
Printing the Labels	
Switching Between Forms and the Data Sheet	56
Creating a Data Entry Form	57
Creating Graphic Objects	
Selecting and Moving a Graphic Object	
Adjusting the Size of a Graphic Object	
Changing an Objects Appearance	62

Creating Text Objects	. 6	66
Changing the Font and Size	. 6	59
Editing a Text Object	. 7	70
Creating Data Cell Objects	. 7	70
Aligning Multiple Objects	. 7	72
Using Data Cells to Edit Data		
Building the Data Entry Form		
Writing a Letter to Someone in the Mailing List		
Printing a Mail Merge Letter		
Tidying Up		
Lesson 2: Building and Organizing a Checkbook		
Loading the Data		
Analyzing the Checkbook		
Selecting Data		
Calculating the Grand Total		
<b>U</b>		
Calculating Subtotals Hiding and Showing Detail		
Sorting Summaries by Value		
Removing Summary Records		
Automating Tasks with Procedures		
Using the Action Menu		
Editing a Procedure		
Analyzing Data with a Crosstab		
Auditing the Crosstab Table		
Making a Bar Chart		
Customizing the Chart Appearance		
Data Entry Helpers	. 1	137
Dates	. 1	137
Smart Dates	. 1	139
Check Number	. 1	140
Рау То	. 1	141
Clairrows	. 1	142
Category	. 1	143
Looking Up the Category From a Previous Record		
Calculating the Checkbook Balance		
Drawing a Check Form		
Creating the Text Editor SuperObjects		
Dressing Up the Check Form		
Making the Form Elastic		
Lesson 3: Building an Invoice Database		
Line Item Fields		
Creating an Invoice Form		
Adding Line Items to the Form		
Entering Data into the Invoice		
Lesson 4: Building a Price List		
-		
Loading the Data		
Linking the Price List to the Invoice		
Using the Linked Invoice & Price List		
Creating a Procedure to Add an Item		
Creating a Price List Form with Buttons		
Saving a File Set	. 2	217

# **Step-by-Step Tutorials**



It's time to jump into the database fast lane! By the time you finish the lessons in this tutorial you'll have a solid foundation in the basic techniques you'll need to use Panorama effectively.

This tutorial is divided into four lessons. Each lesson builds on the previous lessons and introduces more advanced topics. In "Lesson 1: Building Your First Mailing List Database" on page 4 you'll learn how to create and set up a simple mailing list database. In "Lesson 2: Building and Organizing a Checkbook" on page 90 you'll not only build a simple checkbook register file but also learn several techniques for organizing and summarizing the checkbook data. In "Lesson 3: Building an Invoice Database" on page 176 you'll create a simple invoice for creating and tracking orders. Finally, in "Lesson 4: Building a Price List" on page 194 you'll create a price list and link it to the invoice database. Each lesson should take from 30 minutes to an hour to complete. The lessons are designed so you can easily follow along and actually build each database as you read. There are plenty of illustrations to show what the screen will look like at each step, so you don't need to worry about getting lost.

Before you begin, you'll need to install Panorama on your computer. If you haven't done so already, see "<u>Installing the Software</u>" on page 75. It's not necessary to activate Panorama to complete the operations in this tutorial. If you haven't purchased Panorama yet you can try out the tutorials before you decide that you want to purchase Panorama (see "<u>Using Panorama's "Demo Mode"</u>" on page 90).

I hear the bell—class is about to begin. It's time to get started with your new Panorama career! I hope you have as much fun learning Panorama as we had creating it for you.

Sincerely,



Jim Rea, President

P.S. This tutorial teaches you how to work with Panorama. It assumes, however, you already are familiar with your computer and operating system. You should be able to point, click, and drag selections, and be able to make selections from menus, use scroll bars, and edit text. If you are not familiar with these skills, you should review the tutorial information supplied with your computer.

# Lesson 1: Building Your First Mailing List Database

A mailing list for storing names and addresses is one of the most basic database applications, and is very simple to create with Panorama. Double click the Panorama application to start (or, if you are using **Microsoft Windows**, use the **Start** menu. Panorama will automatically open the **New Database Wizard**, shown below. (If you are already in Panorama you can open this wizard by choosing **New File** from the **File** menu.)



Your new mailing list database will have seven fields — First, Last, Address, City, State, Zip and Phone. (See "<u>Fields</u>" on page 213 for a complete explanation of fields.) The wizard has a template for a database that is very close to this, to select the template press the **Templates** icon in the toolbar. The template selection dialog will appear.

Blank	4	Basic Mailing List					
Ten Generic Fields	<u> </u>	•					
Mailing List		This template creates a very minimal mailing list. Once the database has been created you can set up mailing labels using the <b>New Form</b> command in the <b>View</b>					
Contacts (Basic)		menu. Click the Quick Label button, then select the type of label and label					
Contacts (Advanced)		contents.					
Checkbook		When entering data, Panorama will automatically capitalize the first letter of each word typed into the Name, Address, City and Country fields (for example John					
Expense Report		Smith, San Francisco). All letters typed into the State field will be capitialized (for					
Phone Log		example CA, TX). If you don't like this automatic capitalization you can change it after the database is created with the <b>Field Properties</b> command in the <b>Setup</b>					
To-Do List		menu.					
Time Card							
Time Card 2							
Price List							
Price List (Discount)							
Invoice							
Parts and Labor Invoice							
Product Inventory	Ă						
Equipment Inventory	Ψ.						

Select Mailing List and press the Choose button. The list of fields will appear in the main New Database Wizard window.



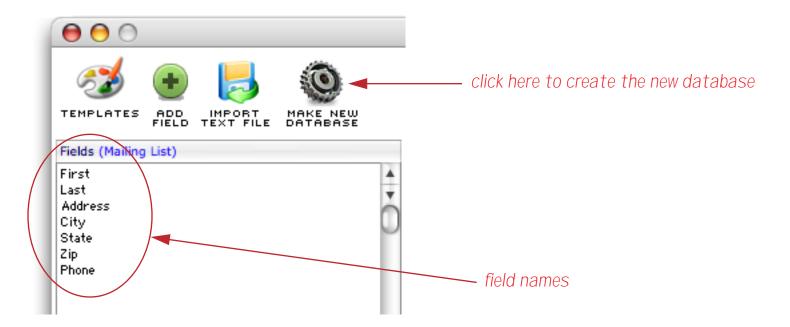
This template isn't quite what we wanted for our new database — we don't need a Country field but we do need a Phone field. To fix this start by double clicking on the word Country to select it for editing.

Fields (Mailing List)	
First Last Address City State Zip	÷
Country	

Now type **Phone** to change the name of this field.

First	
	-
Last	*
Address	<u> </u>
City	
State	
Zip	
Phone	

At this point you could press the Return key to add more fields, or edit or re-arrange the existing fields, but for this example we are done and ready to create the new database. To do this simply press the **Make New Database** icon in the toolbar.



When you press the Make New Database tool the wizard will create a new database for you. The database is displayed using a row and column format called the **data sheet**. The new database contains one blank record (line) and seven fields (columns).

0	0	Untitled							
•	First	Last	Address	City	State	Zip	Phone A		
a R									
۵									
<b>→</b>									
4									
							4		
	1 visib	le/1 total							

#### **Entering Data Into Your New Database**

The new database is ready to use immediately — you can just start typing to enter data. For example, to enter the name Bob simply start by pressing the b key. A small pop-up window will appear over the current cell. This pop-up window is called the **Input Box** and is used for all data entry in the data sheet(see "<u>The Input Box</u>" on page 276).

0	Untitled							
<u>له</u>	First	Last	Address	City	State	Zip	Phone	*
¥	B							D

Complete the entry of the name by pressing . Notice that Panorama automatically capitalized the first letter of the name. We'll show you how to turn this feature on and off later (see "<u>Automatic Capitalization</u>" on page 285 if you can't wait).

0	O O Untitled							
() ()	First	Last	Address	City	State	Zip	Phone	<b></b>
<u>~</u>	Bob							
33								

When you've finished with the first name press the **Tab** key to move on to the last name.

0	Untitled						
	First	Last	Address	City	State	Zip	Phone 🔺
<u>.</u> ≁	Bob						0
37							

Continue typing and pressing the **Tab** key until you get to the phone number. When you tab into the Phone field you'll notice that Panorama automatically types in the ( for you.

			Untitled			
	Last	Address	City	State	Zip	Phone 🔺
<u>♀</u> 중← ☑	Smith	1414 Rimrock Road	Las Vegas	N∨	89104	

Page 8

The New Database Wizard has set up an Input Pattern to make typing the phone number easier (see "Input Patterns" on page 293). All you have to type is the numbers, for example 7024879023. Panorama will type in the punctuation for you.

0	00		Untitled				
 ● ●	Last	Address	City	State	Zip	Phone	×
<b>?</b> %∼	Smith	1414 Rimrock Road	Las Vegas	NV	89104	(702) 487-9023	

Panorama types in (, ), space and - for you

Once you've finished entering the phone number you have a choice to make. Press the **Tab** key if you want to add another line and continue editing data.

0	00	Untitled						
•	First	Last	Address	City	State	Zip	Phone 🔺	
<u>.</u> ≁	Bob	Smith	1414 Rimrock Road	Las Vegas	NV	89104	(702) 487-902	

Press Return or Enter if you are done with data entry for the moment.

۲	00		Untitled				
<u>له</u>	Last	Address	City	State	Zip	Phone	* *
	Smith	1414 Rimrock Road	Las Vegas	NV	89104	(702) 487-9023	

#### **Making Corrections**

It's easy to change the contents of any cell. Start by double clicking on the cell. This opens the Input Box, allowing you to type in a new value or to make corrections.

000		Untitled				
Last	Address	City	State	Zip	Phone	4
Smith	1414 Rimrock Road	Las Vegas	NV	89104	(702) 487-9023	
	double click to edit c	ell				

Press the **Enter** key or click on another cell when you are finished. (You can also press the **Tab** key if you want to skip to next cell and edit it too.)

#### **Editing a Multi-Line Cell**

If you need more room to enter your data, you can expand the size of the Input Box. For example, you might need to expand the Input Box to enter an address with more than one line. To expand the Input Box, move the arrow to the lower right hand corner of the box. When the mouse reaches the corner, the arrow will flip over so that it is pointed down instead of up.

0	00		Untitled					
•	Last	Address	City	State	Zip	Phone	*	
<b>??</b> ₩	Smith	1414 Rimrock Road 🚺	Las Vegas	NV	89104	(702) 487-9023	Ó	
32								
		mouse "flips over" in lower right hand corner						

When you see the arrow flip over, press the mouse and drag the corner of the box to the size you want.

000		Untitled				
Last	Address	City	State	Zip	Phone	A
Smith	1414 Rimrock Road	gas	NV	89104	(702) 487-9023	Ó
						Ĩ
						_
<u></u>		¥				_
and the second s						

When you release the mouse the Input Box will expand to the new size.

0	00		Untitled				
•	Last	Address	City	State	Zip	Phone	A
	Smith	1414 Rimrock Road	is is	NV	89104	(702) 487-9023	

Now that the Input Box has been expanded you can use the **Return** key to add additional lines to the data cell. You can add as many lines as you like.

000		Untit	ed			
Last	Address	City	State	Zip	Phone	▲ ▼
Smith	1414 Rimrock Apt 4-G	Road As	NV	89104	(702) 487-9023	

Page 10

When you are finished editing the address press the **Enter** key. The Input Box closes and now you can only see the first line of the data. (If you want to see more than one line of data in a cell that is not being edited you must use a form, see "<u>Displaying and Editing Text</u>" on page 565).

00		Untitled						
Last	Address	City	State	Zip	Phone	A V		
Smith	1414 Rimrock Road	Las Vegas	NV	89104	(702) 487-9023			
33								
	only first line of text is visible in data sheet							

If you double click to edit the data cell again Panorama will remember the new size of the Input Box.

0	00		Untitled				
<ul> <li>•</li> <li>•</li> </ul>	Last	Address	City	State	Zip	Phone	* *
	Smith	1414 Rimrock Road Apt 4-G	as •	NV	89104	(702) 487-9023	

You can adjust the size of the Input Box any time it is open.

000		Untitled				
Last	Address	City	State	Zip	Phone	*
Smith Smith	1414 Rimrock Road Apt 4-G	Las Vegas	NV	89104	(702) 487-9023	

If the Input Box is less than one inch high it won't have a scroll bar.

0	00		Untitled				
() ()	Last	Address	City	State	Zip	Phone	*
<b>??</b> *	Smith	1414 Rimrock Road Apt 4-G	Las Vegas	NV	89104	(702) 487-9023	

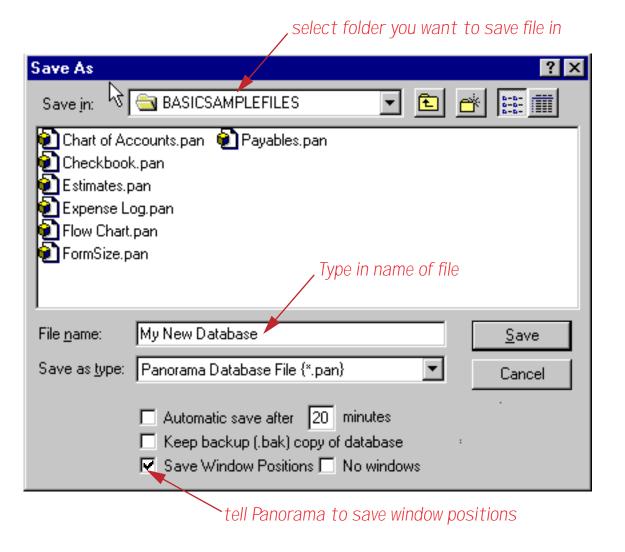
To learn more about expanding the Input Box see "Expanding the Input Box" on page 277

# Saving Your Work

To permanently store your new database choose the **Save** command from the File menu. Using the dialog, choose the folder you want to save the database in. Type in the name of the file and check the **Save Window Positions** option (see "<u>Saving Window Positions</u>" on page 86). When everything is set up press the **Save** button.

type in name of file $\setminus$	select folder you want to save file in I
Save	
Save As: My Mailing List	
Tutorial	•
Network   Jaguar   Classic   Panther   Alaska   Fire Jaguar   Fire Panther   Fire Classic   Fire Alaska   SightWeb ▲   CocoaGest ▲   CocoaGest ▲   Desktop   Operations   Applications   jimrea	Date Modified
<ul> <li>Panorama O Text Only O Set</li> <li>Automatic save after 20 minutes</li> <li>Keep backup copy (.b) of database</li> <li>Save window positions O No windows</li> </ul>	
New Folder	Cancel Save
tell Panoran	na to save window positions

If you are using a Windows PC the dialog looks a little bit different but the procedure is exactly the same.



After the file is saved the name of the window will change from Untitled to the name of the file, in this case My Mailing List.

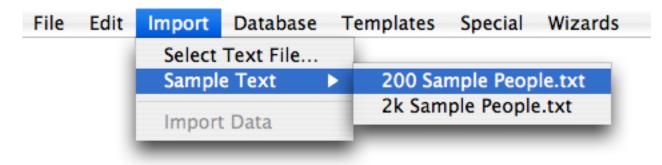
😝 😑 😁 My Mailing List	
Last Address City State Zip Phone	×
Smith         1414 Rimrock Road         Las Vegas         NV         89104         (702) 487	7-9023
<u>+</u>	
	¥
1 visible/1 total	▼ ) ↓ ► /

#### Importing Data Into the Mailing List

If you already have data in another program (FileMaker, Access, Excel,etc.) you can transfer that data to Panorama by exporting it into a text file (tab or comma delimited) and then importing it into Panorama. Panorama includes some text files with sample data, so we'll import one of those files now. Start by choosing **Import Text** from the File menu. The wizard opens and lists the fields in your database on the right hand side.

$\Theta$	0	Text Im	port Wizard		
	Text File		Database File		Options
			My Mailing List		🗹 Append 🖂 Replac
Field	⊲D Sample Data	Field	Formula	Sam	ple Data
«1»		<ul> <li>First</li> </ul>			
«2»		🗶 Last			
«3»		Address			
«4»		City 📐			
«5»		State			
«б»		Zip			
«7»		Phone			
«8»					
«P»					
			Stields in data	tabaca	

The next step is to select the text file that contains the data to be imported. Normally you would choose **Select Text File** from the **Import** menu, then locate and choose the file you want to import using the standard file selection dialog. For this demo, however, we've prepared sample data that is ready to use. Simply choose **200 Sample People.txt** from the **Sample Text** submenu of the **Import** menu.



Page 14

Once the file is selected the wizard will display the data in the first line of the text file. The text file contains 15 fields, including name, address, phone, fax, email and birthday (not shown).

$\Theta \Theta \Theta$		Text Import	Wizard	
Text File			Database File	Options
200 Sample People.t	×t	۲	1y Mailing List	🗹 Append 📃 Replace
Field Sample Dat	a	Field	Formula	Sample Data
«1» Ms.	<b>*</b>	First		
«2» Barbara	1	Last		
«З»		Address		
«4» Moldenhauer		City		
«5»		State		
«6» CIO		Zip		
«7» Memphis Consultan	ts Inc	Phone		
«8» 155 Elm Ter				
«9» Cananda i gua				
x10» NY				
«11» 14425				
«12» (716) 840-5619				
«13» (716) 840-2322 🥄				
«14» barbara309@creati	ve.net _			

Before you can import the data you must assign the fields in the text file to fields in the database. Start by dragging Barbara to the First field.

0 0	Text Import	Wizard	
Text File		Database File	Options
200 Sample People.t×t	M;	y Mailing List	🗹 Append 🖂 Replace
Field 🕼 Sample Data	Field	Formula	Sample Data
<pre>«1» Ms. «2» Barbara</pre>	First	► <b>k</b>	
<pre>«3» «4» Moldenhauer «5»</pre>	Address City State		

When you release the mouse the wizard will assign the second field from the text file to the First field.

0 0		Text Imp	ort Wizard			
Text File			Database	e File		Options
200 Sample People.t×t			My Mailir	ıg List		Append 🖂 Replace
Field Sample Data		Field		ormula	Sam	ple Data
«1» Ms.	4	First	«2»	)	Barbara	
«2» Barbara	1	Last				
«3»	n	Address		second fie	eld of text fil atabase field	e assigned

Drag each of the text fields you want to import onto the corresponding database field. You can check your work by looking at the Sample Data column.

	Text File		Database File		Options
	200 Sample People.t×t		My Mailing List		
Field	⊲D Sample Data	Field	Formula	Sam	ple Data
«1»	Ms.	First	«2»	Barbara	
«2»	Barbara	-Last	«4»	Moldenhauer	r
«3»		Address	((8))	155 Elm Te	r i i i i i i i i i i i i i i i i i i i
«4»	Moldenhauer	City	«9»	Cananda i gu	a
~5»	ير ڪري. ا	State	«10»	NY	
«б»	C10/ ///	Zip	«t1»	14425	
«7»	Memphis Consultants Inc	Phone	«12»	(716) 840-	5619
«8»	155 Elm Terring and an an	- k3			
«9»	Cananda i gua				
<10»					
«11»					
«12»	· · · ·				
«13»					
«14»	barbara309@creative.net				

Once all of the fields are set up choose Import Data from the Import menu.

File Edit	Import	Database	Template	s Special	Wizards
0	Select	Text File	t Import V	Vizard	
Text 200 Sample	Import	t Data		Database File Mailing List	
ld Sa	mple Data		Field	Formula	Sa
» Ms.		<ul> <li>First</li> </ul>		«2»	Barbara
» Barbara		🗶 Last		«4»	Moldenhau

The wizard will import the data from the text file into the database.



Your database now contains 201 records — the single record you typed in plus the 200 records imported by the Text Import Wizard. The total number of records is displayed in the lower left hand corner of the window.

Moldenhauer Bryant	155 Elm Ter	Canandaigua			
Brvant		Cananualyua	NY	14425	(716) 840-5
	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0
Nolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9
Dobbins	639 E Clayton Ln	Jenison	MI	49428	(616) 833-5
Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6
Pratt	34423 E. Hunt Rt	Montrose	NY	10548	(914) 810-7
Tracy	777 W Stewart Way	Sargent Bluff	IA	51054	(712) 547-5
owe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8
Stern	10773 E. Pioneer Dr	Cincinnati	OH	45207	(513) 407-5
Root	32104 S 18Th Pkwy	St George	UT	84770	(801) 611-9
McMahon	720 S.E. Florence Ter	Brooklyn	NY	11204	(718) 488-9
	oobbins Gage Pratt Tracy Lowe Stern Root	Oobbins639 E Clayton LnGage677 S. Charlotte LanePratt34423 E. Hunt RtTracy777 W Stewart WayJowe938 West Laura TrailStern10773 E. Pioneer DrRoot32104 S 18Th PkwyMcMahon720 S.E. Florence Ter	Oobbins639 E Clayton LnJenisonGage677 S. Charlotte LaneBloomfieldPratt34423 E. Hunt RtMontroseTracy777 W Stewart WaySargent BluffJowe938 West Laura TrailWinter ParkStern10773 E. Pioneer DrCincinnatiGoot32104 S 18Th PkwySt GeorgeMcMahon720 S.E. Florence TerBrooklyn	Oobbins639 E Clayton LnJenisonMIGage677 S. Charlotte LaneBloomfieldNJPratt34423 E. Hunt RtMontroseNYTracy777 W Stewart WaySargent BluffIAJowe938 West Laura TrailWinter ParkFLStern10773 E. Pioneer DrCincinnatiOHRoot32104 S 18Th PkwySt GeorgeUTMcMahon720 S.E. Florence TerBrooklynNY	Oobbins639 E Clayton LnJenisonMI49428Gage677 S. Charlotte LaneBloomfieldNJ07003Pratt34423 E. Hunt RtMontroseNY10548Tracy777 W Stewart WaySargent BluffIA51054Jowe938 West Laura TrailWinter ParkFL32793Stern10773 E. Pioneer DrCincinnati0H45207Root32104 S 18Th PkwySt GeorgeUT84770

 $\checkmark$  total number of records in the entire database

Before you go any further you should use the **Save** command (in the File menu) to save the new data in the database. Since you have already saved this file once and given it a name, Panorama will quickly save the file without asking you for the name and location again.

Since we're done with the **Text Import Wizard** for the moment, click on it's window to bring it forward and then close the window.

👰 😑 🔿	Text Import Wizard	
Text File	Database File	Options
200 Sample People.txt	My Mailing List	🗹 Append 📃 Replace

To learn more about the Text Import Wizard see "Using the Text Import Wizard" on page 111.

#### Adjusting Column Widths, Font and Size

To adjust the width of a column in the data sheet move the mouse anywhere over the column name. When the mouse is over the name it will turn into a double left/right arrow.

#### mouse turns into double left/right arrow

0	0 0		My Mailin	g List			
<u>ال</u>	First	Last ↔	Address	City	State	Zip	Phone 🔺
4	Barbara	Moldenhauer	155 Elm Ter	Canandaigua	NY	14425	(716) 840-56
	Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-06
	Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-96

To adjust the column width press and drag to the left or right.

First	_ast ····	··· Address ··· ► ++	City	State	Zip	Phone
Barbara	Moldenhauer	155 Elm Ter	Canandaigua	NY	14425	(716) 840-5
Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0
Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9
Timonthy	Dobbins	639 E Clayton Ln	Jenison	MI	49428	(616) 833-5
Kelly	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6
Marilyn	Pratt	34423 E. Hunt Rt	Montrose	NY	10548	(914) 810-7
Theresa	Tracy	777 W Stewart Way	Sargent Bluff	IA	51054	(712) 547-5
Charles	Lowe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8
Michelle	Stern	10773 E. Pioneer Dr	Cincinnati	OH	45207	(513) 407-5
Kathy	Root	32104 S 18Th Pkwy	St George	UT	84770	(801) 611-9
George	McMahon	720 S.E. Florence Ter	Brooklyn	NY	11204	(718) 488-9

When you release the mouse the column width will be adjusted.

0	0	My Ma	iling List			
() ()	First	Last	Address	City	State	Zi 🔺
<u>?</u> ≁	Barbara	Moldenhauer	155 Elm Ter	Canandaigua	NY	1.
33	Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	3.
	Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95
<u> </u>	Timonthy	Dobbins	639 E Clayton Ln	Jenison	MI	49
+	Kelly	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07
4	Marilyn	Pratt	34423 E. Hunt Rt	Montrose	NY	10
	Theresa	Tracy	777 W Stewart Way	Sargent Bluff	IA	51
	Charles	Lowe	938 West Laura Trail	Winter Park	FL	32
	Michelle	Stern	10773 E. Pioneer Dr	Cincinnati	OH	45
	Kathy	Root	32104 S 18Th Pkwy	St George	UT	84
	George	McMahon	720 S.E. Florence Ter	Brooklyn	NY	11
	201 visible.	/201 total II ◄ ► ( )	20710 C W D DI	D!-	)∢	₽ //

You can use this technique to adjust the widths of as many columns as you like (see "<u>Changing the Width of</u> <u>a Field</u>" on page 217).

0	\varTheta 🖯 🕤 My Mailing List						
() ()	First	Last	Address	City	State	Zip	Phone 🚓
<u>?</u> γ∕-	Barbara	Moldenhauer	155 Elm Ter	Canandaigua	NY	14425	(716) 840-5619
33	Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0659
	Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9673
<b></b>	Timonthy	Dobbins	639 E Clayton Ln	Jenison	MI	49428	(616) 833-5134
₽	Kelly	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6456
4	Marilyn	Pratt	34423 E. Hunt Rt	Montrose	NY	10548	(914) 810-7069

F	ields	Text	Search	Sort	Math	Setup	Wizar	ds
		Fon	t 🕨	М	y Mailii	ng List		
	Last	Size	• •	9 pq	int		State	Zip
а	Molde Bryar	nhauer it	155 Elm T 3595 E 51	10 ° ✓ 12		daigua n City	NY GA	144 314
h	Wolf		8503 E. G	14		reka	CA	955
hy	Dobbi	ns	639 E Clay	18		nisa <b>n</b>	MI	494
	Gage		677 S. Ch	24		oon field	NJ	070
	Pratt		34423 E.	36		ose	NY	105
а	Tracy	1	777 W Ste	48		egent Bluff	' IA	510
5	Lowe		938 West	Laura T		nter Park	FL	327
3	Stern	1	10773 E.	Up	Ħ	r nati	OH	452
	Root		32104 S 1	STh Pky		arge	UT	847
	МсМа	hon	720 S.E. F	Dow	n X	lyn	NY	112
to i		al II ano	rama char	Othe	er	each co	olumn p	ropo

Use the **Text** menu to change the font and size of the text displayed in the data sheet.

When you change the size of the text Panorama changes with width of each column proportionally, so that you do not need to adjust the widths of the columns.

ŀ	First	Last	Address	City	State	Zip	Phone	
Ŀ				-				
_	Barbara	Moldenhauer		Canandaigua	NY	14425	(716) 840-5619	
-	Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0659	
Π.	Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9673	
1	Timonthy	Dobbins	639 E Clayton Ln	Jenison	MI	49428	(616) 833-5134	
	Kelly	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6456	
٩.	Marilyn	Pratt	34423 E. Hunt Rt	Montrose	NY	10548	(914) 810-7069	
	Theresa	Tracy	777 W Stewart Way	Sargent Bluff	IA	51054	(712) 547-5613	
	Charles	Lowe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8747	
۰.	Michelle	Stern	10773 E. Pioneer Dr	Cincinnati	OH	45207	(513) 407-5547	
	Kathy	Root	32104 S 18Th Pkwy	St George	UT	84770	(801) 611-9225	
	George	McMahon	720 S.E. Florence Ter	Brooklyn	NY	11204	(718) 488-9771	
	Anthony	Goldman	29710 S.W Bay Place	Pensacola	FL	32514	(904) 968-3152	
	Judith	Lerner	5966 W Millwood Stree	Beaumont	TΧ	77704	(409) 875-3648	
	Robert	Nielsen	565 N Capital Ln	De Leon	TΧ	76444	(817) 419-0219	
	Alfred	Coats	808 N Jackson Lane	West Islip	NY	11795	(516) 707-3192	
	Edward	Kramer	44944 S.E. Beacon Ave	Corvallis	OR	97333	(541) 912-7577	

Use the Save command (File menu) to save the new configuration.

# Sorting the Database

Now that the database is filled with sample data you can try out Panorama's commands for organizing data. To sort by zip code start by clicking anywhere in the Zip column.

۲	00		My Mai	ling List				
٠	First	Last	Address	City	State	Zip	Phone	4
2	Barbara	Moldenhauer	155 Elm Ter	Canandaigua	NY	14425	(716) 840-5619	
¥	Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0659	1
	Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9673	
55	Timonthy	Dobbins	639 E Clayton Ln	Jenison	MI	49428	(616) 833-5134	- 1
<b>4</b>	Kelly	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6456	
-	Marilyn	Pratt	34423 E. Hunt Rt	Montrose	NY	10548	(914) 810-7069	
	Theresa	Tracy	777 W Stewart Way	Sargent Bluff	IA	51054	(712) 547-5613	

click anywhere in this column

Now choose **Sort Up** from the Sort menu.

File	Edit	View	Fields T	ext	Search	Sort	Math	Setup	Wizar	ds	D
	0	0			My M	Sort	Up	N	жU		
	•	First	Last	Addres	s	Sort	Up Wit	hin	Phone		<b></b>
	29.	Barbara	Moldenhauer	155 Elr	n Ter					-5619	14
	¥	Karen	Bryant	3595 E	5Th Blvd.	Sort	Down			-0659	
		Deborah	Wolf	8503 E	. Glenbrook A	Cort	Down V	Nithin		-9673	
	33	Timonthy	Dobbins	639 E (	Clayton Ln	2011	Down	within		-5134	
	۵.	Kelly	Gage	677 S.	Charlotte Lar					-6456	
		Marilyn	Pratt	34423	E. Hunt Rt	Gro	up Up			-7069	
	→	Theresa	Tracy	777 W	Stewart Way		t Bluff b	51054		-5613	
	- La	Charles	Lowe	938 We	est Laura Tra	Gro	up Dow	n 32793 -		-8747	
	_	Michelle	Stern	10773	E. Pioneer Dr	Gro	un i			-5547	
		Kathy	Root	32104	S 18Th Pkwy	GIU	up u			-9225	
		George	McMahon	720 S.	E. Florence Te	Brook	vn N			-9771	
		Anthony	Goldman	29710	S.W Bay Plac	Sort	by Cold	or 32514		3-3152	
		Judith	Lerner	5966 Y	/ Millwood St	Cro	up by C	alor		-3648	
		Robert	Nielsen	565 N I	Capital Ln	GIU	up by C	0101		-0219	
		Alfred	Coats	808 N -	Jackson Lane					-3192	
		Edward	Kramer	44944	S.E. Beacon #	Out	line Lev	el		:-7577	
		Betty	Curry	120 S.	Hall Street	Phoeni		z 85015	(602) 74	-0954	
		Ronald	Kuhn	11753	E Timber Rd.	Dam	dave C.M	E		-1356	
		Marilyn	Holmes	348 W	Stuart Cir	Kerr	love Sul	mmaries.	·(412) 73	i-1934	
		Gerald	Palmer	259 E.	Baker PI	Rem	ove De	tail		-9409	
		Alan	Hoflin	427 E F	Poplar Ln	Falls C	hurch V	A 22042		-7251	
		Rhonda	Barr	285 S.	Custer Cir	Depoe	Bay a O	R 97341	(503) 94	-9082	
		Albert	Ineland	690 N.	Clarendon Dr	log	gle Sum	nmary Lev	/el	-6233	v
		Dakasak	sible/201 total	1175-	< + (				0	0700	

Panorama will sort the database as soon as you release the mouse. Notice that the zip code you originally clicked on is still highlighted. If you want to see the first zip code you'll need to use the vertical scroll bar to move to the top of the database.

First	Last	Address	City	State	Zip	Phone
Ronald	Kuhn	11753 E Timber Rd.	Eastport	ME	04631	(207) 339-1356
<ul> <li>Kristin</li> </ul>	McFarland	3010 North Au Place	Waterbury	VT	05676	(802) 624-7185
🔲 Nicolo	Weber	7340 S. Harvey St.	Windham	CT	06280	(203) 500-8620
Gerald	Gilman	476 N.W. Clinton Pkwy	Norwalk	CT	06851	(203) 735-5038
Kelly 👘	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6456
- William	Mester	869 E Kellogg Ln	Orange	NJ	07050	(201) 790-8724
Henry	Nicholson	21929 E Emerald Place	Newark	NJ	07105	(201) 276-9221
Phyllis	Wagner	23091 S.E. American P	Paterson	NJ	07509	(201) 248-6513
Janice	Lebaily	851 N.E. Linwood Ln	Palisades Park	NJ	07650	(201) 631-5593
Grace	Day	8421 North Rock Pkwy	Fair Haven	NJ	07704	(201) 960-9540
Joseph	Hartley	41730 W Bethany Blvd	Colts Neck	NJ	07722	(908) 726-1158
Herbert	Schob	7658 S Cove Rd	Sea Bright	NJ	07760	(201) 738-8741
Harold	Swan	656 North Beverly Loo	Sea Grit	NJ	08750	(201) 248-7440
Marilyn	Connors	6955 South Industrial /	New York	NY	10027	(212) 496-7932
Brian	Robbins	610 E. 7Th Ter	Staten Island	NY	10312	(718) 570-9020
Ralph	Waldron	415 N Belmont Way	Bronx	NY	10458	(212) 966-8160
Marilyn	Pratt	34423 E. Hunt Rt	Montrose	NY	10548	(914) 810-7069
Phyllis	Bengston	366 S.E. Trenton Dr.	Ossining	NY	10562	(212) 517-3722
Douglas	Ponce	43131 N. 33Rd Ave	Pound Ridge	NY	10576	(914) 611-3249
George	McMahon	720 S.E. Florence Ter	Brooklyn	NY	11204	(718) 488-9771
Fred	Albrecht	146 W Sutton Loop	Mernick	NY	11566	(516) 636-0746
Carl	Mackay	35079 North Duncan St	Sea Cliff	NY	11579	(516) 629-1468
Evelyn	Oliver	40814 W Lamar Apt	Woodmere	NY	11598	(516) 901-9881

# Sorting By Two or More Fields

You can sort by as many fields as you like. In this example you will sort by cities within states. The first step is to sort by states. To do this click anywhere in the **State** field and choose **Sort Up** from the Sort menu.

0	0		My Mai	ling List				
•	First	Last	Address	City	State	Zip	Phone	
22	Ronald	Kuhn	11753 E Timber Rd.	Eastport	ME	04631	(207) 339-1356	1
¥	Kristin	McFarland	3010 North Au Place	Waterbury	VT	05676	(802) 624-7185	
	Nicole	Weber	7340 S. Harvey St.	Windham	CT	06280	(203) 500-8620	1
35	Gerald	Gilman	476 N.W. Clinton Pkwy	Norwalk	СТ 💧	06851	(203) 735-5038	-
۵.	Kelly	Gage	677 S. Charlotte Lane	Bloomfield	NJ	07003	(201) 947-6456	
-	William	Mester	869 E Kellogg Ln	Orange	NJ	07050	(201) 790-8724	

click anywhere in State field...

then Sort Up



Now the database is sorted by state, but the cities within each state are still out of order. For example, Hialeah should be the first state within Florida (FL) and Atlanta should be the first city within Georgia (GA).

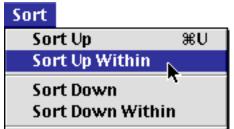
First	Last	Address	City	State	Zip	Phone
Kathleen	Bills	7930 E. Brown St	Colusa	CA	95932	(916) 582-2423
Christine	Benjamin	601 W Chester Lane	Grand Lake	CO 👘	80447	(970) 823-0165
Nicole	Weber	7340 S. Harvey St.	Windham	СТ	06280	(203) 500-8620
Gerald	Gilman	476 N.W. Clinton Pkwy	Norwalk	CT	06851	(203) 735-5038
Margaret	Poulsen	9144 W. Dupont Rd	Washington	DC	20010	(202) 908-7836
Pamela	Walsh	313 East Bryant Cir.	Newark	DE	19702	(908) 951-1493
Jerome	Frank	551 N. 42Nd Ct	Newark	DE	19713	(302) 633-7506
Christina	Gutierrez	45151 S. Marion Ave	Saint Augustin	FL	32084	(904) 954-8188
Anthony	Goldman	29710 S.W Bay Place	Pensacola	FL	32514	(904) 968-3152
Beverly	Reilly	464 S.E. Jones Cir.	Reddick	FL	32686	(352) 888-4646
Charles	Lowe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8747
Doris	Zawistowsky	4893 North Smith Stre	Orlando	FL	32861	(407) 865-4111
Lenoard	Byrd	574 S. Lakeview Circle	Melbourne	FL	32904	(407) 255-1502
Allen	Reese	24328 North Camden S	Hialeah	FL	33015	(305) 792-9606
Theresa	Dunn	7425 N.W. Warner Ave	Miami	FL	33151	(305) 616-2883
Deborah	Ragsdale	113 Erie Ln	Miami	FL	33152	(809) 812-0788
Anna	McKinney	876 East Johnson Ln	Lakeland	FL	33809	(813) 934-4566
Catherine	Maclean	536 North Manning Dr.	Ocala	FL	34482	(904) 803-3997
Eleanor	Carlson	201 East Clark Trail	Lithoma	GA	30058	(404) 760-6826
Daniel	Mason	6086 N.E. Augusta Apt	Tucker	GA	30084	(404) 724-6523
Craig	Berlin	8727 N Bristol Ave	Atlanta	GA	30309	(404) 765-2383
Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0659
Andrew	Ackerman	899 E. Deer Cir	Waipahu	HI	96797	(808) 557-7523

To sort the cities within the states first click anywhere in the City field, then choose **Sort Up Within** from the Sort menu. Be sure to choose **Sort Up Within**, not **Sort Up**.

۲	0		My Mai	ling List				
٠	First	Last	Address	City	State	Zip	Phone	
22	Kathleen	Bills	7930 E. Brown St	Colusa	CA	95932	(916) 582-2423	1
¥	Christine	Benjamin	601 W Chester Lane	Grand Lake_	CO	80447	(970) 823-0165	
	Nicole	Weber	7340 S. Harvey St.	Windham 5	СТ	06280	(203) 500-8620	
Ē:	Gerald	Gilman	476 N.W. Clinton Pkwy	Norwal	СТ	06851	(203) 735-5038	
≛	Margaret	Poulsen	9144 W. Dupont Rd	Washington	DC	20010	(202) 908-7836	

click anywhere in the City field...

# then Sort Up Within



The database is still sorted by state, but now the cities are sorted within each state as well.

First	Last	Address	City	State	Zip	Phone	
Christine	Benjamin	601 W Chester Lane	Grand Lake	CO	80447	(970) 823-0165	í.
Gerald	Gilman	476 N.W. Clinton Pkwy	Norwalk	CT	06851	(203) 735-5038	
	Weber	7340 S. Harvey St.	Windham	СТ	06280	(203) 500-8620	
Margaret	Poulsen	9144 W. Dupont Rd	Washington	DC	20010	(202) 908-7836	
Pamela	Walsh	313 East Bryant Cir.	Newark	DE	19702	(908) 951-1493	
Jerome	Frank	551 N. 42Nd Ct	Newark	DE	19713	(302) 633-7506	
Allen	Reese	24328 North Camden S	Hialeah	FL	33015	(305) 792-9606	
Anna	McKinney	876 East Johnson Ln	Lakeland	FL	33809	(813) 934-4566	
Lenoard	Byrd	574 S. Lakeview Circle	Melbourne	FL	32904	(407) 255-1502	
Theresa	Dunn	7425 N.W. Warner Ave	Miami	FL	33151	(305) 616-2883	
Deborah	Ragsdale	113 Erie Ln	Miami	FL	33152	(809) 812-0788	
Catherine	Maclean	536 North Manning Dr.	Ocala	FL	34482	(904) 803-3997	
Doris	Zawistowsky	4893 North Smith Stre	Orlando	FL	32861	(407) 865-4111	
Anthony	Goldman	29710 S.W Bay Place	Pensacola	FL	32514	(904) 968-3152	
Beverly	Reilly	464 S.E. Jones Cir.	Reddick	FL	32686	(352) 888-4646	
Christina	Gutierrez	45151 S. Marion Ave	Saint Augustine	FL	32084	(904) 954-8188	
Charles	Lowe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8747	
Craig	Berlin	8727 N Bristol Ave	Atlanta	GA	30309	(404) 765-2383	
Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0659	
Eleanor	Carlson	201 East Clark Trail	Lithoma	GA	30058	(404) 760-6826	
Daniel	Mason	6086 N.E. Augusta Apt	Tucker	GA	30084	(404) 724-6523	
Andrew	Ackerman	899 E. Deer Cir	Waipahu	ні	96797	(808) 557-7523	
Derrick	Berg	8275 E Morris St	Carter Lake	IA	51510	(402) 637-8209	

You can use **Sort Up Within** as many times as you wish in your database. For example, you could now sort the last names within each city. To learn more about sorting see "<u>Sorting</u>" on page 325.

# Finding a Person

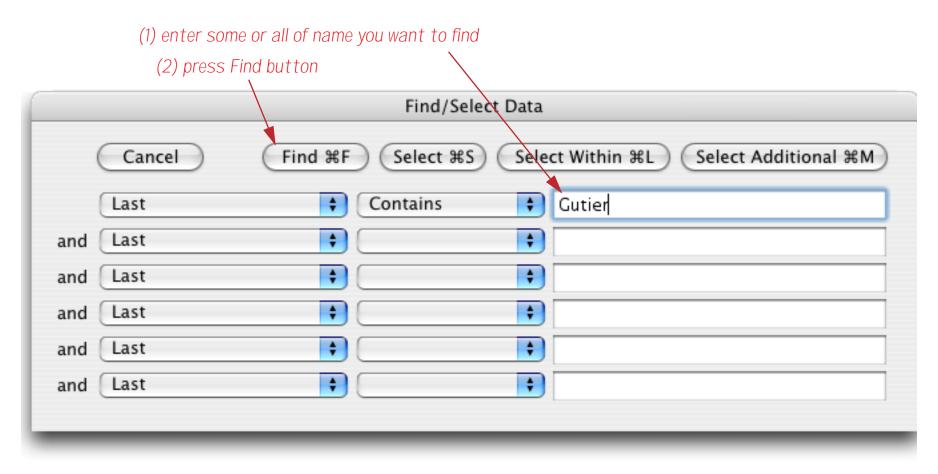
To search for someone's last name in the database you first need to click somewhere in the Last column.

First         Last         Address         City         State         Zip         Phone           Christine         Benjamin         601 W Chester Lane         Grand Lake         C0         80447         (970) 823-0165           Gerald         Gilman         476 N.W. Clinton Pkwy         Norwalk         CT         06851         (203) 735-5038           Nicole         Weber         7340 S. Harvey St.         Windham         CT         06280         (203) 500-8620           Margaret         Poulsen         9144 W. Dupont Rd         Washington         DC         20010         (202) 908-7836           Pamela         Walsh         313 East Bryant Cir         Newark         DE         19702         (908) 951-1493	0	0		My Mai	ling List				
Gerald         Gilman         Gilman<	۰	First	Last	Address	City	State	Zip	Phone	
Nicole         Weber         7340 S. Harvey St.         Windham         CT         06280         (203) 500-8620           Margaret         Poulsen         9144 W. Dupont Rd         Washington         DC         20010         (202) 908-7836	2	Christine	Benjamin	601 W Chester Lane	Grand Lake	CO	80447	(970) 823-0165	1
Nicole         Weber         7340 S. Harvey St.         Windham         CT         06280         (203) 500-8620           Margaret         Poulsen         9144 W. Dupont Rd         Washington         DC         20010         (202) 908-7836	ħ	Gerald	Gilman 🚽	476 N.W. Clinton Pkwy	Norwalk	CT	06851	(203) 735-5038	- 11
The galet To about Still In the stand of the		Nicole			Windham	CT	06280	(203) 500-8620	
Pamela Walsh 313 East Bryant Cir Newark DF 19702 (908) 951-1493	11	Margaret	Poulsen	9144 W. Dupont Rd	Washington	DC	20010	(202) 908-7836	
a randa maini orozastoryanton. nemant oz roroz (rooy ror riro	≛	Pamela	Walsh	313 East Bryant Cir.	Newark	DE	19702	(908) 951-1493	

Now choose the **Find/Select** command from the Search menu.

Search	
Find/Select	ЖF
Formula Find/\$:lect	
Select All	жA
Find Next	ЖG
Change	

Type some or all of the name you wish to find into the dialog. In this case we what to search for Gutierrez so we will enter the first few letters of the name. (The more of the name you type in the less chance there will be for a false match with someone else.)



When you press the **Find** button Panorama will locate Ms. Gutierrez.

ļ	First	Last	Address	City	State	Zip	Phone
2	Christine	Benjamin	601 W Chester Lane	Grand Lake	CO	80447	(970) 823-0165
-	Gerald	Gilman	476 N.W. Clinton Pkwy	Norwalk	CT	06851	(203) 735-5038
	Nicole	Weber	7340 S. Harvey St.	Windham	CT	06280	(203) 500-8620
2	Margaret	Poulsen	9144 W. Dupont Rd	Washington	DC	20010	(202) 908-7836
,	Pamela	Walsh	313 East Bryant Cir.	Newark	DE	19702	(908) 951-1493
	Jerome	Frank	551 N. 42Nd Ct	Newark	DE	19713	(302) 633-7506
	Allen	Reese	24328 North Camden S	Hialeah	FL	33015	(305) 792-9606
E.	Anna	McKinney	876 East Johnson Ln	Lakeland	FL	33809	(813) 934-4566
-	Lenoard	Byrd	574 S. Lakeview Circle	Melbourne	FL	32904	(407) 255-1502
	Theresa	Dunn	7425 N.W. Warner Ave	Miami	FL	33151	(305) 616-2883
	Deborah	Ragsdale	113 Erie Ln	Miami	FL	33152	(809) 812-0788
	Catherine	Maclean	536 North Manning Dr.	Ocala	FL	34482	(904) 803-3997
	Doris	Zawistowsky	4893 North Smith Stre	Orlando	FL	32861	(407) 865-4111
	Anthony	Goldman	29710 S.W Bay Place	Pensacola	FL	32514	(904) 968-3152
	Beverly	Reilly	464 S.E. Jones Cir.	Reddick	FL	32686	(352) 888-4646
	Christina	Gutierrez	45151 S. Marion Ave	Saint Augustine	FL	32084	(904) 954-8188
	Charles	Lowe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8747
	Craig	Berlin	8727 N Bristol Ave	Atlanta	GA	30309	(404) 765-2383
	Karen	Bryant	3595 E 5Th Blvd.	Garden City	GA	31408	(912) 528-0659
	Eleanor	Carlson	201 East Clark Trail	Lithoma	GA	30058	(404) 760-6826
	Daniel	Mason	6086 N.E. Augusta Apt	Tucker	GA	30084	(404) 724-6523
	Andrew	Ackerman	899 E. Deer Cir	Waipahu	HI	96797	(808) 557-7523
	Dernick	Berg	8275 E Morris St	Carter Lake	IA	51510	(402) 637-8209

# **Finding Multiple People**

Suppose you want to look up someone who's first name is Alan, but you're not sure what the last name is. Start by clicking anywhere in the First column.

•	0	My Mailing List						
	First	Last	Address	City	State	Zip	Phone	
2	Christine	Benjamin	601 W Chester Lane	Grand Lake	CO	80447	(970) 823-0165	1
~	Genald	Gilman	476 N.W. Clinton Pkwy	Norwalk	CT	06851	(203) 735-5038	
	Nicole 🕰	Weber	7340 S. Harvey St.	Windham	CT	06280	(203) 500-8620	
÷	Margaret	Poulsen	9144 W. Dupont Rd	Washington	DC	20010	(202) 908-7836	
	Pamela	Walsh	313 East Bryant Cir.	Newark	DE	19702	(908) 951-1493	
-	Jerome	Frank	551 N. 42Nd Ct	Newark	DE	19713	(302) 633-7506	
		-					/>	

Now choose the **Find/Select** command and type in the name Alan.

	Find/Select Data
Cancel	Find #F Select #S Select Within #L Select Additional #M
First	Contains 🗘 Alan
and First	;

When you press the **Find** button Panorama will find the first person named Alan in the database.

0	0	) 🔿 My Mailing List							
•	First	Last	Address	City	State	Zip	Phone		
29	Alan	Harrison	93 Morton Ter	San Diego	CA	92123	(619) 783-1965	1	
¥	Sandra	Cain	3975 S.W 1St Parkway	San Diego	CA	92154	(619) 297-5327		
≁	Edward	Hasson	429 W Harvey Cir	San Gabriel	CA	91776	(818) 990-1793		

If this isn't the Alan you were looking for choose Find Next from the Search menu.

Search						
Find/9	Find/Select %F					
Formu	Formula Find/Select					
Select	t All	ЖA				
Find N	lext 📐	ЖG				
Chang	je ``					

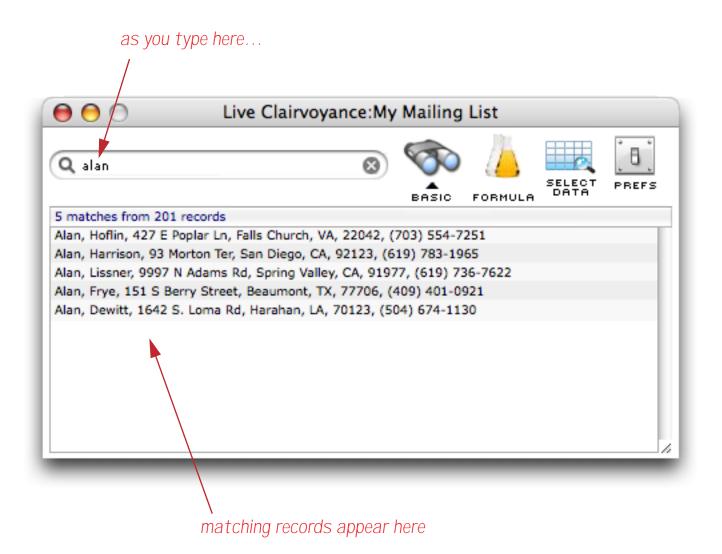
Panorama will skip to the next Alan in the database.

0	0		My Mailing List					
Þ	First	Last	Address	City	State	Zip	Phone	
22	Alan	Harrison	93 Morton Ter	San Diego	CA	92123	(619) 783-1965	1
¥	Sandra	Cain	3975 S.W 1St Parkway	San Diego	CA	92154	(619) 297-5327	
<b>7</b>	Edward	Hasson	429 W Harvey Cir	San Gabriel	CA	91776	(818) 990-1793	
57	Margaret	Naylor	7825 N Somerset Stree	San Leandro	CA	94577	(415) 343-9476	
۵	Lawrence	Rodriguez	675 E Shasta Trail	San Pedro	CA	90733	(213) 834-2554	1
	Anthony	Dorfman	274 South 21St Dr.	Santa Rosa	CA	95405	(707) 910-4598	
₽	Michelle	Schultz	25307 West Fairmount	Sebastopol	CA	95472	(707) 406-2284	
-	Alan	Lissner	9997 N Adams Rd	Spring Valley	CA	91977	(619) 736-7622	
-	Philip	Shipley	400 N Dupont Trail	Stockton	CA	95209	(209) 210-8495	

You can continue using the Find/Next command until you have located every Alan in the database.

#### Introducing the Live Clairvoyance<sup>™</sup> Wizard

Searching is one of the most important functions of any database program, so Panorama has more than one technique for searching. The Live Clairvoyance<sup>™</sup> wizard searches your database as you type. To use this wizard select **Live Clairvoyance** from the Search menu and type in the word or phrase you are looking for.



As you type in each letter the wizard shows you the records that match. In this case there are five records with the name **Alan**. To see more information about one of these matches simply double click on the line in the wizard. The wizard will locate the corresponding record in the database itself.

00	L	ive Clairv	oyance:My	Mailing	List				
Q, alan			8	BASIC	FORMULA	SELECT DATA	PREFS		
5 matches from 20									
Alan, Hoflin, 427 E									
Alan, Harrison, 93				-					
Alan, Lissner, 9997									
Alan, Frye, 151 S B	-			-					
Alan, Dewitt, 1642	S. Loma F	td, Harahan, I	LA, 70123, (504	4) 674-113	30				
	● ● \			My Ma	iling List				
•	First	Last	Address		City	State	Zip	Phone	
<u>.</u> ~	Alan Daniel	Frye Barker	151 S Berry 371 W. Prim		Beaumont Buda	TX TX	77706 78610	(409) 401-0921 (512) 887-2741	
	Steven	Michael	7185 Jackso		Conroe	TX	77301	(409) 951-1982	

We use the Live Clairvoyance wizard again in a few minutes, but if you want to jump ahead and learn all about this wizard see "<u>The Live Clairvoyance™ Wizard</u>" on page 345.

# **Selecting Instead Of Finding**

A third way to locate every person named **Alan** is to **select** the information (see "<u>Finding vs. Selecting</u>" on page 333). To do this click in the First column and choose the **Find/Select** command, but press the **Select** button instead of the **Find** button.

	Find/Select Data
Cancel	Find %F Select %S Select Within %L Select Additional %M
First	Contains 🗘 Alan
and First	

Most of the database will disappear. In fact, only the records containing the first name Alan will remain visible (selected). Everything else is temporarily invisible. Panorama displays the number of selected records in the lower left hand corner of the window. In this case five records contain the first name Alan. We say that these five records are the **selected** records. The other 196 records are invisible (unselected).

First	Last	Address	City	State	Zip	Phone
Alan	Harrison	93 Morton Ter	San Diego	CA	92123	(619) 783-1965
Alan	Lissner	9997 N Adams Rd	Spring Valley	CA	91977	(619) 736-7622
Alan	Dewitt	1642 S. Loma Rd	Harahan	LA	70123	(504) 674-1130
Alan	Frye	151 S Berry Street	Beaumont	TΧ	77706	(409) 401-0921
Alan	Hoflin	427 E Poplar Ln	Falls Church	VA	22042	(703) 554-7251
	five se	elected records con	tain the name	Alan		

You can also select data with the **Live Clairvoyance** wizard. First locate the data you want to select in the wizard, then press the Select Data tool. In this case we've used this technique to select everyone in the database named **Raymond**.

0 0	Live Cl	airvoyance:M	y Mailing	List			
<b>Q</b> raymond		8	BASIC	FORMULA	SELECT DATA	PRE	FS
4 matches from	201 records				$\gamma$		
Raymond, Fowle	er, 25027 North Coop	er Parkway, Wildon	nar, CA, 925	95, (909) 769	5153		
Raymond, Oswa	ld, 30594 S Chesape	ake Avenue, Portla	nd, OR, 972	33, (503) 23	5-4834		
Raymond, Hend	rickson, 30953 S.W P	oplar Blvd., Los Ar	igeles, CA, 9	0035, (213)	724-2175	5 - C	
Raymond, Sanch	hez, 59 W. Palmetto (	Cir., Greenville, ME,	04441, (20	7) 241-7088			
							11
			•				
			My	Mailing Li	st		
				0.1			-

First	Last	Address	City	State	Zip	Phone
Raymond	Fowler	25027 North Cooper Pa	Wildomar	CA	92595	(909) 769-5153
Raymond	Oswald	30594 S Chesapeake Av	Portland	OR	97233	(503) 235-4834
Raymond	Hendrickson	30953 S.W Poplar Blvd	Los Angeles	CA	90035	(213) 724-2175
Raymond	Sanchez	59 W. Palmetto Cir.	Greenville	ME	04441	(207) 241-7088
-						

Х

# Using the Sounds Like Option

If you don't know exactly how something is spelled you can try using Panorama's **sounds like** option. To use this option open the **Find/Select** dialog and use the middle pop-up menu to select **Sounds Like**. (Shortcut: You can open the **Find/Select** dialog by clicking on the number of records in the lower left hand corner.)

Contains Not Contains Begins With Ends With Equal Not Equal Less Than Greater Than Less/Equal Greater/Equal Sounds Like Match MatchExact

Here's what the dialog looks like after you make this selection.

	Find/Select Data
Cancel	Find #F Select #S Select Within #L Select Additional #M
First	🗘 Sounds Like 🗘 Alan
and First	÷

Alan         Harrison         93 Morton Ter         San Diego         CA         92123         (619) 783-1965           Alan         Lissner         9997 N Adams Rd         Spring Valley         CA         91977         (619) 736-7622           Alan         Lissner         9997 N Adams Rd         Spring Valley         CA         91977         (619) 736-7622           Allen         Reese         24328 North Camden S         Hialeah         FL         33015         (305) 792-9606           Alan         Dewitt         1642 S. Loma Rd         Harahan         LA         70123         (504) 674-1130           Alan         Frye         151 S Berry Street         Beaumont         TX         77706         (409) 401-0921           Alan         Hoflin         427 E Poplar Ln         Falls Church         VA         22042         (703) 554-7251	)	0		My Mailing List					
		First	Last	Address	City	State	Zip	Phone	
	2	Alan	Harrison	93 Morton Ter	San Diego	CA	92123	(619) 783-1965	
Allen         Reese         24328 North Camden S         Hialeah         FL         33015         (305) 792-9606           Alan         Dewitt         1642 S. Loma Rd         Harahan         LA         70123         (504) 674-1130           Alan         Frye         151 S Berry Street         Beaumont         TX         77706         (409) 401-0921           Alan         Hoflin         427 E Poplar Ln         Falls Church         VA         22042         (703) 554-7251		Alan	Lissner	9997 N Adams Rd		CA	91977	(619) 736-7622	
	1	Allen	Reese	24328 North Camden S	Hialeah	FL	33015	(305) 792-9606	
	1	Alan	Dewitt	1642 S. Loma Rd	Harahan	LA	70123	(504) 674-1130	
		Alan	Frye	151 S Berry Street	Beaumont	TΧ	77706	(409) 401-0921	
	4	Alan	Hoflin	427 E Poplar Ln	Falls Church	VA	22042	(703) 554-7251	

Panorama now selects six records instead of five, because the name Allen "sounds like" Alan.

The sounds like option isn't perfect, but it can find most similar sounds and spellings. You must, however, know the first letter of the word or name you are looking for. For example, the sounds like option will never think that the name Ellen sounds like Alan because the two names start with different letters.

# **Making More Complex Selections**

The **Find/Select** dialog make more complex selections based on multiple criteria. For example, suppose you want to select all people with zip codes from 50000 to 69999. Start by clicking on the Zip field, then open the **Find/Select** dialog. Use the pop-up menus to fill in the first two lines of the dialog, like this.

	Find/Select Data						
	Cancel	Find %F Select %S Select Within %L Select Additional	ЖМ				
	Zip	Greater/Equal 🗧 50000					
and	Zip	🗘 Less/Equal 🛟 69999					
and	Zip	÷ (* )					
and	Zip	•					
and	Zip	•					
and	Zip	•					
_							

When you press the **Select** button Panorama will select only the records in the requested zip code range, in this case 20 records.

	First	Last	Address	City	State	Zip	Phone
	Dernick	Berg	8275 E Morris St	Carter Lake	IA	51510	(402) 637-8209
-	Theresa	Tracy	777 W Stewart Way	Sargent Bluff	IA	51054	(712) 547-5613
1	Dernick	Viola	584 East Pico Circle	Champaign	IL	61824	(217) 623-0547
	Kelly	Nichols	271 S. Salem Ln	Niles	IL	60648	(312) 772-9278
l	William	Hoffman	10010 S.E. Crestview I	Topeka	KS	66612	(913) 975-3619
1	Linda	Nielsen	474 N. Campus Ct	Wichita	KS	67207	(316) 897-4863
	David	Tito	46 N.E. Williams Lane	Center City	MN	55012	(612) 455-9835
l	Evelyn	Kohn	39261 S Elmwood Pkw;	Owatonna	MN	55060	(507) 731-2800
۰.	Fred	Dahl	40670 W. Cardinal Pkw	Owatonna	MN	55060	(507) 587-2532
ł.	Phyllis	Fleming	46161 S. Chestnut Ave	Plymouth	MN	55442	(612) 754-4897
	Catherine	Gregory	449 East Fair Drive	Saint Paul	MN	55114	(612) 771-1074
l	Louise	Gonzalez	22350 N. Stevenson Pk	Saint Paul	MN	55127	(612) 214-6322
	Henry	Levy	14447 Elirving St	South Saint Pa	MN	55075	(612) 238-9944
	James	Cooper	523 North Village Cir	Washington	MO	63090	(314) 593-7974
ł	Stacey	Perkins	20143 Bishop Place	Elsie	NE	69134	(402) 526-8658
	Charles	Wall	7306 W. Bethany St.	Papillion	NE	68128	(402) 374-5680
	Fred	Dunham	841 S Plummer Way	Emery	SD	57332	(605) 295-8348
	Angela	Sherwood	31060 South Berkshire	Madison	WI	53702	(608) 292-8235
	Jason	Hale	21240 West Coleman A	Madison	WI	53716	(000) 564-6283
	Lorraine	Ponce	897 W. Cotati Circle	Wauwatosa	WI	53213	(414) 310-9096

Panorama can also make complex selections based on a formula. To do this use the **Formula Find/Select** command in the Search menu.

Search	
Find/Select	ЖF
Formula Find/Select	
Select All	ЖA
Find Next	₩G

Here is the formula for selecting zip codes in the range from 50000 to 69999.

	Find/Select Using Formula
Cancel	Find Select Select Within Select Additional
Zip >= "50000" and Zip	<= "69999"

Here is a formula that will select unusually long last names (more than 10 characters).

	Find/Select Using Formula						
Cancel	Find Select Select Within Select Additional						
length(Last) > 10							

When you press the **Select** button Panorama will select the five people in this database with extra-long last names.

0	🖲 🖯 My Mailing List							
•	First	Last	Address	City	State	Zip	Phone	
٠,	Raymond	Hendrickson	30953 S.W Poplar Blvd	Los Angeles	CA	90035	(213) 724-2175	1
¥	Doris		4893 North Smith Stre		FL	32861	(407) 865-4111	
	Barbara				NY	14425	(716) 840-5619	
33	Ronald	Zawistowsky	32438 N.W. Russell Av	Columbia Stati	OH	44028	(216) 557-6111	
۵.	Craig	Moldenhauer	624 E Culkin Dr.	Treuose	PA	19101	(215) 420-4750	
₽								

To learn more about selecting with a formula see "Formula Find/Select" on page 365 and "True/False Formulas" on page 1260.

#### **Complex Searches with the Live Clairvoyance Wizard**

The Live Clairvoyance wizard can also perform formula based searches — and it does so instantly as you type. To choose this option simply click the **Formula** icon in the tool bar type in the formula. You'll see some error messages as you type in the formula, just ignore them and keep typing. As soon as you've entered a valid formula the selected records will appear.

2. type in formula				
Eive Clairvoyance:My	Mailing	List		
Q Zip ≻= "50000" and Zip <= "69999" 🛞	BASIC	FORMULA	SELECT DATA	PREFS
20 matches from 201 records	BHSIC	FORMOLA		
Theresa, Tracy, 777 W Stewart Way, Sargent Bluff, IA, 5	1054, (712	) 547-5613		4
Henry, Levy, 14447 E Irving St, South Saint Paul, MN, 5				•
Angela, Sherwood, 31060 South Berkshire Ave, Madisor			-8235	1
Evelyn, Kohn, 39261 S Elmwood Pkwy, Owatonna, MN,				
Catherine, Gregory, 449 East Fair Drive, Saint Paul, MN,			ļ.	
Kelly, Nichols, 271 S. Salem Ln, Niles, IL, 60648, (312)				
Louise, Gonzalez, 22350 N. Stevenson Pkwy, Saint Paul,		, (612) 214-	6322	
Fred, Dunham, 841 S Plummer Way, Emery, SD, 57332,				
Charles, Wall, 7306 W. Bethany St., Papillion, NE, 68128				
Derrick, Viola, 584 East Pico Circle, Champaign, IL, 618				
Jason, Hale, 21240 West Coleman Ave, Madison, WI, 53				4
William, Hoffman, 10010 S.E. Crestview Pkwy, Topeka, I			519	•

3. Matching data will appear as you type

/

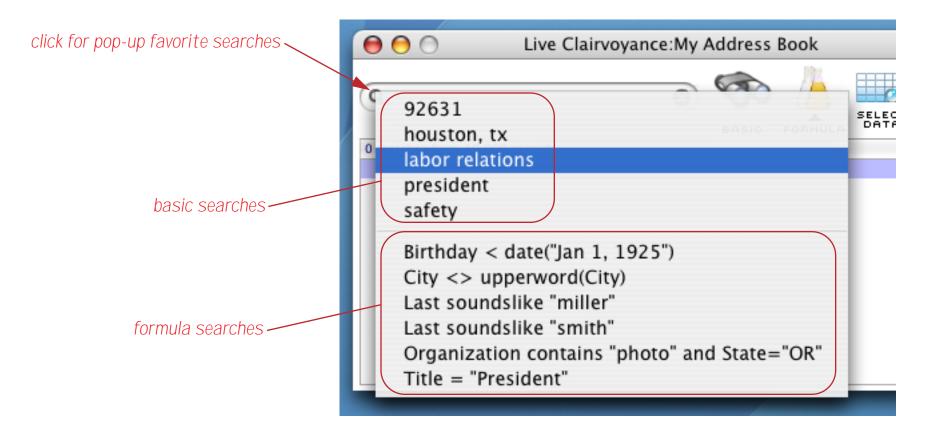
When you edit the formula the wizard automatically updates the results.

e o Live Clairvoyance:My Mailing List					
Q Zip >= "60000" and Zip <= "69999"	BASIC	FORMULA	SELECT DATA	PREFS	
7 matches from 201 records					
Kelly, Nichols, 271 S. Salem Ln, Niles, IL, 60648, (312)	772-9278				
Charles, Wall, 7306 W. Bethany St., Papillion, NE, 68128	3, (402) 374	1-5680			
Derrick, Viola, 584 East Pico Circle, Champaign, IL, 6182	24, (217) 6	23-0547			
William, Hoffman, 10010 S.E. Crestview Pkwy, Topeka, H	KS, 66612,	(913) 975-3	619		
Stacey, Perkins, 20143 Bishop Place, Elsie, NE, 69134, (	402) 526-8	658			
James, Cooper, 523 North Village Cir, Washington, MO, 6	53090, (314	4) 593-7974			
Linda, Nielsen, 474 N. Campus Ct, Wichita, KS, 67207, (	(316) 897-4	1863			
				//	

You can use any formula you like in this mode. When you want to go back to regular searching simply click on the **Basic** tool. See "Live Formula Searching" on page 347 for more information and tips on this feature.

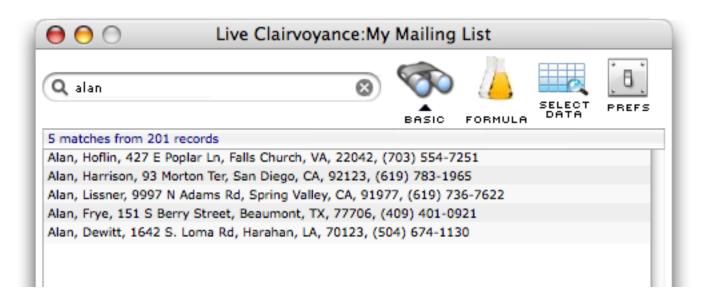
#### **Saving Your Favorite Searches**

The Live Clairvoyance wizard allows you to keep a pop-up menu of your favorite searches. Click the *Q* icon to see the pop-up menu.



The top section of the menu lists basic searches you have saved, while the bottom section lists formula searches. To perform a search simply select it from the menu. (The wizard will automatically switch to the correct search mode.)

To add a search to the menu start by typing the search into the box at the top. You may use either a basic or a formula search.



Now click the *Q* icon. You'll see a choice for adding your search to the menu, simply choose this option.

😝 🖯 🔿 Live Clairve	oyance:My	Mailing	List		
C Add "alan" to menu	8	BASIC	FORMULA	SELECT DATA	PREFS
5 matches from 201 records					
Alan, Hoflin, 427 E Poplar Ln, Falls Church,	VA, 22042, (	703) 554-7	251		
Alan, Harrison, 93 Morton Ter, San Diego, 0	CA, 92123, (6	19) 783-19	65		
Alan, Lissner, 9997 N Adams Rd, Spring Va	lley, CA, 9197	7, (619) 73	6-7622		
Alan, Frye, 151 S Berry Street, Beaumont,	TX, 77706, (	409) 401-09	921		
Alan, Dewitt, 1642 S. Loma Rd, Harahan, I	LA, 70123, (5	04) 674-113	30		
					_

The wizard will automatically add your search to the proper spot on the menu.

new menu item 🔍	00	Live Clairvoyance:My
	alan	8
	0 matches from 201	records

For more information on the **Favorite Searches** pop-up menu see "<u>The Favorite Searches Pop-up Menu</u>" on page 352.

# Selecting All Records

To make all of the invisible data re-appear choose **Select All** from the Search menu.

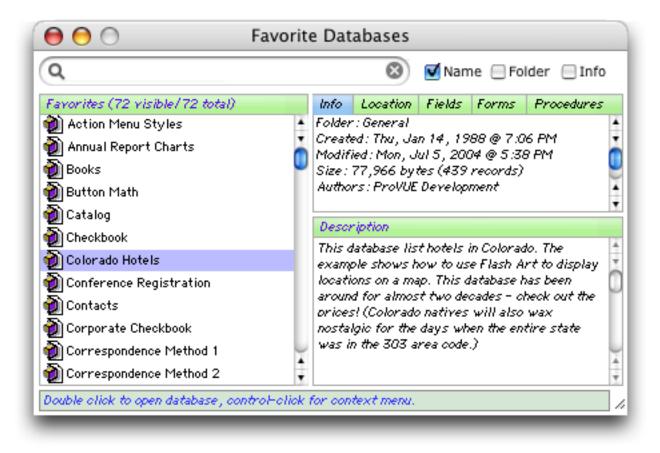
Search	
Find/Select	≋F
Formula Find/Select	
Select All 📐	жA
Find Next	ЖG
Change	

Panorama will display all of the data in the database again.

	First	Last	Address	City	State	Zip	Phone
2	Donald	Leach	16376 E Evans Rt	Fairbanks	AK	99707	(907) 442-7203
2	Henry	Burger	25063 S.W Leith Ave	Conway	AR	72032	(501) 216-1936
	Derrick	Bryan	526 W Mohawk Court	Fayetteville	AR	72703	(501) 937-3922
Ð	Michelle	Hutchinson	939 S Bonner Drive	Little Rock	AR	72223	(501) 899-8962
\$	Norman	Brazelton	2958 S. Portage Blvd	Chandler	AZ	85244	(602) 680-0751
	Renée	Lindsay	248 S.E. Utica Trail	Flagstaff	AZ	86002	(602) 991-5127
•	Herbert	Matthews	14244 N Valencia Rt	Higley	AZ	85236	(602) 635-3865
•	Richard	Comminges	838 E. Hill Ct	Peoria	AZ	85381	(602) 698-0222
-	Betty	Curry	120 S. Hall Street	Phoenix	AZ	85015	(602) 741-0954
-	Phillip	Wong	3765 S.E. 16Th Street	Riviera	AZ	86442	(602) 699-9355
-	Sharon	Blain	28071 S.W Cordova Bh	Acton	CA	93510	(805) 901-9201
	Harry	Kowalski	33153 N Waverly Blvd	Arcata	CA	95518	(707) 218-8647
	Harry	Gonzalez	937 E. Frederick Ln	Arcata	CA	95519	(707) 897-5532
	Evelyn	Lawlen	579 S.W Sequoia Cir	Berkeley	CA	94701	(415) 670-5367
	Cheryl	Scholl	440 N.W. Baker PI	Beverly Hills	CA	90211	(310) 828-9677
	Leonard	Phelps	746 East Tremont Trai	California City	CA	93505	(805) 985-4299
	Kathleen	Bills	7930 E. Brown St	Colusa	CA	95932	(916) 582-2423
	John	Chick	318 E. Atlantic Cir	Corona Del Mar	CA	92625	(714) 779-3814
	Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9673
	Linda	Bischoff	955 N. Harbor Cir.	Fresno	CA	93747	(209) 452-1355
	Darlene	Simpson	37054 South Greene Ap	Industry	CA	91746	(818) 247-5475
	Melissa	Wheeler	47677 W Burnside Dr	La Mesa	CA	91942	(619) 464-9001
	Raymond	Hendrickson	30953 S.W Poplar Blvd	Los Angeles	CA	90035	(213) 724-2175

#### Adding A Database To Your List Of Favorites

You can use Panorama's **Favorite Databases** wizard to help organize your databases and keep then accessible at your fingertips. To open this wizard choose **Favorite Databases** from the Wizards menu. The wizard displays a list of favorite databases on the left. If you click once on a database the wizard will show you information about that database. (Clicking twice opens the database itself.)



Page 37

To add your new database to the list of favorites, find the database in the Finder and drag it onto the Favorite Databases window.

My Mailing List	Tutoria	ial avorite Databases 🐼 🗹 Name 🗔 Folder (	Info
	Favorites (72 visible/72 total)         Action Menu Styles         Annual Report Charts         Books         Button Math         Catalog         Checkbooky Mailing List         Colorado Hotels         Conference Registration         Contacts         Correspondence Method 1         Correspondence Method 2         Double click to open database, control	Folder : General Created : Thu, Jan 14 , 1988 @ 7:06 PM Modified : Mon, Jul 5 , 2004 @ 5:38 PM Size : 77,966 bytes (439 records) Authors : ProVUE Development Description This database list hotels in Colorado. The example shows how to use Flash Art to d locations on a map. This database has bee around for almost two decades - check ou prices! (Colorado natives will also wax nostalgic for the days when the entire sta was in the 303 area code.)	n 0 It the

The wizard will add your new database to the list of favorites.

0 0	Favorite Databases
٩	🛞 🗹 Name 📃 Folder 📃 Info
Favorites (1 visible/72 total)	Info       Location       Fields       Forms       Procedures         Folder : Tutorial       Created : Wed, Sep 22, 2004 @ 5:31 PM       Image: Sep 22, 2004 @ 5:32 PM       Image: Sep 22, 2004 @ 5:32 PM         Modified : Wed, Sep 22, 2004 @ 5:32 PM       Size : 2,310 by tes (201 records)       Image: Sep 22, 2004 @ 5:32 PM         Description       Image: Sep 22, 2004 @ 5:32 PM       Image: Sep 22, 2004 @ 5:32 PM       Image: Sep 22, 2004 @ 5:32 PM

An alternate method for adding the database is to use the **Add Favorite** command in the **Edit** menu, then choose the database from the dialog.

	Choose a File	
	📁 Tutorial	÷
<ul> <li>Network</li> <li>Jaguar</li> <li>Classic</li> <li>Panther</li> <li>Alaska</li> <li>Fire Jaguar</li> <li>Fire Panther</li> <li>Fire Classic</li> <li>Fire Alaska</li> <li>ISightWeb ▲</li> <li>CocoaGest ▲</li> <li>Desktop</li> <li>Operations</li> <li>Applications</li> <li>Jimrea</li> <li>Documents</li> <li>Movies</li> </ul>	Name My Mailing List	Date Modified     Yesterday
New Folder	(	Cancel Choose

Once you have added your new file to the Favorites Wizard choose the **Save** command in the File menu and your database is permanently added to the list of favorites (see "<u>Removing a Favorite</u>" on page 64 if you later want to remove this favorite).

# **Closing a Database**

To close a database click on it (to bring it's window to the front). If the database has only one window you can close it by clicking on the window's close box. If the database has more than one window you can close each window individually or you can select the **Close File** command from the File menu. Close the My Mailing List database now.

File	
Logon	
Open File	жо
Close File 📐	жw
Save 🔨	жs
Save All	
Save As	
Save A Copy As	

Page 39

If the database has been modified since the last time it was saved Panorama will ask you if you want to save the changes. Press the **Save** button to save the changes.



The database is now closed, and the memory it was using is available for use with other databases. See "<u>Mon-itoring Memory Usage</u>" on page 152 to learn how to oversee Panorama's memory usage.

### **Re-Opening a Favorite File**

To re-open a favorite file, start by choosing the **Favorite Databases** wizard from the Wizards menu. Type **mail** into the search area at the top of the window to find your database.

🖲 🖯 🛛 Fa	avorite Databases
Q mail	🛞 🗹 Name 🗍 Folder 🗍 Info
Favorites (4 visible/73 total)	Info Location Fields Forms Procedures
📦 Mail Merge Method 1	Original file has been moved or deleted!
颧 Mail Merge Method 2	
颧 Mail Merge Method 3	
颧 My Mailing List	
	T
	Description

Double click the database name to open it.

Q mail			🛛 🗹 Name 📃	Folder 📃 Info	,		
avorites (4 visible/73 tot	al)	Info	Location Fields Forn	s Procedures			
Mail Merge Method 1 Folder :			Tutorial		4		
Mail Merge Method 2	Mail Marga Mathod 2			5:31 PM	•		
Mail Merge Method 3			d: Wed, Sep 22, 2004 @ ,310 bytes (201 record.				
		5/28.2	,510 bytes (2017ecord	>)	¥		
🕖 My Mailing List							
7					<b></b>		
7					Ŧ		
T					T		
T	00		My Ma	iling List	Ŧ		
	First	Last	My Ma Address	iling List <sub>City</sub>	▼ State	Zip	Phone
						Zip 99707	
	Donald	Last Leach Burger	Address	City	State		Phone (907) 442-7203 (501) 216-1936
<u>**</u>	Donald Henry	Leach	Address 16376 E Evans Rt	City Fairbanks	State	99707	(907) 442-7203
<u>**</u>	Donald Henry Derrick	Leach Burger	Address 16376 E Evans Rt 25063 S.W Leith Ave	City Fairbanks Conway	State AK AR	99707 72032	(907) 442-7203 (501) 216-1936
	Donald Henry Derrick Michelle	Leach Burger Bryan	Address 16376 E Evans Rt 25063 S.W Leith Ave 526 W Mohawk Court	City Fairbanks Conway Fayetteville	State AK AR AR	99707 72032 72703	(907) 442-7203 (501) 216-1936 (501) 937-3922

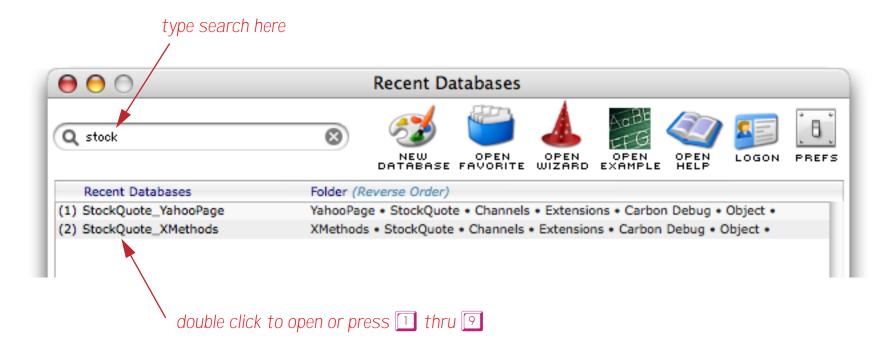
To learn more about this wizard see "<u>The Favorite Databases Wizard</u>" on page 60. Tip: If you hold down the **Control** key (Mac) or double click with the right mouse button (Windows PC) Panorama will automatically close the **Favorite Databases** window after it opens the selected database.

#### **Re-Opening a Recently Opened Database**

If you don't want to add your database to the **Favorite Databases** wizard you can still access it easily if you've opened it recently. To do this choose **Recent Databases** from the **File** menu. A list of recently accessed databases appears.

0 0	Recent Databases
٩	THE AND A CONTRACT OF A CONTRA
Recent Databases	Folder (Reverse Order)
<ol> <li>My Address Book</li> </ol>	Panorama Guided Tour • Panorama Demo Files • ProVUE • Documents • From Big
(2) Panorama Users	Carbon Debug • Object • Carbulator • Carborama • Alaska
(3) Panorama 3 Price List.pan	MegaDemo (Author Mode) • ProVUE Demos • ProVUE 99 CD (PC) • ProVUE 99 CD •
(4) Panorama 3 MegaDemo.pan	MegaDemo (Author Mode) • ProVUE Demos • ProVUE 99 CD (PC) • ProVUE 99 CD •
(5) Dial_Jon's Phone Tool	Jon's Phone Tool • Dial • Channels • Extensions • Carbon Debug • Object •
(6) Dial_Tones	Tones • Dial • Channels • Extensions • Carbon Debug • Object • Carbulator •
(7) StockQuote_YahooPage	YahooPage • StockQuote • Channels • Extensions • Carbon Debug • Object •
(8) StockQuote_XMethods	XMethods • StockQuote • Channels • Extensions • Carbon Debug • Object •
(9) General Ledger.pan	Databases • 2006 to Bob Smith • Year End • Operations • Documents • Home •
106th Congress	Congress • Reference • Examples • Carbon Debug • Object • Carbulator •
Customers	Screencasts • Examples • Carbon Debug • Object • Carbulator • Carborama • Alaska
Corporate Checkbook	Map Cache • Extensions • Carbon Debug • Object • Carbulator • Carborama •
Screencast Demo Launcher	Screencasts • Examples • Carbon Debug • Object • Carbulator • Carborama • Alaska
Properties.pan	Databases • 2006 to Bob Smith • Year End • Operations • Documents • Home •
HobbyShopCatalog	Hobby Shop • Server TiBook • MacFair 2005 • Demos & Seminars • Documents •

You can open any recent database by double clicking on it. The most recent nine databases can be opened by pressing the 1 thru 9 keys. You can also search the recently opened databases.



For more information on opening recent databases see "The Recent Databases Wizard" on page 59.

### **Transferring Data with VCards**

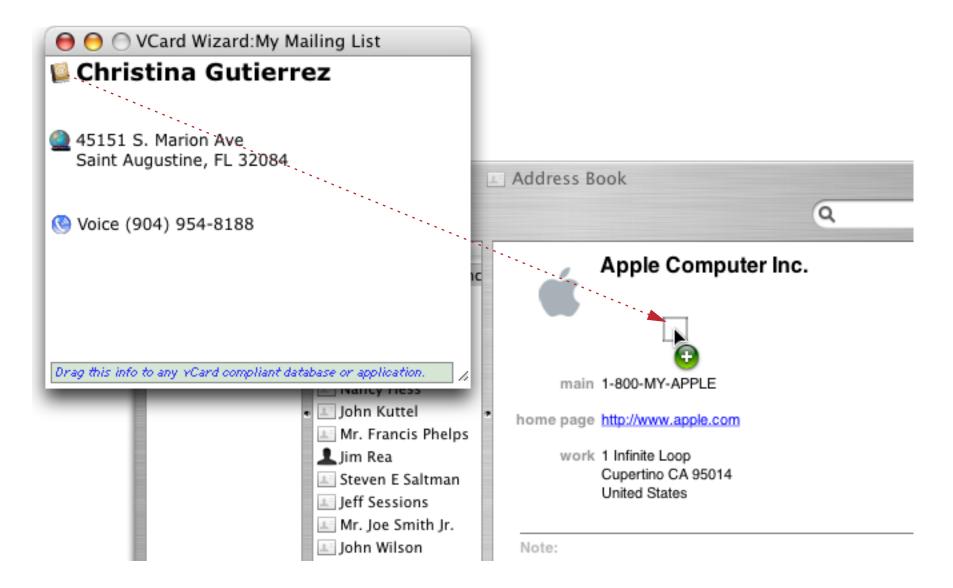
In this section we'll export a VCard to Apple's **Address Book** application. A properly configured Panorama database can exchange data with any VCard compatible application. In this case, the **New Database** wizard has done the configuration for us (see "<u>"Generic" Fields</u>" on page 236 to learn how to do this configuration yourself). The first step is to click on the record we want to transfer, in this case Christina Gutierrez.

۲	0		My Mailing List					
٠	First	Last	Address	City	State	Zip	Phone	
22	Beverly	Reilly	464 S.E. Jones Cir.	Reddick	FL	32686	(352) 888-4646	1
4	Christina	Gutierrez	45151 S. Marion Ave	Saint Augustin	FL	32084	(904) 954-8188	
<b>7</b>	Charles	Lowe	938 West Laura Trail	Winter Park	FL	32793	(407) 544-8747	
22							/····	

Open the **VCard Wizard**, which you'll find in the Utility submenu of the Wizard menu. The wizard displays the name, address and phone number of the currently selected person.



To transfer Ms. Gutierrez to the Address Book, drag the tiny book icon onto the Address Book window.



Page 42

The Address Book program will ask you to confirm that you want to add this person.



Press **OK** to add her to the Address Book.

$\Theta \Theta \Theta$	1	Address Book
		Q
Group	Name	Christina Gutierrez
Directories	Eric Bolden Beverly Bright	
	Anthony Goldman	other (904) 954-8188
	<ul> <li>Nancy Hess</li> <li>John Kuttel</li> <li>Mr. Francis Phelp</li> </ul>	work 45151 S. Marion Ave Saint Augustine FL 32084

Drag the other way to transfer from the Address Book to your database.

O O VCard Wizard:My M	ailing List	
📔 Christina Gutierr	ez	
45151 S. Marion Ave Saint Augustine FL 32084		Address Book
🔇 Voice (! 💷 🗖		C
Group	Name	John Kuttel
ali 🚺	🛯 🏙 Apple Computer 🔺	John Kutter
🚺 Directories	🖃 Eric Bolden 🛛 🔻	
Last Import	💷 Beverly Bright 🛛 🗻	
	🖃 Ron Furnare	
Drag this infe	🖃 Anthony Goldma	
brag and me	💷 Christina Gutierre	home (714) 846-1378
	🔹 🔝 Nancy Hess	work 16893 Algonquin St
	上 John Kuttel	Huntington Beach CA 92649-3810
	Ma Fassaia Dhala	,

John Kuttel is automatically added to the database.

	My Mail					
Last	Address	City	State	Zip	Phone	4
Hale	21240 West Coleman A	Madison	WI	53716	(000) 564-6283	
e Ponce	897 W. Cotati Circle	Wauwatosa	WI	53213	(414) 310-9096	- 1
McLean	39096 S.W Cameron Pk	Chas	WV	25304	(304) 823-2415	
Steinberg	29653 S.W Taubman BI	Clearmont	WY	82835	(307) 729-8985	- 1
Kuttel	16893 Algonquin St	Huntington Bea		92649-:	(714) 846-1378	
	Last Hale Ponce McLean Steinberg	Last Address Hale 21240 West Coleman A Ponce 897 W. Cotati Circle McLean 39096 S.W Cameron Pk Steinberg 29653 S.W Taubman Bl	Last Address City Hale 21240 West Coleman A Madison Ponce 897 V. Cotati Circle Wauwatosa McLean 39096 S.W Cameron Pk Chas Steinberg 29653 S.W Taubman BI Clearmont	Last     Address     City     State       Hale     21240 West Coleman A     Madison     WI       Ponce     897 W. Cotati Circle     Wauwatosa     WI       McLean     39096 S.W Cameron Pk     Chas     WV       Steinberg     29653 S.W Taubman BI     Clearmont     WY	LastAddressCityStateZipHale21240 West Coleman AMadisonWI53716Ponce897 W. Cotati CircleWauwatosaWI53213McLean39096 S.W Cameron PkChasWV25304Steinberg29653 S.W Taubman BIClearmontWY82835	Last         Address         City         State         Zip         Phone           Hale         21240 West Coleman A         Madison         WI         53716         (000) 564-6283           Ponce         897 W. Cotati Circle         Wauwatosa         WI         53213         (414) 310-9096           McLean         39096 S.W Cameron Pk         Chas         WV         25304         (304) 823-2415           Steinberg         29653 S.W Taubman BI         Clearmont         WY         82835         (307) 729-8985

The VCard wizard can also import and export groups of VCards at once. For more informations see "<u>Using</u> <u>Generic Fields with the VCard Wizard</u>" on page 242.

# **Displaying a Map**

Don't close the VCard wizard yet. It's now displaying the information for John Kuttel, who was just added to the database.



To see a map of Mr. Kuttel's location, click on the globe icon. The map will appear in your default web browser.

<b>000</b>	+ Mhttp://www			t Huntington Beach			at a Q. Google	
n Et St	Information of the second seco	DIRECTIONS	MAP	& Special Deals. s with ORBITZ!	coltar Cong Low I		e Photos & Morel d - Book Now	EL SS. Or
	Deals reet Map Marguest Der Store	Con Dr Heil Ave Barris Cr Barris Cr Barris Cr Barris Cr Barris Cr Barris Cr Barris Cr Barris Cr Barris Cr Barris Cr Commy L Science Commy L Sc	Print   E-Hall   Held Ave a Cardination St. Card a Cardination St. Card a Cardination St. Card a Ca	Chicas Harris La	I DOM	Hotels  Expedia: Hot Deals at Save up to S www.Exped  Discount Guaranteed U OrbitSaver H www.ORBIT  Cheap H0 Save Up to 7 Rates Guara www.hotels  Hotels Fo Fal Savings a Get Ready to Sock reserva www.Woodfin S Great deals, book reserva www.Woodfin S	Hotels west Rates on solets. Book Now! Z.com tels We on Rooms! Low tend - Book Online New Com r Less In Hotels! Relax - Book Today scity.com uites Huntington pacious sults	

# Transferring a Person from the White Pages

The **White Pages** wizard allows you to locate a person and add them to your database. You'll find this wizard in the Internet submenu of the Wizard menu.

😝 😑 🔘 White Pages
Search 🔞 Clear
First Last
City
State Zip Code
Displaying 0 of 0 📀 more

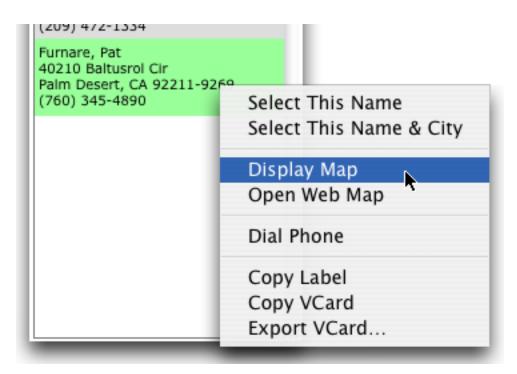
We're looking for Mr. or Mrs. Furnare somewhere in the Palm Springs area (California).

0	White Pages
🔍 se	earch 🔞 Clear
First	Last Furnare
City	
State	CA Zip Code
Display	ing 0 of 0 📀 more

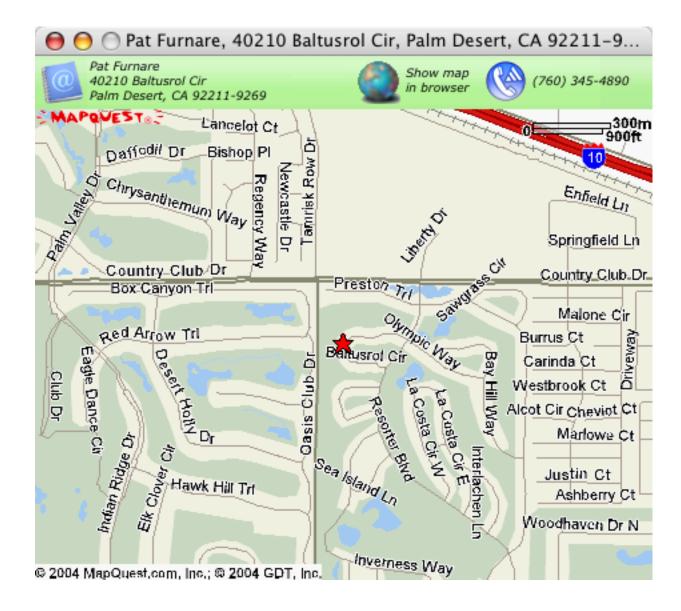
Press the **Search** button to see the results.

Q se	White	Clear
First City State		ost Furnare
Display	ng 3 of 0	😳 more
	, Charles	
	/intage Dr Cucamonga	a, CA 91737
Rancho -7704 Furnare 2884 W Stockto		Holt Dr

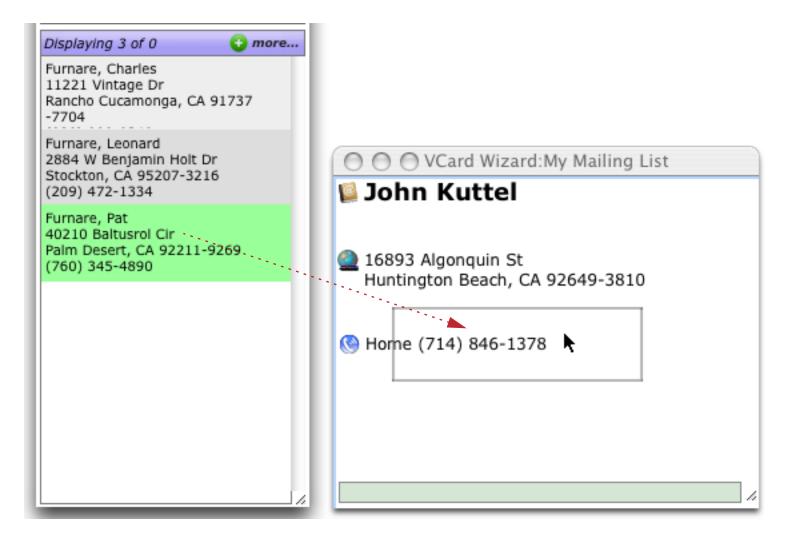
There's a Pat Furnare in Palm Desert. To verify that he's the one we're looking for we can display a map.



This wizard displays the map in Panorama itself instead of in your web browser.



To add Mr. Furnare to your My Mailing List file drag from the White Pages to the VCard Wizard.



Voila! The new entry has been added to the mailing list.

	0		My Mai					
	First	Last	Address	City	State	Zip	Phone	
2	Lorraine	Ponce	897 W. Cotati Circle	Wauwatosa	WI	53213	(414) 310-9096	i li
<	Kristin	McLean	39096 S.W Cameron Pk	Chas	W۷	25304	(304) 823-2415	
	Paul	Steinberg	29653 S.W Taubman BI	Clearmont	WY	82835	(307) 729-8985	
2	John	Kuttel	16893 Algonguin St	Huntington Bea	CA	92649-:	(714) 846-1378	
	Pat	Furnare	40210 Baltusrol Cir	Palm Desert	CA	92211-	(760) 345-4890	
								-1

To learn more about this wizard see "<u>White Pages</u>" on page 68.

# Printing the Data Sheet

Before actually printing the data sheet you'll set up a page header to print today's date on the top left and the page number on the top right of each page. To do this choose **Headers/Footers** from the File menu. This command opens a dialog that allows you designate headers on the top left, center and right and a bottom centered footer.

_ Title Text	
Top Left	
Top Center	
Top Right	
Bottom Cente	r 🚬
Page#	mm/dd/yy Month dd, YYYY hh:mm:ss
🗹 Same as	s Data Sheet, or: pt
	Cancel OK

Start with the top left header. Type in the words **Printed** on and then press the **Month dd**, **YYYY** button.

	type Printed on
Title Text	
Top Left	Printed on «date:Month ddnth, yyyy»
Top Center	
Top Right	
Bottom Center	
nage#	mm/dd/yy Month dd, YYYY hh:mm:ss
then p	press button

Now for the top right header. Type Page and then press the Page# button.

type Page	
Title Text	
Top Left	Printed on «date:Month ddnth, yyyy»
Top Center	
Top Right	Page «Page#»
Bottom Center	
Page#	mm/dd/yy Month dd, YYYY hh:mm:ss
th	en press button

Once both headers are set up press the **OK** button. (To learn more about the header and footer options available when printing the data sheet see "<u>Printing Data Sheet Headers & Footers</u>" on page 1026. When printing a form you have complete control over the exact layout of headers and footers — see "<u>Custom Reports</u>" on page 1039.)

Next, choose the **Page Setup** command from the File menu. (Before you do this, make sure that the printer you want to use is connected to your computer and selected.) The exact options available in the **Page Setup** dialog depend on the operating system and what kind of printer you are using, but in general you can control the page size, orientation (tall or wide), and print reduction factor. Here is a typical **Page Setup** dialog.

Page Setup	
Settings: Page Attributes	•
Format for: Any Printer	•
Paper Size: US Letter 8.50 in x 11.00 in	•
	•
Scale: 100 %	
? Car	icel OK

Page 49

Select the printing options you want to use and press the **OK** button. To actually print the data sheet choose **Print** from the File menu. The printing dialog will appear. The exact options available in this dialog depend on the operating system and what kind of printer you are using, but in general you can control which pages to print, how many copies to print, and whether you want to manually feed the paper. Here is a typical **Print** dialog.

Print	
Printer: LaserWriter 12/640 PS	
Copies & Pages	
Copies: 1 🗹 Collated	
Pages: 💽 All	
○ From: 1 to: 1	
<ul> <li>Fax</li> <li>Cancel</li> </ul>	Print

For the exact details on the operation of this dialog see the documentation that came with your printer. Press the **Print** button to print the data sheet. Panorama will automatically print as many sheets as necessary.

First	Last	Address	City	Stat	Zip	Phone	
Donald	Leach	16376 E Evans Rt	Fairbanks	AK	99707	(907) 442-7203	
Henry	Burger	25063 S.W Leith Ave	Conway	AR	72032	(501) 216-1936	
Derrick	Bryan	526 W Mohawk Court	Fayetteville	AR	72703	(501) 937-3922	
Michelle	Hutchinson	939 S Bonner Drive	Little Rock	AR	72223	(501) 899-8962	
Norman	Brazelton	2958 S. Portage Blvd	Chandler	AZ	85244	(602) 680-0751	
Renée	Lindsay	248 S.E. Utica Trail	Flagstaff	AZ	86002	(602) 991-5127	
Herbert	Matthews	14244 N Valencia Rt	Higley	AZ	85236	(602) 635-3865	
Richard	Comminges	838 E. Hill Ct	Peoria	AZ	85381	(602) 698-0222	
Betty	Curry	120 S. Hall Street	Phoenix	AZ	85015	(602) 741-0954	
Phillip	Wong	3765 S.E. 16Th Street	Riviera	AZ	86442	(602) 699-9355	
Sharon	Blair	28071 S.W Cordova Bl	Acton	CA	93510	(805) 901-9201	
Harry	Kowalski	33153 N Waverly Blvd	Arcata	CA	95518	(707) 218-8647	
Harry	Gonzalez	937 E. Frederick Ln	Arcata	CA	95519	(707) 897-5532	
Evelyn	Lawlen	579 S.W Sequoia Cir	Berkeley	CA	94701	(415) 670-5367	
Cheryl	Scholl	440 N.W. Baker PI	Beverly Hills	CA	90211	(310) 828-9677	
Leonard	Phelps	746 East Tremont Trai	California City	CA	93505	(805) 985-4299	
Kathleen	Bills	7930 E. Brown St	Colusa	CA	95932	(916) 582-2423	

If you want to print only a portion of the database, use the **Select** button in the **Find/Select** dialog to select the data you want before printing the database (see "<u>Selecting Instead Of Finding</u>" on page 26). Only the visible records will be printed.

# **Creating a Form for Printing Mailing Labels**

Now let's create a mailing label. Many types of peel-off labels are available commercially. Panorama already knows the dimensions of many popular labels and can do most of the work for you. The first step in setting up a mailing label is to create a **form** to hold the label. A form is like a sheet of paper that you can draw on (see "<u>Introduction to Forms</u>" on page 459). You can place graphics, text and data on the form to create labels, invoices, statements, or virtually anything else. To create a new form select **New Form** from the View menu.

File Edit	View	Fields	Text	Search So	rt	Math	Setup	Wizards
000	Data	Sheet		ling List				
🖻 First	Desi	gn Sheet		City	State	Zip	Phone	<b>A</b>
😒 Lorraine	Flas	h Art Scra	pbook	Wauwatosa	WI	53213	(414) 310-9	
Kristin Paul		Form	•	Chas Clearmont	WV WY	25304 82835	(304) 823-2 (307) 729-8	
John	New	Crosstab	<b>.</b>	Huntington Bea	CA	92649-:	(714) 846-1	378
La Pat	FURDARO	Procedu		Palm Desert	CA	92211-	(760) 345-4	1890

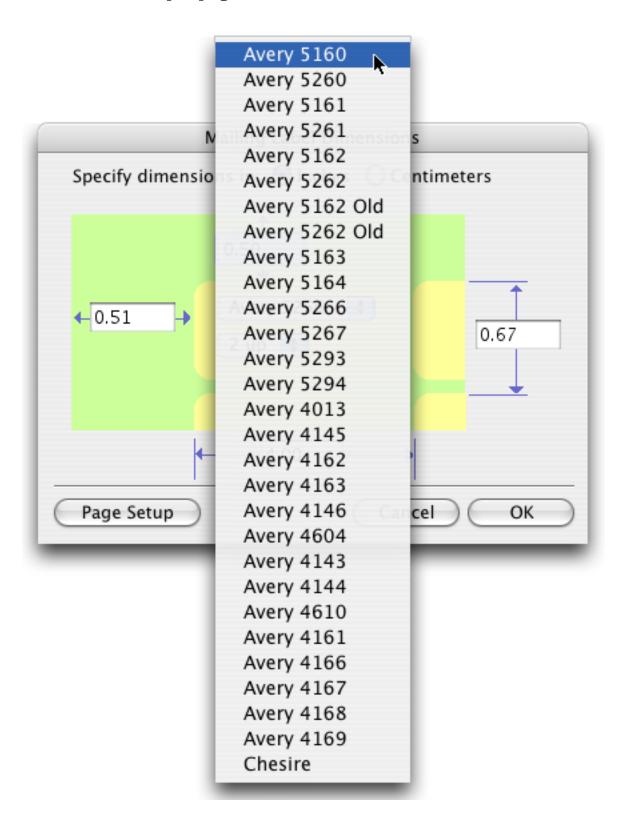
A dialog box appears asking for more information about the new form you want to create. Type in a name for the new form (we used the name Mailing Labels, but you can choose any name up to 25 characters long).

te New Form
📃 Insert before:
÷
Quick Label Quick Report

The dialog gives you three options when creating a new form — a blank form, a mailing label and a report. Press the **Quick Label** button. The Quick Label dialog appears, allowing you to define the dimensions of the mailing label you want to print on.

Mailing Label Dimensi	ons
Specify dimensions in: 💿 Inches 🔘	Centimeters
0.50 • 0.51 • 0.51 • 0.51 • 0.51 • 0.56 • 2 up •	0.67
4.00	→
Page Setup C	ancel OK

In the center of the dialog is a pop-up menu that lists many popular labels. The most popular label is the Avery 5160 which contains 30 labels per page in three columns of 10 labels.



When you release the mouse the updated label dimensions appear. (You may also see an alert telling you that the largest possible printable page area must be set in the **Page Setup** dialog. If you see this message you should make sure Page Setup is configured to use as much of the page as possible, with the minimum possible margins.)

Mailing Label Dimensions
Specify dimensions in: 💿 Inches 🔘 Centimeters
0.50 • 0.18 • 0.18 • 0.18 • 0.18 • 0.18 • 0.18 • 0.18 • 0.10 •
2.75
Page Setup Cancel OK

Press the **OK** button after the dimensions are set up.

Once the label dimensions are set up, the next step is to set up the text that will be printed on the label. A second dialog box will appear with a list of fields on the left. You'll build the template for your label on the right.

Mailing	Label Layout
Double click to copy field to labe	
First Last Address City State Zip Phone	
Font: Geneva 🗘 Size	: 1 Cancel OK

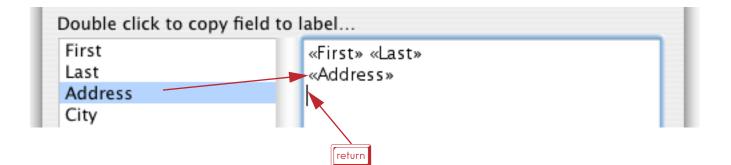
Start by double clicking on the First field, then press the Space Bar.

I	Double click to copy field to label
I	First
l	Last
l	Address
	space

Now double click on the Last field, then press the **Return** key.

Double click	to copy field to label	
First	«First»«Last»	
Last -		
Address		

Double click on the Address field, then press the **Return** key.



Double click on the City field, then press the **comma** key and the **Space Bar**.

First	«First» «Last»	
Last	«Address»	
Address	City»,	
City		
State		

Finish the label by double clicking on the State field, pressing the **Space Bar** and then double clicking on the Zip field.

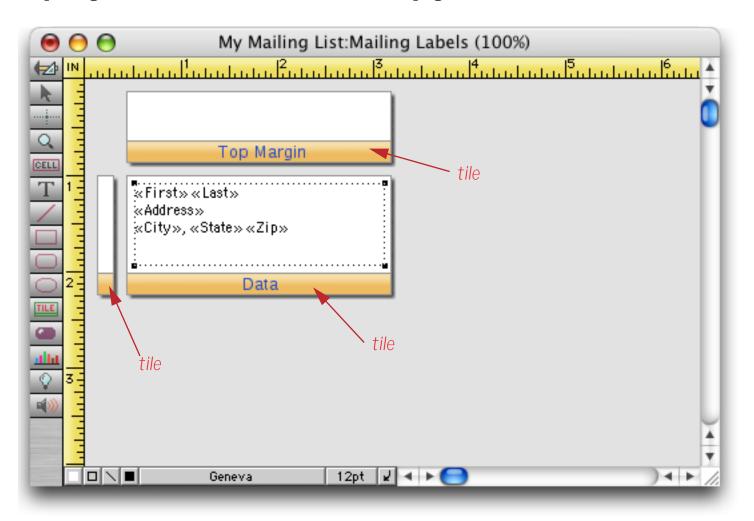
Double click to copy field to	abel	
First Last Address City State Zip Phone	«First» «Last» space «Address» «City», «State» «Zip»	

You can choose the font and size you want to use now or later.

Last Address City State Zip Phone	«Addı «City:	ress» », «State» «	Zip»		
	4	9 point 10		-	
Font: Geneva 🛟	Size:	√ 12			ок
	_	14			
		18			
		24			
		36			
		48			
		Up	Ж[		
		Down	₩]		
		Other			

Press **OK** when the label design is complete.

Panorama now shows you the finished template for the label. The label appears on special "tiles" that control the size and spacing of the labels (see "<u>Tiles In Action</u>" on page 1054).



#### **Previewing the Labels**

To see how the page of labels would look before printing, choose **Preview** from the File Menu. If this is the first time the labels have been previewed or printed, the **Page Setup** dialog will appear. If this happens, just press **OK** to skip to the preview window. The **Print Preview** window will show a reduced view of an entire page of labels.

			Print Preview
	na Reizean Reizean Reizean		
1977) 1979 2970) 1974 2980) 1974		NA BARA Maria ar Martin Maria, Charach	
		artas o qual artas das presion qu 16 artigo a di Sul	
		NE BANKAL 2047 M BING CI U PER (2 41 M)	
		10,700 1077404 1002237 1964 100. 10.00237 1964 100.	
Station of the second sec		PERSONAL AND A COMPANY Teacher Party Person Party, California	
		and the second s	
	1992 - 1992 - 1993 1992 - 1993 - 1993 1	Jan Polyana Part Carly ( an Part ( a Young)	
	Jan Cula Na Pint Partinor III one cular, cucco	i mai faithf Child Li, Childh Parlay Paillet, Children	
4+0			) •

You can click on the magnifying glass tool to see the report life-size, and click on the Next Page tool to preview the next page.

) 🖯	Print Preview	
Donald Leach	Phillip Wong	Deborah Wolf
16376 E Evans Rt	3765 S.E. 16Th Street	8503 E. Glenbrook Ave.
Fairbanks, AK 99707	Riviera, AZ 86442	Eureka, CA 95503
Henry Burger	Sharon Blair	Linda Bischoff
25063 S.W Leith Ave	28071 S.W Cordova Blvd	955 N. Harbor Cir.
Conway, AR 72032	Acton, CA 93510	Fresno, CA 93747
Derrick Bryan	Harry Kowalski	Darlene Simpson
526 W Mohawk Court	33153 N Waverly Blvd.	37054 South Greene Apt
Fayetteville, AR 72703	Arcata, CA 95518	Industry, CA 91746

When you are done looking at the preview, click on the window's close box. To learn more about the Print Preview window see "Print Preview" on page 1034.

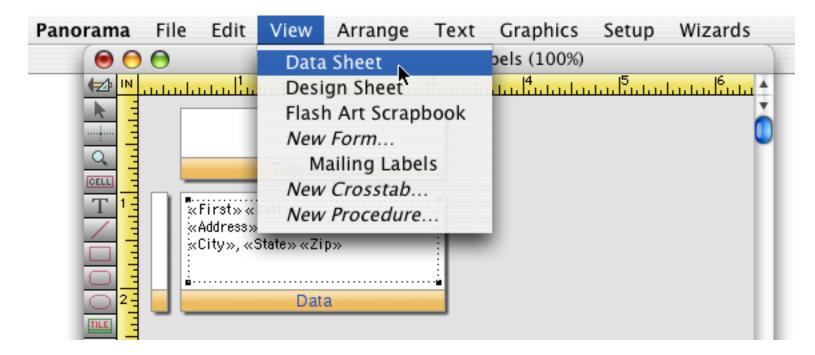
#### **Printing the Labels**

To print your mailing labels, first make sure that the correct printer is selected. Make sure the labels are set up in the printer, then choose **Print** from the File Menu.

If you don't want to print all of the labels, use the **Find/Select** command to select the addresses you do want to print. Use the **Select** button so that only the addresses you want to print are visible (see "<u>Selecting Instead</u> <u>Of Finding</u>" on page 26). Once the correct addresses are selected, use the **Print** command to print the labels. After the labels are printed, use the **Select All** command (see "<u>Selecting All Records</u>" on page 35) to make all of the addresses visible again.

#### Switching Between Forms and the Data Sheet

To switch back to the data sheet select **Data Sheet** from the View menu.



Panorama will switch the window from the mailing label back to the data sheet.

0	0	My Mailing List							
•	First	Last	Address	City	State	Zip	Phone	A	
	Lorraine Kristin Paul John Pat	Ponce McLean Steinberg Kuttel Furnare	897 W. Cotati Circle 39096 S.W Cameron Pk 29653 S.W Taubman Bl 16893 Algonquin St 40210 Baltusrol Cir	Wauwatosa Chas	WI WV WY	53213 25304 82835 92649-:	(414) 310-9096 (304) 823-2415 (307) 729-8985 (714) 846-1376 (760) 345-4890	5	
	203 visi	ble/203 total			_		).	▼ ◆ ▶ //.	

The View Menu lists every possible view of your database, and also allows you to create new views. To switch back to the mailing label, choose the name of the form containing the label from the menu.

Panorama	File	Edit	View	Fields	Text	Searc	h	Sort	Mat	h	Setup	Wi
Panorama Panorama First Corra Krist Paul John Pat	ine F	Edit .ast Ponce McLean Steinberg Kuttel Furnare	Data Desig Flash New M	Sheet gn Sheet h Art Scra <i>Form</i> ailing Lab <i>Crosstab</i>	pbook els <sub>k</sub>	Searc a I Bea rt	State VI VV VV	Zip 53213 25304	Phone (414) (304) (307) (714)	310- 823- 729- 846-	9096 2415 8985 1378	Wi:
<u> </u>			New	Procedui	е	1						1

Your database can contain many different forms, each displaying the data a different way (see "<u>Introduction</u> <u>to Forms</u>" on page 459).

# Creating a Data Entry Form

A form is not limited to displaying and printing data, it can also be set up for data entry. Using a form allows you to lay out the fields any way you like. You are not limited to the row and column format used by the data sheet.

To create a new form view you'll use the **View** menu. You're going to create the form in a new window. To do this you must hold down the **Alt** key if you are using a Windows PC, if you are using a Macintosh hold down the **Control** key. Either way, select **New Form** from the View menu.

Panoram	a File	Edit	View	Fields	Text	Sear	ch	Sort	Math	Setup	Wi
0	0	_	Data	Sheet		st					
•	First	Last	Desi	gn Sheet			State	Zip	Phone		<b>A</b>
2.2	Lorraine	Ponce	Flas	h Art Scra	pbook	i sa	WI	53213	(414) 310		×.
×	Kristin Paul	McLean Steinberg		Form	N		WV WY	25304 82835	(304) 823 (307) 729		
33	John	Kuttel	M	ailing Lat	oels	lon Bea	ĊA	92649-:	(714) 846	5-1378	
<u> </u>	Pat	Furnare		Crosstak		rt	CA	92211-	(760) 345	5-4890	
			New	Procedu	re						
<u> </u>			_		_						
and the second											

Panorama will ask you for the name of the new form. You can use any name you like up to 25 characters, we chose the name Entry.

Create New Form					
New Form Name:	📃 Insert before:				
Entry	Mailing Labels				
Cancel Blank Form Quick Label Quick Report					

When you press the **Blank Form** button Panorama will create a new, empty, form. Since you pressed the **Alt** key (PC) or the **Control** key (Mac) when using the **View** menu, Panorama creates the form in a new window, leaving the data sheet also open in the back (see "<u>Opening More Than One Window Per Database</u>" on page 189).

000	My Mai	ling List	
🚺 \varTheta 🖯 🕤		List:Entry (100%)	
	սիստությունը	1 <sup>3</sup>	<sup>5</sup>
<b>3</b> <sup>4</sup> k =			-
4 T 1-			
alla			
			U
			Ă
	C		*
	Geneva 12	2pt 🖌 🖣 🕨 🥌	

The tool palette on the left side of the window contains tools for creating and manipulating graphic objects on the form. The most commonly used tools are shown below.

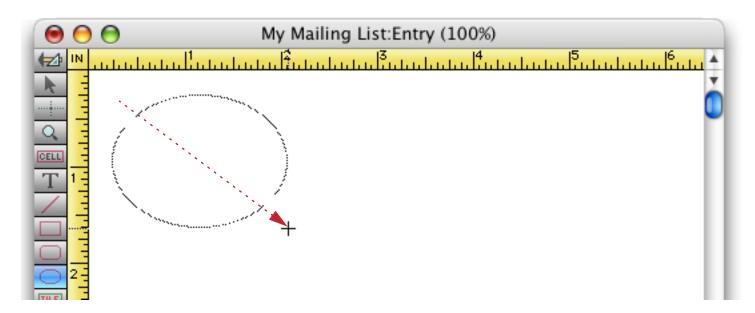
🛃 ——— switch between graphics editing and data editing
<b>I</b> — pointer for selecting graphic objects
turn cross hair on/off (to help alignment)
A magnify/reduce
<b>EELL</b> ——————————————————————————————————
T create text object
<pre>// create line object</pre>
————————————————————————————————————
————————————————————————————————————
—— create oval/circle object

## **Creating Graphic Objects**

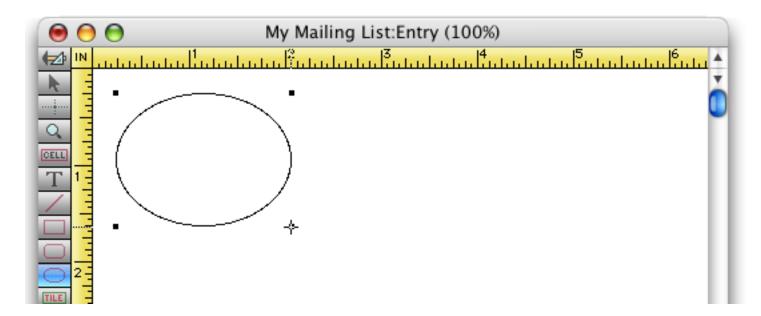
Before you actually start creating the data entry form let's practice a bit with using these tools. Start by selecting the **Oval** tool.

000	My Mailing List:Entry (100%)
	1 
<u>a</u>	
<b>Oval</b>	

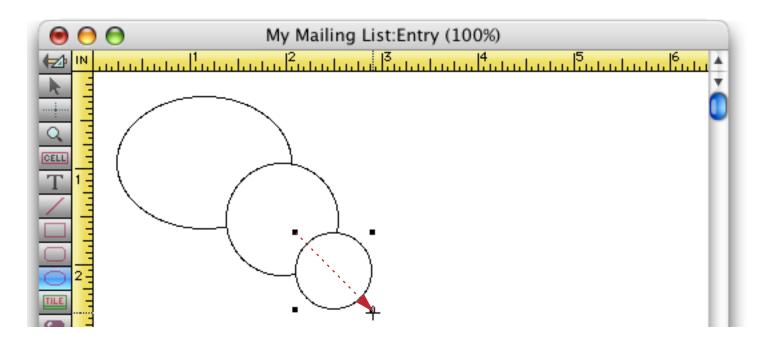
Now move the cursor onto the form and drag the mouse across the surface of the form to define the location and size of the new object (the dragging motion is shown by the dashed arrow in the illustration below). A gray outline of the new object will follow the mouse.



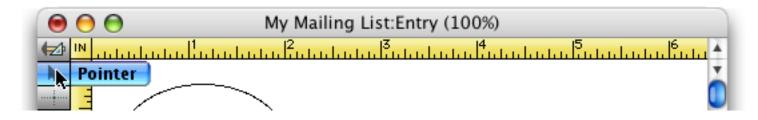
When you release the mouse, the new object will appear.



Each time you drag across the form you will create a new shape. Create several shapes as shown below (these objects are just for experimentation, so don't worry about the exact position and size).



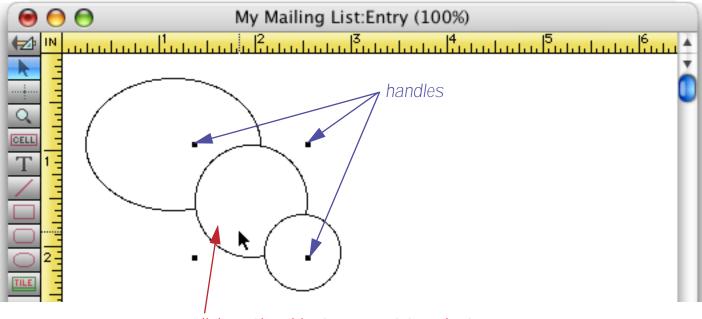
When you are finished creating shapes, click on the Pointer tool.



**Don't forget to click on the Pointer tool when you are done!** If you don't, the next time you click you will create another graphic object. To learn more about creating graphic objects see "<u>Creating a Graphic Object</u>" on page 472.

#### Selecting and Moving a Graphic Object

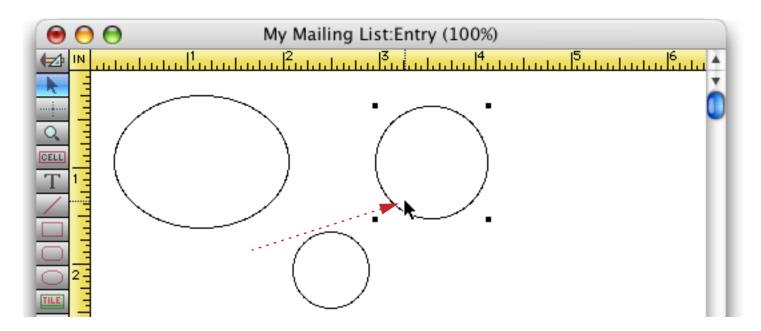
To select a graphic object simply click on it with the **Pointer** tool selected. Four "**handles**" appear at the corners to show that the object is selected (see "<u>Selecting a Single Object</u>" on page 479).



click on the object you want to select

Page 61

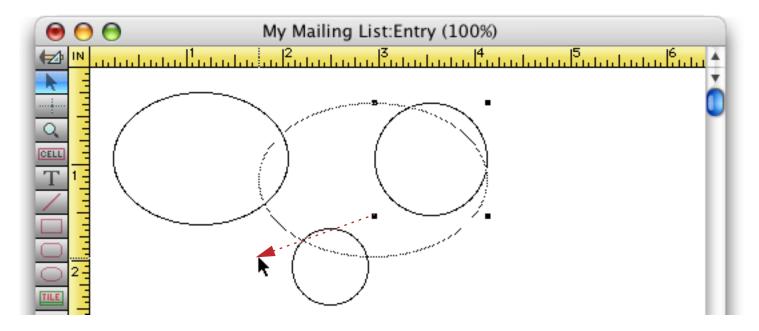
To move an object click on it and drag to the new position (see "Moving a Single Object" on page 486).



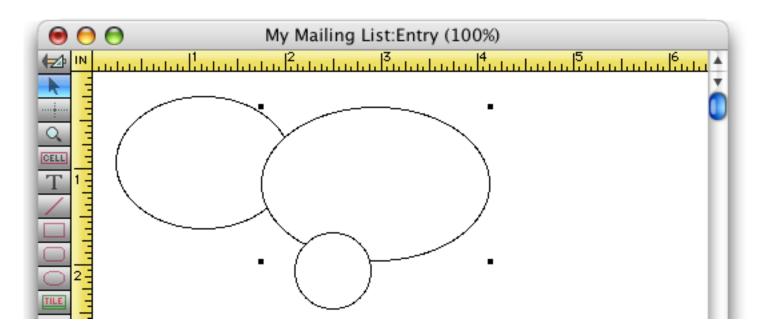
For fine adjustments you can use the arrow keys ( $\bigcirc$ ,  $\bigcirc$ ,  $\bigcirc$ ,  $(\bigcirc$ ,  $\bigcirc$ ), to nudge selected objects into position. Each time you press an arrow key, the object (or objects) moves one pixel in the direction of the arrow (see "<u>Nudging an Object (or Objects)</u>" on page 487).

# Adjusting the Size of a Graphic Object

To change the size of an object, first select the object with the **Pointer** tool. Then use the mouse to drag one of the corner handles. As you drag the handle, an outline of the object will follow the mouse.



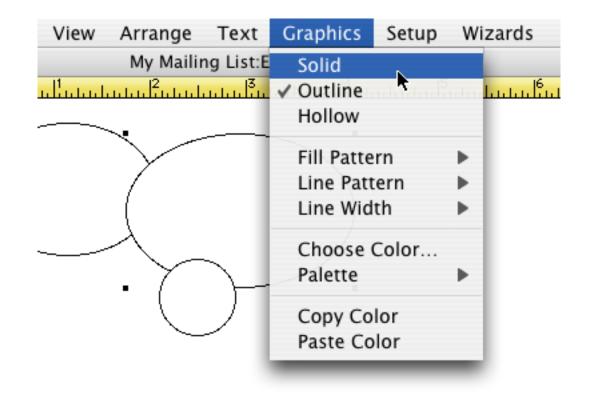
Release the mouse when the corner is in the correct spot (see "<u>Changing the Size of a Single Object</u>" on page 491).



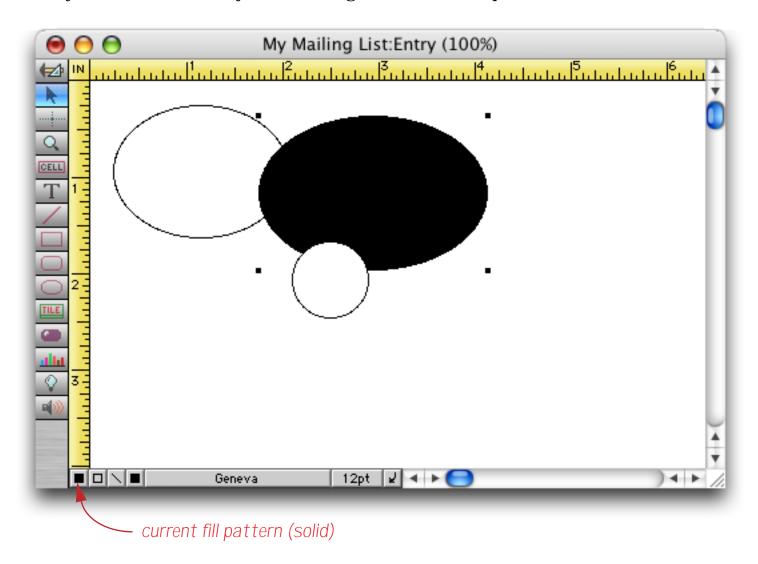
The arrow keys ( $\bigcirc$ ,  $\bigcirc$ ,  $\bigcirc$ ,  $(\bigcirc$ ,  $\bigcirc$ ) usually nudge the entire object. However, after you click or drag a handle, the arrow keys will nudge just that handle. Each time you press an arrow key the handle will move one pixel in the direction of the arrow. In other words, each time you press an arrow key the object will grow (or shrink) one pixel in the direction of the arrow (see "Nudging the Size of an Object" on page 491). You can also adjust the position and size of the object numerically with a dialog, see "<u>Viewing and Setting Exact Object</u> <u>Dimensions</u>" on page 490 to learn how.

#### **Changing an Objects Appearance**

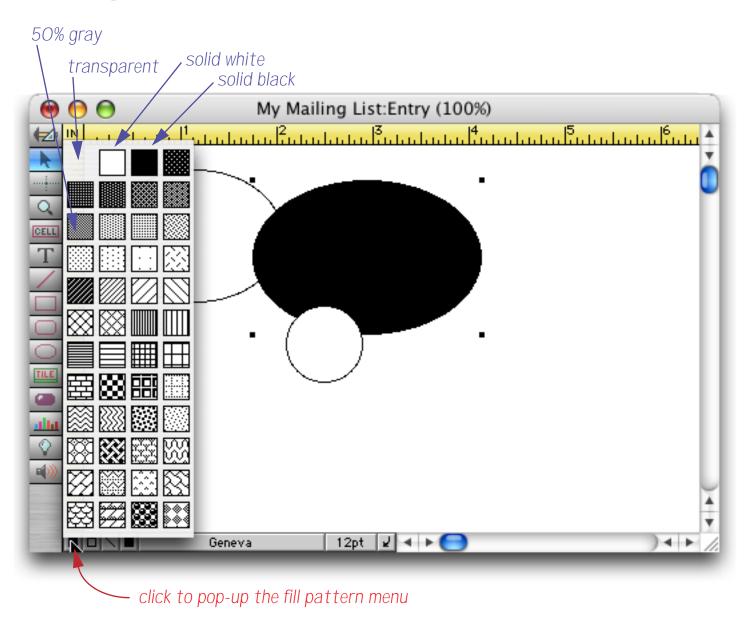
The new objects you have created are white with a black border. You can change it to Solid (or Hollow) with the Graphics menu (see "Solid, Outline and Hollow Objects" on page 498).

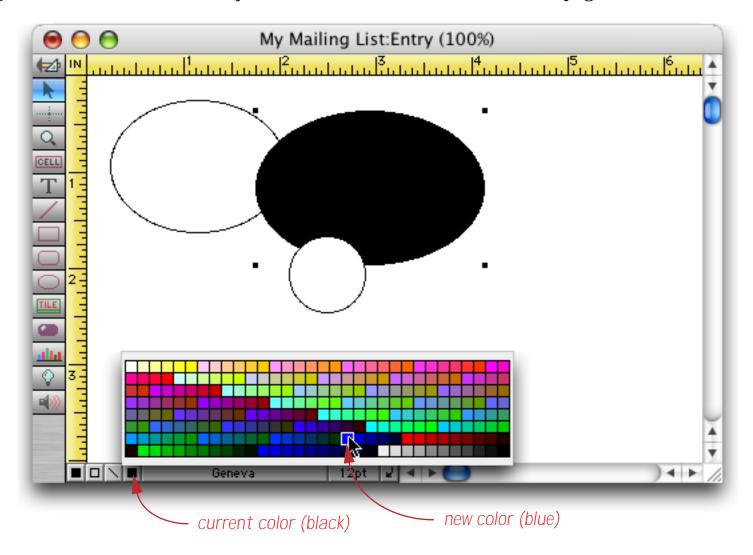


After you make your selection the object will change to the selected pattern, in this case solid fill.



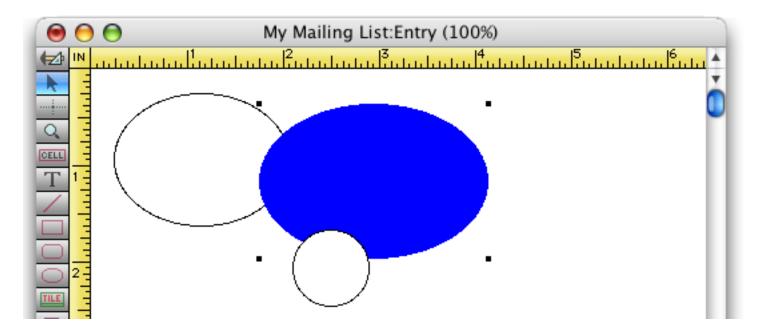
You can also use the **Graphic Control Strip** (on the bottom of the window next to the horizontal scroll bar, see "<u>The Graphic Control Strip</u>" on page 483) to change the appearance of the selected objects. Another way to change the selected object to solid black is to use the fill pattern menu (see "<u>Fill Pattern</u>" on page 499). This menu has 40 different patterns to choose from.



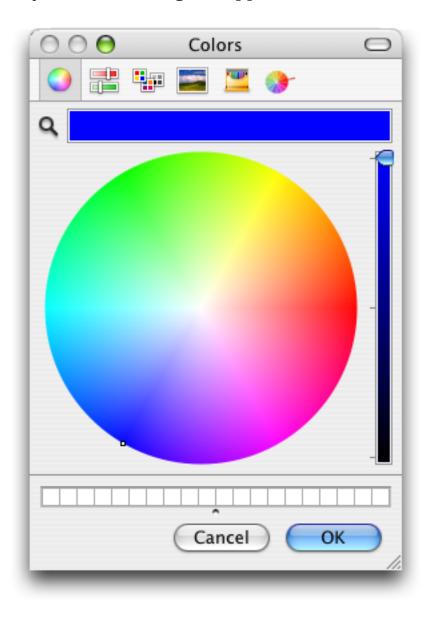


To change the color of the selected object use the color menu (see "<u>Color</u>" on page 504).

After you make your selection the object will change to the selected color.



If you want to choose a color that is not on the palette hold down the **Control** key while clicking on the color swatch in the control strip (On PC systems you should Right-Click on the swatch instead of holding down the Control key). The standard system color dialog will appear.

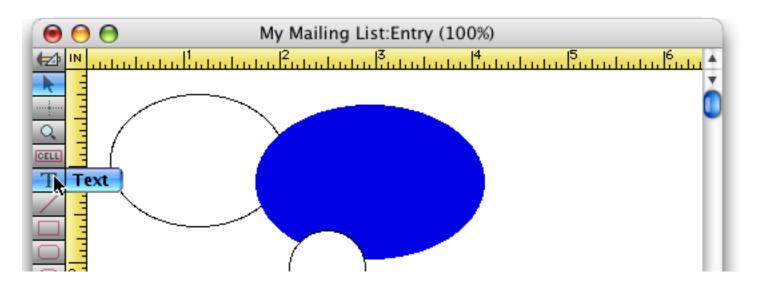


Choose the color you want and press OK.

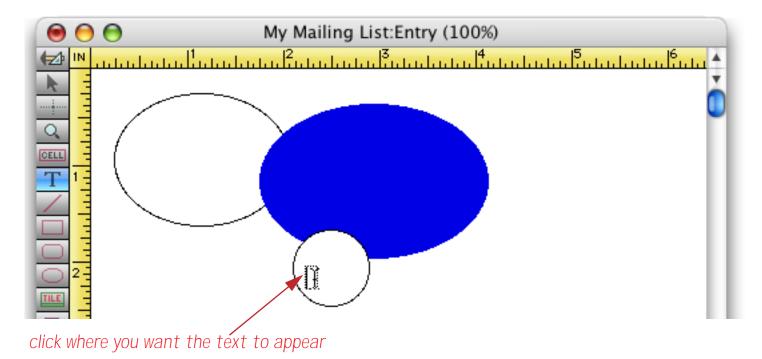
You can also adjust the line pattern (see "<u>Line Pattern</u>" on page 501) and the line width (see "<u>Line Width</u>" on page 503) of the selected object(s), and you can copy the color from one object to another (see "<u>Copying and Pasting Colors</u>" on page 506).

# **Creating Text Objects**

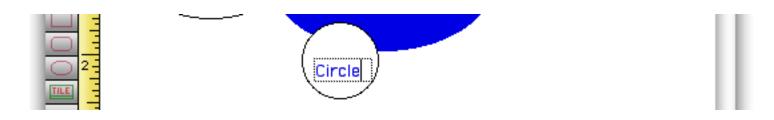
To add a piece of text to your form start by clicking on the **Text** tool.



Now move the mouse to the position where you want the text to appear (you can adjust the position later) and click the mouse.

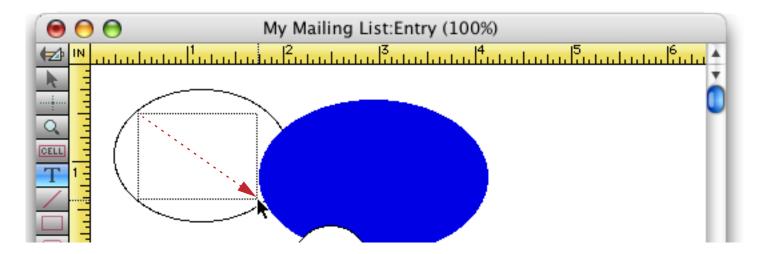


Now use the keyboard to type in the text.



As you type each character, the click text object automatically expands. To add another line of text press the **Return** key. When you're done creating text you can click on another spot to create another text object or you can click on the **Pointer** tool.

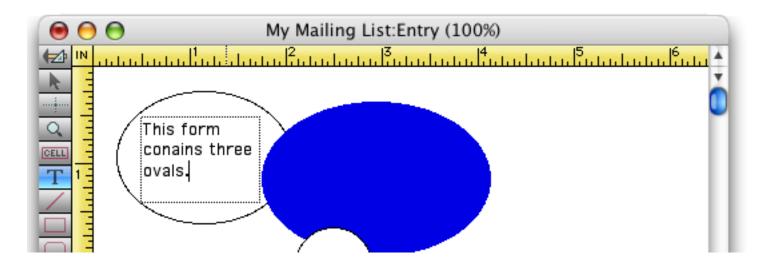
The text object you just created is called **click text**, because you click to create it. Panorama has another type of text object called an **auto-wrap text** object. Instead of expanding automatically as you type an auto-wrap text object is a fixed size, with the text wrapping inside the object. To create an auto-wrap text object click on one corner of where you want the object to appear and then drag to the opposite corner.



My Mailing List:Entry (100%)

When you release the mouse a dotted box appears for you to type into.

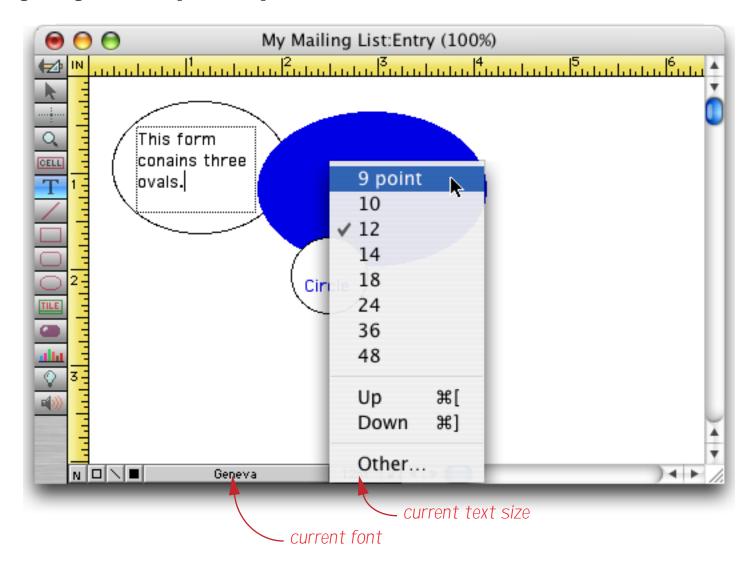
Whatever you type will wrap inside of the box.



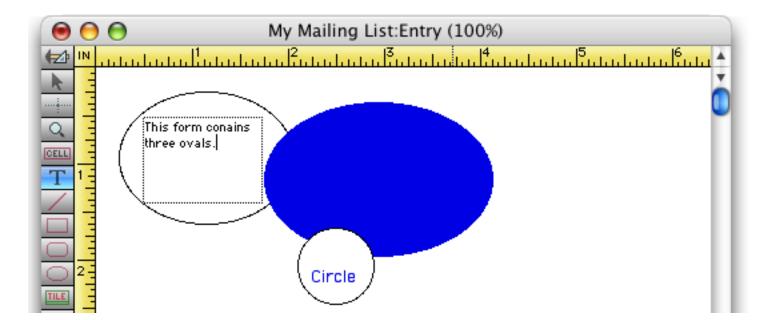
When you're done creating text you can click or click-drag on another spot to create another text object or you can click on the **Pointer** tool.

## Changing the Font and Size

To change the font and size of the selected object you can use the **Graphic Control Strip** or you can use the **Text** menu (see "<u>Text Font, Size and Style</u>" on page 571). The illustration below shows the auto-wrap text object being changed from 12 point to 9 point.



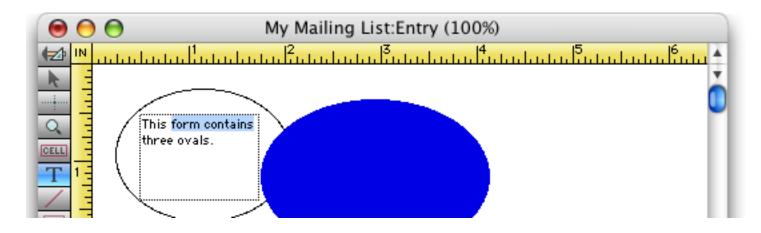
Here's the revised text object.



Within a single text object all of the text must be the same font, size, style and color. If you want to mix different text appearance within a single object you must use Panorama's Word Processor SuperObject (see "<u>Word Processor SuperObject</u>" on page 651).

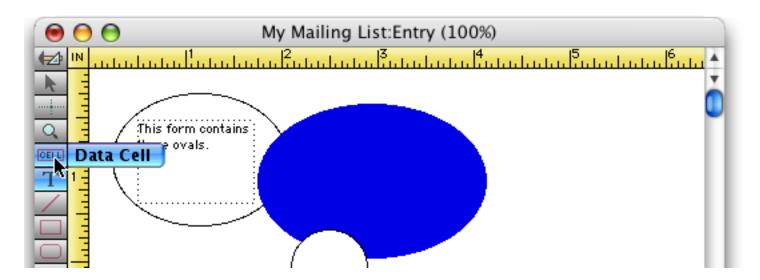
#### **Editing a Text Object**

To edit a text object simply select the **Text** tool and click or drag on the object (see "<u>Editing Fixed Text</u>" on page 568). With this tool you can edit the text object just like any other text - click to select an insertion point, double click to select a word, etc.

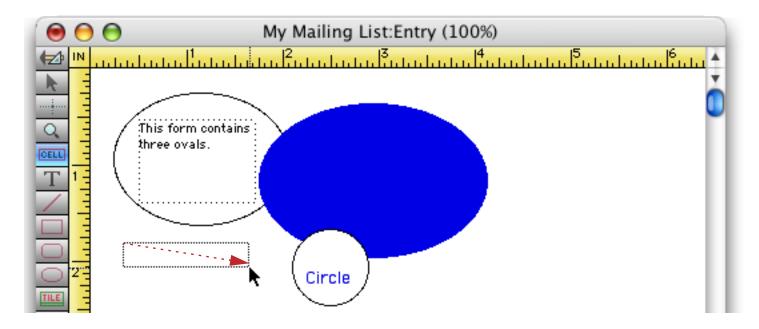


### **Creating Data Cell Objects**

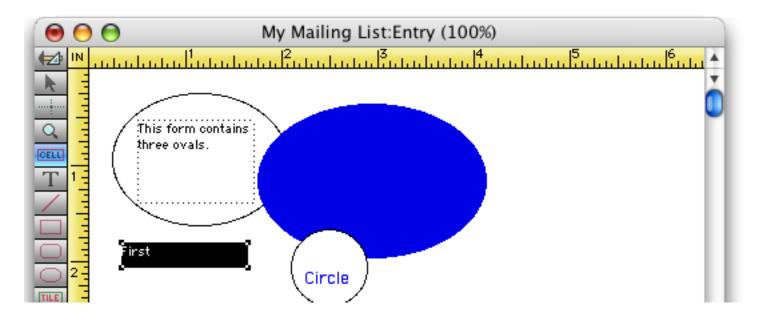
Panorama has two different types of objects for editing data (see "<u>Types of Data Editing Objects</u>" on page 610). Right now you're going to learn about data cells, which allow data fields to be edited with a popup input box very similar to the data sheet (see "<u>Entering Data Into Your New Database</u>" on page 7 and "<u>The Input Box</u>" on page 276). To create a data cell start by selecting the **Data Cell** tool (see "<u>Working with Data Cell Objects</u>" on page 613).



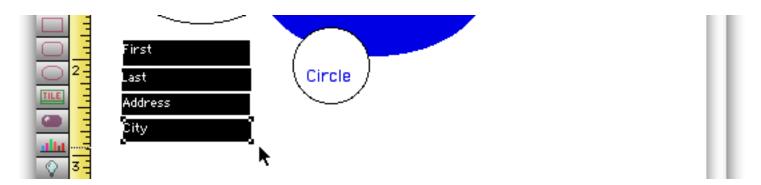
Drag the mouse across the form in the spot where you want to create the data cell.



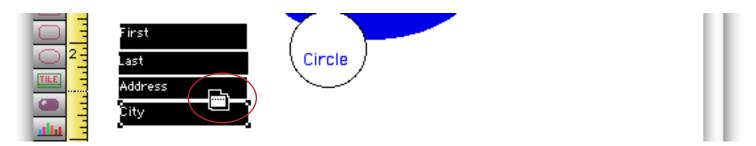
When you release the mouse the data cell is created. It is automatically assigned to the first field in the database, which in this database is First.



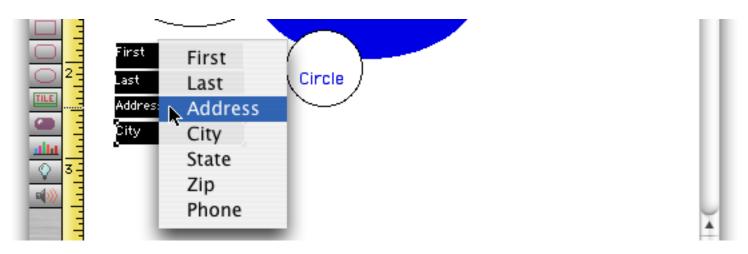
Each additional data cell you create will be assigned to the next available field in the database.



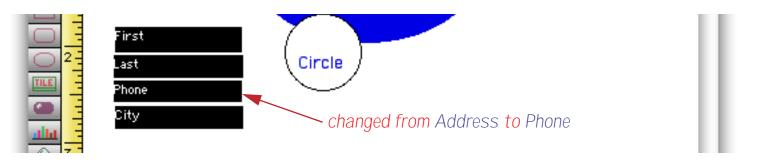
To change the field a data cell is assigned to make sure the **Data Cell** tool is selected and move the mouse over the data cell object. When the mouse is over the object the arrow turns into a little menu icon.



When you see this icon you can press the mouse button to see a pop-up menu of the fields in the database.



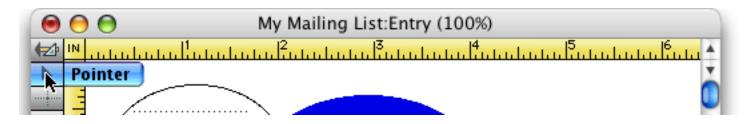
Select the field you want assigned to the data cell from the pop-up menu.



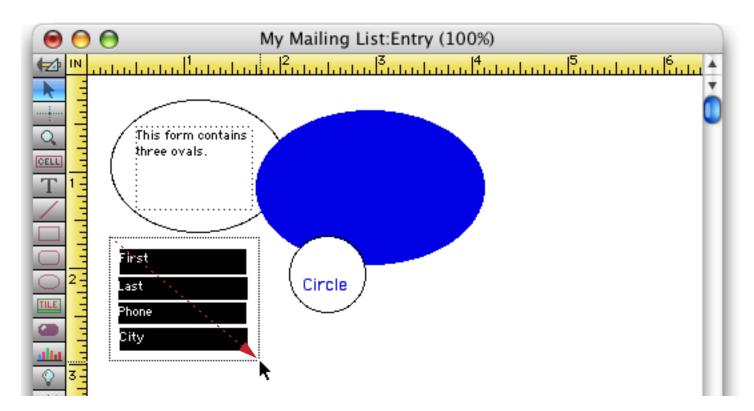
Panorama has another type of graphic object for editing data - the Text Editor SuperObject. To learn more about this type of object see "<u>Text Editor SuperObject</u>" on page 617.

# **Aligning Multiple Objects**

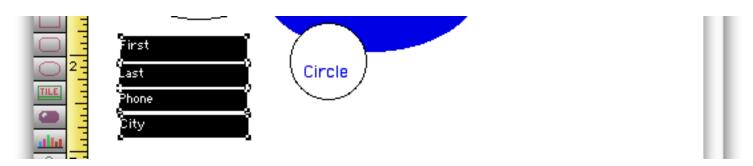
I don't know about you, but those raggedy looking data cells are really bothering me! Fortunately Panorama has tools that can make this objects nice and neat in a hurry. Start by selecting the **Pointer** tool.



Now start on an empty spot on the form and drag the mouse diagonally across all four objects. The dotted rectangle should surround the objects.



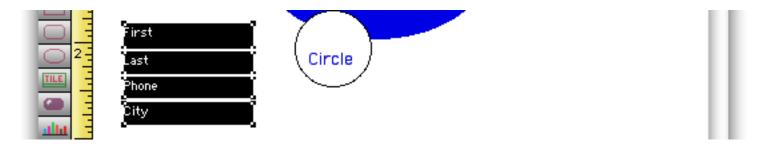
When you release the mouse all four objects will be selected (see "<u>Selecting Multiple Objects at Once</u>" on page 480).



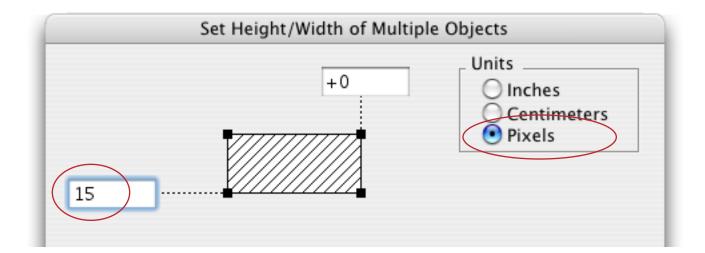
To align the left and right edges of the objects choose **Align Objects** from the Arrange menu (see "<u>Aligning</u> <u>Objects</u>" on page 531). The dialog gives you eight different alignment choices — pick Left & Right.

	Ali	gn Objects	
🔘 Тор	OBottom	OT/B Centers	🔘 Top & Bottom
🔘 Left	O Right	OL/R Centers	💽 Left & Right
			•

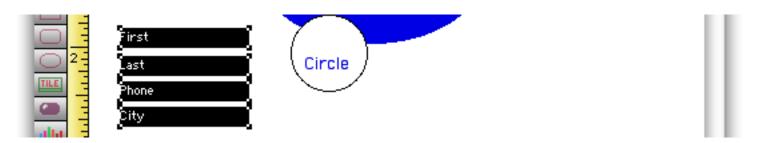
When you press the Align button the left and right edges of the objects are brought into perfect alignment.



To set the height of all of the objects to 15 pixels choose **Dimensions** from the Edit menu (see "<u>Setting Exact</u> <u>Dimensions of Multiple Objects</u>" on page 528). Select the Pixels radio button and type in 15 for the height (just 15, not +15).



When you press **OK** all of the objects will be adjusted to 15 pixels.



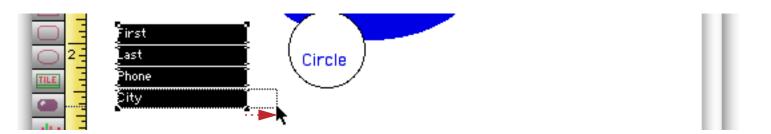
To vertically space the objects evenly choose the **Spacing** command from the Arrange menu (see "<u>Adjusting</u> <u>Spacing Between Multiple Objects</u>" on page 534). Click on the <u>Vertical</u> option and set the spacing you want between each object (a pixel is one screen dot, or 1/72nd of an inch).

Adjust Object Spacing
_ Direction
💿 Vertical 🛛 🔘 Horizontal
_ Space Between Objects
1 pixels
Cancel OK

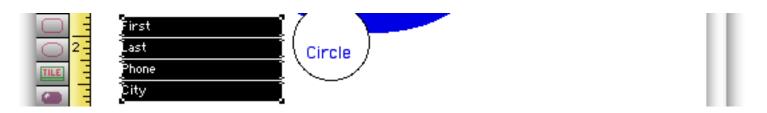
The data cells are now lined up nice and neat.



Before we call it a day let's make one final adjustment. Hold down the **Shift** key and drag the bottom right handle of the bottom object to the right.



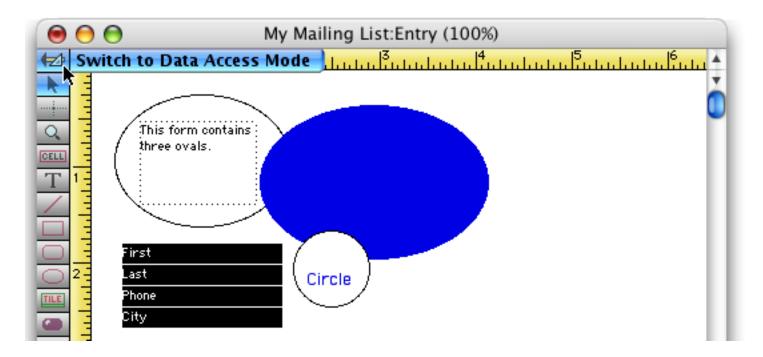
When you release the mouse all four objects will expand. This feature is called **cluster resize** (see "<u>Cluster</u> <u>Resize</u>" on page 519 for additional examples) and is very handy for adjusting columns of objects.



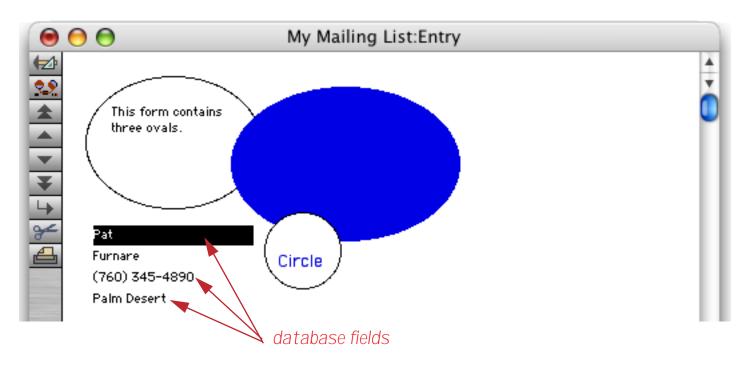
In a few minutes you'll learn a method to create data cell objects in a nice neat column or row in the first place, making the technique shown above unnecessary. However, you'll still find the techniques described above useful in many circumstances.

#### Using Data Cells to Edit Data

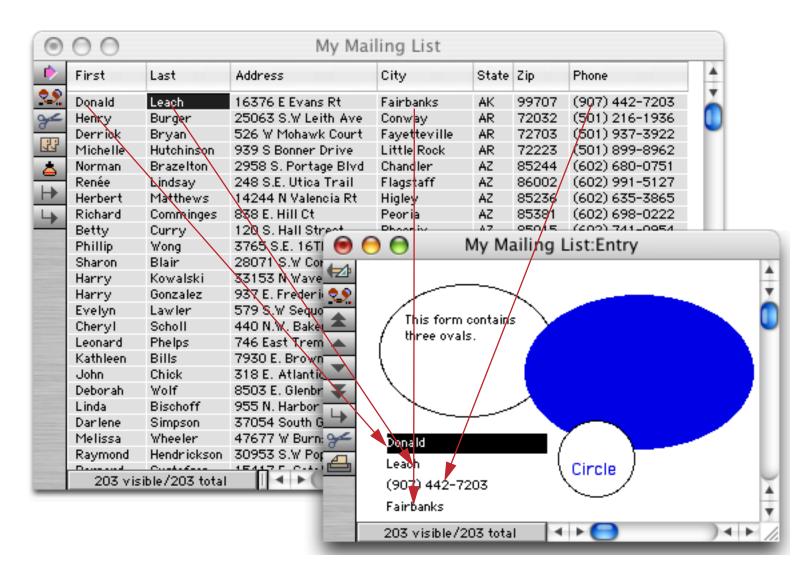
So far you've managed to make four boxes with field names on them — perhaps that doesn't seem very useful. To activate these cells you must switch the form from **Graphic Design Mode** to **Data Access Mode**.



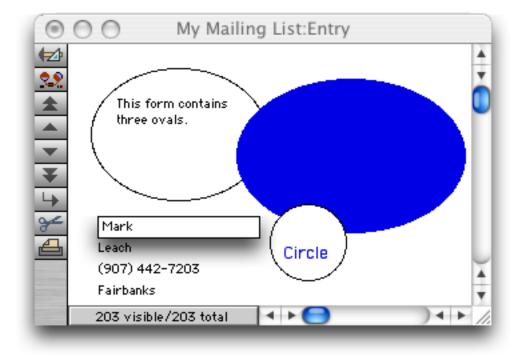
In this mode the rulers disappear and the tool palette switches from graphics tools to data navigation tools (see "<u>Moving From Record to Record</u>" on page 269 and "<u>Browsing the Database With a Form</u>" on page 466). Most importantly, the data cells now display information from the database itself.



If you adjust the windows so that you can see both the data sheet and the form you can see that the form is displaying the same information that the data sheet is displaying.



If you double click on one of the data cells you can edit the data, just as you could in the data sheet (see "<u>Entering Data Into Your New Database</u>" on page 7 and "<u>The Input Box</u>" on page 276).



Page 77

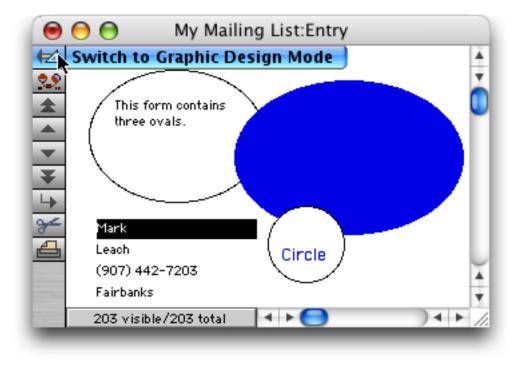
When you press the **Enter** key the new data will appear in both the form and the data sheet.

First	Last	Address	City	State	Zip	Phone	
Mark	Leach	16376 E Evans Rt	Fairbanks	AK	99707	(907) 442-7203	
Henry	Burger	25063 S.W Leith Ave	Conway	AR	72032	(501) 216-1936	
Derrick	Bryan	526 W Mohawk Court	Fayetteville	AR	72703	(501) 937-3922	
Michelle	Hutchinson	939 S Bonner Drive	Little Rock	AR	72223	(501) 899-8962	
Norman	Brazelton	2958 S. Portage Blvd	l Chandler	AZ	85244	(602) 680-0751	
Renée	Lindsay	248 S.E. Utica Trail	Flagstaff	AZ	86002	(602) 991-5127	
Herbert	Matthews	14244 N Valencia Rt	Higley	AZ	85236	(602) 635-3865	
Richard	Comminges	838 E. Hill Ct	Peoria	AZ	85381	(602) 698-0222	
Betty	Curry	120 S. Hall Street	Phoonix	47	05015	(402) 741-0054	
Phillip	Wong	3765 S.E. 16TI 🔘 I	0	My Ma	ailing I	List:Entry	
Sharon	Blain	28071 S.W Cor		-	-		
Harry	Kowalski	331,53 N Wave					
Harry	Gonzalez	077 N. England 📥 🕥					
nanny	001124162	937 E. Frederii 👥		~~	<hr/>		
	Lawler	579 S.W Seque	This fame		$\mathbf{N}$		
Evelyn		579 S.W Seque 440 N.W. Baker	This form		5		
Evelyn Cheryl Leonard	Lawler	579 S.W Seque 440 N.W. Baker 746 East Trem	This form three oval		5		
Evelyn Cheryl Leonard	Lawler Scholl	579 S.W Seque 440 N.W. Baker 746 East Trem A 7930 E. Brown	1		5		
Evelyn Cheryl Leonard Kathleen	Lawler Scholl Phelps	579 S.W Seque 440 N.W. Baker 746 East Trem	1		,		
Evelyn Cheryl Leonard Kathleen John Deborah	Lawler Scholl Phelps Bills Chick Wolf	579 S.W Seque 440 N.W. Bake 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr	1		-		
Evelyn Cheryl Leonard Kathleen John Deborah	Lawler Scholl Phelps Bills Chick	579 S.W Seque 440 N.W. Bake 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor	1		5		
Evelyn Cheryl	Lawler Scholl Phelps Bills Chick Wolf	579 S.W Seque 440 N.W. Bake 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr	1		s		
Evelyn Cheryl Leonard Kathleen John Deborah Linda	Lawler Scholl Phelps Bills Chick Wolf Bischoff	579 S.W Seque 440 N.W. Baker 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor 37054 South G 47677 W Burn:	three oval		5		
Evelyn Cheryl Leonard Kathleen John Deborah Linda Darlene	Lawler Scholl Phelps Bills Chick Wolf Bischoff Simpson Wheeler Hendrickson	579 S.W Seque 440 N.W. Baker 746 East Trem ▲ 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor 37054 South G 47677 W Burn: ↔ 30953 S.W Por	three oval		5		
Evelyn Cheryl Leonard Kathleen John Deborah Linda Darlene Melissa Raymond	Lawler Scholl Phelps Bills Chick Wolf Bischoff Simpson Wheeler Hendrickson	579 S.W Seque 440 N.W. Baker 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor 37054 South G 47677 W Burn:	Mark Leach	s.	5	Circle	
Evelyn Cheryl Leonard Kathleen John Deborah Linda Darlene Melissa Raymond	Lawler Scholl Phelps Bills Chick Wolf Bischoff Simpson Wheeler Hendrickson	579 S.W Seque 440 N.W. Baker 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor 37054 South G 47677 W Burn:	three oval	s.	5	Circle	
Evelyn Cheryl Leonard Kathleen John Deborah Linda Darlene Melissa Raymond	Lawler Scholl Phelps Bills Chick Wolf Bischoff Simpson Wheeler Hendrickson	579 S.W Seque 440 N.W. Baker 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor 37054 South G 47677 W Burn:	Mark Leach	s.		Circle	
Evelyn Cheryl Leonard Kathleen John Deborah Linda Darlene Melissa Raymond	Lawler Scholl Phelps Bills Chick Wolf Bischoff Simpson Wheeler Hendrickson	579 S.W Seque 440 N.W. Baker 746 East Trem 7930 E. Brown 318 E. Atlantic 8503 E. Glenbr 955 N. Harbor 37054 South G 47677 W Burn:	Mark Leach (907) 442-7:	s.  203		Circle	

The same process works in reverse also — any data you enter into the data sheet will also appear in any forms that are open.

# **Building the Data Entry Form**

Enough practice — it's time to start building the actual data entry form. Start by switching the form back to **Graphic Design Mode**.



We're going to start over in this form, so the first step is to erase all of the practice objects you have created. To do that choose **Select All Objects** from the Edit menu, then **Clear** from the Edit menu (or press the **Delete** key). Now you've got an empty form.

\varTheta \varTheta My Mailing List:Entry (100%)	
	սիսիս 🔺
	<u> </u>
	- 11
TI	- 11
	- 11
	- 11
	Ă
TILE	Ψ.
	) ◀ ▶ //.

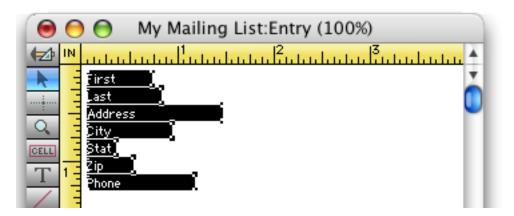
Now click the mouse in the upper left hand corner of the form, about 1/16th of an inch from the top and left hand sides.



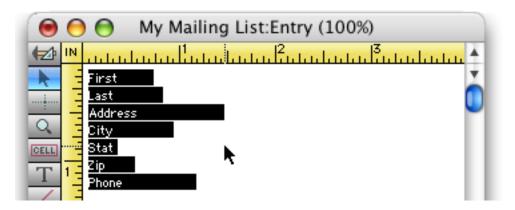
Now choose the **Auto Cell Layout** command from the Arrange menu. This command is going to create a neat column of data cells for us (see "<u>Automatically Creating Rows or Columns of Data Cells or Text Editor Super-Objects</u>" on page 640). This dialog controls how the data cells are generated. Start by pressing the **Select All Fields** button. Then set the **Spacing** (Pixels) option to 1.

Automa	tic Cell Layout
Select All Fields Line Items	Layout: 📃 Across 📃 Same Width
First Last	1 Object Height (Lines)
Address City State	1 Spacing (Pixels) Extras: Field Names Boxes
Zip Phone	SuperObject: □ Create SuperObjects™
	Borders: Top Left Bottom Right Shadow 3D
	Formatting: 🗹 Wrap at end of line Non-White Background
	Term when: ☑ Return ☑ Tab □ Up/Down Arrows
	Cancel OK

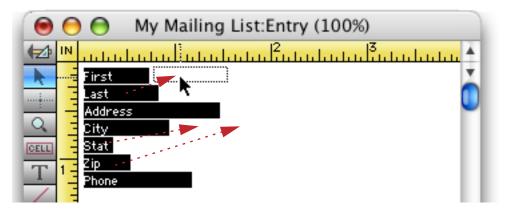
When you press the **OK** button Panorama will automatically create a column of data cells (starting at the point where you clicked the mouse).



All of the objects are selected. To begin working on the objects separately click on any blank spot to de-select the objects.



Using a combination of dragging and the arrow keys ( $\boxdot$ ,  $\boxdot$ ,  $\checkmark$ ,  $(\checkmark$ ,  $\frown$ ),  $(\checkmark$ ,  $(\frown)$ ,  $(\frown)$ ,  $(\frown)$ ) move the objects so that the First and Last name objects are on the same line and the City, State and Zip objects are the same line. Usually the best technique is to drag the object approximately into place and then use the arrow keys to nudge it exactly into position. If you need to review the techniques for dragging and nudging objects see "<u>Moving a Single Object</u>" on page 486 and "<u>Nudging an Object (or Objects</u>)" on page 487. You may also find "<u>Viewing and Setting Exact Object Dimensions</u>" on page 490 useful.



When you nudge an object with the arrow keys ( $\leftarrow$ ,  $\rightarrow$ ,  $\lor$ ,  $\uparrow$ ) blue lines will appear when the object is aligned with other objects. When you are finished the result should look like this.

0	🖻 😁 🛛 My Mailing List:Entry (100%)
	•
k	First Last 🔀
	Address
۹.	City Stat Lip
CELL	- *-
T 1	Phone
1	

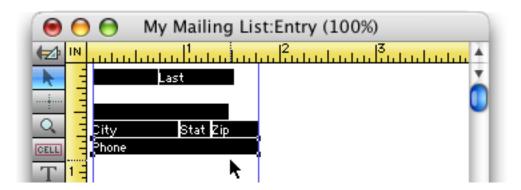
Next drag and nudge the Phone object up under the City, State and Zip objects. When you drag the Phone object hold down the **Shift** key so that Panorama will drag the object straight up with no slip to the left or right (see "<u>Moving a Single Object</u>" on page 486). Then use the  $\square$  and  $\square$  arrow keys to nudge it into final position.

0	) 😑 🛛 My Mailing List:Entry (100%)
🔁 IN	
<b>N</b>	First Last
	Address
9	City Stat Zip
CELL ·····	
T 1	Phone

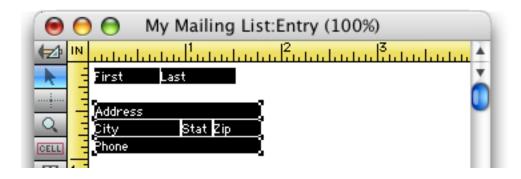
Again holding down the **Shift** key, drag the lower right hand handle to the right, expanding the width of the Phone object.

\varTheta \varTheta My Mailing List:Entry (100%)	
	ունունը 🔺
First Last	*
Address	
City Stat Zip	
CELL	
T	

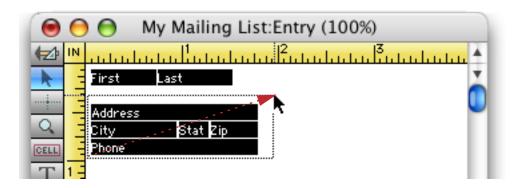
Then use the  $\leftarrow$  and  $\supset$  arrow keys to nudge the width of the object until it matches the combined width of the City, State and Zip objects. The blue alignment lines appear when the objects are aligned. You may also find it useful to use the crosshair cursor to check the alignment (see "<u>Nudging to the Crosshair Cursor</u>" on page 493).



Then use the same techniques to adjust the width of the Address cell. Alternatively you can select the Address and Phone objects (see "<u>Selecting Multiple Objects at Once</u>" on page 480) and then use the **Align** command with the Left & Right option to adjust the width. Either way the form should now look like this.



Drag the mouse around the bottom group of objects to select them (see "<u>Selecting Multiple Objects at Once</u>" on page 480).



While holding down the **Shift** key drag these objects up underneath the First and Last objects. After you've dragged them close use the  $\downarrow$  and  $\uparrow$  arrow keys to nudge the objects into final position.

0	🖯 😁 My Mailing List:Entry (100%)
<b>₩</b>	<u> </u>
*	Last
····•	Address
Q	Phone
CELL	-

Finally drag and nudge the width of the Last name object to match the other objects.

0	) 😑 My Mailing List:Entry (100%)	
🔁 IN		4
	First Last Address City Stat Zip Phone	Ŏ

As one last enhancement you'll set the background color of the form. To do this use the **Form Preferences** command in the Setup menu. The background color is set with a pop-up menu at the bottom of this dialog (see "<u>Form Background Colors</u>" on page 560).

Options:	E Fractional Font Widths								
	Use Data Style/Color								
	🗹 Enable up/down arrows								
	FileGlobal Variables								
	Allow Clones								
	Use Server for lookup								
	📃 72 dpi Printing								
Ruler Units:	Inches 🛟								
Nudge Distance:	1 pixel								
Bkgnd Color:		-				4		T	
		╋	⊢	H		╉	╋	╋	H
					N				
					-5				

Your new form is now complete. Use the **Switch To Data Access Mode** tool to prepare for displaying and entering data, and adjust the window size and position so that both the data sheet and form are visible at the same time.

First	Last	Address	City	State	Zip	Phone	-
Mark	Leach	16376 E Evans Rt	Fairbanks	AK	99707	(907) 442-7203	-
Henry	Burger	25063 S.W Leith Ave	Conway	AR	72032	(501) 216-1936	
Derrick	Bryan	526 W Mohawk Court	Fayetteville	AR	72703	(501) 937-3922	
Michelle	Hutchinson	939 S Bonner Drive	Little Rock	AR	72223	(501) 899-8962	
Norman	Brazelton	2958 S. Portage Blvd	Chandler	AZ	85244	(602) 680-0751	
Renée	Lindsay	248 S.E. Utica Trail	Flagstaff	AZ	86002	(602) 991-5127	
Herbert	Matthews	14244 N Valencia Rt	Higley	AZ	85236	(602) 635-3865	
Richard	Comminges	838 E. Hill Ct	Peoria	AZ	85381	(602) 698-0222	
Betty	Curry	120 S. Hall Street	Phoenix	AZ	85015	(602) 741-0954	
Phillip	Wong	3765 S.E. 16Th Street	Riviera	AZ	86442	(602) 699-9355	
Sharon	Blain	28071 S.W Cordova Bh	Acton	CA	93510	(805) 901-9201	
Harry	Kowalski	33153 N Wavenly Blvd	Arcata	CA	9551	🖲 🔵 My Ma	iling I
Harry	Gonzalez	937 E. Frederick Ln	Arcata	CA	9551		inng L
Evelyn	Lawler	579 S.W Seguoia Cir	Berkeley	CA	9470 😓	Mark Leach	
Cheryl	Scholl	440 N.W. Baker PI	Beverly Hills	CA	9021 👝		
Leonard	Phelps	746 East Tremont Trai	California City	CA	9350	Fairbanks AK	
Kathleen	Bills	7930 E. Brown St	Colusa	CA	9593 🚖	(907) 442-7203	2210
John	Chick	318 E. Atlantic Cir	Corona Del Mar	CA	9262	(907) 442-7205	
Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	9550		) 4
Linda	Bischoff	955 N. Harbor Cir.	Fresno	CA	93747	(209) 452-1355	100
Darlene	Simpson	37054 South Greene Ap	Industry	CA	91746	(818) 247-5475	
Melissa	Wheeler	47677 W Burnside Dr	La Mesa	CA	91942	(619) 464-9001	
Raymond	Hendrickson	30953 S.W Poplar Blvd	Los Angeles	CA	90035	(213) 724-2175	

The form window has a tool palette and scroll bars that aren't really necessary. To get rid of them select the **Window Tweak** command from the Form Tools submenu of the Wizard menu (see "<u>Turning Window Components On and Off (Window Tweak Wizard)</u>" on page 170). The tool palette and scroll bars are now removed.

First	Last	Address	City	State	Zip	Phone	*
Mark	Leach	16376 E Evans Rt	Fairbanks	AK	99707	(907) 442-7203	1
Henry	Burger	25063 S.W Leith Ave	Conway	AR	72032	(501) 216-1936	
Derrick	Bryan	526 W Mohawk Court	Fayetteville	AR	72703	(501) 937-3922	-
Michelle	Hutchinson	939 S Bonner Drive	Little Rock	AR	72223	(501) 899-8962	
Norman	Brazelton	2958 S. Portage Blvd	Chandler	AZ	85244	(602) 680-0751	
Renée	Lindsay	248 S.E. Utica Trail	Flagstaff	AZ	86002	(602) 991-5127	
Herbert	Matthews	14244 N Valencia Rt	Higley	AZ	85236	(602) 635-3865	
Richard	Comminges	838 E. Hill Ct	Peoria	AZ	85381	(602) 698-0222	
Betty	Curry	120 S. Hall Street	Phoenix	AZ	85015	(602) 741-0954	
Phillip	Wong	3765 S.E. 16Th Street	Riviera	AZ	86442	(602) 699-9355	
Sharon	Blair	28071 S.W Cordova Bh	Acton	CA	93510	(805) 901-9201	
Harry	Kowalski	33153 N Wavenly Blvd	Arcata	CA	95518	🗏 🔴 🔴 🔘 My M	lai
Harry	Gonzalez	937 E. Frederick Ln	Arcata	CA	95519		- cari
Evelyn	Lawler	579 S.W Sequoia Cir	Berkeley	CA	94701	i Mark Leach	
Cheryl	Scholl	440 N.W. Baker PI	Beverly Hills	CA	90211	1 16376 E Evans Rt	
Leonard	Phelps	746 East Tremont Trai		CA	93505	Fairbanks AK 9	997
Kathleen	Bills	7930 E. Brown St	Colusa	CA	95932	(907) 442-7203	
John	Chick	318 E. Atlantic Cir	Corona Del Mar	CA	92625		
Deborah	Wolf	8503 E. Glenbrook Ave	Eureka	CA	95503	(707) 448-9673	
Linda	Bischoff	955 N. Harbor Cir.	Fresno	CA	93747	(209) 452-1355	
Darlene	Simpson	37054 South Greene Ap	Industry	CA	91746	(818) 247-5475	
Melissa	Wheeler	47677 W Burnside Dr	La Mesa	CA	91942	(619) 464-9001	
Raymond	Hendrickson	30953 S.W Poplar Blvd	Los Angeles	CA	90035	(213) 724-2175	

If you ever need to get the scroll bars and tool palette back again (for example to modify the form) simply select the **Window Tweak** command again. Another option is to close the form window and then re-open it with the **View** menu, which will also restore the tools and scroll bars.

Now that the form is complete be sure to **Save** your work. (In fact it really would have been a good idea to save two or three times while you were working on the form. Since Panorama saves so quickly there's no reason not to save early and often.) Panorama saves the window positions along with the data and graphics (assuming you checked the **Save Window Positions** option when you originally saved the file, see "<u>Saving</u> <u>Window Positions</u>" on page 86), so if you close the file and then re-open it the form window and data sheet windows will reappear in the same places, ready to go.

The new form you have created only scratches the surface of the capabilities available for building forms. To see a more sophisticated example use the **Favorite Databases** wizard to open the 106th Congress database. This form uses what is called **view-as-list** mode, which allows a form to display more than one record at a time (kind of a cross between the data sheet and a regular form. See "<u>View-As-List Forms</u>" on page 877 to learn how to create this type of form.



To see an example of a more traditional form press the **Contact Info** or **Bio** button. (See "<u>Push Buttons</u>" on page 801 to learn how to create a button.) Pressing either button opens a form in a new window.

0	00	106th	n Congres	s:List			
<b>₽</b>	Search	Contact Info	Bio Data Sh	eet by Name	by State		
		Member	Ms. Loretta	Sanchez			
<b>??</b> ≁	Sec.	Democrat	California 4	6th District			
≁		Phone/Fax	(202) 225-:	2965 (202) 2	225-5859		
55		Member	Mr. Christo	oher Cox			
۵.	25	Republican	California 4	7th District			
<u>₽</u>		Phone/Fax	(202)		104	th Congres	s:Piography
4		Member	Mr. Ro	00	100		ss:Biography
	29	Republican	Califor 🖅		1.00	Member 🤜	
-		Phone/Fax	(202) 왔	Alexandre .		Democrat 🤝	
-	0	Member	Mr. Br 🚖	A HOURS		Leadershi	
	175	Republican	Califor 🔺	and the		First Electe	
		Phone/Fax	(202) 👻			Committee:	s Armed Services Education and the Workforce
		Member	Mr. Bo 🛫		M. A.		
-	R	Democrat	Califor L		20 80		
	NY.	Phone/Fax	(202)		101		
	0	Member	Mr. Ra		1		
	1251	Republican	Califor	Birthday/B	irthplace	01/07/1960	44 yrs Lynwood, CA
		Phone/Fax	(202)	1	Education	BS Chapman Un	iversity, 1982; MBA American
	5	Member	Mr. Du		Military		
	125	Republican	Califor		Spouse	Stephen Brixey	Religion Catholic
	1	Phone/Fax	(202)	Prev	vious Job	Investment Ban	ker Hometown Santa Ana
	538 v	isible/538 to	tal	Previou	s Offices	no prior electeo	d office
			Contract of the local division of the local				

All of these forms use **Flash Art** to display a photograph (see "<u>Flash Art</u>™" on page 728). You can also show and play a QuickTime movie in a form (see "<u>Displaying Movies in a Form</u>" on page 797).

# Writing a Letter to Someone in the Mailing List

Panorama includes a pre-built database for handling general word processing chores — the **Mini Correspondence** wizard (see "<u>Using the Mini Correspondence Wizard</u>" on page 705). This database may be used for general correspondence (letters, memos, etc.) and to create mail merge letters that are customized and sent to a group of recipients. To write a letter to a person in your mailing list database, first locate and click on that person.

0 0	My Mailing List						
First	Last	Address	City	State	Zip	Phone	
2 Richard	Comminges	838 E. Hill Ct	Peoria	AZ	85381	(602) 698-0222	
🚄 Betty	Curry	120 S. Hall Street	Phoenix	AZ	85015	(602) 741-0954	
Phillip	Wong	3765 S.E. 16Th Street	Riviera	AZ	86442	(602) 699-9355	
<ul> <li>Betty</li> <li>Phillip</li> <li>Sharon</li> </ul>	Blain	28071 S.W Cordova Bh	Acton	CA	93510	(805) 901-9201	
Harry	Kowalski	33153 N Waverly Blvd	Arcata	CA	95518	(707) 218-8647	
Harry	Gonzalez	937 E. Frederick Ln	Arcata	CA	95519	(707) 897-5532	

click on the person you want to write a letter to

Now open the Mini Correspondence wizard.

Wizards		🏺 🗊 D 🚺
Calculations	•	
Developer Tools	•	
Documentation	•	
Form Tools	•	
Guided Tour	•	
Internet	۰.	
Mini Applications	•	Mini Calendar
Preferences	•	Mini Contacts
Utilities	•	Mini Correspondence
		Mini Statistics
Live Clairvoyance		Stopwatch
Database Information		Task Timer
Favorite Databases		
New Database Wizard		

The wizard will ask you if you want to create a new letter to Sharon Blair.

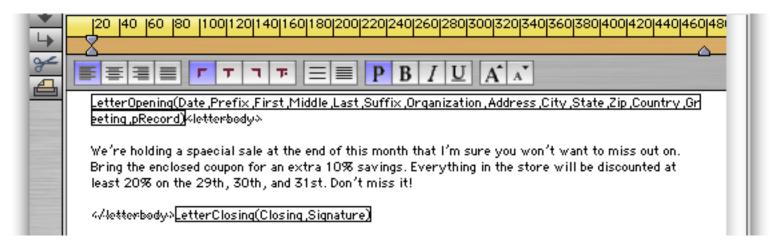
<u></u>	Do you want to create a new letter to "Sharon Blair"?
_	No Yes

Press the Yes button to create the new letter. The wizard will automatically fill in the name and address in the new letter.

0	0		Mini	Correspon	dence:Letter				
Þ	Name	Ms. Sharon Blair			Date	09/25/04	Saturday		
29	-	David Architects	Bervic	es	Greeting	Dear			
*	Address	28071 S.W Cordo	va Blv	d	Closing	Sincerely			
					Signature				
-	City/St/Zip Country	Acton	CA	93510		President			
¥		190, 11,0011,0011,40	11.001	0010001000104	012601200120	01740176017	004001400140140140		
4									
<b>⊁</b> ₫									
	LetterOpening(Date ,Prefix ,First ,Middle ,Last ,Suffix ,Organization ,Address ,City ,State ,Zip ,Country ,Gr eeting ,pRecord)								
	<insert body="" here="" letter="" of=""></insert>								
-									

Page 86

At this point all you need to do is type in the body of the letter. Just start typing.



When you are finished typing in the letter press the **Enter** key. Panorama will display a preview of the actual letter, including the address, greeting and salutation.

0	Mini Correspondence:Letter								
Þ	Name Ms. Sharon Blair	Date 09/25/04 Saturday							
29	Organization David Architects Services	Greeting Dear							
*	Address 28071 S.W Cordova Blvd	Closing Sincerely							
		Signature James Rea President							
-	City/St/Zip Acton CA 93510	Fresident							
		40105010001200124012501200140014001401450140							
4		40 260 280 300 320 340 360 380 400 420 440 460 48							
¥									
<b>≁</b> ₫		$\mathbf{B} \mid I \mid \mathbf{U} \mid \mathbf{A}^* \mid \mathbf{A}^*$							
	September 25th, 2004								
	Ms. Sharon Blair								
-	David Architects Services								
	28071 S.W Cordova Blvd Acton, CA 93510								
	Dear Ms. Blair,								
-	We're holding a spaecial sale at the end of this mon								
	Bring the enclosed coupon for an extra 10% saving: least 20% on the 29th, 30th, and 31st. Don't miss								
	Sincerely,								
-									
	James Rea								
	President								

If you want to print this letter use the **Print This Letter**... command in the Letter menu.

File	Edit	Letter	Template	Setup	Wizards						
		New Blank Letter (Sans Serif 9 pt)									
		New I	New letter to "Sharon Blair" (My Mailing List)								
		Open Correspondence List Window									
		Save									
		Page	Setup								
		Print	This Letter		k						
		Print	203 Mail Me	rge Lette	ers (My Mailing List)						

To learn more about editing a word processing document (including setting margins, tabs, fonts, styles and colors) see "<u>Using the Word Processor</u>" on page 655.

# Printing a Mail Merge Letter

You can take the same letter you just created and send it to multiple recipients — for example we could send it to everyone in the **619** area code. Start by going back to the **My Mailing List** database and selecting the members of congress from California (see "<u>The Find/Select Dialog</u>" on page 335).

Find/Select Data							
Cancel	Find %F Select %S Select Within %L Select Additional %M						
Phone	<ul> <li>Contains</li> <li>(619)</li> </ul>						
and First	÷						

As you can see there are 4 people in this area code in the mailing list.

00		My Mai					
First	Last	Address	City	State	Zip	Phone	4
🙎 Melissa	Wheeler	47677 W Burnside Dr	La Mesa	CA	91942	(619) 464-9001	
Alan	Harrison	93 Morton Ter	San Diego	CA	92123	(619) 783-1965	- 1
Sandra	Cain	3975 S.W 1St Parkway	San Diego	CA	92154	(619) 297-5327	
Sandra Alan	Lissner	9997 N Adams Rd	Spring Valley	CA	91977	(619) 736-7622	

Now go back to the **Mini Correspondence** database and pull down the **Letter** menu. The last item in this menu will print a customized letter to each selected person in the My Mailing List database.

File	Edit	Letter	Template	Setup	Wizards				
	-	New Blank Letter (Sans Serif 9 pt)							
		New I	etter to "Melis	sa Whe	eler" (My Mailing List)				
		Open Correspondence List Window							
		Save							
		Page Setup							
		Print	This Letter						
		Print	4 Mail Merge I	Letters	(My Mailing List)				

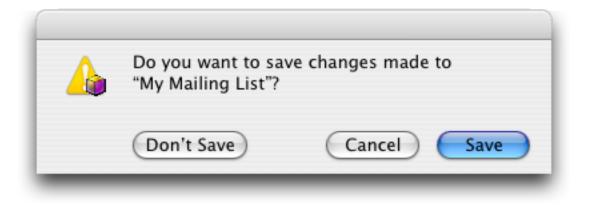
The wizard will print 4 customized letters.

	October 25th, 2000		
	Alan Lissner 9997 N Adams Rd		
	Spring Valley, CA 91977		
	October 25th, 2000		
	Sandra Cain 3975 S.W. 1St Park way San Diago, CA 92154		
<b>I</b>	San Diedo, 114 92154		
Octo	ber 25th, 2000		
93 M	Harrison Iorton Ter Diego ,CA 92123		
Can i	7eg0,CH 72123	<b>.    </b>	
October	25th, 2000		
Melissa V			
	' Burnside Dr ,CA 91942		
De ar Me	lissa,	Ш.	
the enclo	lding a special sale at the end of this month that I'm sure you won't want to miss out on. Bring sed coupon for an extra 10% savings. Everything in the store will be discounted at least 20% 9th, 30th, and 31 st. Don't miss it!	11	
Sincerel	У,	L.	
James Ri			
Presiden	t		

See "<u>Printing a Mail Merge Letter</u>" on page 710 to learn more about printing mass mailings with Panorama.

# **Tidying Up**

Your mailing list database is complete, so now is the time to save your work permanently. Choose **Quit** from the File Menu (OS 9 or Windows) or the Panorama Menu (OS X). If you have made any changes to your database since the last time it was saved, Panorama will ask you if you wish to save the database. You do, so click the **Save** button.

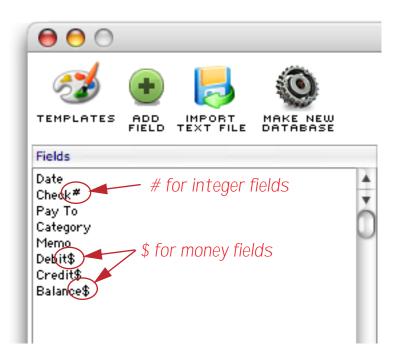


Congratulations! You've successfully created and used your first Panorama database (you were following along on your computer, right?). Now that you've mastered the basics you're ready to move on to some more advanced techniques.

# Lesson 2: Building and Organizing a Checkbook

Now that you've created your first simple mailing list database, you're ready to try something more complicated. In this lesson you'll build and use a database for keeping track of a checkbook. Start by launching Panorama and the **New Database Wizard**.

The checkbook database will have eight fields — Date, Check, Pay To, Category, Memo, Debit, Credit and Balance. (See "Fields" on page 213 for a complete explanation of fields.) Type in the name of each field into the wizard, with each name on a separate line. The four numeric fields have special suffixes. The Check field has a suffix of # to tell the wizard to create an integer numeric field (1, 2, 3, etc.). The Debit, Credit and Balance fields have a suffix to create a 2-digit numeric field (12.34, 813.94, 8.43 etc.). (Note: These suffixes are only used when creating databases with the New Database Wizard (see "Creating Numeric and Date Fields" on page 74). When creating fields with the Add Field command (see "Add Field" on page 215) or the Design Sheet (see "The Design Sheet" on page 218) you can use any field name with any field type you like.)



When you press the Make New Database tool the wizard will create a new database for you. The database is displayed using a row and column format called the **data sheet**. The new database contains one blank record (line) and eight fields (columns).

0	0					Untitled		
•	Date	Chec	Рау То		Category	Memo	Debit	Credit 🔺
29	-							
~								
								- 11
								- 11
4								- 11
-								- 11
-								- 11
								<u> </u>
								A V
	1 visibl	e/1 tota	i []≺	••	)			) ◀ ► //.

Page 91

Math Fields Setup Wizards File View Text Search Sort D rama Edit ŝ 00 ▶ d Font 9 point Size Date Chec Pay To Credit \* ► Debit 10 √ 12 14 18 24 36 48 Up ₩[ ۰ Down ₩] ¥ 1 visible/1 total ) + + Other...

The eighth column, Balance, is not visible. To make it visible reduce the text size to 9 pt.

Now all of the columns are visible within the window.

0	0				Untitled				
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	*
22									č
8~									4
<b>??</b> ≁ ₿									

# Loading the Data

To demonstrate Panorama's organizational features you'll need to type in a bunch of data. That doesn't sound like much fun, does it? Didn't think so. To help you out we've created a database that is programmed to automatically fill your new checkbook database with sample data. Start by choosing **Favorite Databases** from the Wizard menu (see "<u>The Favorite Databases Wizard</u>" on page 60). The database you need is called Sample Checkbook. To locate it, type **sample** into the search area a the top of the window, then click on Sample Checkbook.

Q sample		8	🗹 Nan	ne 📃 Fo	lder 📃 Info	
Favorites (7 visible/72 total)	Info	Location	Fields	Forms	Procedures	
<ul> <li>Music Video Samples</li> <li>My Sample Invoices</li> <li>Sample Alerts</li> <li>Sample Checkbook</li> </ul>	Folder : Sample Data Created : Mon, Oct 30, 2000 @ 5:32 AM Modified : Thu, Jan 25, 2001 @ 5:09 AM Size : 7,940 bytes (65 records) Description					
💋 Sample Dialogs 询 Sample Price List						
Trigger Samples	Step t tutori databi with s match the file	utorial. Afi al price list ase to autor ample data you will be olds. If this check the	ter you h t databas matically . If the d e asked i question	have crea se you cai fill your latabase f f you wai h appears	n open this price list fields do not nt to adjust make sure to	

Double click on the Sample Checkbook file to open it. A small window will appear briefly. The database has been pre-programmed to automatically transfer one year's worth of sample checkbook data into the new database you have created.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance
01/01/98		OPENING BALAN	DEPOSIT			12,739.0	12,739.0
01/01/98	100	Sparkletts	Office Supplies		14.20	·	12,724.8
01/01/98	101	Blue Cross	Insurance	Health Insurance group XBG-87:	975.00		11,749.8
01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.9
01/01/98	103	AT&T	Telecom	Long Distance Phone Service	236.24		11,463.6
01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,413.6
01/01/98	105	United Security	Utilities	Alarm	30.00		11,383.6
01/01/98	106	UPS	Shipping		144.02		11,239.6
01/01/98	107	Edison General	Utilities	January Electric	115.55		11,124.1
01/01/98	108	City Services	Utilities	Water	54.39		11,069.7
01/01/98	109	Pacific Properti	Rent	January Rent	1,580.00		9,489.71
01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,352.76
01/01/98	111	General Casualty	Insurance	Property Insurance policy YX42	187.50		9,165.26
01/01/98	112	Hamilton Davis	Insurance	Worker's Comp policy 81722-1	92.00		9,073.26
01/02/98		DEPOSIT	DEPOSIT			5,985.82	15,059.0

You may want to adjust the widths of some of the columns (see "<u>Adjusting Column Widths, Font and Size</u>" on page 16).

0	🖲 🖯 Untitled									
Þ	Date	Checl	Pay To 😁 🏲	Category	Memo	Debit	Credit	Balance		
2	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739.00		
¥	01/01/98	100	Sparkletts	Office Supplies		14.20		12,724.80		
, 22	01/01/98	101	Blue Cross	Insurance	Health Insurance group XE	975.00		11,749.80		
22	01/01/00	100	U. U C	114:1:4:	114:	40.00		11 200.00		

Before continuing you should use the **Save** command in the File menu to save your new creation. The first time you save any file Panorama will ask you to give it a name. You'll also want to check the **Save** Window Positions option (see "Saving Window Positions" on page 86). When everything is set up press the **Save** button. (To see what this dialog looks like on the PC see "Saving Your Work" on page 11.)

type in name of	file select folder you want to save	file in
Save	Save As: My Checkbook	
	Tutorial	0
<ul> <li>Network</li> <li>Jaguar</li> <li>Jaguar</li> <li>Classic</li> <li>Panther</li> <li>Alaska</li> <li>Fire Jaguar</li> <li>Fire Panther</li> <li>Fire Classic</li> <li>Fire Alaska</li> <li>iSightWeb ▲</li> <li>CocoaGest ▲</li> <li>Desktop</li> <li>Operations</li> <li>Applications</li> <li>jimrea</li> <li>Documents</li> </ul>	Name A	Date Modified         Today
Automatic save	Text Only O Set after 20 minutes opy (.b) of database ositions O No windows	
New Folder	Tell Panorama to save window positions Ca	ncel Save

You may also want to add your new file to the **Favorite Database** wizard. See "<u>Adding A Database To Your</u> <u>List Of Favorites</u>" on page 36 for a refresher on how to do this.

# Analyzing the Checkbook

In the next few sections you'll learn several techniques for extracting useful information from any database.

# **Selecting Data**

To select all office supply expenditures, click anywhere in the Category column.

0	0			My C	heckbook				
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	P
22	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739.00	iD
Å	01/01/98	100	Sparkletts	Office Supplies		14.20		12,724.80	
	01/01/98	101	Blue Cross	Insurance	Health Insurance group XE	975.00		11,749.80	1
33	01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.90	1
$\mathbf{a}$	01/01/98	103	AT&T	Telecom	Long Distance Phone Serv	236.24		11,463.66	
	01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,413.66	1
$\vdash$	01/01/98	105	United Security	Utilities	Alarm	30.00		11,383.66	1
4	01/01/98	106	UPS	Shipping		144.02		11,239.65	1
-	01/01/98	107	Edison General	Utilities	January Electric	115.55		11,124.10	1
	01/01/98	108	City Services	Utilities	Water	54.39		11,069.71	1
_	01/01/98	109	Pacific Properties	Rent	January Rent	1,580.00		9,489.71	1
-	01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,352.76	1
	01/01/98	111	General Casualty	Insurance	Property Insurance policy	187.50		9,165.26	1
	01/01/98	112	Hamilton Davis	Insurance	Worker's Comp policy 81	92.00		9,073.26	I

Next, choose **Find/Select** from the Search menu. (You can also open the **Find/Select** dialog by clicking on the number of records in the lower left hand corner of the window). Type office supplies.

	Find/Select Data
Cancel	Find %F Select %S Select Within %L Select Additional %M
Category	Contains     Office Supplies
and Category	÷ (

When you press the **Select** button (or the **Enter** key) Panorama will select the 73 checks for office supplies in the database. All of the other checks will become temporarily invisible.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance
01/01/98	100	Sparkletts	Office Supplies		14.20		12,724.80
01/05/98		Office Max	Office Supplies		170.47		14,888.62
01/05/98	116	Kinko's	Office Supplies		50.03		12,834.90
01/19/98	131	Staples	Office Supplies		126.83		11,121.61
01/19/98	133	Costco	Office Supplies		207.23		10,742.59
01/26/98	135	Kinko's	Office Supplies		45.24		15,152.15
02/02/98	150	Sparkletts	Office Supplies		13.98		15,438.93
02/09/98	153	Fry's Electronics	Office Supplies		192.48		15,619.94
02/09/98	156	Office Max	Office Supplies		129.61		14,249.99
02/09/98	160	Costco	Office Supplies		208.60		11,314.52
02/16/98	161	Fry's Electronics	Office Supplies		166.74		16,391.84
02/16/98	169	Kinko's	Office Supplies		52.23		9,753.32
02/23/98	172	Kinko's	Office Supplies		133.51		12,664.95
02/23/98	175	Staples	Office Supplies		41.30		12,533.02
03/02/98	179	Staples	Office Supplies		82.76		17,022.83

To select only the office supply expenditures in October 1998, re-open the **Find/Select** dialog. Use the pop up menus to change the second line to Date and Equal, then type in oct 98. When you want to select an entire month you must spell out the month, for example nov 02 or january 1997. You can also select a single day, for example 3/7/96 or August 15, 2001 (see "Locating Dates by Month, Quarter, or Year" on page 339).

		Find/Select Data	
(	Cancel	Find #F Select #S Select Within #L Select Additional #M	)
(	Category	Contains 🗘 Office Supplies	]
and	Date 🔈	Cequals Cect 98	]
and	Check	÷	
and	Pay To	÷	1
and	Category Memo	÷	]
and	Debit Credit Balance	*	]

Press the **Select** button (or the **Enter** key) to see the 8 checks for office supply expenses in October 1998.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance
10/01/98	453	Sparkletts	Office Supplies		12.20	17	,730.80
10/05/98		Kinko's	Office Supplies		135.46		,173.39
	468	Fry's Electronics	Office Supplies		133.27		,504.09
10/12/98	469	Office Max	Office Supplies		22.03	20	,482.06
10/12/98	472	Kinko's	Office Supplies		89.03		,620.87
10/19/98	473	Costco	Office Supplies		169.71		,157.41
10/19/98	476	Office Max	Office Supplies		68.18	19	,131.77
10/26/98	485	Staples	Office Supplies		162.37	18	,702.39

When you want to see all of the checks again, choose **Select All** from the Search menu. You can also undo the sixteen most recent selections with the **Undo** command in the Edit menu (see "<u>Undo Select</u>" on page 344).

#### **Calculating the Grand Total**

To calculate the grand total of all the checks in the database start by clicking anywhere in the Debit column.

0	00			My C	heckbook				
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	*
29	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739.00	1
¥	01/01/98	100	Sparkletts	Office Supplies		14.20	·	12,724.80	
	01/01/98	101	Blue Cross	Insurance	Health Insurance group XE	<b></b> 975.00		11,749.80	
33	01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.90	
	01/01/98	103	AT&T	Telecom	Long Distance Phone Serv	236.24		11,463.66	

Next, choose the **Total** command from the Math menu. Panorama will add a new record to the end of the database. This new record is called a summary record (see "<u>Summary Records</u>" on page 209), and it contains the grand total for all the checks.

12/25/98		DEPOSIT	DEPOSIT		0/7 57	5,264.90	18,949.36
		Valley Publications Poly Payroll Servi			963.57 1,749.38		17,985.80 16,236.42
516 visit	Ja /E1	6 total			225,677.		
	_			blue background		grand	

As you can see the column isn't quite wide enough to display the entire grand total. You can drag on the column name to adjust the width (see "<u>Adjusting Column Widths, Font and Size</u>" on page 16).

•	Date	Checl	Pay To	Category	Memo	💙 Debit	Credit	Bala
♀ ≪ ₽ ▲ ★	12/21/98	551	Coast General	Purchases	Invoice 61471	275.72		17,960
4	12/21/98	552	Office Depot	Office Supplies		72.46		17,888
	12/21/98	553	Staples	Office Supplies		74.81		17,813
5	12/21/98	554	Century Equipment	Fixed Assets		1,063.90		16,749
	12/21/98	555	Stamford Mfg	Purchases	Invoice 19188	472.37		16,277
-	12/21/98	556	Post Office	Shipping		204.62		16,072
▶	12/21/98	557	Power Printing	Advertising		542.50		15,530
•	12/21/98	558	Poly Payroll Servi	Payroll		1,656.55		13,873
r	12/21/98	559	Fry's Electronics	Office Supplies		189.22		13,684
	12/25/98		DEPOSIT	DEPOSIT			5,264.90	18,949
	12/28/98	560	Valley Publications	Advertising		963.57		17,985
	12/28/98	561	Poly Payroll Servi	Payroll		1,749.38		16,236
						225,677.47		

When you are finished looking at the grand total use the **Cut Record** tool to delete it (or press the **Delete** key, see "<u>Deleting a Record</u>" on page 273).

Page 97

#### **Calculating Subtotals**

To calculate the grand total you created a single summary record at the end of the database. To calculate subtotals you must create a summary record for every category you want to subtotal. This is done with the **Group Up** command in the Sort menu. As an example you'll create subtotals for each month, and sub-subtotals for each category within each month. Start by clicking anywhere in the Date column and choosing **Group Up** from the Sort menu.

6	👌 Pano	oram	na File	Edit	View	Fields	Text	Search	Sort	Math	Setup	Wizard
•	0				My (	Checkbo	ok		Sort	Up		жU t
Þ	Date	Checl	Pay To	(	Category	Memo			Sort	Up Wit	hin	
22 Ƴ∽ ⊒27	01/01/98 01/01/98 01/01/98 01/01/98 01/01/98	101 102	OPENING BALAI Sparkletts Blue Cross Valley Gas AT&T	(   	EPOSIT Office Supplies nsurance Jtilities Felecom	Health In Heating	surance gr		075.00	Down Down	Within	
● → →	01/01/98 01/01/98 01/01/98 01/01/98 01/01/98	104 105 106 107	Surf Networks United Security UPS Edison General City Services	1 y L 9 L	Felecom Jtilities Shipping Jtilities Jtilities	DSL Alarm January Water				up U <u>p</u> up Dow up	<b>n</b> 1,000 1,239 11,124	
	01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/02/98	109 110 111	Pacific Propert Valley Bell General Casual Hamilton Davis DEPOSIT	ties F 1 ty I : I	Rent Felecom nsurance nsurance DEPOSIT	January Local Pho Property	Rent one Service Insurance Comp poli	policy	Gro	by Col up by C	olor	
	515 visi	ble/51	5 total 📗	4   • (		-	-	-	Rem	line Lev nove Su nove De	mmaries	
									Тод	gle Sun	nmary Le	vel

Since the field being grouped contains dates, Panorama will ask what time period you want to use. The Month option is already selected, so just press **Group**.

🖯 Day	
O Week	
Month	
~	
Quarter	
() Year	
Group	)
	3
Cancel	)

At first it may appear that nothing has happened. However, if you scroll the database down you will see that Panorama has created a summary record after each month. It also creates an extra summary record at the bottom of the database for the grand total. You can identify summary records easily because— 1) they are bold, and 2) they have a little plus sign to the left of the first column.

0	0			My Ch	eckbook			
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal
22	01/26/98	135	Kinko's	Office Supplies		45.24		15,15
¥	01/26/98	136	Poly Payroll Servi			1,793.43		13,35
0	01/30/98		DEPOSIT	DEPOSIT		ŕ	4,664.34	18,02
33	01/30/98						ŕ	
۵.	02/02/98	137	City Services	Utilities	Water	48.99		17,97
	02/02/98	138	Valley Gas	Utilities	Heating	47.99		17,92
ŧ	02/02/98	139	UPS	Shipping		57.08		17,86

summary record for January 1998

29	02/23/98	175	Staples	Office Supplies		41.30		12,53
3×	02/27/98		DEPOSIT	DEPOSIT			5,222.99	17,75
	02/27/98							
33	03/02/98	176	AT&T	Telecom	Long Distance Phone Serv	257.15		17,49
<b>A</b>	03/02/98	177	General Casualty	Insurance	Property Insurance policy	187.50		17,31

\ summary record for February 1998

		- · -	· · · · · · · · · · · · · · · · · · ·				, 🗨
	03/30/98	219	Post Office	Shipping		305.84	14,26
<b>H</b>	03/30/98	220	Airborne	Shipping	Invoice 84971	33.19	14,23
4	03/30/98						
	04/01/98	221	City Services	Utilities	Water	49.65	14,18
	04/01/98	222	Surf Networks	Telecom	DSL	50.00	14,13

summary record for March 1998

	12/21/98	559	Fry's Electronics	Office Supplies	189.22		13,68
<b>N</b>	12/25/98		DEPOSIT	DEPOSIT		5,264.90	18,94
<b>×</b>	12/28/98	560	Valley Publications	Advertising	963.57		17,98
	12/28/98	561	Poly Payroll Servie	Payroll	1 ,749.38		16,23
N.	12/28/98						
and the second							4
-							
	528 visib	e/528	itotal 🛛 🖛 🕨 (				) + + //

summary record for April 1998

summary record for grand total

Now click anywhere in the Category column, then choose **Group Up** from the Sort menu. Panorama will create a summary record after each category within each month.

•	00			IVIY CI	eckbook			
	Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal
2	01/19/98	130	FedEx	Shipping	Invoice 75951	160.97		11,24
~	01/19/98	132	Champion Trucking	Shipping	Invoice 26309	171.79		10,94
				Shipping				
j.	01/01/98	103	AT&T	Telecom	Long Distance Phone Serv	236.24		11,46
5	01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,41
	01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,35
				Telecom				
×.	01/01/98	102	Valley Gas	Utilities 🕨 👘	Heating	49.90		11,69
·	01/01/98	105	United Security	Utilities	Alarm	30.00		11,38
	01/01/98	107	Edison General	Utilities	January Electric	115.55		11,12
	01/01/98	108	City Services	Utilities	Water	54.39		11,06
				Utilities				
4	01/30/98							
	02/09/98	154	Valley Publications	Advertising		923.74		14,69
	02/09/98	159	Power Printing	Advertising		654.04		11,52

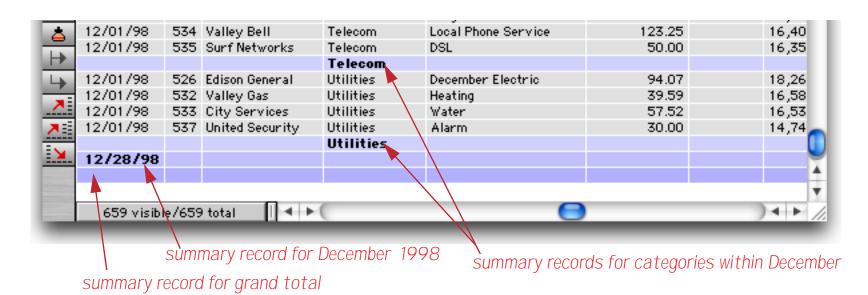
### summary record for January 1998

02/02/98 17,46 141 AT&T 351.56 Telecom Long Distance Phone Serv 02/02/98 145 Valley Bell Telecom Local Phone Service 113.05 17,04 Telecom 02/02/98 137 City Services 48.99 17,97 Utilities Water 02/02/98 17,92 138 Valley Gas Utilities Heating 47.99 02/02/98 17,43 142 United Security Utilities Alarm 30.00 02/02/98 149 Edison General Utilities February Electric 109.06 15,45 Utilities 02/27/98 03/02/98 190 Valley Publications Advertising 1,051.99 10,57 summary records for categories within February

'summary record for February 1998

	03/02/98	193	Valley Bell	Telecom	Local Phone Service	147.80	10,21
₽				Telecom			
L.	03/02/98	183	Valley Gas	Utilities	Heating	24.23	13,88
	03/02/98	185	Edison General	Utilities	March Electric	105.50	13,71
	03/02/98	191	United Security	Utilities	Alarm	30.00	10,54
<b>×</b>	03/02/98	197	City Services	Utilities	Water	49.23	9,32
				Utilities			
M	03/30/98						
and the second	04/13/98	241	Foundation Web Ser	Advertising		702.99	15,41 📤
	T				Summary records	for categories	within March

'summary record for March 1998



Once the summary records are set up, you're ready to actually calculate the subtotals. Click anywhere in the **Debit** column and choose **Total** from the Math menu. The **Total** command will calculate a grand total, subtotals for each month, and subtotals for each category within each month.

۲	0	My Checkbook									
Þ	Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal			
٠.	01/19/98	130	FedE×	Shipping	Invoice 75951	160.97		11,24			
¥	01/19/98	132	Champion Trucking	Shipping	Invoice 26309 Jan shipp	ina 🥿 171.79		10,94			
				Shipping		540.39					
17	01/01/98	103	AT&T	Telecom	Long Distance Phone Serv	236.24		11,46			
۵.	01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,41			
	01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,35			
•				Telecom		423.19					
•	01/01/98	102	Valley Gas	Utilities	Heating Jan tele	COM 49.90		11,69			
· ·	01/01/98	105	United Security	Utilities	Alarm	30.00		11,38			
7	01/01/98	107	Edison General	Utilities	January Electric	115.55		11,12			
	01/01/98	108	City Services	Utilities	Water Jan utili:	ties 54.39		11,06			
				Utilities	Janutin	249.84					
	01/30/98					17,202.48					
	02/09/98	154	Valley Publications	Advertising		923.74		14,69			
	02/09/98	159	Power Printing	Advertising		654.04		11,52 1			

# subtotal for January 1998

o D	02/02/98	141	AT&T	Telecom	Long Distance F	Phone Serv	351.56	17,46
33	02/02/98	145	Valley Bell	Telecom	Local Phone Se	rvice	113.05	17,04
<b>a</b>				Telecom			-514.61	
	02/02/98	137	City Services	Utilities	Water	Feb telec	com 48.99	17,97
→	02/02/98	138	Valley Gas	Utilities	Heating		47.99	17,92
L.	02/02/98	142	United Security	Utilities	Alarm		30.00	17,43
	02/02/98	149	Edison General	Utilities	February Elect	Feb utiliti	109.06	15,45
				Utilities			236.05	
<b>X</b>	02/27/98						19,773.29	
E V	03/02/98	190	Valley Publications	Advertising			1 ,051.99	10,57

#### / subtotal for February 1998

<b></b>	03/02/98	193	Valley Bell	Telecom	Local Phone Se	ervice	147.80	10,21 🖳
				Telecom			454.94	
	03/02/98	183	Valley Gas	Utilities	Heating	Mar telec	om 24.23	13,88
4	03/02/98	185	Edison General	Utilities	March Electric	C	105.50	13,71
	03/02/98	191	United Security	Utilities	Alarm		30.00	10,54
	03/02/98	197	City Services	Utilities	Water	Mar utilitie	49.23	9,32
<b>×</b>				Utilities			208.95	
	03/30/98						21,908.19	
M	04/13/98	241	Foundation Web Ser	Advertising			702.99	15,41
and the second second	! !						/	· A

# subtotal for March 1998

4	12/01/98	534	Valley Bell		Telecom	Local Phone S	Service	123.25	1	6,40
	12/01/98	535	Surf Networks		Telecom	DSL		50.00	1	6,35
₽					Telecom			449.00		
4	12/01/98	526	Edison General		Utilities	December Ele	Dec teleco	om <b>449.00</b> 94.07	1	8,26
	12/01/98	532	Valley Gas		Utilities	Heating		39.59	1	6,58
× ×	12/01/98	533	City Services		Utilities	Water		57.52	1	6,53
<b>X</b> E	12/01/98	537	United Security		Utilities	Alarm	Dec utilitie	30.00	1	4,74 👝
					Utilities		Doo atiintio	221.17		
м	12/28/98			<u> </u>	btotal for Dec	ombor 100	10	18,053.95		
-				Su		emper 199	0	225,677.47		4
	659 visible	e/659	total 🛛 🖣	+ (	(					· · //
						_	_		_	

Grand Total

# Hiding and Showing Detail

It's difficult to get a feel for the subtotals when they are mixed in with the raw data. To collapse the database so that only the monthly totals are visible, choose the **Outline Level** command in the Sort menu.

	00			My Cł	Sort	Un	Setup	жU		<u> </u>
T 👔	Date	Cheel	Pay To	Category	5010	Up Wit	hin	Debit	Credit	Bal 🔺
		Checi	Fay IO	Category	5011	op with		Debit	creat	
22	12/14/98		Post Office	Shipping	<i>c</i> .	-		325.57		15,90
3C	12/21/98	556	Post Office	Shipping	Sort	Down		204.62		16,07
				Shipping	Sort	Down \	Nithin	,084.98		
22	12/01/98		AT&T	Telecom	Long Dista	Domini	39.0	275.75		17,99
۵.	12/01/98		Valley Bell	Telecom	Local Phor	ne Service		123.25		16,40
- →	12/01/98	535	Surf Networks	Telecom Telecom	Grou	ıp Up		50.00		16,35
	12/01/98	526	Edison General	Utilities	Grou	p Dow	n	94.07		18,26
4	12/01/98		Valley Gas	Utilities				39.59		16,58
7	12/01/98		City Services	Utilities	Grou	ib		57.52		16,53
7	12/01/98		United Security	Utilities	Alarm			30.00		14,74
				Utilities	Sort	by Cold	or	221.17		
<u> </u>	12/28/98				Grou	p by C	olor	,053.95		-
	450 - J-31	. 1454		(	Outl	ine Lev	el		_	Ť
-	659 visib	le7655	) total 🛛 🗐 📕 I				R	_	-	) • • //
					Rem	ove Sur	nmaries			
					Rem	ove Det	tail			
					Kenn	ove De	.an			
					Togo	gle Sum	mary Le	vel		

The **Outline Level** dialog shows how you have grouped the data. At the top is the raw data, all 515 records. The next level is the Category, then the monthly summaries. At the bottom level is the grand total. To collapse the database so that only the monthly totals are visible, press the 2 button.

Outline Leve	el
	Cancel
DATA	515 records
1 Category	131 records
Date (by month)	12 records
GRAND TOTAL	1 record

When you press the button the database collapses so that only the twelve monthly totals and the grand total are visible. Everything else is hidden. You can quickly see that March was the month with the highest spending and July the month with the lowest spending.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal
01/30/98	:				17,202.48		
<ul><li>02/27/98</li></ul>					19,773.29		
03/30/98	:				21,908.19		
<ul> <li>01/30/98</li> <li>02/27/98</li> <li>03/30/98</li> <li>04/27/98</li> <li>05/29/98</li> <li>06/29/98</li> <li>07/31/98</li> </ul>	:				17,708.77		
05/29/98	:				20,072.21		
06/29/98	:				18,958.28		
07/31/98	:				15,803.58		
08/31/98					21,410.34		
09/28/98					16,210.08		
10/30/98					17,991.62		
11/30/98	:				20,584.69		
12/28/98	:				18,053.95		
08/31/98 09/28/98 10/30/98 11/30/98 12/28/98					225,677.47		

Why was the spending almost 22,000 dollars in March? To find out, click anywhere on the March summary record.

00			My Checkbook			
🜔 Date	Checl Pay T	To Categor	ry Memo	Debit	Credit	Bal 🔺
2 01/30/9	98			17,202.48		
9 02/27/9	98			19,773.29		
03/1 2/9	98			21,908.19		
04/27/	98			17,708.77		0
<b>65/29/</b>	98			20,072.21		U
06/29/9	98			18,958.28		
				45 007 50		

Now click on the **Expand** tool.

0	0			My	Checkbook			
Þ	Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal
22 ✓ 27 ▲ ◆	01/30/98					17,202.48		
ħ	02/27/98					19,773.29		
	03/30/98					21,908.19		
27	04/27/98					17,708.77		
•	05/29/98					20,072.21		
-	06/29/98					18,958.28		
*	07/31/98					15,803.58		
ŧ	08/31/98					21,410.34		
- =	00100100					16,210.08		
	Expand					17,991.62		
1	11/30/98					20,584.69		
<u>н</u> Х	12/28/98					18,053.95		
×.						225,677.47		
	13 visibl	/659	total II-	< > C			).	4 Þ.

The **Expand** tool reveals the next level of detail, in this case the **Category** summaries for the month of March.

0	00			My Ch	neckbook			
Þ	Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal
22. ≁~ ₽	01/30/98					17,202.48		
4	02/27/98					19,773.29		
				Advertising		2,202.67		
G.				DEPOSIT		0.00		1
\$				Fixed Assets		1,363.94		
				Insurance		1,254.50		
•				Office Suppli		1 ,043.33		
•				Payroll		9,123.23		
= =				Purchases		3,447.93		
				Rent		1 ,580.00		
				Shipping		1 ,228.69		
				Telecom		454.94		
<b></b>				Utilities		208.95		
	03/30/98					21,908.19		
	04/27/98					17,708.77		
	24 visibl	e/659	total				)	4 1

To see the actual checks that make up a particular category, just click on the category and then choose the **Expand** tool again.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Bal
2 01/30/98 2 02/27/98 3					17,202.48		
62/27/98					19,773.29		
7			Advertising		2,202.67		
J.			DEPOSIT		0.00		
5			Fixed Assets		1,363.94		
			Insurance		1,254.50		
			Office Suppli		1 ,043.33		
			Payroll		9,123.23		
Ermand			Purchases		3,447.93		
Expand			Rent		1 ,580.00		
Expand			Shipping		228.69, 1		
			Telecom		454.94		
			Utilities		208.95		
03/30/98					21,908.19		
04/27/98					17,708.77		

Now the actual checks are visible for each purchase in March.

	Date	Checl	Pay To	Category	Memo	Debit	Credit	Ba
2 ≪ 27 ▲ ◆				Payroll		9,123.23		
4	03/02/98	178	Oregon National Eng	Purchases	Invoice 64191	205.77		17,10
	03/02/98	181	Tech Media	Purchases	Invoice 8910	556.72		15,49
<u> </u>	03/02/98	194	Precision Plastics	Purchases	Invoice 10488	498.49		9,72
5	03/09/98	198	Clark Supply	Purchases	Invoice 47372	318.44		13,33
-	03/09/98	200	Telon Productions	Purchases	Invoice 26984	265.12		12,95
*	03/16/98	206	Clark Supply	Purchases	Invoice 73927	328.26		14,34
•	03/16/98	207	Oregon National Eng	Purchases	Invoice 73178	336.09		14,00
	03/30/98	214	Telon Productions	Purchases	Invoice 18763	326.98		17,20
	03/30/98	215	Precision Plastics	Purchases	Invoice 42862	411.58		16,79
	03/30/98	218	Miller Industries	Purchases	Invoice 47187	200.48		14,56
				Purchases		3,447.93		
★				Rent		1,580.00		
				Shipping		1,228.69		
				Telecom		454.94		
				Utilities		208.95		
	03/30/98					21,908.19		
	04/27/98					17,708.77		
	05/29/98					20,072.21		

If you want to hide the detail again use the **Collapse** tool.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Ba
03/02/98 03/02/98 03/02/98 03/09/98 03/09/98 03/09/98 03/09/98			Payroll		9,123.23		
03/02/98	178	Oregon National Eng	Purchases	Invoice 64191	205.77		17,10
03/02/98	181	Tech Media	Purchases	Invoice 8910	556.72		15,49
03/02/98	194	Precision Plastics	Purchases	Invoice 10488	498.49		9,72
03/09/98	198	Clark Supply	Purchases	Invoice 47372	318.44		13,33
03/09/98	200	Telon Productions	Purchases	Invoice 26984	265.12		12,95
	206	Clark Supply	Purchases	Invoice 73927	328.26		14,34
03/16/98	207	Oregon National Eng	Purchases	Invoice 73178	336.09		14,00
<u>-</u> 03/30/98	214	Telon Productions	Purchases	Invoice 18763	326.98		17,20
03/16/98 03/30/98 03/30/98	215	Precision Plastics	Purchases	Invoice 42862	411.58		16,79
03/30/98	218	Miller Industries	Purchases	Invoice 47187	200.48		14,56
			Purchases		3,447.93		
Collaps	e		Rent		1,580.00		
			Shipping		1,228.69		
			Telecom		454.94		
			Utilities		208.95		
03/30/9	8				21,908.19		
04/27/9	8				17,708.77		
05/29/9	8				20,072.21		

To learn more about expanding and collapsing summaries see "<u>STEP 3 - OUTLINE</u>" on page 387.

## Sorting Summaries by Value

Summary records are normally sorted alphabetically by category, but you can resort them by value to produced a ranked list from highest to lowest. As an example we'll sort the **Category** subtotals within each month to find out the highest spending categories in each month. Start by choosing the **Outline Level** command from the Sort menu, then press the **1** button.

Outline Level	
	Cancel
DATA	515 records
Category	131 records
2 Date (by month)	12 records
3 GRAND TOTAL	1 record

Now both the monthly and category summaries are visible, but the raw data is not visible. The category summaries are sorted alphabetically within each month (the window has been expanded to show three months worth of data).

0			My Ch	neckbook			
Date	Checl	Pay To	Category	Memo	Debit	Credit	Bala
			Advertising		1,114.85		
			DEPOSIT		0.00		
			Insurance		1,254.50		
			Office Suppli		614.01		
			Payroll		7,319.30		
			Purchases		4,106.41		
			Rent		1,580.00		
			Shipping		540.39		
			Telecom		423.19		
			Utilities		249.84		
01/30/98					17,202.48		
			Advertising		3,874.92		
			DEPOSIT		0.00		
			Fixed Assets		1 ,974.81		
			Insurance		1 ,254.50		
			Office Suppli		938.45		
			Payroll		6,966.12		
			Purchases		2,135.08		
			Rent		1,580.00		
			Shipping		298.76		
		1	Telecom		514.61		
			Utilities		236.05		
02/27/98					19,773.29		
			Advertising		2,202.67		
			DEPOSIT		0.00		
			Fixed Assets		1,363.94		
			Insurance		1 ,254.50		
			Office Suppli		1 ,043.33		
			Payroll		9,123.23		
			Purchases		3,447.93		
			Rent		1,580.00		
			Shipping		1,228.69		
			Telecom		454.94		
			Utilities		208.95		
03/30/98					21,908.19		
			Advertisina		2.631.00		

Now click anywhere in the **Debit** column, then choose **Sort Down** from the Sort menu. We're using **Sort Down** instead of **Sort Up** because we want the largest values at the top.

View Field	ls Text	Search	Sort	Math	Setup	Wizards	ē 🔋	> 191 [	, ∢))
			Sort	Up Che	ckbook	жU			
Date Date	Checl Pa	ay To	Sort	Up Wit	hin		Debit	Credit	Bala 📥
			Sort	Down			1,114.85 0.00		ć
				Down \	Within	*	1,254.50 614.01		
<u> </u>			Gro	up Up			7,319.30		
+			Dont	up Dow	n		1,580.00		
			Gro				423.19		
			Utilit				247.84		

click on Debit field before sorting

Within each month, the Category subtotals are now sorted by value from highest to lowest. Now you can easily see that payroll is the largest spending category in each month. Rent and advertising are consistently near the top, while telecom and utilities are consistently near the bottom.

0		My Ch	eckbook			
Date	Checl Pay To	Category	Memo	Debit	Credit	Bala
		Payroll		7,319.30		
		Purchases		4,106.41		
		Rent		1,580.00		
		Insurance		1,254.50		
		Advertising		1,114.85		
		Office Suppli-		614.01		
		Shipping		540.39		
		Telecom		423.19		
		Utilities		249.84		
		DEPOSIT		0.00		
01/30/98				17,202.48		
		Payroll		6,966.12		
		Advertising		3,874.92		
		Purchases		2,135.08		
		Fixed Assets		1,974.81		
		Rent		1,580.00		
		Insurance		1,254.50		
		Office Suppli-		938.45		
		Telecom		514.61		
		Shipping		298.76		
		Utilities		236.05		
		DEPOSIT		0.00		
02/27/98				19,773.29		
		Payroll		9,123.23		
		Purchases		3,447.93		
		Advertising		2,202.67		
		Rent		1,580.00		
		Fixed Assets		1,363.94		
	Insurance		1,254.50			
		Shipping		1,228.69		
		Office Suppli-		1,043.33		
		Telecom		454.94		
		Utilities		208.95		
		DEPOSIT		0.00		
03/30/98				21,908.19		
		Pavroll		6.726.87		
144 visib	le/659 total	A + (				4 1

If you'd like to see more detail about a particular summary just click on it and press the **Expand** tool.

	DEPOSIT	0.00	×
L 01/30/98		17,202.48	
No. Courses	Payroll	6,966.12	
Expand	Advertising	3,874.92	
	Purchases	2,135.08	
	Fixed Assets	1,974.81	
<u> </u>	Rent	1,580.00	
	Insurance	1,254.50	
	Office Suppli	938.45	
	Telecom	514.61	
	Shipping	298.76	

When Panorama sorted the summary records by value it also moved the corresponding data records so that you can expand to see the detail. Within each summary the data records have not been sorted by value, they are still sorted in their original order (by date).

Date	Checl	Pay To	Category	Memo	Debit	Credit	Ba
01/30/98			Insurance		1,254.50		
			Advertising		1,114.85		
			Office Suppli-		614.01		
-			Shipping		540.39		
			Telecom		423.19		
			Utilities		249.84		
			DEPOSIT		0.00		
01/30/98					17,202.48		
1			Payroll		6,966.12		
-			Advertising		3,874.92		
			Purchases		2,135.08		
1			Fixed Assets		1,974.81		
-			Rent		1,580.00		
			Insurance		1 ,254.50		
02/02/98		Sparkletts	Office Supplies		13.98		15,43
02/09/98		Fry's Electronics	Office Supplies		192.48		15,6
02/09/98		Office Max	Office Supplies		129.61		14,2
02/09/98		Costco	Office Supplies		208.60		11,3
02/16/98		Fry's Electronics	Office Supplies		166.74		16,3
02/16/98		Kinko's	Office Supplies		52.23		- 9,75
02/23/98		Kinko's	Office Supplies		133.51		12,6
02/23/98	175	Staples	Office Supplies		41.30		12,5
			Office Suppli-		938.45		
			Telecom		514.61		
			Shipping		298.76		
			Utilities		236.05		
			DEPOSIT		0.00		
02/27/98					19,773.29		
			Payroll		9,123.23		
			Purchases		3,447.93		
			Advertising		2,202.67		
			Rent		1 ,580.00		
			Fixed Assets		1,363.94		
			Insurance		1,254.50		
			Shipping		1,228.69		
			Office Suppli-		1.043.33		

To learn more about sorting summary values see "Sorting Within Groups" on page 399.

### **Removing Summary Records**

Summary records are designed to be temporary. When you are done examining the summary records you need to remove them to restore the database to it's original state. To do this choose the **Remove Summaries** command from the Sort menu. As you can see from the illustration, it doesn't matter whether the summary records are expanded or collapsed when you choose this command. The **Remove Summaries** dialog allows you to delete some or all of the summary records in the database.

Re	move Summaries			
Warning: No Undo!	Remove ALL Summaries Cancel			
1 Debit	131 records			
2 Category	12 records			
3 Date (by month)	1 record			

Since you want to remove all of the summary records press the **Remove All Summaries** button (or press the **Enter** key). This removes all of the summary records and leaves only the original data records. (If you want to learn how and why you would delete only some of the summary records see "<u>Getting Rid of Summary</u> <u>Records</u>" on page 399).

0			My Cł	neckbook			
Date	Checl	Pay To	Category	Memo	Debit	Credit	Bala
01/05/98	114	Poly Payroll Servi	Payroll		1,817.32		13,071
01/12/98	123	Poly Payroll Servi	Payroll		1,833.80		11,686
01/19/98	127	Poly Payroll Servi	Payroll		1,874.76		11,633
01/26/98	136	Poly Payroll Servi	Payroll		1,793.43		13,358
01/05/98	115	Oregon National Eng	Purchases	Invoice 35661	186.36		12,884
01/05/98	117	Boston Direct	Purchases	Invoice 57540	185.96		12,648
01/05/98	118	Precision Plastics	Purchases	Invoice 60632	459.86		12,189
01/05/98	119	Tech Media	Purchases	Invoice 48536	336.67		11,852
01/05/98	120	Miller Industries	Purchases	Invoice 90513	361.90		11,490
01/05/98	122	Anderson Manufact	Purchases	Invoice 17730	627.98		9,747
01/12/98	124	Anderson Manufact	Purchases	Invoice 79066	551.22		11,135
01/12/98	125	Clark Supply	Purchases	Invoice 91494	387.15		10,747
01/19/98		Tech Media	Purchases	Invoice 77138	350.01		13,508
01/19/98	129	Clark Supply	Purchases	Invoice 13589	160.71		11,409
01/26/98		Stamford Mfg	Purchases	Invoice 98266	498.59		15,191
01/01/98	109	Pacific Properties	Rent	January Rent	1,580.00		9,489
01/01/98		Blue Cross	Insurance	Health Insurance group XE	975.00		11,749
01/01/98	111	General Casualty	Insurance	Property Insurance policy	187.50		9,165
01/01/98	112	Hamilton Davis	Insurance	Worker's Comp policy 81	92.00		9,073
01/05/98	121	Cool Creek Studiio	Advertising		1,114.85		10,375
01/01/98		Sparkletts	Office Supplies		14.20		12,724
01/05/98		Office Max	Office Supplies		170.47		14,888
01/05/98	116	Kinko's	Office Supplies		50.03		12,834
01/19/98		Staples	Office Supplies		126.83		11,121
01/19/98		Costco	Office Supplies		207.23		10,742
01/26/98		Kinko's	Office Supplies		45.24		15,152
01/01/98	106	UPS	Shipping		144.02		11,239
01/19/98		Airborne	Shipping	Invoice 16582	63.61		11,570
01/19/98		FedEx	Shipping	Invoice 75951	160.97		11,248
01/19/98		Champion Trucking		Invoice 26309	171.79		10,949
01/01/98	103		Telecom	Long Distance Phone Serv	236.24		11,463
01/01/98		Surf Networks	Telecom	DSL	50.00		11,413
01/01/98		Valley Bell	Telecom	Local Phone Service	136.95		9,352
01/01/98		Valley Gas	Utilities	Heating	49.90		11,699
01/01/98		United Security	Utilities	Alarm	30.00		11,383
01/01/98		Edison General	Utilities	January Electric	115.55		11.124
515 visit							

Although the summary records are gone, the database still isn't quite back to its original state. Instead of the entries being sorted by date they are still sorted by category within each month. To get back to the original order click anywhere in the Date field and choose **Sort Up** from the Sort menu.

View	Fields	Tex	t Search	Sort	Math	Setup	Wizards	Ş 📘	<b>9</b>	<b>I</b> ()
	0			Sort	t Up		æυ			
٠	Date	Checl	Pay To	Sort	t Up Wit	hin		Debit	Credit	Bala 📥
2.9	01/05/98	114	Poly Payroll Ser					1,817.32		13,071
Å	01/12/98	123	Poly Payroll Ser	Sort	Down			1,833.80		11,686
	01/19/98	127	Poly Payroll Ser	Sort	Down	Nithin		1,874.76		11,633
55	01/26/98	136	Poly Payroll Ser	2011	Down	wittiin		1,793.43		13,358
*	01/05/98	115	Oregon National					186.36		12,884
<b>▲</b> +	01/05/98	117	Boston Direct	Gro	up Up		0	185.96		12,648
	01/05/98	118	Precision Plastic			nvoice 6063:	2	459.86		12,189
4	01/05/98	119	Tech Media	Gro	up Dow	n <sub>rolee</sub> 4853	6	336.67		11,852
_	01/05/98	120	Miller Industries	Gro	up		3	361.90		11,490
and the second	01/05/98	122	Anderson Manuf.	GIU	чр		0	627.98		9,747

The database still isn't quite back in the original order. Originally the check numbers were sorted within each day.

0	0			My Ch	neckbook			
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Bala
22	01/01/98	109	Pacific Properties	Rent	January Rent	1,580.00		9,489
R	01/01/98	101	Blue Cross	Insurance	Health Insurance group XE	975.00		11,749
_	01/01/98	111	General Casualty	Insurance	Property Insurance policy	187.50		9,165
33	01/01/98	112	Hamilton Davis	Insurance	Worker's Comp policy 81	92.00		9,073
•	01/01/98	100	Sparkletts	Office Supplies		14.20		12,724
_	01/01/98	106	UPS	Shipping		144.02		11,239
$\vdash$	01/01/98	103	AT&T	Telecom	Long Distance Phone Serv	236.24		11,463
Ŧ	01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,413
,	01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,352
	01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699
-	01/01/98	105	United Security	Utilities	Alarm	30.00		11,383
-	01/01/98	107	Edison General	Utilities	January Electric	115.55		11,124
	01/01/98	108	City Services	Utilities	Water	54.39		11,069
	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739
	01/02/98		DEPOSIT	DEPOSIT			5,985.82	15,059
	01/05/98	114	Poly Payroll Servie	Payroll		1,817.32		13,071

To fix this problem click anywhere in the Check column and choose **Sort Up Within** (see "<u>Sorting By Two or</u> <u>More Fields</u>" on page 20).

View	Fields	Text	Search	Sort	Math	Setup	Wizards		ê 9	<b>I</b> ()
	0			Sort	t Up Che	ckbook	æυ			
٠	Date	Checl P	'ay To	Sort	t Up Wit	hin 🕟		Debit	Credit	Bala 🔺
	01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98	101 B 111 G 112 H 100 S 106 U 103 A 104 S 110 V		Sort Gro	Down Down V up Up up Dow up	Within	nce group XI mance policy op policy 81 Phone Serve	1,580.00 975.00 187.50 92.00 14.20 144.02 236.24 50.00 136.95 49.90		9,489 11,749 9,165 9,073 12,724 11,239 11,463 11,413 9,352 11,699
	01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/02/98 01/05/98	105 U 107 E 108 C	Inited Security dison General ty Services PENING BALAN PEPOSIT Voly Payroll Ser	Gro	t by Colo up by C line Lev	olor	tr io	30.00 115.55 54.39 1,817.32	12,739.00 5,985.82	11,383 11,124 11,069

Now all of the data is back to its original order.

00			INIY CI	neckbook			
Date	Checl	Pay To	Category	Memo	Debit	Credit	Ba
01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,73
01/01/98	100	Sparkletts	Office Supplies		14.20		12,72
01/01/98	101	Blue Cross	Insurance	Health Insurance group XE	975.00		11,74
01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,69
01/01/98	103	AT&T	Telecom	Long Distance Phone Serv	236.24		11,46
01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,41
01/01/98	105	United Security	Utilities	Alarm	30.00		11,38
01/01/98	106	UPS	Shipping		144.02		11,23
01/01/98	107	Edison General	Utilities	January Electric	115.55		11,12
01/01/98	108	City Services	Utilities	Water	54.39		11,06
01/01/98	109	Pacific Properties	Rent	January Rent	1,580.00		9,48
01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,35
01/01/98	111	General Casualty	Insurance	Property Insurance policy	187.50		9,16
01/01/98	112	Hamilton Davis	Insurance	Worker's Comp policy 81	92.00		9,07
01/02/98		DEPOSIT	DEPOSIT			5,985.82	15,05
01/05/98	113	Office Max	Office Supplies		170.47	ŕ	14,88
01/05/98	114	Poly Payroll Serviv			1,817.32		13,07
01/05/98		Oregon National Enc		Invoice 35661	186.36		12,88
01/05/98		Kinko's	Office Supplies		50.03		12,83
01/05/98	117	Boston Direct	Purchases	Invoice 57540	185.96		12,64
01/05/98		Precision Plastics	Purchases	Invoice 60632	459.86		12,18
01/05/98		Tech Media	Purchases	Invoice 48536	336.67		11,85
01/05/98		Miller Industries	Purchases	Invoice 90513	361.90		11,49
01/05/98		Cool Creek Studiio	Advertising		1,114.85		10,37
01/05/98		Anderson Manufact		Invoice 17730	627.98		9,74
01/09/98		DEPOSIT	DEPOSIT			3,772.42	
01/12/98	123	Poly Payroll Servi	Pavroll		1,833.80	-,	11,68
01/12/98		Anderson Manufact		Invoice 79066	551.22		11,13
01/12/98	125	Clark Supply	Purchases	Invoice 91494	387.15		10,74
01/16/98		DEPOSIT	DEPOSIT			3,110.56	
01/19/98	126	Tech Media	Purchases	Invoice 77138	350.01	-,	13,50
01/19/98	127	Poly Payroll Servi	Pavroll		1,874.76		11,63
01/19/98	128	Airborne	Shipping	Invoice 16582	63.61		11,57
01/19/98		Clark Supply	Purchases	Invoice 13589	160.71		11,40
01/19/98		FedEx	Shipping	Invoice 75951	160.97		11,24
01/19/98		Staples	Office Supplies		126.83		11.12
515 visit			0				

With a little bit of advance preparation you can make it much simpler to restore the original database order after grouping summary records (assuming that you care what order the records are in — in many cases you won't. One technique would be to **Save** the database just before using the Group command, and then use the **Revert to Saved** command when you are done (see "<u>Revert to Saved</u>" on page 87). Another technique would be to create an extra field and fill the field with a numeric sequence (1, 2, 3, etc.) using the **Sequence** command (see "<u>Automatic Numbering</u>" on page 442). After you remove the summaries you can simply sort by this numeric field to restore the original order.

### **Automating Tasks with Procedures**

Right out of the box, Panorama is a very flexible program. Its built in menus and tools bring incredible power to your fingertips. Even better, you can easily create your own commands that can be activated with a menu or button. You can create these commands (called procedures) using Panorama's built in programming language or simply by recording each step with the built in recorder. To start recording a procedure just click on the **Record Procedure** tool. The wheels of the recorder will start to spin to let you know that Panorama is recording your actions (see "<u>Creating a Procedure with the Recorder</u>" on page 1346).

0	0			My (	Checkbook				
			Pay To	Category	Memo	Debit	Credit	Balance	4
29	Record Pro	ocedu	ITE NG BALANCE	DEPOSIT			12,739.00	12,739.00	1
¥	01/01/98	100	Sparkletts	Office Supplies		14.20	·	12,724.80	ſ
	01/01/98	101	Blue Cross	Insurance	Health Insurance group XBG-	975.00		11,749.80	-
æ	01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.90	

Your job is to create procedures that automate the summary process you just learned. With the recorder running (make sure the reels are spinning) perform the following steps (the same steps you just performed, see "<u>Calculating Subtotals</u>" on page 97).

Step	Action
1	Click on the Date field.
2	Choose Group Up from the Sort menu.
3	Choose the Month option.
4	Click on the Group button.
5	Click on the Category field.
6	Choose Group Up from the Sort menu.
7	Click on the Debit field.
8	Choose Total from the Math menu.
9	Choose Outline Level from the Sort menu.
10	Click on the <mark>2</mark> button.

When you've finished with these steps press the **Record Procedure** tool again. This stops the recording.

Date	Checl Pay To	Category	Memo	Debit	Credit	Balance	4
Record	Procedure			17,202.48			7
	98			19,773.29			
03/30/				21,908.19			C
03/30/	98			17,708.77			ľ
05/29/	98			20,072.21			
/ /	98			18,958.28			
07/31/	98			15,803.58			l
08/31/	98			21,410.34			
09/28/				16,210.08			
10/30/				17,991.62			
09/28/ 10/30/ 11/30/ 12/28/				20,584.69			
12/28/	98			18,053.95			
<b>.</b>				225,677.47			
							4
							•

After you stop the recorder a dialog box will appear. Type in the name of the new procedure (in this case Month & Category Totals) and press the **Save Procedure** button.

	Save Recording
New pro	ocedure name
Month	& Category Totals
	Cancel Save Procedure

Next you'll create another procedure to remove the summaries and restore the original order of the data (see "<u>Removing Summary Records</u>" on page 108). Start by turning the recorder back on again.

0	00		М	y Checkbook				
•	Date	Checl Pay To	Category	Memo	Debit	Credit	Balance	
22	<b>Record Pr</b>	ocedure			17,202.48			1
کمو	02/27/98				19,773.29			0
<u>~</u> ~	03/30/98				21,908.19			

With the recorder running perform the following steps.

Step	Action
1	Choose <b>Remove Summaries</b> from the Sort menu.
2	Click on the <b>Remove ALL Summaries</b> button.
3	Click on the Date field.
4	Choose Sort Up from the Sort menu.
5	Click on the Check field.
6	Choose Sort Up Within from the Sort menu.

When you've finished with these steps press the Record Procedure tool again to stop the recording.

0	0			My	Checkbook				
•	Date	Checl Pay		Category	Memo	Debit	Credit	Balance	4
28	Record Pr	ocedure	Creek Studiio	Advertising		1,114.85		10,375.66	1
3°	01/05/98		derson Manufact		Invoice 17730	627.98		9,747.68	
8	01/12/98	123 Po	y Payroll Servi	Payroll		1 ,833.80		11,686.30	

Panorama will ask you to give this procedure a name of its own.

Save Recording
New procedure name
Restore Original Data
Cancel Save Procedure

Before you go any further you should Save your database with the new procedures you just created.

# **Using the Action Menu**

If you look closely you'll see that a new menu has appeared — the **Action** menu. This menu contains the two procedures you just recorded.

View	Fields	5 Text	Search	Sort	Math	Setup	Action	Wizards	<u>9</u>	<b>●</b> )
0				My C	heckboo	k	Month	& Category	/ Totals	
Date	Checl	Pay To	Categor	ry 🛛	Memo	-	Restor	re Original [	Data	
01/05/98			tudiio Advert		1 477	70		4.85	10,375.66	2

When you choose a command from this menu it replays the steps that were recorded in the procedure. Choose the **Month & Category Totals** command now. Panorama replays the 10 steps in this procedure as fast as it can — zip zip zip.

Date	Check	Pay To	Category	Memo	Debit	Credit	Balance
<ul> <li>01/30/98</li> <li>02/27/98</li> <li>03/30/98</li> <li>04/27/98</li> </ul>	:				17,202.48		
02/27/98     02/27     02/	:				19,773.29		
03/30/98	:				21,908.19		
4/27/98	:				17,708.77		
05/29/98	:				20,072.21		
6/29/98	:				18,958.28		
	:				15,803.58		
08/31/98	:				21,410.34		
09/28/98	:				16,210.08		
10/30/98	:				17,991.62		
11/30/98	:				20,584.69		
12/28/98	:				18,053.95		
09/28/98 10/30/98 11/30/98 12/28/98					225,677.47		

Now choose the **Restore Original Data** command to quickly remove the summary records and restore the original data order.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance
01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739.00
01/01/98	100	Sparkletts	Office Supplies		14.20		12,724.80
	101	Blue Cross	Insurance	Health Insurance group XBG-	975.00		11,749.80
01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.90
01/01/98	103	AT&T	Telecom	Long Distance Phone Service	236.24		11,463.66
01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,413.66
01/01/98	105	United Security	Utilities	Alarm	30.00		11,383.66
01/01/98	106	UPS	Shipping		144.02		11,239.65
01/01/98	107	Edison General	Utilities	January Electric	115.55		11,124.10
01/01/98	108	City Services	Utilities	Water	54.39		11,069.71
01/01/98	109	Pacific Properties	Rent	January Rent	1 ,580.00		9,489.71
01/01/98	110	Valley Bell	Telecom	Local Phone Service	136.95		9,352.76
01/01/98	111	General Casualty	Insurance	Property Insurance policy Y	187.50		9,165.26
01/01/98	112	Hamilton Davis	Insurance	Worker's Comp policy 8172	92.00		9,073.26
01/02/98		DEPOSIT	DEPOSIT			5,985.82	15,059.08

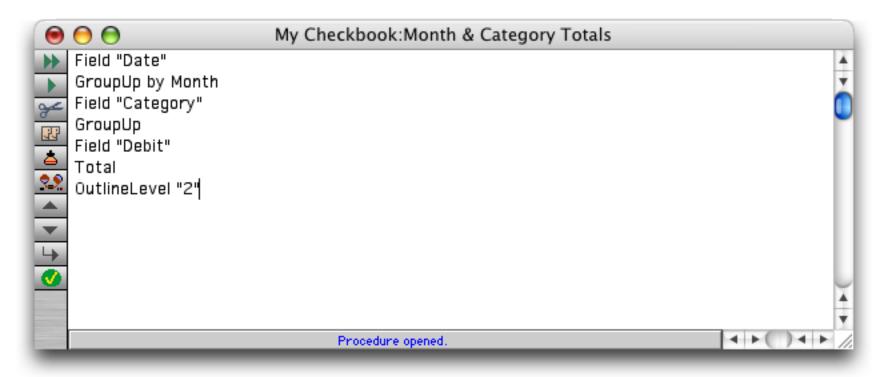
To learn more about the Action menu see "The Action Menu" on page 1478.

# **Editing a Procedure**

To see what is inside a procedure open the procedure with the **View** Menu.

le	Edit	View	Fields	Text	Search	Sort	Math	Setup	Action	Wizar	ds	91
	00	Data	Sheet			Check	oook					
•	Date	Desi	gn Sheet	:		Memo		-	Debit	Credit	Balance	*
<b>?</b> %	01/0	Flas	h Art Scr	apbool	CEPOSIT					12,739.00	12,739.00	1
4	01/0	Main	Form	s		s.			14.20		12,724.80	
-	01/0	New	FOITH			Health I	nsurance gi	roup XBG-	975.00		11,749.80	~
33	01/0	New	Crossta	b		Heating			49.90		11,699.90	
	01/0	00 17	TZ ATST			Long Dis	stance Phor	ne Service	236.24		11,463.66	
▲	01/0	New	Procedu	Ire		DSL			50.00		11,413.66	
	01/0	M	onth & C	aterior	y Totals	Alarm			30.00		11,383.66	
4	01/0	IVI	onun a c	ategoi	y rotars	<b>-</b>			144.02		11,239.65	
_	01/0	R	estore O	riginal	Data	January	/ Electric		115.55		11,124.10	
	01/0	20 10	a City Serv	rices	Utilities	Water			54.39		11,069.71	
	01/01/	98 10	9 Pacific Pi	roperties	Rent	January	/ Rent		1,580.00		9,489.71	

The window switches from the Data Sheet to show the procedure. Each command you recorded appears in a simple English-like format.



Panorama has hundreds of commands that can be used in a procedure — in fact, it has a complete programming language. The fundamentals of this programming language are described starting with "<u>Introduction</u> to (Panorama) Programming" on page 1337. When you used the Month & Category Totals procedure you may have noticed that the screen flashed over and over again as the commands were performed. By editing the procedure to add two new commands you can eliminate the extra unnecessary flashing. Edit the procedure to add the two new commands shown in the illustration below.

	My Checkbook:Month & Category Totals	
noshow		A
Field "Date"		Ŧ
GroupUp by Month		
Field "Category"		-
GroupUp		
GroupUp by Month Field "Category" GroupUp Field "Debit" Total		
Total		
endnoshow		
OutlineLevel "2"		
<u>_</u>		
1000		*
1000		<b>T</b>
	Procedure OK.	

To try out the revised procedure you'll need to use the View menu to switch back to the Data Sheet.

File	Edit	View	Search	Mark	Commands	Fields	Functions	Setup	Debug	Wizards
	nosh Field	Data Desi Flas <i>New</i>	gn Sheet gn Sheet Art Scra <i>Form</i>	pbook			ory Totals	Jetup	Debug	inizar us
	Outli	New M	<i>Crosstab</i> <i>Procedur</i> onth & Ca estore Ori	re ategory						

To try out your revised procedure choose it from the Action menu.

ile	Edit	View	Fields Text	Search	Sort	Math	Setup	Action	Wizards	91
	) 🖯 🤇	)		My	Check	book		Month	& Catego	ory Totals
4	Date	Chec	l Pay To	Category	Memo		_	Restor	e Origina	Data
	8 01 /01 ≤ 01 /01		OPENING BALANCE Sparkletts	DEPOSIT Office Supplies				1 14.20		,739.00 ,724.80

You'll notice that the procedure now runs with a minimum of extra flashing. (Actually, on a fast machine it may be a bit difficult to tell the difference for a procedure as short as this, but it can make a big difference with a slower machine or a longer procedure.)

Before moving on to the next step in the tutorial you choose the **Restore Original Data** command and then the **Save** command in the File menu to save the revised procedure.

# Analyzing Data with a Crosstab

In addition to the **Group** command Panorama has another powerful tool for summarizing data — **crosstabs**. For your next trick you'll create a crosstab table that displays spending by category vs. month. To create a new crosstab view you'll use the **View** menu. If you are using a Windows PC hold down the **Alt** key, if you are using a Macintosh hold down the **Control** key. Either way, select **New Crosstab** from the View menu.

le	Edit	View	Fields	Text	Search	Sort	Math	Setup	Action	Wizar	ds 🦉	) [
		Data	a Sheet		Ms	Check	book					
Þ		Desi	ign Sheet	t		Memo			Debit	Credit	Balance	Ă.
23		Flas	h Art Scr	apbook					1,114.85		10,375.66	2
Y	01/0	New	Form			Invoice	17730		627.98	3,772.42	9,747.68 13,520.10	
33	01/1:	New	Crossta	b	N N				1,833.80	5,((2.42	11,686.30	
4	01/1		Procedu		*		79066		551.22		11,135.09	
₽	01/1://				Purchases	Invoice	91494		387.15		10,747.94	
		M	lonth & C	ategor	y Totals	In contract of the second	77138		750.01	3,110.56		
<u></u>	01/1	R	estore Or	riginal [	Data	Invoice	((158		350.01 1,874.76		13,508.50	
	01/15				ompping	Invoice	16582		63.61		11,570.12	
	01/19/		29 Clark Sup		Purchases	Invoice			160.71		11,409.41	

Type in the name of the new crosstab, in this case Monthly Spending, and then press the OK button.

Create	New Crosstab
New crosstab name:	Insert before:
Monthly Spending	•
	Cancel OK

Panorama will create the new crosstab window, and then immediately open the **Crosstab** dialog. This dialog contains a list of the database fields on the left hand side. On the right hand side is a list of fields in the crosstab and a diagram of the crosstab layout (both empty to start).

	Crosstab Design	
Database Fields Date Check Pay To Category Memo Debit Credit Balance	Crosstab Fields          »Copy»         Remove         Date Formatting         Period:       Day	
	Pattern: Crosstab Preview Total Count Cancel OK	— diagram of crosstab layout

To tell Panorama to list months across the top of the crosstab click on Date and then press the **»Copy»** button (or double click on Date).

	Crosstab Design
Database Fields Date Check Pay To Category Memo Debit Credit Balance	Crosstab Fields          »Copy»       Date         Remove       Date Formatting         Period:       Day         Pattern:       Pattern:         Crosstab Preview       Date         Date       Other         Other       Other         Date       Other         Other       O
	Cancel OK

To separate the crosstab into one month per column use the pop-up menu to switch from Day to Month.

	Crosstab Design		
Database Fields Date Check Pay To Category Memo	<b>»Copy»</b> (Remove)	Crosstab Field: Date	S
Debit		– Date Formati	ting
Credit Balance		Period: Pattern:	Day Week Month
	Crosstab Prev	riew Date	Quarter Year
		Cancel	O Total O Count

Page 119

Next you need to specify the field that will appear down the left hand side of the crosstab table. Click on Category and then press the **»Copy**» button (or double click on Category).

	Crosstab Design
Database Fields Date Check Pay To Category	Crosstab Fields Copy> Date Category
Memo Debit Credit Balance	Date Formatting Period: Month Pattern: Mon yy Crosstab Preview
	Category Date
	Cancel OK

Next you must specify what goes in the middle of the crosstab table. Click on Debit and then press the **»Copy»** button (or double click on Debit).

	Crosstab Design
Database Fields	Crosstab Fields
Date	Scopy» Date
Check	Category Remove Debit
Pay To	Debit
Category	
Memo	
Debit	Date Formatting
Credit	Period: Month
Balance	
	Pattern: Mon yy
	Crosstab Preview
	Date
	Category Debit
	O Total O Count

Finally, click the Total radio button so that the crosstab will add up the checks instead of counting them.

Crosstab Prev	iew	_
	Date	
Category	Debit	
	Total Count	

Press the **OK** button. Panorama will think for a few seconds, then the crosstab table will appear in a new window slightly below and to the right of the data sheet window (see "<u>Opening More Than One Window Per</u> <u>Database</u>" on page 189). The crosstab table displays a summary of the information in the database, showing categories down the left hand side and months across the top (see "<u>Crosstabs</u>" on page 411).

	) 🕤 My Ch	My Check eckbook:XTA		pending		
	×tab	Jan 98	Feb 98	Mar 98	Apr 98	May
	Advertising	1,114.85	3,874.92	2,202.67	2,631.00	2,396
	DEPOSIT	0.00	0.00	0.00	0.00	0
	Fixed Assets		1,974.81	1,363.94	727.11	2,828
	Insurance	1,254.50	1,254.50	1,254.50	1,254.50	1,254
	Legal				282.44	
	Office Supplies	614.01	938.45	1,043.33	752.83	321
→ F	Payroll	7,319.30	6,966.12	9,123.23	6,726.87	7,172
<u></u>	Purchases	4,106.41	2,135.08	3,447.93	1,961.64	2,380
<b>⊼</b> ≣ I	Rent	1,580.00	1,580.00	1,580.00	1,580.00	1,580
	Shipping	540.39	298.76	1,228.69	1,106.24	1,486
	Telecom	423.19	514.61	454.94	451.65	417
	13 visible/13 total 🛛 🗐 🔺 🕨 🤇	•				)++

Just as with the Data Sheet you can adjust the text size and column widths of the crosstab table (see "<u>Adjust-ing Column Widths, Font and Size</u>" on page 16).

×tab	Jan 98	Feb 98	Mar 98	Apr 98	May 98	Jun 98	Jul 98	
Advertising	1,114.85	3,874.92	2,202.67	2,631.00	2,396.43	2,653.66	1,198.08	Î
DEPOSIT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Fixed Assets		1,974.81	1,363.94	727.11	2,828.50			
Insurance	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	
Legal				282.44				
Office Supplies	614.01	938.45	1,043.33	752.83	321.54	481.47	690.04	
Payroll	7,319.30	6,966.12	9,123.23	6,726.87	7,172.42	8,966.83	6,956.52	
Purchases	4,106.41	2,135.08	3,447.93	1,961.64	2,380.31	2,567.58	2,264.56	
Rent	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	
Shipping	540.39	298.76	1,228.69	1,106.24	1,486.10	835.82	1,136.65	
Telecom Utilities TOT AL	423.19	514.61	454.94	451.65	417.80	402.95	530.83	
Utilities	249.84	236.05	208.95	234.49	234.61	215.48	192.41	
TOTAL	17,202.48	19,773.29	21,908.19	17,708.77	20,072.21	18,958.28	15,803.58	1

You can split the window into two separate panes by dragging the **splitter** to the right. The **splitter** is the small black rectangle to the left of the horizontal scroll bar (see "<u>Splitting a Window</u>" on page 165).

🖉 ×tab	Jan 98	Feb 98	Mar 98	Apr 98	May 98	Jun 98	Jul 98	
Advertising	1,114.85	3,874.92	2,202.67	2,631.00	2,396.43	2,653.66	1,198.08	
DEPOSIT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		1,974.81	1,363.94	727.11	2,828.50			
Insurance	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	
Legal				282.44				
Office Supplies	614.01	938.45	1,043.33	752.83	321.54	481.47	690.04	
Payroll	7,319.30	6,966.12	9,123.23	6,726.87	7,172.42	8,966.83	6,956.52	
Purchases	4,106.41	2,135.08	3,447.93	1,961.64	2,380.31	2,567.58	2,264.56	
	1 ,580.00	1 ,580.00	1 ,580.00	1,580.00	1 ,580.00	1 ,580.00	1 ,580.00	
Shipping	540.39	298.76	1 ,228.69	1,106.24	1,486.10	835.82	1,136.65	
E Telecom	423.19	514.61	454.94	451.65	417.80	402.95	530.83	
Utilities	249.84	236.05	208.95	234.49	234.61	215.48	192.41	
TOTAL	17,202.48	19,773.29	21,908.19	17,708.77	20,072.21	18,958.28	15,803.58	2
Telecom Utilities TOTAL								
				8				

Once the window has been split in two you can horizontally scroll each pane separately. If you scroll all the way to the right you will see the overall totals for each category.

			totais	for each cate			
) 🖯 🖯	My	/ Checkboo	ok:XTABS:N	lonthly Spe	nding		
1 ×tab	Jan 98	Feb 98	Mar 98	Oct 98	Nov 98	Dec 98	TOT AL
Advertising	1,114.85	3,874.92	2,202.67	3,416.08	2,607.82	2,528.52	30,011.38
DEPOSIT	0.00	0.00	0.00	0.00	0.00	0,00	0.00
Fixed Assets		1,974.81	1,363.94			1,063.90	10,222.66
Insurance	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	15,054.00
P Legal	·	·		410.02	1,015.09	·	2,893.63
	614.01	938.45	1,043.33	792.24	415.42	349.14	7,425.49
Payroll	7,319.30	6,966.12	9,123.23	7,293.66	9,189.31	7,021.2	92,219.14
Purchases	4,106.41	2,135.08	3,447.93	1,881.39	2,930.92	2,501.53	29,666.43
- Ront	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	18,960.00
Shipping	540.39	298.76	1,228.69	722.99	938.68	1,084.98	11,183.63
E Telecom	423.19	514.61	454.94	445.13	468.80	449,00	5,450.39
Utilities	249.84	236.05	208.95	195.59	184.14	221.17	2,590.70
TOTAL	17,202.48	19,773.29	21,908.19	17,991.62	20,584.69	18,053.95	225,677.4
Telecom Utilities TOTAL							
13 visible/13	total		) 4 1			<u> </u>	

To learn more about crosstabs see "<u>Crosstabs</u>" on page 411.

# Auditing the Crosstab Table

As you examine a crosstab you may find that you need to check out the backup detail behind a certain number. Doing this is easy—just click on the number and then click the **Select Original Data** tool. For example, suppose you want to see the individual checks written for purchases in November of 1998. Simply click on the Nov 98 Purchases cell and click on the tool.

	4	Balance	Credit	Debit		Memo	Category	cl Pay To	Checl	Date
	1	12,739.00	12,739.00				DEPOSIT	OPENING BALANCE		1/01/98
1		12,724.80		14.20			Office Supplies	0 Sparkletts	100	01/98
1	۲	11,749.80		975.00	ance group XBG-	Health Insur	Insurance	1 Blue Cross		98
		11,699.90		49.90		Heating	Utilities	2 Valley Gas	102	98
		11,463.66		236.24	ce Phone Service	Long Distand	Telecom	3 AT&T	103	/98
		11,413.66		50.00		DSL	Telecom	4 Surf Networks	104	/98
		11,383.66		30.00		Alarm	Utilities	5 United Security	105	/98
		11,239.65		144.02			Shipping	6 UPS	106	/98
		11,124.10		115.55	otric	January Ele	Utilities	7 Edison General	107	1/98
		11,069.71		54.39		Water	Utilities	8 City Services	108	1/98
		9,489.71		1 ,580.00	nt	January Rer	Rent	9 Pacific Properties	109	/98
			nding	onthly Spei	ok:XTABS:Mo	Checkboo	My	00	0	/98 /98
то	98	Dec 9	Nov 98	Oct 98	Mar 98	Feb 98	Jan 98	×tab	₩.	98 98 -
30,01	52	2,528.5	2,607.82	3,416.08	2,202.67	3,874.92	1,114.85	Advertising	<u>ا (ا)</u>	-00
		· ·	0.00	0.00	0.00	0.00		Select Original		visi
10,22		1,063.9			1,363.94	1,974.81	Data	FIXED ASSELS	<u>~</u> N ·	
15,05			1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	Insurance	<u>م</u>	- 1
2,89		ŕ	1,015.09	410.02	ŕ	ŕ	ŕ	Legal	JU L	- 15
7,42	4	349.1	415.42	792.24	1,043.33	938.45	614.01	Office Supplies		11
92,21	21	7,021.2	9,1,9.31	7,293.66	9,123.23	6,966.12	7,319.30	Payroll	Å F	. 1
29,66	53	2,501.5	2,930.92	1 ,881.3	3,447.93	2,135.08	4,106.41	Purchases	H F	
18,96			1 ,580.00	1 ,580.00	1,580.00	1 ,580.00	1 ,580.00	Rent		10
11,18			938.68	722.99	1,228.69	298.76	540.39	Shipping	<b>₩</b> 8	11
5,45			468.80	445.13	454.94	514.61	423.19	Telecom	78 1	- 1
2,59			184.14	195.59	208.95	236.05	249.84	Utilities	1 S	11
225,67	95	18,053.9	20,584.69	17,991.62	21,908.19	19,773.29	17,202.48	TOTAL		11
									M	- 1

After you click on the tool the data sheet shows the detail for the crosstab cell you clicked on, in this case the nine checks made for purchase in November of 1998.

Date (	Checl	Pay To	Category	Merno		Debit	Credit	Balance	
11/09/98	501	Clark Supply	Purchases	Invoice 344	49	182.69		18,856.74	
11/09/98	502	Anderson Manufact	Purchases	Invoice 568	17	417.19		18,439.55	
11/09/98	506	Telon Productions	Purchases	Invoice 655	9	277.19		16,083.23	
	508	Miller Industries	Purchases	Invoice 854	86	125.37		21,224.25	
11/23/98	515	Miller Industries	Purchases	Invoice 893	12	387.50		19,362.53	
11/23/98	517	Clark Supply	Purchases	Invoice 243	43	302.72		18,996.02	
11/23/98	519	Stamford Mfg	Purchases	Invoice 110	89	366.13		16,778.81	
11/30/98	521	Anderson Manufact	Purchases	Invoice 382	34	646.73		20,159.40	
11/30/98	524	Coast General	Purchases	Invoice 198	39	225.40		19,375.48	
	•	) 🖯	My	Checkboo	ok:XTABS:M	lonthly Spei	nding		
(z	≱ ×	tab	Jan 98	Feb 98	Mar 98	Oct 98	Nov 98	Dec 98	т
9 visib	۸ ዾ	dvertising	1,114.85	3,874.92	2,202.67	3,416.08	2,607.82	2,528.52	30,01
						-,			- 30,01
6		EPOSIT	0.00	0.00	0.00	0.00	0.00		·
5	F	EPOSIT ixed Assets		0.00 1 ,974.81	0.00 1,363.94	· ·	0.00	0.00	10,22
<u>و</u> ج	F		0.00			· ·		0.00	10,22 15,05
<u>م</u> ج	F F F	ixed Assets nsurance egal	1,254.50	1 ,974.81 1 ,254.50	1,363.94 1,254.50	0.00 1,254.50 410.02	0.00 1,254.50 1,015.09	0.00 1,063.90 1,254.50	10,22 15,05 2,89
کو ج ت	F F L O	ixed Assets nsurance egal Iffice Supplies	1,254.50	1,974.81 1,254.50 938.45	1 ,363.94 1 ,254.50 1 ,043.33	0.00 1,254.50 410.02 792.24	0.00 1,254.50 1,015.09 415.42	0.00 1,063.90 1,254.50 349.14	10,22 15,05 2,89 7,42
<u>و</u> ج ل	F F C L O	ixed Assets nsurance egal Iffice Supplies ayroll	1,254.50 614.01 7,319.30	1,974.81 1,254.50 938.45 6,966.12	1,363.94 1,254.50 1,043.33 9,123.23	0.00 1,254.50 410.02 792.24 7,293.66	0.00 1,254.50 1,015.09 415.42 9,189.31	0.00 1,063.90 1,254.50 349.14 7,021.21	10,22 15,05 2,89 7,42 92,21
<u>و</u> ج ل	F F C L O	ixed Assets nsurance egal Iffice Supplies	1,254.50 614.01 7,319.30 4,106.41	1,974.81 1,254.50 938.45 6,966.12 2,135.08	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53	10,22 15,05 2,89 7,42 92,21 29,66
و ج لا لا	F F L O P R	ixed Assets nsurance egal Iffice Supplies Iayroll Iurchases Ient	1,254.50 614.01 7,319.30 4,106.41 1,580.00	1,974.81 1,254.50 938.45 6,966.12 2,135.08 1,580.00	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93 1,580.00	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39 1,580.00	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92 1,580.00	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53 1,580.00	10,22 15,05 2,89 7,42 92,21 29,66 18,96
و ج الا الا الا	F F L O P R S	ixed Assets nsurance egal Iffice Supplies ayroll urchases ent hipping	1,254.50 614.01 7,319.30 4,106.41 1,580.00 540.39	1,974.81 1,254.50 938.45 6,966.12 2,135.08 1,580.00 298.76	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93 1,580.00 1,228.69	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39 1,580.00 722.99	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92 1,580.00 938.68	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53 1,580.00 1,084.98	10,22 15,05 2,89 7,42 92,21 29,66 18,96 11,18
و ج الا الا ال	F Ir Lu P P R S R	ixed Assets hsurance egal ffice Supplies ayroll urchases ent hipping elecom	1,254.50 614.01 7,319.30 4,106.41 1,580.00	1,974.81 1,254.50 938.45 6,966.12 2,135.08 1,580.00 298.76 514.61	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93 1,580.00 1,228.69 454.94	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39 1,580.00 722.99 445.13	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92 1,580.00 938.68 468.80	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53 1,580.00 1,084.98 449.00	10,22 15,05 2,89 7,42 92,21 29,66 18,96 11,18 5,45
و ج الا الا ال الا الا الا الا الا الا ال	F In D P P R S T	ixed Assets hsurance egal iffice Supplies ayroll urchases tent hipping elecom tilities	1,254.50 614.01 7,319.30 4,106.41 1,580.00 540.39 423.19 249.84	1,974.81 1,254.50 938.45 6,966.12 2,135.08 1,580.00 298.76 514.61 236.05	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93 1,580.00 1,228.69 454.94 208.95	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39 1,580.00 722.99 445.13 195.59	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92 1,580.00 938.68 468.80 184.14	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53 1,580.00 1,084.98 449.00 221.17	10,22 15,05 2,89 7,42 92,21 29,66 18,96 11,18 5,45 2,59
و ج ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا ا		ixed Assets hsurance egal ffice Supplies ayroll urchases ent hipping elecom	1,254.50 614.01 7,319.30 4,106.41 1,580.00 540.39 423.19 249.84	1,974.81 1,254.50 938.45 6,966.12 2,135.08 1,580.00 298.76 514.61	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93 1,580.00 1,228.69 454.94 208.95	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39 1,580.00 722.99 445.13 195.59	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92 1,580.00 938.68 468.80 184.14	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53 1,580.00 1,084.98 449.00	10,22 15,05 2,89 7,42 92,21 29,66 18,96 11,18 5,45 2,59
و ج الا الا ال الا الا الا الا الا الا ال		ixed Assets hsurance egal iffice Supplies ayroll urchases tent hipping elecom tilities	1,254.50 614.01 7,319.30 4,106.41 1,580.00 540.39 423.19 249.84	1,974.81 1,254.50 938.45 6,966.12 2,135.08 1,580.00 298.76 514.61 236.05	1,363.94 1,254.50 1,043.33 9,123.23 3,447.93 1,580.00 1,228.69 454.94 208.95	0.00 1,254.50 410.02 792.24 7,293.66 1,881.39 1,580.00 722.99 445.13 195.59	0.00 1,254.50 1,015.09 415.42 9,189.31 2,930.92 1,580.00 938.68 468.80 184.14	0.00 1,063.90 1,254.50 349.14 7,021.21 2,501.53 1,580.00 1,084.98 449.00 221.17	10,22 15,05 2,89 7,42 92,21 29,66 18,96 11,18 5,45 2,59

You can use the **Select Original Data** tool with any cell in the crosstab. In this illustration it has been used to select all **Fixed Assets** regardless of month.

	Date	Chool	Pay To	Category	Memo		Debit	Credit	Balance	
	Date	Check	Гауто	Category	riento		Debit	Create	Datatice	21 - L
2	02/16/98	162	Century Equipment	Fixed Assets			1,974.81		14,417.04	4
2	03/23/98	211	Sun Computers	Fixed Assets			1,363.94		15,765.11	
	04/06/98	239	Matrix Office Furn	Fixed Assets			727.11		10,592.89 👔	
j	05/04/98	274	Sun Computers	Fixed Assets			1 ,223.27		14,137.63	
<u></u> ►	05/18/98	287	Century Equipment	Fixed Assets			1,055.48		13,727.62	
-	05/25/98	291	Sun Computers	Fixed Assets			549.75		14,626.05	
	08/17/98	401	Micro Discount War	Fixed Assets			1 ,076.67		16,802.99	
E.	08/24/98		Century Equipment				984.38		17,146.78	
-	09/21/98	440	Matrix Office Furn	Fixed Assets			203.35		21,235.48	
	12/21/98	554	Century Equipment	Fixed Assets			1,063.90		16,749.72	
			×tab	Jan 98	Feb 98	Mar 98	Oct 98	Nov 98	Dec 98	
			0	IVI	у Спесквоо	DK:XTAB2:M	fonthly Spe	naing		
	10 visit	_	Advertising	1,114.85	3,874.92	2,202.67	3,416.08	2,607.82		
		y		0.00	0.00	0.00	0.00	0.00	0.00	
			Fixed Assets	1 054 50	1,974.81	1,363.94	1 054 50	1 054 50	1,063.90	
			Insurance	1 ,254.50	1,254.50	1,254.50	1,254.50 410.02	1,254.50	1,254.50	
			Legal Office Over line	614.01	938.45	1,043.33	792.24	1,015.09	349.14	2; F 7;
			Office Supplies Payroll	614.01 7,319.30		9,123.23	7,293.66	415.42		
			rayron Purchases	4,106.41	6,966.12 2,135.08	3,447.93	1,881.39	2,930.92		
			Rent	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	
			Shipping	540.39	298.76	1,380.00	722.99	938.68	1,084.98	
		_	Smpping Telecom	423.19	514.61	454.94	445.13	468.80	449.00	
		_	Utilities	249.84	236.05	208.95	195.59	184.14	221.17	
			TOTAL		19,773.29		17,991.62			
			TOTAL	11,202.40	17,113.27	21,500.15	11,221.02	20,304.07	10,033.75	, 223
		<b>X</b>								
					0					
		and the second se	13 visible/13 to	tal 🛛 🔍 🏓						

If you click on one of the cells in the bottom line and use the **Select Original Data** tool Panorama will select an entire month of checks, in this case all 43 checks written in February of 1998.

Date	Checl	Pay To	Category	Memo		Debit	Credit	Balance 🔺	
02/02/98	137	City Services	Utilities	Water		48.99		17,974.06	1
02/02/98		Valley Gas	Utilities	Heating		47.99		17,926.07	
02/02/98		UPS	Shipping	ricating		57.08		17,868.98	1
02/02/98		Surf Networks	Telecom	DSL		50.00		17,818.98	1
02/02/98		AT&T	Telecom		e Phone Service			17,467.43	
02/02/98		United Security	Utilities	Alarm		30.00		17,437.43	
02/02/98		Hamilton Davis	Insurance		mp policy 8172			17,345.43	
02/02/98	144	General Casualty	Insurance		surance policy Y			17,157.93	
02/02/98		Valley Bell	Telecom	Local Phone		113.05		17,044.88	
02/02/98		Blue Cross	Insurance	Health Insur	ance group XBG-	975.00		16,069.88	
02/02/98	147	Champion Trucking	Shipping	Invoice 679		151.04		15,918.83	
02/02/98	0	) 🖯	Mv	Checkboo	k:XTABS:M	onthly Sper	ndina		
02/02/98	4.4						-		
02/02/98	(⊉ ⇒	<tab< td=""><td>Jan 98</td><td>Feb 98</td><td>Mar 98</td><td>Oct 98</td><td>Nov 98</td><td>Dec 98</td><td>TOT</td></tab<>	Jan 98	Feb 98	Mar 98	Oct 98	Nov 98	Dec 98	TOT
00.000.000		Advertising	1,114.85	3,874.92	2,202.67	3,416.08	2,607.82	2,528.52	30,011.
43 visit		DEPOSIT	0.00	0.00	0.00	0.00	0.00		0.
	5	Fixed Assets		1,974.81	1,363.94			1,063.90	10,222
		nsurance	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	· ·	15,054
		egal	Í Í	í.	ŕ	410.02	1,015.09		2,893
		Office Supplies	614.01	938.45	1,043.33	792.24	415.42		
	i 📥	Payroll	7,319.30	6,966.12	9,123.23	7,293.66	9,189.31	7,021.21	92,219.
	H F	Purchases	4,106.41	2,135.08	3,447.93	1,881.39	2,930.92	2,501.53	29,666.
		Rent	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	1,580.00	18,960.
	4	Shipping	540.39	298.76	1,228.69	722.99	938.68	1,084.98	11,183.
	<b>N</b>	Telecom	423.19	514.61	454.94	445.13	468.80	449.00	5,450.
	U	Jtilities	249.84	236.05	208.95	195.59	184.14	221.17	2,590.
		TOTAL	17,202.48	19,773.29	21,908.19	17,991.62	20,584.69	18,053.95	225,67
	<b>M</b>								

When you are done with the crosstab close the window and, if necessary, use **Select All** in the Search menu to make all the records in the data sheet visible again (see "<u>Selecting All Records</u>" on page 35). You can open the crosstab again later using the **View** menu. If the data has changed use the **Calculate Crosstab** tool to re-calculate the table values.

DEPOSIT         0.00	ŀ	×tab	Jan 98	Feb 98	Mar 98	Apr 98	May 98	Jun 98	Jul 98
DEPOSIT         0.00		Calculate Cross	Tab 14.85	3,874.92	2,202.67	2,631.00	2,396.43	2,653.66	1,198.08
Insurance         1,254.50	5	DEPOSIT	0.00	· ·	· ·				0.00
Legal         282.44           Office Supplies         614.01         938.45         1,043.33         752.83         321.54         481.47         690           Payroll         7,319.30         6,966.12         9,123.23         6,726.87         7,172.42         8,966.83         6,956           Purchases         4,106.41         2,135.08         3,447.93         1,961.64         2,380.31         2,567.58         2,264           Rent         1,580.00		Fixed Assets		1,974.81	1,363.94	727.11	2,828.50		
Office Supplies         614.01         938.45         1,043.33         752.83         321.54         481.47         690           Payroll         7,319.30         6,966.12         9,123.23         6,726.87         7,172.42         8,966.83         6,956           Purchases         4,106.41         2,135.08         3,447.93         1,961.64         2,380.31         2,567.58         2,264           Rent         1,580.00	•	Insurance	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50	1,254.50
Office Supplies         614.01         938.45         1,043.33         752.83         321.54         481.47         690           Payroll         7,319.30         6,966.12         9,123.23         6,726.87         7,172.42         8,966.83         6,956           Purchases         4,106.41         2,135.08         3,447.93         1,961.64         2,380.31         2,567.58         2,264           Rent         1,580.00		Legal	· ·	· ·	· ·	282.44			
Purchases         4,106.41         2,135.08         3,447.93         1,961.64         2,380.31         2,567.58         2,264           Rent         1,580.00	٩.	Office Supplies	614.01	938.45	1,043.33	752.83	321.54	481.47	690.04
Rent 1,580.00 1,580		Payroll	7,319.30	6,966.12	9,123.23	6,726.87	7,172.42	8,966.83	6,956.52
Shipping 540.39 298.76 1,228.69 1,106.24 1,486.10 835.82 1,136		Purchases	4,106.41	2,135.08	3,447.93	1,961.64	2,380.31	2,567.58	2,264.56
	9	Rent	1,580.00	1,580.00	1,580.00	1 ,580.00	1,580.00	1,580.00	1,580.00
Telecom         423.19         514.61         454.94         451.65         417.80         402.95         530           Utilities         249.84         236.05         208.95         234.49         234.61         215.48         192		Shipping	540.39	298.76	1,228.69	1,106.24	1,486.10	835.82	1,136.65
Utilities 249.84 236.05 208.95 234.49 234.61 215.48 192		Telecom	423.19	514.61	454.94	451.65	417.80	402.95	530.83
		Utilities	249.84	236.05	208.95	234.49	234.61	215.48	192.41
TOTAL 17,202.48 19,773.29 21,908.19 17,708.77 20,072.21 18,958.28 15,803.		TOTAL	17,202.48	19,773.29	21,908.19	17,708.77	20,072.21	18,958.28	15,803.58

To learn more about crosstabs see "<u>Crosstabs</u>" on page 411.

# Making a Bar Chart

Someone once said that a chart is worth a thousand numbers. Ok, that's not quite what they said, but let's create a chart anyway. Charts are usually displayed from summary records in the database (see "<u>Calculating</u> <u>Subtotals</u>" on page 97). These can be created with the **Group** and **Total** commands you learned about before. They can also be created with the **Summary & Outline Wizard**. To open this wizard choose **Summary & Outline Wizard** from the Utility submenu of the Wizard menu. The wizard contains eight pop-up menus that allow you to specify how to summarize the database.

01/01/98       OPENING BALANCE       DEPOSIT       12,739.00 </th <th></th> <th>Date</th> <th>Checl</th> <th>Pay To</th> <th>Category</th> <th>Memo</th> <th>Debit</th> <th>Credit</th> <th>Bala</th> <th>nce 🔺</th>		Date	Checl	Pay To	Category	Memo	Debit	Credit	Bala	nce 🔺
01/01/98       100       Sparkletts       Office Supplies         01/01/98       101       Blue Cross       Insurance       Health Insurance group XE       Image: State S	2	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739	.00 👗
01/01/98       101       Blue Cross       Insurance       Health Insurance group XE       Summary.My Checkboo         01/01/98       102       Valley Gas       Utilities       Heating         01/01/98       103       AT&T       Telecom       Long Distance Phone Service       Database TempLate         01/01/98       104       Surf Networks       Telecom       DSL       Group	4	01/01/98	100	Sparkletts	Office Supplies	(			10 704	00
01/01/98       103       AT&T       Telecom       Long Distance Phone Service         01/01/98       104       Surf Networks       Telecom       DSL       Group         01/01/98       105       United Security       Utilities       Alarm       Group       Group         01/01/98       106       UPS       Shipping       Group       Group       Group         01/01/98       107       Edison General       Utilities       January Electric       Group       Group         01/01/98       108       City Services       Utilities       Water       Total ▶         01/01/98       109       Pacific Properties       Rent       January Rent       Total ▶         01/01/98       110       Valley Bell       Telecom       Local Phone Service       Total ▶         01/01/98       111       General Casualty       Insurance       Property Insurance policy       Total ▶         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81       Outline Level         01/02/98       DEPOSIT       DEPOSIT       DEPOSIT       Outline Level       Outline Level		01/01/98	101	Blue Cross	Insurance	Health Insurance group XE	🖲 🖯 🖯 Su	mmary:M	ly Che	ckbool
01/01/98       103       AT&T       Telecom       Long Distance Phone Serv         01/01/98       104       Surf Networks       Telecom       DSL         01/01/98       105       United Security       Utilities       Alarm         01/01/98       106       UPS       Shipping       Group         01/01/98       107       Edison General       Utilities       January Electric         01/01/98       108       City Services       Utilities       Water         01/01/98       109       Pacific Properties       Rent       January Rent         01/01/98       109       Pacific Properties       Rent       January Rent         01/01/98       110       Valley Bell       Telecom       Local Phone Service       Total ▶         01/01/98       111       General Casualty       Insurance       Property Insurance policy       Total ▶         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81       Outline Level         01/02/98       DEPOSIT       DEPOSIT       Offer Common       Offer Common       Offer Common	i I	01/01/98	102	Valley Gas	Utilities	Heating	Database Tem	olate	-	
01/01/98       104       Surrivetworks       Telecom       DSL       Ordup         01/01/98       105       United Security       Utilities       Alarm         01/01/98       106       UPS       Shipping         01/01/98       107       Edison General       Utilities       January Electric         01/01/98       108       City Services       Utilities       Water         01/01/98       109       Pacific Properties       Rent       January Rent       Total ▶         01/01/98       110       Valley Bell       Telecom       Local Phone Service       Total ▶         01/01/98       111       General Casualty       Insurance       Property Insurance policy       Total ▶         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81'       Total ▶         01/02/98       DEPOSIT       DEPOSIT       DEPOSIT       Outline Level       Outline Level		01/01/98	103	AT&T	Telecom	Long Distance Phone Serv-	balabase rem	prace		
01/01/98       106       UPS       Shipping         01/01/98       107       Edison General       Utilities       January Electric         01/01/98       108       City Services       Utilities       Water         01/01/98       109       Pacific Properties       Rent       January Rent         01/01/98       109       Pacific Properties       Rent       January Rent         01/01/98       110       Valley Bell       Telecom       Local Phone Service         01/01/98       111       General Casualty       Insurance       Property Insurance policy         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81'         01/02/98       DEPOSIT       DEPOSIT       DEPOSIT       Outline Level		01/01/98	104	Surf Networks	Telecom	DSL	Group			
01/01/98       107       Edison General       Utilities       January Electric         01/01/98       108       City Services       Utilities       Water         01/01/98       109       Pacific Properties       Rent       January Rent         01/01/98       110       Valley Bell       Telecom       Local Phone Service       Total ▶         01/01/98       111       General Casualty       Insurance       Property Insurance policy       Total ▶         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81       Total ▶         01/02/98       DEPOSIT       DEPOSIT       OEPOSIT       Outline Level		01/01/98	105	United Security	Utilities	Alarm				
01/01/98       107       Edison General       Utilities       January Electric         01/01/98       108       City Services       Utilities       Water         01/01/98       109       Pacific Properties       Rent       January Rent       Total ▶         01/01/98       110       Valley Bell       Telecom       Local Phone Service       Total ▶         01/01/98       111       General Casualty       Insurance       Property Insurance policy       Total ▶         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81'       Total ▶         01/02/98       DEPOSIT       DEPOSIT       DEPOSIT       Outline Level		01/01/98	106	UPS	Shipping					
01/01/98       109       Pacific Properties       Rent       January Rent       Total ▶         01/01/98       110       Valley Bell       Telecom       Local Phone Service       Total ▶         01/01/98       111       General Casualty       Insurance       Property Insurance policy       Total ▶         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81'       Total ▶         01/02/98       DEPOSIT       DEPOSIT       DEPOSIT       Outline Level		01/01/98	107	Edison General	Utilities	January Electric				
01/01/98       110       Valley Bell       Telecom       Local Phone Service         01/01/98       111       General Casualty       Insurance       Property Insurance policy         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81'         01/02/98       DEPOSIT       DEPOSIT       OUTOR         01/05/00       447       00000       00000		01/01/98	108	City Services	Utilities	Water				
01/01/98       111       General Casualty       Insurance       Property Insurance policy         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81       Total ▶         01/02/98       DEPOSIT       DEPOSIT       Office 0       Office 0       Office 0		01/01/98	109	Pacific Properties	Rent	January Rent	Total 🕨			
01/01/98       111       General Casualty       Insurance       Property Insurance policy         01/01/98       112       Hamilton Davis       Insurance       Worker's Comp policy 81       Total ▶         01/02/98       DEPOSIT       DEPOSIT       DEPOSIT       Outline Level		01/01/98	110	Valley Bell	Telecom	Local Phone Service	Total 🕨			
01/01/98     112     Hamilton Davis     Insurance     Worker's Comp policy 81     Total >       01/02/98     DEPOSIT     DEPOSIT     Outline Level		01/01/98	111	General Casualty	Insurance	Property Insurance policy				
		01/01/98	112	Hamilton Davis	Insurance		Total 🕨			
		01/02/98		DEPOSIT	DEPOSIT		Outline Level			
515 VISIDIA /515 TOTAL LILIS AND REPORT FORTO L					000 0 <b>(</b> )		Descrit France			
		515 visib	le7515	total			Report Form			

We'll make a chart to display spending per month, so choose **Date (by Month)** from the first **Group** pop-up menu.

( 😑 😑 Sum	nmary:My Check	book
Database Temp	late	
Group Total ► Total ► Outline Level Report Form Summar ize	Date (by Day) Date (by Week) Date (by Month) Date (by Quarter) Date (by Year) Check Pay To Category Memo Debit Credit Balance	V Data

Page 127

Using the pop-up menus set the first Total option to Debit and the Outline Level to Date (by Month).

😝 🔵 🔘 Summary:My Checkbook Database Template					
Group	Date (by Month) 🛛 👻				
	<b></b>				
	<b></b>				
Total 🕨	Debit 👻				
Total 🕨	<b></b>				
Total 🕨	<b></b>				
Outline Level	Date (by Month) 🗾 👻				
Report Form	-				
Summar ize	Summarize/Print Raw Data				

When these three options are set up press the **Summarize** button. Panorama will group, total, and collapse the database just as if you had performed these operations manually (see "<u>Calculating Subtotals</u>" on page 97 and "<u>Hiding and Showing Detail</u>" on page 101). To learn more about this wizard see "<u>The Summaries & Outlines Wizard</u>" on page 401.

Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance
01/30/98					17,202.48		
02/27/98					19,773.29		
01/30/98 02/27/98 03/30/98 04/27/98					21,908.19		
04/27/98					17,708.77		
05/29/98					20,072.21		
06/29/98					18,958.28		
07/31/98					15,803.58		
08/31/98					21,410.34		
09/28/98					16,210.08		
10/30/98					17,991.62		
11/30/98					20,584.69		
12/28/98					18,053.95		
					225,677.47		

The next step in building a chart is to create a new form. If you are using a Windows PC hold down the **Alt** key, if you are using a Macintosh hold down the **Control** key. Either way, select **New Form** from the View menu (see "<u>Creating a New Form</u>" on page 465).



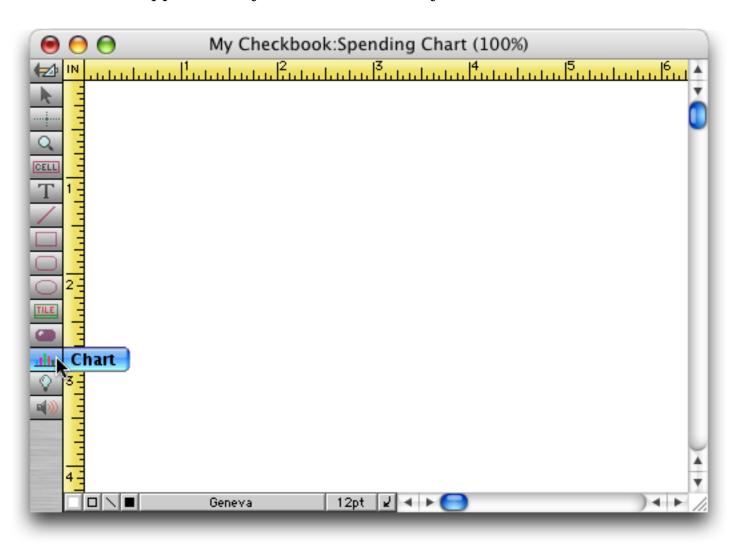
You know the drill by now — type in the name of the new form (up to 25 characters).

Create New Form				
New Form Name:	📃 Insert before:			
Spending Chart	•			
Cancel Blank Form	Quick Label Quick Report			

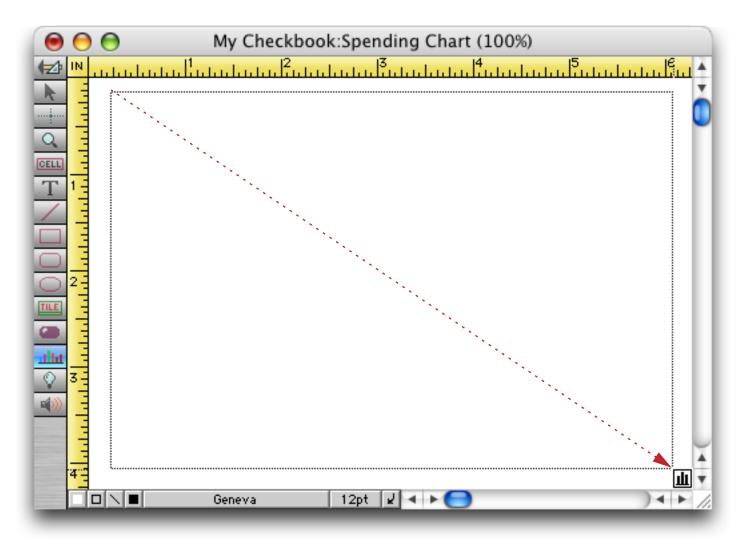
Press the **Blank Form** button to create the new form.

0.0	0	)	My Checkbook	_
0	0		ly Checkbook:Spending Chart (100%)	
• 🔁	IN	անտեսանունունունունունո	1	4
8 k	-			5
<b>R</b>	-			J
<u>a</u> Q	1			
HCELL	-			
4 T	1 -			
/	-			
	-			
	-			
0	2			2
TILE	-			A
	F	Geneva	12pt0.00" v0.00" &v0.00"	4
	111211111	□ <mark>\ ■</mark> Geneva	12pt x0.00" y0.00" ∆x0.00" ∆y0.00" 🖌 ◄ ► 🌅 ) ◀ ►	

Adjust the window size to approximately the size of the chart you want to make, then click on the Chart tool.



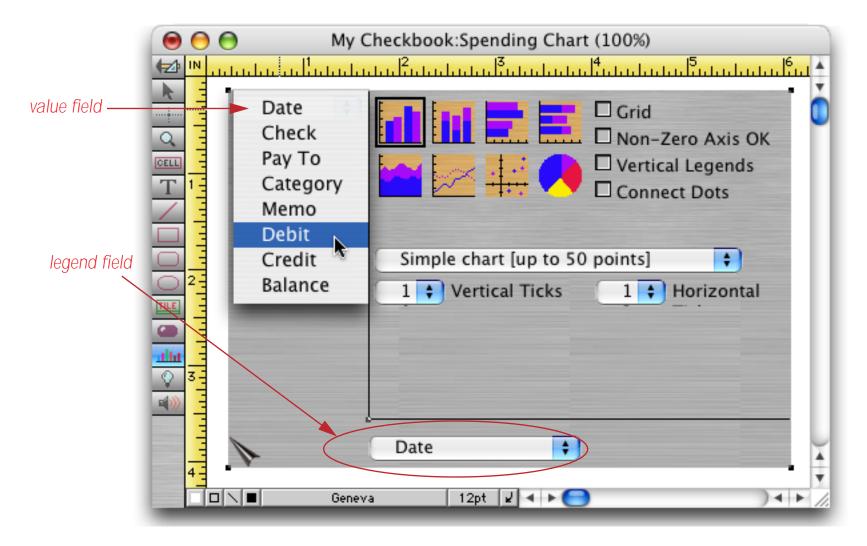
Move the mouse over the form and then drag from corner to corner to create the chart, just as you would to create a rectangle or a data cell.



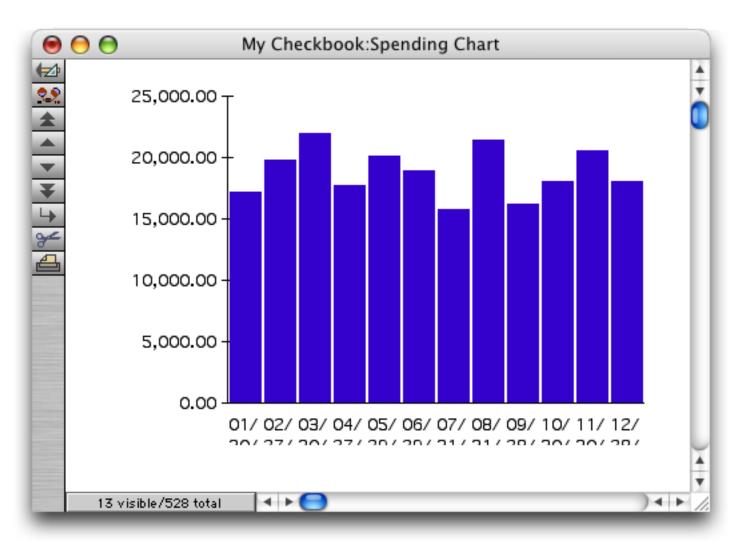
\varTheta 🔿 🕤 My (	Checkbook:Spending Chart (100%)
	Grid Grid Non-Zero Axis OK Vertical Legends Connect Dots
	Simple chart [up to 50 points]
	1 Vertical Ticks 1 + Horizontal
	Date 🗘
Genev	ra 12pt 🖌 ◀ ▶ 🕒 ) ◀ ▶ 💋

Your new chart doesn't look much like a chart yet, in fact it looks more like a dialog!

The buttons and pop-up menus in the dialog allow you to configure the chart. At a minimum, you must select a legend field and at least one value field (see "<u>Setting Up Legend and Value Fields</u>" on page 976). In this case the legend field is already set to Date. Use the pop-up menu to set the value field to Debit.



Switch to **Data Access Mode** to see the actual chart (see "<u>Form Modes: Data Access vs. Graphic Design</u>" on page 463).



# **Customizing the Chart Appearance**

Let's dress up the chart a little bit. To do that switch back to **Graphic Design Mode** (see "<u>Form Modes: Data</u> <u>Access vs. Graphic Design</u>" on page 463). Then click on the chart and change the font size to 9 point.

0 0 0	My Checkbool	k:Spending Chart	(100%)
	ունունունու  2	ևսես <mark>3</mark> սեսեսես	14 1
	Image: simple simpl	9 point 10	Grid Non-Zero Axis OK Vertical Legends Connect Dots
	Date	Up 郑[ Down 郑]	
	Geneva	Other	▼ )∢►//

Now select the **Output Pattern** command from the Text menu.

Te	ext	
	Font	•
	Size	•
~	Plain Text	ЖT
	Bold	≋В
	Italic	
	<u>Underline</u>	жU
	Qutiline	
	Shadow	
	Condense	
	Extended	
~	Left Justify	
	Center	
	Right	
	Full	
	<b>Output Pattern</b>	
	Build Formula	. ЖF 🤊

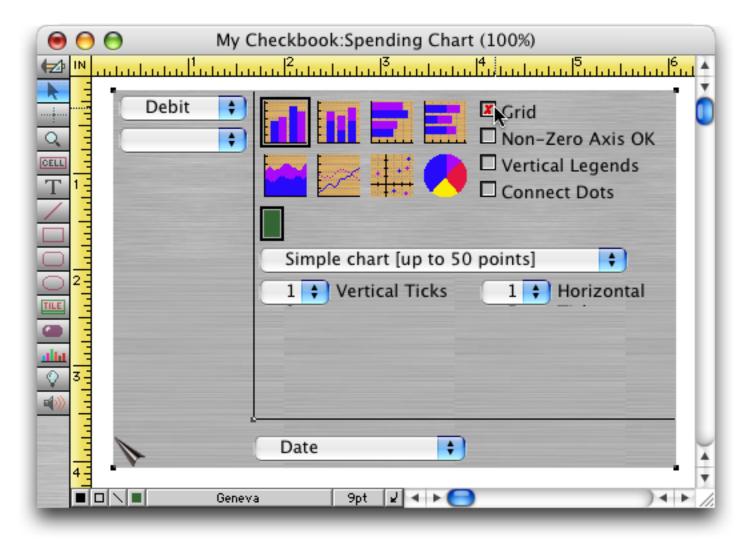
This command allows you to specify how the dates in the chart legend will be displayed. To display just the abbreviated month name (Jan, Feb, Mar, etc.) type in Mon (see "<u>Date Output Patterns</u>" on page 261).

	Data Cell	
Output	Pattern:	
Mon		
	Cancel OK	

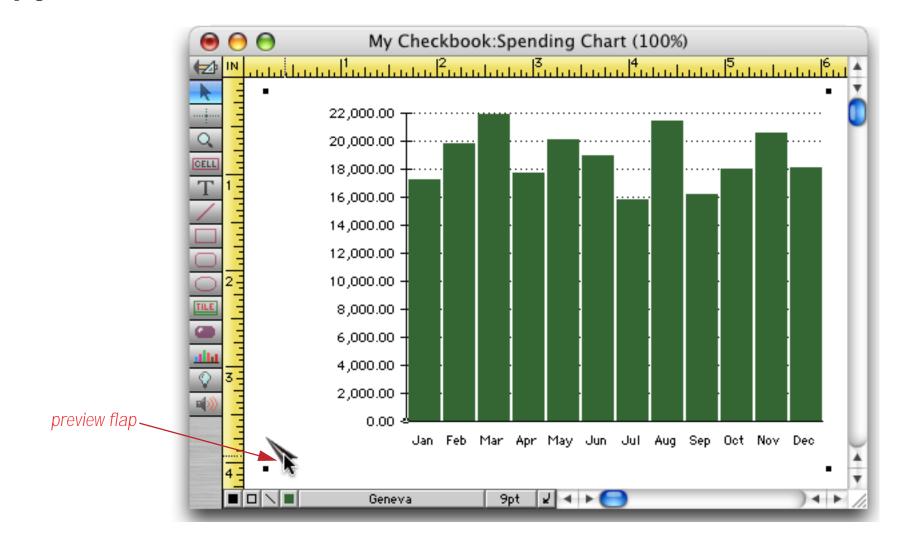
Use the color pop-up menu to select a different color for the chart bars (see "<u>Graphic Attribute Icons</u>" on page 995).

	1 + Vertical Ticks 1 + Horizontal	
		21
		A II
4- •		21
		1
🔳 🗆 🔪 📕 Gen	eva 🦳 9pt 🖌 🔺 🕨 🕞 👘 🔪 🔿 🔺 🕨	4

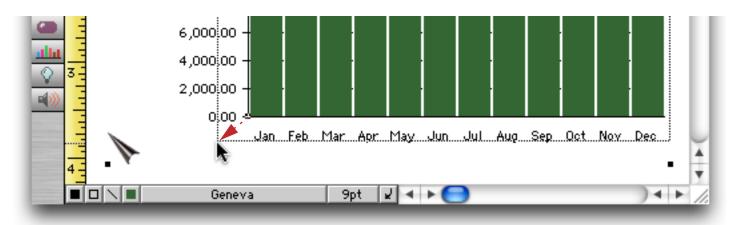
Click on the Grid option to display a dotted line from each tick mark.



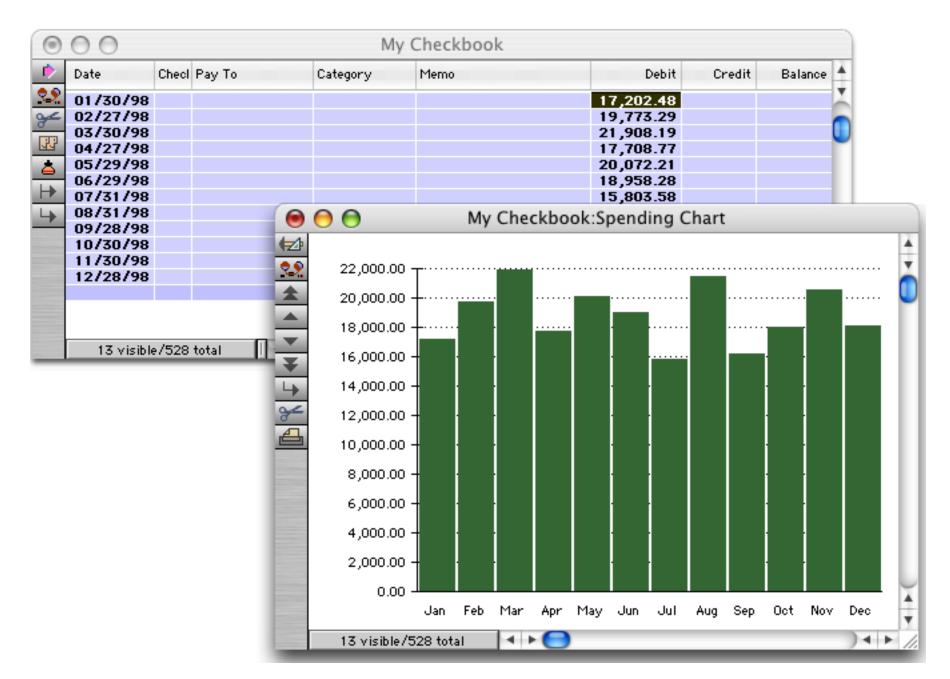
To preview the chart's appearance without going into Data Access Mode click on the **preview flap** in the lower left hand corner of the chart object. The preview flap is the small triangle that looks like a turned up page corner.



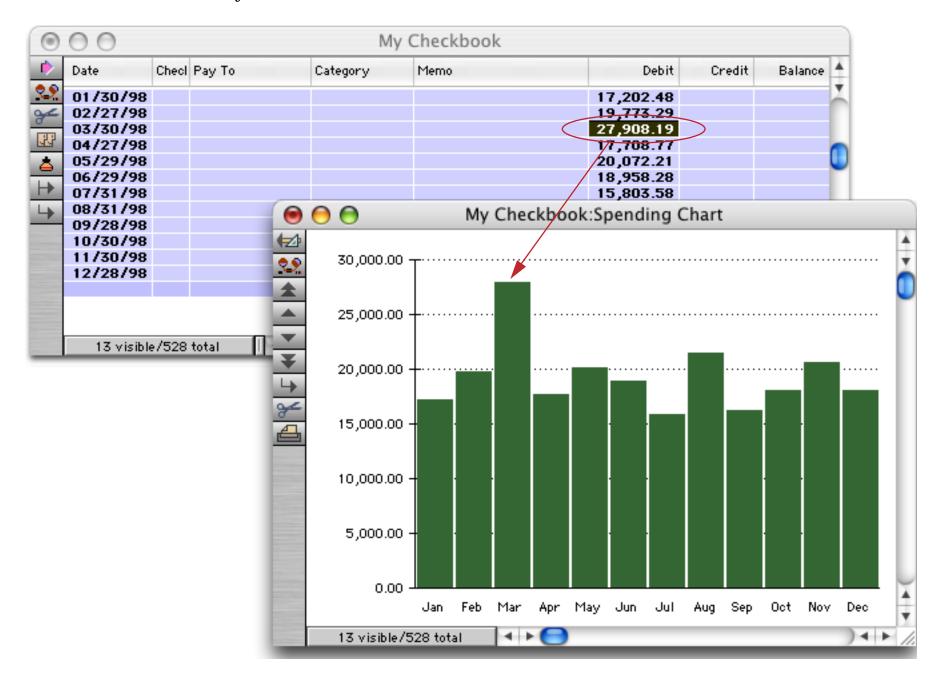
When in the preview mode you can use the extra fifth chart handle to adjust the margin where the chart legends appear.



When the form is switched to Data Access Mode the chart will immediately show any changes made to the database.



For example if you edit the summary value for March 1998 the chart will immediately update to reflect that change (of course it usually doesn't make any sense to edit a summary value like this). In the illustration shown below the summary value has been increased from 21908.19 to 27908.19.



We're finished with the chart, so close the window. Choose **Restore Original Data** from the Action menu, then **Save** the database. To learn more about charts see "<u>Charts</u>" on page 971.

Page 137

### **Data Entry Helpers**

Now let's switch gears. Before you can analyze data you have to get the data into the database, and that usually means data entry with the keyboard. This job is never easy, but Panorama does have tools that can make data entry faster and less error prone. The next few sections will look at how the data entry process can be improved for each of the fields in the checkbook database.

# Dates

The first field in the database contains the check date. You can modify the database to default to today's date when a new check is created. Start by clicking anywhere in the Date field and then choose the **Field Properties** dialog from the Setup menu (see "<u>Field Properties</u>" on page 216). (You can also open this dialog by double clicking on the field name at the top of the column.)

Ed	it View	Fi	elds	Text	Search	Sort	Math	Setup	Action	Wizard	s	Ģ	
0	0				My	y Cheo	ckbook	✓ Show	Record C	ount			
	Date 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98 01/01/98	100 101 102 103 104 105 106 107 108 109	Sparkle Blue Cr Valley AT&T Surf Ne United UPS Edison City Se Pacific Valley Genera	IG BALANCE etts ross Gas etworks Security General ervices Properties	Category	Mem Healt Heat Long DSL Alarn Wate Janu Loca Prop	th Insurance ing Distance PI m ary Electric r ary Rent I Phone Ser erty Insura	Field Add F Delet Instal Defau Regis	Record C Propertie Field e Field I Custom II Custom II Style & tration 136.95 187.50 92.00	Menus Color	9,35 9,16		
	01/02/98 515 visibl		DEPOSI		DEPOSIT		(cr 5 comp	ponoy 0112	470.47	5,985.82	· ·	9.08	•

The **Field Properties** dialog allows you to modify many of the attributes of each field. The **New Database Wizard** has already set up some of the options in this dialog, including the Field Name and the Type.

	Field Properties
_ Name & Data Type	e
Field Name	Date
Туре	Date 🗘 Digits 0 🛟
	Output Pattern
_ Data Entry Option	IS
Alignment	Left 🛟
Auto Capitalize	Off 🛟
Duplicates	Yes
Clairvoyance	Off 🗧
	Advanced Options
	Cancel OK

To set up the default value for this field press the **Advanced Options** button in the Data Entry Options area. The Advanced Data Entry options dialog has several radio buttons for different default values — click the Today's Date option.

ry Options	
_ Character Range	
💽 Any 💮	Custom
<ul> <li>Alphabetic</li> </ul>	A 🔺
O Numeric	В
AlphaNumeric	c n
	D D
	F
	G
	Ĥ
	1
	J
	К
	M
(Consel) (	
Cancel	ОК
	Any     Any     Alphabetic     Numeric

After you click this option press this **OK** button twice to get back to the data sheet. Then press the **Add New Record** tool (or select **Add New Record** from the Edit menu).

•	0 0			My	My Checkbook					
	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance		
2	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739.00		
2	01/01/98	100	Sparkletts	Office Supplies		14.20	·	12,724.80		
	01/01/98	101	Blue Cross	Insurance	Health Insurance group XBG-	975.00		11,749.80		
2	01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.90		
5	01/01/98	103	AT&T	Telecom	Long Distance Phone Service	236.24		11,463.66		
_	01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,413.66		
F.	01/01/98	105	United Security	Utilities	Alarm	30.00		11,383.66		
	Add New	Reco	rd	Shipping		144.02		11,239.65		
<b>1</b>	01701790		curson General	Utilities	January Electric	115.55		11,124.10		
1	01/01/98	108	City Services	Utilities	Water	54.39		11,069.71		
	01/01/98	109	Pacific Properties	Rent	January Rent	1,580.00		9,489.71		

The new check automatically defaults to today's date.

12/25/98		DEPOSIT	DEPOSIT		5,264.90	18,949.36
12/28/98	560	Valley Publications	Advertising	963.57		17,985.80
	561	Poly Payroll Servi	Payroll	1,749.38		16,236.42
09/26/04						
516 visible	7514	total 🛛 🖌 🕨				

#### **Smart Dates**

Panorama is very flexible about how you type dates. We call this feature "smart dates." You can enter dates numerically (for instance 04/09/02 or 4/9/2) or you can spell out the date (for instance April 9th, 1997 or Apr 9 97). You can use any character as a separator between numeric dates, for example 4-9-01 or even 4.9.01.

To enter today's date, simply type **today**. You can also enter **yesterday** or **tommorow**. Panorama will automatically convert these entries to the correct month, day and year.

If the date is in the current week, you can simply type in the name of the day, for example **saturday** or **tue**. To specify a day in the previous or upcoming weeks add the words last or next, for example **next tuesday** or **last saturday**.

Туре	Date Entered
today	10/26/00
may 17	05/17/00
yesterday	10/25/00
last friday	10/20/00
next wed	11/01/00

Play around with entering different dates, then use the **Cut Record** tool to delete the new record.

# **Check Number**

The second field contains the check number. You can modify the Field Properties to automatically add one to create a new check number each time a new check is created. Click anywhere in the Check column and then choose the **Field Properties** dialog from the Setup menu (see "<u>Field Properties</u>" on page 216). (You can also open this dialog by double clicking on the field name at the top of the column.) The **New Database Wizard** has already set up some of the options in this dialog, including the Field Name and the Type.

	Field Properties
🗧 Name & Data Type	e
Field Name	Check
Туре	Numeric 🗘 Digits 0
	Output Pattern
_ Data Entry Option	s
Alignment	Right 🛟
Auto Capitalize	Off 🛟
Duplicates	Yes
Clairvoyance	Off 🗧
	Advanced Options
	Cancel OK

To set up the default value for this field press the **Advanced Options**... button in the Data Entry area. The Advanced Data Entry options dialog has several radio buttons for different default values — click the Automatic increment by one option.

Advanced Data Entry Options						
Input Pattern	Character Range					
•	Any C	Custo	m			
	Alphabetic	A	4			
Default Value	🔵 Numeric	В	X			
	AlphaNumeric	С				
+1		D	5			
Automatic increment by one		E	2			
O Today's Date		F				
-		G				
O Ditto		н				
		1				

After you click this option press this **OK** button twice to get back to the data sheet. Then press the **Add New Record** tool (or select **Add New Record** from the Edit menu).

0	0			My	My Checkbook				
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	
22	01/01/98		OPENING BALANCE	DEPOSIT			12,739.00	12,739.00	
Å	01/01/98	100	Sparkletts	Office Supplies		14.20		12,724.80	
	01/01/98	101	Blue Cross	Insurance	Health Insurance group XBG-	975.00		11,749.80	
33	01/01/98	102	Valley Gas	Utilities	Heating	49.90		11,699.90	
0+	01/01/98	103	AT&T	Telecom	Long Distance Phone Service	236.24		11,463.66	
	01/01/98	104	Surf Networks	Telecom	DSL	50.00		11,413.66	
$\left  \right\rangle$	01/01/98	105	United Security	Utilities	Alarm	30.00		11,383.66	
ţ	Add New	Reco	rd	Shipping		144.02		11,239.65	
	01701770		curson General	Utilities	January Electric	115.55		11,124.10	
10	01/01/98	108	City Services	Utilities	Water	54.39		11,069.71	

The new check automatically defaults to today's date and is assigned the next check number, in this case 562.

12/25/98 12/28/98		DEPOSIT Valley Publications	DEPOSIT	963.57	5,264.90	18,949.3
09/26/04		Poly Payroll Servi	Fayroll	1,749.38		16,236.4
09720704	562					
	-	i total 🛛 🚺 🔺 🕨 🌔				

# Pay To

The third field contains the name of the person or company the check is made out to. Since you will often write checks out to the same people over and over again you can take advantage of a very cool Panorama feature called Clairvoyance<sup>®</sup>. Clairvoyance automatically finishes your typing for you as soon as it thinks it can identify what you are about to type based on the previous entries (see "<u>Clairvoyance®</u>" on page 287). Clairvoyance can be turned on and off with the **Field Properties** dialog. Click anywhere in the Pay To column and then choose the **Field Properties** dialog from the Setup menu (see "<u>Field Properties</u>" on page 216). (You may have also heard that you can open this dialog by double clicking on the field name at the top of the column. It's really true!). The **New Database Wizard** has already set up some of the options in this dialog, including the **Field Name** and **Type** and **Auto Capitalize**. Use the pop-up menu to turn on the Clairvoyance option, as shown below.

Field Properties								
Name & Data Type								
Field Name	Pay To							
Туре	Text 🗘 Digits 0							
Output Pattern								
Data Entry Options								
Alignment	Left 🛟							
Auto Capitalize	Word 🗘							
Duplicates	Yes							
Clairvoyance	Off							
	On ed Options							

Press **OK** to close the dialog. Now try entering **Blue Cross** into the **Pay To** data cell. Leave your finger off the **Shift** key as you type because Panorama will automatically capitalize the first letter of each word for you! As soon as you press the letter l, Panorama's Clairvoyance<sup>®</sup> feature will complete the entry for you by typing ue Cross.



Clairvoyance automatically finishes your typing for you as soon as it thinks it can identify what you are about to type based on the previous entries. If Clairvoyance guesses wrong (because this is a new entry that hasn't appeared before) just keep typing and complete the entry yourself.

### Clairrows

When you hold down the **Command** key (Mac) or **Control** key (Windows), the up and down arrows on the keyboard become clairvoyant arrows, or "**clairrows**." With the key held down you can use the arrows to scan through the values that are already in the database. Each time you press **Command/Control-Down Arrow** the next value appears, while each time you press **Command/Control-Up Arrow** the previous value appears. You can scan through the values until you find the information you are looking for, then press the **Enter** key to enter the value. To give the clairrows a head start you can type in the first few letters of the information you are looking for.

	type b	В
	1	Blue Cross
Cmd/Ctl-Down	Arrow	Boston Direct
Cmd/Ctl-Down	Arrow	Century Equipmen
Cmd/Ctl-Down	Arrow	Champion Truckin
Cmd/Ctl-Up	Arrow	Century Equipmen
Cmd/Ctl-Up	Arrow	Boston Direct
	Enter	Boston Direct

### Category

The Category field places each check into one of 11 categories (Rent, Insurance, Telecom, etc.) One way to handle this field would be to use Clairvoyance® as described for the Pay To field. That way you would only have to type in the first letter or two of the category. However instead of using Clairvoyance you are going to set up a palette of radio buttons in the pop-up Input Box (see "<u>The Choice Palette</u>" on page 319). This palette will have a radio button for each category. To set up this palette you'll need to use the **design sheet**. Use the **View** menu to switch from the data sheet to the design sheet.

Page 143

			Data S	Sheet						S
Date	Checl	Pay To C	Desig	n Sheet		N	Debit	Credit	Balance	4
12/21/98		Coast General F	Flash	Art Scra	pbook	1. C	275.72		17,960.90	2
12/21/98		Office Depot C Staples C	New F	orm			72.46		17,888.43	п
12/21/98	554	Century Equipment F	Spe	ending (	Chart		,063.90		16,749.72	
12/21/98		Stamford Mfg F Post Office S	New C	Crosstal	<b>)</b>		472.37 204.62		16,277.35	11
12/21/98		Power Printing 4 Poly Payroll Servix F	Mo	nthly Sp	ending	)	542.50		15,530.23	
12/21/98		Fry's Electronics C	New F	Procedu	re		189.22		13,684.46	
12/25/98	560	DEPOSIT D Valley Publications 4	Mo	nth & C	ategory	/ Totals	963.57	5,264.90	18,949.36	
12/28/98	561	Poly Payroll Servie F	Res	tore Or	iginal [	Data	,749.38		16,236.42	
09/26/04	562	Boston Direct	_	_	_	_				X.
										v

The **design sheet** is kind of like a super-duper **Field Properties** dialog (see "<u>The Design Sheet</u>" on page 218). It allows you to see and modify all the properties of every field at once. Each line in the design sheet corresponds to a field, with the name and properties listed from left to right.

DateDate0LeftAnyOffOffOffYesTodayCheckNumeric0Right#,AnyOffOffOffYes+1Pay ToText0LeftAnyOnOffWordYesCategoryText0LeftAnyOffOffWordYesMemoText0LeftAnyOffOffOffYesDebitNumericFloatRight#,.**AnyOffOffOffYesCreditNumericFloatRight#,.**AnyOffOffOffYesBalanceNumericFloatRight*,.**AnyOffOffOffYes	Field Name	Type	Digits	Align	Output Pattern	Input Pattern	Range	Choices	Link	Clair	Tab	Caps	Dup	Default	Equa
Pay ToText0LeftAnyOnOffWord YesCategoryText0LeftAnyOffOffOffYesMemoText0LeftAnyOffOffOffYesDebitNumeric FloatRight #,.##AnyOffOffOffYesCreditNumeric FloatRight #,.##AnyOffOffOffYes	Date	Date	0	Left			Any			Off	Off	Off	Yes	Today	
Category       Text       O       Left       Any       Off       Off       Off       Yes         Memo       Text       O       Left       Any       Off       Off       Off       Yes         Debit       Numeric Float       Right #,.##       Any       Off       Off       Yes         Credit       Numeric Float       Right #,.##       Any       Off       Off       Yes	Check	Numenio	0	Right	*,		Any			Off	0ff	Off	Yes	+1	
Memo     Text     O     Left     Any     Off     Off     Yes       Debit     Numeric Float     Right #,.##     Any     Off     Off     Yes       Credit     Numeric Float     Right #,.##     Any     Off     Off     Yes	Pay To	Text					Any			On	Off	Word	Yes		
Debit         Numeric Float Right #,.##         Any         Off Off Off Yes           Credit         Numeric Float Right #,.##         Any         Off Off Off Yes	Category	Text	0	Left			Any			Off	0ff	Word	Yes		
Credit Numeric Float Right #,.## Any Off Off Off Yes	Memo	Text	0	Left			Any			Off	Off	Off	Yes		
	Debit	Numenio	Float	Right	*,.**		Any			Off	Off	Off	Yes		
Balance Numeric Float Right #,.## Any Off Off Off Yes	Credit	Numenio	Float	Right	*,.**		Any			Off	Off	Off	Yes		
	Balance	Numenio	Float	Right	#,##		Any			Off	Off	Off	Yes		

To set up the radio buttons click on the Category field name.

0	0				My Cl	heckbook:I	DESIG	N								
0	Field Name	Туре	Digits	Align	Output Pattern	Input Pattern	Range	Choices	Link	Clair	Tab	Caps	Dup	Default	Equat	4
Þ	Date	Date	0	Left			Any			Off	Off	Off	Yes	Today		1
R	Check	Numeric	0	Right	*,		Any			Off	0ff		Yes	-		
	Pay To	Text	0	Left			Any			On	Off	Word	Yes			
뚢	Category	Text	0	Left			Any			Off	Off	Word	Yes			
	Memo	Text	0	Left			Any			Off	Off	Off	Yes			
	Debit	Numeric	Float	Right	<b>*</b> ,. <b>*</b> *		Any			Off	Off	Off	Yes			

Now choose the **Automatic Choices**... command from the Special menu. This command will build a list of the radio buttons from the existing data. If you leave the number at 2 the command will include every category that occurs two or more times in the existing data (see "<u>Creating the List of Choices</u>" on page 319).



Press the **OK** button to create the list of choices. Since the width of the column is too narrow to see much of the list you can either make the column wider or double click on the list to see the entire list (as shown below). Notice that when a choice contains a space, for example Office Supplies, the space has been replaced with an \_ underscore character, i.e. Office\_Supplies.

Field Na	me Type	Digits	Align	Output Pattern	Input Pattern	Range	Choices	Link	Clair	Tab	Caps	Dup	Default	Equat
Date	Date	0	Left			Any			Off	Off	Off	Yes	Today	
Check	Numerio	0	Right	*,		Any			Off	0ff	Off	Yes		
Pay To	Text	0	Left	·		Any			On	Off	Word	Yes		
Categor	y Text	0	Left			Any	Rent Leg		Off	0ff	Word	Yes		
Memo	Text	0	Left			Any		-	Off	Off	Off	Yes		
							Shi Uti	pping   lities /	Insurar	nce P ising	<sup>p</sup> ayrol urchas Fixed.	es		

States and	Page 145

Use the View menu to switch back to the data sheet.

Ć	Pano	rama	File	Ec	lit	View	Special	Text	Security	/	Ser	ver	W	/izard	s		þ
	00						a Sheet				_						
9	Field Name	Туре	Digits	Align	Outp		ign Sheet	Range Cho		lair	Tab	Caps	Dup	Default	Equal	<b>1</b>	
2	Date	Date	0	Left		Flas	h Art Scra	pbook		)ff		Off		Today		6	
~	Check Bass To	Numeric		Right	<b>#</b> ,	New	Form			)ff )n			Yes				
9	Pay To Category	Text Text	0 0	Left Left		SI	pending C	hart		)ff		Word					
5	Memo	Text	0	Left			Crosstab			)ff	Off	Off	Yes				
*	Debit	Numeric								)ff			Yes				
	Credit Balance	Numeric Numeric				M	lonthly Sp	ending		)ff )ff		Off Off	Yes				
r					,.	New	Procedur	e							_		
						M	lonth & Ca	tegory '	Totals								
						R	estore Ori	ginal Da	ata							u	
						_	_	_	_							¥.	
																Ŧ	
															4 1	11.	

Before it switches back to the data sheet, Panorama will ask you if you want a "new generation" of your database. What it is really asking you is to confirm the changes you just made to the design sheet (see "<u>Database</u> <u>"Generations</u>" on page 218). Press the <u>Yes</u> button.



Double click on the empty data cell at the bottom of the Category column. The Input Box will appear, but it is so small you can only see the first button and part of the second.

12/25/98	DEPOSIT	DEPOSIT			5,264.90	18,949.36
12/28/98	560 Valley Publicatio	ns Advertising		963.57		17,985.80
12/28/98	561 Poly Payroll Ser	vic Payroll		1,749.38		16,236.42
09/26/04	562 Boston Direct	Pent O Leg				-
516 visibl	e/516 total 🛛 🗐 🔫	•(	<b></b>			)∢⊧,

Move the mouse to the bottom right corner of the Input Box. The cursor will flip over (see "<u>Expanding the</u> <u>Input Box</u>" on page 277). Drag the mouse to expand the Input Box.

-	12/25/98		DEPOSIT	DEPOSIT		5,264.90	18,949.36	
	12/28/98	560	Valley Publications	Advertising	963.57		17,985.80	
	12/28/98	561	Poly Payroll Servi	Payroll	1,749.38		16,236.42	
	09/26/04	562	Boston Direct	Rent O Lec				
								4
								Ŧ
	516 visib	le/516	i total 🛛 📕 🔸 🕨				_)++	11.

The radio buttons will automatically flow into the expanded box as you change its shape.

12/25/9	8	DEPOSIT	DEPOSIT						5,264.90	18,949.36
12/28/9	8 560	Valley Publications	Advertising					963.57		17,985.80
12/28/9	8 561	Poly Payroll Servi	Payroll					1,749.38		16,236.42
09/26/0	)4 562	Boston Direct	Rent	0	Telecom	Ο	Utilities			
				Ō	Insurance	Ō	Advertising Fixed Assets			
516 v	isible/516	i total 🛛 🖣 🕨	() Payroll	0	Purchases	0	Office Supplies			)++

The box can be tall and skinny, short and fat, or anything in between. To select a value just click on the button and press **Enter** or **Tab**, or simply double click on the button. You can also select a value by typing in the first few letters of the value, for example U for Utilities or Pu for Purchases.

The radio buttons are great if you want to select from one of the predefined categories, but what if you want to add a check in a new category? To allow this you'll need to go back to the design sheet (use the **View** menu).

0	00			1	My Checkbo	ok:DESIGN							
3	Field Name	Туре	Digits	Align	Output Pattern	Input Pattern	Range	Choices	Link	Clair	Tab	Caps	Di 🌢
•	Date	Date	0	Left			Any			Off	Off	Off	Y.
$\mathbf{z}$	Check	Numenio	0	Right	*,		Any			Off	Off	Off	Ye
	Pay To	Text	0	Left			Any			On	Off.	Word	Ye
33	Category	Text	0	Left			Any	Rent Lec		Off	Off.	Word	Ye
۵.	Memo	Text	0	Left			Any			Off	Off.	Off	Ye
	Debit	Numenio	Float	Right	*,.**		Any			Off	Off	Off	Ye
$\left  \right\rangle$	Credit	Numenio	Float	Right	<b>*</b> ,. <b>*</b> *		Any			Off	Off	Off	Ye

Double click on the list of choices, and then type a space and a dozen underscores at the end of the list. (The underscore is just to the right of the **0** key, hold down the **Shift** key and press -).

<	Date Numeric	0	Left									
	Numeric					Any			Off	Off	Off	Y
_	reamer to	0	Right	*,		Any			0ff	Off	Off	Ye
Го	Text	0	Left			Any			On	Off	Word	Ye
pory	Text	0	Left			Any	Rent Leg	al DEP	OSIT F	ayro	oll Tele	ecom
						Any	Shipping	Insura	ance Pi	urcha	ases	
	Numeric	Float	Right	*,.**		Any	Utilities	Adver	tising	Fixe	d_Ass	ets
it	Numeric	Float	Right	<b>#</b> ,. <b>##</b>		Any	Office_S	upplie	s			ļ
ice	Numenio	Float	Right	*,**		Any						-
								_	_	_	_	
j	ory t	ory Text Text Numeric t Numeric	ory Text O Text O Numeric Float t Numeric Float	ory Text O Left Text O Left Numeric Float Right t Numeric Float Right	ory Text O Left Text O Left Numeric Float Right #,.## t Numeric Float Right #,.##	ory Text O Left Text O Left Numeric Float Right #,.## t Numeric Float Right #,.##	ory Text O Left Any Text O Left Any Numeric Float Right #,.## Any t Numeric Float Right #,.## Any	ory Text O Left Any Rent Leg Text O Left Any Shipping Numeric Float Right #,.## Any Utilities t Numeric Float Right #,.## Any Office_S	ory Text O Left Any Rent Legal DEP Text O Left Any Shipping Insura Numeric Float Right #,.## Any Utilities Adver t Numeric Float Right #,.## Any Office_Supplie	ory     Text     0     Left     Any     Rent Legal DEPOSIT F       Text     0     Left     Any     Shipping Insurance Po       Numeric Float     Right #,.##     Any     Utilities Advertising       t     Numeric Float     Right #,.##     Any     Office_Supplies	ory     Text     0     Left     Any     Rent Legal DEPOSIT Payro       Text     0     Left     Any     Shipping Insurance Purcha       Numeric Float     Right #,.##     Any     Utilities Advertising Fixed       t     Numeric Float     Right #,.##     Any     Office_Supplies	ory     Text     0     Left     Any     Rent Legal DEPOSIT Payroll Tele       Text     0     Left     Any     Shipping Insurance Purchases       Numeric Float     Right #, ##     Any     Utilities Advertising Fixed_Asse       t     Numeric Float     Right #, ##     Any     Office_Supplies

Press the **Enter** key and then use the **View** menu to go back to the data sheet. Double click on the Category field.

12/25/98		DEPOSIT	DEPOSIT						5,264.90	18,949.36
12/28/98		Valley Publications						963.57		17,985.80
12/28/98	561	Poly Payroll Servie	Payroll					1,749.38		16,236.42
09/26/04	562	Boston Direct		Ō	Insurance	Õ	Utilities Advertising Fixed Assets			
516 visibl	e/516	total 🛛 🔺 🕨	() Payroll	U	Purchases	0	Office Supplies		_	) 4 🕨

It looks just the same as before! What's up with that? To find out, expand the Input Box just a little bit more.

4	12/25/98 12/28/98 12/28/98 09/26/04	561	DEPOSIT Valley Publications Poly Payroll Servi Boston Direct	Payroll O Rent O Legal O DEPOSIT O Payroll	<ul> <li>Shipping</li> <li>Insurance</li> <li>Purchases</li> <li>Utilities</li> <li>Advertising</li> </ul>	0 Fixed Assets 0 Office Supplies 0	963.57 ,749.38	5,264.90	18,949.36 17,985.80 16,236.42	
	516 visibl	e/516	i total 📗 🖣 🕨	_	_	•		_	)++	11.

Now you can see that there is one additional radio button at the end of the list. To enter a new category click on this radio button and then type in the new category, in this case Auto.

4	12/25/98 12/28/98 12/28/98 09/26/04	561	DEPOSIT Valley Publications Poly Payroll Servi Boston Direct	Payroll O Rent O Legal O DEPOSIT O Payroll	000	Shipping Insurance Purchases Utilities Advertising	Ō	1 Fixed Assets Office Supplies Auto	963.57 ,749.38 ]	5,264.90	18,949.3 17,985.8 16,236.4	0	
	516 visibl	e/516	i total 🛛 🗐 🔸 🕨			_	e	•		_	_)∢	- 7	8

Press the **Enter** key when the entry is completed.

4	12/25/98	DEPO	ISIT	DEPOSIT		5,264.9	0 18,949.36	
_	12/28/98	560 Valle	y Publications	Advertising	96	3.57	17,985.80	
and the second	12/28/98	561 Poly	Payroll Servi	Payroll	1,74	9.38	16,236.42	
10000	09/26/04	562 Bosto	on Direct	Auto				
								$\mathbf{v}$
								4
and the second								v
1000	E12 Market	. /= 1 / 1 . 1 . 1						
and the second	516 VISIDI	e/516 total			 			14

To learn more about this feature see "<u>Exceptions</u>" on page 320. Before going on to the next step I recommend that you **Save** the database one more time.

#### Looking Up the Category From a Previous Record

In this database a particular Pay To will almost always go with a particular category. For example the category for checks to Blue Cross will always be Insurance, while the category for Staples will always be Office Supplies. Panorama can be set up to automatically look up the category from the previous record, if any. To do this you'll use the design sheet again. Use the **View** menu to switch to the design sheet again, then double click on the Equation column of the Category row (see "Automatic Calculations" on page 306).

Field Name	Type	Digits	Align	0	Default Equation	Read	Write	Width	Notes	
Date	Date	0	Left		Today	0	0	8	1	
Check	Numenio	0	Right	*	+1	0	0	- 3		
Pay To	Text	0	Left			0	0	12		
Date Check Pay To Category Memo Debit Credit	Text	0	Left							
Memo	Text	0	Left							
Debit	Numenio	Float	Right	*						
Credit	Numenio						- U			
Balance	Numenio	Float	Right	*		0	0	7		
				- 11						

Now choose lookup(...) from the Functions menu (see "Functions Menu" on page 1181).

R.

Functions		
Operators	•	lower(text)
Advanced		max(number,number)
Arrays		min(number,number)
?(cond,trueFormula,falseFormula)		Misc 🕨
abs(number)		pattern(number,pattern)
asc(text)		rep(text,number)
chr(number)		replace(text,oldtext,newtext)
city(zip)		replacemultiple(text,oldtext,newtext,sep)
clipboard()		rnd()
county(zip)		round(number,step)
Date & Time	Þ	sandwich(pretext,text,suftext)
divzero(numerator,denominator)		search(text,phrasetext)
exportcell(field)		seq()
extract(text,separator,itemnum)		sizeof(text)
fieldstyle(fieldname)		state(zip)
fix(number)		str(number)
fixed(number)		strip(text)
float(number)		stripchar(text,range)
grabdata(file,field)		striptonum(text)
Graphics	M	striptoalpha(text)
import()		sum(lineΩ)
Info		uniqueid(field,root)
int(number)		upper(text)
length(text)		upperword(text)
listchoices(field,separator)		val(text)
lookup()		zeroblank(number)

Choosing this menu item opens a dialog for setting up the **lookup(** function (see "<u>Linking With Another</u> <u>Database</u>" on page 1267).

Lookup Function Wizard
I want to retrieve information from the 🔹
database using the lookup 🗘 function.
The information I want to retrieve is in the field of this database.
The information I want to retrieve is in the record where the
field 🚺 in the database Untitled
matches the field 🚺 in the database My Checkbook.
Cancel OK

Start by selecting the database you want to look up data from, in this case the current database.

Look	up Function Wizard
I want to retrieve information from the database using the lookup	My Checkbook Summary & Outline Wizard ZipInfo_ZipInfo.com
The information I want to retrieve is in th	e 🚺 field of this database.

Next, tell Panorama that if there is more than one match in the database you are interested in the last match (closest to the bottom), not the first (see "Lookup Variations" on page 1272).

	Lookup Fund	tion Wizard
I want to retrieve informati	on from the My Ch	eckbook 🗧
database using the	lookup table	function.
The information I want to	lookuplast lookupselected	🗧 field of this database.

Now tell Panorama what yo	ı want to look up	o, in this case the	e Category.
---------------------------	-------------------	---------------------	-------------

Lookup Function Wizard						
I want to retrieve information from the My	Checkbook					
database using the lookuplast	🗘 function.					
The information I want to retrieve is in the	Date 🔹 field of this database. Check					
The information I want to retrieve is in the r	Pay To Category					
field 🚺 📫 in the data	Memo book					
matches the field	Debit Credit <sup>se</sup> My Checkbook. Balance					
	Cancel OK					

We want to look up the category in the last record in the database where the Pay To value matches the Pay To value in the current field. So select **Pay To** for both of the last two pop-ups.

Т	he information I want t	o retrieve is in th	he record where the
	field Pay To	📫 in the o	database My Checkbook
	matches the field	Date Check	in the database My Checkbook.
Ļ	_	Pay To Category Memo Debit Credit Balance	Cancel OK

Here's the finished dialog with everything filled in.

Lookup Function Wizard
I want to retrieve information from the My Checkbook
database using the lookuplast 🗧 function.
The information I want to retrieve is in the Category field of this database.
The information I want to retrieve is in the record where the
field Pay To 🗧 in the database My Checkbook
matches the field Pay To 💠 in the database My Checkbook.
Cancel OK

Press the **OK** button to build the formula for looking up the previous category.

Field Name	Type	Digits	Align	0	Default	Equation	Read	Write	Width	Notes	
Date	Date	0	Left		Today		0	0	8		
Check	Numenio	0	Right	*	+1		0	0	- 3		
Pay To	Text	0	Left				0	0	12		
Category	Text	0	Left			lookuplast("My Checkbook","F	ay To",«	Pay			
Memo	Text	0	Left			To»,"Category","",O)		-	$\mathcal{I}$		
Debit	Numenio	Float	Right	*							
Credit	Numenio	Float	Right	*							
Balance	Numeric	Float	Right	*			0	0	7		

To learn more about how this formula works see "<u>Linking With Another Database</u>" on page 1267. For now just press the **Enter** key and use the **View** menu to switch to the data sheet. Then start typing **Staples** into the **Category** field.

12/28/98 560 Valley Publications Advertising	963.57	17,985.80
12/28/98 561 Poly Payroll Servie Payroll	1,749.38	16,236.42
09/26/04 562 Staples		
		<b></b>

When you press the **Enter** key Panorama will automatically look up the appropriate category, in this case Office Supplies.

	12/28/98	560 Valley Publications	Advertising	963.57	17,985.80
and the second	12/28/98	561 Poly Payroll Servi	Payroll	1,749.38	16,236.42
-	09/26/04	562 Staples	Office Supplies		

Sometimes the check amount is the same from check to check also, for example a rent or subscription payment. You can go back to the design sheet and use the same technique to build a formula to look up the previous check amount. The formula is almost the same as before, but this time it looks up the Debit field and has a default value of **0** instead of "" (see "Linking With Another Database" on page 1267).

Field Name	Type	Digits	A	Equation	Read	Write	Width	Notes	4
Date	Date	0	L		0	0	8		
Check	Numeric	0	R		0	0	- 3		_
Pay To	Text	0	니		0	0	12		
Category	Text	0	L	lookuplast("My Checkbook","Pa	0	0	10		
Memo	Text	0	니		0	0	18		
Debit	Numenio	Float	R	lookuplast("My Checkbook","Pay	», "To	Pay			
Credit	Numenio	Float	R	To»,"Debit","",0)	-	-			
Balance	Numenio	Float	R						

One potential problem with both of these formulas is that they will stop working if the name of the checkbook file changes — it's hard coded as My Checkbook. To fix that you can replace "My Checkbook" with info("databasename"), as shown below (see "Looking Up Data in the Current File" on page 1280).

Field Name	Type	Digits	Α	Equation	Read	Write	Width	Notes	4
Date	Date	0	L		0	0	8		
Check	Numenio	0	R		0	0	- 3		
Pay To	Text	0	L		0	0	12		
Category		0	L	lookuplast("My Checkbook","Pa	0	0	10		
Memo	Text	0	L		0	0	18		
Debit	Numenio	Float	R	lookuplast(info("databasename")	,"Pay T	`o",≪Pa	У		
Credit	Numenio	Float	R	To»,"Debit","",0)					
Balance	Numenio	Float	R						

Press the **Enter** key, use the **View** menu to go back to the data sheet, then start typing Pacific Properties into the Category field.

<u> </u>	12/28/98	560 Valley Publications	Advertising	963.57	17,985.80
and the second	12/28/98	561 Poly Payroll Servie	Payroll	1,749.38	16,236.42
	09/26/04	562 Pacific Properties	Office Supplies		
-					

When you press the **Enter** key Panorama will look up both the category and the amount from the previous check to Pacific Properties.

<u> </u>	12/28/98	560 Valley Publication	s Advertising	963.57	17,985.80	
and the second	12/28/98	561 Poly Payroll Serv	ii Payroll	1,749.38	16,236.42	
10000	09/26/04	562 Pacific Propertie	Rent	1,580.00		
					0	

If this isn't the correct amount you can simply tab over to the Debit field and type in the actual amount. If you haven't done so already, **Save** the database again now.

## **Calculating the Checkbook Balance**

To calculate the running checkbook balance you'll need to record a quick procedure. Start by turning the recorder on (see "<u>Creating a Procedure with the Recorder</u>" on page 1346).

0	0			My (	Checkbook				
•	Date	Checl Pay T	0	Category	Memo	Debit	Credit	Balance	4
29	<b>Record Pre</b>	ocedure	Supply	Purchases	Invoice 6387	308.49		18,236.62	Ľ.
4	12/21/98	551 Coast		Purchases	Invoice 61471	275.72		17,960.90	_
o l	12/21/98	552 Office	Depot	Office Supplies		72.46		17,888.43	
33	12/21/98	553 Staple	Is	Office Supplies		74.81		17,813.62	
۵.	12/21/98	554 Centur	ry Equipment	Fixed Assets		1,063.90		16,749.72	
	12/21/98	555 Stamf	ord Mfa	Purchases	Invoice 19188	472 37		16 277 35	

Scroll over to the Balance field and click somewhere in the field.

0	0 0			My	/ Checkbook				
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	
99	12/21/98	550	Clark Supply	Purchases	Invoice 6387	308.49		18,236.62	
Я	12/21/98	551	Coast General	Purchases	Invoice 61471	275.72		17,960.90	
	12/21/98	552	Office Depot	Office Supplies		72.46		17,888.43	
5	12/21/98	553	Staples	Office Supplies		74.81		17,813.62	
۵.	12/21/98	554	Century Equipment	Fixed Assets		1,063.90		16,749.72	
	12/21/98		Stamford Mfg	Purchases	Invoice 19188	472.37		16,277 5	
₽	12/21/98	556	Post Office	Shipping		204.62		16,072.73	
4	12/21/98	557	Power Printing	Advertising		542.50		15,530.23	
-	12/21/98	558	Poly Payroll Servie	Payroll		1,656.55		13,873.68	

Choose the Formula Fill... command from the Math menu (see "Filling a Field with a Formula" on page 431).

Math		
Tota	il 👘	ЖT
Ave	rage	жJ
Cou	nt	
Min	imum	
Мах	timum	
Run	ning Tota	al
Run	ning Diffe	erence
Fort	nula Fill.	%=
Fill.		<b>N</b>

Enter the formula Credit-Debit. You can use the Fields menu to help you type in the field names.

Panorama Edit	Fields Fun	ctions
Enter the formul	Date Check Pay To Category Memo Debit	II «Balance»
	Credit Balance	

The finished formula should look like this.

Formula Fill «Balance»			
Enter the formula:			
Credit-Debit			

When you press the **OK** button Panorama will perform this calculation over and over again for every record in the database (see "<u>Filling a Field with a Formula</u>" on page 431).

12/21/98       550       Clark Supply       Purchases       Invoice 6387       308.49       -308.49         12/21/98       551       Coast General       Purchases       Invoice 61471       275.72       -275.72         12/21/98       552       Office Depot       Office Supplies       72.46       -72.46         12/21/98       553       Staples       Office Supplies       74.81       -74.81         12/21/98       554       Century Equipment       Fixed Assets       1,063.90       -1,063.90         12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -472.37         12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -542.50         12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servir       Payroll       1,656.55       -1656.55         12/21/98       558       Poly Payroll Servir       Payroll       1,656.55       -1656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       560       Valley Publications       Advertising <th></th> <th>Date</th> <th>Checl</th> <th>Pay To</th> <th>Category</th> <th>Memo</th> <th>Debit</th> <th>Credit</th> <th>Balance</th> <th>Ľ</th>		Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	Ľ
12/21/98       552       Office Depot       Office Supplies       72.46       72.46         12/21/98       553       Staples       Office Supplies       74.81       -74.81         12/21/98       554       Century Equipment       Fixed Assets       1,063.90       -1,063.90         12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -472.37         12/21/98       556       Post Office       Shipping       204.62       -204.62         12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servi       Payroll       1,656.55       -11,656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       560       Valley Publications       Advertising       963.57       -963.57         12/28/98       561       Poly Payroll Servi       Payroll       1,749.38       -1,749.38	2	12/21/98	550	Clark Supply	Purchases	Invoice 6387	308.49		-308.49	U
12/21/98       532       Office Deport       Office Supplies       12.46       12.46         12/21/98       553       Staples       Office Supplies       74.81       -74.81         12/21/98       554       Century Equipment       Fixed Assets       1,063.90       -1,063.90         12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -472.37         12/21/98       556       Post Office       Shipping       204.62       -204.62         12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servic       Payroll       1,656.55       -11,656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       560       Valley Publications       Advertising       963.57       -963.57         12/25/98       560       Valley Publications       Advertising       963.57       -963.57         12/28/98       561       Poly Payroll Servic       Payroll       1,749.38       -1,749.38 <td>5</td> <td>12/21/98</td> <td>551</td> <td>Coast General</td> <td>Purchases</td> <td>Invoice 61471</td> <td>275.72</td> <td></td> <td>-275.72</td> <td>1</td>	5	12/21/98	551	Coast General	Purchases	Invoice 61471	275.72		-275.72	1
12/21/98       554       Century Equipment       Fixed Assets       1,063.90       -1,063.90         12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -472.37         12/21/98       556       Post Office       Shipping       204.62       -204.62         12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servic       Payroll       1,656.55       -1,656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       559       DEPOSIT       DEPOSIT       5,264.90       5,264.90         12/28/98       560       Valley Publications       Advertising       963.57       -963.57         12/28/98       561       Poly Payroll Servic       Payroll       1,749.38       -1,749.38		12/21/98	552	Office Depot	Office Supplies		72.46		-72.46	
12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -472.37         12/21/98       556       Post Office       Shipping       204.62       -204.62         12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servix       Payroll       1,656.55       -1,656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/25/98       DEPOSIT       DEPOSIT       DEPOSIT       5,264.90       5,264.90         12/28/98       560       Valley Publications       Advertising       963.57       -963.57         12/28/98       561       Poly Payroll Servix       Payroll       1,749.38       -1,749.38	1	12/21/98	553	Staples	Office Supplies		74.81		-74.81	
12/21/98       555       Stamford Mfg       Purchases       Invoice 19188       472.37       -472.37         12/21/98       556       Post Office       Shipping       204.62       -204.62         12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servi       Payroll       1,656.55       -1,656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/21/98       559       Fry's Electronics       Office Supplies       5,264.90       5,264.90         12/25/98       DEPOSIT       DEPOSIT       963.57       -963.57       -963.57         12/28/98       561       Poly Payroll Servi       Payroll       1,749.38       -1,749.38		12/21/98	554	Century Equipment	Fixed Assets		1,063.90		-1,063.90	
12/21/98       557       Power Printing       Advertising       542.50       -542.50         12/21/98       558       Poly Payroll Servic Payroll       1,656.55       -1,656.55         12/21/98       559       Fry's Electronics       Office Supplies       189.22       -189.22         12/25/98       DEPOSIT       DEPOSIT       5,264.90       5,264.90       5,264.90         12/28/98       560       Valley Publications       Advertising       963.57       -963.57         12/28/98       561       Poly Payroll Servic Payroll       1,749.38       -1,749.38	_	12/21/98	555	Stamford Mfg	Purchases	Invoice 19188	472.37		-472.37	
12/21/98         558         Poly Payroll Servix         Payroll         1,656.55           12/21/98         559         Fry's Electronics         Office Supplies         189.22         -189.22           12/25/98         DEPOSIT         DEPOSIT         5,264.90         5,264.90           12/28/98         560         Valley Publications         Advertising         963.57         -963.57           12/28/98         561         Poly Payroll Servix         Payroll         1,749.38         -1,749.38	•	12/21/98	556	Post Office	Shipping		204.62		-204.62	
12/21/98         558         Poly Payroll Servi         Payroll         1,656.55           12/21/98         559         Fry's Electronics         Office Supplies         189.22         -189.22           12/25/98         DEPOSIT         DEPOSIT         5,264.90         5,264.90         5,264.90           12/28/98         560         Valley Publications         Advertising         963.57         -963.57           12/28/98         561         Poly Payroll Servi         Payroll         1,749.38         -1,749.38		12/21/98	557	Power Printing	Advertising		542.50		-542.50	
12/25/98         DEPOSIT         DEPOSIT         5,264.90         5,264.90           12/28/98         560         Valley Publications         Advertising         963.57         -963.57           12/28/98         561         Poly Payroll Servix Payroll         1,749.38         -1,749.38		12/21/98	558	Poly Payroll Servi	Payroll		1,656.55		-1,656.55	L
12/25/98         DEPOSIT         DEPOSIT         5,264.90         5,264.90           12/28/98         560         Valley Publications         Advertising         963.57         -963.57           12/28/98         561         Poly Payroll Servic Payroll         1,749.38         -1,749.38		12/21/98	559	Fry's Electronics	Office Supplies		189.22			_
12/28/98         560 Valley Publications Advertising         963.57         -963.57           12/28/98         561 Poly Payroll Servi Payroll         1,749.38         -1,749.38		12/25/98			DEPOSIT			5,264.90	5,264.90	
12/28/98 561 Poly Payroll Servi Payroll 1,749.38 -1,749.38		12/28/98	560	Valley Publications	Advertising		963.57	ŕ		
09/26/04 562 Pacific Properties Rent 1,580.00 -1,580.00		12/28/98	561	Poly Payroll Servi	Payroll		1,749.38			
		09/26/04	562	Pacific Properties	Rent		1,580.00		-1,580.00	

To complete the balance calculation choose the **Running Total** command from the Math menu (see "<u>Running Total</u>" on page 382).

Math							
Tota	il 👘	ЖT					
Ave	rage	ЖJ					
Cou	Count						
Min	Minimum						
Maximum							
Run	Running Total 📐						
Run	ning Diff	ereñce					

This command will calculate the balance after each check or deposit (see "<u>Using Running Total to Balance a</u> <u>Checkbook</u>" on page 382).

	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance	ŀ
2	12/21/98	550	Clark Supply	Purchases	Invoice 6387	308.49		18,236.62	l
-	12/21/98	551	Coast General	Purchases	Invoice 61471	275.72		17,960.90	1
	12/21/98	552	Office Depot	Office Supplies		72.46		17,888.43	1
ť.	12/21/98	553	Staples	Office Supplies		74.81		17,813.62	1
	12/21/98	554	Century Equipment	Fixed Assets		1,063.90		16,749.72	1
_	12/21/98	555	Stamford Mfg	Purchases	Invoice 19188	472.37		16,277.35	1
•	12/21/98	556	Post Office	Shipping		204.62		16,072.73	1
	12/21/98	557	Power Printing	Advertising		542.50		15,530.23	
	12/21/98	558	Poly Payroll Servi	Payroll		1,656.55		13,873.68	
	12/21/98	559	Fry's Electronics	Office Supplies		189.22		13,684.46	1
	12/25/98		DEPOSIT	DEPOSIT			5,264.90	18,949.36	1
	12/28/98	560	Valley Publications	Advertising		963.57		17,985.80	l
	12/28/98	561	Poly Payroll Servi	Payroll		1 ,749.38		16,236.42	I
	09/26/04	562	Pacific Properties	Rent		1,580.00		14,656.42	

To finish the recording select the recorder tool again.

0	0			My Checkbook						
•	Date	Checl	Pay To	Category	Memo	Debit	Credit	Balance		
29	<b>Record Pr</b>	ocedu	Supply	Purchases	Invoice 6387	308.49		18,236.62		
4	12/21/98	551	Coast General	Purchases	Invoice 61471	275.72		17,960.90		
	12/21/98	552	Office Depot	Office Supplies		72.46		17,888.43		
33	12/21/98	553	Staples	Office Supplies		74.81		17,813.62		
۵.	12/21/98	554	Century Equipment	Fixed Assets		1,063.90		16,749.72		
	12/21/98		Stamford Mfg	Purchases	Invoice 19188	472.37		16,277.35		
$\left  \right\rangle$	12/21/98	556	Post Office	Shipping		204.62		16,072.73		
4	12/21/98	557	Power Printing	Advertising		542.50		15,530.23		
_	12/21/98	558	Poly Payroll Servie			1,656.55		13,873.68		
	12/21/98			Office Supplies		189.22		13,684.46		
	! !									

Pick a name for the new procedure and type it in, then press the **Create Procedure** button.

	Save Recording
New p	rocedure name
Runni	ng Balance
	Cancel Save Procedure

Now any time you need to update the checkbook balance you can simply select your new procedure from the **Action** menu.

Action						
Mont	h & Category Totals					
Restore Original Data						
Runn	ing Balance 💦 👘					

If you are curious to see what the code in your new procedure looks like you can use the **View** menu to open it (see "<u>Editing a Procedure</u>" on page 114).

00	My Checkbook:Running B	Balance
🕨 Field "Bal	ance"	4
下 FormulaF	ill Credit-Debit	v
😴 RunningT	otal	
3		
<u>a</u>		
		×
		•
	Procedure opened.	< > ) < > //

Before moving on to the next step it's a good idea to... you guessed it, Save the database.

## **Drawing a Check Form**

To complete your check database you'll create a check form that can be used for data entry. If you are using a Windows PC hold down the **Alt** key, if you are using a Macintosh hold down the **Control** key. Either way, select **New Form** from the View menu (see "<u>Creating a New Form</u>" on page 465). Type in the name of the new form (up to 25 characters).

Create New Form							
New Form Name:	📃 Insert before:						
Check	Spending Chart						
Cancel Blank Form	Quick Label Quick Report						

Press the **Blank Form** button to create the new form, then adjust the window to the approximate size of a check.

			My Cł	neckbook			
Date	Checl	Pay To	Category	Memo	Debit	Credit 🔺	
12/21/98 12/21/98 12/21/98 12/21/98 12/21/98 12/21/98 12/21/98 12/21/98 12/21/98 12/21/98 12/25/98 12/28/98 12/28/98	551 552 553 554 555 556 557 558 559 560 561	Fry's Electronics DEPOSIT Valley Publication: Poly Payroll Serv	Adve Payr Offic DEPO Adve	Invoice 6387 Invoice 61471	308.49 275.72 72.46 74.81	- 1	
				Geneva	12pt 🔻		▼ ▼ ♪ ///

Now choose the Form Preferences... command from the Setup menu and use the pop-up menu to set the form's background color to light green.

Fo	rm Preferences	
Viewing Format:	Individual Pages	
	⊖ View-as-List	
Tab Order:	💽 Natural	
	O Data Sheet Order	
	Back to Front	
Options:	E Fractional Font Widths	
	Use Data Style/Color	
	Enable up/down arrows	
	🗹 FileGlobal Variables	
	Allow Clones	
	Use Server for lookup	
	🗌 72 dpi Printing	
Ruler Units:	Inches 🗧	
Nudge Distance:	1 pixel	
Bkgnd Color:		

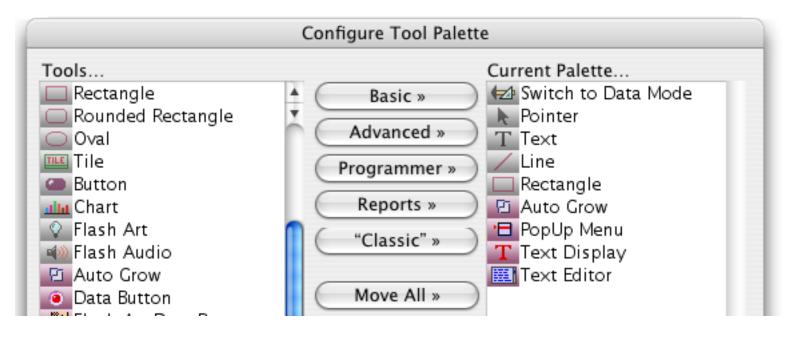
Before you actually start building the form you need to customize the graphic tool palette. Use the **Tool Palette** command in the Setup menu to open the tool configuration dialog.

- 😩	File	Edit	View	Arrange	Text	Graph	nics	Setup Wizards	Help	_
	File Date 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/21/9 12/28/9	( 98 98 98 98 98 98 98 98 98 98 98 98 98	Checl Pa 550 Cl. 551 Co 552 Of 553 St 554 Ce 555 St 556 Po 557 Po 558 Po 559 Po 559 Po 559 Po 559 Va	y To ark Supply ast General fice Depot aples ntury Equipmen amford Mfg st Office wer Printing	Categor Purchas Office S Office S Fixed Purcl Shipp Adve Payr Offic DEPO Adve	My Ch y ses ses Supplies Supplies		Rename Form Delete Form Rearrange Fo Install Custon	ms n Menus nces ences Options nts es ≋N	Credit 18 17 17 17 17 17 17
	515 \	visible/	/515 tot	al 🚺				Geneva	12pt 1	▼ ◀ Ⅲ ▶ ∅

There are a total of 29 graphic tools available for use in Panorama (shown in the list below on the left). Many computer screens are not large enough to handle this complete palette of tools (and we expect the number of tools to increase in future versions). To get around this problem, Panorama allows you to customize the graphic tool palette on the fly (see "<u>Customizing the Tool Palette</u>" on page 475). You can configure the palette to contain only the tools that you need right now in any order you want. If your needs change later, you can simply reconfigure the palette at any time.

	Configure Tool Palette
Tools	Current Palette
<ul> <li>Switch to Data Mode</li> <li>Pointer</li> <li>Crosshair Pointer</li> <li>Magnify</li> <li>Data Cell</li> <li>Text</li> <li>Line</li> <li>Rectangle</li> <li>Rounded Rectangle</li> <li>Oval</li> <li>Tile</li> <li>Button</li> <li>Chart</li> <li>Flash Art</li> <li>Flash Audio</li> <li>Auto Grow</li> <li>Data Button</li> <li>Flash Art Data Button</li> <li>Flash Art Push Button</li> <li>Elash Art Push Button</li> <li>List</li> <li>PopUp Menu</li> <li>Push Button</li> </ul>	Basic » Advanced » Programmer » Reports » "Classic" » Move All » Move All » Insert » Delete Delete All
	Cancel OK

On the right is a list of the tools you currently have installed. If this list is empty, Panorama will use the default tool palette. To move a tool from the left to the right, double click on the tool in the left. Or you can select the tool (or tools) and press the **Move** or **Insert** button. Move the nine tools shown below into the list on the right.



When you press the **OK** button the tool palette in the form will be updated.

	My Checkbook:Check (100%)	U B
	าปานในปาปนปายในปายไม่ปายไ <mark>ข</mark> ับปายไ	
Ť		
2-		-
	Geneva 🛛 12pt 🔻 🕻 🏢	▶ //j

# **Creating the Text Editor SuperObjects**

Using the **Text** menu or the Graphic Control Strip set the text size to 9 points (see "<u>Text Font, Size and Style</u>" on page 571).

Te	ext			
	Font	►		
	Size	•		9point 🔪
~	Plain Text	ЖT		10 *
	Bold	≋В	~	12
	Italic			14
	<u>Underline</u>	æυ		18
	Outline			24
	<u>Shadow</u>			36
	Condense			48
	Extended			
~	Left Justify			Up %[ Down %]
	Center			
	Right		_	Other
	Full		L	
	Output Pattern			
	Build Formula	ЖF		

With the **Pointer** tool selected, click the mouse in approximately the location shown below.

	My Checkbook:Check (100%) 📃 📃 🗉	
		•
T		
	▶	

Now select the **Auto Cell Layout** command from the Arrange menu (see "<u>Automatically Creating Rows or</u> <u>Columns of Data Cells or Text Editor SuperObjects</u>" on page 640). You used this command in your My Mailing List database to create data cells, now you'll use it to create **Text Editor SuperObjects** (see "<u>Types of Data</u> <u>Editing Objects</u>" on page 610).

Automatic Cell Layout		
Select All Fields Line Items Date Check Pay To Category Memo Debit Credit Balance	Layout: Across Same Width 1 Object Height (Lines) 0 Spacing (Pixels) Extras: Field Names Boxes SuperObject: Create SuperObjects™ Borders: Top Left Bottom Right Shadow 3D Formatting: Wrap at end of line Non-White Background Term when: Return Tab Up/Down Arrows	
	Cancel OK	

Start by holding down the **Shift** key and clicking on each of the first six fields.

Automatic Cell Layout		
Select All Fields Line Items Date Check Pay To Category Memo Debit Credit Balance	Layout: Across Same Width 1 Object Height (Lines) 0 Spacing (Pixels) Extras: Field Names Boxes SuperObject: Create SuperObjects™ Borders: Top Left Bottom Right	

Next click on the Create SuperObjects<sup>™</sup> and 3D checkboxes.

Automatic Cell Layout		
Select All Fields Line Items Layout: Across Same Width		
Date	1 Object Height (Lines)	
Check Pay To	0 Spacing (Pixels)	
Pay To Category	( , , , , , , , , , , , , , , , ,	
Memo	Extras: Field Names Boxes	
Debit	SuperObject: ✓ Create SuperObjects™	
Credit Balance	Borders: Top Left	
bulance	Bottom Right	
	Shadow 🗹 3D	
	Formatting: 🗹 Wrap at end of line	
	🗹 Non-White Background	

Press the **OK** button to create the Text Editor SuperObjects.

My Checkbook:Chec	:k (100%) 📃 🗏 🗄
IN 111111111111111111111111111111111111	98
Geneva Geneva	9pt 🔻 🕻 🎹 🕨 🥢

Text Editor SuperObjects may be used as an alternative to data cells for editing text within a form. You can already see one difference between these two types of objects — the Text Editor SuperObject displays data even in **Graphic Design Mode**, not the field name. To see the major difference between these two types of objects switch the form to **Data Access Mode** (see "Form Modes: Data Access vs. Graphic Design" on page 463).

	My Checkbook:Check	EE
	12/28/98 561 Poly Payroll	
K T ★	Payroll 1,749.38	

Text Editor SuperObjects allow you to edit text right in the form window—no double click is required. You can simply click or drag on the text to begin editing. Press **Enter** when you are finished. The illustration below shows the effect of double clicking on the word Poly. As you can see, instead of opening an Input Box this selects the word for editing.

12/28/98	
561	
Poly Payroll	
Patroll	

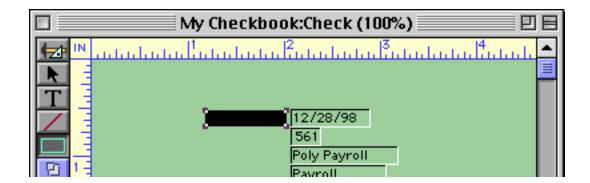
Since the Text Editor SuperObject doesn't use an Input Box, you cannot expand the size of the editing area "on-the-fly" the same way you can with data cells. The editing area must be defined in advance. On the other hand, the Text Editor SuperObject doesn't require the extra double click, and works more like other standard applications you may be used to. See "<u>Creating and Modifying Text Editor SuperObjects</u>" on page 617 to learn more about Text Editor SuperObjects. For now, however, switch the form back to Graphic Design Mode so that you can continue designing your new form.

## Dressing Up the Check Form

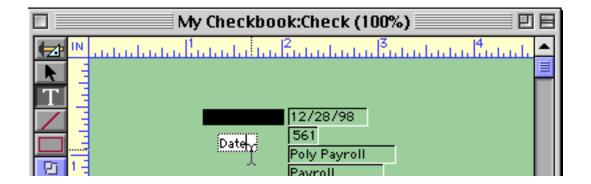
Select the **Rectangle** tool and draw a rectangle next to the check date (see "<u>Creating a Graphic Object</u>" on page 472).

My Checkbook:Check (100%) 📃 🗉 🖻
[ []]]
561
Poly Payroll Payroll

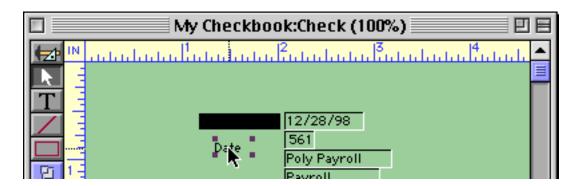
Change the **Fill Pattern** of the rectangle to solid black (see "<u>Fill Pattern</u>" on page 499).



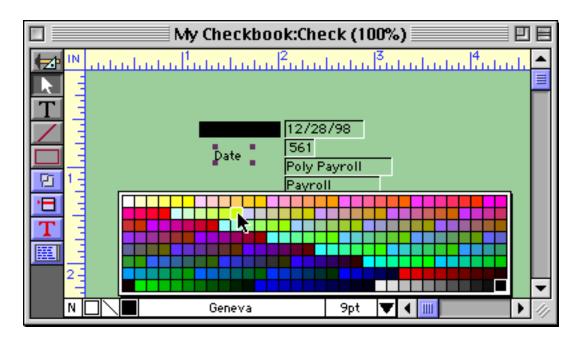
Select the Text tool and create a click-text object that says Date. (see "Fixed Text Objects" on page 565).



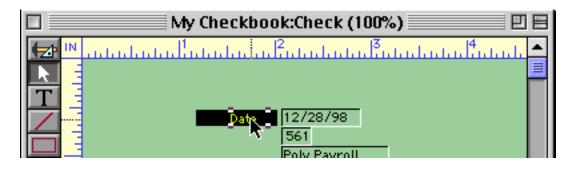
Select the **Pointer** tool and then click on the new text object.



Use the **Graphic Control Strip** to set the text color to light yellow (see "<u>Color</u>" on page 504).



Drag the text over the black box.



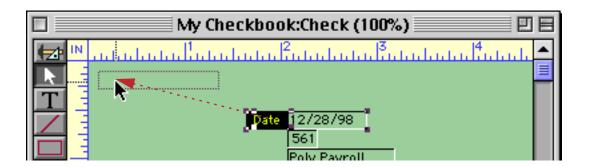
Adjust the black box and the text until they line up with the Text Editor SuperObject as shown below. To adjust these objects you can drag them (see "<u>Moving a Single Object</u>" on page 486 and "<u>Changing the Size of a Single Object</u>" on page 491) and nudge them with the arrow keys (see "<u>Nudging an Object (or Objects)</u>" on page 487 and "<u>Nudging the Size of an Object</u>" on page 491).

Date 12/28/98	
561	

Drag a marquee around these objects to select them (see "Selecting Multiple Objects at Once" on page 480).



Then drag the objects into the upper left hand corner of the form.



Now drag a marquee just around the box and text objects.

🗖 📃 My Checkbook:Check (100%) 📃 🖳	Ξ
	•
Date 12/28/98	
561	
Poly Payroll	

Hold down the **Shift** and **Option** keys on the Mac, or **Shift** and **Alt** keys on the PC. With these two keys held down drag the two objects to the right.

My Checkbook:Check (100%) 📃 📃 🗉	E
	•
Date 12/28/98	
▶	

Holding down the **Shift** key insures that you drag the objects at 90 degrees, either perfectly up and down or perfectly left and right (as in this case). Holding down the **Option/Alt** key tells Panorama to duplicate the objects. When you release the mouse you'll have two copies of these objects.

🔲 👘 My Checkbook:Check (100%) 👘 🔛	E
	•
Date 12/28/98 Date	

Select the **Text** tool and click on the new text object.

🔲 👘 My Checkbook:Check (100%) 📃 🗉		
		•
Dat	e 12/28/98 Date	≡
T		

Edit the text to say Number instead of Date.

My Checkbook:Check (100%)	
	<u>111</u>
Date 12/28/98 Number	

Select the **Pointer** tool and adjust the rectangle size to match the new text.

🔲 📃 My Checkbook:Check (100%) 📃 🗉 🗄	
	11 <sup>4</sup> 111111
Date 12/28/98 Number	

Drag the check number up next to these objects.

	My Checkbook:Check (100%) 📃 🛛 🗏	
	Date 12/28/98 Number 561	
T		
	Poly Payroll	
1	Payroll	

Using the techniques you've just learned continue re-arranging the form until it looks like this.

	My Checkbook:Check (100%) 📃 🛛 🛛	
		-
R Date		
T Pay	/ To Poly Payroll Services 🕴 1,749.38	
201-		
T		
E I		
2-		
		-
	Geneva 9pt 🔻 💷 🕨	111

Make a copy of the Pay To caption.

🗖 📃 My Checkbook:Check (100%) 📃 🛛		
		•
Date 12/28/98 Number 561 Category Payroll		
Pay To Poly Payroll Services	1,749.38	

Change the text to Memo and expand the rectangle to about 1 inch high.

My Checkbook:Check (100%)		E
	<u>uduutuul<sup>4</sup>uut</u>	<u></u>
Date 12/28/98 Number 561 Category Payr		
Pay To Poly Payroll Services     Memo	\$ 1,749.38	

Slide and resize the memo field itself into place.

	My Checkbook:Check (100%) 📃 📃 🛛	18
	<sup>™</sup>	
	Date 12/28/98 Number 561 Category Payroll	
T	Pay To Poly Payroll Services \$ 1,749.38	
/	Memo	
Ð		
•		
T		

To add a scroll bar to the memo field double click on the Text Editor SuperObject to open the object properties dialog. This dialog lets you turn various object options on and off. Click on the Vertical Scroll Bar checkbox.

	Text Editor SuperObject			
Data				
💽 Field 🚼 🔘 Variable 🔘	Formula			
Memo				
Display Options	Editing Options			
<ul> <li>Padding</li> <li>Wrap at end of line</li> <li>Non-White Background</li> </ul>	□ Padding Insertion Pt.: at End ↓ Wrap at end of line □ Tab = 4 Spaces			
Borders Top Shadow Left Solution Bottom Aqua Right Focus Ring	Terminate when: Return Tab Up/Down Arrows			
Scroll Bars Vertical Horizontal Thin Scroll Bars Grow Box	Attach Procedure to Object  Attach Procedure to Object Handler Every Key Most Keys Finished Focus			
	Cancel OK			

When you press the **OK** button the memo field gets a vertical scroll bar.

My Checkbook:Check (100%)	日日
	<u>111</u>
Date 12/28/98 Number 561 Category Payroll	
Pay To Poly Payroll Services \$ 1,749.38	

To actually use the form you must switch into Data Access Mode. Notice that the background of the field being edited turns white (in this case the memo field).

	My Checkbook:Check		EE
	Date 12/28/98 Number 561 Category Payroll		<b></b>
29	Pay To Poly Payroll Services	1,749.38	
H I I	Memo Payroll period from 12/14/98 to 12/20/98	▲ 	
₽₩₽			•
	515 visible/515 total 🛛 🚺		► 4/j

Use the **Tab** key to move from field to field.

	My Checkbook:Check		
Þ	Date 12/28/98 Number 561 Category Payroll		<b>_</b>
22	Pay To Poly Payroll Services	1,749.38	
	Memo Payroll period from 12/14/98 to 12/20/98		

### **Making the Form Elastic**

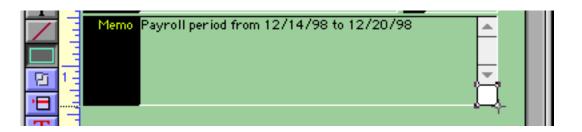
An ordinary form is fixed — it stays the same no matter what the size of the window is. By adding a single object to your form you can make it **elastic**. An elastic form adjusts automatically to fit the window — it grows when the window grows and shrinks when the window shrinks. Start by switching back to Graphic Design Mode. Then double click on the memo field to open the object properties dialog.

	Text Editor SuperObject
_ Data	
💿 Field 😫 🔘 Variable 🔘 I	Formula
Memo	
Display Options	_ Editing Options
<ul> <li>Padding</li> <li>Wrap at end of line</li> <li>Non-White Background</li> </ul>	Insertion Pt.: at End Tab = 4 Spaces Update Variable Every Key
Borders Top Shadow Left Solution Bottom Aqua Right Focus Ring	Terminate when: Return Tab Up/Down Arrows
Scroll Bars Vertical Horizontal Thin Scroll Bars Grow Box	Attach Procedure to Object  Attach Procedure to Object Handler  Every Key Most Keys Finished Focus
	Cancel OK

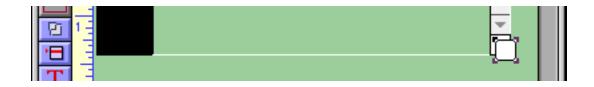
Turn on the Grow Box option, then press the OK button. The memo field now reserves a spot for the window's grow box.

My Checkbook:Check (100%)	日日	
	1. 🔺	
Date 12/28/98 Number 561 Category Payroll		
Pay To Poly Payroll Services \$ 1,749.38		
Memo Payroll period from 12/14/98 to 12/20/98		
		corner reserved
		for grow box
		1

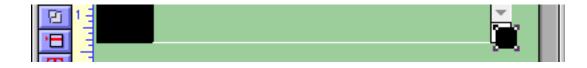
Using the **Rectangle** tool draw a box in the spot reserved for the grow box.



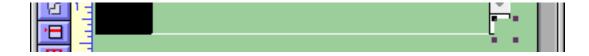
Using the **Duplicate** command in the Edit menu, make a copy of the box (see "<u>Duplicate</u>" on page 539).



Set the Fill Pattern of the new box to solid black (see "Fill Pattern" on page 499).



Set the color of the new box to the same green color as the background (see "<u>Color</u>" on page 504).



Use the arrow keys to nudge the green box until it covers the white area but leaves the black border.

ŀ.	

Now to make the form elastic. Start by selecting the **Auto Grow** tool. (If you can't find the **Auto Grow** tool you need to customize the tool palette. See "<u>Customizing the Tool Palette</u>" on page 475.)

🔲 👘 My Checkbook:Check (100%) 👘 🛛	]8
Date 12/28/98 Number 561 Category Payroll	
Pay To         Poly Payroll Services         \$ 1,749.38	F
Memo Payroll period from 12/14/98 to 12/20/98	
Auto Grow	
T	

Starting from the bottom right hand corner of the form, drag the mouse up and to the left. Release the mouse somewhere between the left edge of the Category field and the right edge of the Pay To field, as shown in the illustration below. (The blue and green lines in the illustration below have been added to highlight the location of these edges.)

My Checkbook:Check (100%)	Ξ
Date 12/28/98 Number 561 Category Payroll	
Pay To Poly Payroll Services \$ 1,749.38	
Memo Payroll period from 12/14/98 to 12/20/98	

When you release the mouse the **Auto Grow** configuration dialog appears. The dialog is already filled out for you except that you need to turn on the **Draw Grow Icon** checkbox.

Elastic Form Configuration			
Window Size		Options	
Minimum Height: Width: Match This C		Slave (Horizontal)	
Match This Object  Match This Object  Match This Object  Cancel OK			

Press the **OK** button to finish creating this object.

	My Checkbook:Check (100%) 📃 🗉 🗄	Ξ
	Date 12/28/98 Number 561 Category Payroll	
片	Date         12/28/98         Number         561         Category         Payroll           Pay To         Poly Payroll Services         \$ 1,749.38	
	Memo Payroll period from 12/14/98 to 12/20/98	
T	7 I	
	/ auto-grow object	

The auto-grow object is covering up some of the memo field. To fix this use the **Send To Back** command in the Arrange menu (see "<u>Changing the Stacking Order</u>" on page 547).

My Checkbook:Check (100%)	
	. 🔺
Date 12/28/98 Number 561 Category Payroll	
Pay To Poly Payroll Services \$ 1,749.38	
Memo Payroll period from 12/14/98 to 12/20/98	

When you switch the form to Data Access Mode the auto-grow object completely disappears.

	My Checkbook:Check	
	Date 12/28/98 Number 561 Category Payroll	<b>^</b>
2	Pay To Poly Payroll Services \$ 1,749.38	=
	Memo Payroll period from 12/14/98 to 12/20/98	
Ŧ		
Ē		
<u></u>		
Å		
		-
	515 visible/515 total 🛛 🖣 🎹	<ul> <li>1/1</li> </ul>

But the real fun starts when you adjust the size of the window. The form adjusts automatically to the new size! See "<u>Elastic Forms</u>" on page 900 for a complete explanation of how this magic works.

My Checkbook:Check		P	
Date 12/28/98 Number 561 Category Payroll			
Pay To Poly Payroll Services	\$	1,749.38	
Memo Payroll period from 12/14/98 to 12/20/98	•••••	· · · · · · · · · · · · · · · · · · ·	
515 visible/515 total 🛛 🖣 🎹		Þ	14

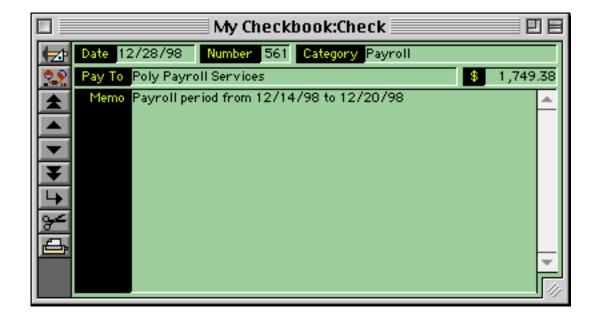
To get rid of the extra scroll bars and tool palette choose the **Window Tweak** command from the Form Tools submenu of the Wizard menu (see "<u>Turning Window Components On and Off (Window Tweak Wizard)</u>" on page 170).

My Checkbook:Check	
Date 12/28/98 Number 561 Category Payroll	
Pay To Poly Payroll Services	\$ 1,749.38
Memo Payroll period from 12/14/98 to 12/20/98	▲ ▼

In this case you may want to use the tool palette. To get it back uncheck the Tool Palette option in the Window Tweak window.

\varTheta \varTheta (	🔵 Window Tweak
TWEAK	■ Tool Palette ✓ Vertical Scroll Bar ✓ Horizontal Scroll Bar

Then press the **Tweak** button twice. Here's the final result.



Oh yeah, one more thing. You have been remembering to Save, right? Well, go for it now, and you're done.

# Lesson 3: Building an Invoice Database

Now that you've mastered basic skills in building databases, forms and procedures you're ready to tackle a more complicated task. Organizing invoices (or similar forms like statements, purchases, quotes, expense reports etc.) is one of the most common jobs performed by database programs. Just as with the other two databases you'll start by launching Panorama and the **New Database Wizard**.

00					New Database	Wizard				
<b>S</b> TEMPLATES	+ ADD FIELD	IMPORT TEXT FILE	HAKE NEW DATABASE		OPEN	OPEN FAVORITE		AGBE EF G OPEN EXAMPLE		PREFS
Fields					Quick Reference					
A				Ť	Enter each field Numeric fields m \$ (money) or . ( Date fields must	ust end with floating point	# (integer) )	(Qty#, Pri	t., etc.)	

Instead of building this database from scratch you're going to use the pre-built Invoice template. To do this click on the **Templates** tool.

	Choose Tem	iplate
Blank		Simple Invoice
Ten Generic Fields		
Mailing List		tes a simple invoice database. The name and address are all st stuff. The invoice has four repeating line item fields: QtyΩ,
Contacts (Basic)		AmountΩ. When the database is generated these will be interface of $\Omega$ and $\Omega$ by $\Omega$ by $\Omega$ by $\Omega$ by $\Omega$ by $\Omega$ by $\Omega$ .
Contacts (Advanced)		iple fields, Qty1, Qty2, Qty3, Item1, Item2, Item3, etc. You can of line items generated with the box below, the default is six.
Checkbook	For each line itera	
Expense Report		you enter a quantity (Qty1, Qty2, Qty3, etc.) a description .) and a price (Price1, Price2, etc.). The formulas are set up to
Phone Log		ulate the total for each line item (Amount1, Amount2, Amount3
To-Do List		tal, tax, and grand total. You can enter the shipping manually, hange the tax rate.
Time Card	The data should be	af this database is some stackabled and the source it such the materia
Time Card 2		w of this database is very stretched out, so you'll want to make nore like a regular invoice. For information about how to do this
Price List	quickly see Chapter Panorama Handboo	r 5 (Fields) and Chapter 15 (Displaying and Editing Text) in the
Price List (Discount)	Fallor allia Halidooo	ĸ.
Invoice		
Parts and Labor Invoice		
Product Inventory		
Equipment Inventory	7	
Build Database Now		Cancel Choose

Click on Invoice then press the Choose button.

When you select this template the wizard will call up a list of definitions for the twenty fields required for an invoice, including default values and calculations.

$\bigcirc \bigcirc \bigcirc \bigcirc$	New Database Wizard				
TEMPLATES ADD IMPORT HAKE NEW	OPEN OPEN OPEN OPEN OPEN OPEN LOGON PRI	) (			
Fields (Invoice)	Quick Reference				
Num #=+1 Date=today Name Company Address City State Zip Country	Enter each field name on a separate line       (Name, Description, Phone, etc.)         Numeric fields must end with # (integer),       (Qty #, Price\$, Weight., etc.)         \$ (money) or . (floating point)       Date fields must have date in the name       (Date, CheckDate, InvoiceDate, etc.)         To specify default value use =value       (Country=USA, City=" [ditto], Invoice#=+, Date=today)         To assign a calculation use =(formula)       Total\$=(Subtotal+Shipping+Tax) Amount\$=(Qty*Price)				
Phone Memo QtyQ#	Notes/Instructions				
ItemΩ PriceΩ\$ AmountΩ\$=(QtyΩ*PriceΩ) SubTotal\$=(sum("AmountΩ")) TaxRate.=7.75 Tax\$=(TaxRate*SubTotal/100) Shipping\$=5.00 Total\$=(SubTotal+Tax+Shipping)	New Database Wizard To create a new database, simply enter the names of the fields you want to create in the box to the left, one field per line. You can start with the blank form shown here, or start by selecting a pre-built template from Template menu (at the top of this window). After the fields names are entered press the Make New Database button.				
Number of Line Item (Ω) Fields: 6	To create a new database from a tab or comma delimited text file, press the Import Text File button and select the file. The first line of the file will appear in the box to the left - one field per line. If the first line of the text file contains the field names, just press the Make New Database button to create the database and import the data. If the first line contains data, simply replace each data item with the name you want to use for the field. Don't add or remove any lines. You can also add suffixes for numeric fields, default values and calculations (see below).				

By default the wizard will create a database that allows up to six **line items** per invoice. Let's increase this to twelve line items per invoice.

Memo $Qty\Omega^{\#}$ $Item\Omega$ $Price\Omega$ $Amount\Omega$ subTotal $(Qty\Omega^{Price}\Omega)$ SubTotal SubTotal $(Sum("Amount\Omega"))$ TaxRate.=7.75 Tax Tax (TaxRate *SubTotal/100) Shipping =5.00 Total (SubTotal+Tax+Shipping)	Notes/Instructions  New Database Wizard  To create a new database, simply enter the names of the fields you want to create in the box to the left, one field per line. You can start with the blank form shown here, or start by selecting a pre-built template from Template menu (at the top of this window). After the fields names are entered press the Make New Database button.	•
Number of Line Item (Ω) Fields: 12	Importing a Text File To create a new database from a tab or comma delimited text file, press the Import Text File button and select the file. The first line of the file will appear in the box to the left - one field per line. If the first line of the text file contains the field names, just press the Make New Database button to create the database and import the data. If the first line contains data, simply replace each data item with the name you want to use for the field. Don't add or remove any lines. You can also add suffixes for numeric fields, default values and calculations (see below).	

Number of line items per record

Press the Make New Database tool to actually create the database. The new database has so many fields that we can only see a small portion of them at once using the data sheet.

) 🖯 🤇	)			Untitled				
Num	Date	Name	Company	Address	City	State	Zip	Countr
2	09/27/0							
~								
1								
3								
<u> </u>								

Before going any further you should **Save** the new database. Give it the name My Invoices and save it in the same folder as your first two databases. Be sure to check the **Save Window Positions** option in the **Save As** dialog.

#### **Line Item Fields**

The New Database Wizard invoice template contained 20 fields. However, if you look in the design sheet (use the **View** menu) you will see that the database actually contains 64 fields.

Field Name	Туре	Digits	Align	Output P	Input Pattern	Range	Chc	Link	Clair	Tab	Caps	Dup	Default	Equation
Num	Numenio	0	Right	<i>*</i> .		Any			Off	Off	Off	Yes	+1	
Date	Date	0	Left	í.		Any			Off	Off			today	
Name	Text	0	Left			Any			Off		Word			
Company	Text	0	Left			Any			Off		Word			
Address	Text	Ō	Left			Any			Off		Word			
City	Text	Ō	Left			Any			Off		Word			
State	Text	Ō	Left			Any			Off	Off		Yes		
Zip	Text	ō	Left			Any			Off	Off		Yes		
Country	Text	ō	Left			Any			Off		Word			
Phone	Text	õ	Left		()	Any			Off	Off		Yes		
Merno	Text	ŏ	Left		·	Any			Off	Off		Yes		
Qty1	Numeric		Right	#		Any			Off	Off		Yes		
Item1	Text	ŏ	Left	· ·		Any			Off	Off		Yes		
Price1	Numeric		Right	*,**		Any			Off	Off		Yes		
Amount1	Numeric			***		Any			Off	Off		Yes		QtyΩ*PriceΩ
Qty2	Numeric		Right			Any			Off	Off		Yes		wysternioest
Item2	Text	0	Left	1		Any			Off	Off		Yes		
Price2	Numeric		Right	*,.**		Any			Off	Off		Yes		
Amount2	Numeric			***		Any			Off	Off		Yes		QtyΩ*PriceΩ
Qty3	Numeric		Right			Any			Off	Off		Yes		wtyszownicesz
Item3	Text	0	Left	· ,		Any			Off	Off		Yes		
Price3	Numerio			*,.**					Off	Off		Yes		
Amount3	Numeric			*,**		Any			Off	Off		Yes		QtyΩ*PriceΩ
	Numeric		Right			Any			Off	Off		Yes		Qtys2APTices2
Qty4 Item4	Text	0	Left	<i>",</i>		Any			Off	Off		Yes		
Price4	Numeric			*,.**		Any				Off		Yes		
				*,**		Any			Off	Off				040-*00
Amount4 Qty5	Numeric Numeric		Right			Any			Off Off	Off		Yes Yes		QtyΩ*PriceΩ
wiyo	Numerio	0	Kigitt	, ,		Any			011	on	011	162		
Qtv10	Numeric	0	Right	*.		Any			Off	Off	Off	Yes		
Item10	Text	ō	Left	,		Any			Off	Off	Off	Yes		
Price10	Numeric			***		Any			Off	Off		Yes		
Amount10	Numeric					Any			Off	Off		Yes		QtyΩ*PriceΩ
Qty11	Numerio		Right			Any			Off	Off		Yes		
Item11	Text	ŏ	Left	<i>'</i>		Any			Off	Off		Yes		
Price11	Numerio			***		Any			Off	Off		Yes		
Amount11	Numeric					Any			Off	Off		Yes		QtyΩ*PriceΩ
Qty12	Numeric		Right			Any			Off	Off		Yes		wyr i'r roer
Item12	Text	õ	Left	'		Any			Off	Off		Yes		
Price12	Numeric			***		Any			Off	Off		Yes		
Amount12	Numeric			· ·		Any			Off		Off	Yes		QtyΩ*PriceΩ
SubTotal	Numeric					Any			Off	Off		Yes		Amount1+Amount2+Am
TaxRate	Numeric			. P					Off		Off		7.75	Amount + Amount2+ Am
	Numeric			# ##		Any							1.15	TaxRate*SubTotal/100
Tax						Any			Off	Off		Yes	5.00	raxitate^SubTotal/100
Shipping	Numeric					Any			Off		Off		5.00	SubTatal4 Taux Objector
Total	Numeric	rioat	Right	· . · · · ·		Any			Off	UTT	Off	Yes		SubTotal+Tax+Shipping

The solution to this is that four of the fields in the template,  $Qty\Omega$ ,  $Item\Omega$ ,  $Price\Omega$  and  $Amount\Omega$ , are actually a special kind of field called line item fields. The wizard expanded each of these into 12 fields, Qty1, Qty2, Qty2, etc., Item1, Item2, Item3, etc. This allows the invoice to contain information about up to 12 separate items. It's difficult to work with so many fields in the data sheet view, so you'll create a form that allows you to display and edit the data in a format that looks like a traditional paper invoice.

# **Creating an Invoice Form**

You already know how to create a new form, so make one named Order Entry. There's no need to open it in a separate window, you won't be needing the data sheet again.

Create New Form						
New Form Name:	lnsert before:					
Order Entry	•					
Cancel Blank Form	Quick Label Quick Report					

Using the techniques you've learned make the form look like the illustration below. If you need to review these techniques see "<u>Creating a Data Entry Form</u>" on page 57 and "<u>Drawing a Check Form</u>" on page 156. You may find it easier to switch the rulers to **pixels** instead of inches as shown in the illustration below, see "<u>Rulers</u>" on page 484 to learn how to do this.

rectangle					
l cli	ck text object				
	da	ta cell			
		/			
		My Invoic	es:Order Entry (100%)		
		0 180 200 220		80 400 420 440 460 480 500 520 5	
Invoi	ce # Num Date Date				
	lame Name				
	pany Company				
	ress Address		`pixels		
CELL 60	City	Sta Zip	-		
T 80 Cou	City ntry Country	Sta Zip	-		
P	hone Phone				
Hemo					
20 Memo					
TILE 60					
60 80					
			✓ all text is 9 poi	int	
<u></u>			-		
20					
40					-
	Geneva	9pt	×Opt yOpt ∆×Opt ∆yOpt		▶ ///

#### Adding Line Items to the Form

The heart of the order entry form is the line items. This section of the form will contain 56 objects — 48 data cells (4 columns by 12 rows) plus 4 text objects and 4 rectangles for column captions. Fortunately the **Auto Cell Layout** dialog will create most of these objects for you automatically. You're going to create the line items in the blank area to the right of the objects you've already created. Start making sure that black is the currently selected color (see "<u>Color</u>" on page 504), then click the mouse in the upper left hand corner of this blank area.

					N	/ty Invoice	s:Order Entry (100%) 📃 📃	
	PIX	20  40	60 80	100 120	140 160 1	80 200 220 2	40 260 280 300 320 340 360 380 400 420 440 460 480 500 520 540 560 .	
R		Invoice #	Num	Date	Date			
	20	Name	Name					
	20	Company I	Company					

Now choose the **Auto Cell Layout** command from the Arrange menu. You've seen this dialog before. Since we want to create line items press the **Line Items** button. This selects all of the line item fields.

			đ. De wett
Select All Fields	Line Items	Layout:	🗹 Across 📃 Same Width
Num	4		1 Object Height (Lines)
Date	<u>×</u>		Constitute (Discula)
Name	m		0 Spacing (Pixels)
Company		Extras:	🗹 Field Names 📃 Boxes
Address			
City State		SuperObject:	⊟ Create SuperObjects™
Zip		Borders:	🗌 Top 📃 Left
Country			Bottom Right
Phone			Shadow 3D
Memo		Formatting	✓ Wrap at end of line
Qty1		ronnatting.	Non-White Background
ltem1		Townshield	
Price1		Term when:	Return Tab
Amount1			Up/Down Arrows
Qty2	À V		
ltem2	+		(Cancel) (OK)

You don't need to change any of the other options, just press the OK button. Panorama will automatically create all 48 data cells you need in 12 rows by 4 columns.

		My Inv	oice	s:Order Entry (1	100%)	ſ	日日
	20 40 60 80 10012014016	0 180 200	2202	240 260 280 300 320	340 360 3	80 400 420 440 460 480 500 520 540 5	i60 🔺
R	Invoice # Num Date Date			Qtvitem1		Amount1	
	Name Name			Qtyİtem1		Amount1	
	Company Company			Qtyltem2		Amount2	
<b>4</b> 0	Address Address			Qty Item3		Amount3	
CELL 60				Qtyltem4		Amount4	
	City	Sta	Zip	Qtyltem5		Amount5	
80	Country Country			Qtyltem6		Amount6	
	Phone Phone			Qtyltem7		Amount7	
	Memo			Qtylitem8 Qtylitem9		Amount8 Amount9	
	Memo			Qtyltem10	Price10		
				Qtyltem11	Price11		
O <sup>40</sup>				Oty Item12	Price12		
080							
20							
40							
<b>40</b>		· ·					
	Geneva	9pt		×Opt yOpt ∆×Opt ∆y	yOpt		14

You'll need to make some adjustments to make the line items look right in your invoice. Start by choosing the **Spacing** command in the Edit menu (see "<u>Adjusting Spacing Between Multiple Objects</u>" on page 534).

Adjust Object Spacing						
Direction						
💽 Vertical 🛛 🔘 Horizontal						
_ Space Between Objects						
1 pixels						
Cancel OK						

Click the Vertical option and type in 1 for the pixel spacing. Then press **OK** to adjust the vertical spacing between the lines. There is now one pixel in between each line.

	🛛 👘 My Invoices:Order Entry (100%) 👘 🖳 🔛 🔛							
PIX 20 40 6	0  80  100 120 140 160 18	80 200 220 2		0 340 360 380 400 420 440 4				
	Num Date Date			Price1 Amount1	=			
Name Na	ime		Qtyjtem1	Price1 Amount1				
Company Co	mpany		Qty item2	Price2 Amount2				
🔍 40 Address Ad	ldress		Qty Item3	Price3 Amount3				
CELL 60			Qtyjtem4	Price4 Amount4				
Ci	ty	Sta Zip	Qty item5	Price5 Amount5				
BO Country Co	ountry		Qty tem6	Price6 Amount6				
Phone Ph	ione		Qtyitem7	Price7 Amount7				
60 Memo			Qty item8	Price8 Amount8				
20 Memo			Qtyltem9	Price9 Amount9				
			Qty item10	Price10 Amount1				
			Qty item11	Price11 Amount1				
			Qty item12	Price12 Amount1				

Next you'll want to adjust the width of the columns, starting with the Item column. To adjust the width, move the mouse over the lower right hand handle of one of the objects in the column, then press and drag to the right. Hold down the **Shift** key to make sure that you don't change the height of the object, only the width. If you hold down the S key (the letter S) you don't have to exactly press on the handle itself, anywhere close to the bottom right hand corner of the object will do (see "<u>Resizing Without Handles</u>" on page 494).

			My In	voice	s:Ord	ler Entry (	(100%)					- 2 B
	20 40 60 80	100 120 140	160 180 20	02202	40 260	280 300 32	0 340 360 3	80 400 420	1440 41	60 480 5	500 520 5	40 560 🔺
	Invoice <b>#</b> Num	Date D	ate		Qtvit			Amount1				
20	Name Name				Qtyli		Price1	Amount1				
20	Company Company				Qtyli	tem2	Price2	Amount2				
<b>4</b> 0	Address Address				Qtyli	tem3	Price3	Amount3				
CELL 60			<u> </u>		Qtyli	tem4	Price4	Amount4				
<b>₩</b>	City		Sta	Zip	Qtyli	tem5	📋 Price5	Amount5				
80	Country Country				Qtyli	tem6	Price6	Amount6				
	Phone Phone				Qtyli	tem7	Price7	Amount7				
- 00 Me	emo				Qtyli	tem8	Price8	Amount8				
20 Mer	mo				Qtyli	tem9	Price9	Amount9				
					Qtyli	tem10	Price10	Amount1				
					Qtyli	tem11	Price11	Amount1				
					Qtyl	tem12	Price12	Amount1				
						-		12 12				
08												

When you release the mouse all of the selected objects will adjust to the new width (see "<u>Cluster Resize</u>" on page 519).

	My Invoices:Order Entry (100%)							
PIX PIX	20  40  60  80  100	1201401601	80 200 22	0 240	260 280 300 320 3	40 360 380 400 420	440 460 480 500	
	Invoice # Num Da	ate Date		0	tv/item1	Price1	Amount1	=
20	Name Name			Ω	t <u>y</u> [tem1		Amount1	
20	Company Company			Ω	t <u>y İ</u> tem2	Price2	Amount2	
40	Address Address			ĮΦ	t <u>y</u> įtem3	📜 Price3	Amount3	
CELL 60					t <u>y</u> įtem4		Amount4	
	City		Sta Zip	_	t <u>y</u> item5		Amount5	
80	Country Country			_[Q	t <u>y</u> įtem6	📜 Price6	Amount6	
	Phone Phone			_[Q	t <u>y</u> įtem7		Amount7	
	1emo			_ [Q	t <u>y</u> įtem8	📜 🗍 Price8	Amount8	
20 ×	1emo				t <u>y </u> item9		Amount9	
					t <u>y</u> įtem10		Amount1	
					tyjitem11		Amount1	
TTEE 60				Q.	tyjtem12	] Price12	Amount1	
80								

Repeat as necessary until all the widths look the way you want. You can also nudge the widths with the arrow keys for fine adjustments (after dragging the width, see "<u>Nudging the Size of an Object</u>" on page 491).

	🗖 🐘 My Invoices:Order Entry (100%) 📃 📃 📃								
	20 40 60 80 10012	0 140 160 180 200 220	240 260 280 300 320 340 360 3	80 400 420 440 460 480 500 520 540	560 🔺				
	Invoice # Num Date	Date	Qtv1item1	Price1: Amount1					
	Name Name		Qty1 item1	Price1 Amount1					
20	Company Company		Qty2jtem2	Price2 Amount2					
40	Address Address		Qty3 tem3	Price3 Amount3					
CELL CO			Qty4 item4	Price4 Amount4					
<u>₩</u> 60	City	Sta Zip	Qty5jtem5	Price5 Amount5					
80	Country Country		Qty6 item6	Price6 Amount6					
	Phone Phone		Qty7 item7	Price7 Amount7					
	Memo		Qty8 tem8	Price8 Amount8					
	Memo		Qty9 tem9	Price9 Amount9					
			Qty1 item10	Price10 Amount10					
			Qty1 item11	Price11 Amount11					
			Qty1 tem12	Price 12 Amount 12					
<b>6</b> 80									

While holding down the **Option** key (Macintosh) or **Alt** key (PC) drag the small purple rectangle next to the **Date** cell over the **Qty1** text.

		M	ly Invoices:Order Entry (100	0%) 日日
	20 40 60 80	100 120 140 160 1	80 200 220 240 <b> </b> 260 280 300 320 34	0 360 380 400 420 440 460 480 500 520 540 560
	Invoice # Num	Date Date	ttore wylitem1	Price1: Amount1
	Name Name		Qkg1 jtem 1	Price1 Amount1
20	Company Company		Oty2litem2	Price2 Amount2

When you release the mouse there will be a new purple rectangle covering the text.

	My Invoice	es:Order Entry (100%)	
PIX PIX	20 40 60 80 1001201401601802002202	240 260 280 300 320 340 360 380 400 420 440 460 480 500 520 540	560 🔺
	Invoice # Num Date Date	Price1: Amount1	
20	Name Name	Qty Item1 Price1 Amount1	
	Company Company	Qty2 Item2 Price2 Amount2	

Adjust this rectangle so that it exactly covers the Qty1 text (see "Nudging the Size of an Object" on page 491).

		My Invoices:Order Entry (100%)	ÐE
	20  40  60  80  100 120 140 160	180 200 220 240 260 280 300 320 340 360 38	80 400 420 440 460 480 500 520 540 560
	Invoice # Num Date Date	tem1	Price1: Amount1:
	Name Name	Qty1 2m1	Price1 Amount1
20	Company Company	Qty2 item2	Price2 Amount2

While holding down the **Shift** key and the **Option** key (Mac) or **Alt** key (PC) drag this rectangle to the right over the Item1 text.

	My	Invoices:Order Entry (100%)	
	20 40 60 80 100120140160180	1200 220 240 260 280 300 320 340 36	0 380 400 420 440 460 480 500 520 540 560 🔺
	Invoice # Num Date Date		i Priceli Amountli 📃
20	Name Name	Qty1 iteñi	Price1 Amount1
20	Company Company	Qty2 Item2	Price2 Amount2

Adjust this new rectangle so that it covers the Item1 text.

My Invoices	:Order Entry (100%) 📃 🗏 🗏
, PIX 20  40  60  80  100 120 140 160 180 200 220 24	0 260 280 300 320 340 360 380 400 420 440 460 480 500 520 540 560
Invoice # Num Date Date	📃 📕 Price 1: Amount 1:
 Name Name	Qty1 item1 Price1 Amount1
	Qty2 Item2 Price2 Amount2

Repeat for the Price and Amount columns.

	My Invoice	s:Order Entry (100%)	
PIX PIX	20 40 60 80 1001201401601802002202	240 260 280 300 320 340 360 380 400	420 440 460 480 500 520 540 560
	Invoice # Num Date Date		
20	Name Name	Qty1 Item1	Price1 Amount
20	Company Company	Qty2 tem2	Price2 Amount2

While holding down the **Shift** key, click on each of the four purple rectangles you just created. This selects all four objects (see "<u>Selecting Multiple Objects at Once</u>" on page 480).

hold down SHIFT key and click on each object you want to select

My Invoid	es:Order Entry (100%)	
20  40  60  80  100 120 140 160 180 200 220 Invoice # Num Date Date		00420144014601480 500152015401560
 Name Name Company Company	Qty <sup>h</sup> \$tem1 Qty2 tem2	Price1 Amount1 Price2 Amount2

Now choose the Send to Back command from the Arrange menu (see "<u>Changing the Stacking Order</u>" on page 547).

Arrange	
Bring to Front	<b>%=</b>
Send to Back	ж-
Group	₩G
Ungroup	

Using this command moves the four purple rectangles behind the four text objects, making the text objects visible again (see "<u>Overlapping Objects</u>" on page 546).

	My Invoice	es:Order Entry (100%)	
	20 40 60 80 100120140160180200220	240 260 280 300 320 340 360 380 400	420 440 460 480 500 520 540 560
	Invoice # Num Date Date	(0tv1)tem1	Price fill Amount 1
20	Name Name	Qty1 item1	Price1 Amount1
20	Company Company	Qty2 tem2	Price2 Amount2

Because the text objects are black on a purple background they aren't very easy to see. To change that, start by clicking on an empty spot on the form. Clicking on an empty spot makes sure that the four purple rectangles are no longer selected.

	My Invoices:Order Entry (100%	)
PIX 20 40 60 80 100	120 140 160 180 200 220 240 260 280 300 320 340 30	60 380 400 420 440 460 480 500 520 540 560
📄 📐 🔤 Invoice 🗮 Num 🛛 Da		En Price i a Amounti 📃 📃
Name Name	Qty1 Item1	Price1 Amount1 🖌 😽
Company Company	Oty2litero2	Price2 Amount2

click on any empty spot to make sure that no objects are selected

Now hold down the **Shift** key and click on each of the four text objects. With the four objects selected change the color to light blue to match the other caption text (see "<u>Color</u>" on page 504).

hold down SHIFT key and click on each object you want to select

		My Invoice	es:Order Entry (100%)		
PIX 20 40	60 80 1001201401	-		880 400 420 440 460 480 500 520 54	
Invoice *	Num Date Date		Oty Ditem 1	Price ( Amount )	
20 Name	Name		Qty1 item1	Price1 Amount1	
Company	Company		Qty2 Item2	Price2 Amount2	
40 Address	Address		Qty3 Item3	Price3 Amount3	
CELL 60			Qty4 Item4	Price4 Amount4	
	City	Sta Zip	Qty5 tem5	Price5 Amount5	
	Country		Qty6 Item6	Price6 Amount6	
	Phone		Qty7 Item7	Price7 Amount7	
memo			Qty8 Item8	Price8 Amount8	
20 Memo			Qty9 Item9	Price9 Amount9	
			Qty1 Item10	Price10 Amount10	
			Qty1 Item11	Price11 Amount11	
TTLE 60			Qty1 Item12	Price12 Amount12	
					ł
	Geneva	9pt :	×469pt y3pt ∆×50pt ∆y12pt		▶ 4//

The text will turn light blue, almost white.

	My	Invoices:Order Entry (100%)	
	20 40 60 80 100120140160180	200 220 240 260 280 300 320 340 360 380	400 420 440 460 480 500 520 540 560 🔺
	Invoice # Num Date Date	Qty1 tem1	Price1 Amount1)
20	Name Name	Qty1 item1	Price1 Amount1
20	Company Company	Qty2 Item2	Price2 Amount2

The annoying white border around the text objects is because these are auto-wrap text objects (see "<u>Fixed</u> <u>Text Objects</u>" on page 565). The border will go away when you switch to Data Access Mode. However, we are going to convert these objects from Auto Wrap text into Click text. To do this drag the lower right hand handle of the object up over the upper right hand handle (see "<u>Moving and Resizing Fixed Text Objects</u>" on page 568).



When you release the mouse the text is converted into click text, and the annoying border disappears.

20 40 60 80 10012014016018020022024026028030032034036038040042044046048050	
Invoice # Num Date Date Qtv1 tem1 Price1 Amount	
Name Name Price 1 Amount	

converted to click text

Repeat this conversions for each of these four objects.

🗌 👘 My Invoices:Order Entry (100%) 👘 🖳 🔛 🔛								
PIX	20 40 60 80	100120140160180200220	240 260 280 300 320 340 360 380 40	0 420 440 460 480 500 520 540 560 🔺				
	Invoice # Num	Date Date	Qty1 Item1	Price1 Amount1				

Now select the **Text** tool and edit the text to remove the 1 from the end of each object.

		My	Invoices:Order Entry (100%	,) 📃 🗉	Ш
	20 40 60 80	100 120 140 160 180	200 220 240 260 280 300 320 340 3	60 380 400 420 440 460 480 500 \$20 540 560	
<b>N</b>	Invoice # Num	Date Date	QtyItem	Price Amount1	$\equiv$
20	Name Name		Qty1 Item1	Price1 Amount1 😽	

Switch back to the **Pointer** tool and drag a marquee around all of the line item objects (see "<u>Selecting Multiple</u> <u>Objects at Once</u>" on page 480). Because of the arrangement of objects in the form it is probably easiest to do this from the bottom right to the upper left.

My Invoices:Order Entry (100%)											
PIX 20 40 60 80 10012014016018020022	240 260 280 300 320 340 360 380 400	420 440 460 480	500 520 540 560 🔺								
Invoice # Num Date Date	Qtyltem	Phice Amo	ount								
Name Name	Qty1 Item1	Price1 Amou	nt1								
Company Company	Qty2 Item2	Price2 Amou	nt2								
Q 40 Address Address	Qty3 Item3	Price3 Amou	nt3								
	Qty4 Item4	Price4 Amou	nt4								
City Sta Zip	Qty5 Item5	Price5 Amou	nt5								
80 Country Country	Qty6 Item6	Price6 Amou	int6								
Phone Phone	Qty7Item7	Price7 Amou	nt7								
Memo Memo	Qty8Item8	Price8 Amou	nt8								
20 Memo	Qty9Item9	Price9 Amou	nt9								
	Qty1 Item10	Price10 Amoun	t10								
	Qty1 Item11	Price11 Amoun	t11								
<b>1 1 1 1 1 1 1 1 1 1</b>	Qty1 Item12	Price12 Amoun	t12								

Now nudge the objects into alignment with the objects on the left hand side of the form (see "<u>Nudging an</u> <u>Object (or Objects)</u>" on page 487).

	] My Invoices:Order Entry (100%)											
	20  40  60  80  1	100 120 140 16	0 180 20	0 220 2	240 260 280 300 320 340 3	560 380 400 420 440 40	50 480 500 5	520 540 560 🔺				
l In	voice # Num	Date Date			Qty Item	Price	Amount					
20	Name Name				Qty1 item1	Price1	Amount1					
20 C	ompany Company				Qty2 item2	📜 Price2	Amount2					
40 /	Address Address				Qty3 item3	📜 Price3	Amount3					
CELL					Qty4 item4	📜 Price4	Amount4					
<u>⊫</u> 60	City		Sta	Zip	Qty5jtem5	📜 Price5	Amount5					
80 (	Country Country				Qty6 item6	📜 Price6	Amount6					
	Phone Phone				Qty7jtem7	📜 Price7	Amount7					
Comment Merry	no				Qty8jtem8	📜 Price8	Amount8					
20 Mem	10				Qty9jtem9		Amount9					
					Qty1 item10	📜 Price1Q	Amount10					
					Qty1 item11	[ Price11]	Amount11					
60					Qty1 tem12	] Price12	Amount12					

Now you need to create the data cells for the subtotal, tax, shipping and grand total. Start by clicking on an empty spot on the form (to make sure no objects are selected) and then drag a marquee around the Amount9 through Amount12 data cells.

Phone Phone	Wty / Ittem /	Price7 Amount7
Memo	Qty8 Item8	Price
20 Memo	Qty9 Item9	Price Amount9
	Qty1 Item10	Price 10 Amount 10
	Qty1 Item11	Price11 Amount11
1 mm 60	Qty1 Item12	Price12 Amount12

While holding down the **Shift** key and the **Option** key (Mac) or **Alt** key (PC) drag these four rectangles down below the other line items (see "<u>Drag Duplicating</u>" on page 539).

Page 189

Memo	Qty8 Item8	Price8 Amount8
20 Memo	Qty9 tem9	Price9 Amount9
	Qty1 Item10	Price10 Amount10
	Qty1 item11	Price11 Amount11
	Qty1  tem12	Price12 Amount12
		Amount9
		Amount10
		Amount11
		Amount12
20		

Use the up arrow key to nudge the objects so that they are snuggled up with the Amount12 cell, then select the **Data Cell** tool.

	My Invo	ices:Order Entry (100%)		EB
PIX 20 40 60 80 10012014016	0 180 200 2	20 240 260 280 300 320 340 360	1380 400 420 440 460 480 500 520 5	40 560 🔺
Invoice # Num Date Date		Qty Item	Price Amount	=
Name Name		Qty1 Item1	Price1 Amount1	
Company Company		Qty2 Item2	Price2 Amount2	
40 Address Address		Qty3Item3	Price3 Amount3	
📖 Data Cell		Qty4 Item4	Price4 Amount4	
City	Sta Z	ip Qty5Item5	Price5 Amount5	
80 Country Country		Qty6ltem6	Price6 Amount6	
Phone Phone		Qty7 Item7	Price7 Amount7	
		Qty8ltem8	Price8 Amount8	
20 Memo		Qty9ltem9	Price9 Amount9	
		Qty1 Item10	Price10 Amount10	
		Qty1 Item11	Price11 Amount11	
TILE 60		Qty1 Item12	Price12 Amount12	
6 80			Amount9	
			Amount10	
<u>111</u> 00			Amount12	
20			Amount 12	
4 %				
<u>40</u>				-
N 🗌 🔪 Geneva	9pt	×Opt yOpt ∆×Opt ∆yOpt		1/7

Move the mouse over the new Amount9 data cell you have created. The mouse arrow will turn into a tiny menu icon (see "<u>Working with Data Cell Objects</u>" on page 613).

	Qty1  tem11	Price11 Am	ount11
<b>EXECUTE</b> 60	Qty1 Item12	Price12 Am	ount12
		Ar	mo <u>unt</u> 9
80		Am	
		Am	ount11
	-	Am	ount12
20			

Press the mouse and select **SubTotal** from the pop-up menu.

-						Num	ltem6 Bring 6	
			s:Order Entry (100%)	Date	Price6	日日		
PIX	20  40  60  80  10	0120140160	180 200	022012	240 260 280 300 320 340 360 380	Name	Amount6	560 🔺
	Invoice # Num [	Date Date			Qtyltem	Company	Qty7	
	Name Name				Qty1 Item1	Address	ltem7	
20	Company Company				Qty2 tem2	City	Price7	
40	Address Address				Qty3 Item3	State	Amount7	
CELL 60					Qty4 Item4	Zip	Qty8	
	City		Sta	Zip	Qty5ltem5	Country	ltem8	
<b>1</b> 80	Country Country				Qty6 Item6	Phone	Price8	
	Phone Phone Memo				Qty7 Item7 Qty8 Item8			
	Memo				Qty9Item9	Memo	Amount8	
20					Qty1 Item10	Qty1	Qty9	
40					Qty1 Item11	ltem 1	ltem9	
					Qty1 Item12	Price1	Price9	
						Amount1	Amount9	
80						Qty2	Qty10	
414 00						ltem2	ltem10	
20						Price2	Price10	
40						Amount2	Amount10	•
N	Gene	eva	9pt		×Opt yOpt ∆×Opt ∆yOpt	Qty3	Qty11	► 11/2
						ltem3	ltem11	
						Price3	Price11	
						Amount3	Amount11	
						Qty4	Qty12	
						ltem4	ltem12	
						Price4	Price12	
						Amount4	Amount12	
						Qty5	SubTotal N	
						ltem5	TaxRate `	
						Price5	Tax	
						Amount5	Shipping	
						Qty6	Total	

When you release the mouse the data cell will be assigned to the SubTotal field.

	Qty1 Item11	Price11 Amount11
	Qty1 Item12	Price12 Amount12
		SubTotal
80		Amount10
00		Amount11
20		Amount12

Repeat this for each of the other three data cells.

	Qty1 Item11	Price11 Amount11
<b>TILE</b> 60	Qty1  tem12	Price12 Amount12 SubTotal
80		Tax
		Shipping Total
<b>2</b> 0		

Since you're pretty much a professional by now you should have no problem finishing up this form so that it looks like this.

				My I	nvoid	ces:0	rder	Entry (	100%) 📃				E	
	20 40	60 80 1	00 120	140 160 1	80 20	0 220 2	240 26	0 280 300	320 340 360	380 400	420 440 4	60 480 500		
	Invoice #	Num	Date	Date			Qty	Item			Phice	Amount	E	
20	Name	Name					Qty1	ltem1			Price1	Amount1	- E	٦
	Company	Company					Qty2	ltem2			Price2	Amount2		
40	Address	Address					Qty3	ltem3			Price3	Amount3		
CELL 60							Qty4	ltem4			Price4	Amount4		
<b>60</b>		City			Sta	Zip	Qty5	ltem5			Price5	Amount5		
80	Country	Country					Qty6	ltem6			Price6	Amount6		
	Phone	Phone					Qty7	ltem7			Price7	Amount7		
	Memo						Qty8	ltem8			Price8	Amount8		
	Memo						Qty9	ltem9			Price9	Amount9		
							Qty1	ltem10			Price10	Amount10		
O 40							Qty1	ltem11			Price11	Amount11		
<b>FIE</b> 60							Qty1	ltem12			Price12	Amount12		
											Subtotal	SubTotal		
80									Tax Rate	TaxRate	Tax	Tax		
11.00											Shipping	Shipping		
											Total	Total		
20														•
		Gen	ieva		9pt		×Opt	yOpt ∆×0	pt ∆yOpt	• • •				11

Be sure to Save this masterpiece before you go any further.

# **Entering Data into the Invoice**

Before you can enter data into the invoice you must switch to Data Access Mode. You may also want to adjust the size of the window to match the size of your form.

			My I	Invoice	s:0r	ler Entr	у				JE
	Invoice #	1 Date 1	0/28/00		Qty	Item			Phice	Amoun	t 🔺
29	Name										
	Company										
	Address										
	Country										-
<b>I</b>	Phone										
l l → l <sup>L</sup>	Memo										-
<b>~</b> €											
<u></u>											
									Outstand		-
							Tax Data	7 75	Subtotal		-
					_		Tax Rate	7.75			-
									Shipping Total		Ţ
-			4						TUTAL		-Ľ
	1 visib	ole/1 total	◀ 🛄								1/1/

As you start typing data you'll quickly discover a problem. Pressing the **Tab** key after you enter the name causes Panorama to tab into the first Qty line item instead of the Company field. Oops!

	My In	voices:Order Entry		
Invoice #	1 Date 10/28/00	Qtyltem	Price	Amount 📥
	Linda Bischoff			
Company				
Address				

To fix this problem switch back into Graphic Design Mode. While holding down the **Shift** key click on the Name, Company, Address, City, State, Zip, Country, Phone and Memo data cells

My In	voices:	Order Entry (100%)	E E
PIX 20 40 60 80 10012014016	180 200	220 240 260 280 300 320 340 360 380 400	120 440 460 480 5
📐 Invoice 🗶 Num Date Date		Qtyltem	Price Amo 🗏
Name Name		Qty1 Item1	Price1 Amou
Company Company		Qty2 tem2	Price2 Amou
40 Address Address		Qty3 Item3	Price3 Amou
		. Qty4 Item4	Price4 Amou
Lity	[Sta]	Zip _ Qty5 tem5	Price5 Amou
Country Country		Qty6 Item6	Price6 Amou
Phone Phone		Qty7 tem7	Price7 Amou
CO Memo		Qty8 tem8	Price8 Amou
20 Memo		Qty9 tem9	Price9 Amou
		Qty1 Item10	Price10 Amount
	6	Qty1 Item11	Price11 Amount
		Qty1 Item12	Price12 Amount
			Subtotal SubTo
80		Tax Rate TaxRate	Tax
			Shipping Shipp 🍸
Geneva Geneva	9pt	х2pt y117pt Δx245pt Δy105pt 🛛 🔻 🖣	■ ▶ //

Now select the Group command from the Arrange menu.

Arrange	
Bring to Front	<b>#=</b>
Send to Back	ж-
Group 📐	≋G
Ungroup ^	

This command combines the nine objects into one combined object (see "<u>Grouping Objects Together</u>" on page 514). Instead of having handles around each individual object (see illustration above) there are now only four handles around the four corners of the combined object.

My Inv	voices:Orde	er Entry (100%)		
20 40 60 80 100120140160	180 200 220 2	40 260 280 300 320 340 360	380 400 420 440 4	60 480 5 🔺
🔉 🗼 Invoice 🖊 Num 🛛 Date 🛛 Date		Qtyltem	Price	Amo 🗏
20 Name Name		Qty1 Item1	Price1	Amou
Company Company		Qty2 tem2	Price2	Amoui
40 Address Address		Qty3 Item3	Price3	Amoui
<b>CELL</b> 60		Qty4 Item4	Price4	Amoui
City	Sta Zip	Qty5 Item5	Price5	Amoui
80 Country Country		Qty6 Item6	Price6	Amoui
Phone Phone	/	Qty7Item7	Price7	Amoui
Piemo		Qty8 Item8	Price8	Amoui
20 Memo		Qty9Item9	Price9	Amoui
		Qty1 Item10	Price10	Amount
handles for group object	t	Qty1 Item11		Amount
<b>THE</b> 60		Qty1 Item12	Price12	Amount
			Subtotal	SubTc
80		Tax Rate	TaxRate Tax	
			Shipping	Shipp 🎽
Geneva Geneva	9pt 🛼	pt y1pt &×8191pt &y8191pt		- • 41

Now each time you press the **Tab** key Panorama will advance to the next cell within the group (see "<u>Tab</u> <u>Order in Forms</u>" on page 648).

My Invoice	s:0r	der Entry		
	Qty	/Item	Phice	Amount 📥
Name Linda Bischoff Company Mark Energy Co	-			0.00
Address 955 N. Harbor Cir.				
Fresno CA 33747				
Country Country	⊢			
Phone (209) 452-1355				
Memo				
	≣			
	-			
			Subtotal	0.00
	-	Tax Rate 7.75		0.00
	•		Shipping Total	0.00 🔻
1 visible/1 total				•

The next tab will bring you to the first line item field. Enter the quantity, item and price.

My Invoices:Order Entry		
Invoice # 1 Date 10/28/00 Qtyltem	Price	Amount 📥
Name Linda Bischoff 12 Pencils	0.59	0.00 📃
Company Mark Energy Co		
Address 955 N. Harbor Cir.		
Fresno CA 93747		

When you press the Enter key Panorama will calculate the line item total, subtotal, tax and grand total.

	My	Invoice	s:0r	der Entr	у				Ð	E
	Invoice # 1 Date 10/28/00			Item			Price	Amo	unt	•
29.	Name Linda Bischoff		12	Pencils			0.59	7	.08	) 美
~	Company Mark Energy Co								-1	
	Address 955 N. Harbor Cir.									
	Fresno C	A 93747								
	Country									
Ŧ	Phone (209) 452-1355									
	Memo									
≁										
								$\frown$	$\geq$	
							Subtotal		.08	$\Lambda$
					Tax Rate	7.75		0	.55	
							Shipping			
							Total	7	.63	/-
	1 visible/1 total 🛛 🖣 🎹								1	11/

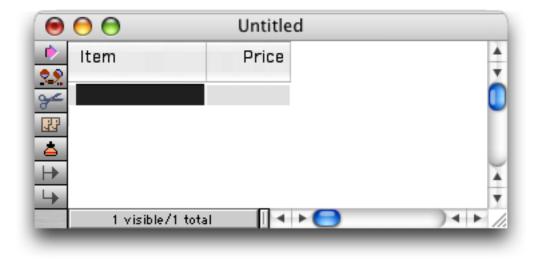
These calculations were set up for you by the **New Database Wizard**. To learn how to set up or modify these calculations yourself see "<u>Automatic Calculations</u>" on page 306.

# Lesson 4: Building a Price List

Now that the invoice is complete you will build a price list database and link the price list to the invoice. Start by launching Panorama and the **New Database Wizard**. The price list database will have two fields — Item and Price. (See "<u>Fields</u>" on page 213 for a complete explanation of fields.) Type in the name of each field into the wizard, with each name on a separate line. The Price field will contain money values so it should have a suffix of **\$**.

00	🖯 🔿 New Database Wizard											
<b>S</b> TEMPLATES		IMPORT TEXT FILE				OPEN	OPEN FAVORITE	A OPEN WIZARD	AGBE EFG OPEN EXAMPLE			B
Fields (Invoice	e)				Quick	Reference						
ltem Price\$				*	Num	eric fields m	name on a se nust end with floating point)	/ // (integer)				)
				-	Date	fields must	have date in	the name	(Date, Ch	eckDate, In	voiceDate,	etc.)

When you press the Make New Database button the wizard will create a new database for you. The database is displayed using a row and column format called the **data sheet**. The new database contains one blank record (line) and two fields (columns).



#### Loading the Data

To use the price list you'll need to type in a bunch of data. That still doesn't sound like much fun, so we've created a database that is programmed to automatically fill your new price list database with sample data. Start by choosing **Favorite Databases** from the Wizard menu (see "<u>The Favorite Databases Wizard</u>" on page 60). The database you need is called <u>Sample Price List</u>. To locate it, type <u>sample</u> into the search area at the top. The wizard will show you a short list of files including the one we want.

\varTheta 🔿 🔿 🛛 Fa	avorite Databases
🧟 sample	🛞 🗹 Name 📃 Folder 📃 Info
Favorites (7 visible/72 total)	Info Location Fields Forms Procedures
췙 Music Video Samples 췙 My Sample Invoices 췙 Sample Alerts 췙 Sample Checkbook 췕 Sample Dialogs	Folder : Sample Data Created : Mon, Oct 30, 2000 @ 5:32 AM Modified : Thu, Jan 25, 2001 @ 5:09 AM Size : 7,940 bytes (65 records)
Sample Price List	Description
D Trigger Samples	This database is part of the Panorama Step-by- Step tutorial. After you have created your tutorial price list database you can open this database to automatically fill your price list

Double click on the <u>Sample Price List</u> file to open it. A small window will appear briefly. The database has been pre-programmed to automatically transfer the price list data into the new database you have created.

۲	0	Untitle	d	
<u>له</u>	Item	Price		A V
¥	Soft Lead Wood	1.99		
8	Medium Lead W	1.99		
	Hard Lead Woo	1.99		
<b>a</b>	Pencil Cap Eras	0.89		
<b>H</b>	Pink Eraser	0.49		<b>A</b>
4	Pink Eraser (La	0.79		Ψ.
	65 visible/65 tot	al 📗 🖣	+ 😑	) ◀ ► //.

You may want to adjust the font size and the widths of some of the columns (see "<u>Adjusting Column Widths</u>, <u>Font and Size</u>" on page 16).

•	Item	Price	4
2	Soft Lead Wood Pencils	1.99	2
ħ	Medium Lead Wood Pencils	1.99	
, 	Hard Lead Wood Pencils	1.99	
33	Pencil Cap Erasers	0.89	
≛	Pink Eraser	0.49	
<b>≛</b>	Pink Eraser (Large)	0.79	
	Pencil Sharpener	3.79	
-	Drafting Pencil 0.5mm	8.69	
	Lead Refills 0.5mm	1.09	
-	Drafting Pencil 0.7mm	8.69	1
	Lead Refills 0.7mm	1.09	4
-	Drafting Pencil Eraser	2.79	

Before continuing you should use the **Save** command in the File menu to save your new creation. The first time you save any file Panorama will ask you to give it a name. You'll also want to check the **Save Window Positions** option (see "<u>Saving Window Positions</u>" on page 86). When everything is set up press the **Save** button. (To see what this dialog looks like on the PC see "<u>Saving Your Work</u>" on page 11.)

Save A											
Save As My Price List											
	📁 Tutorial	•									
<ul> <li>Network</li> <li>Jaguar</li> <li>Classic</li> <li>Panther</li> <li>Alaska</li> <li>iSightWeb ▲</li> <li>CocoaGest ▲</li> <li>Desktop</li> <li>Operations</li> <li>Applications</li> <li>jimrea</li> <li>Documents</li> <li>Movies</li> <li>Music</li> </ul>	Name My Checkbook My Invoices My Mailing List	Date Modified Today 7oday 9/25/04									
		Cancel									

You may also want to add your new file to the **Favorite Database** wizard. See "<u>Adding A Database To Your</u> <u>List Of Favorites</u>" on page 36 for a refresher on how to do this.

# Linking the Price List to the Invoice

The price list is now ready to link to the invoice. The link will be designed to look up a price automatically when an item is entered into the invoice. Start arranging the invoice and price list windows so that both are visible, with the invoice window on top (something like the illustration shown below).

					My Invoice	s:Orde	r Entry				Ħ
		Invoice #	1 Date	10/28/00		Qty Iter	m		Price	Amount	
			nda Bischoff			12Per			0.59	7.08	=
		Company Ma	ark Energy Co								
		Address 95	55 N. Harbor Cir								
			esno		CA 93747						
		Country									
	¥		09) 452-1355								
	<b>□ ↓</b>	Memo									
	<b>~</b> €	1									
		1									
									Subtotal	7.08	
							Tax Rate	7.75		0.55	
								1.10	Shipping	0.00	
									Total	7.63	ΞI
	Item	1 visible	e/1 total	◀ Ⅲ							10
										,	14
	Soft Lead Wood Pe		1.99								
	Medium Lead Wood		1.99								
	Hard Lead Wood Pe Pencil Cap Erasers		1.99 0.89								
	Pink Eraser	•	0.89								
	Pink Eraser (Large	•)	0.79								
	Pencil Sharpener		3.79								
	Drafting Pencil 0.5		8.69								
	Lead Refills 0.5mn		1.09								
	Drafting Pencil 0.7		8.69								
	Lead Refills 0.7mn Drafting Pencil Era		1.09 2.79 🔻								
-	-										
	65 visible/65	i total									

Using the **View** menu, switch from the invoice form to the invoice design sheet (see "<u>The Design Sheet</u>" on page 218).

0	0						Му	Invoices:DESIGN					
	Field Name	Туре	Digits	Align	Output	Du	p Defau	Equation	Read	Write	Width	Notes	
•	Num	Numeric	0	Right	*.	Ye	s +1		0	0	- 3		
¥	Date	Date	0	Left	ŕ	Ye	s today	,	0	0	6		
<b>≁</b>	Name	Text	0	Left		Ye	s		0	0	15		
<u> </u>	Company	Text	0	Left		Ye	s		0	0	15		
۵.	Address	Text	0	Left		Ye	s		0	0	15		
	City	Text	0	Left		Ye	5		0	0	12		

Double click on the Equation cell in the Price1 row.

Field Name	Туре	Digits	Align	Output	Dup	Defau	Equation	Read	Write	Width	Notes	
Num	Numeric	0	Right	*,	Yes	+1		0	0	- 3		
Date	Date	0	Left		Yes	today		0	0	6		
Name	Text	0	Left		Yes			0	0	15		
Company	Text	0	Left		Yes			0	0	15		
Address	Text	0	Left		Yes			0	0	15		
City	Text	0	Left		Yes			0	0	12		
State	Text	0	Left		Yes			0	0	4		
Zip	Text	0	Left		Yes			0	0	5		
Country	Text	0	Left		Yes			0	0	10		
Phone	Text	0	Left		Yes			0	0	12		
Memo	Text	0	Left		Yes			0	0	20		
Qty1	Numeric	0	Right	*,	Yes			0	0			
Item1	Text	0	Left		Yes			0	0	10		
Price1 —	Numeric	Float	Right	*,**	Yes		•					
Amount1	Numeric	Float	Right	*,.**	Yes							
Qty2	Numeric		Right	*,	Yes							
Item2	Text	0	Left		Yes					10		
Price2	Numeric	Float	Right	*,.**	Yes			0	0	6		
Amount2	Numeric	Float	Right	*,.**	Yes		QtyΩ*PriceΩ	0	0	6		
Qty3	Numeric	0	Right	<b>*</b> ,	Yes			0	0			
ltem3	Text	0	Left		Yes			0	0	10		
Price3	Numeric	Float	Right	*,.**	Yes			0	0	6		
Amount3	Numeric	Float		*,.**	Yes		QtyΩ*PriceΩ	0	0	6		
Qty4	Numeric		Right	<b>*</b> ,	Yes			0	0	- 3		

Now choose **lookup(...)** from the Functions menu (see "<u>Functions Menu</u>" on page 1181).

Functions		
Operators	►	lower(text)
Advanced	►	max(number,number)
Arrays	►	min(number,number)
?(cond,trueFormula,falseFormula)		Misc 🕨
abs(number)		pattern(number,pattern)
asc(text)		rep(text,number)
chr(number)		replace(text,oldtext,newtext)
city(zip)		replacemultiple(text,oldtext,newtext,sep)
clipboard()		rnd()
county(zip)		round(number,step)
Date & Time	►	sandwich(pretext,text,suftext)
divzero(numerator,denominator)		search(text,phrasetext)
exportcell(field)		seq()
extract(text,separator,itemnum)		sizeof(text)
fieldstyle(fieldname)		state(zip)
fix(number)		str(number)
fixed(number)		strip(text)
float(number)		stripchar(text,range)
grabdata(file,field)		striptonum(text)
Graphics		striptoalpha(text)
import()		sum(lineΩ)
Info		uniqueid(field,root)
int(number)		upper(text)
length(text)		upperword(text)
listchoices(field,separator)		val(text)
lookup()		zeroblank(number)

Choosing this menu item opens a dialog for setting up the lookup( function (see "<u>Linking With Another</u> <u>Database</u>" on page 1267).

Lookup Function Wizard
I want to retrieve information from the 🔹
database using the lookup 🗘 function.
The information I want to retrieve is in the 🚺 🚺 field of this database.
The information I want to retrieve is in the record where the
field 🔹 🔹 in the database Untitled
matches the field 🔹 🔹 in the database My Invoices.
Cancel OK

Start by selecting the database you want to look up data from, in this case the My Price List database.

Looku	p Function Wizard	
I want to retrieve information from the database using the lookup	ZipInfo_ZipInfo.com New Database Wizard My Checkbook My Invoices	•
The information I want to retrieve is in th	My Price List Favorite Databases	field of this database.
The information I want to retrieve is in the	record where the	

Now tell Panorama what you want to look up, in this case the Price.

Lookup I	Function Wizard
I want to retrieve information from the My	/ Price List
database using the lookup	function.
The information I want to retrieve is in the	Item 🗧 field of this database.
The information I want to retrieve is in the re	cord where the

We want to look up the price where the Item in the price list matches the Item value in the invoice. So select Item from My Price List.

The information I want to r	etrieve is in the record where the
field Item Price	in the database My Price List
matches une neur	🗧 in the database My Invoices.
	Cancel OK

Select Item1 for the last pop-up.

		company	
I	The information I want t	Address	record where the
I	a LL Itam	City	tahasa Mu Driss List
I	field Item	State	tabase My Price List
l	matches the field	Zip	in the database My Invoices.
I	indenes the neid	Country	in the database my involces.
I		,	
I		Phone	
1		Memo	Cancel OK
ş		Qty1	
		ltem1 📡	
		Price1	
		Amount1	
		Qty2	
		12	
		•	

Here's the finished dialog with everything filled in.

Lookup Function Wizard
I want to retrieve information from the My Price List
database using the lookup 🗘 function.
The information I want to retrieve is in the <b>Price field of this database</b> .
The information I want to retrieve is in the record where the
field 🛛 Item 🔹 in the database My Price List
matches the field Item1 🔹 in the database My Invoices.
Cancel OK
matches the field Item1 in the database My Invoices.

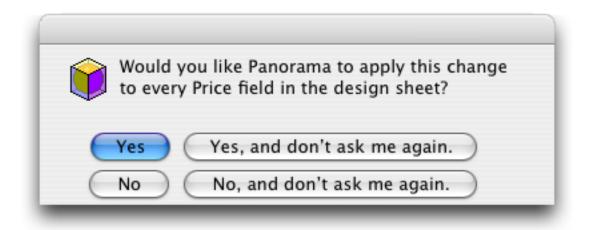
Press the **OK** button to build the formula for looking up the price.

00						My	Invoices:DESIGN					
Field Name	Туре	Digits	Align	Output	Dup	Defau	Equation	Read	Write	Width	Notes	4
Num	Numeric	0	Right	*,	Yes	+1		0	0	3		-
Date	Date	0	Left		Yes	today		0	0	6		
Name	Text	0	Left		Yes			0	0	15		
Company	Text	0	Left		Yes			0	0	15		
Address	Text	0	Left		Yes			0	0	15		
City	Text	0	Left		Yes			0	0	12		
State	Text	0	Left		Yes			0	0	4		
Zip	Text	0	Left		Yes			0	0	5		
Country	Text	0	Left		Yes			0	0	10		
Phone	Text	0	Left		Yes			0	0	12		
Memo	Text	0	Left		Yes			0	0	20		
Qty1	Numenic	0	Right	*,	Yes			0	0	- 3		
ltem1	Text	0	Left		Yes			0	0	10	_	
Price1	Numeric	Float	Right	*,.**	Yes		lookup("My Price List","Iter	m",«Item1>	»,"Price	(0,0,")		
Amount1	Numeric	Float	Right	*,.**	Yes							
Qty2	Numeric	0	Right	*,	Yes							
ltem2	Text	0	Left		Yes					10		
Price2	Numeric	Float	Right	*,.**	Yes			0	0	6		
Amount2	Numeric	Float	Right	*,.**	Yes		QtyΩ*PriceΩ	0	0	6		

To learn more about how this formula works see "Linking With Another Database" on page 1267. The formula generated by the dialog needs one slight adjustment — Item1 must be replaced by Item $\Omega$ . To type the  $\Omega$  character use **Option-Z** on the Macintosh and **Alt-0166** on the PC (see "Special Characters" on page 1193 and "Line Item Fields" on page 1188).

1.0010	1.575	•	EVI V		1.00			U .	10	
Qty1	Numenic	0	Right	*,	Yes		0	0	- 3	
Item1	Text	0	Left		Yes		0	0	10	_
Price1	Numenic	Float	Right	*,.**	Yes	lookup("My Price List","H	tem",«ItemΩ»,	"Price"	",0,0)	
Amount1	Numenic	Float	Right	*,**	Yes					
Qty2	Numenic	0	Right	*,	Yes					
Item2	Text	0	Left		Yes		0	0	10	
Price2	Numenic	Float	Right	*,.**	Yes		0	0	6	
Amount2	Numeric	Float	Right	*,.**	Yes	QtyΩ*PriceΩ	0	0	6	
Qty3	Numeric	0	Right	<b>#</b> ,	Yes		0	0	3	

Once this adjustment has been made press the **Enter** key. Panorama will respond with this dialog (see "<u>Mod-ifying Line Item Fields</u>" on page 231).



Press the Yes, and don't ask me again button. Panorama will update not only the Price1 field definition, but also Price2, Price3, Price4 etc. You can see this by scrolling down the design sheet. (We've split the window into two panes (see "Splitting a Window" on page 165) and expanded the width of the Equation column to make this easier to see.)

Field Name	Туре	Digits	Align	Output	Dup	Defau	Equation	Read	Write	ł
Qty1	Numenic	0	Right	*,	Yes			0	0	Î
Item1	Text	0	Left		Yes			0	0	
Price1	Numeric	Float	Right	*,.**	Yes		lookup("My Price List","Item",«ItemΩ»,"Price",0,0)	0	0	
Amount1	Numeric	Float	Right	*,**	Yes		QtyΩ*PriceΩ	0	0	
Qty2	Numeric	0	Right	*,	Yes			0	0	
Item2	Text	0	Left		Yes			0	0	
Price2	Numeric	Float	Right	*,.**	Yes	(	lookup("My Price List","Item",«ItemΩ»,"Price",0,0)	) 0	0	
Amount2	Numeric	Float	Right	*,.**	Yes		QtyΩ*PriceΩ	0	0	
Qty3	Numeric	0	Right	*,	Yes			0	0	
ltem3	Text	0	Left		Yes			0	0	
Price3	Numenic	Float	Right	*,.**	Yes	(	lookup("My Price List","Item",«ItemΩ»,"Price",0,0)	) 0	0	
Amount3	Numenio	Float	Right	*,.**	Yes	_	QtyΩ*PriceΩ	0	0	
Qty4	Numenio	0	Right	<b>*</b> ,	Yes			0	0	
ltem4	Text	0	Left		Yes			0	0	
Price4	Numenio		Right	*,.**	Yes	(	lookup("My Price List","Item",«ItemΩ»,"Price",0,0)	) 0	0	
Amount4	Numenio		Right	*,.**	Yes	_	QtyΩ*PriceΩ	0	0	
Qty5	Numenic		Right	*,	Yes			0	0	
ltem5	Text	0	Left		Yes			0	0	
Price5	Numenio		Right	*,.**	Yes		lookup("My Price List","Item",«ItemΩ»,"Price",0,0)	) 0	0	
Amount5	Numenio		Right	*,.**	Yes		QtyΩ*PriceΩ	0	0	
Qty6	Numeric		Right	<b>#</b> ,	Yes			0	0	
ltem6	Text	0	Left		Yes			0	0	
Price6	Numeric			*,**	Yes		lookup("My Price List","Item",«ItemΩ»,"Price",0,0)	) 0	0	
Amount6	Numenio	Float	Right	*,.**	Yes		QtyΩ*PriceΩ	0	0	

Now click on the Item1 field name (we've also unsplit the window and reduced the width of the Equation column).

•	00						My I	nvoice	:DESIGN					
•	Field Name	Туре	Digits	Align	Output F	Input	Range	Choices	Link	Clai	Dup	Defau	Equation	ł
	Qty1	Numeric	0	Right	*,		Any			Off	Yes			1
¥	Item1	Text	0	Left	·		Any			Off	Yes			E
	Price1	Numeric	Float	Right	*,.**		Any			Off	Yes		lookup("My Price List","#	
₽	Amount1	Numeric	Float	Right	*,.**		Any			Off	Yes		QtyΩ*PriceΩ	
\$	Qty2	Numeric	0	Right	<b>#</b> ,		Any			Off	Yes			
-	Item2	Text	0	Left	·		Any			Off	Yes			
•	Price2	Numeric	Float	Right	*,.**		Any			Off	Yes		lookup("My Price List","H	

Choose the Set Up Link command from the Special menu (see "<u>Clairvoyance® Across Multiple Files</u>" on page 289).

Set Up Clairvoyar	nce Link to Separate Field
Choose Database _ChannelLib	Choose Field
_DatabaseLib _DialogAlertLib _DiskLib _FormLib _ImportExportLib _InternetLib _MenuLib _SpeechLib _TextLib _UtilityLib _WebContentLib ZipInfo_ZipInfo.com New Database Wizard My Checkbook My Invoices My Price List Favorite Databases	Price
	Cancel OK

On the left hand side select My Price List. Then select Item on the right hand side (as shown above). Press OK to set up the link.

۲	0						My I	nvoice	s:DESIGN				
3	Field Name	Туре	Digits	Align	Output F	Input	Range	Choices	Link	CI	Dup	Defau	Equation
$\diamond$	Qty1	Numeric	0	Right	*,		Any			Of	Yes		
4	Item1	Text	0	Left	·		Any	(	My Price List : Item	Or	Yes		
	Price1	Numenic	Float	Right	*,.**		Any		-	Of	Yes		lookup("My Price List","H
33	Amount1	Numenic	Float	Right	#,##		Any			Of	Yes		QtyΩ*PriceΩ
۵	Qty2	Numeric	0	Right	*,		Any			Of	Yes		
	Item2	Text	0	Left			Any			Of	Yes		
$\rightarrow$	Price2	Numeric	Float	Right	*,.**		Any			Of	Yes		lookup("My Price List","H
	Amount2	Numeric	Float	Right	*,.**		Any			Of	Yes		QtyΩ*PriceΩ
-	Qty3	Numeric	0	Right	<b>*</b> ,		Any			Of	Yes		-
-	ltem3	Text	0	Left			Any			Of	Yes		

The link must be copied to all of the other item fields (Item2, Item3, Item4, etc.) To do this, double click on the link.

0	00						My I	nvoices	s:DESIGN					
	Field Name	Туре	Digits	Align	Output F	Input	Range	Choices	Link	CI	Dup	Defau	Equation	4
•	Qty1	Numeric	0	Right	*,		Any			Of	Yes			M
4	Item1	Text	0	Left	·		Any		My Price List : Item					
<b>≁</b>	Price1	Numeric	Float	Right	*,.**		Any			Of	Yes		lookup("My Price List","H	
33	Amount1	Numeric	Float	Right	*,**		Any			Of	Yes		QtyΩ*PriceΩ	
4	Qty2	Numeric	0	Right	<b>#</b> ,		Any			Of	Yes			
	ltem2	Tevt	0	Left			Any			Of	Yes			

Field Name	Туре	Digits	Align	Output F	Input	Range	Choices	Link	CI	Dup	Defau	Equation
Qty1	Numeric	0	Right	*,		Any			Of	Yes		
Item1	Text	0	Left	ŕ		Any		My Price List:Item	Or	Yes		
Price1	Numeric	Float	Right	*,.**		Any			Of	Yes		lookup("My Price List","
Amount1	Numeric	Float	Right	*,**		Any			Of	Yes		QtyΩ*PriceΩ
Qty2	Numeric	0	Right	<b>*</b> ,		Any			Of	Yes		
Item2	Text	0	Left	ŕ		Any	(	My Price List : Item	Of	Yes		
Price2	Numeric	Float	Right	*,.**		Any			Of	Yes		lookup("My Price List","
Amount2	Numeric	Float	Right	*,**		Any			Of	Yes		QtyΩ*PriceΩ
Qty3	Numeric	0	Right	<b>*</b> ,		Any			Of	Yes		
Item3	Text	0	Left			Any	(	My Price List : Item	Of	Yes		
Price3	Numeric	Float	Right	<b>*</b> ,. <b>*</b> *		Any			Of	Yes		lookup("My Price List","
Amount3	Numeric	Float	Right	*,.##		Any			Of	Yes		QtyΩ*PriceΩ
Qty4	Numeric	0	Right	<b>*</b> ,		Any			Of	Yes		
Item4	Text	0	Left			Any	(	My Price List : Item	Of	Yes		
Price4	Numeric	Float	Right	*,.**		Any			Of	Yes		lookup("My Price List","
Amount4	Numeric	Float	Right	*,.**		Any			Of	Yes		QtyΩ*PriceΩ
Qty5	Numeric	0	Right	<b>*</b> ,		Any			Of	Yes		
Item5	Text	0	Left			Any	(	My Price List :Item	Of	Yes		
Price5	Numeric	Float	Right	*,.**		Any			0f	Yes		lookup("My Price List","
Amount5	Numeric	Float	Right	*,.**		Any			Of	Yes		QtyΩ*PriceΩ
Qty6	Numeric	0	Right	*,		Any			Of	Yes		
ltem6	Text	0	Left			Any	(	My Price List :Item	Of	Yes		
Price6	Numeric	Float	Right	*,.**		Any			Of	Yes		lookup("My Price List","
Amount6	Numeric	Float	Right	#,.##		Any			01	Yes		QtyΩ*PriceΩ

When you press the **Enter** key the link specification will be copied to all of the other Item fields.

Use the **View** menu to switch back to the Order Entry form. When Panorama asks you if you want to create a new generation, press the **Yes** button (see "<u>Database "Generations"</u>" on page 218). Then **Save** the database before continuing.

# Using the Linked Invoice & Price List

Since you've set up a Clairvoyant link between the invoice and the price list you'll only need to enter the first few letters of a description.

				N	/ty Ir	nvoice	s:0r	der Entry			
	Invoice #	1	Date	10/28/00			Qty	Item	Phice	Amount	
0	Name	Linda Bi	schoff				12	Blue Medium Ball Point Pen			
	Company	Mark En	ergy Co								
	Address	955 N. H	larbor Ci	r.							
		Fresno			CA	93747					

When you press the **Enter** key Panorama will look up the price from the **Price List** database. Once the price is looked up Panorama will then automatically calculate the subtotal, tax and grand total.

My Invoice	s:Order Entry	
Invoice # 1 Date 10/28/00 Name Linda Bischoff	Qtylitem 12Blue Medium Ball Point Pen	Price Amount  0.69 8.28
Company Mark Energy Co Address 955 N. Harbor Cir.		
Fresno CA 93747		
Country Phone (209) 452-1355 Memo		
	Tax Rate 7.75	Subtotal 8.28 Tax 0.64
		Shipping Total 8.92 🔻
1 visible/1 total 🛛 🚺		▶ <i>1</i> //

You can enter up to 12 items in each invoice.

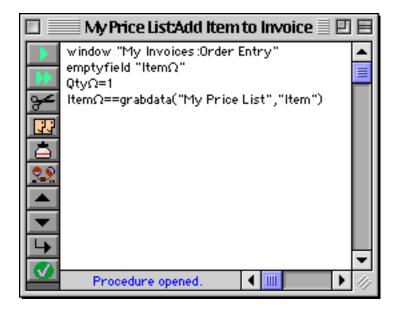
□ M	ty Invoice	s:Order Entry		E
Invoice # 1 Date 10/28/00		Qty Item	Phice	Amount 📥
Name Linda Bischoff		12Blue Medium Ball Point Pen	0.69	8.28 🔳
Lombany Mark Energy Lo		3Pink Highlighter	1.19	3.57
Address 955 N. Harbor Cir.		5 Memo Pad	3.39	16.95
		12Paper Clips	1.59	19.08
Fresno	CA 93747	2 Rubber Band Ball	2.39	4.78
Country				
Phone (209) 452-1355				
Memo				
3-6				
			Subtotal	52.66
		Tax Rate 7.75		4.08
			Shipping	
			Total	56.74 🔻
1 visible/1 total 🛛 🖣 🎹				► 4/

#### Creating a Procedure to Add an Item

Now you'll write a very short procedure. Start by clicking on the Price List database.

	My Price List	P	Ξ
	ltem	Price	
▓▙▇ਯᆂᆂ	Laser Paper (8.5 × 11) Laser Paper (8.5 × 14) Envelopes (#10) Window Envelopes (#10) Double Window Envelopes Clipboard Memo Pad Plastic Paper Clips Paper Clips Rubber Band Ball Thumb Tacks Transparent Tape 65 visible/65 total	22.99 26.99 4.49 6.79 26.99 1.79 3.39 1.89 1.89 1.59 2.39 0.79 1.19	

Use the **View** menu to create a new procedure named Add Item to Invoice (see "Writing a Procedure from Scratch" on page 1350). Type in the four lines shown below, exactly as they are shown. (Remember, the  $\Omega$  character is typed in by pressing **Option-Z** on the Macintosh or **Alt-0166** on the PC. Depending on the fonts installed on your system the character may not look like  $\Omega$ , but it will work if you press the right keys.)



To check your typing use the **Check Procedure** tool. This tool can spot most typing mistakes (see "<u>Checking</u> <u>for Mistakes</u>" on page 1355).

	My Price ListAdd Item to Invoice 📃 🗉	Ξ
<ul> <li>▲</li> <li>▲</li> </ul>	window "My Invoices:Order Entry" emptyfield "ItemΩ" QtyΩ=1 ItemΩ==grabdata("My Price List","Item")	
	itenisz—–grabuatat ny Price List , iteni y	
29		
₹ I		_
-	Check Procedure	11/

Assuming there are no errors use the **View** menu to switch back to the data sheet. (If there are any errors - fix them!) Then pick the item you want to add to the invoice and choose **Add Item to Invoice** from the Action menu.

- <b>(</b>	File	Edit	View	Fields	Text	Search	Sort	Math	Setup	Action	Wizards	Help
										Add	Item to Inv	oice
							🗏 My P	rice Lis	t		<u>`</u>	
					•	Item				Price 🔺		
					22		•			1.89		
					אריי	Masking Ta				2.99		
					33	Drafting T Glue Stick				1.29		
						Glue Pen				2.39		
						Super Glue				1.79		
					↦	White Glue				1.39		
					<b>L</b>	Rubber Cer				3.69		
						Postal Sca				19.95		
						Heavy Dut	y Letter I	Folder	19	99.95		
						Yardstick				2.19		
						Steel Ruler	-			2.99 💌		
						65 vis	ible/65	total	•	► 4/		

The procedure will automatically add the selected item to the invoice.

		My Invoice	s:Order Entry			
	Invoice # 1 Date 10/28/0	D D	Qtyltem	Price	Amount	
29	Name Linda Bischoff		12Blue Medium Ball Point Pen	0.69	8.28	
<u> </u>	Company Mark Energy Co		3Pink Highlighter	1.19	3.57	
	Address 955 N. Harbor Cir.		5 Memo Pad	3.39	16.95	
			12Paper Clips	1.59		
	Fresno	CA 93747	2 Rubber Band Ball	2.39		
H÷-	Country		1 Postal Scale	19.95	19.95	
Ŧ	Phone (209) 452-1355					
	Memo					
÷						
				California	70.41	
				Subtotal		
			Tax Rate 7.75			
				Shipping		I.
				Total	78.24	Ľ
	1 visible/1 total 🛛 🖣 🎹					11

To learn more about how this procedure actually works see "<u>Assignment Statements</u>" on page 1366, "<u>Win-dows</u>" on page 1595 and "<u>Moving Left and Right</u>" on page 1663.

### **Creating a Price List Form with Buttons**

Now you'll create a price list form with buttons for adding items to the invoice. Start by using the **View** menu to create a new form named Add.

	My Price List:Add (100%) 🔤 🗉	
	Nauturlauturl <sup>1</sup>	•
N	-	
	-	

You're going to make a **View-As-List** form (see "<u>View-As-List Forms</u>" on page 877). To do this start by selecting the **Tile** tool. You may need to scroll the tool palette to access this tool (see "<u>Scrolling the Tool Palette</u>" on page 163).

	My Price List:Add (100%) 📃 🗉	
0	<sup>™</sup>	▲
CELL		=
Т	-	
H		
H		
O		
щ	Tile	
O		-
		11/

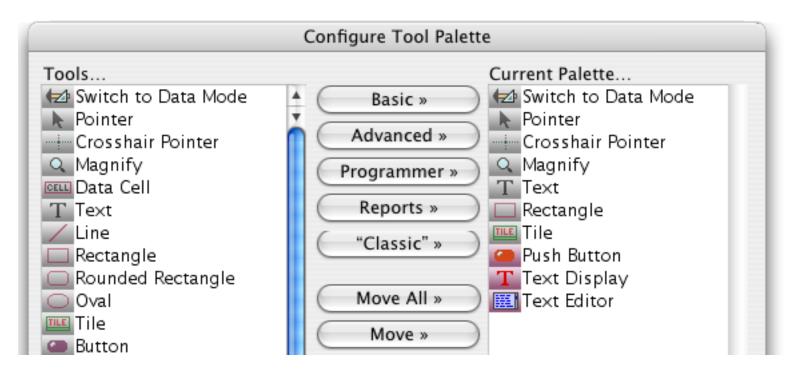
Expand the width of the window slightly, then drag the mouse across the form to create a tile (see "<u>Working</u> <u>with Tiles</u>" on page 886).

🗖 📃 My Price List:Add (100%) 📃 🖻 🖻

When you release the mouse a new **data tile** appears.

	My Price List:Add (100%) 📃 🗉	Ξ
CELL IN		•
T	aa	
	l I	
	Data	
01	-	

Before you continue with the next step you'll need to customize the tool palette. To do this choose **Tool Palette** from the Setup menu and then arrange the tools as shown below (see "<u>Customizing the Tool Palette</u>" on page 475).



Press the **OK** button, then select the **Push Button** tool (see "Push Buttons" on page 801).

	My Price List:Add (100%) 📃 🗉	
	IN	
<b>(</b>		
T	Data	
	1	
TILE		
0		
9	Push Button	÷
L,		- 11/

Now drag to create a button in the upper left hand corner of the data tile.

		My Price List:Add (100%) 📃 🗉	E
	IN		
	-		≣
	Ξ		
T	-	Data	
	13		

Now you'll need to select three options for the new push button. Using the pop-up menu select the procedure linked to this button, in this case Add Item to Invoice. (This means that when this button is pressed the Add Item to Invoice procedure will be triggered, just as if you had selected it from the Action menu.) Type in the title you want to appear in the button, in this case Add. Click on the button style you want to use, in this case 3D Rounded Rectangle.

Push Button S	SuperObject
Button Title Add Style Standard Push Button Transparent 3D Rectangle 3D Rounded Rectangle 3D Circle Beveled Rectangle Plain Rectangle Plain Circle	+/- 0 Color Title Fill Border Highlight Options Standard Font/Size Default Button 3D Title Hide Title Click/Release
Add Item To Invoice	Cancel OK

When you press the **OK** button the new push button will appear on your form.

My Price List:Add (100%)	DE
	L. L.
Add	
Data	

Select the **Pointer** tool and adjust the text size and overall dimensions of the button (see "<u>Text Size</u>" on page 509).

My Price List:Add (100%) 📃 🗉 🗉	E
	•
	≣
Add	

Now select the **Text Editor** tool (see "<u>Text Editor SuperObject</u>" on page 617).

	My Price List:Add (100%) 📃 🗉	E
	N	•
	Add	
<u> </u>		
	Data	
T		
	Text Editor	•
ШN		111

Drag the mouse to create a text editor object.

My Price List:Add (100%) 📃 🗉	E
	•
· · · · · · · · · · · · · · · · · · ·	
Add	

When you release the mouse the Text Editor SuperObject configuration dialog appears (see "<u>Text Editor</u> <u>Options</u>" on page 621). Set the options as shown in the illustration below.

	Text Editor SuperObject
Data	
💿 Field 🚼 🔘 Variable 🛛	Formula
Item	
Display Options	Editing Options
Padding	Insertion Pt.: at End
Wrap at end of line	Tab = 4 Spaces
Non-White Background	Update Variable Every Key
Borders	Terminate when: 🗹 Return 🗹 Tab
Top Shadow	Up/Down Arrows
☐ Left	Use Field Attr:
Right Focus Ring	Auto Caps: Off
_ Scroll Bars	Attach Procedure to Object
🗌 Vertical 📃 Horizontal	🗧 🗍Handler
Thin Scroll Bars	
Grow Box	📄 Every Key 📄 Most Keys 📄 Finished 📄 Focus

When you press the **OK** button the new Text Editor SuperObject will appear.

		My Price List:Add (100%) 📃 📃 🗉	Ξ
	IN		•
	Ξ		
<del>•</del>	-	Add Rubber Cement	
	3		
T	3	Data	
	13		

Select the **Pointer** tool and adjust the size and position of the new object (see "<u>Nudging the Size of an Object</u>" on page 491).

	My Price List:Add (100%) 📃 🗉 🗉	
	Add Rubber Cement	
T	Data	

Hold down the **Option** key (Mac) or the **Alt** key (PC) and drag the Text Editor object to the right (see "<u>Drag</u> <u>Duplicating</u>" on page 539).

🔲 📃 My Price List:Add (100%)		E
	3 111111	
	-	
Add Rubber Cement		
	-	
T - Data		
	_	

Adjust the size of the new object and select the **Right** command from the Text menu (see "<u>Text Alignment</u>" on page 572).

	My Price List:Add (100%) 📃 🛛 🖳	E
🔁 IN		•
	Add Rubber Cement Rubber	
<u> </u>		
T	Data	

Double click on the new text editor object (see "<u>The Object Properties Dialog</u>" on page 512) and change the field to Price.

	Text Editor SuperObject	
_ Data		
🖲 Field	Item Variable 🔘 Formula	
Item	Price	

Press **OK** to update the object.

My Price List:Add (100%) 📃 📃 🗉	Ξ
	•
 Add Rubber Cement 3.69	
Data	

Click in the tiles' drag bar to select it (see "<u>Working with Tiles</u>" on page 886).

	My Price List:Add (100%) 📃 🗉	
IN IN		
	· 1	
	Add Rubber Cement 3.69	
T	Data	

Use the color menu to change the tile to light gray.

	My Price List:Add (100%) 📃 🗉 🗉	Ξ	
🔁 IN anda	1.1.1.1.1.1.1.1.1.1.1.1.1.1 <sup>2</sup> .1.1.1.1.1.1.1.1 <sup>3</sup> .1.1.1		
	dd Rubber Cement 3.69		
	Data		
T			
		11/	

Drag the lower left hand handle of the tile up until there is an equal margin around the button and text editor objects.

🗖 👘 My Price List:Add (100%) 📰 🛛	E
	•
Add Rubber Cement 3.69	
🔳 🔤 Data	
	Ţ
	- 11

The finished form should look something like this.

My Price List:Add (100%) 📃 🗄 🗄	
·	
i	
 Add Rubber Cement 3.69	
Data	

Using the **Form Preferences** dialog in the Setup menu, change the viewing format for the form to View-As-List.

Form Preferences		
Viewing Format: O Individual Pages		
View-as-List		
Tab Order: 💽 Natural		
🔘 Data Sheet Order		
Back to Front		

Press the **OK** button, then switch back to **Data Access Mode**.

	My Price List:Add (100%) 📃 🗉	
<u>ta</u> t	Switch to Data Mode 2	•
	Add Rubber Cement 3.69	
<u> </u>	Data	
Т		
	1	
TILE	-	
	-	
T		₹
麗		11/

Here's what the form should now look like in Data Access Mode. The graphics on the tile are repeated over and over again for each record in the database.

	My Price List#	\dd 📃 🗉 🗄
	Add White Glue	1.39
	Add Rubber Cement	3.69
¥	Add Postal Scale	19.95
27	Add Heavy Duty Letter Folder	199.95
傦	Add Yardstick	2.19
<b>-</b>	Add Steel Ruler	2.99
	Add Plastic Ruler	0.79
	65 visible/65 total 🛛 🖣	

To add a particular item to the current invoice just click on the Add button for that item.

My Price Lista	Add 📃 🗉 🗄	
Add White Glue	1.39	
Add Rubber Cement	3.69	
Add Postal Scale	19.95	
Add Heavy Duty Letter Folder	199.95	

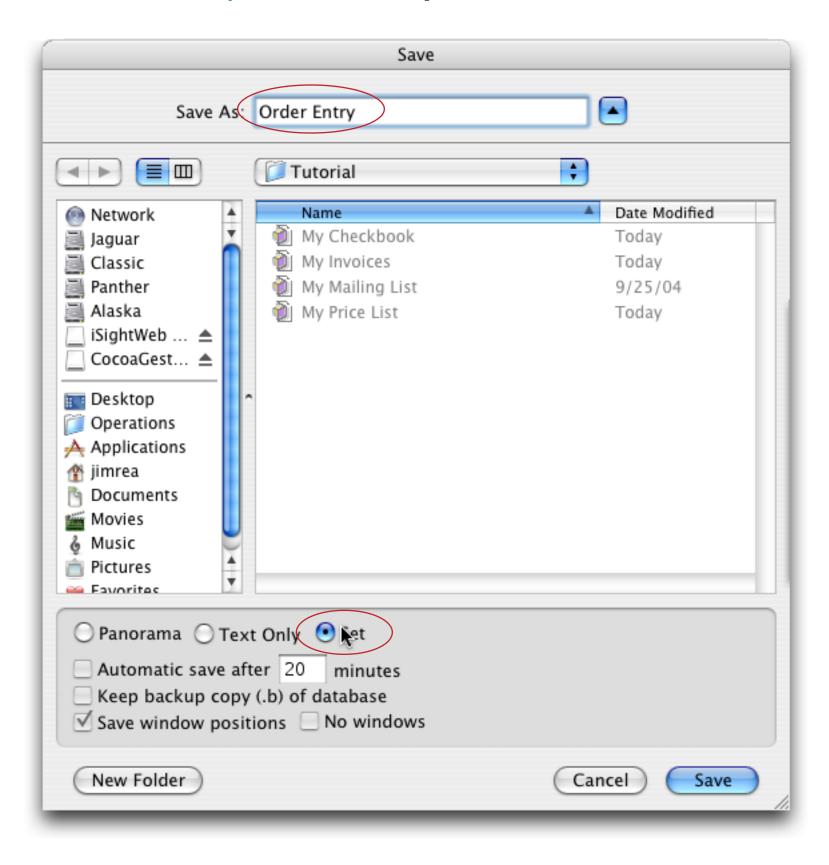
Clicking this button will trigger the procedure which adds the item to the invoice.

	My Invoices:Order Entry			2 B		
	Invoice # 1 Date 10/28/00		Qtyltem	Price	Amount	<b></b>
	Name Linda Bischoff		12Blue Medium Ball Point Pen	0.69	8.28	
	Company Mark Energy Co		3Pink Highlighter	1.19	3.57	
	Address 955 N. Harbor Cir.		5Memo Pad	3.39	16.95	
			12Paper Clips	1.59	19.08	
	Fresno	CA 93747	2Rubber Band Ball	2.39	4.78	
	Country		1 Postal Scale	19.95	19.95	
<b>▼</b>	Phone (209) 452-1355					
	1emo					
3~						
				Subtotal	72.61	
			Tax Rate 7.75		5.63	
				Shipping	- 70.04	_
				Total	78.24	-
Add Whi	1 visible/1 total 🛛 🖣 🎹					11/
Add Rubber Cem	ent 3.69					
	ent <u>5.65</u>					
Add Postal Scale	19.95					
Add Heavy Duty	Letter Folder 199.95					
Add Yardstick	2.19	=				
Add Steel Ruler	2.99					
Add Plastic Ruler	r 0.79	-				
65 visible/65 t						

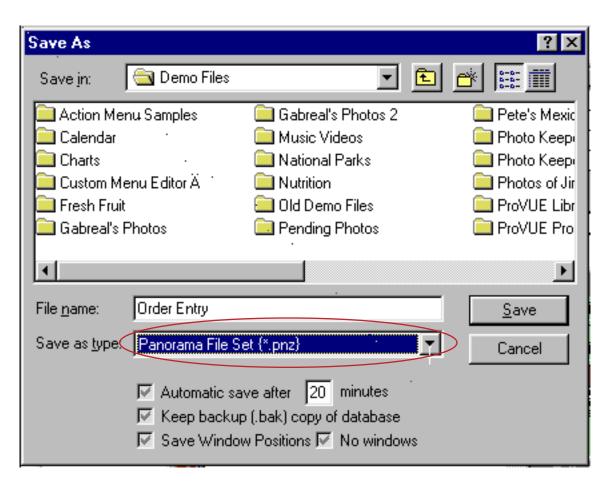
Now Save both databases and you are done.

#### Saving a File Set

Before continuing, make sure that the My Invoice and My Price List files are the only two databases open in Panorama. Then choose the **File Save** command from the File menu. Type in the name of the file set you want to create (in this case Order Entry) and click on the Set option.



If you are using a Windows PC computer use the combo box to choose the Panorama File Set {\*.pnz} option



Press the **Save** button to create the file set document.

	🔰 St	ep-by-Step		
5 items, 204.4 MB available				
My Checkbook Order Entry	My Invoices	My Mailing List	My Price List	
•			▶ 4)	

Later if you want to open both the My Invoices and My Price List files together you don't need to open them separately. Instead you can simply double click on the Order Entry icon, and Panorama will open both files automatically. See "<u>File Sets</u>" on page 92 to learn more.