

Navigation Tools

VisionX navigation tools consist of icons, keyboard keys, and menus. Icons are buttons which you click to tell the program to perform a certain function. Most of these buttons have a Keyboard equivalent executing the same function. You can either press the keys on your keyboard or click the icons in the window. You may already be familiar with some of the keystrokes which are standard with other programs. The functions performed by icons or keystrokes may also be activated from the 'Commands' menu.

Keyboard Commands

TAB	Moves the cursor to the next field. If you tab after the last field, the cursor moves back to the first field of the open window.
SHIFT-TAB	Moves the cursor to the previous field. If you shift-tab off the first field, the cursor moves to the last field of the open window.
ENTER	Saves the information entered on the screen. You can also use the Save button when displayed.

In most cases the RETURN key will have the same effect as the ENTER key. However if the cursor is in a multi-line text field, the RETURN key moves the cursor to the next line of this field adding a blank line below the existing text.











It is a good practice to avoid using the RETURN as a Save equivalent.

List Sorting










Some of the list screens offer several sorting preferences. The active sorting field is the column with an underlined heading. When additional sorting fields are available their headings are not underlined. By clicking any of these headings will prompt VisionX to display the current list according to the new sort field (index).

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June 12, 2008

BUTTON	FUNCTION	KEY	DESCRIPTION
Validation Buttons			
	OK/Save	Enter	Saves an entry or proceeds to the next window or function. Once this button is activated the data is written to the hard disk.
	Cancel	Esc	Cancels the current entry and takes you back to the previous screen. The Cancel function prevents the program from saving the entered information.
Navigation Buttons			
	First	⌘7	Displays the first record in the current datafile.
	Previous	⌘,	Displays the previous record.
	Next	⌘9	Displays the next record.
	Last	⌘0	Displays the last record.
	Find	⌘F	Enables the index fields of the current datafile and allows a quick find on the selected field.
	Search	⌘L	Displays a screen with various search criterias, or a list of all records in the current datafile.
Record Changing Buttons			
	New	⌘N	Adds a new record to the current datafile.
	Delete	⌘D	Deletes the current record.

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	Edit	 E	Allows for changes to the current record.
	Duplicate	 B	Duplicates the current record.
	Reverse	 R	Reverse the current record.
	Recurring		Displays the list of pre-defined recurring entries.
	Export		Exports the current data to a text file.
	Import		Imports data from a text file to the current datafile.

Sub-Record Changing Buttons

	New		Adds a record to the current list or sub-file.
	Delete		Deletes the current line or record.
	Add Space		Adds a space between after the current line.
	Move Line Up		Moves the current line one row up.
	Move Line Down		Moves the current line one row down.
	Edit		Allows for changes to the selected line or record.
	Duplicate		Duplicates the current line or record.
	Search		Displays a search option to retrieve multiple records from the current list or sub-file.

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Other Buttons



Lock

Locks the selected record.



Unlock

Unlocks the selected record.



Print

Prints the selected record or a range of records from the current datafile.



E-Mail

Sends an E-Mail to the selected record.



View Only

Set the current record as 'view only' status preventing further modifications.



Convert

Converts a record to a different status such as a sales lead into a customer.

Lookup Files

Throughout the program you will be able to search lookup files. VisionX allows you to implement the search by entering the start of a record ID (or account number), or the start of its name. You may also display the complete list of all records within the file.

As an example the Invoices screen will allow you to search the Customers and the Products files. When the cursor is in the Customer field, you may:

- leave the field blank and click the Lookup button to display a list of the entire customer file.
- enter the first characters of the customer ID/Account and click the Lookup button, or hit the TAB key, to display a list of all the customers whose ID starts with these first characters.
- enter the first characters of the customer name and click the Lookup button, or hit the TAB key, to display a list of all the customers whose name starts with these characters.
- enter the exact ID of the customer to directly load his/her data.

Once the list of matching records is displayed you may either double-click on the desire record, or highlight its line and hit the TAB key to load the record's data.



Lookup

Loads a list of matching records.