

Add, Edit, Find, & Delete data

Add and Edit data from the menu column

All application maintenance and transactions routines are similar in the method of adding or editing data. Selection from a menu column displays a window and if any data exists in the file, the first record appears, as well. The next step is to choose what to do with that data.

Choosing a menu selection where the data file contains records, allows the operator to immediately review those records using any of the enabled shortcuts. Once the first record of a data file is displayed, choose the

- ✓ “Add record” shortcut to add a new record
- ✓ “Edit record” shortcut to edit the displayed record
- ✓ “Exit” shortcut to return to the Menu column

Data files without any data, such as empty transaction files, display the window but still require the operator to identify the next step, such as using the “Add record” shortcut.

You can also utilize the “Locate record,” “Next record,” “Last record,” “Prior record,” or “First record” shortcuts to display a specific record in the entry window. Note that all shortcuts are displayed within the Records menu column for non-Windows environments and on the button bar for Windows.

Field maintenance from within an input window (^A Maintenance)

Each Down To Earth application includes a Maintenance menu column that is used most often for creating master records. In addition, within the transaction entry window, it is also possible to create a master record by using the “Field maintenance” (^A Maintenance) shortcut.

When the cursor is positioned on a code field within a window and you need to add or edit that code's master record, you can use the “Field maintenance” shortcut to create that code's master then immediately return to your original input window.

- ✓ Non-Windows environments display “^A(Maintenance)” on the Information line and require the key sequence, Ctrl-A, to display the Maintenance entry window for that code. Enter the code information, press <Enter> to complete input and write the new record to the file, then use the “Exit” shortcut to return to your original window.
- ✓ Windows environments display the Field name in a different color (**Green** is the default color.). Left click on the colored Field name to display the Maintenance

entry window for that code. When completed, use the “Update” shortcut to write the new record to the data file and the “Exit” shortcut to return to your original input window.

For example, if you are on the **Terms code** field in the Vendor Maintenance window of Accounts Payable, and you press the “Field Maintenance” shortcut, the Terms Code Maintenance window will be displayed as if “Terms codes” were selected from the Maintenance menu column.

Another example would be if you are entering orders via Order Entry and need to add a customer for this order. When the cursor is in the **Customer ID** field, use the “Field maintenance” function to display the Customer Maintenance window. In either case, enter the necessary data and when completed, use the “Exit window” function to return to the original window and field for more input.

Finding data - the “Locate record” and “Find” shortcuts



The “**Locate record**” shortcut is used when trying to locate a specific master or transaction record. Locating Name/Address master codes, such as for Vendor or Customer ID offer several options for searching and sorting the data such as name, zip code, and telephone number. Locating a transaction offers search options as well. An A/P invoice allows a search by vendor ID or Invoice number and a sales order, by either Order number, Bill to, Ship to, or Customer PO number.



Use the “**Find**” shortcut to search for a previously defined code during data entry if not already known. Most “Find” shortcuts do not offer search options but instead simply display a list of valid codes to use for data entry. These codes are usually system wide codes used for all companies such as Terms, Tax, Finance charge, Ship via, Location, and Ship to.

Not every field of entry allows the “Find” shortcut or every function the “Locate record” shortcut. Those routines and input window fields allowing the Operator to use these shortcuts are identified as follows:

- ✓ Non-Windows environments display the message, “Find(Locate)” on the information line when your cursor is placed in a field or the shortcut key is enabled when you pull down the Records or Input menu columns. Any keyboard equivalent defined for your system is displayed in the menu column list.
- ✓ Windows environments either indicate the “Locate record” shortcut is allowed by enabling the Binoculars button or displaying a Find button next to the field with three periods. Either click on the enabled button or use the equivalent keyboard key as noted when you pull down the Records menu column.

Getting around in the Results window: Use Up arrow, Down arrow, Next page/screen, and Previous page/screen keys, to view the records within the results window. You can also choose a record from the displayed list to bring into your

input window. To exit the list of codes without bringing a record into the input window, use the “Exit” shortcut.

- ✓ Non-Windows environments use the arrow keys to mark a record then press <Enter> to select that record and bring the data into your input window.
- ✓ Windows environments can choose to use the arrow keys to mark and press <Enter> to bring the marked record into the input window or double-click the mouse on the selected record.

FIND, within a FIND: The “Locate record” and “Find” shortcuts can display very long lists of resulting data. Both the Windows and Non-Windows environments have control-key sequences to search for a value within the results window. In addition, you can change the direction, disable case sensitivity, or do a partial pattern lookup.

- ✓ Windows **Ctrl-f** within the ‘results’ window, **Ctrl-n** next find, and **Ctrl-d** change direction
- ✓ Non-Windows **Ctrl-g** within the ‘results’ window, **Ctrl-n** next find, and **Ctrl-d** change direction

Wildcard search options: Data master records such as chart of accounts, vendor, customer, employee, OE ship to, and PO mail to, offer various options to search by such as search name (or description), telephone, zip code, city, or various codes within the record. Whatever field you choose to search is also used as the sort order for the resulting list.

You can use the standard wildcards, asterisk (*) and question mark (?), to search the data file for specific record set.

- ✓ The asterisk (*) serves as an ‘all data’ search wildcard. If you enter only an asterisk in a search field, all the data in file displays in order by the search field.
- ✓ The question mark (?) serves as a ‘single character’ search wildcard. If you enter a search value and include one or more question marks, the resulting list includes records where the questioned characters are any value.
- ✓ Any alpha value entered after (to the right of) the first wildcard does **not** check case. Any alpha value entered prior to (to the left of) the first wildcard is checked for case sensitivity.

Following are examples of different combinations and results of wildcard searches.

<i>Search entry</i>	<i>Search field</i>	<i>Result</i>
01?0	Account (Chart of)	Lists all accounts that start with 01 , have any character in the third position, 0 in the fourth position, and blanks in remaining positions. List sorts numerically by account number.
01* or 01	Account (Chart of)	Lists all accounts that start with 01 , regardless of the length. List sorts numerically by account number.
CA* or CA	Name	Lists all names that begin with Ca or CA . List sorts alphabetically by description.

4?222	Zip code	Lists all zip codes that begin with 4 , have any character as the second position, and the third through fifth position equals 222 .
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Search field priority: The search function priority is set from the first record key to the last. If a record key is more than a single field, it is noted in sections, separated by a single vertical line. Therefore, if the default ‘all data’ search field or section (displayed with an asterisk (*) in the field) is prior to the search field you choose, you must enter blank value (press <Spacebar>) in that field. For example, if searching the Name/Address by **Area** or **Zip** code, the **Search name** field must be blank. If you <Enter> through the **Search name** field entering an asterisk, the result ignores any data entered in subsequent fields.

Numeric vs Alphanumeric field searches: Most fields enabling the “Locate record” shortcut are alphanumeric fields. There are however, some numeric fields where the “Locate record” shortcut is allowed. Wildcards are not allowed in a numeric field search. You must search for an absolute field value or press <Enter> to leave the field blank to display all records from the file, starting with the first on file.

Master records search options: As noted before, master record searches provide several search and sort options and also offer the **Find, within a Find** option. Below are some examples searching for a customer within the “Name/Address” menu selection,

- ✓ Search for a customer by their **ID** number, enter that value in the **ID** field and use the “Fill defaults” shortcut for remaining fields.
- ✓ Search by their last name by pressing <Enter> in the **ID** field to move to the Search name field and enter their last name. If you only know part of their last name, enter what you know and the list displays all records that match with that value.
- ✓ Search by their telephone number by pressing <Enter> for the **ID** field, a space (<Spacebar>) to delete the asterisk in the **Search name** field, then enter their telephone number starting with the area code. The “Fill defaults” shortcut defaults through the remaining fields.

The specific fields displayed in the search result depends on the data file being read. For example, included in the display of a Vendor (Name/Address) search is: **Yes/No** if the Vendor is a **Vendor**, **Customer**, **Ship to**, **Mail to**, **Prospect** or **Group** record (**VCSMP?**), the ID code, name, and first and second address(es). The results window when searching for a Chart of Accounts number includes the year, account number, division, department, and description.

Transaction records search options: If you’re searching for any Transaction to change an existing record, you can use the “Locate record” shortcut to search for the record only by the (record) key for that transaction. To display the records beginning with the first on file, enter an asterisk (*) in any field choice.

For example, to display the transaction records in General Ledger beginning with the first **Reference** code on file, use the “Locate record” shortcut and enter an asterisk. For AP invoices, you can search by the **Vendor ID** and/or **Invoice** field values.

Once the transaction is displayed, field lookups within the transaction are also allowed when noted by enabling the “Find” shortcut. Some “Find” shortcuts allow a search for a record by field choices displayed. However, most “Find” shortcuts simply result in a list of available codes for that field..

Deleting a record & field values



If you have the required security access, you can delete records in Down To Earth using the “Delete record” shortcut. The Operator ID’s security definition also dictates confirmation options for deleting records. We recommend, however, that you exercise caution when using this function; entire records deleted cannot be retrieved through Down To Earth.



NOTE: The key/button designation for the “Delete entry” shortcut can be different on different systems. Verify your shortcut value by activating the menu bar and pull down menu columns from within an input window.

Deleting records: To delete an entire transaction, order, or master record, display the first input window for the record and use the “Delete record” shortcut. For example, to delete an entire General Ledger journal transaction, enter the reference of an existing record, the record is displayed, and use the “Delete record” shortcut.

Deleting a single detail line: To delete a single line of a multiple line type entry (customer sales order line item, A/P invoice distribution to G/L, transaction detail, etc.), mark/block (don’t select) the line from the List selection window and use the “Delete entry” shortcut. The sequenced record remains in the file and displayed in the window but is marked as deleted by the “ x ” to the right of the sequence number. Repeat this procedure to ‘undelete’ a sequence number.

Deleting field values: Deleting the displayed value within a single field is done by blocking the field contents and pressing the <Backspace> or <Spacebar> or use the single character <Delete> key from your keyboard.