



## **Modulus Technical Note #40 - Lists** (Amended 19/2/99)

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### INTRODUCTION

Many of the functions in the Data Manager, such as 'Stock Types', 'Movement Types' and 'VAT Codes', are used partly as 'look-up' tables from elsewhere in the system. More than standardising entries, however, they are used to determine how Modulus is to behave at a particular moment. For example, specifying a VAT Code of "S" is not merely done to ensure that the letter S is used at all times but also to determine that VAT of 17.5% is to be charged.

Some records stored in the Data Manager, however, are there purely to ensure consistency of data entry and have no additional implications. These are grouped together under the term "Lists", since their only use is to appear in selection or options lists. Examples are Titles, used when entering Contacts to specify Mr, Mrs, Ms, etc, and Terms, used when entering Invoices to specify Pay on Invoice, 30 days, etc.

Modulus is supplied with sample entries to the following Lists: Delivery Method, Payment Terms, Delivery Terms, Titles (Mr, Mrs and so on), VAT Prefixes, Advertisement Formats, Advertisement Colours, Quality Groups, Quality Sub Groups, Usage Groups, Usage Countries, Mailsort Types, Skill Levels and Info From. The List Name (see below) of these List records should not be altered.

### STRUCTURE OF LISTS

For each List item, only two pieces of information need to be entered. The List Name is used to specify to which List the new item is to be added. Examples might be Titles or Terms. The List Entry is the name of the item, such as Mr, Mrs, Pay on Invoice.

When entering a field with a List attached, such as Payment Terms on the Sales Order or Sales Invoice screen, Modulus will search for all List records with the appropriate List Name (Terms in this example) and will then display all records found in a selection window.

### SELECTING FROM LISTS AND MODIFYING LISTS 'ON-THE-FLY'

When you type something into a field that has a List attached and press <Return> or <Tab>, Modulus checks whether the text entered matches a List record for that

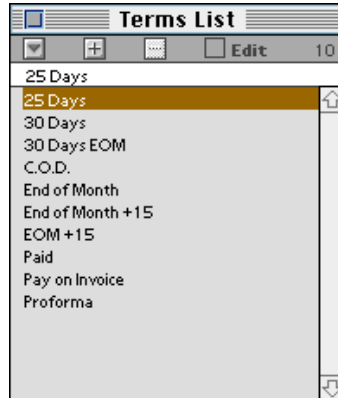
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field. If there is a partial or exact match with a single List record with the correct List Name, the full List Entry text of that record is placed in the field. If more than one List record matches what was typed, a selection window appears showing only those records. If you type a wildcard, the selection window contains all the List records for that field. The list can be sorted in the usual way.



If no match is found, the selection window will appear, containing all List Entries, and additionally, as a proposed new List record, the text just typed. The window will be in 'Edit' mode (described below). If you press <Return>, your text will become a permanent addition to the options list for that field. If you click the Close Box, the text will remain in the field but will not be added to the options list, thus enabling you to make adhoc entries without saving them. You can also choose a different option from the list, in which case your text will again not be saved. You must be given clearance to make 'Data Manager Additions' in your Personnel record to be able to make additions to the options lists in this way.

The selection window has two modes: 'Edit' and 'Select'. It will only be in 'Edit' mode by default when there is a possibility of adding a new option to the list as described above. When in 'Select' mode, you can use the arrow keys to select the correct option, followed by <Return>, or simply click an option with the mouse.

You can change to 'Edit' mode by clicking the 'Edit' check box. When in this mode, clicking on a line no longer closes the window, but selects the List record for editing in the white area above the list. If you change an Entry in this area, pressing <Tab> or the up or down arrow keys or clicking on any of the other buttons will confirm the change and update its line in the listing area below. Pressing <Return>, even while in 'Edit' mode will select the current choice and close the window.

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If your Personnel record has 'Data Manager Additions' clearance, you may press the [+] button at the top of the selection window to add new options to the list. New Entries are made using the white editing area and appear at the base of the list until the [Sort] button is clicked or the window closed and re-opened. The [-] button can be used only to remove lines just added (since the window was last opened). A message will otherwise appear telling you that other deletions need to be made using the 'Lists' function in the Data Manager. No change is saved until the window is closed. If you use the Close Box you will be asked to confirm whether you want to save the changes or not.

### MODIFYING LISTS IN THE DATA MANAGER

Selecting the 'Lists' item on the Core menu in the Data Manager brings up a list of List records, as shown below.

LISTS		144
List Name	List Entry	
Terms	Pay on Invoice	
Terms	25 Days	
Terms	30 Days	
Terms	30 Days EOM	
Terms	Paid	
Terms	C.O.D.	
Terms	End of Month	
Terms	EOM +15	
Terms	End of Month +15	
Terms	Proforma	
Titles	Mr	
Titles	Mrs	
Titles	Miss	
Titles	Ms	
Titles	Dr	
Titles	Prof	

For each List Name there are several records: these will appear together in the corresponding selection list as described earlier. One of the items in the list can be modified by double-clicking, or a new item created by clicking the [+] button. The resulting input screen appears as follows—



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**LIST ENTRY**

List Name

List Entry

Since the List system works by searching for all records with the same List Name, it follows that the List Name field is fairly important. If a typing error is made in this field, the item may not appear in the expected list. Therefore, this field itself accesses a options list, thus ensuring that the correct text is entered to the field. Type a wildcard or a partial code to obtain the options list. From this list can be chosen the list to which you wish the entry to be added. Then, enter appropriate text to the List Entry field and click [ ] or <Enter>.

For this system to work properly, you need to ensure that the selection list attached to the List Name field is kept up to date. The records of this list, which have "Lists" as their List Name, appear in the listing of current entries obtained when first accessing the 'Lists' function. When setting up a new List, for example, Terms (of Payment), you should ensure that an item is set up with 'Lists' as its List Name and 'Terms' as its List Entry. You might then end up with the following—

List Name	List Entry
Lists	Terms
Terms	Pay on Invoice
Terms	7 days
Terms	30 days

If you are setting up your own Lists for use with Further Fields (see below), it is important that you follow this model.

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Note that if you modify the List Entry of the first item shown in this list (for example, changing 'Terms' to 'Conditions'), upon saving, all records with a List Name of 'Terms' will automatically be altered to 'Conditions' to retain consistency. However, such a change should only be made to lists set up for your own purposes (ie, those attached to Further Fields), not to the standard lists as listed at the beginning of this Technical Note, otherwise the items will not appear in options lists as expected.

### LISTS AND FURTHER FIELDS

In many areas of Modulus you can add your own fields to store additional information if those provided with the system are insufficient for your requirements. These are termed 'Further Fields'. There is a separate Technical Note covering the setting up and use of Further Fields.

You can set up a List to ensure consistency of entry to your Further Fields. For example, you might attach a Further Field to your Companies named 'Importance'. Permitted entries to this field might be 'Very' and 'Not Very'. You can set up a List with these two values. There is no need to go to the 'Lists' function (although you can do this). Instead, when setting up the Further Field, enter "Importance" as the List or Format. If this was not an existing List, you can create it 'on-the-fly' as described above. When subsequently using the new field, additional options can be added to the 'Importance' List in a similar manner.

Note that Lists can only be attached to Further Fields of Type Alphanumeric (A) or Text (T).

