

Customizing the Record Tab

What is the Record Tab?

When you access a record in ContactEase, the lower portion of the screen contains record details. These details are visible inside specific tabs (as shown below). The Record tab is the default tab, and main data entry screen. It is also user definable, and can consist of any items existing in other tabs.

All of the data in the Record tab can be found in other tabs (Categories shown in the Address tab, phone numbers on the Phone tab, etc.). By entering information in the Record tab, it makes it easier to see the data most important to you.

A default record tab view is visible on all machines when installed with ContactEase. An unlimited number of custom Record tabs can still be created in the system; either for a single user or groups of users.

Because the Record tab is customizable, you can create different looks for different groups of users. For instance, a simple look has basic information for basic users; while an advanced view has more data for advanced users. The same approach can also be applied for different practice groups.

You can also change the form to make data entry easier (E.g. Organize fields in an order that is easy to input). Another advantage of this customization capability is individual users can create their own Record tab. This allows users to easily and quickly see desired fields without having to move to another tab.

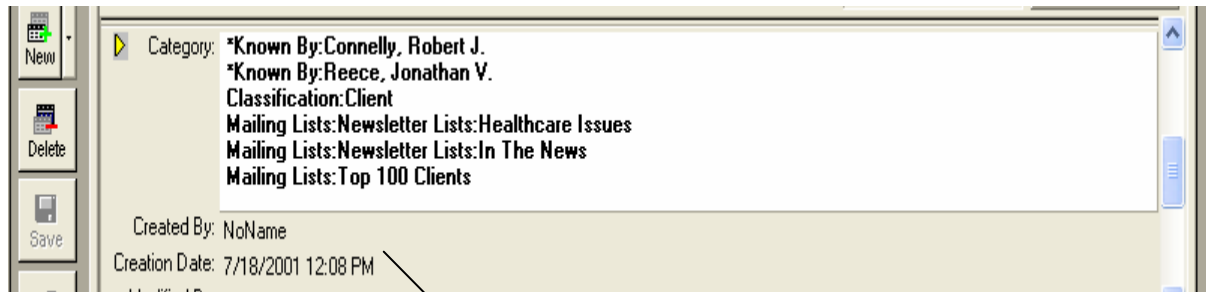
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The Record Tab is normally the first tab viewed for a Contact.



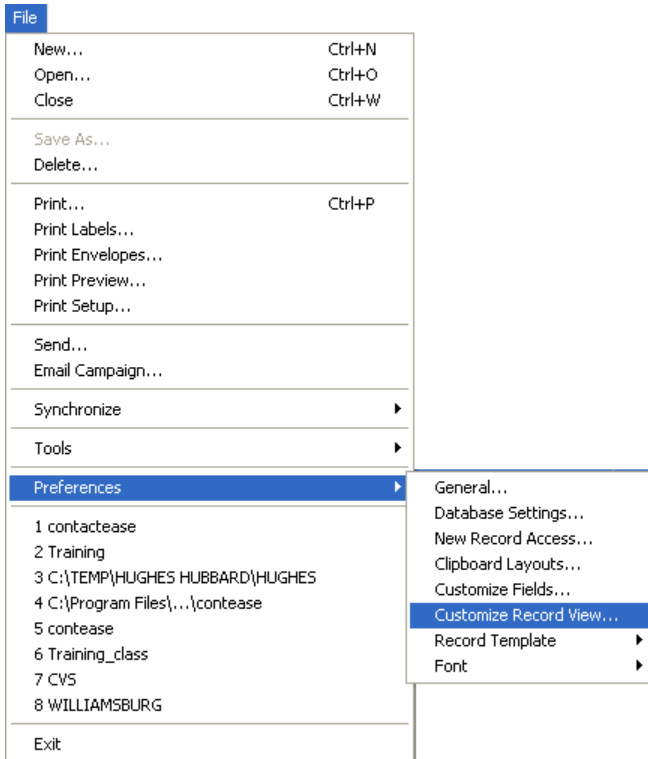
The Record tab is made up of three user definable panels: Top Right, Top Left and Bottom. You can select the data that appears on each of these panels, as well as arrange the order in which the information is displayed.



BOTTOM

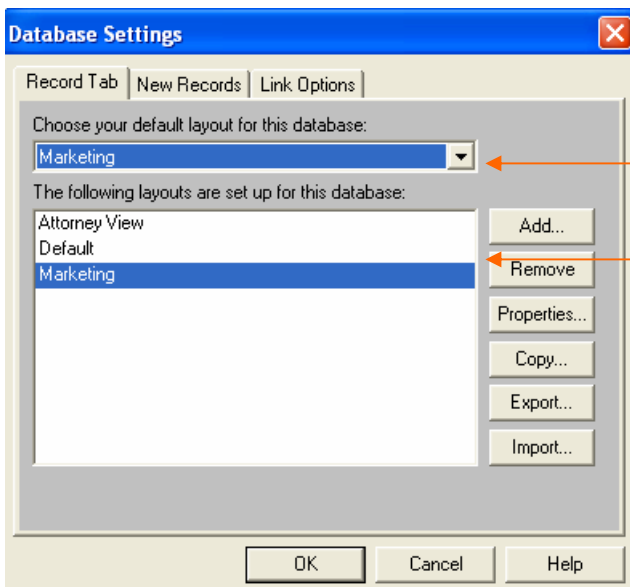
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In order to customize the Record tab, you must access the Database Settings of the system. Note: This function may impact other users of ContactEase; be careful when making changes to this display.



To add or modify the Record tab display, click *File*, select *Preferences*, and choose *Database Settings*.

This will open the Database Settings window.

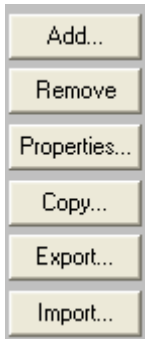


The layout shown is being used by the user.

A list of all pre-defined record tab layouts will display here.

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The default layout will display as illustrated above. You can use the drop-down list to change your default.



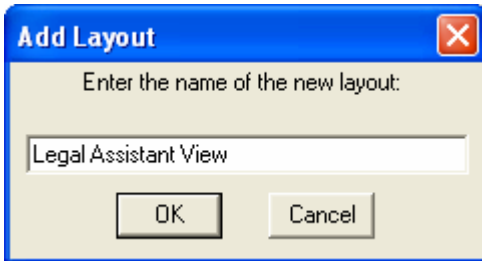
Use the *Add* button to create a new Record tab layout; or highlight an existing layout and click the *Copy* button to create a new layout based on the highlighted layout (you will be asked to provide a new name for this layout).

You can highlight an existing layout and click the *Properties* button to edit that layout.

You can also import and export layouts (we will not discuss these functions in this hint).

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Add a New Record Tab Layout



The Add Layout window asks for the name of the new layout. Type in a name and click *OK*. This then prompts the Customize Record View window; allowing you to select the items in each of the three panels.



Click on the tab for the panel you wish to edit, and check the items you want displayed. Note: Since these items also appear on other tabs, it is not necessary to always view the data on the Record tab.

To reposition an item, use the *Up* and *Down* buttons after highlighting the item. You can also reposition items by clicking and dragging. This will move the item on display as well as reposition its order in the Record tab.

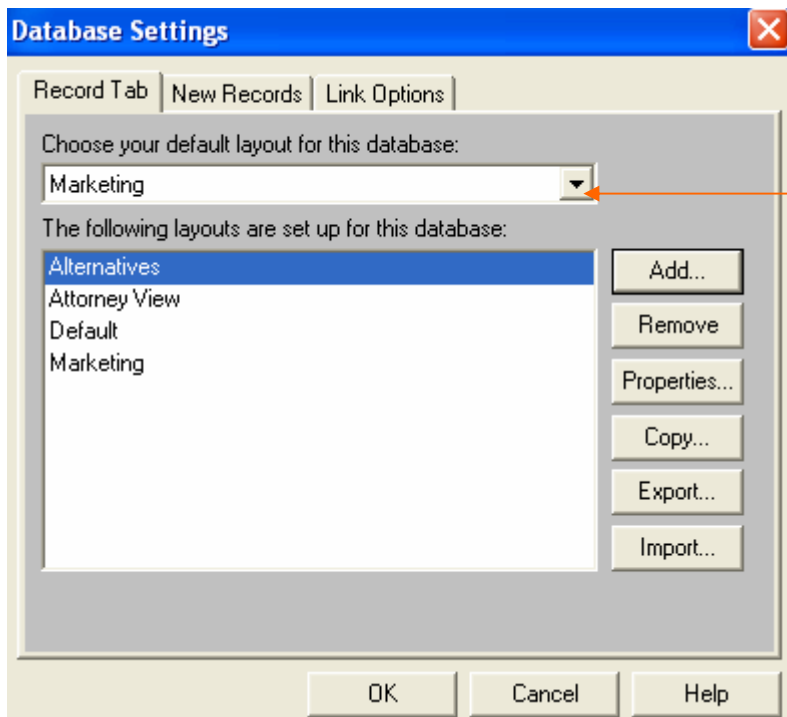
- 1) Select one of the three tabs: Top Right, Top Left, or Bottom
- 2) Choose which fields to display.
- 3) After selecting desired fields, click the *OK* button to save selections.

A new Record tab layout will now display on the screen. Note: The layout shown on screen must be selected under “Choose the default layout for this database”.

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View the Record Tab Layout

To view your results, choose the desired layout as the default layout for your computer; and then close the Database Settings window using the *OK* button.



1) Select the desired layout as the default for your machine.

2) Click the *OK* button. This action assigns this layout as the default view for this computer. It will remain the view until you access the Database Settings window, and change the view for your computer.

Edit An Existing Record Tab Layout

- 1) Highlight the layout name
- 2) Click the *Properties* button.

Make the desired changes and click the *OK* button to save the changes. Note: Changing a layout will impact other users who use that layout.

END OF HINT!