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Chapter 1

Advanced Navigation

The purpose of this chapter is to show you how data and resources are organized in Kinnexus, and how you can use Kinnexus navigation tools to access the desired information.

Knowing how data is organized within the program is helpful in navigating quickly and effectively in Kinnexus. In order to familiarize you with data organization in Kinnexus, the first section of this chapter describes the Navigator Window. The Navigator Window is the only navigation tool in Kinnexus that displays Kinnexus data in its natural hierarchy and is available at any point in the program. The remaining sections in the chapter describe other navigation tools and show you how to use them.

The Kinnexus navigation tools are:

• Navigator Window

• System Trays

• Next Step Bar

• Action Menu

• Most Recently Viewed list

• Action Bar

• Find User and Listing

Navigator Window

The Navigator Window appears between the system trays and the System Messages window. The Navigator Window is organized similarly to Windows Explorer, and functions like a filing cabinet. The folders and portfolios in the Navigator Window con-

tain all data and resources to which you have access. When you first open Kinnexus, the name of the person who is currently logged on appears at the top of the Navigator Window.

If you expand the current user, a list of the data and resources available to the current user displays. Some of the items that appear on this list include the current user's Listing Portfolio, Email Folders, Contact Information, and the Hot Sheet. Many of the items on this list can be further expanded to display additional data and resources. To view the contents of an item in the navigator window, you click the small plus sign next to it. This "expands" the item, displaying any data and resources associated with the item. You can also "collapse" an item, which hides any data and resources associated with the item.
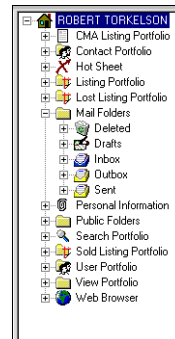
Navigator Window

The items in the second level of the navigator tree (the level just beneath the current user) are the same

for every user. The items in the second level are basically folders for storing information. The information in the subsequent levels, however, change from user to user. For instance, every user will have a Listing Portfolio in the Navigator Window, but the listings contained in the Listing Portfolio vary from user to user. The following table defines each second level folder in the Navigator Window:

Second level folder	What it contains
CMA Listing Portfolio	Listings for which you have run CMA searches
Contact Portfolio	Clients' and colleagues' contact information
Hot Sheet	Listings that have been modified since the last time you logged on
Listing Portfolio	Your inventory
Lost Listing Portfolio	Your listings that have expired or have been withdrawn
Mail Folders	Your email folders
Personal Information	Information about you (the current user), such as name, address, phone number, etc.
Public Folders	Public folders to which you have access
Search Portfolio	Searches you have saved
Sold Listing Portfolio	Listings you have sold
User Portfolio	User Information about those users for which you have the authority to make changes
View Portfolio	Views to which you have access
Web Browser	Access to the Internet

Turning the Navigator Window on and off

The Navigator Window can be turned on and off using the View>Navigator command. When the Navigator is visible, a check mark appears next to Navigator in the View Menu. When the Navigator Window is disabled, no check mark appears.

The following sets of instructions show you how to use the Navigator Tree to navigate Kinnexus.

To turn the Navigator on or off:

1 Click **View>Navigator**.

Expanding and Collapsing the Navigator tree

Clicking the '+' next to any branch in the navigator window expands that branch of the tree. Clicking the '-' collapses that branch of the tree. If you have expanded as much as there is to show in branch, the '+' simply disappears when you click it.

To expand a Navigator tree branch

1 Click the **+** sign next to the branch you want to expand. The **+** sign converts to a **-** sign and the branch expands.
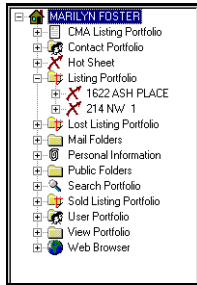
To collapse a Navigator tree branch

1 Click the **-** sign next to the branch you want to collapse. The **-** sign converts to a **+** symbol and the branch collapses.
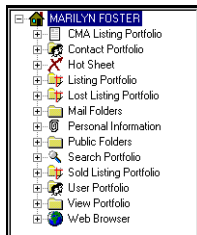
Jumping to a new location using the Navigator Window

You can use the Navigator window to jump to a new location in the program. Clicking directly on a branch takes you to the place in the program represented by the branch. The following instructions use the Listing Portfolio as an example of a location you can jump to using the Navigator Window.

To jump to a new location using the Navigator Window:

1 Expand the current user branch.
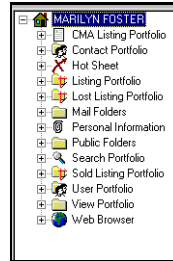
2 Expand the Listing Portfolio. Your listing inventory displays in the tree, but the view in the main window doesn't change.
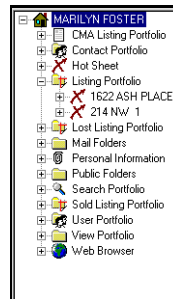
3 Click directly on the **Listing Portfolio** icon.The main window changes to show you your Listing Portfolio.
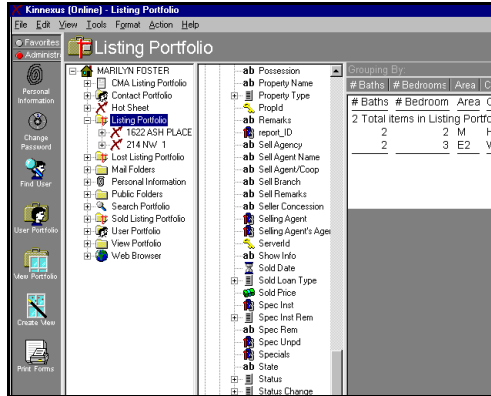
Tree icon	What it represents
	Wizard
	Web page

Navigator Window icons defined

Navigation Window tree icons

Each branch in the tree has an icon. The following table contains each icon and what each one represents. Since the system administrators have the ability to change the icons, this reference might contain different icons than the ones you see on your screen.

Tree icon	What it represents
	The Home Page
	A Folder or Portfolio
	Report
	Listview

Navigator Window icons defined

Other Kinnexus navigation tools

Unlike the Navigator Window, the other Kinnexus navigation tools are only available in certain locations within the program. The following sections tell you where to find the Kinnexus navigation tools, and how to use them to get from here to there in Kinnexus.

System trays

System trays contain commonly used tools and commands. System trays separate tasks and tools into groups based on the their function. The Listing tray, for example, has all of the functions and tools that are relevant to maintaining your listing inventory. The exception to this rule is the Favorites system tray. You can decide what commands and tools appear on the Favorites tray. For more information on the Favorites tray, see chapter XX. To use a tool or perform a task in a system tray, you simply open the desired system tray by clicking the appropriate system tray tab. Once the tray is open, you click the icon in the tray that represents the desired task or tool. System trays are located on the left side of the Home Page.

To use the system trays to navigate Kinnexus:

1 Click the desired system tray tab.
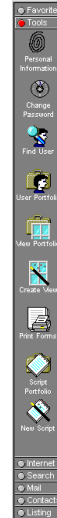
2 In the system tray, click the icon representing the tool or task you wish to use.
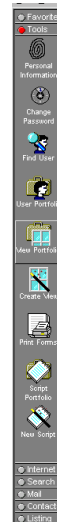
Next Step Bar (NSB)

The Next Step Bar (NSB) appears at the bottom of the main window when the main window contains a view. The NSB contains buttons representing available commands that change depending on where you are in the program. For example, the Overview Map button appears only when a list of search results is open in the main window.

The placement of buttons on the NSB tells you what the button does. Buttons on the left of the NSB are commands. Buttons in the middle of the NSB take you to new locations in the program. Clicking the button on the far right of the NSB takes you up one organizational level in the Navigation Window tree. If there are more options available than can fit on the NSB, small arrow buttons let you scroll through all the NSB buttons.
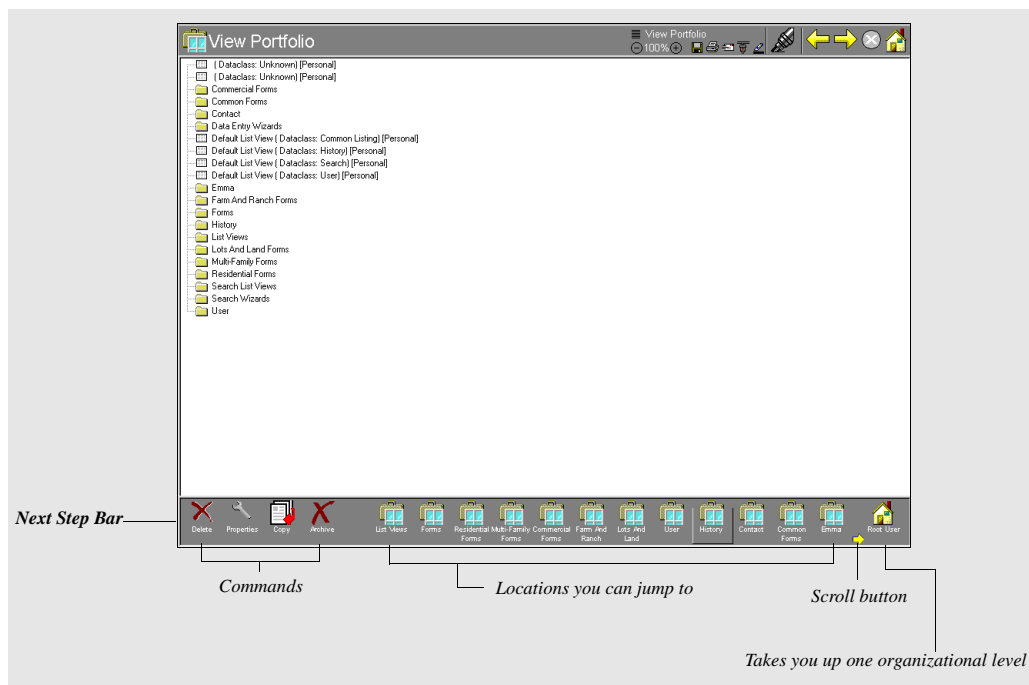
Turning the Next Step Bar on and off

The Next Step Bar can be turned on and off using the View>Next Step Bar command. When the NSB is visible, a check mark appears next to NSB in the View Menu. When the NSB is disabled, no check mark appears.

To turn the Next Step Bar on or off:

1 Click **View>Next Step Bar**.

Most Recently Viewed (MRV) list

Kinnexus keeps track of everywhere you have been in the program and allows you to return to any step along the way. Instead of having to click the Back and Forward buttons repeatedly, you can use the Most Recently Viewed list to go directly to the desired location.

With the exception of the Home Page, the Most Recently Viewed (MRV) is found in the upper left corner of each Kinnexus page. The list usually displays the current location only, but if you click the name of the current location, a drop down list containing all the locations you have visited during the current session displays.
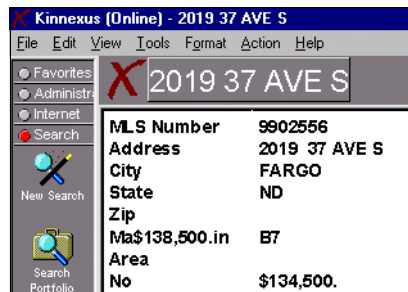
Current location title
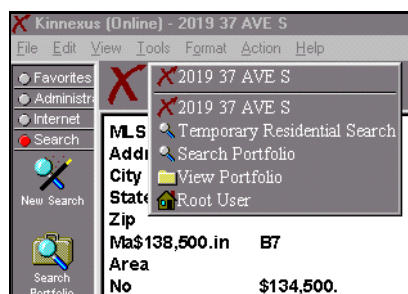
Most Recently Viewed list

To view the MRV:

1   Click the current location title.   The MRV list displays.

Returning to a previously visited location using the MRV list

The MRV list contains a list of the locations you have visited so far during the current Kinnexus session. You can click on any of the items in the list to return to that location. The MRV list can contain up to fifteen locations. Use the Back button if a location you have previously visited does not appear on the MRV list.

To return to a previously visited location:

1   Click the current location title.

2   On the MRV list, find the location you want to return to.
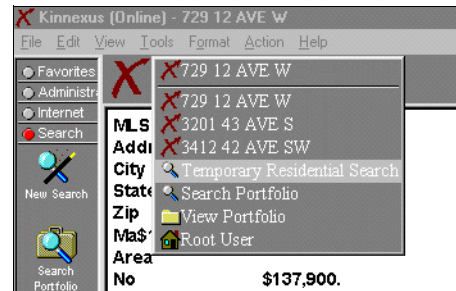
3   Click the desired location on the MRV list dropdown list.

Back and Forward menu

The View menu contains options for moving back and forward in Kinnexus. The Go Back and Go Forward menu options can be very useful, because the MRV list and Back and Forward buttons are unavailable from the Home Page. In order to return to a

location you visited before or after visiting the Home Page you must use a command on the View menu.

The View menu has two navigation options: Go Forward and Go Back. Go Forward enables only after you have gone back using the menu option, MRV list, or the Back Button on the Action Bar. Go Forward takes you to the location you visited after visiting the current location for the first time. For example, say you open your View Portfolio and then open a List View within the Portfolio. If you return to the View Portfolio, you can click View>Go Forward to get back to the List View.

Go Back takes you to the location you were at just before you visited the current page. The Go Back option is not available from the logon Home Page.

To go back or forward using the View menu:

1 Do one of the following:

• To return to the location you visited after visiting the current location for the first time, select **View> Go Forward**.

• To return to the last location you visited, click **View>Go Back**.
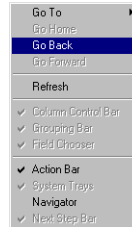
Action Menu

The Action Menu contains a list of available commands for the current location. These commands are identical to the commands located at the left of the Next Step Bar.

To perform a task using the Action Menu:

1 Click the **Action** menu.

2 Select the desired task from the pop-up menu.
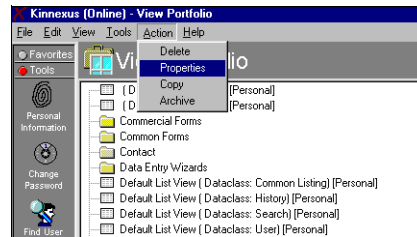
Action Bar

The Action Bar contains commands that affect the data in the main view. For example, if there is a List View in the main window and you click the Print button on the Action Bar, the List View will print. The following table defines each button on the Action Bar:

A Current View Indicator Tells you the name of the view in the main window. Clicking the Current View Indicator displays all available views and allows you to select one.

B View Mode Lets you choose a mode (preview or draft) in which to display view data.

C Zoom Makes the data in the main view larger or smaller. The '+' button makes the data larger, the '-' button makes the text smaller. You can also click the percentage between the '+' and '-' signs and select the desired zoom from the pop-up menu that appears.

D Save Saves the information currently in the main window.

E Print Prints the view in the main window.

F Attach View Automatically attaches the view currently in the main window to an email message which you can then address and send.

G Connect Connects your computer to the Kinnexus server.

H View Highlighters Lets you hide records that have been highlighted a certain color.

I Highlighter Selection Reveals a list of highlighter colors you can apply to selected records.

J Back Returns you to the last page you viewed.

K Forward Takes you to the next screen. Only enabled after you click the Back button.

L Cancel Cancels the current action.

M Home Page Returns you to the Home Page.

ACTION BAR

To Do List

The To Do List appears on the right side of the Home Page. It contains a list of tasks you perform of check frequently, like the Hot Sheet, new email, and saved searches.

To Do List

When you click an item in the To Do List, you are taken to the place in Kinnexus where that item is managed. For example, if you click on the Hot Sheet item in the To Do List, Kinnexus opens the Hot Sheet, which contains a list of new and modified listings.
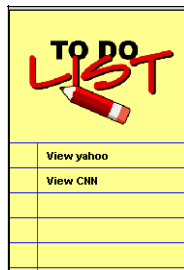
The To Do List items can link to the following items:

- The Hot Sheet
- New Email messages
- Your listings that are about to expire
- New results for saved searches
- Internet pages

To use the To Do List:

1 If you are not currently on the Home Page, click the **Home Page** button on the Action Bar.

2 Click the item in the To Do List that you would like to open.

Finding

The Kinnexus find features allow you to easily retrieve data about individual users and listings. For example, if you need the phone number of another realtor in your board, you can enter the realtor's name in the Find User wizard, and Kinnexus will retrieve that user's contact information. Finding a listing is much the same, except that instead of locating a Kinnexus user, you can locate an individual listing.

To find a user:

1 Click the **Tools** tab.

2 Click the **Find User** icon.

3 Enter as much information as you can about the user in the fields on the first wizard page.

4 Click the **Next** button.

5 From the window at the left of the page, select the user you are trying to find. The fields on the right of the page automatically fill in.

6 Click the **Finish** button. The selected user's personal information appears.

To find a listing:

1 Click the **Tools** tab.

2 Click the **Find Listing** icon.

3 Enter as much information as you can about the listing in the fields on the first wizard page.

4 Click the **Next** button.

5 From the window at the left of the page, select the listing you are trying to find. The fields on the right of the page automatically fill in.

6 Click the **Finish** button. The selected listing displays.

Chapter 2

Advanced Searching

This chapter shows you how to use the following Kinnexus advanced searching options:

- Search Options Page
- Search Criteria Form.
- Relevancy
- Data types

Because this chapter assumes familiarity with searching basics, please refer to the *Searching* chapter in the *Beginner's Manual* if you are not yet comfortable searching in Kinnexus.

Advanced search options on the search Wizard

In *A Beginner's Guide to Kinnexus* manual, you learned how to run basic searches in Kinnexus using a wizard. Because of the introductory nature of *A Beginner's Guide to Kinnexus*, there were several features on the first page of the basic search Wizard that were not described. The following paragraphs show you how to use the features on the first page of the search Wizard, known as the Search Options page.

To open the Search Options page:

1 Click the **Search** tray tab.

2 In the Search tray, click the **New Search** icon. The search Wizard opens at the Search Options page.

Search Options page features

On the Search Options page you select which record type and Wizard you wish to use, and set your advanced search options using the controls at the bottom of the Wizard. If you want to create a saved search or run a relevancy search, you must select these features from the Search Options page.
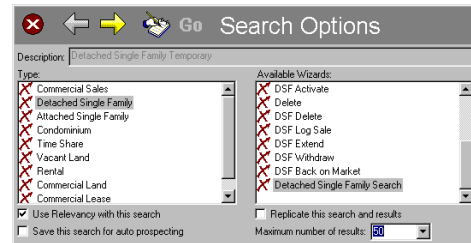
Search Options page

Type

The Type window, containing all the different record types available, is displayed at the left side of the Search Options page. Select the record type you wish to search. Most record types describe property types, such as Commercial and Residential. If you wish to search across all property types, select Common Listing from the Type window.

To select a type:

1   In the Type window, select the record type you wish to search.

*Note*: *If you choose Cross Property from the Type window, you will not be able to add type-specific fields to your search results, or change the search results List View to a property-type-specific form.*

Available Wizards

The right side of the Search Options page shows the customized Wizards that are available for the selected record type.

To select a wizard:

1   In the Available Wizards window, select the wizard you want to search with.
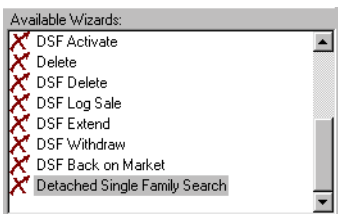
Use Relevancy with this search

Relevancy searches allow you to specify which criteria in the search are most important. In a relevancy search, you give each desired criterion an importance value. The higher the importance value, the more important the criteria item is to the overall search. Items assigned the lowest value are considered of no importance—whether or not the search meets those criteria does not matter. Items assigned the highest value are required. Relevancy is discussed at greater length on page XX.

To use relevancy in your search:

1   Place a check mark in the **Use Relevancy With This Search** check box on the Search Options page.
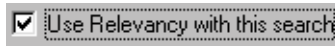
Save this search for auto prospecting

A saved search remains in your Search Portfolio until you delete it. Saved Searches are continuously updated, and new results are displayed in the To Do List. You can return to a saved search to review the list of results. You must be online to work with saved searches.

Most of your searches should be temporary searches. Temporary searches don't clutter the server with information you don't really need. Each time you create a new temporary search, the previous temporary search of the selected property type is replaced.

To designate a saved search:

1   On the Search Options page, place a check mark in the **Save This Search For Auto Prospecting** checkbox. If you leave the checkbox empty, the search will be temporary.
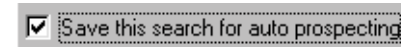
Maximum number of results

When running a search, you can limit the number of search results to a specific number. We recommend limiting the number of search results particularly when you are running a relevancy search.

To limit the number of search results:

1 Do one of the following

• Click the **Maximum number of results** drop-down arrow and select a number from the drop-down menu.

• Click in the **Maximum number of results** field and type the desired number.

Search Criteria Form

You access the Search Criteria Form by clicking the Exit to Form button on the Basic Search Wizard. The Search Criteria Form can contain many more search criteria fields than the Basic Search Wizard. If you do not find a search field on the Wizard, chances are better that it is on the Search Criteria Form.
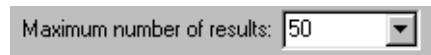
The Search Criteria Form resembles a data entry page and consists of criteria fields into which you can enter search criteria. Search Criteria Form criteria fields lie between brackets. This is a sample por-

tion of what a Search Criteria Form may look like, although the forms vary from board to board:
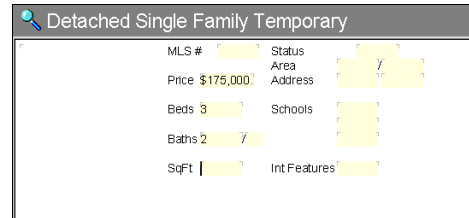
Search Criteria Form

To open the Search Criteria Form:

1 Click the **Exit to Form** button on the search Wizard.

The Search Criteria Form appears. Any information you have already entered into search Wizard fields before you clicked the Exit To Form button displays in the appropriate field(s).

Entering data on the Search Criteria Form

Just like in the Wizard, each criteria field on the Search Criteria Form is designed to accept criteria of a certain data type. For example, let's say the Zip field on the Search Criteria Form is a text box. To

enter a zip code into the field, you click in the Zip field and type the desired zip code.

Entering text into a Search Criteria Form field

Let's also say that the Area field is a listbox. When you click the Area field, a listbox pops up. You can then select the desired area from the list and then close the box.

Entering list box data into a search criteria list box

To enter data in the Search Criteria Form:

1   Click between the brackets of the desired field, or use the **TAB** key to navigate between fields. You can edit as many fields as you wish.

2   Enter the desired data. If you are not sure how to enter data for the field's data type, see *Data Types* on page XX.

3   If the field is a list box, feature box, or Boolean field, click the **Finish** button on the pop-up dialog.

Returning to the search Wizard from the Search Criteria Form

Once you have entered all the desired criteria on the Search Criteria Form, you can run the search from the Search Criteria Form or the Wizard. Whether you are in the form or the Wizard doesn't matter; Kinnexus searches the criteria entered on both form and Wizard. If you entered different information for the same field on the Wizard and Search Criteria Form, the Wizard searches for the last criteria you entered before running the search.

To return to the search Wizard from the Search Criteria Form:

1   Click the **Criteria Wizard** button on the Next Step Bar.

To run a search from the Search Criteria Form

1   Click the **Go** button on the Next Step Bar.

Relevancy searches

Relevancy searches are an advanced way of searching the Kinnexus database. In a relevancy search, you give each criterion an importance value. The higher the importance value assigned to a criteria

field, the more important the criteria item is to the overall search.

About relevancy

When you run a relevancy search, Kinnexus performs the search in two parts. First, Kinnexus finds all the listings that match the required criteria. Second, Kinnexus goes through each of the potential results and compares them against the importance values assigned to the non-required criteria. Kinnexus awards points to listings according to how well they match the importance values assigned to the search criteria.

To designate a relevancy search:

1   Select the **Use relevancy with this search** check box on the Wizard Search Options Page.

☑ Use Relevancy with this search
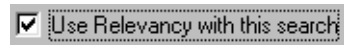
Relevancy score indicator

You can assign relevancy values in a basic search Wizard or a Search Criteria Form. When you designate a relevancy search, Kinnexus places the relevancy score indicator at the top left of all fields on the Wizard or form. This way, you can tell at a glance the relevancy value of any field.

Note: On the Search Criteria Form, relevancy score indicators appear only above fields that contain some data.
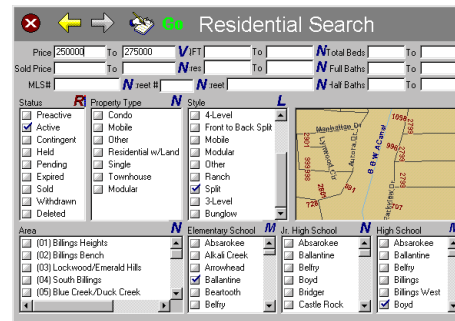
Search criteria page with relevancy indicators

To assign or change a relevancy value:

1   Click the relevancy score indicator above the desired field. Clicking the relevancy score indicator toggles through the relevancy scores. Keep clicking until you arrive at the desired relevancy value.

Relevancy Values

Symbol	Meaning	Point value
N	No Importance	1
L	Low Importance	4
M	Medium Importance	9
H	High Importance	16
V	Very High Importance	25
R	Required	

Relevancy database field

The Field Chooser contains a Relevancy field. Adding the Relevancy field to a view containing relevancy search results shows you how well each search result matches the relevancy search criteria.

The Relevancy field displays the percentage of points each listing received compared to the total available points. For example, if a property meets all the relevancy search requirements, the relevancy field displays 100% for that listing. Listings that don't match the search and relevancy criteria as well receive lower percentages, such as 74%, or 30%, depending on the relevancy points they received.

You can even sort by the relevancy field in a List View. If you sort in descending order, the results with the highest percentages, (or in other words, the best matches) display at the top of the list of search results.

To add the Relevancy field to a view

1 Add the relevancy field like you would any other, by dragging the field from the Field Chooser to the view. For detailed instructions on adding fields to Comparison Views, see page XX, for detailed instructions on adding fields to Reports, see page XX. For instructions on adding fields to List Views, see page XX in the Beginner's Guide to Kinnexus.

Searching data types

Each search criteria field, whether on a Wizard or Search Criteria Form, is designed to accept criteria of a certain data type. There are several different types of data you can enter in Kinnexus search criteria fields. Search data types include numbers, dates, text, list boxes, feature boxes, and Boolean fields. Entering criteria for each data type is different. The following section defines each data type and tells you how to enter criteria for each one.

Numbers

Two different controls allow you to search numbers: the range control and the text box. The range control allows you to put a minimum value in the left box, and a maximum value in the right box. Range controls are not available on the Search Criteria Form.

Price 175000   To 200000

Range control

A text box has only one field and allows numbers and expressions to be used as criteria.

Street Rosewood

Text box

Below are some examples of how numbers and expressions can be used in text boxes. More information on expressions can be found in the *Expressions* chapter, page xxxx.

To get this	Enter this in Price field
Listings between $100,000 and $200,000	100000-200000
Listings less than $200,000	< 200000

Numbers

Listings over $500,000	> 500000
Listing over $100,000 and under $200,000	(this > 100000) && (this < 200000)
Listings where current price is greater than the initial listing price	current price > listing.listprice

Numbers

Note: When entering numbers as prices, you don't have to type the currency sign or commas. If the field has been designated a currency field, Kinnexus automatically fills in the dollar sign and commas for you.

Text

Text can be entered into text boxes. To enter text, you simply click in the field and type the desired characters. However, using text as a search criteria can be complicated because to a database, *Maple Street* and *Maple St.* are different streets. To help you search text effectively, you can use an asterisk (*), or 'wild card'. Placing an asterisk at the beginning and end of the search text tells Kinnexus, "Look for this pattern somewhere in the field." Below are some examples of how the wild card can be used when searching text.

To get this	Enter this in Street field	Possible matches
All Listings on King Drive	*King*	King Drive, King Dr., King Street, Buckingham Rd., Kingsbury
All Listings on King, Cedar, or Sherwood	*King*, *Cedar*, *Sher*	King Drive, Cedar Ave., Sherman, Shertliff, King's Court

Text

To get this	Enter this in Street field	Possible matches
All listings beginning with King	King*	King Lane, King's Court, King Street, Kingsbury

Text

Dates

Kinnexus allows you to search for specific dates and date ranges. Dates can be entered into text boxes. Below are some examples of how to search for dates.

To get this	Enter this in Sold Date field
Listings sold from Oct. 1 to Dec. 31, 1999	10/1/99 - 12/31/99
Listings sold since November 1	> Nov 1
Listings sold in the last three months	current-3m

Dates

Note: If you don't enter a year value when entering a date, Kinnexus assumes you are searching the current year.

List Boxes

A list box presents a list of checkbox options. When searching list boxes, you designate which list box

items you want to search for. You can select as many checkboxes as you want.

List box

Feature Boxes

The feature box interface is similar to the list box interface, but there are three states to feature box checkboxes. Clicking a checkbox changes the type of mark in the box.

Feature	What it means	Search function
☐ Porch Covered	I have no preference on this feature.	Does not affect the search
☑ Porch Covered	I definitely want this feature	All search results will have this feature
☒ Porch Covered	I definitely don't want this feature	No search results will have this feature

Feature boxes

Match control

A match control appears at the top right corner of every feature box. Using the match control, you can designate how many of the selected items in a feature group the search must match.

You can have Kinnexus match 1, 2, 3, or All selected items in a feature box. If **All** is selected, a

property has to meet all the feature box criteria in order to be included in the search results. If **1** is selected, only one of the selected features in the feature box has to match.

To select a match control value:

1 Click the match control until the desired value displays.

Match control

Boolean fields

Boolean fields contain only one feature checkbox.

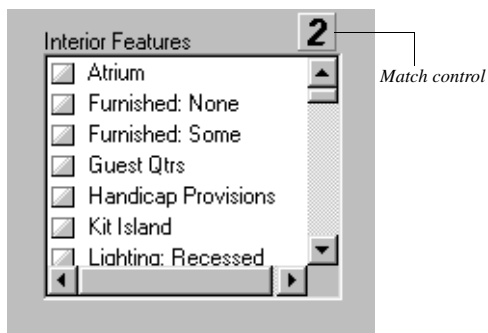| Feature	What it means	Search function
☐ Porch Covered	I have no preference on this feature.	Does not affect the search
☑ Porch Covered	I definitely want this feature	All search results will have this feature
☒ Porch Covered	I definitely don't want this feature	No search results will have this feature

Boolean

Chapter 3

Views

Views

Views are convenient, easy-to-read formats for
viewing data in Kinnexus. Some views are tailored
for clients, while other views are geared towards the
Realtor. This chapter gives you an overview of how
views are created, stored and managed.

In total, there are four different views: View Portfo-
lio

List Views

List Views present data in rows and columns that
you can select, edit, and group. A list of search
results is an example of a List View.

List View

Comparison Views

Comparison Views combine the functionality of a
List View with the presentability of a Report. Com-
parison Views resemble List Views in that they let

you select, edit, and group information, and resem-
ble Reports in that they are attractively laid out for
distribution to potential buyers. Items in a Compari-
son View are displayed in rows horizontally, rather
than vertically in columns.

Comparison View

Presentation Views

A Presentation View is really several different views
combined into one view. For example, a Presenta-
tion View might contain a List View, a Report, and a
Comparison View. A Presentation View presents
each view separately, but lets you add title pages,
tables of content, and boilerplate forms to tie the
views together. Presentation views are convenient

for longer, detailed presentations and are commonly used in MLS books and CMA packets.
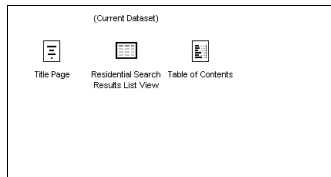
Presentation View

Report Views

Reports allow you to present property information to potential buyers in attractive and useful ways. Using the Kinnexus Report Editor, you can create custom flyers, data information sheets, and other reports for your customers

Report view

Wizard Views

Wizards help you perform particular tasks in Kinnexus. For example, a search Wizard leads you through the steps of a running a search. A listing Wizard takes you through the process of adding a listing.
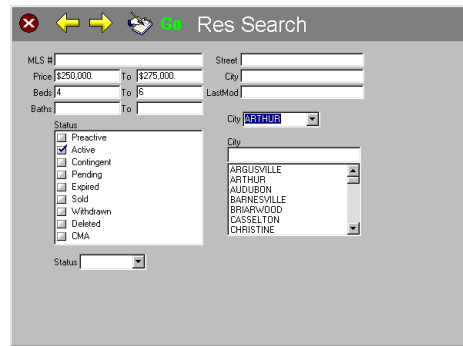
Wizard view

View Portfolio

The View Portfolio contains all the views to which you have access. Next to each view in the portfolio the view's dataclass and security access appears. Double-click on any view to open it. You can right-click any view in the portfolio and open the view's properties dialog. Views in the View Portfolio are displayed in tree form. To see the views that are in categories, you need to open the view's category folder by double-clicking it.
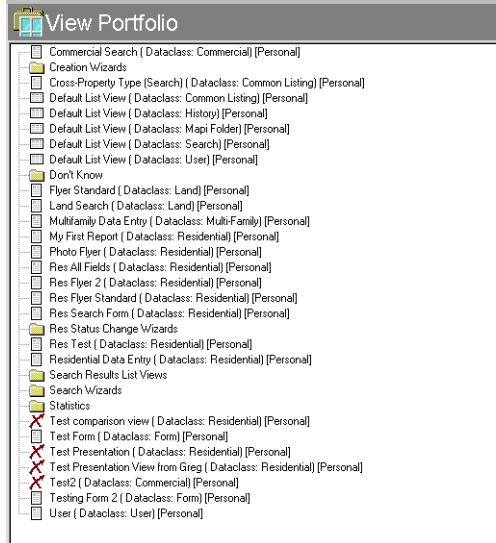
Creating a new view

You can create a new view in Kinnexus at any time. Most users will have the ability to create new views, although it is possible that your system administrator has disabled the Create View icon.

To create a new view:

1   Click the **Tools** tray tab.

2   Click the **Create View** icon. The New View Wizard appears.

3   Select the desired view type from the View Type window.
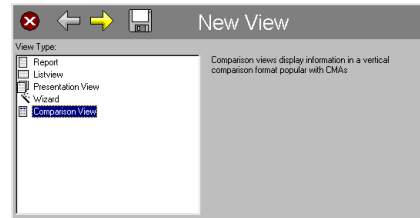
4   Click the **Next** button.

5   Click the **Category** drop-down menu and select a category from the drop-down menu, or you can click the **Category** field and type a new category if you would like the view to be assigned a category. Leaving the Category field blank means that the view will show up independently in the View Portfolio. Selecting a category places the view in a category folder in the View Portfolio.

6   Click in the **Description** field and enter a description for your view. This description becomes the name of the new view.

7   Select a dataclass for the view from the View Dataclass window. The view you are creating will be available only for the dataclass you select on this step.

8   In the Availability Status window, select those data types you would like available for viewing with the Presentation View. The Availability Status checkboxes represent types of data you can view in Kinnexus, such as data entry, search result, and search criteria data. For example, if you select the Search Results Summary checkbox, the view you

are creating will be available when you are viewing search results.
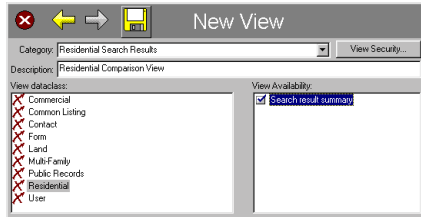
9 Click the **Save** button. Your new view saves in the View Portfolio.

VIEW PROPERTIES
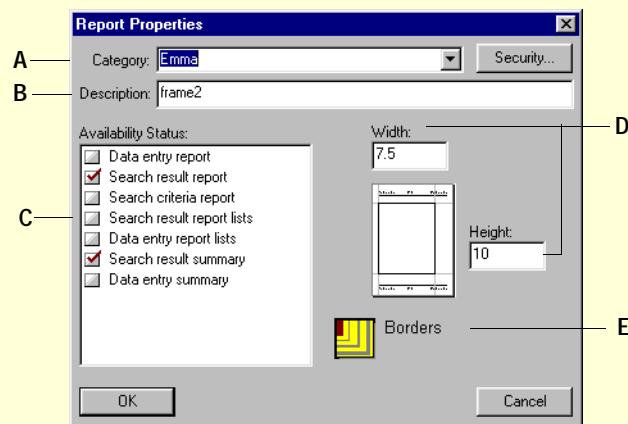
A Change the view's category by clicking the Category drop-down arrow and selecting the desired category from the drop-down menu.
B Change the view's description by clicking in the description field and typing a new description.
C Select different availability status options by placing and removing checkmarks next to the desired checkboxes.

D Change the view's width and height by typing the desired values in the Width and Height fields. Width and height are measured in inches.
E Change the view's border settings by clicking the Borders button.

Editing existing views

You can edit the properties of any existing view to which you have adequate security access. For example, you can change the name or width of a view.

To edit an existing view:

1 Click the **Tools** tray tab.

2 Click the **View Portfolio** icon.

3 Select the view you want to edit.

4 Click the **Properties** button on the Next Step Bar.

Deleting views

You can delete any view to which you have adequate security access.

To delete a view:

1 Click the **Tools** tray tab.

2 Click the **View Portfolio** icon.

3 Select the view you want to delete.

4 Click the **Delete** button on the Next Step Bar.

Copying views

It is very possible that you will come across a view that has some, but not all, the elements that you need. Instead of creating a new view containing all the desired elements from scratch, you can make a copy of the view. A copy is an exact replica of the view. Since the copy is identical to the view you copied it from, you can preserve the elements you want, and make changes and additions. For example you can add, remove, and rearrange the fields, or change the font settings.

When you make a copy, the copy is saved in the View Portfolio as *Copy of* followed by the name of the view you copied. For instance, if you copy a view called Residential Flyer, the copy is saved as *Copy of Residential Flyer*.

To copy a view:

1 Click the **Tools** tray tab.

2 Click the **View Portfolio** icon.

3 Select the view you want to copy.
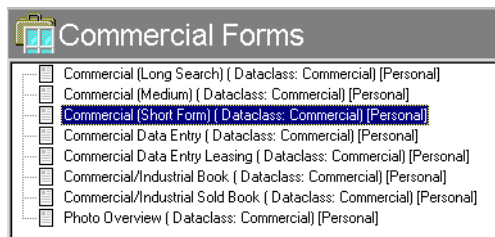
4 Click the **Copy** button on the Next Step Bar.
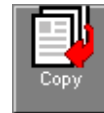
Current View Indicator

The Current View Indicator on the Action Bar tells you at a glance the name of the view that is currently displayed in the main window. If you click the Current View Indicator, a complete list of the views available for viewing the current data displays. To select a different view in which to display the data, you can simply select a view from the Current View Indicator list.

To select a new view using the Current View Indicator:

1 Click the **Current View Indicator**.

2 Select the desired view from the pop-up menu.
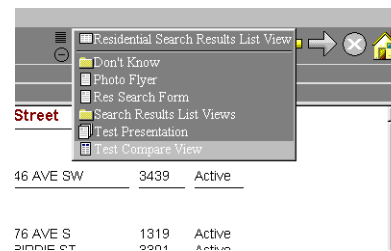
View modes

There are two different modes in which you can display a Kinnexus view: Draft Mode and Preview

Mode. Draft Mode fits as many properties or fields on the screen as is possible. The only constraints are the size of the screen and the zoom being used. Preview Mode is like Print Preview in Windows. It lets you preview what the view will look like when printed.

The mode is determined by the View Mode button on the toolbar. It is located left of the Current View Indicator.

To change the view mode:

1 Click the **View Mode** button. A pop-up menu displays containing Draft Mode and Preview Mode.

2 Select the desired mode from the pop-up menu.
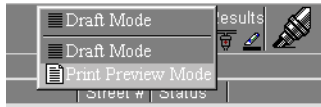
Printing views

You can print any Kinnexus view. Clicking File>Print or clicking the Print button bring up the Print dialog, where you can select a printer, page range, and number of copies.

Note: Kinnexus pages are very graphics intensive, and may take a while to print. The more graphics on a page, the longer it will take to print.

To print a View:

1 Open the view you want to print.

2 Click **File>Print** or click the **Print** button on the action bar. The Print dialog will appear.
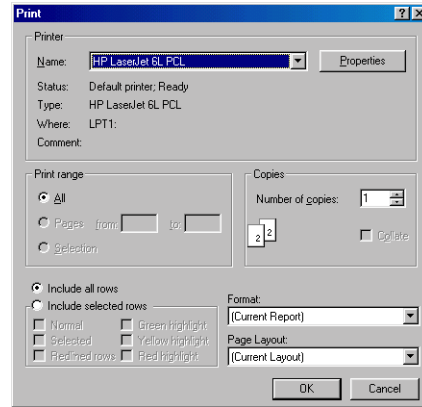
3 Select the desired printing settings.

4 Click **OK.**

Kinnexus print settings

While printer selection, page range and number of copies are standard print settings, the Kinnexus Print dialog contains some settings that are unique to Kinnexus. These settings are:

• Page Layout

• Highlighter Selection

• Format

Printing page layouts

When you are ready to print a document, you can simply open the Print dialog and click OK. The document will print with the current page layout. If you wish to change the current page layout before you

print, there is a Page Layout control on the Print dialog.

To select a page layout from the Print dialog:

1 Open the document you wish to print.

2 Click **File>Print** or click the **Print** button on the action bar. The Print dialog box appears. The name of the currently selected page layout displays in the Page Layout field.

3 If you wish to select a different page layout for the document you are printing, click the **Page Layout** drop-down arrow and select the desired page layout from the drop-down menu.

4 When you are ready to print, click the **OK** button. The selected page layout prints with document.

Print specific highlighter colors

You can use highlighters to select specific records for printing. For example, if you have a List View in which some rows are highlighted yellow, you can print just the rows highlighted in yellow.

To print specific highlighter colors:

1 Click the **File>Print** or click the **Print** button on the action bar. The Print dialog box appears.

2 Select the **Include Selected Rows** radio button. The highlighter checkboxes will enable.

3 Place a checkmark next to each highlighter color you want printed.
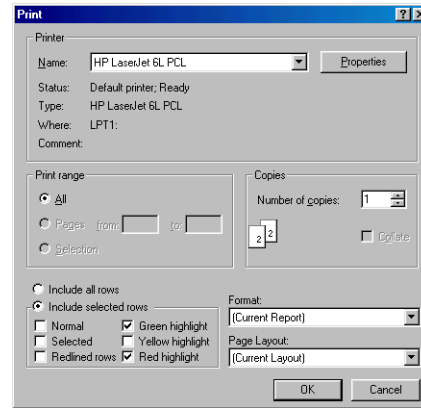
4 Click the **OK** button. The records highlighted in the colors you selected are sent to the printer.

Print format

From the Print dialog, you can choose a different printing format. For example, let's say you have the Print dialog open and a List View created by the system administrator in the main window. By changing the Format setting on the Print dialog, you can print the view in a Comparison View you have created, or in any other available format, even though you still have the system administrator's List View in the main window.

To change the Print format:

1 Click **File>Print**.

2 Click the **Format** drop-down menu. A list of available formats displays.

3 Select the desired format from the drop-down menu.

4 Click **OK.**

Emailing views

If your Kinnexus server is attached to the Internet, you can email any Kinnexus view as an attachment.

To email a view:

These instructions assume that a view is currently open.

1 Press the **Send** button on the Action Bar. The Mail Attachment Properties dialog appears.

2 Click the **Attachment Style** drop-down menu and select the desired attachment type. (for descriptions of the attachment types, see pageXX.)

3 If the view you are sending is a List View or Comparison View, and you want to send only certain listings in the view based on highlighter color, click the **Include Selected Rows** radio box. Place checkmarks next to each highlighter style you would like included in the attachment.

4 If desired, choose a different format into which to display the view by clicking the **Format** drop-down arrow and selecting the desired view.
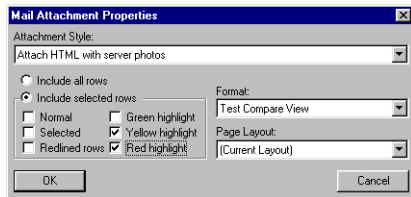
5 If desired, select a different page layout for the attachment by clicking the **Page Layout** drop-down arrow and selecting the desired page layout.

6 Click **OK**. A blank email message containing the current view as an attachment appears.

7 Complete the email message as if it were any other email message: Type an address, subject line and any message you want to send with the attachment.

8 When you are ready to send the message, click the **Send** button on the email message. Your message, including the attachment, will be sent to the addressee.

Export view data to a different format

Kinnexus lets you copy data from a view and place it in another format. For example, you can take data from a list view and place it directly into a Microsoft Excel spreadsheet without you having to retype a single line. You can also save your data in the native format of Top Producer, as an HTML document, or in plain ASCII text format. The process of placing Kinnexus data in an outside format is called exporting.

Common file export formats

The list below contains descriptions of common file export formats. Your system administrator can add other file export formats as they become available. If you are exporting to a 3rd-party format, (e.g., Top-Producer, Realty Tools, Online Agent, Real Edge) and you are not sure which export format to use, contact the 3rd-party vendor.

HTML Web browsers read HTML documents. Selecting this option copies the current view and associated data to a web page.

ASCII text ASCII text is a standard DOS text file. Selecting this option saves a copy the current view and associated data as a word processing document. This option is available only for List Views.

Microsoft Excel Spreadsheets Selecting this option imports the copied view data directly into a Microsoft Excel spreadsheet. This option is available only for List Views.

Top Producer Tag Format Selecting this option saves the view data in the native format of Top Producer. This option is available only for List Views.

Kinnexus Tag Format All Kinnexus servers can share data between servers. This format helps system administrators move data from one server to another. This option is available only for List Views.

Pictures This option saves all selected photos in a view to a specified directory. The native format is jpeg.

Exporting data

 The Export Format dialog box helps you get Kinnexus data into another program. You can view the Export Format dialog by clicking File>Export. The following directions show you how to export your data using the Export Format dialog.

To export Kinnexus data to an outside format:

To export data to an outside format, a view must be displayed in the main window.

1 Click **File>Export**. The Export Format dialog appears containing a list of the export formats available to you.
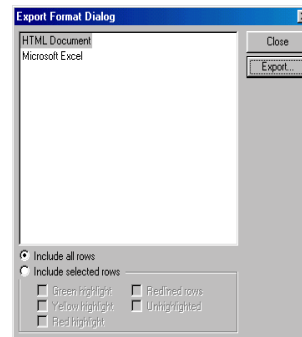
2 Select the desired export format.

3 Do one of the following:

4   If you wish to export all rows in the current view, select the Include **All Rows** radio button.

5   If you have highlighted rows in the current List View or form view and wish to export only highlighted rows, select the Include **Selected Rows** radio button. Once you click this radio button, several checkboxes below will enable. Click in the checkbox or checkboxes that describe the rows you wish to export.

6   When you have selected the information you wish to export, click the **Export** button. A Save As dialog opens.

Note: If you selected Microsoft Excel as your export format, the Save As dialog will not appear. Microsoft Excel will simply open a spreadsheet containing the exported information. You may then save the document using Microsoft Excel's save command.

7 Click the **Save in** drop -down arrow and select the location where you want the document saved.
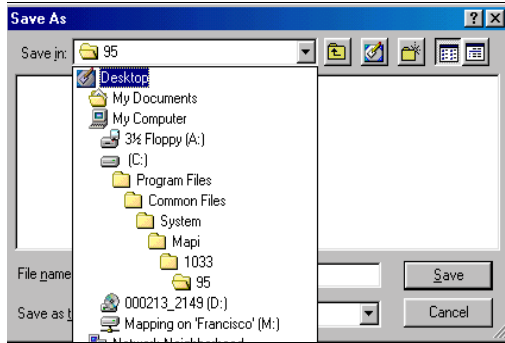
8 In the **File name** field of the Save As dialog, type a name for your document.

9 When you have selected a name and location, click the **Save** button on the Save As dialog box. The document containing the exported information saves to the location you specified. You can open the document and edit it as you wish.

List Views

List Views present data in columns and rows. Kinnexus gives you a great deal of control over the data in your List Views. Using Kinnexus functionality, you can:

• Change the appearance of data in List Views by changing the font settings and using highlighters

• Alter List View organization and functionality through grouping and applying mathematical functions

Creating a List View

To create a List View see *Creating a new view* on page XX.

Manipulating List View columns

In this section you will learn some advanced methods for manipulating columns in a List View. If you do not find the information you need in this section, check the *Column Manipulation* chapter in the A *Beginner's Guide to Kinnexus*. The instructions in this section assume you are looking at a List View.

Rename column headers

By default, the name of the field you dragged from the Field Chooser when adding the column is also the name of the column header. Once you have added the column, you can change the column header name to anything you want.

To rename a column header:

1 Right click the column header you would like to rename.

2 Select **Properties** from the right-click menu. The Column Settings dialog appears.

3 Click in the **Description** field. Delete the old column header name and type in the name you desire.
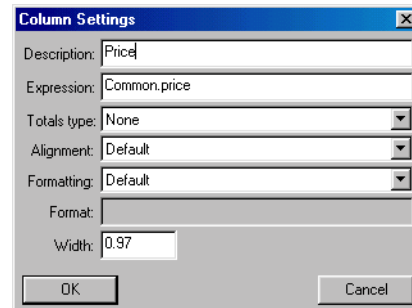
4 Click the **OK** button.

Change column alignment

The data in any List View column can be right justi-
fied, left justified, or centered.

To change column alignment:

1 Right-click in the column you would like to
realign and select **Column Settings** from the right-
click menu. The Column Settings dialog appears.

2 Click the **Alignment** drop-down box.

3 Select the desired alignment from the drop-
down menu.
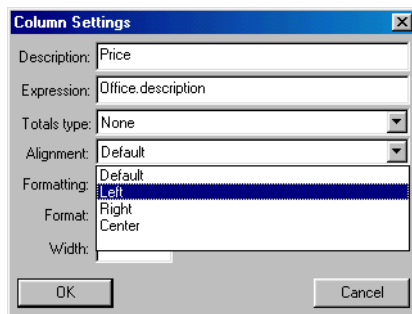
4 Click **OK**.

Column width

You can change the width of any column in a List
View.

To change column width:

1 Right-click on the column whose width you want
change.

2 Select **Column Settings** from the right-click
menu.

3 Click in the **Width** field and type in the desired
width for the column. Width is measured in inches.

4 Click the **OK** button.

Changing List View appearance

You can control the font, font size, and font color of
data in List Views. You can also set spaces between
lines and determine which data you want to display
or hide.

List View fonts

There are two kinds of text in a List View: row text
and totals text. Row text is the actual information in
the columns. Totals text appears at the top and bot-
tom of the columns and gives you totals information
about all the records in a column. Mathematical
functions, such as average and sum, are considered
totals text. Although you change font settings for
row text and totals text separately, you will use the
Font Format dialog in both instances. The only dif-
ference between setting row fonts and totals fonts is
how you get to the Font Format dialog.

To open the Row Font Format dialog:

1 Right-click the List View and select **List View
Properties** from the right-click menu. The List View
Properties dialog appears.

2 Click the **Row Font** button. The Font Format
dialog appears. If you are unfamiliar with Font For-
mat dialog controls, see chapter XX.

To open the Totals Font Format dialog:

1 Right click the List View and select **List View
Properties** from the right-click menu. The List View
Properties dialog will appear.

2 Click the **Totals Font** button. The Font Format dialog appears. If you are unfamiliar with Font Format dialog controls, see chapter XX.

Display/Hide List View data

Kinnexus lets you choose whether to display or hide List View information. By default, both row text and totals text are always displayed. However, when presenting data in List Views, you may want to display only row text information, or only totals information. The following sets of instructions will show you how to display and hide List View data.

To display/hide rows

1 Right-click the List View and select **List View properties** from the right-click menu.

2 Locate the **Display Rows** checkbox. If there is a checkmark in the checkbox, it means that row text is currently displayed. To hide row text, remove the checkmark by clicking the box. Simply click again in the box to replace the checkmark and display the row text again.

3 Click **OK**.

To display/hide totals

1 Right-click the List View.

2 Select **List View Properties** from the right-click menu.

3 Locate the **Include grand totals** checkbox. If there is a checkmark in the checkbox, it means that totals text is currently displayed. To hide totals text, remove the checkmark by clicking the box. Simply

click again in the box to replace the checkmark and display the totals again.

4 Click **OK**.

Gridline spacing and back fill color

Gridline spacing and alternating backfill color make viewing and reading List Views less confusing. Gridline spacing places a line between each List View row, making each row easier to identify and read. Alternating back fill color allows you to apply a color to every other row in the List View. Alternating back fill color has the same visual purpose as the gridline spacing - it visually delineates each row, lessening the likelihood that you will confuse data from one row with another.

To apply gridline spacing:

1 Right-click the List View.

2 Select **List View Properties** from the right-click menu.

3 Select the **Gridline Row Spacing** checkbox.

4 Click in the **Gridline Spacing** field and type the amount of space you want between each gridline. Gridline spacing is measured in inches.
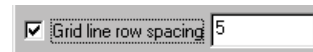
5 Click **OK**.

To apply alternating back fill color:

1 Right-click the List View.

2 Select **List View Properties** from the right-click menu.

3 Select the **Alternating Back Fill Color** checkbox.
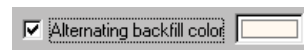
4 If you want to change the back fill color, use the color control to the right of the checkbox.

5 Click the **OK** button.

Using highlighters in List Views

Highlighters let you create visual separations and allow you to hide or show specific properties. There are five different highlighter styles that you can choose from: red, yellow, green, black (normal), and strike-out.

Highlight rows

In order to highlight a row, the row must be selected. There are three ways to select columns:

• Single row: Click a row to select it. This method selects only a single row. If any other rows were previously selected, they will be deselected

• Multiple rows: Click each row you want to select while holding down the **CTRL** key.

• Range: Click the first item in the desired range. Hold down the **SHIFT** key and click the last item in the desired range. All listings in the range are selected.

To highlight rows:

1 In the List View, select the row(s) you would like to highlight.

2 Click the **Highlighters** button on the Action Bar.

3 Click the desired highlighter color from the drop-down menu.

Un-highlight rows

You can remove highlighting from any row or group of rows.

To un-highlight rows:

1 Select the rows you want to un-highlight.

2 Click the **Highlighters** button. A drop-down menu appears that allows you to select a marker color.

3 Click the black marker.

Hide highlighted rows

You can hide any highlighted List View rows based on their highlight color.

To hide highlighted rows:

1 Click the **Highlight Filters** button on the Action Bar.

2 In the Marker Selection dialog, click in the checkbox next to the highlighter color you want to hide. The checkmark in the check box will be removed.
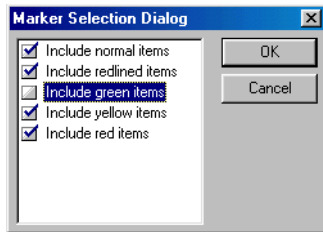
3 Click **OK**. To make the rows visible again, simply replace the checkmark in the appropriate Marker Selection dialog checkbox.

Grouping List Views

Grouping is an advanced way of organizing List Views. Kinnexus groups all items with similar values together under a common heading. For example, grouping by status visually divides listings by status, so that all of the active listings appear together, all the sold listings appear together, etc. This section will show you how to add, remove, reorder, and hide groups.

Grouping Bar

In order to manage groups, the Grouping Bar must be enabled. All the instructions in this section assume the Grouping Bar is enabled.

To enable the Grouping Bar:

1 Click **View>Grouping Bar**. The Grouping Bar appears directly above the column headers.

Adding a group

Adding a group to a List View is very similar to adding a column—you simply drag a field from the Field Chooser to the Grouping Bar on the List View. You can add up to four grouping fields. Groups on the Grouping Bar are sorted left to right.

To add a group from the Field Chooser:

1 Find the desired field in the Field Chooser and click it.

2 Without releasing the mouse button, drag the field to the Grouping Bar above the column headers.

3 Release the mouse button.

4 If desired, repeat steps 1-3 to add more grouping fields.

If a field you want to group by is already a column in the List View, simply drag the column header to the Grouping Bar. Hold down the CTRL key while dragging the column to the Grouping Bar if you want the column to be both a grouping field and a column.

Re-ordering groups

If you have more than one grouping field in the Grouping Bar, you can change the order of grouping fields just like you would change the order of column headers.

To reorder grouping fields:

1 On the Grouping By bar, click the field you want to move and drag it to the desired position on the bar. Grouping fields are sorted left to right.

Removing groups

You can remove any group field from the Grouping Bar.

To remove a grouping field:

1 Click the unwanted field name in the Grouping Bar and drag it to a location about an inch below the column headers.

2 Release the mouse button. The group disappears.

Group header/footer font settings

Changing the group header or footer text is very similar to changing the text of the List View rows. Header text is the common heading title that appears above a list of grouped listings. Footers text appears at the bottom of each grouped list.

To change group header/footer font settings:

1 Right click a group header.

2 Select **Group Properties** from the right-click menu.

3 Click the Header **Font** button or the Footer **Font** button.

4 Select the font, font size, font color, and any special effects you want to apply to the header or footer text.

5 Click the **OK** button on the Font Format Dialog box and the List View Properties Dialog box.

Changing group header/footer spacing

Kinnexus allows you to add extra space above or below a header or footer. Space above is called leading space; space below is called trailing space. Adding extra space makes the List View more readable by visually dividing the list into groups.

The grouping itself provides some visual division, but adding some extra space before each group creates an even better effect.

To change group header/footer spacing:

1 Right-click a common heading in the List View.

2 Select **Group Properties** from the right-click menu.

3 Click in the **Header or Footer Leading Space** and **Trailing Space** fields and type the desired measurements. Leading and Trailing space is measured in inches.

4 Click **OK**.

Hide common heading rows

You can hide all the rows under a common heading in a grouped List View while leaving the summary information displayed.

To hide common heading rows:

For these instructions you should be looking at a List View that has at least one group.

1 Double-click the common heading name of the rows you would like to hide. The rows under the heading disappear.

2 To bring the rows back, double-click the group title again.

Hide all rows

If you are creating a statistical Report, you can quickly hide all of the detail rows in the entire List View and leave only the group headers and footers displayed.

To hide all rows:

For these instructions you should be looking at a List View that has at least one group.

1 Right-click the List View.

2 Select **List View Properties** from the right-click menu. The List View Properties Dialog box appears.

3 Remove the check mark next to **Display Rows** by clicking on the check mark.
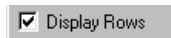
4 Click the **OK** button. All rows in the List View are hidden, but group titles remain visible.

List View mathematical functions

Using the mathematical functions available in Kinnexus, you can create custom statistical reports. You can apply a mathematical function to any column in a List View. There are five functions available: Sum, Count, Average, Sum Percent, Count Percent. Although you can apply mathematical functions to any column, most functions are helpful only when applied to number fields..

Function	Icon	What it does
Sum		Adds all values in a column. If the List View is grouped, the sum of each common heading appears beneath the common heading list. The grand total appears at the bottom of the List View.
Average		Finds the average value for a column. If the List View is grouped, the average of each common heading appears beneath the common heading list, and the overall average appears at the bottom of the List View.
Count		Counts how many entries there are in a column. If the List View is grouped, the number of items under each common heading is displayed at the bottom of the common heading list. The overall count of List View items appears at the bottom of the List View.
Percent		Determines the percent of the sum of the items under each common heading in relation to the sum of the entire column. Most useful when grouping is used.
Count Percent		Determines the percent of the number of items under each common heading in relation to the entire record count. Most useful when grouping in used.

To select a mathematical function:

These instructions assume you are looking at a List View.

1   Right-click the column header you want to apply a mathematical function to.

2   Select **Properties** from the right-click menu. The Column Properties box appears.

3   Click the **Totals Type** drop-down menu and select the desired mathematical function.
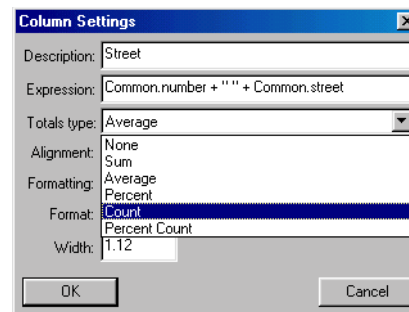
4   Click the **OK** button. A mathematical function symbol appears in the column header after selecting a mathematical function. Clicking the mathematical function symbol in the column header rotates through the functions.

Comparison Views

Comparison Views combine the functionality of a List View with the presentability of a Report. Comparison Views resemble List Views in that they let you select, edit and group information, and resemble Reports in that they are attractively laid out for distribution to potential buyers. Items in a Comparison View are displayed in rows horizontally, rather than vertically in columns. Despite this difference in orientation, Comparison Views function in much the same way as List Views. Using Kinnexus function-

ality, you can manage the data in Comparison Views by manipulating rows, changing the view appearance, using highlighters, and creating expressions.

Manipulating Comparison View rows

In this section you will learn some methods for manipulating rows in a Comparison View. The instructions in this section assume you are looking at a Comparison View.

Add rows

To add a column to a Comparison View, the Field Chooser must be visible.

To add a row:

These instructions assume a Comparison View is currently open.

1   In the Field Chooser, find the field you would like to add.

2   Click the desired field without releasing the mouse button.

3   Drag the cursor to the place among the row headers where you want the row to appear.

4   Release the mouse button when a red line appears.

Add a photo row

Adding a photo row is just like adding any other field. Photo fields are found in the Other table in the Field Chooser

To add a row:

These instructions assume a Comparison View is currently open.

1   Expand the **Other** table in the Field Chooser.

2   Find the photo field you would like to add.

3   Click the desired field without releasing the mouse button.

4   Drag the cursor to the place among the row headers where you want the photo row to appear.

5   Release the mouse button when a red line appears.

Remove a row

You can remove any row in a Comparison View.

To remove a row

1   Click the row header of the row you wish to remove without releasing the mouse button.

2   Drag the cursor into the Comparison View window and release the mouse button.

Reorder rows

You can reorder any of the rows in a Comparison View.

To reorder rows:

These instructions assume a Comparison View is currently open.

1   Click the row header of the row you wish to reorder without releasing the mouse button.

2   Drag the cursor to the place you would like the row to appear.

3   When a red line appears, release the mouse button.

Resize rows

You can resize a row horizontally or vertically. However, if you adjust one row horizontally, all rows in the Comparison View will be resized.

To resize a row:

These instructions assume a Comparison View is currently open.

1 Place your mouse pointer over any edge of the row header you want to resize. Notice that the mouse pointer changes from a white arrow to a black double-pointed arrow.

2 When you see the double-pointed arrow, hold down the left mouse button and drag the mouse. Depending on where you move your mouse, the row header will become larger or smaller.
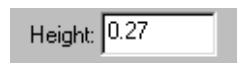
Change column height

You can adjust the height of any Comparison View row.

To change column alignment:

These instructions assume a Comparison View is currently open.

1 Right-click the row whose height you want to change.

2 Select **Row Properties** from the right-click menu.

3 Click in the **Height** field and type the desired row height. Row height is measured in inches.

Height: 0.27

4 Click OK.

Rename row headers

By default, the name of the field you dragged from the Field Chooser when adding the row is also the name of the row header. Once you have added the row, you can change the row header name to anything you want.

To rename a row header:

These instructions assume a Comparison View is currently open.

1 Right-click the column header you would like to rename.

2 Select **Row Properties** from the right-click menu. The Comparison View Row Settings dialog appears.

3 Click in the **Description** field. Delete the old row header name and type in the name you desire.

Description: Main Photo

4 Click **OK**.

Change vertical row alignment

You can vertically align row data at the top, center, or bottom of the row.

To change vertical row alignment:

These instructions assume a Comparison View is currently open.

1 Right-click the row you would like to realign.

2 Select **Row Properties** from the right-click menu.

3 Click the **Vertical** drop-down arrow.
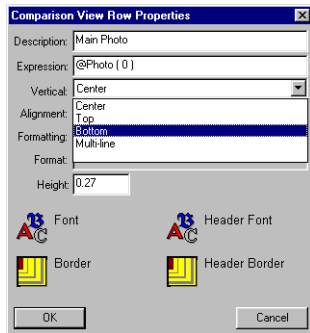
4 Select the desired alignment from the drop-down menu.

5 Click **OK**.

Change horizontal row alignment

The data in any Comparison View row can be right justified, left justified, or centered.

To change horizontal row alignment:

These instructions assume a Comparison View is currently open.

1 Right-click the row you would like to realign.

2 Select **Row Properties** from the right-click menu. The Comparison View Row Settings dialog appears.

3 Click the **Alignment** drop-down arrow.

4 Select the desired alignment from the drop-down menu.
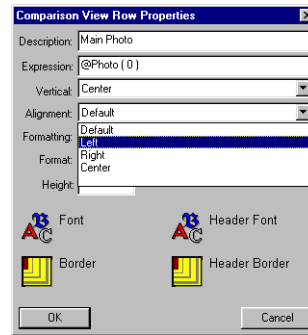
5 Click **OK**.

Changing Comparison View appearance

You can control the font, font size, font color, and style effects of data in Comparison Views. You can also set spaces between lines and determine which data you want to display or hide.

Comparison View fonts

There are two kinds of text in a Comparison View: Row text and Header text. Row text is the actual information in the columns. Header text consists of the row names that appear to the left of the Comparison View. Although you change font settings for row text and header text separately, you will use the Font Format dialog in both instances. The only difference between setting row fonts and header fonts is how you get to the Font Format dialog.

There are two places you can set Comparison View font settings. In the Properties dialog, you can set

default fonts for the entire Comparison View. In the Row properties dialog, you can change the font settings for individual rows.

To open the Row Font Format dialog:

These instructions assume a Comparison View is currently open.

1   Do one of the following:

• To change the font of just one row in the Comparison View, right-click the row whose font you want to change and select Row Properties from the right-click menu.

• To change the font of all the rows in the Comparison View, right-click anywhere in the Comparison View and select Properties from the right-click menu.

2   If you are changing the font of just one row, click the **Row Font** button. If you are changing the font of each row, click the **Default Font** button. The Font Format dialog appears. If you are unfamiliar with Font Format dialog controls, see chapter XX.

To open the Header Font Format dialog:

These instructions assume a Comparison View is currently open.

1   Do one of the following:

• To change the font of just one header in the Comparison View, right-click the header whose font you want to change and select Row Properties from the right-click menu.

• To change the font of all the headers in the Comparison View, right-click anywhere in the Comparison View and select Properties from the right-click menu.

2   If you are changing the font of just one header, click the **Header** button. If you are changing the font of all the headers in the Comparison View, click the **Default Header** button. The Font Format dialog appears. If you are unfamiliar with Font Format dialog controls, see chapter XX.

3   Click OK.

Alternating backfill color

Alternating backfill color makes viewing and reading Comparison Views less confusing by allowing you to apply a color to every other row in the Comparison View. Alternating backfill color visually delineates each row, lessening the likelihood that you will confuse data from one row with another.

To apply alternating back fill color:

These instructions assume a Comparison View is currently open.

1   Right-click the Comparison View.

2   Select **Properties** from the right-click menu.

3   Select the **Alternate Backfill Color** checkbox.

4   If you want to change the backfill color, use the color control to the right of the checkbox.

5   Click **OK**.

Page break with each line

Comparison Views consist of horizontal rows of reports. It is possible, using the Page Break With Each Line checkbox, to print only one row of reports per page.

To set a page break with each line:

1   Right-click the Comparison View.

2   Select **Properties** from the right-click menu.

3   Place a checkmark in the **Page Break With Each Line** checkbox by clicking it.

4   **Click OK.**

Report width

You can adjust the width of the reports contained in each Comparison View row. You can make the reports wider for emphasis, or you can make them narrower so more reports fit on the page.

To adjust Report width:

These instructions assume a Comparison View is currently open.

1   Right-click the Comparison View.

2   Select **Properties** from the right-click menu.

3   Enter the desired Report width in the **Report Width** field. Report width is measured in inches.

Spacing between reports

You can adjust the space between Report rows.

To adjust spacing between Report rows:

These instructions assume a Comparison View is currently open.

1   Right-click the Comparison View.

2   Select **Properties** from the right-click menu.

3   Enter the desired space in the **Spacing Between Reports** field. Space between reports is measured in inches.

4   Click OK.

Borders

You can place borders around row headers and data rows. The only thing difference between adding borders to row headers and data rows is how you get to the Borders dialog.

To open the Header Borders dialog:

These instructions assume a Comparison View is currently open.

1   Do one of the following:

•   To set a border for just one header in the Comparison View, right-click the header for which you want to set a border and select **Row properties** from the right-click menu.

•   To set a border for all the headers in the Comparison View, right-click anywhere in the Comparison View and select **Properties** from the right-click menu.

2   If you are setting a border for just one header, click the **Header Border** button. If you are setting a border for all the headers in the Comparison View, click the **Default Header Border** button. The Bor-

ders dialog appears. If you are unfamiliar with Borders dialog controls, see chapter XX.

To open the data row Borders dialog:

These instructions assume a Comparison View is currently open.

1 Do one of the following:

• To set a border for just one data row in the Comparison View, right-click the row to which you want to add a border and select **Row Properties** from the right-click menu.

• To set a border for all the data rows in the Comparison View, right-click anywhere in the Comparison View and select **Properties** from the right-click menu.

2 If you are setting a border for just one header, click the **Header** button. If you are setting a border for all the headers in the Comparison View, click the **Default Header** button. The Borders dialog appears. If you are unfamiliar with Borders dialog controls, see chapter XX.

Using highlighters in Comparison Views

Highlighters let you create visual separations and allow you to hide or show specific reports in a Comparison View. There are five different highlighter styles that you can choose from: red, yellow, green, black (normal), and strike-out.

Selecting Comparison View records

In order to highlight a Report, the Report must be selected. There are three ways to select reports:

• Single Report - Click a record to select it. This method selects only a single record. If any other records were previously selected, they will be deselected

• Multiple Report -Click each Report you want to select while holding down the CTRL key. Click again on a Report to deselect it.

• Range - Click the first record in the desired range. Hold down the **SHIFT** key and click the last record in the desired range. All records in the range become selected.

Highlight records

To highlight records:

These instructions assume a Comparison View is currently open.

1 In the Comparison View, select the record or reports you would like to highlight.
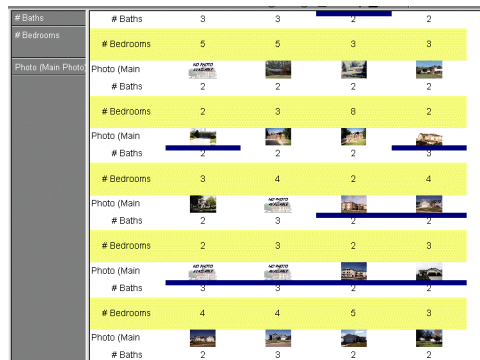
2 Click the **Highlighters** button on the toolbar.

3 Click the desired highlighter color from the drop-down menu.
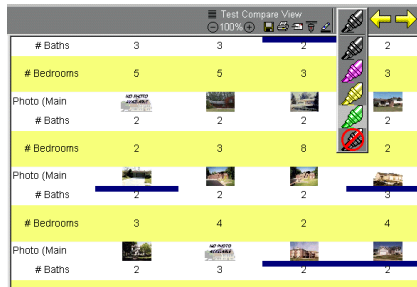
Un-highlight records

You can remove highlighting from any record or group of records.

To un-highlight reports:

These instructions assume a Comparison View is currently open.

1 Select the record or records you want to un-high-light.

2 Click on the **Highlighters** button. A drop-down menu appears that allows you to select a marker color.

3 Click the black marker style.

Hide Highlighted records

You can hide any highlighted records based on their highlight color.

To hide highlighted records:

These instructions assume a Comparison View is currently open.

1 Click the **Set Highlight Filter** button.

2 Click in the checkbox next to the highlighter color you want to hide. The checkmark in the check box disappears.
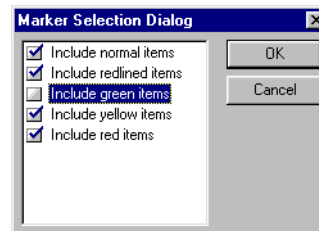
3 Click the **OK** button. To make the records visible again, simply replace the checkmark in the appropriate Marker Selection checkbox.

4 Click **OK**.

Reports

Reports allow you to present property information to potential buyers in attractive and useful ways. Using the Kinnexus Report Editor, you can create custom flyers, data information sheets, and other reports for your customers. The Report Editor also allows you to modify existing reports, granted you have adequate security access. Kinnexus gives you compete control over the size, layout, and content of your reports.

This chapter will show you how to:

• Create a new Report resource and modify an existing Report

• Add, remove, and size Report pages

• Manipulate Report frames

• Add text, map, and graphics fields to the Report

• Add borders around reports, pages, frames, and paragraphs

Creating a new Report resource

The first step in designing your own custom Report is creating the Report resource. Once the resource is created, you can add pages, frames, text, maps, and graphics to the Report. For instructions on how to create a new Report resource see *Creating a new view* on page XX.

Modifying an existing Report

You can modify a Report that has already been created using the Report Editor. Modifying an existing Report can save you a lot of time. For example, perhaps you like the layout of an existing Report, but it doesn't contain all the fields you need. If you have adequate security rights, you can add fields to the existing Report, while maintaining the same basic layout. Your security rights will appear between brackets to the right of each Report in the Presentation Portfolio. See *Sharing Resources* on page XX for an explanation of the different security levels.

To modify an existing Report:

1   Click the **Tools** tray tab.

2   Click the **View Portfolio** icon. The View Portfolio will open.

3   Find the Report you want to modify in the View Portfolio window and double-click it. The selected Report opens.

4   Make the desired changes to the Report.

5   When you are through modifying the Report, click the **Save** button on the toolbar.

•   If you have Write Access to the Report you are modifying, your changes will be saved.

•   If you have Copy Access to the Report you are modifying, you will be prompted to save the Report under a different name.

Report toolbar

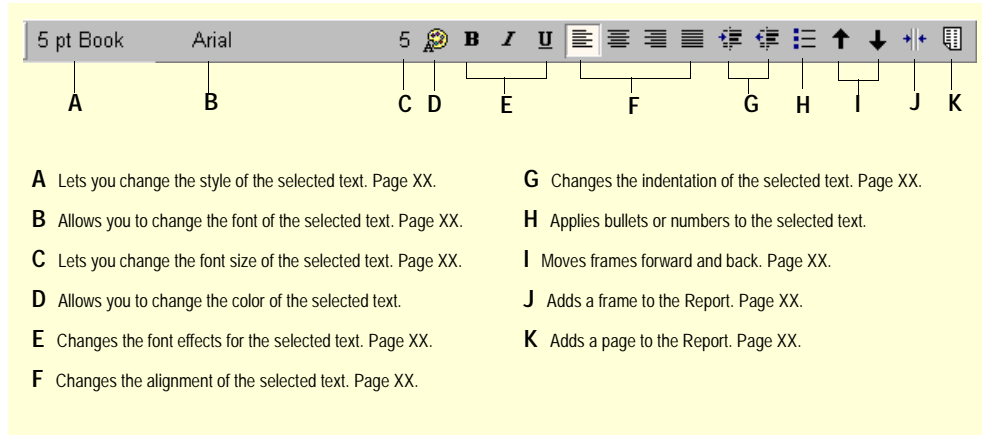Reports in the View Portfolio have a unique tool bar. The Reports toolbar contains commands for designing and formatting reports. The following illustra-

tion tells you what each button on the Report toolbar does. See the page number referred to in the illustration for instructions on how to use each command.

REPORT TOOLBAR

A Lets you change the style of the selected text. Page XX.

B Allows you to change the font of the selected text. Page XX.

C Lets you change the font size of the selected text. Page XX.

D Allows you to change the color of the selected text.

E Changes the font effects for the selected text. Page XX.

F Changes the alignment of the selected text. Page XX.

G Changes the indentation of the selected text. Page XX.

H Applies bullets or numbers to the selected text.

I Moves frames forward and back. Page XX.

J Adds a frame to the Report. Page XX.

K Adds a page to the Report. Page XX.

Report pages

You can adjust Report pages to best meet your needs. You can add and remove Report pages, adjust the page size, and add a page border.

Adding pages

By default, reports have only one page when they are created. When you have more information than can fit on one page, you can add one or more additional pages to your Report until you have sufficient room for your data presentation.

To add a page:

These instructions assume that the Report you want to add a page to is open.

1 Click the **Add Page** icon on the tool bar. A new page will be added to the end of the Report.

Removing pages

You can delete any page from a Report except the first page.

To remove a page:

These instructions assume that the Report you want to remove a page from is open.

1 Right-click the page you want to delete and select **Delete Page** from the right-click menu.

Sizing pages

You can easily resize Report pages to make them bigger or smaller. The only limitation in resizing a page is that Kinnexus cannot create pages of different sizes within the same Report. If you resize one Report page, all of the pages in the Report will resize to the same dimensions.

To resize a page:

These instructions assume that you are currently looking at the page you want to size.

1 Right-click the page and select **Report Properties** from the right-click menu. The Report Properties dialog appears.

2 Type the desired page dimensions in the **Width** and **Height** fields.
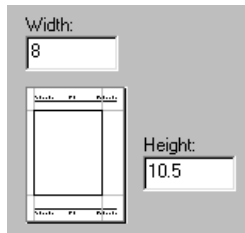
3 Click **OK**.

Report frames

Frames are a graphical way of arranging text, photos, and maps on a form. Before you can add any information to a Report, you must create a frame to contain it. Frames make it easier to edit your forms because the frames are not dependent on one another. This means that you can edit one frame without affecting the other frames on the Report.

Adding frames

The Add Frame button on the toolbar makes it very easy to add frames to a Report page. You can add as many frames to a page as you want.

To add a frame:

These instructions assume that the Report page you want to add a frame to is open..

1 Click the **Add Frame** button on the tool bar. A new frame appears in the top left corner of the form.

Moving Frames

Once you have added a frame, you can move it to a different location on the same page. You cannot, however, drag a frame to a different page.

To move a frame:

These instructions assume that the Report page containing the frame you want to move is open.

1 While holding down the **CTRL** key, click the frame you want to move and drag it to the desired location on the page.

2 When the frame is in the desired location, release the CTRL key and the left mouse button.
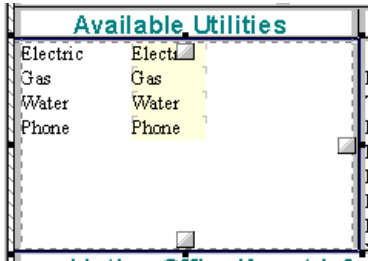
Sizing frames

If you don't like the default frame size, you can resize a frame to any rectangular shape that fits within the Report page boundaries.
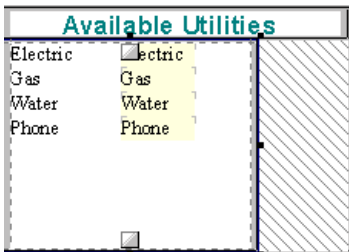
To size a frame:

These instructions assume that the Report page containing the frame you want to size is open.

1   Click the frame you want to size. Six or eight dots appear around the perimeter of the frame. The dots are used to size the frame.

2   Place your mouse over one of the dots. A sizing arrow appears.

3   When you see the double pointed sizing arrow, click and drag the frame to the desired size.

4   Release the mouse button.

Joining frames

Adjacent frames can be joined. When you resize a frame that has been joined to another, both frames adjust in size, so that the two frames don't overlap.
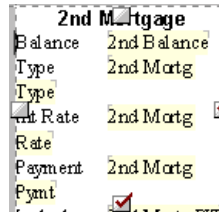
To join frames:

These instructions assume that the Report page containing the frame you want to join is open.

1   Click in a frame. If there are adjacent frames, joining boxes appear.
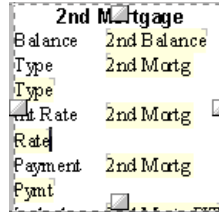
2   Click in the joining box. A check mark appears. Placing a check mark in the box designates that the frame is "joined" with the adjacent frame.

Frame margins

Each frame has internal margins dictating how close text can come to the inside edge of the frame.

To adjust frame margins:

These instructions assume that the Report page containing the frame whose margins you want to adjust is open.

1   Right-click the frame whose margins you want to change and select **Frame Properties** from the pop-up menu. The Frame Format Dialog box appears.

2 Enter the desired margins in the **Frame Margins** fields. Margins are measured in inches.
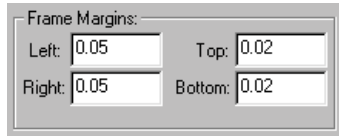
3 Click **OK**.

Moving frames forward/backward

Kinnexus allows frames to overlap. Overlapping frames have advantages and disadvantages. Overlapping frames are convenient, because you can have superimposed text, like a watermark. On the downside, Kinnexus can't create overlapping frames in HTML. This means you will receive unpredictable results if you attach a form with overlapping frames to an email message.

Overlapping frames are assigned an order so that Kinnexus knows which frame is on top. You can bring a frame forward or push it back using the arrows on the format toolbar. The up arrow moves the frame to the front, while the down arrow pushes the frame back.

To move frames forward/backward:

These instructions assume that the Report page containing the frame you want to move forward or backward is open.

1   Click the frame you want to move forward or backward. The sizing dots appear around the frame.

2   Do one of the following:

• To move the frame forward, click the up arrow on the format bar.

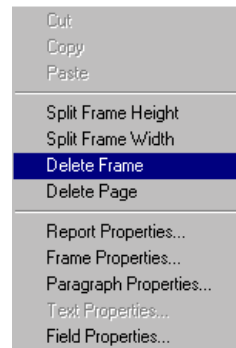• To move the frame backward, click the down arrow on the format bar.

Removing frames

You can easily remove a frame from a Report.

To remove a frame:

These instructions assume that the Report page containing the frame you want to remove is open.

1   Right-click the frame you wish to remove. The right-click menu displays.

2 Select **Delete Frame** from the right-click menu.

Report fields

Once you have added a frame or frames, you can add actual property information fields to your custom Report. You simply add the fields from the Field Chooser that describe the property information you want on your Report.

You can add text, photos, maps, graphs, and graphics fields to frames on a Report page. You can add several text fields to the same frame, but photo, map, graphs, and graphics fields must have their own frame.

To add a text field to a frame:

These instructions assume that the Report you want to add a text field to is open.

1   Find the desired text field in the Field Chooser and click it without releasing the left mouse button.

2   Drag the selected field from the Field Chooser into the desired frame and release the left mouse button.

Note: Make sure a small white box containing a plus sign appears just below the cursor before you release the left mouse button. Otherwise, the field will not be added to the frame.

To add a map*, photo, graphics, or graph field to a frame:

*You can add only one map per Report.

1   Create a frame for the field if you have not already done so. Remember, map, photo, graphics, and graph fields must have their own frame.

2   Find the desired map, photo, graphic, or graph field in the Field Chooser and click it without releasing the left mouse button.

3   Drag the selected field from the Field Chooser into the frame and release the left mouse button.

Note: Make sure a small white box containing a plus sign appears just below the cursor before you release the left mouse button. Otherwise, the field will not be added to the frame.

To remove a field from a frame:

1   Click the right end of the field you want to remove.

2   Press the **BACKSPACE** key until the field has been deleted.

default format. All Report fields that contain text have the same Field Properties dialog.

To open the Field Properties dialog:

These instructions assume that the Report containing the text field you want to edit is open.

1   Right-click the text field you want to edit.

2   Select Field Properties from the right-click menu.

Report text field properties

In the Field Properties dialog, you can apply default settings to the text fields on a Report. For example, you can set a default relevancy value, or specify a

FIELD PROPERTIES DIALOG

A If you want to change the name of the field, click in the Description field and type the new name.

B If desired, click in the Expression field and type a new expression.

C If desired, click the Formatting drop-down arrow and select a different default format.

D If you want to change the default relevancy value, click the Relevancy drop-down arrow and select the desired value.

E If you want to require that data be entered into the field, select the Required Entry checkbox.

F If you want to make the contents of the field uneditable, select the Read Only checkbox.

G Additional constraints.

Report field map properties

In the Report Field Map Properties dialog, you can apply default settings to a map field on a Report. For example, you can select a default rotation and zoom, specify the starting location of the map, and choose a default feature demographic.

To open the Report Field Map Properties dialog:

These instructions assume that the Report containing the map field you want to edit it is open.

3 Right-click the map field.

4 Select Field Properties from the right-click menu.

REPORT FIELD MAP PROPERTIES DIALOG

A Select a demographic feature form the Feature drop-down menu.

B Select the Force Fixed Location checkbox and enter the address you want the map to automatically center on. You can use a complete address, or a city or zip code.

C Click the Label Type drop down menu and select the desired label type. See page XX for detailed description of each label type.

D Label expression

E Click the Legend Type drop-down menu and select a location for the map legend.

F Select a default map rotation from the Rotation drop-down menu.

H Select a default map zoom from the Zoom drop-down menu.

I Click the Font button to set font properties for the map legend.

Report picture (photos and graphics) properties

The Report photo and graphics settings are set in the Picture Field Properties dialog. Picture Field Properties dialog let you assign an image to a field, name the field, and assign it a maximum height
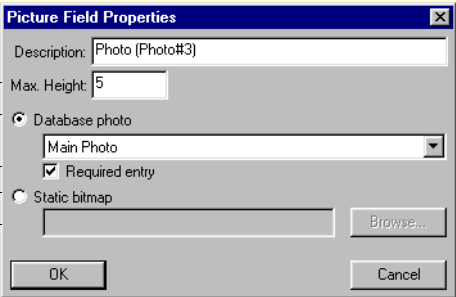
To open the Picture Field Properties dialog:

These instructions assume that the Report containing the picture field you want to edit is open.

5 Right-click the picture field whose properties you want to edit.

6 Select Field Properties from the right-click menu.

.

PICTURE FIELD PROPERTIES DIALOG

A Click in the Description field and enter a new name for the photo or graphic.

B Click in the Max. Height and type a value representing how high the photo or graphic can be. Max. Height is measured in inches.

C If the field you are editing is a photo, click the Database photo radio button. Click the Database photo button drop-down arrow and select the desired photo

format. If you want to require that a photo is entered into the field every time the Report is used, select the Required Entry checkbox.

D If the field whose properties you are editing is a graphic, select the Static bitmap radio button. Click the Browse button to select the desired graphic.

Report font settings

There are two ways to change font settings when creating a Report. You can change font settings using the Font Format dialog, or you can use the formatting toolbar. The toolbar contains the same controls as the Font Format dialog, but is generally easier to use

To open the Font Format dialog:

1   Select the text whose font you want to change.

2   Right-click on the screen and select Text Properties from the right-click menu. The Font Format dialog appears. If you are unfamiliar with Font Format dialog controls, see chapter XX.

To use the Font settings toolbar:

1   Select the text whose font settings you want to change.

2   Click the appropriate button on the toolbar and select the desired setting from the drop-down menu. For example, if you want to change the font size button, click the **Size** button and select a size from the drop-down menu.

Report paragraph settings

Paragraph settings in Kinnexus allow you to justify text, set tabs and indents, place information in numbered and bulleted lists, and place borders around paragraphs.

Align text

The justification controls in Kinnexus allow you to choose how you want to align the text in your reports. You can align text using the justification buttons on the Report toolbar.

Button	Alignment	What it does
	Left	Pushes the text flush against the left border of the frame.
	Right	Pushes the text flush against the right border of the frame.
	Center	Centers text within the frame
	Full	Inserts spaces into a line so the text is flush against both the left and right text margins.

Alignment options

To align text:

These instructions assume that the Report whose paragraph settings you want to modify is open.

1   Highlight the text you wish to justify.

2   Click the desired justification button on the Report toolbar. The text will align according to the justification you specified.

Tab stops

You can use tab stops to align paragraphs at specific places. Tabs are especially helpful when you are presenting information in columns because you can use the tabs to quickly and accurately align the text in each column.

To set a tab you define a tab stop and then apply the tab in the document by pressing the TAB key on the keyboard.

Defining tab stops

If you want to use the same tab stop throughout the paragraph(s), you can define a default tab value. Here is an illustration of what paragraphs with a default tab stop look like:

If you wish to use different tab stops within the same paragraph(s), you can define custom tab stops. Here is what paragraphs with custom tab stops look like:

You can choose from five kinds of tab stops: Left, Right, Center, Decimal and Indenting. You can also select a tray tab leader to fill the space between a tray tab and the character following it.

Default tabs can be set in the Tab dialog. Custom tabs can be set in the Tab dialog or by using the horizontal ruler at the top of the Report.

To set a default tab:

These instructions assume that the Report whose paragraph settings you want to modify is open.

1 Select the paragraph(s) to which you want to assign a default tab.

2 Right click the Report and select **Paragraph Properties** from the pop-up menu. The Paragraph Format dialog appears.

3 Click the **Tabs** button. The Tabs dialog appears.

4 If not already selected, click the **Default tab stop:** radio button.

5 Click in the **Default tab stop** field and type the desired tab. Tabs are measured in inches.
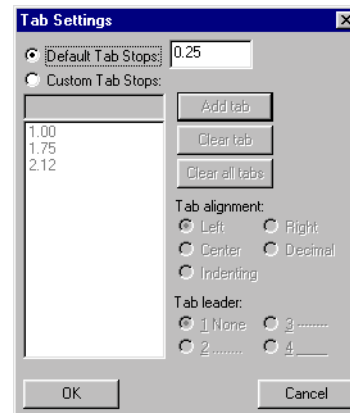
6 Click **OK**.

To set custom tabs in the Tab dialog:

These instructions assume that the Report whose paragraph settings you want to modify is open.

1 Select the paragraphs you want to assign a tab to.

2 Right click the Report and select **Paragraph Properties** from the pop-up menu. The Paragraph Format dialog appears.

3 Click the **Tabs** button. The Tabs dialog appears.

4 If not already selected, click the **Custom tab stops:** radio button.

5 Click in the **Custom tab stops** field and type the desired tab. This will be the first tab in the paragraph. Tabs are measured in inches.

6 Click the **Add tab** button to add the tab to the custom tab list.

7 Repeat steps 5-6 for every tab you wish to set in the selected paragraph(s). The order in which you enter each custom tab stop is the order in which the tabs will be applied in the selected paragraph(s).

8 Select a tab alignment from the **Tab Alignment** radio buttons.

9 Select a tab leader from the **Tab Leader** radio buttons.
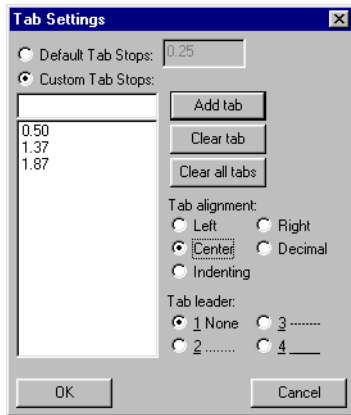
10 Click **OK**.

To set custom tabs using the horizontal ruler:

These instructions assume that the Report whose paragraph settings you want to modify is open.

1 Select the paragraph(s) to which you want to assign a tab.

2 Click the **Tab** button at the far left of the horizontal ruler until it changes to the type of tab you want (e.g., left, right, centered).

3 Click the horizontal ruler where you want to set a tab stop.

4 Repeat steps 2-3 for each tab stop you want to define.
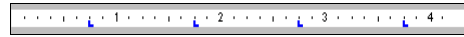
To apply a tab:

These instructions assume that the Report whose paragraph settings you want to modify is open.

1 Click the place in the paragraph where you want to insert a tab.

2 Press the **TAB** key on the keyboard.

*Note: If you press the TAB key and nothing happens, it means that no tab has been set for the paragraph and that you need to define one. See **Defining Tabs on page XX.**.*

Editing tab stops

These instructions assume that the Report whose paragraph settings you want to modify is open.

You can edit the placement of existing tray tab stops.

To edit a tab stop:

1 Do one of the following:

• To edit custom tab stop, simply click the tab stop on the horizontal ruler and drag it to the desired location.

- To edit a default tab stop, open the Tab dialog and change the value in the **Default Tab Stop** field to the desired value.

Deleting tab stops

You can delete tab stops. Deleting tab stops removes them from the Report completely.

To delete a tab stop:

These instructions assume that the Report whose paragraph settings you want to modify is open.

1   Do one of the following:

- To delete a custom tab stop, simply click the tab stop and drag it onto the Report.
- To delete a default tab stop, open the Tab dialog and delete the value in the Default Tab Stops field.

Paragraph indentation

The left and right indents of a paragraph determine where a paragraph's left and right edges are positioned. You can use paragraph indents to manipulate the way information is presented in your reports.

These instructions will show you how to use the indent feature on the Format Toolbar. You can also use the Indent and Spacing dialog box. Those instructions are in the Special Indents section that follows.

Special indents

There are three special indent patterns available in Kinnexus that are also available in most word processors. Kinnexus supports the first line, hanging, and outline indent styles.

First Line

The first line indent style indents the first line of a paragraph. Each subsequent line in the paragraph returns to the left margin. This is the standard indent style for letters.

Hanging indent

A hanging indent is the exact opposite of a first line indent. A hanging indent has the first line against the left margin, and all subsequent lines are indented.

Outline

The outline style moves the entire margin in for each level of an outline.

To apply a special indent:

1   Select the paragraph(s) you want to apply a special indent to.

2   Right click the Report and select **Paragraph Properties** from the drop-down menu. The Paragraph Format dialog will appear.
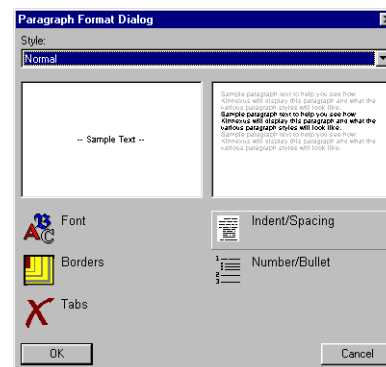
3   Click the **Spacing and Indent** button. The Spacing and Indent dialog will appear.

4   Click the **Special** drop-down arrow. A drop-down list of available special indents will appear.

5   Select the desired special indent from the drop-down list.
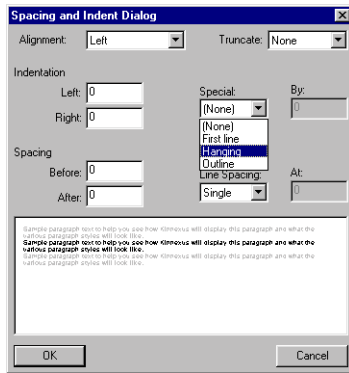
6   If you selected *First Line* or *Hanging* indent, click in the **By** field and enter an indent value. Indents are measured in inches.

7   Click **OK**.

Numbers and bullets

You can add numbers or bullets to existing lines of text. Numbers and bullets allow you organize the text in your reports and emphasize important information. Numbers and bullets appear at the beginning of paragraphs, and you can choose from several different styles.

Selecting a numbering or bullets style:

You can designate which style—numbers or bullets-you wish to use in the Numbering and Bullet Settings dialog. You can even choose between several bullet styles and numbers styles.

To select a number/bullet style:

1   Right-click the Report and select **Paragraph Properties** from the pop-up menu. The Paragraph Format dialog appears.

2   Click the **Number/Bullet** button. The Bullet and Numbering Settings dialog box appears.

3   Click the desired bullet or numbering style by clicking it.
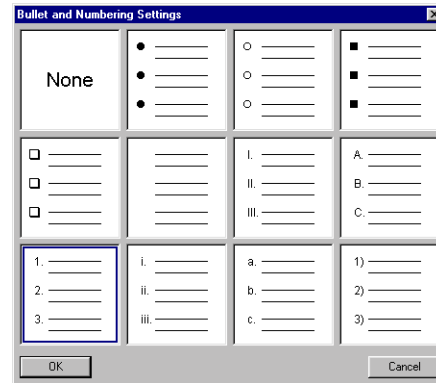
4   Click the Bullet and Numbering Settings **OK** button.

5   Click the Paragraph Properties **OK** button.

Applying numbers or bullets to a list

Once you have selected a style, you can apply numbers or bullets to the text in your reports using the Number/Bullet button on the Report Toolbar.

There is only one button on the Report toolbar for both numbers and bullets. If you click the Numbers/Bullet button, the number or bullet style you last used is applied to the selected text.

To add bullets or numbered lists to text:

1   Highlight the paragraph(s) you want to format with bullets or numbered lists.

2   Click the **Number/Bullet** button on the Report Toolbar.

Report styles

A style assigns a group of font and paragraph set-
tings to text in one simple process. For example, per-
haps you want to make the property address on your
Report stand out. You can create an Address style
that specifies 20 pt font size, Times New Roman
font, and center alignment. Instead of setting the font
size, font, and alignment each time you want to
make an address stand out, you can simply apply the
Address style.

You can create as many styles as you want. The fol-
lowing sections will help you apply, modify, and
create styles. Each set of instructions assumes that
you are currently editing a form.

To apply a style:

1   Do one of the following:

• If you are applying a style to one line only, click
in the line you want to change.

• If you are applying a style to more than one line,
highlight the lines you want to change.

2   Click the **Style** button on the Report Toolbar. A
pop-up menu containing a list of available Styles
appears.

3   Select the style you desire from the pop-up
menu.
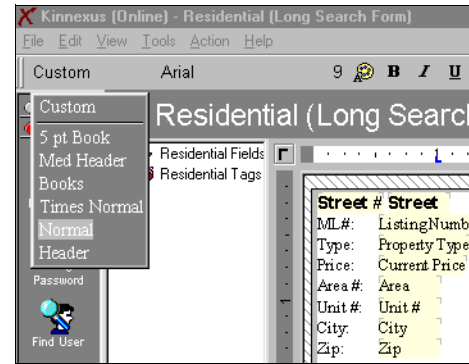
*Note: If you have edited the paragraph or font char-
acteristics by hand, the style is designated as Cus-
tom.*

Create a new style

You can create as many styles as you want. Follow
these instructions to create a new style.

To create a new style:

1   Click **Tools>Styles Management**. The Style
Management Dialog box appears.

2 Click the **Add** button. The Style Format Page appears.
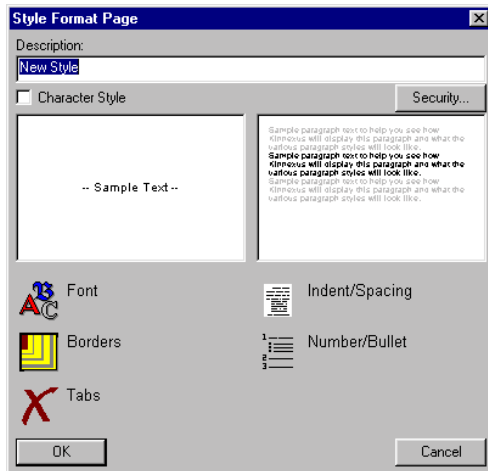
3 Click in the **Description** box and type a name for the style.

4 Use the Style Format Page buttons to set the Font, Borders, Tabs, Indent/Spacing, and Number/ Bullet settings for your style. The Style Format Page buttons function exactly like the Paragraph Format buttons. If you are unsure how to set font, border, tray tab settings, etc., see Font Settings on page XX and Paragraph Settings on page XX.

5 Click **OK**.

Modify a style

You can modify any existing style, providing you have adequate access. Most likely, you will be able to edit only the styles you have created. Follow these instructions to modify an existing style.

To modify a style:

1 Click **Tools>Styles Mangement**. The Style Management Dialog box appears.

2 From the Available Styles window, select the style you would like to edit.

3 Click the **Properties** button. The Style Format Page appears.

4 If you want to change the name of the style, click in the **Description** field and type the new style name.

5 Use the Style Format Page buttons to set the Font, Borders, Tabs, Indent/Spacing, and Number/ Bullet settings for your style. The Style Format Page buttons function exactly like the Paragraph Format buttons. If you are unsure how to set font, border, tray tab settings, etc., see Font Settings on page XX and Paragraph Settings on page XX.

6 When you are through making modifications to the style, click **OK**.

Delete a Style

If you have created a style that you are no longer using, you can delete it at any time. Follow these instructions to delete a style.

To delete a style:

1 Click **Tools>Styles Management**. The Style Management dialog will appear.

2 From the Available Styles window, select the style you would like to delete.

3 Click the **Delete** button.

Report borders

You can place a border around a Report, Report page, frame, and/or paragraph. The only thing that is different between adding a border to a Report, page, frame, or paragraph is how you get to the Borders dialog.

To open the page Borders dialog:

1 Click **File>Page Layout**.

2 From the Available Page Layouts window, select the layout you want to add a border to.

3 Click the **Properties** button. The Page Layout dialog appears.

4 Click the **Borders** button on the Page Layout dialog. The Borders dialog opens. If you are unfamiliar with Borders dialog controls, see chapter XX.

To open the Report, frame, or paragraph Borders dialog:

1 Right click the Report, frame, or paragraph you want to add a border to. The right-click menu appears.

2 Select the appropriate menu option from the right-click menu:

• To add a border to the Report, select **Report Properties**. The Report Properties dialog appears.

• To add a border to a frame, select **Frame properties**. The Frame Properties dialog appears.

• To add a border to a paragraph, click **Paragraph properties**. The Paragraph Properties dialog appears.

3 Click the Borders button. The Borders dialog opens. If you are unfamiliar with Borders dialog controls, see chapter XX.

Presentation Views

A Presentation View is really several different views combined into one view. For example, you can add a List View, Report, and Comparison View to a presentation. You can also add title pages, tables of content, and boilerplate forms to tie the views together. Presentation views are convenient for longer, detailed presentations and are commonly used in MLS books and CMA packets.

Creating a Presentation View

See Chapter XX.

Adding views to a Presentation View

This section discusses views with current and fixed data sets, and shows you how to add them to a Presentation View.

Current data set vs. Fixed data set

A data set is a group of records in the database that is defined by search criteria. Running a search in Kinnexus assembles a data set consisting of items that meet the search criteria you entered.

There are two kinds of data sets used in presentation views: current data sets and fixed data sets. The current data set is the list of records you are currently viewing. A list of search results from a search you have just run is an example of a current data set. A fixed data set is a set of search criteria that is stored with the Presentation View. The difference between the two data sets is that current data sets are constantly updated, assuring that views with current data sets always contain the most recent information. Fixed data sets are permanently associated with the Presentation View. Once a fixed data set has been added to a Presentation View, it never changes unless you delete it.

Because current and fixed data sets behave differently, it is important to know which kind of data set the view you are adding contains.

Telling the difference between current and fixed data set views is very simple. Open a Presentation View in the View Portfolio or Design mode. The View Chooser appears at the left of the window. Click the + sign next to *(Current data set)* in the View Chooser. A list of all available current data set views displays. All other views in the View Chooser have fixed data sets.
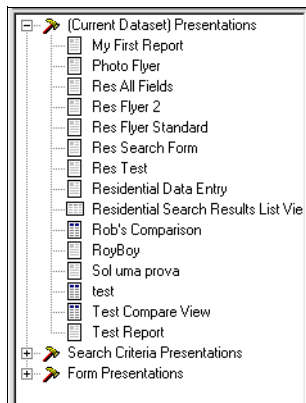
View Chooser showing views containing current data sets.

View Portfolio vs. Design Mode

To create a presentation, you combine several views into one by dragging desired views, such as List Views, reports, title pages, and tables of content, to the Presentation View.

There are two places in Kinnexus where you can add views to a presentation: The View Portfolio and Design Mode. You can add views to a presentation

in the View Portfolio at any time. To add views in Design mode you must be in a Presentation View that contains some data—a search results summary, for instance.

To add views to a presentation in the View Portfolio:

These instructions assume that you have access to a Presentation View. If you do not have access to a Presentation View, you will need to create one.

4 Click the **Tools** tray tab.

5 Click the **View Portfolio**.

6 Locate the Presentation View to which you want to add a view or views.

7 Double-click the Presentation View to open it.
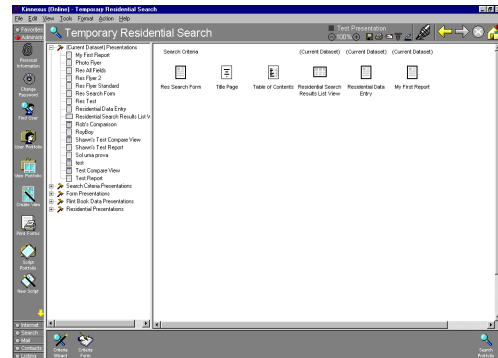
8 Locate the view you want to add in the View Chooser.
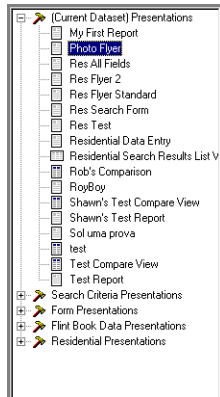
9 Click the desired view and drag it to the Presentation View window.
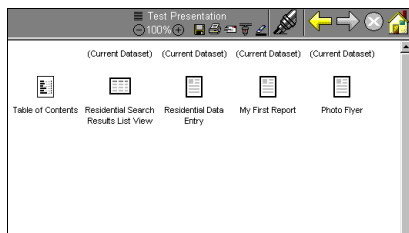
To add views to a presentation in Design mode:

These instructions assume you are looking at search results in a Presentation View.

1 If the current view is not a Presentation View, click the **Current Form Indicator** and select a Presentation View.

2 Right-click the screen.

3 Select **Design mode** from the right-click menu.

4 Locate the view you want to add in the View Chooser.

5 Click the desired view and drag it to the Presentation View window.

Arranging the views in a Presentation View

You can rearrange the order of views you have added to a Presentation View.

To rearrange views:

*To rearrange the views, you must be looking at the presentation in the View Portfolio or looking at a list of search results in a Presentation View in design mode.*

1 Highlight the view you want to move.

2 Use the **LEFT** and **RIGHT** arrow keys on the keyboard to move the view into the desired position.

Deleting the Views in a Presentation View

You can delete any view from a Presentation View.

To delete a view:

In order to delete a view, you must be looking at the presentation in the View Portfolio, or looking at a list of search results in Presentation View in Design mode.

1 Highlight the view you want to delete.

2 Press the **DELETE** button on the keyboard.

Presentation level settings

Presentation level settings affect the entire presentation, including all the views. Using the presentation settings, you can assign a category, description, and page layout to a presentation. You can also determine the availability status of the presentation and organize the presentation data sets.

Presentation level settings are found on the Presentation properties dialog. To open the Presentation Properties dialog, you must have the Presentation View open in the View Portfolio or be looking at list of search results in a Presentation View in Design mode.

To open the Presentation Properties dialog:

These instructions assume that you are in a Presentation View in the View Portfolio or you are looking at a list of search results in a Presentation View in Design Mode.

1 Right-click the Presentation View.

2 Select **Properties** from the right-click menu.

PRESENTATION PROPERTIES
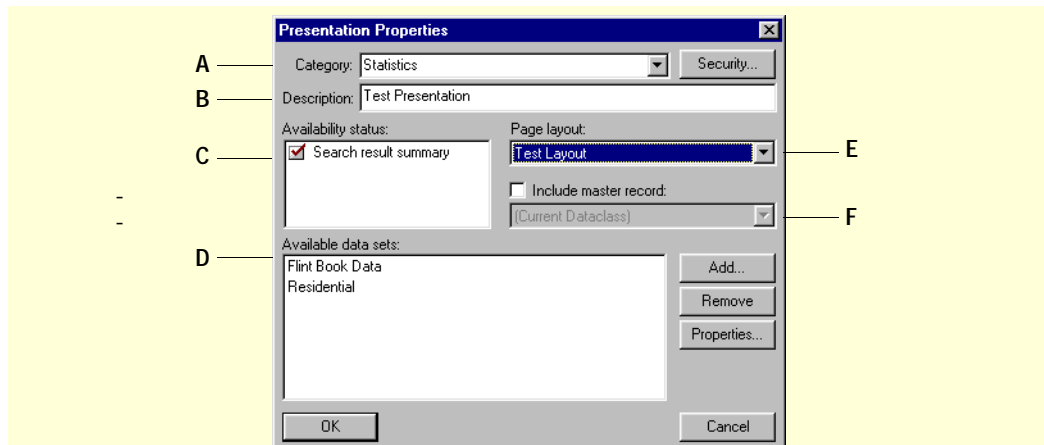
A If you want to change the category for your Presentation View, select a different category from the Category drop-down menu or click in the Category field and type in a new category.

B If you want to change the description of the Presentation View, click in the Description field and type a new description.

C The Availability Status checkboxes represent types of data you can view in Kinnexus, such as data entry, search result, and search criteria data. Select those data types you would like available for viewing with the Presentation View. For example, if you select the search results summary checkbox, the Presentation View will be available when you are viewing search results.

D A list of available data sets appears in the Available Data Sets window. You can add, delete, or edit the properties of the available data sets. For more information, see pageXX.

E If you want to use the current page layout, select **(Current Page Layout)** from the Page Layout drop-down menu. If you want to use a different page layout for the presentation, select New Layout from the Page layout drop-down menu.

F If the current data set is a result of a CMA search, and you would like to include the CMA subject property in the presentation, select the Include Master Record checkbox.

Available data sets

A list of available data sets appears in the Available data sets window. You can add, delete, or edit the properties of the available data sets.

To add a data set:

1 Click the **Add** button on the Presentation Properties dialog. A Wizard appears.

2 Enter search criteria as you would in a normal search Wizard. The new data set will be comprised of items that match the search criteria you enter in the Wizard.

3 When you have finished entering search criteria, click the **Go** button. The Wizard closes and the new data set appears in the Available data sets window.

To remove a data set

1 Highlight the data set you want to remove.

2 Click the **Remove** button.

To edit a data set

1 Highlight the data set you want to edit.

2 Click the **Properties** button. A Wizard containing the selected data set's criteria appears.

3 Make any desired changes to the search criteria.

4 When you have finished editing the search criteria, click the **Go** button. The Wizard closes and your changes save.

View level settings

View level settings let you alter the properties of individual views in the Presentation View. Each view type in a Presentation View has its own properties dialog box.

There are four different possible views you can add to a Presentation View:

• **Section view** A section view has a data set associated with it. Examples of section views include List Views, Comparison Views, reports, etc.

• **Title Page view** A Title page view is a title page template that you can customize to fit the needs of your particular Presentation View.

• **Table of Contents view** A Table of Contents view is a Table of Contents template, which like the Title page view, you can customize.

• **Form view** A form view has no data set associated with it. Forms are essentially boilerplate—you must enter any information you want to appear on it. For example, you might want to create a form view containing a realtor name or company information.

Note: You can also add an Index to a presenation by adding a List View with index-approriate fields, such as Index Page Number, Listing number, or City to the end of the presenation. Select the Include in Index checkbox on the Presentation Section Properties dialog of all other section views in the presentation.

Section View Settings

The Presentation Section Properties dialog allows you to determine the content and appearance of data in Presentation Views, List Views, Comparison Views, and Report Views. When they appear in presentation views, these views referred to as "sections."

To open the Presentation Section Properties dialog:

1   Click a section view whose properties you would like to view and/or change. The selected view highlights.

2   Right-click the selected section view.

3   Select Section Properties from the right-click menu. The Presentation Section Properties dialog opens.

PRESENTATION SECTION DIALOG
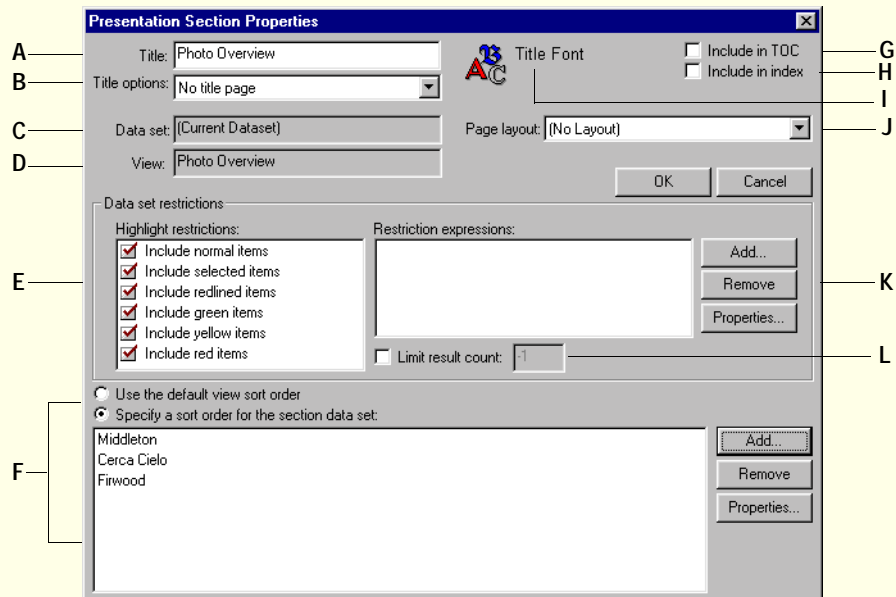
A Change the section view title by typing a new name in the Title field.

B Determine how the section title will appear by selecting the desired title option from the Title Options drop-down menu.

C The Data set field tells you what data set this section uses. This field is not editable.

D The View field contains the name of the view this section uses. This field is not editable.

E Limit the displayed data to items that are highlighted a certain color. For more information, see page XX.

F Determine the sort order of the information in the selected Report view. For more information, see page XX.

G Select the Include in TOC checkbox if you want the section view title to appear in the Presentation View table of contents.

H Select the Include in Index checkbox if you want the listings in the selected section view to appear in the index.

I Change the title font using the Title Font button.

J Select a page layout that will apply only to the selected section view.

K Determine what data set information will be displayed in the selected view using expressions. For example, perhaps the data set associated with the current section contains property listings of all statuses. You can organize the section view so that only active and sold listings are displayed in the Presentation View. For more information, see page XX.

L Limit the results count after data set restrictions have been applied. For example, say you set a restriction that restricts the data in the section to sold listings only. If you set the limit result count to 20, only the first 20 sold listings will display (as opposed to displaying the first 20 listings in the data set.) The Limit Result Count checkbox and field are only enabled when there are some Data set restrictions.

Data set restrictions

Data set restrictions allow you to determine what data set information will be displayed in the selected view. For example, perhaps the data set associated with the current section contains property listings of all statuses. You can organize the section view so that only active and sold listings are displayed in the Presentation View.

To add a data set restriction:

You can add as many data set restrictions as you wish.

1   Click the **Add** button to the left of the Data set restrictions field. A Presentation Restriction Expression dialog appears.

2   Do one of the following:

•   Click in the Restriction Expression field and type in a restriction expression

•   Right-click the Restriction Expression field and select a restriction expression from the pop-up expression list.

3   Click **OK**.

To remove a data set restriction:

1   Highlight the data set restriction you want to remove in the Data Set Restrictions field.

2   Click the **Remove** button to the left of the Data set restrictions field.

To change data set restriction properties:

1   Highlight the data set restriction whose properties you want to change.

2   Click the **Properties** button to the left of the Data Set Restrictions field. The Presentation section restriction dialog containing the selected expression appears.

3   Make any desired changes to the expression by typing changes in the **Restriction Expression** field

or by using the **Restriction Expression** right-click pop-up menu.

Limit Result Count

The Limit Result Count checkbox and field are only enabled when there are some Data set restrictions. Limiting result count in the Presentation section properties dialog limits the results count after data set restrictions have been applied. For example, say you set a restriction that restricts the data in the section to sold listings only. If you set the limit result count to 20, only the first 20 sold listings will display (as opposed to displaying the first 20 listings in the data set.)

To set the result count:

1   Place a check mark in the **Limit Result Count** checkbox by clicking it.

2   Click in the **Limit Result Count** field and type in the desired number of results.

Highlighter restrictions

To the right of the Data Set Restrictions field is a field containing highlighter checkboxes. These checkboxes function much like the data set restrictions, in that they allow you to limit what data displays in the selected view. For example, you can choose to display only those section items that are highlighted in green or red, or you can choose to display all section items except those that are green or yellow. By default, all checkboxes, and therefore all items regardless of highlighter color, are selected for display in the view. Each checkbox has a highlighter color or style that it represents. If you remove the check mark from the box, all items that are highlighted in the highlighter color or style that the checkbox represents will be hidden in the view.

Because you cannot highlight items in the Presentation View, you must select another view to highlight items. Once items have been highlighted, you can return to the Presentation View Presentation Section properties dialog and set restrictions according to the section items' highlighter color.

To set highlighter restrictions:

1 Click the **Current Form indicator**. A list of alternate views displays.

2 Select any view in the Current Form Indicator that is not a Presentation View.

3 In the alternate view, highlight any desired items.

4 When you have finished highlighting items, click the **Current form indicator** and select the Presentation View you are working on.

5 Right click the Presentation View and select **Design mode** from the right-click menu.

6 Highlight the section to which you are applying highlighter restrictions.

7 Right-click the highlighted section and select **Section properties** from the right-click menu.

8 Remove the check mark from each checkbox that represents a highlighter color or style you wish to hide in the Presentation View.

**9** Click the **OK** button.

Sort order

Sort order determines how the information in a selected Report is organized. For instance, a Report view can be sorted first by area, then by street, and then by price. Sorts are set with expressions, and are only available for Report views. You can use the default sort order or set your own sort order.

To use the default sort order:

10 Select the Use The Default View Sort Order radio button.

To set your own sort order,

1 Select the **Specify A Sort Order For The Section Data Set** radio button.

2 Click the Add button. The Sort Order Propertries dialog displays.
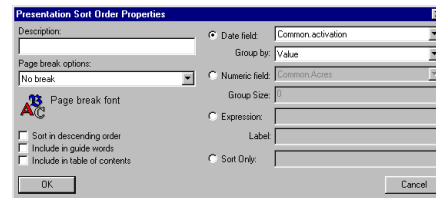
3 Click in the Description field and type a description of the sort order you want to create.

4 Click the Page Break Options drop-down arrow and select the desired page break option.

5 To select font settings for page break font, click the Page Break Font button

6 Select the desired sort settings from the checkboxes located below the Sort Expression field:

• *Include Guide Words* Guide words appear at the outer-top corner of Report pages. They are references to the data contained on each page. If you selected the Guide words checkbox for the City, Price and Area sort expressions mentioned above, guide words would appear in the following format on the Report pages: Middleton, 175,000 - 183,500, 515 Southwood Drive.

• *Include in Table of Contents* If you select this checkbox the sort expression will be available for inclusion in the Presentation View table of contents.

• *Sort in descending order* By default, sort orders are sorted in ascending order. Select this checkbox if you want the sort order sorted in descending order.

7 Do one of the following:

• If you want to sort by a date field, select the Date Field radio button. Click the Date Field drop-down menu and select the date field you want to sort by. Click ther Group By drop-down menu and select what date part you want to group the sort order by.

• If you want to sort by a numeric field, select the Numeric Field radio button. Click the Numeric Field drop-down menu and select the numeric field you want to sort by. If you want the listings in the sort order to be grouped, click in the Group Size field and type the number of listings you want in each group.

• If you want to sort by an expression, click the Expression radio button.

• If you want to sort by the default data set sort order, click the Sort Only radion button.

8 Click **OK**.

9 Repeat steps 1-7 for each sort order you want to create. Report items are sorted in the order the sort orders are added.

Title page settings

This dialog allows you to format your presentation title page
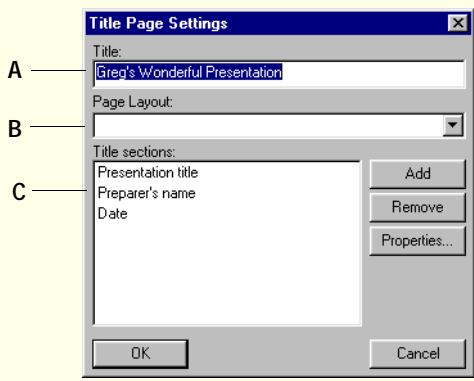
To open the Title page settings dialog:

These instructions assume you are in a Presentation View, in design mode.

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TITLE PAGE SETTINGS

1 If there is no title page view in the Presentation View, drag a title page view from the View Chooser to the Presentation View.

2 Highlight the title page.

3 Right-click the highlighted title page and select **Section Properties** from the right-click menu.

A Type the desired title for your title page in the Title field.
B Select a page layout for the Title Page from the Page Layout drop-down menu.

C Select the title sections you want to appear on the title page using the buttons to the right of the Title Sections window. See page XX for a detailed description and set of instructions.

Adding, removing, and editing title page sections

Title sections are titles that can be added to the title page. There are four different title sections you can add: The Presentation Title, the Preparer's Name, the Date, and a customized Expression.

The following sets of instructions show you how to add, remove and edit these title sections.

To add a title section to a title page:

These instructions assume the Title Page Settings dialog is open.

1 Click the **Add** button to the right of the Title Sections window.

2 Click the **Section Type** drop-down arrow.

3 Do one of the following:

• If you want the name of the presentation to appear on the title page, select Presentation Title from the drop-down menu.

• If you want the name of the preparer of the presentation to appear on the title page, select Preparer's Name from the drop-down menu.

• If you want the date to appear on the title page, select Date from the drop-down menu.

• If you want to specify a custom title section, such as your phone number or address, to appear on the title page, select Expression from the drop-down menu and enter the desired expression into the Expression field.

4 Click the **Justify settings** drop-down menu.

5 Click the desired justfication for the selected title section.

6 If desired, click the **Font** button to specify new font settings for the selected title section.

7 Click **OK**.

8 Repeat steps 1-6 until you have added all the desired title sections.

To remove a title page title section:

These instructions assume the Title Page Settings dialog is open.

1 In the Title Section window, select the title section you want to remove.

2 Click the **Remove** button to the right of the Title Sections window.

To edit a title page title section:

These instructions assume the Title Page Settings dialog is open.

1 In the Title Section window, select the title section you want to edit.

2 Click the **Properties** button to the right of the Title Sections window.

3 Make any desired changes to the title section properties.

4 When you are through making changes to the selected title section, click the **OK** button.

Table of Contents settings

This dialog lets you set up the Presentation View table of contents. You can select a Tabel of Contents title, and select which headings and titles will be included in the table of contents. You can also assign the dot leader, as well as an indent value to each title or header you choose to include in the Table of Contents.

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**To open the Table of Contents Settings dialog:**

These instructions assume you are in a Presentation View, in design mode.

1 If there is no Table of Contents page view in the Presentation View, drag a Table of Contents page view from the View Chooser to the Presentation View.

2 Highlight the Table of Contents page.

Right-click the highlighted Table of Contents page and select **Section Properties** from the right-click menu.

TABLE OF CONTENTS SETTINGS
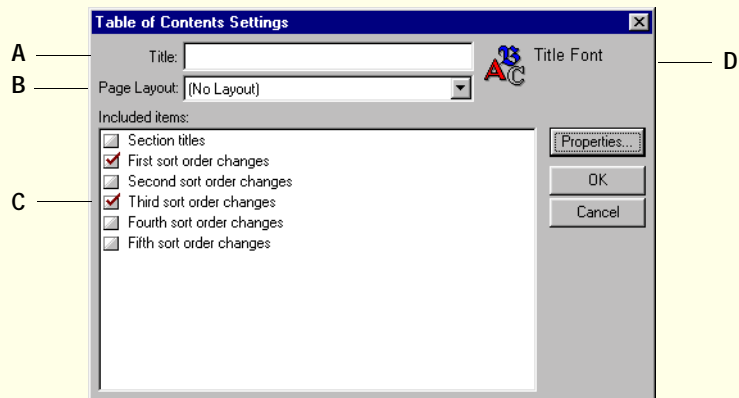
A Enter a title for the table of contents.

B Choose a Page Layout from the Page Layout drop-down menu.

C Select which Report sort order items you would like to include in the table of contents. Recall that you selected which sort order items would be available for inclusion in the Table of Contents in the Presentation section properties dialog. For instructions on how to format sort order items in the Table of Contents, see page XX.

D Click the Title Font button to select the desired font for the Table of Contents.

Format table of contents

You can add a dot leader, specify and indent, and change the font of any title or header available for inclusion in the Table of Contents.

To format Table of Contents titles or headers:

3 From the Included items window, select the sort order you would like to format.

4 Click the Properties button. The Presentation Contents Page Item Properties dialog appears.

5 Click the Leader Type drop-down arrow and select the desired leader type from the drop-down menu.

6 Click in the Indent Width field and type the desired indent. Indent width is measure in inches.

PRESENTATION FORM PROPERTIES

7 Click the Font button to change the font settings for the selected sort order title.

Form settings

The Presentation Form Properties dialog lets you select a title and page layout for the selected form.

To open the Presentation Form Properties dialog:

8 In design mode, right-click the form whose settings you would like to change.

9 Select Section Properties from the right-click menu.

Presentation Form Properties	☒
A —— Title: Land Listing Profile	✗ Title Font ☐ Include in TOC —— C
B —— Title options: No title page ▼	—— D
View: Land Listing Profile	Page layout: ▼ —— E
OK	Cancel

A Type a title for the form.

B Determine how the from title will appear by selecting the desired titled option from the Title Options drop-down menu.

C Select the Include in TOC checkbox if you want the form title to appear in the Table of Contents of the presentation.

D Change the title font settings by clicking the Title Font button.

E Select a page layout that will apply only to the selected form view from the Page Layout drop-down menu.

About Wizards

The *Searching* chapter in the *Beginner's Guide to Kinnexus* shows you how to use Wizards to perform searches. This section shows you how to create your own search Wizard. Creating your own search Wizard gives you complete control over what fields, controls, and settings a Wizard uses.

There are four search Wizard creation topics covered in this section:

• Creating a new search Wizard record
• Managing search Wizard controls
• Managing search Wizard pages
• Setting search Wizard properties

Creating a new Wizard record

Creating a new search Wizard record creates a page. This page is the first page of the Wizard. Once the initial Wizard page has been created, you can add more pages to it.

To create a new Wizard record See *Creating a new view* on pageXX.

Wizard toolbar

Wizards in the View Portfolio have a unique toolbar. The Wizard toolbar contains commands for designing and formatting wizards. THe following graphic tells you what each button on the Wizard toolbar does. See the page number referred to in the table below the graphic fro instructions on how to use each command

WIZARD TOOLBAR

A Click to add a new page to the end of the Wizard.

B Click to delete a page from the end of the Wizard.

C Click to edit the current or selected Wizard page.

D Click to open the Wizard Properties dialog box.

E Click to open the page properties for the selected or current Wizard page.

F Click to open the control properties for the current or selected Wizard control.

G Click to set tabs for the selected control(s).

H Click to add a text control to the current Wizard page.

I Click the desired alignment button to align the selected control(s).

Wizard pages

The following sets of instructions show you how to add, delete, and edit Wizard pages. Setting branches for Wizard pages is also briefly discussed.

Adding search Wizard pages

When you add a new Wizard page, the page is added to the end of the Wizard. The number of pages you can add to a Wizard is unlimited.

To add a page to the Wizard:

1 Click the last Wizard page.

2 Click the **Add Page** button on the toolbar.

Deleting search Wizard pages

You can remove the last page of the Wizard, but Kinnexus does not allow you to remove pages from the middle of the Wizard.

To remove a Wizard page:

1 Click the last Wizard page.

2 Click the **Delete Page** button on the toolbar. The last page of the Wizard will be removed.

Editing Wizard pages

You can edit the contents and settings of individual Wizard pages.

To edit a Wizard page:

1 Select the page you want to edit.

2 Click the **Edit Page** button on the toolbar.

3 Make any desired changes to the page.

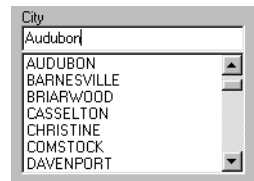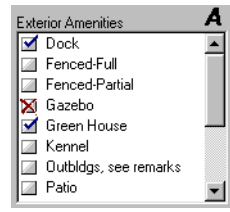4 When you are through making changes, close the page.

Branching Wizards

Normally a search Wizard has only one line of progression: from the first page to the last page. It is possible, however, to have the Wizard page progression branch based on a particular value. For example, a Wizard could be constructed to offer different pages if the person indicated they wanted to search sold properties. If you would like to set a branch in your Wizard, see the chapter on branching in the *Administrator's Manual.*

Wizard controls

Wizards are made up of database fields placed on a Wizard page. Each database field has a control associated with it. A control is a tool for entering data. Text boxes, list boxes, combo boxes, and Boolean fields are all examples of controls. For example, per-haps the City field in your database is a combo box. If you add the City field to your Wizard page, the City field will appear as a combo box into which users can enter the desired city value.

The following table contains a list of controls and how they might be used:

Wizard Control	How it is used	Example
Edit	Useful for searching text, numbers, and dates.	
Range	A range control has a minimum box and a maximum box. If you enter a value only in the left field, Kinnexus searches for listings that are equal to or greater than the value. If you enter a value only in the right field, Kinnexus searches for listings that are equal to or less than the value. If you enter values for both fields in a range control, Kinnexus searches for listings that fall within the two values.	
Combo	Combines a text box with a list of search items. You can either search by typing data into the text box or by selecting an item from the list.	
Feature	Searches Boolean and feature fields. An 'x' means you don't want the item. A check mark means you want the item. An empty box means it doesn't matter whether the property has the item or not.	

Wizard controls

List	Used to search items in a list. A checkmark next to an item means you want to search for the item. An empty checkbox next to an item means it doesn't matter whether the property has the item or not.	
Key	Functions much like a list control, except that the list of options in a key control come from key identifications that link to another table in the database.	
Static text	Allows you to add text, such as a set of instructions, to the Wizard. Users will not be able to edit static text controls.	
Bitmap	Allows you to place graphics on the Wizard. Users will not be able to edit bitmap controls.	
Map	Allows you to use a map to designate a search area.	

Wizard controls

Adding controls

Once a Wizard record has been created, you can open the Wizard edit page and add controls to it. You can add as many controls to a Wizard page as you want.

To add controls to the Wizard:

1 Click the **Tools** tray tab.

2 Click the **View Portfolio** icon. The View Portfolio opens.

3 Find the name of the Wizard you want to add controls to and double-click it. Icons representing each page of the Wizard appear. To the left of the icon is the Field Chooser.

4 Double-click the icon representing the page you want to edit. The Wizard page appears in edit mode.

5 Find the field you want to add in the Field Chooser.

6 Drag the field from the Field Chooser and drop it on the Wizard.

7 Repeat steps 5-6 for every field you wish to add to the Wizard page.
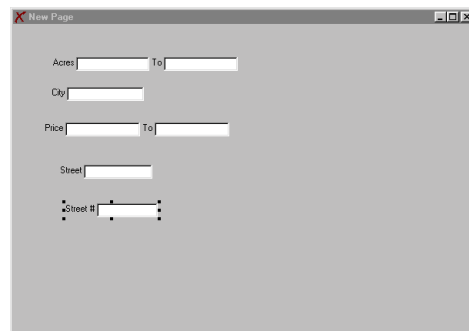
Editing Controls

You have considerable freedom in determining how the controls will look on the Wizard. The following sets of instructions will show you how to re-size, move, align, and remove controls on a Wizard page.

To re-size a control:

1 Click the control you wish to resize. Eight dots appear around the field, one at each corner of the control, and a dot half way between each corner.

2 Using the left mouse button, click one of the dots.

3 Without releasing the left mouse button, drag the field to the desired size.

4 When the control is at the desired size, release the left mouse button.

To move a control:

1 Using the left mouse button, click the control you wish to move.

2 Without releasing the left mouse button, drag the control to the desired location.

3 When the control is in the desired location, release the left mouse button.

Note: You can move a control anywhere on the form, including on top of another control, but you cannot move the control off the form.

To move several controls at once:

**1** Hold down the **CTRL** key on the keyboard while you click all the controls you want to move.

2 While still holding down the **CTRL** key, click one of the selected controls.

3 Drag the control to a new location on the Wizard page. All the selected controls move.

4 When the controls are in the desired position, release the left mouse button and the CTRL key.

To align controls:

**1** Click a control that is already at the desired size and alignment.
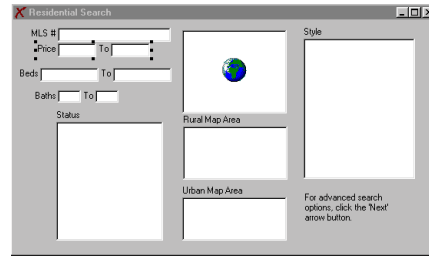
2 Hold down the **CTRL** key on the keyboard and select the controls you want to align.
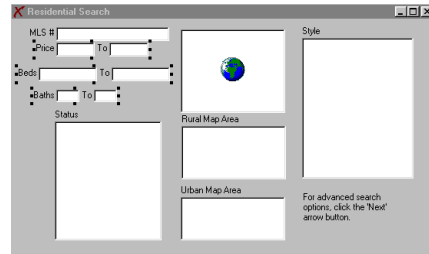

3 Click the desired alignment button on the toolbar. The first alignment tool you select is the anchor. Everything keys off the first control.

Button	Alignment	What it does
	Left	Aligns the left side of all the selected controls with the left side of the first control you selected.

Alignment options

Button	Alignment	What it does
	Right	Aligns the right side of all the selected controls with the right side of the first control you selected.
	Center	Centers all of the selected controls with the center of the first control you selected.
	Horizontal	Puts the selected controls on the same horizontal line as the first control you selected.
	Align	Changes the alignment of the selected controls to match the alignment of the first control you selected.
	Align and SIze	Changes the size and alignment of the selected controls to match the size and alignment of the first control you selected.
	Vertical	Places the selected controls at equal distances below the first control you selected in the order the controls were selected.

Alignment options
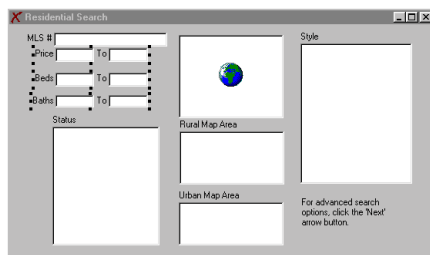
Aligned controls

To remove controls from the Wizard:

1 Click the control you wish to delete.

2 Press the **DELETE** button on the keyboard.

Editing control captions

Each control has a default caption. For example, the price field control might have 'Price' as the default caption. If you want the caption to read 'List Price' instead of just 'Price' you can make that change in the Control Properties dialog.

Field caption

To edit a control field caption:

1 Double-click the field whose caption you wish to edit. The Control Properties dialog box appears.

2 Click in the **Caption** field and make any changes to the field caption you desire.

3 When you are through making changes to the caption, click the **OK** button.

Changing field control type

The control type of a field determines how you enter data into that field. For example, if the Price field is a range control, you can enter two values, but if the Price field is an Edit control, you can only enter one value. You can change the default control type of a field after you have added it to the Wizard from the Field Chooser.

Not all control types are available for each data type. The following table contains the control types available for each data type.

Data type	Possible controls
Integer	Edit Control, Range Control
Real	Edit Control, Range Control
Text	Edit Control

Control types available for each data type

Dates	Edit Control
Lists	Combo Control, List Control
Boolean	Check Control
Features	

Control types available for each data type

To change the control type:

1 Click the **Tools** tray tab.

2 Click the **View Portfolio** icon.

3 In the View Portfolio, double-click the Wizard containing the field whose control type you want to change.

4 Double-click the control whose control type you want to change. The Control Properties dialog appears.

5 Click the **Type** drop-down arrow. A drop-down menu containing a list of available control types will appear.
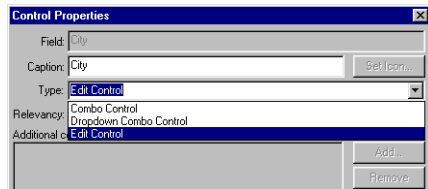
6 Click the control type you wish to apply to the selected field.

7 Click the **OK** button.

Creating range controls with two fields

If your board has defined minimum and maximum range fields, range controls can be set to search two different fields—one for the minimum field, and one for the maximum. This is helpful for commercial realtors who are searching Maximum Square Feet and Minimum Contiguous Square Feet.

You create a range control with two fields by dragging a field from the Field Chooser to the Wizard. This will be the primary field for your range control. With the Control Properties box, you will assign a second field to the second box of the range control.

To create a range control with two fields:

1 Click the **Tools** tray tab.

2 Click the **View Portfolio** icon.

3 In the View Portfolio, double-click the Wizard containing the field whose control type you want to change.

4 Drag the field that you wish to be the lower, or minimum, number of the range to the search Wizard page from the Field Chooser.

5 Double-click the field you just placed on the Wizard. The Control Properties box appears.

6 Click the **Type** drop-down arrow and select **Range Control** from the drop-down menu. Notice that as you make the change, the Secondary Field window becomes enabled.
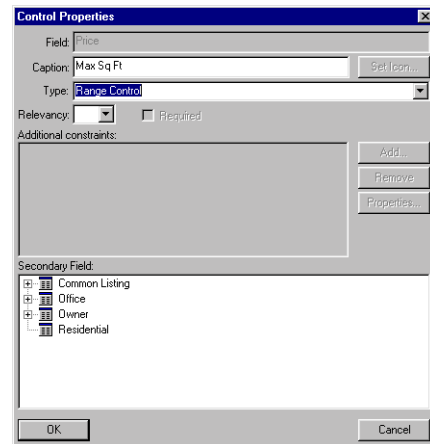
7 Open the tables at the bottom of the dialog box to select the secondary field. Clicking the plus sign reveals the fields in the table.

8 Find the field you want to use as the secondary field in the range control.

9 Click the desired secondary field.

10 Click the **OK** button.

Setting the default relevancy

Each control field on a Wizard has a default relevancy value. This is the relevancy value assigned to the field when you do a relevancy search using this Wizard.

Every field in the Field Chooser has a default relevancy assigned to it in the Field Properties. If you do not set the relevancy for a control field in the search Wizard, the default relevancy assigned in the Field Properties will be used. If you choose to set a relevancy value for a field when creating the Wizard, it will override the relevancy set in the Field Properties.

To set the default relevancy for a control:

Note: These instructions assume that the Wizard you are assigning default search values to is open.

1 Double-click the control you want to set a relevancy value for. The Control Properties dialog box appears.

2 Click the **Relevancy** drop-down arrow. A list of relevancy values displays.

3 Select the desired relevancy value by clicking it.

4 Click the **OK** button.

Wizard Properties

Wizard properties settings are found in the Wizard Properties dialog. The Wizard Properties dialog contains several controls that allow you to manage your Wizard. To open the Wizard Properties dialog you must have a Wizard open in the View Portfolio.

WIZARD PROPERTIES

To open the Wizard properties dialog:

1 Click the **Wizard Properties** button on the Wizard toolbar.

A If you want to change the description of the Wizard, click in the Description field and type a new description.

B If you want to change the Wizard's category, select a different category from the Category drop-down menu or click in the Category field and type in a new category.

C The Availability Status checkboxes represent types of data you can view in Kinnexus, such as data entry, search result, and search criteria data. Select the data type you would like available for viewing

with the Wizard. For example, if you select the Search Wizard checkbox, the Wizard will be available for running searches.

D To set default search values for any of the fields on the Wizard, use the Default Value buttons. For a detailed description and set of instructions, see page XX.

E If you want to change the Wizard icon, click the Change Icon button and select a new icon. For a detailed description and set of instructions, see page XX.

Set default search values

Default search values allow you to set search criteria on a search Wizard behind the scenes. Perhaps you want the users of your Wizard to search active and contingent properties only. One way to keeps users from searching other statuses is to set the Status default search value. If you set the default Status search value as Active and Contingent, the Wizard will search active and contingent listings only—the user will not have the option of searching any other statuses.

Default search values can also help you save time. If you always search in the same city, or within the same price range, you can set default search values for these fields when creating your Wizard. By setting default search values, you don't have to take the time to enter these values on your Wizard every time you run a search.
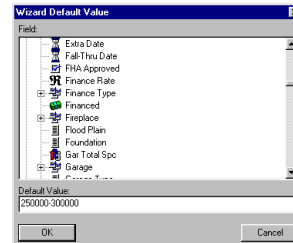
To set a default search value:

Note: These instructions assume that the Wizard you are assigning default search values to is open.

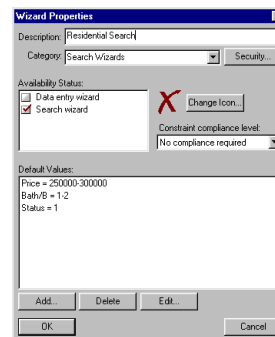**1** Click the **Wizard Properties** button on the toolbar.

2 At the bottom of the Wizard Properties dialog box, click the **Add** button to add a new default value. The Default Wizard Value dialog box appears.

3 Select the field you want to assign a default search value to from the Field window.

4 Click in the Default Value field and type the desired default value. See *Entering default search values for different data types* on this page for infor-

mation on how to enter default values in the Default Value field.

5 Click the **OK** button on the Wizard Default Value dialog box.

6 Click the **OK** button on the Wizard Properties dialog box.

Entering default search values for different data types

The following tables show you how to enter default values for different data types in the Default Value field.

Field	Sample default value	What happens
Acres	>5	Searches all listings with more than five acres.

Examples of default values for numbers

Field	Sample default value	What happens
Area	1, 3-7, >13	Searches areas 1,3,4,5,6,7, and all areas 13 and greater.
Price	100000-200000	Searches only the listings in the specified price range.

Examples of default values for numbers

Field	Sample default value	What happens
City	*Flint*, *Blanc*	Finds all listing that have 'Flint' or 'Blanc' anywhere in the text of the City value.
Remarks	*Fixer*, *TLC*	Finds all listings with *Fixer* or *TLC* in the remarks.

Examples of default values for text

Field	Sample default value	What happens
Lastmod	Current-3d	Searches only the listings that have been modified in the last three days.
Activation	Jan 1, 1999 -- Jan 31, 1999	Searches only the listings activated during January of 1999.

Examples of default values for dates

Field	Sample default value	What happens
Status	1	Searches only listings with the status value of 1.
Style	11	Searches only those listings whose style value is 11.

Examples of default values for lists

Change Wizard icon

When you create a Wizard, a default icon is assigned to it. Wherever you see the name of the Wizard, the icon is displayed with it. You can replace the default icon with the another graphic.

To change a Wizard icon:

These instructions assume that the Wizard whose icon you want to change is open.

1 Click the **Wizard Properties** button.

2 Click the **Change Icon** button.

3 In the Open dialog, select the desired file.

4 Click **Open**.

5 Click the Open **OK** button.

6 Click the Wizard Properties **OK** button.

Chapter 4

Expressions

Because your database contains a limited number of fields, you may find yourself wanting information that does not have a corresponding field in the database. For example, perhaps you are looking at a list of residential search results, and you want to know the price per bedroom for the properties in the view. If your database doesn't have a price per bedrooms field, how do you get that information? By using expressions. Expressions let you combine database fields and other expression components to create your own evaluations.

Using an expression, you can, for example, combine the Price field and the Bedrooms field to come up with a Price Per Bedrooms value. This expression value will display as an expression field, which looks very similar to the regular database fields on your view.

The difference between in database and expression fields is that expression fields are not stored in the database. You can save an expression only in the view in which it was created. If you create the Price Per Bedrooms field in a List View, and then change the view, you will have to create the expression all over again in the new view.

This section defines expressions and shows you how to create them. Expressions are useful only in Kinnexus views. You can create expressions for List, Report, Presentation, and/or Comparison views.
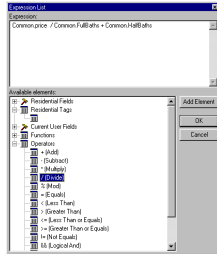
Creating expressions

With the exception of sort order expressions in Presentation views (see page XX), you must use an existing field on a view as a starting point for creating an expression. For example, to create a Price per square foot expression, you must have the Price or Square Feet field on the view. If neither field is on the view, you need to add one of the fields to the view from the Field Chooser.

Each field in the database is already an expression. What you want to do is change the existing expression so that it conveys a different value. To change a field's expression value, you need to find its Expression field. The Expression field contains the current expression. Once you change a database field's expression, that field ceases to be a database field, and becomes an expression field.

To change the expression in the Expression field, you can either click in the Expression field and type the desired expression terms directly into the Expressions field, or you can right-click the Expressions field and select the desired expression terms from the Available Elements tree. Expressions are read left to right.

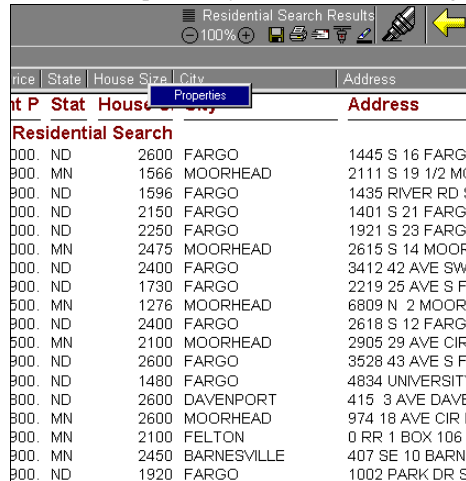Expression: | Common.listprice / common.soldprice) * 100 + "%"
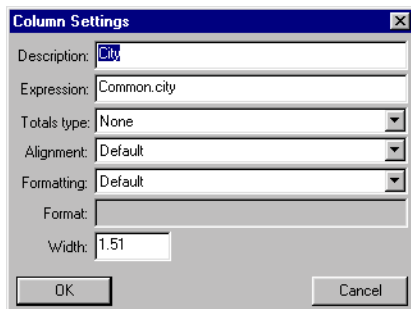
Expression field

Available Elements tree

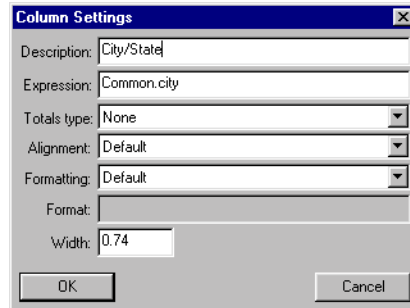**To create a List View field expression:**

7   Right-click the column header representing the field whose expression you would like to change.
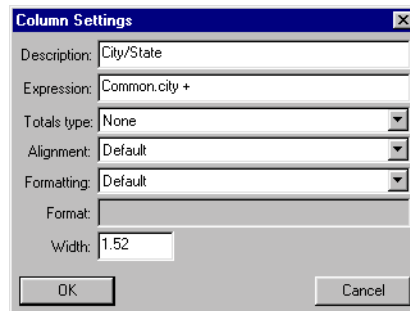

8   Select **Properties** from the right-click menu.

9   If desired, click in the **Description** field, and type a new name for the field.
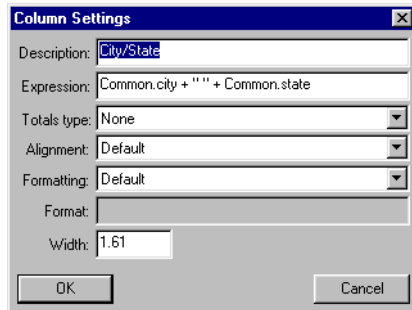

10 Do one of the following:

• Right-click the **Expressions** field and double-click the desired expression term in the Available Elements tree. The selected expression term appears at the beginning of the expression.

• Click in the **Expressions** field and type the desired expression term.

11 Repeat step 4 until the expression functions in the Expression field represent the desired expression value.

12 Make any necessary changes to the expression in the Expression field, such as adding parentheses, or adjusting term order.

13 Click **OK**.

To create a Comparison View field expression:

1 Right -click the row header representing the field whose expression you would like to change.

2 Select **Row Properties** from the right-click menu.

3 If desired, click in the **Description** field, and type a new name for the field.

4 Do one of the following:

• Right-click the **Expressions** field and double-click the desired expression term in the Available Elements tree. The selected expression term appears at the beginning of the expression.

• Click in the **Expressions** field and type the desired expression term.

5 Repeat step 4 until the expression terms in the Expression field represent the desired expression value.
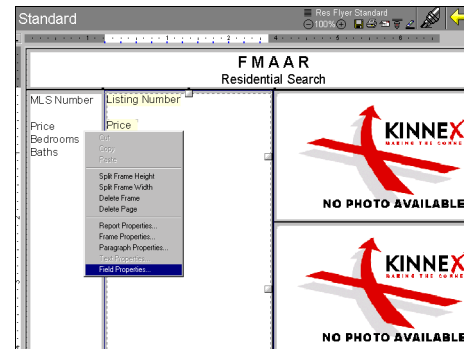
6 Make any necessary changes to the expression in the Expression field, such as adding parentheses, or adjusting term order.

7 Click **OK**.
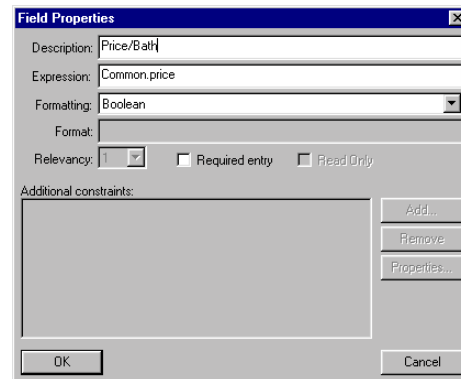
To create a Report field expression:

1 In the View Portfolio, open the view you want to create an expression for.

2 On the report, right click the field whose expression you would like to change.

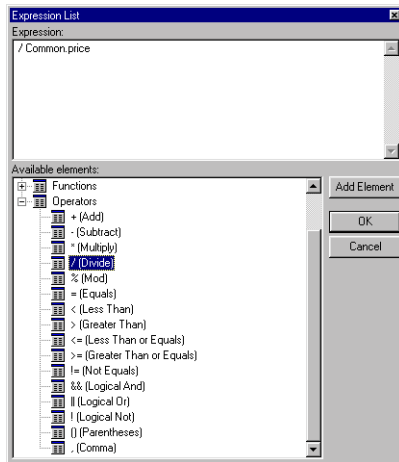**3** Select **Properties** from the right-click menu.

4 If desired, click in the **Description** field, and type a new name for the field.
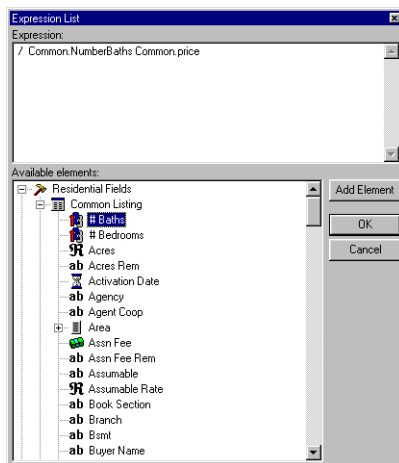

5 Do one of the following:

• Right-click the **Expressions** field and double-click the desired expression term in the Available

Elements tree. The selected expression term appears at the beginning of the expression.
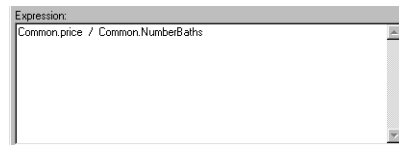

• Click in the **Expressions** field and type the desired expression term.

6   Repeat step 4 until the expression terms in the Expression field represent the desired expression value.

7   Make any necessary changes to the expression in the Expression field, such as adding parentheses, or adjusting term order.

8   Click **OK**.

To open the Presentation properties dialog:

For more detailed information about Presentation view expressions, see page XX.

1   In the Presentation view, right click the section view whose expression you would like to set.
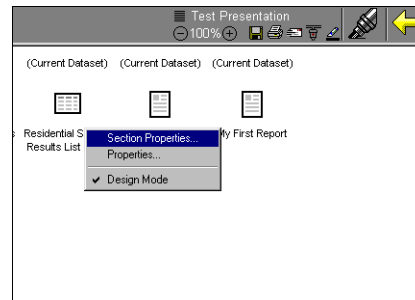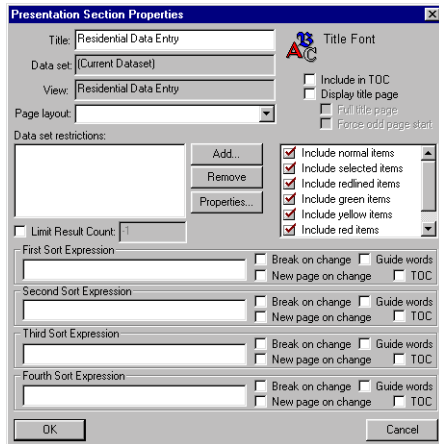

**2**   Select **Section Properties** from the right-click menu.

3   Do one of the following:

• Right-click the desired sort order expression field and double-click an expression term in the Available Elements tree.

• Click in the desired sort order expression field and type an expression term.

4   Repeat step 4 until the expression terms in the Expression field represent the desired expression value.
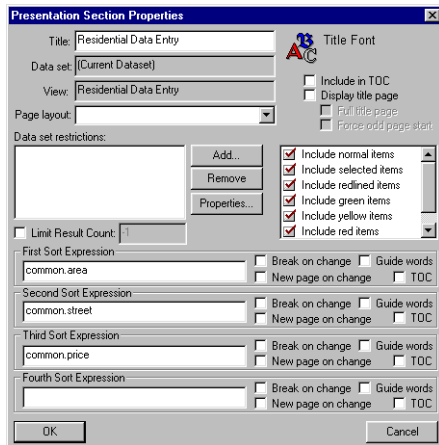
5   Click **OK**.

Putting expressions together

Expressions are very advanced and complicated features—if you are not already comfortable using them, creating effective expressions will probably require some practice. However, there are some things you can do to make learning expressions a little easier:

• Become familiar with the different expression components—what each component does by itself, and what it does when combined with other expression components. Expressions are nothing more than expression components strategically combined.

• Learn to recognize different data types. Kinnexus terms can be in text, integer, real, currency, Boolean, or date format. These formats are called data types.

• Become familiar with type conversion precedence. Type conversion precedence determines the data type of an expression's evaluation. Knowing the type conversion precedence guarantees that your evaluation results in the desired format.

• Make sure you know the order of operations. The order of operations determine in what order the expression is evaluated. A misplaced parenthesis can completely alter the outcome of an expression.

Expression components (terms and operators)

There are six components that you can use in creating new expressions: fields, constants, functions, tags, variables, and operators. Fields, tags, constants, and functions are called terms. Operators specify a logical or mathematical evaluation of one or two terms. Strategic combinations of these terms and operators result in powerful expressions. The following sections define each component and show you how to use each one in expressions.

Fields

You are already familiar with fields as they are used in views. City is a field. Listing Date is a field. You can add any existing field in the database to an expression. Field expression terms appear in the following format: *table.field*. For example, to include the current listing price of a property in your expression, you would add *common.currentprice*, drawing the current price value from the common table.

Expression: Common.city + Common.state
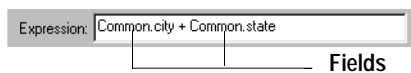
Fields

Tags

A tag lets you get data from a database field, even if you don't know the correct field name. For example, number of bedrooms is a popular residential field. However, the field containing the number of bedrooms value could be called Bedrooms, NumberBedrooms, or even #Bdrms in the database. To make finding the right field easier, your system administrator can create a Bedrooms tag. A Bedrooms tag lets you retrieve exactly the same data as the number of bedrooms field, but the tag has a very obvious name, so you don't have to search for the right field name. Essentially, tags provide aliases for commonly used fields with potentially confusing names. You can add any tag in the database to an expression.

Constants

A constant is a number or text string that doesn't depend on variable information. There are two kinds of constants: literal constants and numeric constants.

Literal constants

Literal constants must always be surrounded by quotation marks. The quotation marks let Kinnexus know to display what lies between them literally. An example of a literal constant is a symbol added to the end of a number. Perhaps you want a percent sign to appear after the selling agent commission field on a report you are creating. Let's say that in your database, the selling agent commission value is stored as *common.sac*. To insert a percent sign after the selling agent commission you add the SAC field to your report using the Field Chooser. You click in the SAC Expression field, placing the cursor directly after common.sac. You then type + *"%"* field so that *Common.sac + "%"* appears in the Expression field.

If you use this report to view a listing whose selling agent commission value is 12, the selling agent commission value appears on the report as 12%. If the listing you are viewing has a selling agent commission value of 7, the selling agent commission value appears as 7%. While the selling agent commission value is variable, meaning that the commission value changes depending on what property you are viewing, the percent sign remains constant, regardless of the actual selling agent commission value. The "%" is the constant in the expression.

Numeric constants

Numeric constants do not use quotation marks and can be mathematically combined with other terms. Suppose, for instance, you want to determine the percent of sale price to original list price for some listings. You would use this expression:

*(Common.listprice / common.soldprice) * 100*

The *100* is the constant in the expression. While the List price and Sold price change from listing to listing, the *100* remains the same. If the list price was

$275, 000 and the property sold for *$260,000*, you would get a value of *94.54*. If you wanted a percent sign to display after the value, you would use this expression:

Expression: | Common.listprice / common.soldprice) * 100 + "%"

Constants
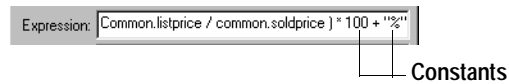
You would then get *94.54%*.

Functions

Functions are calculation tools that help you retrieve and manipulate data. Functions are used in data type conversion, string manipulation, date calculations, and other miscellaneous programs. For example, the @Money function lets you convert an integer expression value to a currency value. The @UpCase function lets you convert all the characters in a text string to uppercase.

All functions are distinguished by a @ symbol followed by parentheses. Within the function parentheses you place arguments to be evaluated by the function. Commas should always separate arguments within functions.

Expression:
@INTEGER(common.price

Function

A complete list of available functions, containing descriptions and examples, is available in *Appendix A*.

Operators

Expression operators specify a logical or mathematical evaluation to be performed on one or two terms. Among other things, operators let you add two terms together, divide two terms by each other, and determine which term of the two is the greater. For example, you could use the division operator to find the price per bedroom value:

Expression: | Common.price / Common.NumberBedrooms
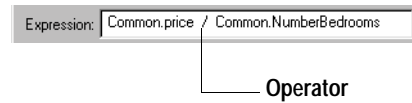
Operator

Order of operations

The following expressions have been applied to a 2 bathroom, $125,000 residential property:

Common.price*2/common.numberbathrooms+3 = $25,003
(Common.price*2)/common.numberbathrooms+3 = $250,000
Common.price*2/(common.numberbathrooms+3) = $83,333

Although each of the above expressions contain exactly the same terms and operators, each expression returns a different evaluation. The difference in the evaluations can be accounted for by the order of operations The order of operations determines in what order the terms in an expression are evaluated. Three different rules govern the order of operations:

First order of operations rule: Operator precedence determines the order in which terms are evaluated.

7+4*6=?

Which is the correct answer to the above expression, a or b?

a) 7 +4 = 11. 11*6 = 66.

b) 4*6=24. 24+7=31

In order to determine the correct answer, you need to know operator precedence. In any expression, the terms combined by the operator with the lowest operator precedence value are the first to be evaluated, the terms with the next lowest operator precedence value are the second to be evaluated, and so on. The operator precedence order is as follows:

Operator	Operator precedence value
*, /, %	1
+, -	2
==, >, < , <>, >=, <=	3
&&, ||	4

Operator precedence values

The correct answer to the above expression is b, *31* because according to the order of operations, multiplication and division (1) takes place first, then addition and subtraction (2).

Second order of operations rule: Terms in parentheses are evaluated first.

The second order of operations lets you use parentheses to override the first order of operations rule. If the example used above were written *(7+4)*6=?*, the correct answer would be *66*, because according to the order of operations, items in parentheses are evaluated first.

Third order of operations rule: If parentheses are enclosed in other parentheses, the enclosed terms are evaluated from the innermost parentheses to the outermost parentheses.

(3+(7- (2+3*6) +2*5)-7+1) = ?

The inner most parentheses contain the expression that must be evaluated first: *(2+3*6)=18+2=20*

Now the expression looks like this: *(3+(7-20+2*5)-7+1)*

The next set of parenthesis to be calculated is *(7-20+2*5) = 7-20+10=-13+10=-3*

The expression is now reduced to *(3-3-7+1) = -6*

Order of operations in Kinnexus expressions

The following Kinnexus expression illustrates the order of operations:

common.price/common.numberbedrooms +5

Apply this expression to a 4 bedroom, $125,000 residential property. According to the order of operations, multiplication and division take place before addition and subtraction. So first, *$125,000* is divided by *4*, giving you *$18,000*. Then *5* is added to this figure, giving you *$18,005*.

But perhaps you want to add the 5 to the number of bedrooms before the price is divided by the number of bedrooms. Although the first order of operations says that the division must take place first, you can use the second order of operations that says terms in parentheses are evaluated first. To add five to number of bedrooms before division takes place, you can place *common.numberbedrooms +5* in parentheses:

Common.price/(common.numberbedrooms+5)

Applied to the same 4 bedroom, $125,000 residential property, this expression first adds *4* and *5*, giving you *9*. *9* is then divided by *$125,000*, making the result *$10,500*.

Knowing and manipulating the order of operations greatly enhances the effectiveness of your expressions. If your expression evaluations are not what you think they should be, check the expression to make sure you have set up the order of operations correctly. One misplaced parenthesis can change the outcome of an expression.

Data Types

Open the Field Chooser and look at the small icons next to each field. The icons represent data types. An *ab* icon next to a field means that field has a text data type. A 123 icon represents an integer data type. Every term in an expression has a data type, whether it is a database field, or a constant text string. A term's behavior depends on its data type, but also depends on what other data types are present in the expression. A currency term behaves differently when combined with a text term than it does when combined with an integer term. Recognizing different data types helps you decide how to combine terms of different data types in an expression.

Data type	Field Chooser icon	Definition
Text	**ab**	Any text string
Currency		Numbers with currency symbols and decimal points

Expression term data types

Data type	Field Chooser icon	Definition
Boolean		A true/false statement
Boolean Group		A list of true/false statements
Integer		Any number except for decimals
Real	R	Decimal numbers (excluding currency)

Expression term data types

Type conversion

In order for an expression to make an evaluation, all constants and fields within an expression must be of one data type, i.e., all constants and fields in an expression must be Boolean, or all constants and fields in an expression must be integers, etc. If you have constants or fields of different data types in an expression, a default type conversion will take place when you evaluate the expression. For example, if you add a text string to an integer in an expression field and click the OK button, Kinnexus converts the entire expression, including the integer term, to a text value. The data type precedence order is as follows:

Data type	Data type conversion precedence value
Text	1
Currency	2

Data type conversion precedence

Data type	Data type conversion precedence value
Real	3
Integer	4
Boolean	5

Data type conversion precedence

In any expression, the term with the lowest precedence number is the default conversion data type. Say you have an expression containing a currency term (2) and an integer term (4). Currency has the lowest precedence number, so the entire expression will convert to a currency value when the expression is evaluated.

Note: A type conversion function overrides all precedence order. See page XX for more information about type conversion functions.

Useful expressions

This section shows you how to combine terms and operators to create some useful expressions. Going through the process of creating these expressions will give you a good idea of how terms and operators are combined to create expressions. Once you become comfortable combining expression components, you can begin creating your own expressions.

The field names used in these examples may not be the same as those used in your database, but you should be able to adapt these examples to your database field names easily.
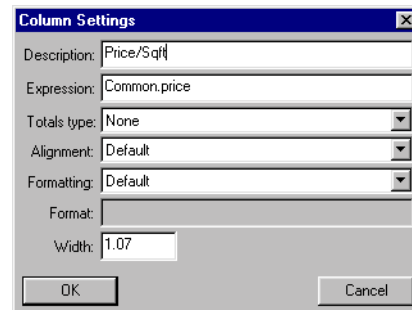
Price per Square Foot

This expression returns the price per square foot value. In order to get this value, the expression must divide the square feet by the price. This means that you will use two field names—the Price field and the Square Feet field—and one operator for division.

To create a price per square feet expression

These instructions assume you are in a List View, Comparison View, or Report View that contains some data.

1 If the Price field is not already on the view, add it from the Field Chooser.

2 Open the Price field's settings dialog (see page XX).

3 If desired, click in the **Description** field and type a new description.

Column Settings

Description: Price/Sqft
Expression: Common.price
Totals type: None
Alignment: Default
Formatting: Default
Format:
Width: 1.07

OK   Cancel

4 Place the cursor at the end of the expression in the Expression field.

5   Type the division operator.

Column Settings

Description:	Price/Sqft
Expression:	Common.price/
Totals type:	None
Alignment:	Default
Formatting:	Default
Format:	
Width:	1.07

OK   Cancel

6   Type the square feet field name.

Column Settings

Description:	Price/Sqft
Expression:	Common.price/common.sqft
Totals type:	None
Alignment:	Default
Formatting:	Default
Format:	
Width:	1.07

OK   Cancel

7   Click **OK** button.

Price per square foot variation

According to type conversion precedence, the value returned by the price per square foot expression was in currency format. Using a type conversion function, you can change the price per square foot value to another data type. For instance, you can use the @integer function to convert the value to an integer.

To convert the price per square foot value to an integer:

1   Complete the *To create a price per square feet expression* instructions on page XX through step 6.

2   Place the cursor at the beginning of the expression in the **Expression** field.

3   Type **@integer**.

Column Settings

Description:	Price/Sqft
Expression:	@integerCommon.price/common.sqft
Totals type:	None
Alignment:	Default
Formatting:	Default
Format:	
Width:	1.07

OK   Cancel

4   Place parentheses around the rest of the expression.

Column Settings

Description:	Price/Sqft
Expression:	@integer(Common.price/common.sqft)
Totals type:	None
Alignment:	Default
Formatting:	Default
Format:	
Width:	1.07

OK   Cancel

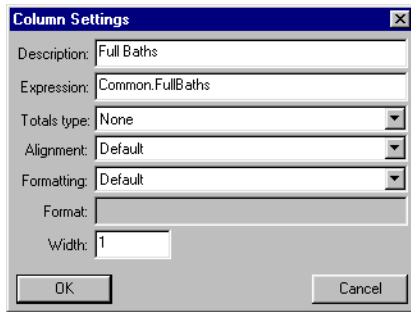**5**   Click **OK**.

Price per bathroom

This expression returns the price per bathroom. If your database has a bathrooms field, then the steps for creating price per bathrooms expression are almost identical to the price per square foot expression. You simply divide the number of bathrooms field by the price field. In many databases, however, bathrooms are separated into full and half bathrooms, or upper level and main level bathrooms.

This example will show you how to add bathrooms fields to get a total bathrooms field, which you can then divide by the price.
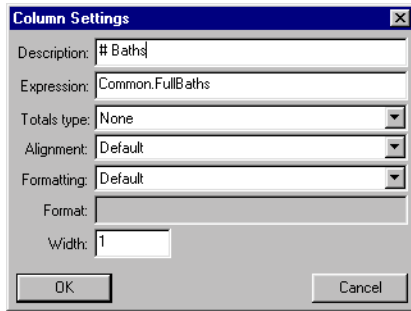
To create a total bathrooms expression

These instructions assume you are in a List View, Comparison View, or Report View that contains some data. This example uses fields from a database that places bathrooms into half and full bathrooms fields.

1 If the **Full Bathrooms** field is not already on the view, add it.

2 Open the Full Bathrooms field settings dialog. (See page XX).

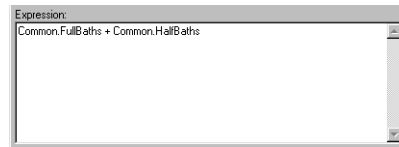**3** If desired, click in the **Description** field and type a description.

4 Right-click the **Expression** field.

5 Place the cursor at the end of the expression and type the addition operator.


6 Type the Half bathrooms field name.

7 Click **OK**.

To create a Price per bathrooms expression

1 Complete the *To create a price per bathrooms expression* instructions on page XX through step 6.

2 Place the cursor at the beginning of the expression in the **Expression** field.

3 In the Availabe Elements tree, double-click the price field name.
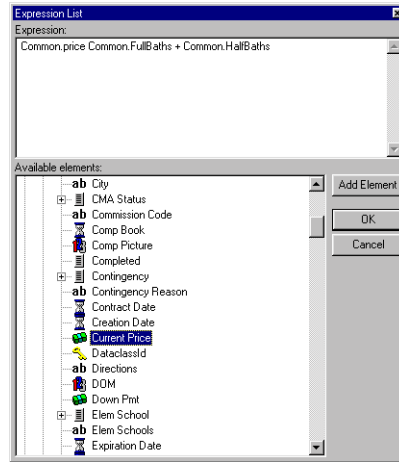
4 Double-click the division operator.
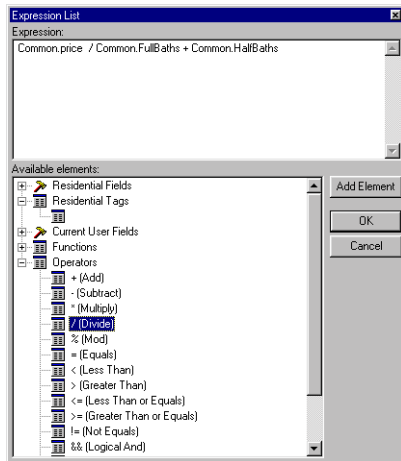
5 Place parentheses around both bathrooms fields.
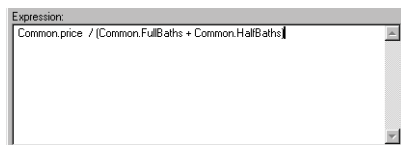
6 Click **OK**.

Address

In most databases, the address of a property is rarely in one field. Usually each address component, such as street number, street name, city, and zip code, is a separate field in the data base. This example shows you how to combine address component fields into one field containing a complete address.

To create an address field:

These instructions assume you are in a List View, Comparison View, or Report View that contains some data.

1 If the Street Number field is not already on the view, add it.
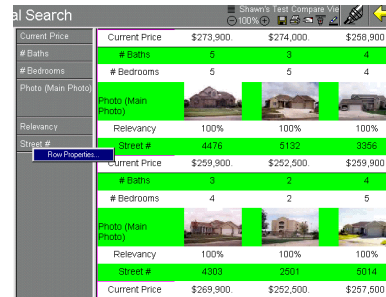
2 Open the Street Number field settings dialog.

3 If desired, click in the **Description** field and type a new description.
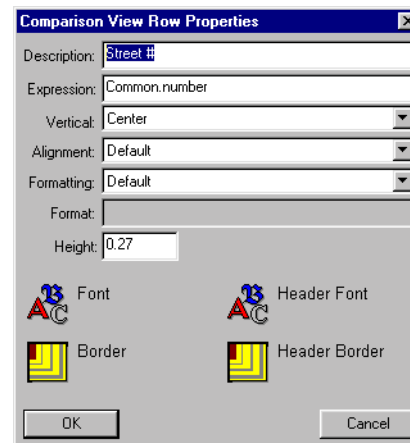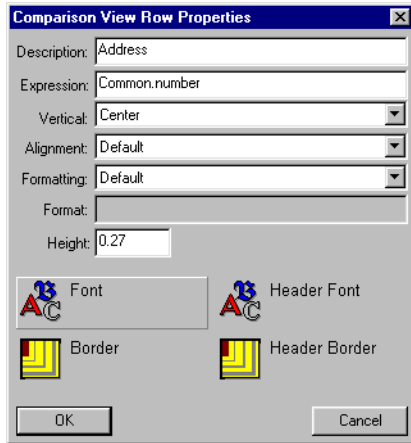

4 Right-click the **Expression** field.

5 Double-click the addition operator in the Available Elements field.

6 Type a set of quotation marks containing an empty space. (This will place a space between the street number and the street name.)

7 Double-click the Street Name field in the Available Elements field.

8 Double-click the addition operator in the Available Elements field.

9 Type a set of quotation marks containing an empty space.

10 Double-click the City field in the Available Elements field.

11 Click **OK**.

Address field

Days on market

This example shows you how to use the @Datediff function to get information about how many days a withdrawn or expired listing was on the market. In order to get this information, you will use a function,

a date format constant, and two fields. Terms within the function are separated by commas.

To create a withdrawn or expired date difference expression:

These instructions assume you are in a List View, Comparison View, or Report View that contains some data.

1 If the Last Modified field is not already on the view, add it.

2 Open the Last Modified field settings dialog.

3 Click in the **Description** field and type a new field name.

4 Right-click in the **Expression** field.

5 In the **Expression** pop-up window, double-click the **@DataDiff** function.
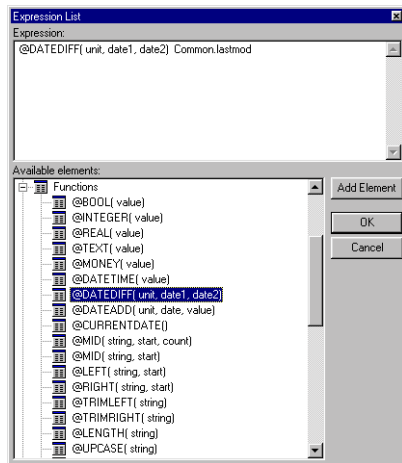
6 Delete everything between the @datediff parentheses.

7 Between the function parentheses, type the datepart that calculates the date difference in days between quotation marks.
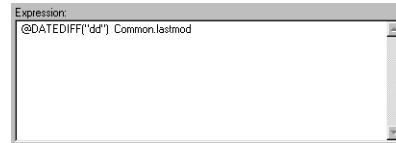
8 Type a comma.

9 Move the Last Modified Date field name into the parentheses following the datepart comma.
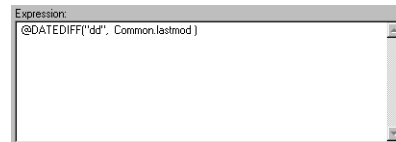
10 Type a comma.

11 Double-click the List Date field name in the Available Elements field.

12 Click **OK**.

Days on market variation

The expression above returned the days on market value for expired and withdrawn listings. You would have used a different expression to get days on market for a sold listing, and yet another expression to get days on market for an active listing, because each status requires a different days on market expression. To create an expression that can find out the status of each listing in a view and evaluate the days on market for each one regardless of status, you can use the @Case function. The @Case days on market expression is long, and looks like this:

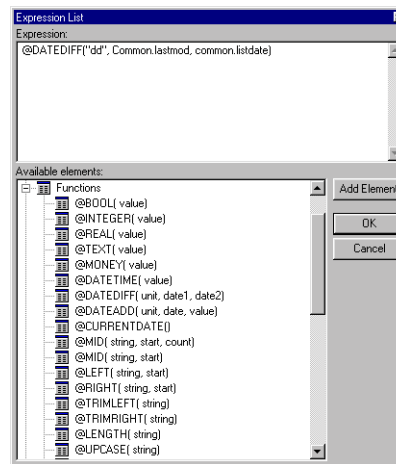*@case(common.status, 0, @datediff (dd, @current-date, common.listdate), @datediff (dd, @current-date, common.listdate), @datediff (dd, common.contractdate, common.listdate), @datediff (dd, common.contractdate, common.listdate), @datediff (dd, common.solddate, common.listdate), @datediff (dd, common.lastmod, common.listdate), @datediff (dd, common.lastmod, common.listdate))*

This expression contains the status field (common.status), which determines the status of each listing. The expression also contains the days on market expression for each status. Each days on market expression must be placed in the expression according to its status value.

Each status is assigned a value. If a listing is Contingent, and the contingent status has a value of 3, the contingent expression will hold the number three position in the @case function. For example, if the @case function ascertains that the first listing in a view is contingent, it uses the expression in the number three position and returns the days on market for that listing. If the next listing in a view is Active (active has a status value of 1), the function ascer-

tains that the listing is active and uses the expression in the number 1 position and returns the days on market for that listing.

The following table shows you the different statuses, their associated values and the days on market expression for each status. Your board may use different status values than those used in the table. Your system administrator can provide you with a list of your board's status values.

Status	Status value	Days on Market expression
Pre-active	0	0
Active	1	@datediff (dd, @currentdate, common.listdate)
Hold	2	@datediff (dd, @currentdate, common.listdate)
Contingent	3	@datediff (dd, common.contractdate, common.listdate)
Pending	4	@datediff (dd, common.contractdate, common.listdate)
Sold	5	@datediff (dd, common.solddate, common.listdate)
Expired	6	@datediff (dd, common.lastmod, common.listdate)
Withdrawn	7	@datediff (dd, common.lastmod, common.listdate)

Status values and Days on Market expressions

To create an all-status Days on Market field:

1   If the Last Modified field is not already on the view, add it.

2   Open the Last Modified field settings dialog.

3 If desired, click in the **Description** field and type a new description.

4   Delete the expression in the Expression field.

5   Right-click the Expression field.

6   Select the **@case** function from the Expressions
window.
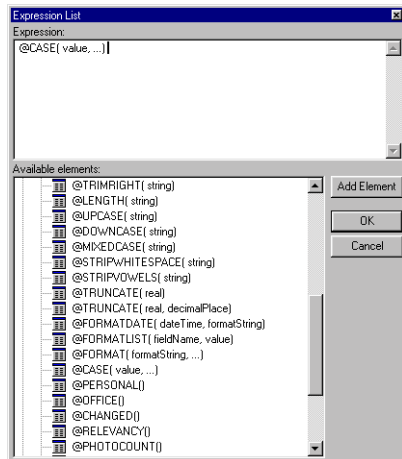
7   Between the @case function parentheses, type
the Status field name followed by a comma.

8   Following the status field name and comma,
enter the **@datediff** functions for each status.

9   Click **OK**.

Chapter 5

Listings

This chapter will overview the functions associated with adding and updating listings. You have a great deal of control over your listings, but, as with everything else in Kinnexus, the ability to edit and maintain listings is governed b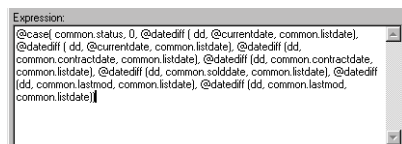y rights granted by your system administrator. You will be able to perform certain functions described in this section only if the system administrator has granted you permission.

This chapter shows you how to:

• Open and view your listing portfolios

• Add listings

• Add photos to listings

• Enter information about your listings on data entry pages

Listing portfolios

Your listings are contained in listing portfolios. There are three different portfolios and each portfolio contains a different listing type. Simply double-click a listing in a listing Portfolio to open it. The following table cotains a brief description of each listing portfolio and the kinds of listings each contains.

Portfolio	What it contains
	The Listing Portfolio contains your active, contingent, on hold, pending, and pre-active listings. In other words, the Listing Portfolio contains your current inventory.

Listing Portfolios

	The Sold Listing Portfolio contains the sold listings for which you were the listing agent. The Sold Listing Portfolio does not contain the listings for which you were the selling agent.
	The Lost Listing Portfolio contains the once-active listings that didn't sell. The listings in this portfolio include expired, withdrawn or deleted listings.

Listing Portfolios

To open a Listing Portfolio:

1   Click the Listing tray tab.

2   In the Listing tray, click the icon representing the portfolio you want to open.

Adding listings

There are three major steps to adding a listing. First, you enter some basic information about the listing in a listing Wizard. Second, you enter more detailed information about the listing on a data entry page. Third, you assign the listing a status.

Entering detailed information about a listing is advantageous to you as the listing agent, because the more information you enter about a listing, the more likely that listing is to appear in searches.

To add a listing:

3   Click the **Listing** tray tab.

4   Click the **Create Listing** icon. The listing Wizard appears.

5 Click the desired property type in the Type window.

6 In the Owner window is a list of people for whom you can add listings. Click the name of the person for whom you are adding the listing.

7 After designating the property type and the listing agent, click the **Next** button.

8 Subsequent listing Wizard pages are completely customized by your system administrator. Enter information for all of the fields you can. You can navigate between fields by using the TAB key.

9 When you have entered all the information for one Wizard page, click the **Next** button to go proceed to the next Wizard page.

10 Click the **Exit to Form** button when you have entered in all the desired information. A data entry page appears.

11 Enter listing information in the data entry page fields. See *Data entry pages* on page XX for more information about data entry pages.
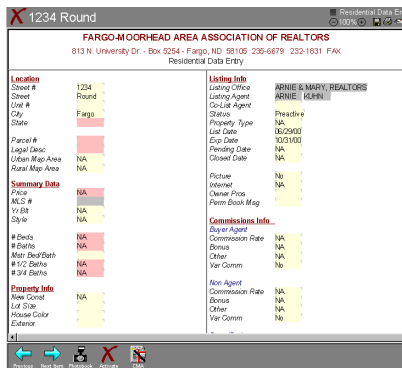
12 When you are through entering data, click the Save button on the Action Bar.

13 If you wish to make the listing active, click the Activate Listing button on the Next Step Bar. See Statuses on page XX for more information about listing statuses.

Editing listings

1 Click the **Listing** tab.

2 Click the icon representing the portfolio containing the listing you want to edit.

3 Double-click the listing you want to edit.

4 Make listing changes using the data entry page. See page XX for instructions on using a data entry page.

Deleting listings

Your system administrator determines whether or not you can delete listings. If the system administrator grants you the right to delete listings, a Delete button will appear on the Next Step Bar of the listing.

To delete a listing:

1 Click the **Listing** tab.

2 Click the icon representing the portfolio containing the listing you want to delete.

3 Double-click the listing you want to delete.

4 Click the Delete button the Next Step Bar.

Statuses

You must assign each listing a status. Until you assign a listing a status, the listing has a status of Pre-Active. There are eight default statuses in Kinnexus. Your administrator . The following table contains descriptions of each default status. Because system administrators can add or remove statuses

according to the needs of your board, this list may not coincide exactly with the statuses in your board:

Status	Description
Pre Active	Not on the market. Only your own searches will match your pre-active listings.
Active	On the market. Searchable.
Contingent	Under contract, but still accepting other offers. Searchable.
Hold	Temporarily off market. Mark a listing on hold when you are unable to show a property temporarily for whatever reason. Searchable.
Pending	Under contract and not accepting other offers. Searchable.
Sold	Closed listings. Searchable.
Expired	Expired listings. Searchable.
Withdrawn	Listings that were taken off the market before the expiration date. Searchable.

Listing statuses

To assign a status to a listing:

1   Click the Listing tray tab.

2   Click the Listing Portfolio.

3   Open the listing whose status you want to change.

4   On the Next Step Bar, click the icon representing the status you want to apply to the listing.
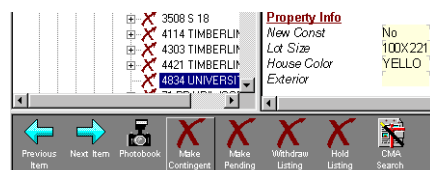
Listing photos

Kinnexus allows you to add photos to your listings. Kinnexus can read most photo formats, such as jpeg., bmp., gif., and others. Your system administrator has determined the number of photos you can add for each listing. In order to add a photo to a listing, you must have the photo saved as a file.

Kinnexus displays the actual size of photos as long as they are not larger than your screen. If a photo's actual size is larger than the size of your screen, Kinnexus will make the photo smaller so that the entire photo will fit on your screen.

Picture Information dialog

Each listing has a certain number of fields available for photos. In the Picture Information dialog, you can assign photos to each of the available photo fields. These fields are usually descriptively named, for instance, Exterior 1 and Interior 2 are examples of some of the photo fields you could have available. Once a photo has been assigned to a photo field, any time you add that photo field to a view, the assigned photo will display.

To open the Picture Information dialog:

1   Click the Listing tray tab.

2   Click the Listing Portfolio.

3   Double-click the listing whose photo(s) you want to manage.

4   Click the Photobook button on the Next Step Bar.

PICTURE INFORMATION DIALOG

A Click the **Open** button to add a photo to the selected photo field. See To add a photo a photo to a listing on page XX for detailed instructions.

B Click the **Save** button to save any changes you have made to the photos in the Picture Information dialog.

C Click the **Zoom In** button to view the actual size of the photo in the selected photo field.

D Select the **Photo** field you want to add, edit, or remove a photo from.

E Click the **Print** button to print all the photo fields in the Photo Information dialog.

F Click the **Delete** button to delete the photo in the selected photo field.

To add a photo to a listing:

These instructions assume that the Picture Information dialog is open.

1   Click the **Photobook** button on the Next Step Bar. The Picture Information dialog appears.

2   Click the photo field you want to add a photo to.

3   Click the **Open** button at the top left of the Picture Information dialog box. An Open dialog box appears.

4   Use the Open dialog box to select the photo file.

5   Once you have selected the desired photo file, click the **Open** button.

6   Repeat steps 5-8 for each additional photo you want to add.

Data entry pages

Data entry pages contain fields into which you enter further information about your listings. This section will show you how to enter data into fields on data entry pages. You will also learn about the different field and data types you will encounter on data entry pages.

Date entry page

Entering data

To enter data in a data entry field, you can either click in the top-right corner of a field, or use the TAB key to tab through the fields. TAB takes you to the next field. SHIFT+TAB takes you to the previous field.

To enter data:

1 Click in the top right corner of the Data Entry field.

2 Enter data for the field.

3 Press the **TAB** key to go to the next field. Continue entering data for each field until all the required/desired fields have been entered. You can skip over fields by pressing the TAB key.

To save changes:

1 Click **File>Save** or click the Save button on the Action Bar.

To edit data:

1 Open the data entry page containing the information you want to edit.

2 Scroll through the data entry page until you find the field you want to edit.

3 Click in the field. Any information already in the field will highlight.

4 Enter the desired data. Any previously information will be deleted and the new information will display in the field.

5 To save changes to the listing, click **File>Save** or the **Save** button on the Action Bar.

Field types

There are three different field types on the data entry page:

Optional fields   You can choose to enter data in an optional field, or choose to leave the field blank. Whether or not you enter data in an optional field is at your discretion. Optional fields are yellow by default.

Error Fields   All error fields have constraints placed on them. Before you can make a listing active, all error field constraints must be met. For example, the Date Sold field could have a constraint specifying that the date in the Date Sold field must not be earlier than the Listing Date. To view the constraints placed on an error field, hould the cursor over the error field. A tool tip will appear informing
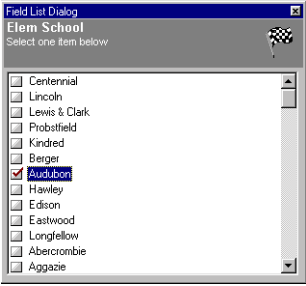
you of the constraints placed on the field. Required fields have red backgrounds by default.

Warning fields Warning fields also have constraints placed on them, but you are not required to meet the constraints before activating the listing. An example of a warning field might be the Bathrooms field. The system administrator might assign a range of bathrooms, say 1-10, to the bathrooms field. This way, if you accidentally type 74 in the Bathrooms field, you will receive a warning. You are not required to change the information you typed in (maybe the property really does have 74 bathrooms)

but the warning will prevent you from making unwitting mistakes in your data entry. Warning fields are blue by default.

Data types

Each field on the data entry page accepts only one kind of data. Knowing and recognizing each type of data will help you verify accurate data and make data entry easy. The following are the different types of data you can enter on a data entry form:

Data Type	Description	Example
Boolean	Checkboxes that allow you to specify 'Yes' or 'No'. A checkmark in a checkbox means Yes. An empty checkbox means No.	
Currency	Edit fields that accept numbers with currency symbols and decimal points.	Price $2,500,000.
Date	Edit fields that accept date values.	Listing Date 7/21/00
Date Time	Edit fields that accept both date and time values only.	Expiration Date 06/02/99 16:30
Integer	Edit fields that accept any number that does not contain decimals.	Unit # 21

Data entry page data types

Real (2 decimal)	Edit fields that accept decimal numbers with up to two decimal spaces.	Commission Rate 5.12
Real (4 decimal)	Edit fields that accept decimal numbers with up to four decimal spaces.	Other 12.0000
String	Edit controls that accept text values.	Listing Office EDINA REALTY
Percentage	Edit controls that accept percent values.	BAC 12%

Data entry page data types

Chapter 6

Comparative Market Analyses (CMAs)

Creating a CMA in Kinnexus involves three major steps. During the first step, you create the subject property if the property does not already exist as a listing. On the second step, you run a search for properties comparable to the subject property. The third step lets you present your results in an attractive, easy-to-read CMA presentation. These steps must be done in sequence, but they don't have to be completed in one Kinnexus session. For example, you could create the CMA subject property in one session, and run the CMA search during a later session.

CMA searches and presentations are saved with the subject property they are associated with in the CMA Portfolio on the Listing tray. If you delete a CMA subject property from the CMA Portfolio, the associated search and presentation are also deleted.

Creating a new subject property

The subject property is the property for which you are doing the CMA. You can either use an existing listing as the subject property, or you can create a new subject property. Creating a new subject property is very similar to adding a new listing. First you enter some information about the subject property on a Wizard page. You then fill out more informa-

tion about the property on a criteria page. Finally, you save the subject property in your CMA portfolio. If you are using an existing listing as your subject property, skip to *Running a CMA search* on page XX. To create a new CMA subject property, follow the steps below:

To create a new CMA subject property:

6   Click the **Listing** tray tab.

7   Open the CMA Wizard by clicking the **Create CMA** icon.

8   Fill out the Wizard criteria fields with information about the subject property.

9 When you have filled out the desired criteria fields, open the criteria page by clicking the **Exit to Form** button.

10 Enter any additional information about the subject property on the criteria page.

11 Click the **Save** button on the Action Bar. The CMA subject property is saved in your CMA Portfolio in the Listing tab.

Running a CMA search

Once you have created the CMA subject property, you are ready to search for similar properties. Kinnexus brings up a search Wizard containing criteria based on the information you entered about the subject property. For example, if the price you entered for the CMA subject property was $250,000, the Wizard Price field might have a price range of $200,000 to $300,000. You are free to edit any of the Wizard criteria if the ranges are too wide or narrow for your purposes.

Running a CMA search brings up a list of properties that are comparable to the CMA subject property. These properties are called *comparables*.

Because of the similarities between CMA subject properties and regular listings, you can also run a CMA search from any of the listings in your listing portfolio.

To run a CMA search from a CMA subject property:

These instructions assume that you have created and saved the subject property for which you are running the CMA search.

1 Click the **Listing** tray tab.

2 Click the **CMA Listing Portfolio** icon.

3 Open the CMA subject property you want to run a CMA search for by double-clicking it.

4 Click the **CMA Search** button on the Next Step Bar of the open CMA subject property. A Wizard containing criteria based on the criteria you entered for the subject property opens.

5 If desired, modify and/or add criteria to the search Wizard. CMA searches use relevancy. If you are unfamiliar with relevancy, see page XX.

6 When you are ready to run the CMA search, click the **Go** button on the Wizard. A list of comparables displays. The search criteria you used and the resulting comparables are saved with the CMA subject property in the CMA portfolio.

To run a CMA search from a listing

These instructions assume that there is at least one listing in your Listing Portfolio.

1 Click the **Listing** tab.

1 **Click the Listing Portfolio icon.**

2 Open the listing you want to run a CMA search for by double-clicking it.

3 Click the **CMA Search** icon on the Next Step Bar of the open listing. A Wizard containing criteria based on the criteria you entered when you created the listing opens.

4 If desired, modify and/or add criteria to the search Wizard. CMA searches use relevancy. If you are unfamiliar with relevancy, see chapter XX.

5 When you are ready to run the CMA search, click the **Go** button on the Wizard. A list of comparables displays. The search criteria you used and the resulting comparables are saved with the listing property in the Listing portfolio.

Presenting CMA results

From the list of comparables you can decide which properties you want to use in your CMA presentation. You can also choose any available view for your CMA presentation, but Kinnexus comes with a default CMA Presentation View you can use. The instructions in this section will show you how to use the default Kinnexus CMA Presentation.

If you do not want to use the Kinnexus CMA Presentation, see Chapter XX for information about applying other views or creating your own views. You can also modify the Kinnexus CMA Presenta-

tion by making a copy of the view and saving it under a different name in your View Portfolio.

The default CMA presentation is tailored for CMAs, but can also be used to view any set of search results in Kinnexus.

The Kinnexus CMA Presentation contains the following items by default:

• A title page template containing the title of the presentation

• A table of contents template containing a table of contents for the presentation

• A subject property page containing information about the CMA subject property

• A CMA search criteria page containing the search criteria used to find the comparables included in the presentation

• An Active comparables comparison view

• A Sold comparables comparison view

• An Expired comparables comparison view

To apply the Kinnexus CMA Presentation to a CMA subject property:

These instructions assume that you have already created and saved the subject property for which you are creating a CMA presentation. You must also have run a CMA search for the subject property.

1 Click the **Listing** tab.

2 Click the portfolio (CMA Portfolio or Listing Portfolio) that contains the CMA subject property you want to create a presentation for.

3 Open the CMA subject property you want to create a presentation for by double-clicking it.

4 Do one of the following:

• If you want to use the comparables from your original CMA search in the presentation, click the CMA Comparables icon on the Next Step bar. The original CMA search results display.

• If you want to modify the CMA search criteria, bring up the search Wizard by clicking the CMA Search icon on the Next Step Bar. When you have entered criteria and run the search, a list of comparables meeting the modified search criteria displays.

5   From the list of comparables, highlight in yellow the properties you want to include in the CMA presentation. If you don't know how to highlight items, see page XX.

6   To open the CMA presentation click the CMA Presentation icon on the Next Step Bar. When the presentation first opens, a dialog may appear asking you enter some additional information about the presentation. Fill out all the information that you can. The Kinnexus CMA Presentation you have just opened is saved with the subject property in the CMA or Listing Portfolio.

7   To preview how the CMA presentation will look when printed, click the View Mode button and select Print Preview Mode from the pop-up menu.

8   To print the Kinnexus CMA Presentation, click **File>Print** or click the **Print** button on the Action Bar.

To apply the Kinnexus CMA Presentation to search results:

These instructions assume that a list of search results is open in the main view.

1   Click the **Current Form Indicator**.

2   Select the Kinnexus CMA Presentation from the pop-up menu.

Chapter 7

Maps

This chapter describes how to use Kinnexus mapping functionality in searches and forms. Using the Tiger data mapping information provided in Kinnexus, you can:

- Search by geographic area
- Locate List View properties on an overview map
- Add a map to a form
- Reposition mapped properties on a form

The Mapping Information dialog

Whether you are defining a search region or locating properties on the overview map, you will use the Mapping Information dialog. The Mapping Information dialog contains all the controls and features necessary for using maps in searches and forms.

To open the Mapping Information dialog:

1   Do one of the following:

- Click a map in a Search Wizard.
- Click the Overview Map button on a List View of search results. A map will appear.

- Click the map in a data entry form.
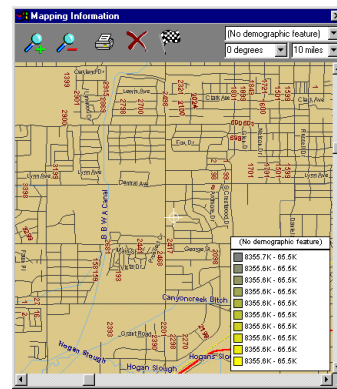
Mapping Information dialog

Mapping dialog buttons

Several buttons appear along the top of the dialog. The following table contains a description of each button.

Button	What it looks like	What it does
Zoom Out		Click this button to zoom out on the map.

Mapping dialog buttons

Zoom In		Click this button to zoom in on the map.
Print		Click this button to print the map.
Clear		Click this button to clear all selected areas on the map.
Finish		Click this button when you have completed any changes made to the map.
Relevancy (search maps only)		Click this button to assign a relevancy level to your map criteria. This button appears only if you are using relevancy with the current search.

Mapping dialog buttons

Demographic mapping features

You can have Kinnexus maps display demographic information, such as household concentration, population density, and property price. Demographic mapping features are represented by colors on the map. A demographic feature key at the top right of the Mapping Information dialog shows you what each color means.

To view a demographic feature in a map, select the desired feature from the drop-down menu on the Mapping dialog.

To select a demographic mapping feature:

These instructions assume that the Mapping Information dialog is open.

1 Click the demographic feature drop-down arrow.

2 Select the desired demographic feature from the drop-down menu.
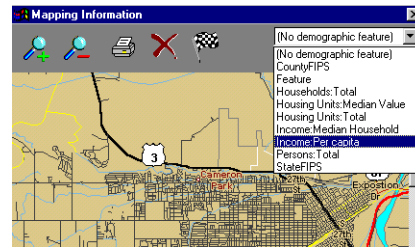
Rotation

You can rotate all map types by degrees, with 0 being true north. You can either select a rotation degree from the Rotation drop-down menu, or type a rotation degree directly in the Rotation field.

To set map rotation:

These instructions assume that the Mapping Information dialog is open.

1 Do one of the following:

• Click the Rotation drop-down arrow and select a rotation from the drop-down menu.
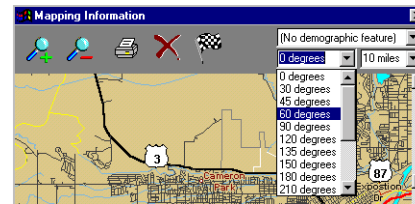
• Click in the Rotation field and type the desired rotation.

Zoom

Aside from using the zoom buttons to zoom in and out on maps, you can also set the zoom by entering a value in the Zoom field. Zoom is measured in miles across.

To set default zoom:

These instructions assume that the Mapping Information dialog is open.

1   Do one of the following:

• Click the **Zoom** drop-down arrow under the desired map type and select the desired zoom from the drop-down menu.

• Click in the **Zoom** field under the desired map type and enter the desired zoom.

Zoom field
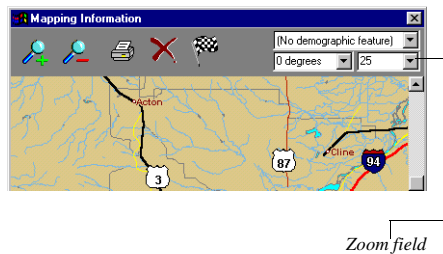
Mapping Information right-click features

The Mapping Information right-click menu contains several commands that enhance the mapping process.

To view the mapping right-click menu:

These instructions assume that the Mapping Information dialog is open.

1   Click in the Mapping Information dialog with the right mouse button.
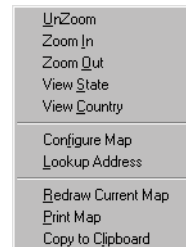
The mapping right-click menu contains the following options:

• **UnZoom**   Undoes your last zoom.

• **Zoom In**   Zooms in on the location you right-clicked.

• **Zoom Out**   Zooms out on the location you right-clicked.

• **View State**   Redraws the map so that the current state and its counties are outlined.

• **View Country**   Changes the map to an over-view of the United States of America.

• **Configure Map**   Brings up a dialog allowing you turn on and off certain map features. For example, if you do not want highways or airports to appear on your map, you can specify that preference in Configure Map dialog. The settings you enter into the Configure Map dialog applies to the current map only and will not be saved.

• **Look Up Address**   Brings up a dialog allowing you to type in any address in the United States. When you click the OK button, the address you typed in will be displayed on the map.

• **Redraw current map**   Redraws the current map.

• **Print Map**   Prints the current map.

• **Copy to Clipboard**   Copies the current map to the clipboard, allowing you to paste the map into other applications.

Re-sizing the Mapping Information dialog

You may want to resize the mapping Information dialog to make it bigger or smaller.

To resize the Mapping Information dialog:

These instructions assume that the Mapping Information dialog is open.

1 Place your mouse pointer over any edge of the Mapping Information dialog. Notice that your mouse pointer changes from a white arrow to a black double-pointed arrow.

2 When you see the double-pointed arrow, hold down the left mouse button and drag the mouse to the right or left. Depending on where you move your mouse, the dialog will become larger or smaller.

3 When the Mapping Information dialog is the size you want it to be, release the mouse button.

Using mapping to define a search region

To define a search region, you will select a map region on the search Wizard. When you run the search, only those properties that are within the map region you selected, and meet any other criteria you entered on the Wizard, will be returned.

To define a search region using mapping:

These instructions assume you are using a Wizard with mapping functionality.

1 Open a search Wizard.

2 As you go through the Wizard pages, select any search criteria, such as Status and Price, you wish to combine with mapping criteria.

3 When you come to the Wizard page containing a map, click the map. The Mapping Information dialog appears.

4 To select an area on the map, hold down the ALT key and click the map where you want to begin searching. A green icon resembling a tack appears.
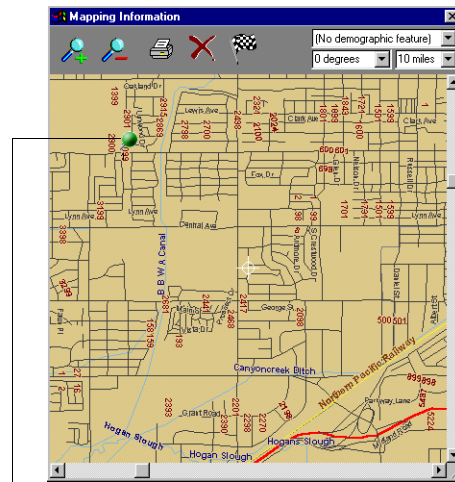
Search selection tack

5 While still holding down the ALT key, click on the map three more times. Click so that the area you want to search lies between the tacks. Once there are

four tacks on the map, the area between the four tacks is selected.

Search selection area
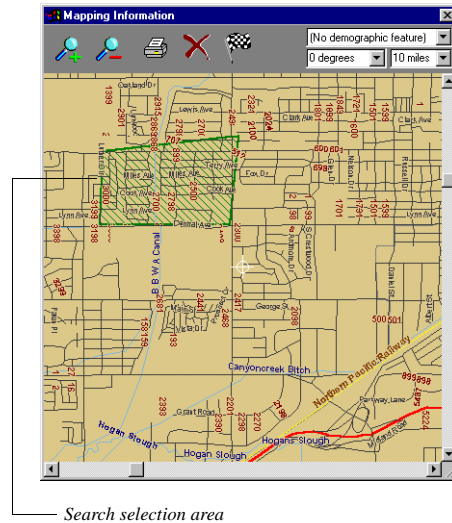
6 To select more than one map area for inclusion, repeat steps 4-5.

7 When you have selected the desired map area(s), click the **Finish** button or press the **ENTER** key on the keyboard. The Mapping Information dialog will close, but the selected map area(s) will be included in your search.

8 When you have finished entering all the desired information in the search Wizard, run the search by clicking the **Go** button.

Locating properties on an overview map

After you have performed a search and received a list of results, you may want to see at a glance where the search result properties are located, which prop-

erties are in the same neighborhood, or which are in different parts of town. Overview map functionality allows you to view all of the properties in your search results List View on a map.

Overview Map button

To view search result properties on an Overview Map:

These instructions assume you are looking at a group of search results.

1 Click the **Overview Map** button on the Next Step Bar. The Mapping Information dialog containing a map will open. All the properties in the search result List View will appear on the map.
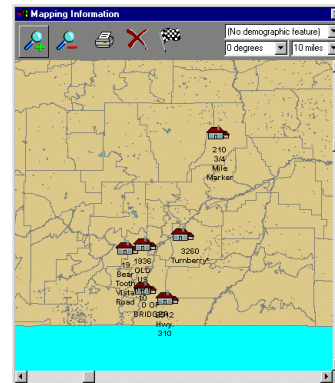
2 Click a property on the map to see its search result form.

3 When you are through using the overview map, click the **Finish** button, or press the **ENTER** key on the keyboard. The Overview Map will close.

Adding a map to a report

You can add a map to a report just like you would add any other field. For instructions on how to add a field to a form, see *Adding fields to reports* on page XX.

Repositioning a mapped property

Properties on data entry pages can be repositioned. If you place a map on a listing, Kinnexus determines the geographic location of the property based on the property address you enter. If the address is incomplete or ambiguous, however, Kinnexus will simply make its best guess as to the location of the property. Although this means that a property might be misplaced on a map, it is possible to move the property to the correct location.

To reposition a property on a map:

1 Click the **Listings** tab.

2 Click the **Listing Portfolio** icon.

3 Click the listing containing the property you wish to reposition.

4 Click the map on the data entry form.

5 Identify the correct property location on the map.

6 Single-click on the correct location. The property moves to the location where you clicked.

7 Click the **Finish** button or press the **ENTER** key. The new property location is saved.

Chapter 8

Text Formatting and Page Layout

This chapter shows you how to manage the appearance of data in Kinnexus through manipulating color, font, and border settings.

Because instructions for getting to the color, font, and borders settings depend on where you are in the program, you must look in an item's chapter to find out how to open the appropriate dialog. For example, if you would like to add a border to a Comparison View, you must look in the Comparison View chapter for instructions on how to open the Comparison View Borders dialog. Once you are in the correct dialog, however, the steps for creating a border are exactly the same no matter where you are in Kinnexus.

This chapter also shows you how to create and use page layouts. Page layouts let you set margins and add graphics, headers, and footers to printable Kinnexus documents.

Color

A color control allows you to change the color of text and objects. A color control is fairly easy to recognize and looks like this:

Color control

To change a font or object color:

8 Click the **Color Control**. The Color Selection palette will open.
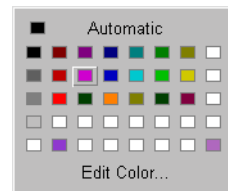
9 Double-click the desired text color. Any selected text or objects will change to the designated color.

10 Click OK.

Add Basic Colors

If you want to use a color that isn't on the Color Selection palette, you can select different colors using the Color dialog box. Adding a color replaces one of the colors on the Color Selection palette.

To add a color:
1 Click the **Color** control. The Color Selection palette appears.

2 Single-click a color box in the Color Selection palette. This color will be replaced when you add a color.

3 Click the **Edit Color** button.

4 Select the desired color from Basic Colors pal-ette.

5 Click the **OK** button. The color you selected is added to the Color Selection box.

Create Custom Colors

If you want to use a color that isn't on either the Color Selection or Basic Colors palette, you can cre-ate your own custom colors. Creating a custom color replaces one of the colors on the Color Selection box.

To edit a color:

1 Click the color control.

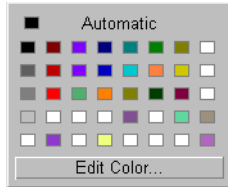**2** Single-click a color box in the Color Selection palette. This color will be replaced with your new color selection.

3 Click the **Edit Color** button. A Color dialog box appears.

4 Click the **Define Custom Colors** button. A color spectrum will appear.
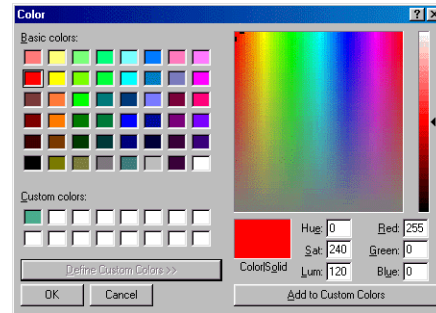
5 Click the color spectrum and, while holding down the mouse button, move your cursor across the spectrum until the desired color is displayed in the Color/Solid field. If no color appears in the Color/Solid field when you move the cursor, lower the luminance bar value at the right of the spectrum.

☼ Under Basic Colors, click the color that comes closest to the color you want. The cursor will move on the spectrum to the color you clicked, and you will be in the general vicin-ity of the color you want.

---

6 When the desired color appears in the Color/Solid field, release the mouse button.

7 Click the **Add to Custom Colors** button. The color you just created appears under Custom colors.

8 Click on the **OK** button. The color you just cre-ated will display in the Color Selection box.

Borders

You can add borders to several items in Kinnexus. For example, if you are editing a report you can add a border to a report, report page, frame, and/or paragraph. Other items you can add borders to in Kinnexus include Comparison Views and page layouts.

The instructions in this chapter show you how to use the Border dialog controls to create useful and attractive borders.

There are several different places in Kinnexus where you can add borders. When borders are available for an item, a Borders button displays on the appropriate properties dialog. A Borders button opens the Borders dialog and looks like this:
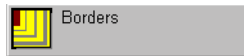
Borders button

Borders dialog

In the Borders dialog you can select a border setting, style and color.
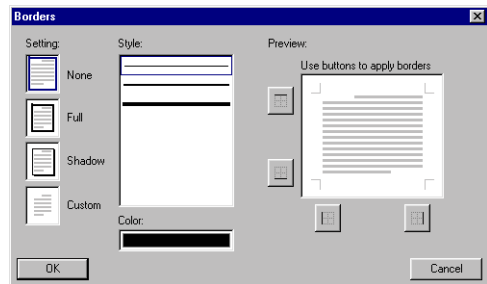
Borders dialog

Settings

Along the left side of the Borders dialog are page icons representing different border settings. Click the setting you prefer.

Setting	Icon	Instruction
None		Click this setting if you do not want a border.
Full		Click this setting if you want a visible border all the way around the item.
Shadow		Click this option if you want to fill in the background of the item.
Custom		Click this setting if you want to create a custom border.

Border settings

Style

To the right of the Settings options is a Style window containing borders styles.
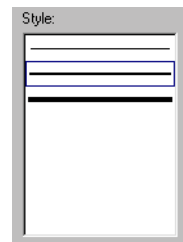
Style Settings

Click the border style you want to use and click the desired Setting to apply the new border style.

Color

Below the Styles window is a Color control. This control allows you to select a border color.

Color control

Preview

On the far right of the screen are the Preview controls. The Preview controls allow you to preview what the border will look like.

Preview settings

If you don't want every side of the item surrounded by the border, you can select which sides have borders and which don't. Select and deselect border sides by clicking the Preview buttons. Any changes made to the border using the Preview buttons appear in the Preview window. Using the Preview buttons automatically changes the setting to Custom.

To set a border around an item:

1   Click the appropriate Borders button. The Borders dialog opens.

1   Click the style you want to use for the border.

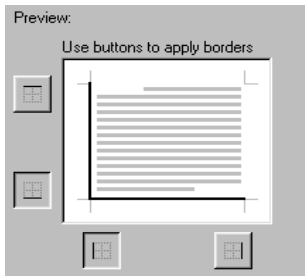**2**   Use the **Color** control to select a border color.

3   Click the border setting you want to use. The setting, style and color will preview in the Preview window.

4   If desired, use the Preview buttons to edit the border sides. If a Preview button is depressed, it means that the border for that side is displayed. Using the Preview buttons will change the setting to Custom.

5   When you are satisfied with how your border looks, click the **OK** button. The border you designed will be applied to the selected item.

Fonts

Font settings let you determine how text will appear on a page. A font is a set of characters of one face and dimension, or in other words, an alphabet in which each character shares the same style and size. Another word used interchangeably with font is typeface. Some commonly used fonts are:

Arial font
Times New Roman font
Kaufman font
`Courier font`

You can change font settings using the Font Format dialog. The Font Format opens when you click a Font button. Font buttons are found on certain properties dialogs, and look like this:
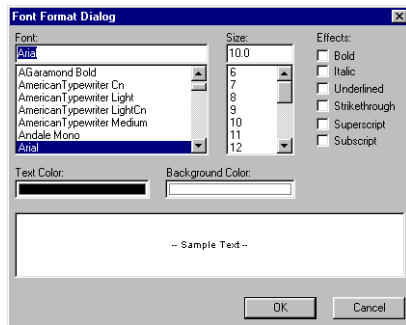

Font button

Changing fonts

You have complete freedom in assigning available font settings to the text on your pages. If you don't like a font, you can change it to another easily. Font

settings include font, font size, font color, background color, and effects. Font settings are set in the Font Format dialog.
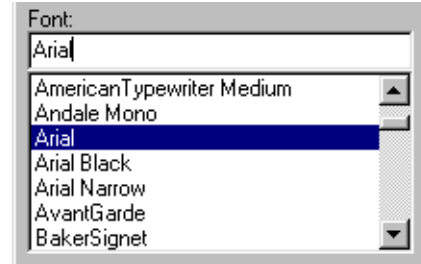

Font Format dialog

Font

You can change text's font easily using the Font setting. Keep in mind that Kinnexus does not install any new fonts—it uses the fonts that are already available on your computer. If you are creating forms that others might use, make sure you use standard fonts that are distributed with Windows. If you use fonts that were installed on your computer by another program (such as Corel Draw), Kinnexus will not know how to show those fonts on a computer that doesn't have the same programs installed.

To change the font:

6   Click the appropriate Font button.

7   Click the desired font in the Font scroll window. The font you selected displays in the Font field.

8   Click **OK**.

Font size

You can easily make the font size bigger or smaller using the Size setting.

To change the font size:

These instructions assume the Font Format dialog is open.

1   Select a font size from the **Size** list, or click in the **Size** field and type the desired font size. The selected text will change to the size you designated.

2   Click **OK**. The Font Format dialog closes.

Font color

If you have a color printer, Kinnexus can print in basically any color. Changing the font color can be a useful way to make items stand out on a page.

To change the font color:

1   Click the appropriate Font button.

1   Click the **Text Color** control. The Color Selector box appears.

2   Select a color from the Color Selector box, or create a new color.

3   Click the **OK** button.

Background Font Color

The default font background is white. It can be changed, however, to achieve a strong visual effect.

To change the background font color:

1   Click the appropriate Font button.

1   Click the **Background Color** control.

2   Select a color from the Color Selector box, or create a new color.

3   Click the **OK** button on the Font Dialog box.

Font Effects

There are several font effects you can use to emphasize the text on your reports. The following table shows you the text effects available to you in Kinnexus:

Font Effect	What it looks like
Bold	**-- Sample Text --**
Italic	*-- Sample Text --*
Underlined	<u>-- Sample Text --</u>
Strikethrough	~~-- Sample Text --~~
Superscript	-- Sample Text --
Subscript	*-- Sample Text --*

Font Effects

To apply text effects:

1   Click the appropriate Font button.

1   Place a checkmark in the checkbox next to the desired text effect(s).

2   Click the **OK** button. The text effect(s) you designated will be applied to the selected text.

Page layouts

Page layouts are a group of settings that can be applied to any printable Kinnexus view or form. Page layout settings include page margins, headers and footers, and borders. Using page layout settings, you can add things such as page numbers, company logos, and decorative borders to your documents.

This chapter will show you how to select page layouts and create new ones. Learning how to use page layouts will greatly enhance the appearance and cohesion of your documents.

Selecting a page layout

The currently selected page layout appears on all printable Kinnexus views or forms. If you want to use a different layout than the one currently being used, you must select a different page layout from the Page Layout Selection dialog. If you do not want to use a page layout, there is a 'No Page Layout' option.

To select a new page layout:

3   Click **File>Page Setup**. The Page Layout Selection dialog appears.

4 Click the **Current Page Layout** drop-down button.
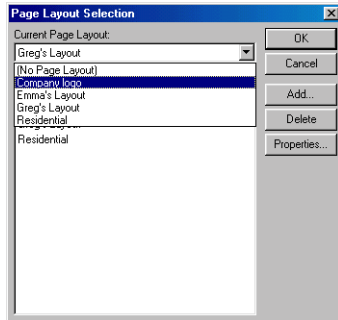
5 Select the desired page layout from the drop-down menu.

6 Click the **OK** button.

Printing page layouts

When you are ready to print a document, you can simply bring up the print dialog and click OK. The document will print with the current page layout. If you wish to change the current page layout before you print, there is a Page Layout control on the Print dialog.

To select a page layout from the Print dialog:

1 Open the document you wish to print.

2 Click **File>Print**. The Print dialog will appear. The name of the currently selected page layout displays in the Page Layout field.

3 Click the **Page Layout** drop-down menu arrow and select the desired page layout from the drop-down menu.

4 When you are ready to print, click the **OK** button. The selected page layout prints with document.

Creating a page layout

A page layout has three elements: margins, headers and footers, and borders. You can create a new page layout by manipulating these elements. Once you have created an new page layout, you can assign it to Kinnexus documents.

You create new page layouts in the Page Layout dialog.

To open the Page Layout dialog:

1 Click **File>Page Setup**. The Page Layout Selection dialog appears.

2 Click the **Add** button. The Page Layout dialog appears.
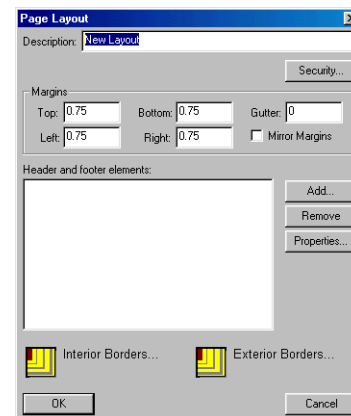
Page Layout elements

The Page Layout dialog contains controls for adding layout elements. You can use any combination of the three page layout elements—for example, you can create a page layout that contains only a simple header or border, or you can create a page layout containing all three elements—the choice is yours.

In order to give you the complete picture of page layout creation, the following sets of instructions show you how to use each control and field on the Page Layout dialog. Just remember that no element or field on the Page Layout dialog is required. Use only those Page Layout controls and fields that suit your purposes.

Description

In the Description field you name the new page layout to distinguish it from the others.

To name a new page layout:

The following instructions assume you are in the Page Layout dialog.

1 Click in the **Description** field and type a name for the new page layout.

Description:	Company logo

Margins

Margins are the blank space around the edges of the page. You insert text and graphics in the printable area inside the margins. You can position some page layout items, such as headers, footers, and page numbers, in the margins.

To set the margins for a new page layout:

The following instructions assume you are in the Page Layout dialog. All measurements are measured in inches.
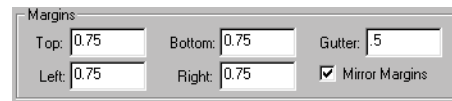
1 Click in the **Top** field and type the desired distance between the top of the page and the first line of regular text.

2 Click in the **Bottom** field and type the desired distance between bottom of the page and the last line of regular text.

3 Click in the **Left** field and type the desired distance between the left edge of the page and the left edge of unindented lines.

4 Click in the **Right** field and type the desired distance between the right edge of the page and the right edge of unindented lines.

5 Click in the **Gutter** field and type the distance you would like to add to the side margin. Gutter margins are recommended for pages that will be bound, because they assure that text is not obscured by the binding.

6 Select the **Mirror Margins** checkbox. Selecting this checkbox adjusts the left and right margins so that when you print on both sides of a page the inside margins are the same width and the outside margins are the same width.

Margins		
Top: 0.75	Bottom: 0.75	Gutter: .5
Left: 0.75	Right: 0.75	☑ Mirror Margins

Headers and Footers

You can create header and footer elements that include text or graphics—page numbers, the date, a company logo, the document's title or file name, or the author's name—that are usually printed at the top or bottom of each page in a document. A header element is printed in the top margin; a footer element is printed in the bottom margin. You can also use different headers and footers on odd and even pages or for part of a document.

A list of already existing header and footer elements appear in the Header and Footer elements field. There are three different kinds of header and footer elements: Expressions, Photos, and Bitmaps. You can add as many header and footer elements as you wish, but each element must be added separately.

To add header and footer elements to a new page layout:

The following instructions assume you are in the Page Layout dialog. All measurements are measured in inches.

1   Click the **Add** button on the Page Layout dialog. The Page Layout Header or Footer Element dialog appears.

2   Do one of the following:

• If you want to create an element containing an expression, select the **Expression** radio button. Right-click the **Expression** field and select the desired expressions. Click the **Font** button to select font settings for the expression.

• If you want to create an element containing a photo, select the **Photo** radio button. Click the **Photo** drop-down arrow and select the desired photo from the drop-down menu. Enter the desired photo height in the photo **Height** field.

• If you want to create an element containing a bit-map, select the **Bitmap** radio button. Click the **Browse** button to find the desired bitmap. Enter the desired bitmap height in the bitmap **Height** field.

3   Click the **Page** drop-down arrow and select those pages on which you would like the element to appear.

4   Click the **Location** drop-down menu and select the desired element location. If you select 'Custom', click in the **Custom** field and type the distance from the left margin you would like the element to appear. If you select a location already occupied by a header or footer element, the element you are adding will be placed beneath the previously added element.
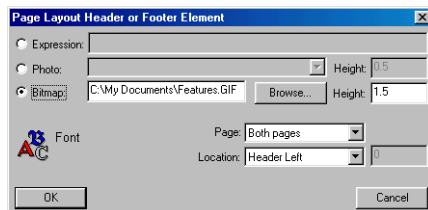
Chapter 9

Internet and Communications

In response to the need among Realtors for easier ways to communicate and get information, Kinnexus has integrated the Internet and email into the program. Kinnexus also contains features that allow you to communicate with groups and individuals within your board, and to use Kinnexus data in other programs, such as Microsoft Excel and Top Producer.

Kinnexus Internet

The Internet has been integrated directly into Kinnexus. Integrated Internet in Kinnexus allows you to:

• Browse web pages

• Create shortcuts to your favorite sites

• Create web reminders that appear in the To Do List

• Create dataclass links that appear on data entry pages and individual search results.

It is important to remember that Kinnexus is primarily an MLS system, not an Internet browser. If the system administrator finds that users surfing unrelated sites on the Internet are using too much bandwidth, access can be restricted. It is possible that some of the functions described in this section have been locked down by the system administrator and are not available.

Internet browser in Kinnexus

Internet terms

The following glossary has been included in case you are new to the Internet and unfamiliar with some of the terms used in this section.

Term	Definition
Browser	Allows you to view the content of web pages. The default browser used in Kinnexus is Microsoft Internet Explorer 5.0.
Web Page	Documents on the World Wide Web. Every web page is identified by a unique URL.
URL	Each web page has a specific address, also known as a URL (Uniform Resource Locator). Typing a URL into the Address bar and pressing the ENTER key takes you directly to the page. URLS are also referred to as web addresses.

Term	Definition
Link	Text or pictures that have URLs coded into them. You can tell a web page item is a link by placing your mouse cursor over it. If the cursor changes to a hand, the item is a link. Clicking a link takes you to the URL coded into the link.

The Internet system tray tab

Commands related to the Internet in Kinnexus are found in the Internet system tray at the left of the screen. The following table contains descriptions of the Internet icon types found in the Internet tray:

Icon	What it does
Home Page	Clicking the **Home Pag**e icon takes you to the board home page. The system administrator sets the URL of the home page. Most likely the home page is a board information page containing notices and information about upcoming board functions.
Search Page	Clicking the **Search Page** icon takes you to a search page containing links to several web search engines. You can select which search engine you want to use to search the Internet.
Realtor.com	Unlike the Home Page and Search Page icons, which appear in your Internet tray by default, you create your own shortcuts. Clicking a **Shortcut** icon brings up the web page you specified when you created the shortcut. With proper security clearance, you can create a shortcut that appears on every computer in your office.

Internet system tray icons

To open the Internet system tray:
5   Click the **Internet** tray tab at the left of the screen.

Internet Browser

The Kinnexus Internet browser not only lets you view web pages, but provides you with several tools for navigating the Internet.

To open the Internet browser:
1   Click the **Internet** tray tab.

2   Click the Home Page, Search Page or any shortcut icon on the tray tab. The web browser opens in the main view.

Navigating the Internet

Across the top of the browser is a toolbar containing several buttons that let you quickly and easily navi-*INTERNET TOOLBAR* gate the Internet. The following table defines each feature on the Internet toolbar:.

A B C D E F G

A The **Back** button returns you to the last page you viewed. Clicking the Back Button repeatedly retraces the websites you have visited during the current Kinnexus session.
B The **Forward** button enables only after pressing the Back button. Clicking this button takes you to the next page in a series of pages you have already visited.
C Clicking the **Stop** button stops whatever function the web browser is currently performing.
D Clicking the **Refresh** button reloads the current page

E Clicking the **Home Page** button takes you to the system home page defined by the system administrator.

F Clicking the **Create Shortcut** button begins the process of creating a new shortcut or a "To Do List" reminder.

G The **Address** bar contains the current web address. To go to another web site, click in the Address bar and type the new web address

To go to a new web page:

1   Click the **Internet** tray tab.

2   Open the web browser by clicking any icon in the tray.

3   Double-click in the Address bar. The entire URL becomes highlighted.

4   Type the desired URL.

5   Press the **ENTER** key on the keyboard or click the Done button at the right of the Address bar.

Web shortcuts

If you tend to visit the same web sites frequently, shortcuts can save you time. When creating a web shortcut, you assign a URL to a shortcut icon. Then whenever you click the shortcut icon, the browser opens to the assigned URL. You save the time it takes to open the browser and type the URL in the Address Bar.

Creating a Web shortcut

You can create a short cut to any web page you can see in the Kinnexus Internet browser.

To create a Web shortcut

6   Click the **Internet** tray tab.

7   Open the web browser by clicking any icon in the Internet tray.

8   Double-click in the **Address** bar. The entire URL becomes highlighted.

9   Press the **DELETE** key on the keyboard. This clears out the previous URL.

10 Type the URL you want to make a shortcut to.

11 Press the **ENTER** key. The web page is loaded.

12 Click the **Create Shortcut** button on the Internet toolbar. It is located next to the URL indicator. The Web Link Properties box appears.

13 Change the description of the shortcut to one or two words. By default it is the URL, but this generally is too long. The description appears under the icon in the system tray.
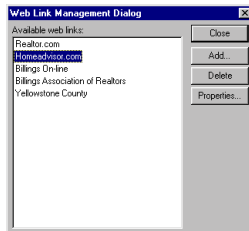

14 Click the OK button. The new shortcut appears in the Internet system tray.

Editing a web shortcut

You can edit the name or URL of a shortcut at any time.

To edit a web page shortcut:
1 Click **Tools>Web Link Management**. The Web Link Management dialog box appears.

2 Click the web shortcut you wish to edit.

3 Click the **Properties** button.

4 Edit the web shortcut.

5 Click the **OK** button to save your changes.

Deleting a web shortcut

You can delete any of the shortcuts you have created.

To delete a web shortcut, web page reminder or dataclass link:
1 Click **Tools>Web Link Management**.

2 Select the shortcut you want to delete from the Available Web Links window.

3 Click the **Delete** button.

Web page reminders in the To Do List

Kinnexus can remind you to check a web site by making a link to the web site appear in the To Do List. Clicking the link in the To Do List opens the browser to that address.

Creating a web page reminder

You can only create web page reminders for those URLs that are assigned to shortcuts.

To create a web page reminder:
4 If not already created, create a shortcut to the web page you are setting a reminder for.

5 Click **Tools>Web Link Management**. The Web Link Management dialog box appears.

6 In the list of shortcuts, click the one you would like to create a reminder for.
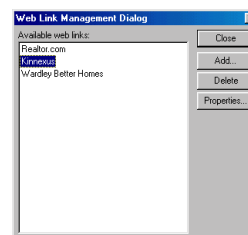
7 Click the **Properties** button. The Web Link Properties dialog box appears.

8 Select the **Global Link** radio button.

9 Click the **To Do List Events** drop-down arrow and indicate how often you would like the link to appear in the To Do List.
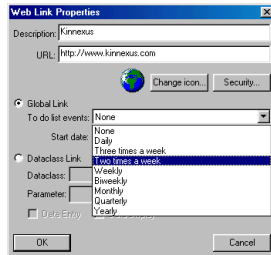
10 Click the **Start Date** drop-down arrow and select a date. This will be the date the weblink reminder begins appearing in the To Do List. You can scroll the months forward and back until you are able to click on the correct day. Click a day or press the **ESC** key on the keyboard to make the day selection box disappear.
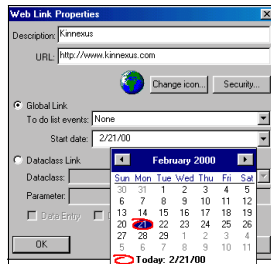
11 Click the **OK** button.

Editing a web page reminder:

You can change the frequency a web page reminder appears in the To Do List.

To edit a web page reminder:

1 Click **Tools>Web Link Management**. The Web Link Management dialog box appears.

2 Click the web shortcut with the reminder you wish to edit.

3 Click the **Properties** button.

4 Use the **To Do List Events** and **Start Date** drop-down menus to change the frequency of the selected web page reminder. If you want to remove a link from the To Do List completely, select **None** from the To Do List Events drop-down menu.

5 Click the **OK** button to save your changes.

Dataclass links

When you create a dataclass link, you specify what dataclass the link will apply to, such as Detached Single Family, Commercial, Rental, etc. The dataclass link appears on data entry pages or individual search result pages of properties with a matching dataclass. Clicking the dataclass link brings up the designated web page displaying information specific to the property.

Dataclass links are very useful when linked to websites that do calculations. For example, some sites geographically map properties based on the property address. If the dataclass link links to a mapping site, you can specify that the site opens to a map of the property you are viewing—you don't have to type in the property address. Other dataclass-friendly sites might contain mortgage calculators, or figure area demographics.

Creating a dataclass link

The first step in creating a dataclass link is selecting a dataclass for the link. As its name implies, a dataclass link applies to a certain dataclass, such as Residential, Commercial, Rental, etc.

After designating a dataclass, you need to specify what property information you want the dataclass link to display. You accomplish this by entering expressions that represent the desired information in the Parameters field.

After creating a dataclass link, the link appears on the Next Step Bar of every data entry page and/or individual search result that matches the selected dataclass. Simply click the dataclass link icon on the Next Step Bar to open the website.

To create a dataclass link:

1 Click **Tools>Web Link Management**. The Web Link Management dialog box appears.

2 Click the web shortcut you want to create a dataclass link for appear in the Web Link Management window.

3 Click the **Properties** button.

4 If not already displayed, type the desired dataclass link description in the **Description** field.

5 If not already displayed, type the desired URL in the **URL** field.

6 Click the **Dataclass Link** radio button.
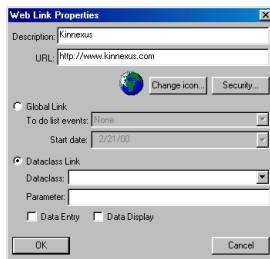
7 Click the **Dataclass** drop-down button.

8 From the Dataclass drop-down menu, select the dataclass you want to apply a dataclass link to.

9 In the **Parameter** field, enter expressions representing information you want the website to display. Right-click the field for a pop-up menu containing available expression components.

10 If you want to have the dataclass link available on data entry pages, select the **Data Entry** check box.

11 If you want to have the dataclass link available on individual search result pages, select the **Data Display** check box.

12 Click the **OK** button.

Deleting dataclass links

You can delete any dataclass links you have created.

To delete a dataclass link:

1 Click **Tools>Web Link Management**. The Web Link Management dialog box appears.

2 Click the web shortcut with the reminder you wish to delete.

3 Click the **Properties** button.

4 Delete the contents of the **Dataclass** and **Parameter** fields.

5 Click the **OK** button.

Email

Every licensed Kinnexus user has a Kinnexus email account. Kinnexus email is server-based, which means that you can access your mail from any computer that has Kinnexus installed. You can use your Kinnexus email account to keep in contact with your clients and colleagues by sending text messages and email attachments such as List Views and forms.

This section shows you how to:

• Create a new email message

• Include attachments in your email messages

• Manage your email folders (Inbox, Outbox, Sent Items, Deleted Items)

• Manage your mail settings

Email glossary

| Term	Definition
Email Address	An email message is similar to a street address. If you want to send an email message, you must know the email address of the person you are sending the message to. Anyone who wants to send you an email must know your email address. If you do not know your email address, contact your board.
Attachment	An attachment is a file of any type, such as a document, sound file, picture, or Kinnexus view, that is sent in an email. An attachment can be sent by itself or with a message.
Forward	Forwarding lets you send a message you have received to someone else.
Reply	Replying lets you respond to the sender of a message you have received.
Reply to All	Replying to all lets you respond to the sender and any others who received the original message.
Mark as Read	Marking as read any new, unopened message, makes the message look like it has been opened.
Drafts	Drafts are messages that have not been sent. These messages are stored in the Drafts folder and can be completed and sent at any time.

Creating new email messages

To create a new email message:

6 Click the **Mail** tray tab.

7 Click the **New Message** icon. A new, blank message appears.
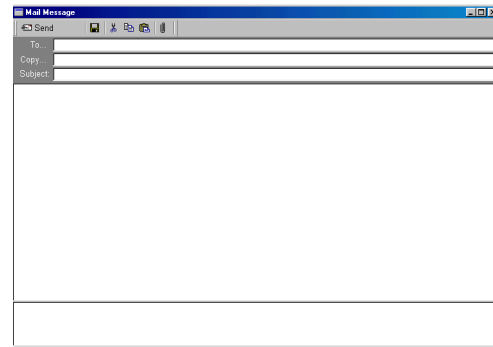
8 Click in the **To** field and type the email address(es) of the person or persons you want to send the message to. Remember to separate each email address with a semicolon (;).

9 If you wish to send the email as a copy, click in the **Copy** field and type the email address(es) of the person or persons you want to send a copy of the message to.

10 Click in the **Subject** field and type a subject for the message.

11 Click in the main message window and type your message.
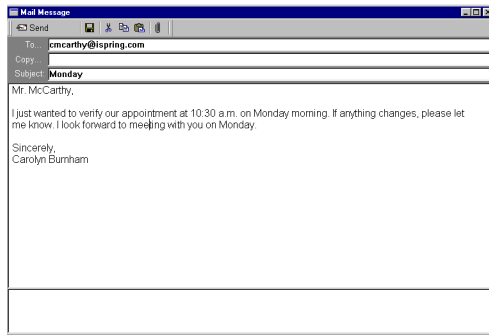
12 If you want to save a draft of the message to finish at another time, click the **Save** button. The draft saves to your Drafts folder.

13 If you are ready to send the message, click the **Send** button.

Email attachments

An email attachment is a file attached to an email message. You can attach any Kinnexus view and files of any type to email messages. For example, you can attach a Kinnexus List View, or a property photo to an email message. The recipient of the message can open the attachment and view the List View or photo. Kinnexus views and other file types are attached to email messages differently.

Attaching Kinnexus views to email messages

Kinnexus converts whatever is on the screen to HTML (Hyper Text Markup Language—the language of the Internet) so another person can view the information without the Kinnexus program. The converter is very accurate, and you will find that most of the attachments look the same in HTML as they do in Kinnexus.

If you have a list of search results you want to send to someone, and are looking at the list of results on the screen, click the Send View button on the Action Bar. The List View or search results are converted to HTML and attached to a new email message. You can then address the email message and enter any message you want.

Note: Overlapping frames on a Kinnexus form will cause problems for the HTML converter, as there are no overlapping frames in HTML.

To attach Kinnexus views:

1 Open the view you want to attach to an email message.

**2** Click the **Send View** button on the Action Bar. A new email message opens with the view attached.
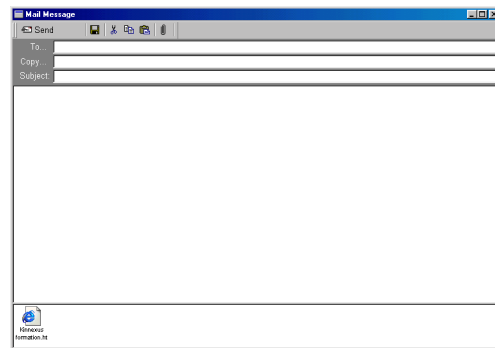
💡 *You can send multiple views in one message by converting views to HTML format and saving them to file. (See Exporting Data on page XX) Then follow the To attach files instructions on page XX to attach the views as separate files.*

Attaching files to email messages

Files are attached to messages in their original format. If you attach a Microsoft Word document to a message, for example, Microsoft Word opens when the recipient opens the attachment.

To attach files:

1 Open the message you want to attach a file to. You can attach files to new messages and saved drafts.

2 Click the **Attach** button on the email message.
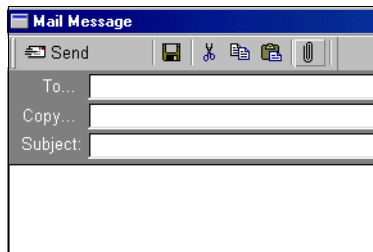
3 Select the file you want to attach in the Open dialog.

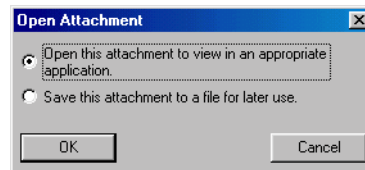**4** Click the **Open** button on the Open dialog. The file attaches to the message.
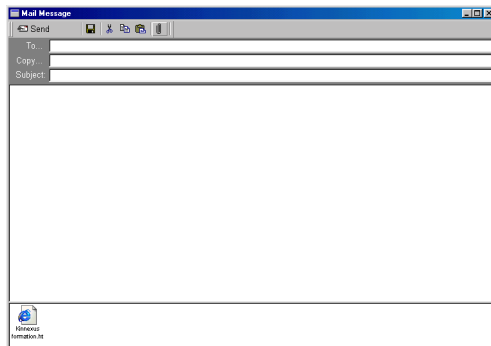
5 Repeat steps 2-4 for each file you want to attach.

Viewing received attachments

When you receive an email attachment, you can choose to open the attachment from the email message, or save the attachment on your computer for later viewing. In order to open the attachment you must have an application that can read the attachment installed on your computer. For example, if you receive a Microsoft Excel document as an attachment, you must have Microsoft Excel installed on your computer in order to open the attachment.

To open an attachment from an email message:

1 Open the email containing the message you want to open.

2 Double-click the attachment. The Open Attachment dialog appears.

3 Select the **Open this attachment to view in an appropriate application** radio button.
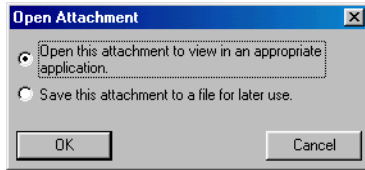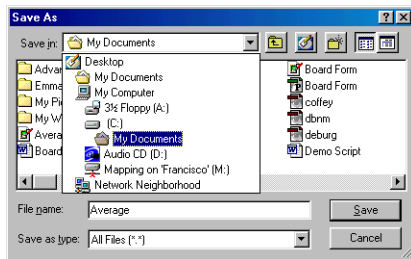
4 Click the **Open** button.

To save an attachment to file:

1 Open the email containing the message you want to open.

2 Double-click the attachment. The Open Attachment dialog appears.

3 Select the **Save this attachment as a file for later use** radio button.

4 Click the **Save in** drop-down arrow on the Save As dialog and select the location where you want the document saved.

5 Click the **Save** button.

Email Folders

Kinnexus email contains five default email folders. These folders help you effectively manage and organize your communications. Each folder contains a list of categorized email messages. Email folders function just like List Views and Comparison Views—you double click an item (in this case an email message) to open it, you add columns or rows to an email folder by dragging fields from the Field Chooser to the column headers or row headers, etc.

The following table contains a list of the default Kinnexus email folders..

Icon	Email Folder
	The **Inbox** folder contains new messages you haven't read, and any messages you've read but haven't deleted or moved to another folder. Blue font marks an unread message. A message is considered read once it has been opened.
	The **Drafts** folder stores messages you are not ready to send. These messages may be incomplete, or perhaps you are waiting to send them at a later time. You can open a message in the Drafts folder, complete the message, and send it.
	The **Outbox** folder temporarily holds messages you have sent, but have not yet been pulled from your computer to your email server for delivery. If you are online, messages will stay in the Outbox for only a short time. If you are offline, your sent messages will remain in the Outbox until you go back online.
	The **Sentbox** folder contains copies of all the messages you have sent.
	When you delete a message in the other email folders, it is moved to the **Deleted** folder. You can retrieve any of the messages in the Deleted Folder. If you delete a message from the Deleted folder, however, the message is permanently deleted and you will not be able to retrieve it.

Custom email folders

You can also create your own email folders. You get to decide which messages go in custom folders. For example, you can create a folder to contain messages regarding a specific property, or messages from a specific person. You can create as many custom folders as you want.
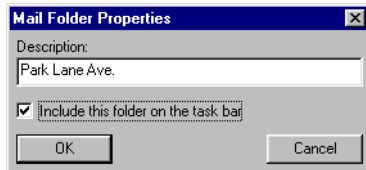
To create a custom folder:

1 Click the **Mail** tray tab.

2 Click the **Mail Folders** icon. Your mail folders display.

3 Click the **New Folder** button on the Next Step Bar. The Mail Folder Properties dialog appears.

4 Click in the **Description** field and type a name for the folder.

5 Click in the **Include this folder on the task bar** checkbox if you want the folder to appear on the Mail tray tab.
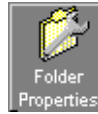

6 Click **OK**.

To change a custom folder's properties:

1 Click the **Mail** tray tab.

2 Click the **Mail Folders** icon. Your mail folders display.

3 Select the folder whose properties you want to change.

4 Click the **Folder Properties** button on the Next Step Bar. The Mail Folder Properties dialog appears.

5 Make any desired changes to the folder properties.

6 Click **OK**.

To delete a custom folder:

1 Click the **Mail** tray tab.

2 Click the **Mail Folders** icon. Your mail folders display.

3 Select the folder you want to delete.

4 Click the **Delete Folder** button on the Next Step Bar.

Email Messages

The following sets of instructions show you how to open, reply to, and forward email messages.

To open an email message:

1 Click the **Mail** tray tab.

2 Click the desired mail folder icon.

3 Find the message you want to open in the folder contents and double-click it.

To delete an email message:

1 Open the folder containing the message you want to delete.

2 Highlight or open the message you want to delete.

3 If you highlighted the message, click the **Delete** button on the Next Step bar. If you opened the message, click the **Delete** button on the open message.

To forward an email message:

1 Highlight or open the message you want to forward.

2 If the message is highlighted, click the **Forward** icon on the Next Step Bar. If the message is open, click the **Forward** button at the top of the message.

A new email message appears. *Fw:* appears in the Subject field and the original message appears in the main message window.

3 Click in the **To** field of the message and type the email address of the person you want to forward the message to.

4 If you wish to add anything to the message, click in the main message window and type the desired text.

5 When you are ready to send the message click the **Send** button at the top of the message.

To reply to a message:

1 Highlight or open the message you want to respond to.

2 If you highlighted the message, click the **Reply** button on the Next Step bar. If you opened the message, click the **Reply** button at the top of the mes-

sage.

A new email message opens. The email address of the person who sent the original message appears in the *To* field. A new email window appears. *Re:* displays in the Subject field, and the original message displays in the main message window.

3 Click in the main message window and type your message.

4 When you are ready to send the message click the **Send** button at the top of the message. Your reply is sent to the address in the *To* field.

To reply to all:

1 Highlight or open the message you want to respond to.

2 If you highlighted the message, click the **Reply to All** button on the Next Step bar. If you opened the message, click the **Reply to All** button at the top of the message.

A new email message opens. Every email address in the *To* and *Copy* fields of the original message appears in the *To* field. A new email window appears. *Re:* displays in the subject field, and the original message displays in the main message window.

3 Click in the main message window and type your message.

4 When you are ready to send the message, click the **Send** button at the top of the message. Your reply is sent to the addresses in the *To* field.

To move a message from one folder to another (Change Folder):
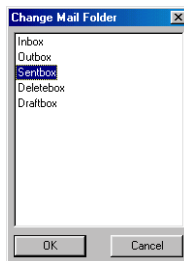
1 Open the mail folder containing the message you want to move.

2 Select the message you want to move to another folder.

3 Click the **Change Folder** icon on the Next Step Bar.
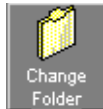
4 In the Change Mail Folder dialog, highlight the email folder you want to move the selected message to.

5 Click the **OK** button.

To mark a message as read:

1 Open the mail folder containing the message(s) you want to mark as read.

2 Select the new message(s) you want to mark as read.

3 Click the **Mark as Read** icon on the Next Step Bar.
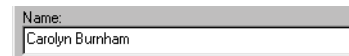
Mail settings

Using your mail settings, you can instruct Kinnexus to either retrieve messages from other email accounts or forward all messages sent to your Kinnexus account to another email account. You can also decide how you want your name to appear in messages you send, and what email account you want replies to your messages sent to.

Name

When you receive a message, the name of the person who sent the message appears in the *From* field. You can determine how your name will look in recipients' *From* field by typing the desired name in the Mail Settings *Name* field. A user named Carolyn Burnham, for example, can choose Carolyn Burnham, Carol Burnham, Cari B. or simply Carolyn as her sender name.

To set a sender name:

1 Click **Tools>Mail settings**.

2 Click in the **Name** field and type your name exactly how you would like it to appear on all your sent messages.

3 Click **OK**.

Reply address

The Reply address field on the Mail Settings dialog contains the address to which replies to your Kinnexus messages will be sent. The default reply address is your Kinnexus email address, but your reply address does not have to be the same as the

address you sent the message from. You can send a message from your Kinnexus account, and when the recipient clicks the Reply button, the default reply address can be your home email address.

To set the Reply address:

1 Click **Tools>Mail settings**.

2 Click in the **Reply address** field and type the desired reply address.

> Reply address:
> carolynb@kinnexus.com

3 Click **OK**.

Additional addresses

In addition to your Kinnexus email account, you might have an office email account and a home email account. Instead of having to check three different email accounts every day, you can have Kinnexus automatically retrieve messages from your other accounts.

Adding a POP3 profile

In order to have messages from another account forwarded to your Kinnexus account, you must add the other account as a POP3 server profile.

Additional POP server profile.

To add an additional POP3 server profile:

1 Click **Tools>Mail Settings**. The Mail Settings dialog opens. A list of POP3 server profiles that have already been added appear in the Additional POP3 profiles field.

2 Select the **Additional POP3 profiles** radio button.

3 Click the **Add** button.

4 Click in the **Description** field and type a name for the new profile. The name will distinguish this profile from other profiles you create.

5 Click in the **Reply address** field and type a reply address for messages sent to the profile you are adding.

6 Click in the **POP Server** field and type the server name of the profile you are adding.

7 Click in the **Account name** field and type the account name.

8 Click in the **Password** field and type the password you use to access the account profile you are adding.

9 If you want messages from the account profile you are adding to appear in both Kinnexus and the original account, select the **Leave messages on server** checkbox. If you want messages to appear only in your Kinnexus account, leave the **Leave messages on server** checkbox empty.

10 Click **OK**.

Deleting an additional POP server profile
You can delete any POP3 profile that you have added.

To delete an additional POP server profile:

1 Click **Tools>Mail Settings**.

2 Select the account you wish to delete in the Additional POP3 profiles window.

3 Click the **Delete** button.

4 Click **OK**.

Editing an additional POP server profile
You can edit the properties of any additional POP server profile that you have added.

To edit an additional POP server profile:

1 Click **Tools>Mail Settings**.

2 Select the account you wish to delete in the Additional POP3 profiles window.

3 Click the **Properties** button. The Additional POP server profile dialog opens.

4 Make any desired changes to the additional POP server profile.

5 Click the Additional POP server profile **OK** button.

6 Click the Mail Settings **OK** button.

Forwarding Address
You can automatically forward all your Kinnexus email to another email account. For example, you can have all your Kinnexus mail sent to your home email account.

To set a forwarding address:

1 Click **Tools>Configuration**.

2 Click the **Forwarding Address** radio button.

3 Click in the **Forwarding Address** field and type the email address you would like your Kinnexus messages sent to.

4 Click **OK**.

Public folders
A public folder functions much like a bulletin board. If you are subscribed to a public folder, you can view all messages that have been previously posted in that folder. You can also post messages that can be viewed by everyone else subscribed to that folder. An Open House folder, where subscribers can view, post, and receive open house announcements, is an example of a public folder.

Public folder contents vary from board to board. Some public folders are available to all members of the board. Other folders containing group-specific content are available only to certain users. For

instance, almost everyone will have access to the public folders that allow you to send and view messages about open houses or new listings. But more specific topics, such as commercial real estate and form design, will have limited membership. The person who creates a public folder (usually the system administrator) determines who can subscribe to the folders.

Viewing your public folder list

It is likely that you have access to more than one public folder. The Public Folder Management dialog appears containing a list of the public folders to which you have access.

To view a list of the public folders available to you:

5   Click Tools>Public Folders Management.
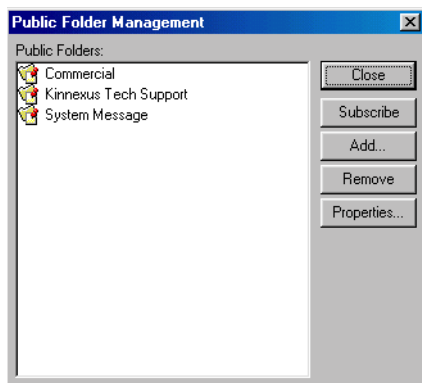
Subscribing and unsubscribing to a public folder

To be able to view and post messages to a public folder, you must be subscribed to that folder. If you do not wish to view or receive messages from a folder you are subscribed to, you can unsubscribe from the public folder.

To subscribe or unsubscribe to a public folder:

1   Click **Tools>Public Folders Management**. The Public Folder Management dialog appears. A list of the public folders you have access to displays in the window. Icons next to each public folder indicate whether you are subscribed to that public folder.

🔖 System Message	📁 System Message
Subscribed icon	*Unsubscribed icon*

2   Select the public folder you wish to subscribe or unsubscribe to.

3   If you are not subscribed to the selected public folder, and you wish to subscribe, click the **Subscribe** button. The selected public folder icon will change to show that you are subscribed.

4   If you are already subscribed to the selected public folder, and you wish to unsubscribe, click the **Unsubscribe** button. The selected public folder icon changes to show that you are unsubscribed.

5   Click the **Close** button.

Viewing public folder contents and messages

Public folder contents are set up in tree form, meaning that a new message forms a root message. All other messages relating to the root message appear

subordinate to the root message. Subordinate messages can respond to the root message or to other subordinate messages. This way, you can clearly distinguish the original (root) message from its related subordinate messages.


root message

subordinate message
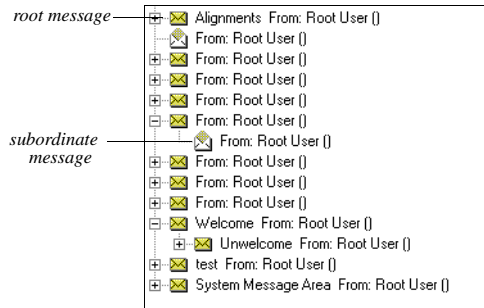
Public folder contents

To view public folder contents:

1 Click the **Mail** tray tab. Icons representing the public folders you are subscribed to appear in the Mail tray.

2 In the Mail tray, click the desired public folder icon. The selected public folder and its root messages display.

3 Click the plus sign next to any message to view any subordinate responses. Closed, yellow envelopes represent messages that have not been opened

before. Open, white envelopes represent previously opened messages.
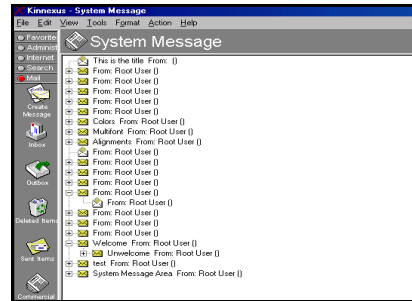
To view a public folder message:

In the public folder contents, identify a message you would like to view and double-click it. The message opens as an email message.

☼ If a Public Folder contains new messages, the name of the folder and the number of new messages in it will display in the To Do List. To open the folder and view your messages, you can simply click the folder name in the To Do List.

Creating and sending public folder messages

Several options exist for creating and sending public folder messages. You can create and post new root messages and send subordinate responses to the entire public folder. Using email, you can forward a public folder message to another individual, or respond directly to the individual who posted a message. Messages sent via email are not posted to public folders.

To create a new root message:

1 Click the **Mail** tray tab. Icons representing the public folders you are subscribed to appear in the Mail tray.

2 In the Mail tray, click the public folder icon you wish to view. The selected public folder and its root messages display.

3 Click the **New Message** button on the Next Step Bar. The name of the public folder you are in appears in the To field.
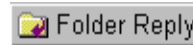

4 Click in the **Subject** field of the new email message and type your subject.

5 Click in the message window and type your message.
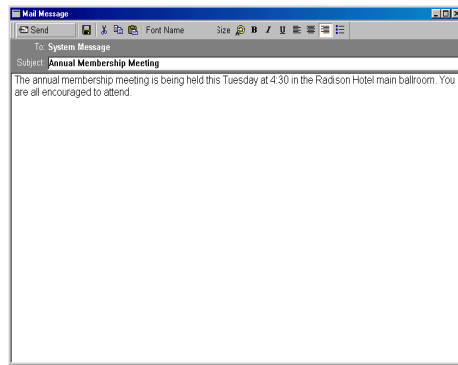
6 When you are ready to send the message, click the **Send** button at the top of the message. The message will be sent to the public folder and displayed as a new root message.

To reply to the entire public folder:

1 Select or open the message you want to respond to.

2 If the message is selected, click the **Reply to Folder** button on the Next Step Bar. If the message is open, click the **Folder Reply** button at the top of the message. A new email message opens. The name of the public folder you are in appears in the To field. Re: and the subject of the message you are replying to appears in the Subject: field.

3 Click in the main message window and type your message.

4 When you are ready to send the message, click the **Send** button at the top of the message. The message is sent to the public folder subordinate to the root message it refers to.

To forward a public folder message to another individual via email:

1 Highlight or open the message you want to forward.

2 If the message is highlighted, click the **Forward** button on the Next Step Bar. If the message is open, click the **Forward** button at the top of the message.
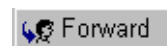
A new email window appears. FW: appears in the Subject field, and the original message appears in the main message window.

3 Click in the **To** field of the message and type the email address of the person you want to forward the message to.
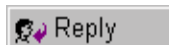
4 If you wish to add anything to the message, click in the main message window and type the desired text.

5 When you are ready to send the message, click the **Send** button at the top of the message. The message is sent to the address in the To field.

To reply via email to an individual who has posted a public folder message:

1 Highlight or open the message you want to respond to.

2 If the message is highlighted, click the **Reply** button on the Next Step Bar. If the message is open, click the **Reply** button at the top of the message.

The email address of the person who sent the original message appears in the To field. A new email window appears. Re: displays in the subject field, and the original message displays in the main message window.

3 Click in the main message window and type your message.

4 When you are ready to send the message, click the **Send** button at the top of the message. The message is sent to the email address in the To: field.
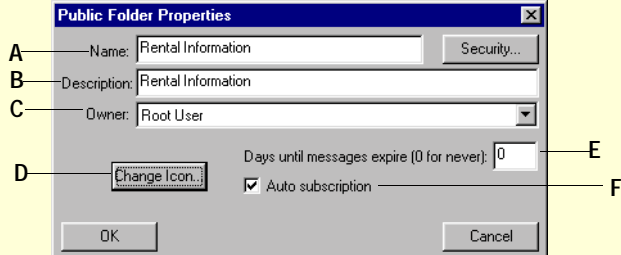
Public Folder Properties

If you have adequate security access, you can change the name and owner of a public folder, decide when you want messages in a public folder to expire, and decide who will have access to the public folder. These features are set in the Public Folder Properties dialog.

To change Public Folder properties:

1   Click **Tools>Public Folder Management**.

2   Select the public folder whose properties you want to change.

3   Click the **Properties** button.

4   Make the desired changes.

5   Click **OK**.

PUBLIC FOLDER PROPERTIES DIALOG

A Type a name for the public folder.

B Type a description for the public folder.

C Click the **Owner** drop down menu and select an owner for the public folder.

D Change the system tray icon for the public folder by clicking the **Change Icon** button and selecting the desired icon from the Open dialog.

E Type the desired number of days before messages in the selected public folder expire.

F Automatically subscribe everyone with adequate security rights to the selected public folder by placing a check mark in the **Auto Subsciption** checkbox.

Chapter 10

Data Replication

Kinnexus data replication software allows you to download parts of the database to work on offline. If you have a laptop computer and connect from different locations like work and home, data replication gives you the freedom to travel and still work with Kinnexus. If you work on an office network, data replication lets you share a local offline database server with your office.

This chapter will show you how to:

• Install Kinnexus data replication software (Local Database Server and Local Database Client)

• Replicate data by downloading replication profiles to your computer

• Add, remove, and edit replication profiles

• Install data sets from a Local Data Setup CD

Local Database Server and Client

In order to replicate data, you need to first install server software. Kinnexus comes with a local database server called Microsoft Database Engine (MSDE) that you can install on your laptop or on a machine in your office network. Microsoft Database Engine is a free version of SQL server with reduced features. Within the Kinnexus program, MSDE is referred to as Local Database Server. We recommend that any computer on which you install Local Database Server have 64 available megs of RAM. If you are installing the Local Database Server software for your office, only install the software on one computer in the network. All other computers on the network need to install Local Database Client in order to access the Local Database Server.

Although the Local Database Server is able to support most systems, it has the following limitations:

• Local Database Server cannot support more than five simultaneous querying users.

• Local Database Server cannot support a database larger than two gigabytes.

If these limitations are not compatible with your office, you may need to purchase a complete version of SQL server from Microsoft in order to replicate data.
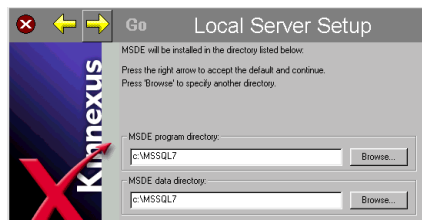
To install Local Database Server:

Install Local Database Server on your laptop or personal computer, or if you are on a network, install it on one computer in your network.

1 Close any open programs on your computer.

2 Insert the Kinnexus CD into the CD-ROM drive of the computer. The Kinnexus Setup screen appears.

3 Click **Local Database Server** on the Setup screen.
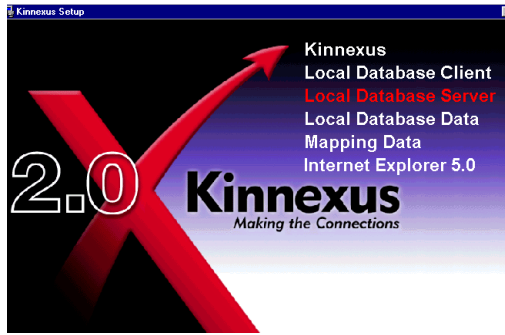
4 On the Welcome screen, click the **Next** button.

5 Do one of the following:

• If you want Local Database Server software installed to the default directory, leave the **MSDE program directory** field as it is.

• If you want Local Database Server software saved to a different directory, click the MSDE Program Directory **Browse** button and select the desired directory.

6 Do one of the following:

• If you want Local Database Server data installed to the default directory, leave the MSDE program directory field as it is.

• If you want Local Database Server data saved to a different directory, click the MSDE Program Directory Browse button and select the desired directory.
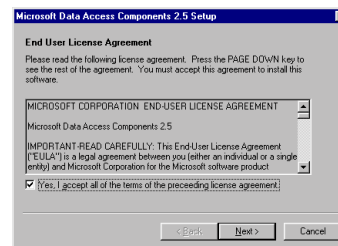

7 Click the **Next** button.

8 When you are ready to install Local Database Server, click the **Go** button.

To install Local Database Client:

Install Local Database Client if you share a local offline database server with your office.

1 Close any open programs on your computer.

2 Insert the Kinnexus CD into the CD-ROM drive of your computer. The Kinnexus Setup screen will appear.

3 Click **Local Database Client** on the Setup screen.

4 Read the licensing agreement. If you agree, select the **Yes, I accept all of the terms of the preceding license agreement** checkbox at the bottom of the agreement.

5 Click the **Next** button.

6 Click the **Next** button again to begin the installation.

7 When all the components have been installed, click the **Finish** button.

Replicating data

Data Replication involves downloading portions of the database onto your computer. These 'portions' are called replication profiles. You can replicate as many replication profiles as can fit on your com-

puter, but you can only replicate one profile at a time.

Kinnexus will not replicate portions of the database that have already been replicated. For instance, suppose you replicated a profile called Middleton/Fairview to your computer. Now suppose you also want to replicate the portion of the database containing listings for Springfield. The only replication profile containing Springfield listings is the Middleton/Springfield profile. Kinnexus recognizes that you already have the Middleton listings and only replicates the Springfield listings.

Each time you replicate a profile you must perform a cold start. Once a profile has been replicated, either by you or another user working on your computer, you can make changes to the data offline.

After the first replication profile has been replicated on your computer, Kinnexus will always open offline. Once Kinnexus opens, you can choose to continue working offline, or choose to work online. See *Updating the database on page XX* for instructions on how to switch from working offline to online and vice versa.

To replicate (download) a replication profile:

1   Open Kinnexus. If Kinnexus is already open on your computer, close it and then open it again.

2   At the Kinnexus Logon page, click the **Next** button. You will receive a warning informing you that you are about to perform a cold start. Click the **Yes** button. The warning closes.
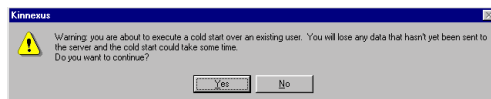
**3**   Click the **Next** button on the Welcome to Kinnexus page.

4   The Download Profiles dialog appears. Select the **Select a profile that describes the database portion you want to download** radio button.

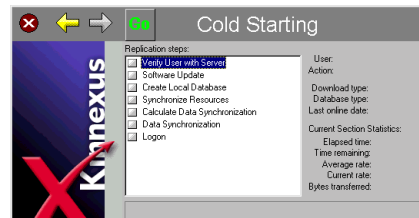**5**   Select the desired replication profile from the window beneath the radio buttons.
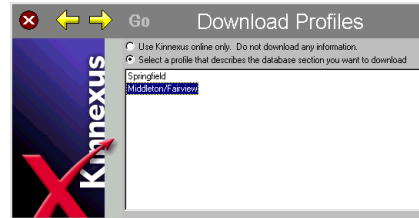
6   Click the **Next** button.

7   On the Local Database page, select the radio button that describes the kind of local database Kinnexus uses on your computer.
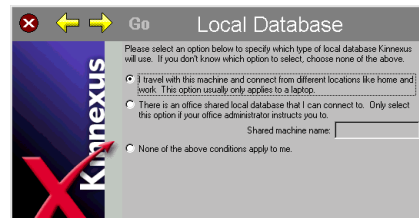
8   Click the **Next** button.

**9**   Click the **Go** button on the Cold Starting page.

Updating the database

Once you have made offline changes to data, you need to update the online database with the changes you have made to the data in your replication profiles. You will also need to update your replication profiles with the changes made by other users working both online and offline.

To update the online database with changes you have made offline:

1   Go online by clicking File>Work Online.
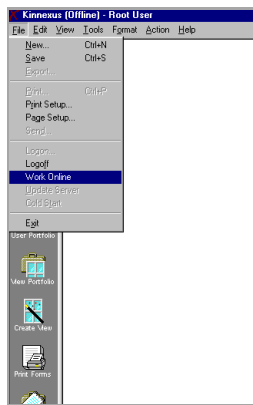
Note: Your office can make changes to your listings at any time. Your office might make a change to a listing online, and you might make a change to the same listing offline. If this happens, when you go back online your change will override the change made by your office. If both you and the office are editing the same listing offline, the changes made by the last user to go back online will override the changes made by the first user to go back online.

To receive changes made by other users:

1   If you haven't already, go online to update the server with your offline changes by clicking **File>Work Online**.

2   Go offline again to receive the changes made to the database by other users by clicking **File>Work Offline**.
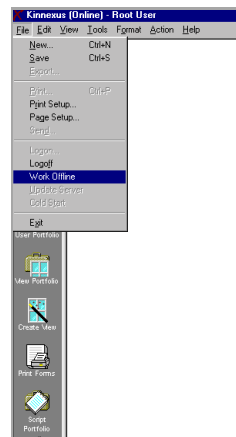
Note: Receiving updates to the server can take a while. If time is a consideration, you are given the option of downloading changes to the database at a later time.
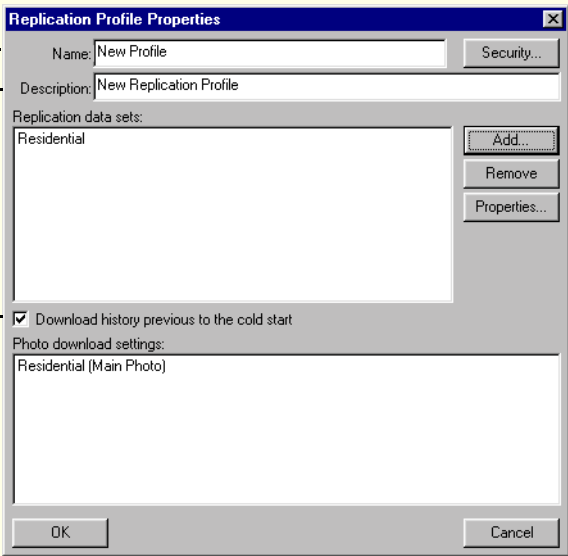
Adding, removing, and editing replication profiles

This section shows you how to create your own replication profiles, and how to manage your existing profiles. All the controls necessary for adding, removing, or editing replication profiles are contained in the Replication Profile Properties dialog.

REPLICATION PROFILES DIALOG

To open the Replication Profile Properties dialog:

1 In Kinnexus, click **Tools>Replication Profiles**. The Current Replication Profile dialog appears.

2 Click the **Add** button. The Replication Profile Properties dialog appears.

A Type a name for the data set

B Name the new replication profile to distinguish it from the others.

C Add data sets to the replication profile. See page XX for detailed instructions.

D Select this checkbox if you want past transactional fields recording changes made to field included in the data set. See page XX for more information about history records.

E Select which, if any, photo types you want downloaded. See page XX for detailed instructions.

Adding a replication profile

If none of the replication profiles created by your system administrator contain the data you need, you can create your own replication profiles. You create new replication profiles in the Replication Profile Properties dialog. Creating a replication profile involves naming the profile, adding data sets, choosing download history settings, and designating what photos will be downloaded.

Note: Once you have added a replication profile, you must download the profile to your computer before you can work with the profile offline. Downloading a replication profile is called replication. See page XX for instructions on how to replicate.
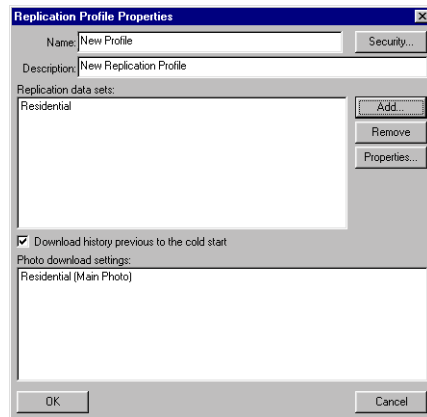
Replication data sets

Replication profiles are made up of downloadable sections of the database. These sections are called replication data sets. Replication data sets are defined by running a search. The search results form a data set within a replication profile. A replication profile's data sets appear in the Replication Data Sets field. You can add as many data sets to a replication profile as you wish.

To add a data set to a replication profile:

These instructions assume the Replication Profile Properties dialog is open.

1 Click the **Add** button on the Replication Profile Management dialog. The Replication Profile Properties dialog appears.

2 Click the **Add** button at the left of the Replication Data Sets field.

3 In the Type window, select the dataclass of the data you want to download.

4 From the Available Wizards window, select the wizard you want to use to search for the data you wish to download.
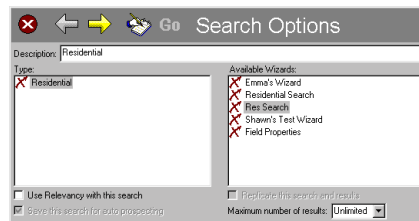
5 Click the Next button.

6 Enter the desired search criteria in the wizard fields.

7 When you have entered all the desired criteria, click the **Go** button. The data set is added to the Replication Data Sets field.

To delete a data set:

These instructions assume the Replication Profile Properties dialog is open.

1 Highlight the data set you want to delete.
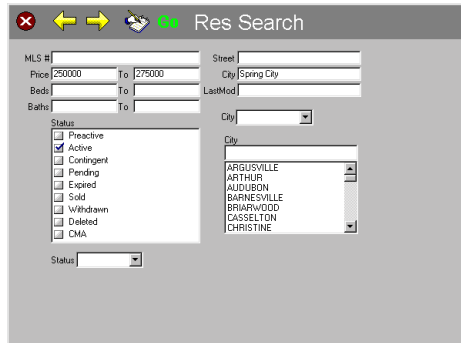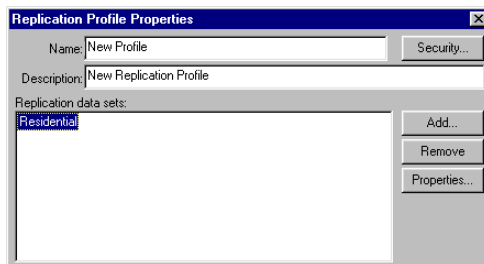
2 Click the **Remove** button.

3 Click the **OK** button.

To edit a data set:

These instructions assume the Replication Profile Properties dialog is open.

1 Highlight the data set you want to edit. The replication wizard appears.

2 Change any desired replication criteria.

3 Click the **OK** button.

Download history previous to the cold start checkbox

Some fields in your replication data sets might have past transactional records associated with them. Referred to as 'history' records, past transactional records track changes made to certain fields. Your system administrator determines which fields have history records. For example, your system administrator can create a price change history for the Price field. Opening the Price field's history will show you any changes made to the property's price.

To include history records from before replication:

These instructions assume the Replication Profile Properties dialog is open.

1 Select the **Download history previous to the cold start checkbox**. If you are not interested in history records from before you downloaded the replication profile, leave the checkbox empty.
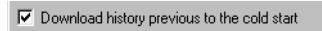
Photo download settings

You don't have to download all the photos in a replication profile. You can select which, if any, photo types you want downloaded.

The name of each dataclass included in the replication profile displays in the Photo Download Settings field. For example, if you have added Residential and Commercial data sets to the replication profile, and both Residential and Commercial data sets contain photos, Residential and Commercial will appear in the Photo download settings. Next to each data-

class that contains photos, selected photo types display between parentheses. If you double-click a dataclass, a dialog appears, allowing you to select which photo types to include in the replication profile.

To select a photo type for downloading:

These instructions assume the Replication Profile Management dialog is open.

1   Double-click the dataclass whose photo download settings you wish to change. The Replication Profile Photo Options dialog containing photo type checkboxes appears.

2   Select the desired photo type checkboxes.
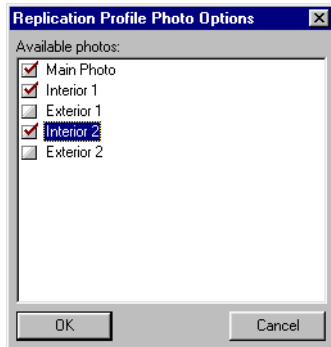
3   Click the **OK** button.
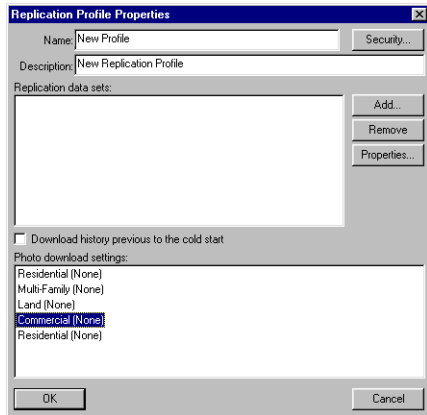
Deleting replication profiles

You can delete any replication profile to which you have adequate security access.

To delete a replication profile:

These instructions assume the Replication Profile Management dialog is open.

1   Select the Replication you want to delete from the Available Replication Profiles window.

2   Click the **Delete** button.

Editing Replication Profiles

You can edit the properties of any replication profile to which you have adequate security access.

To edit a replication profile:

These instruction assume the Replication Profile Management dialog is open.

1   Highlight the replication profile whose properties you want to edit.

2   Click the **Properties** button. The Replication Profile Properties dialog appears.

3   Make any desired changes to the selected replication.

4   When you are finished making changes, click the OK button.
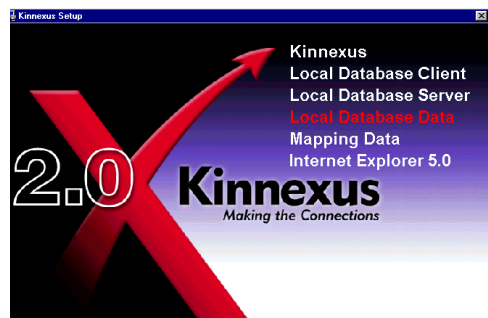
Local Data Setup CDs

Local Database CDs contain data sets from the online database which you can copy to the local database on your computer. Using Local Data Setup CDs saves you the time it takes to copy data directly from the online database during a cold start.

There can be several data sets on each CD, and each data set must be copied separately. When you copy a data set, you automatically copy the replication profile that data set belongs to. You will still need to replicate the replication profile before you will be able to access the data you copied from the CD.

Local Data Setup CDs are created by and can be obtained from your system administrator.

To copy online data using a Local Data Setup CD:

1 Insert the Local Data Setup CD in to the CD-ROM drive of your computer.

2 Click **Local Database Data**.

3 Click the **Next** button.

4 Select the desired data set from the available data sets window. Notice that the replication profile for each data set appears to the right of the data set name.
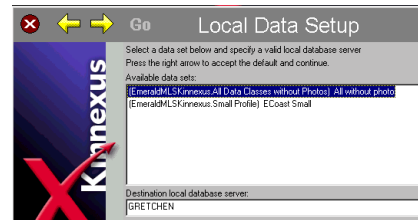
5 Click in the **Destination Local Database Server** field and type the name of the computer on which the local database resides (your computer name, or, if you are part of a network, the name of the network computer on which Local Database Server is installed.)

6 Click the **Next** button.

7 Click the **Go** button to begin the installation.

Chapter 12

Configuration

This purpose of this chapter is to show you how to select and create configurations. A configuration is a group of settings that determines in part how Kinnexus looks and behaves. Your system administrator has created a default configuration, which is the configuration you see when you open Kinnexus for the first time.

You do not have the ability to edit the default configuration, but if you want to use different configuration settings, you can create your own configurations. For example, perhaps you want to add another task icon to the Favorites tab and change the default search results summary view. You can create a configuration containing these settings. You can also modify the configuration settings of any existing configuration to which you have adequate security rights.

In Kinnexus, configurations are made up of seven different configuration settings. These settings are listed in the table below, along the with the page number on which you can find instructions for changing each setting .

Configuration setting	Description	Page number
Quick Search Settings	Quick Searches settings let you create, modify, and delete Quick Searches.	
CMA Settings	CMA settings let you designate default views for CMA-related views.	

Kinnexus configuration settings

Configuration setting	Description	Page number
View Settings	Default View settings let you designate default views for data entry and search views.	
Mapping Settings	Mapping settings let you enable mapping and set map demographic features, map rotation, and zoom.	
Mail Settings	Mail Settings let you choose default mail folder views and attachment types.	
Task Bar Settings	Task Bar settings allow you to add and remove task icons from the Favorites tab.	
Display and Machine Settings	Display and Machine settings allow you to choose which tool bars will be visible when you open Kinnexus. Display settings also let you designate field color.	

Kinnexus configuration settings

Selecting a predefined configuration

It is possible to have several different configurations available, but you can use only one configuration at a time. If you want to use a different configuration than the one that is currently being used, you must select a different configuration from the User Configuration Management dialog. The User Configuration Management dialog contains a list of configurations that have already been defined.

To select an existing configuration:

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2 Click the **Current Configuration** drop-down arrow. A list of existing configuration Displays.

3 Select the desired configuration from the drop-down list.
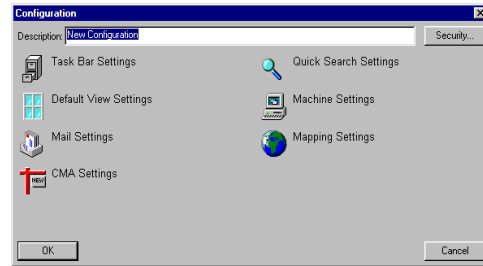
4 Click **OK**.

Creating a new configuration

When you create your own configuration, you determine the default for each of the available configuration settings. You can create as many different configurations as you want.

To create a new configuration:

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.
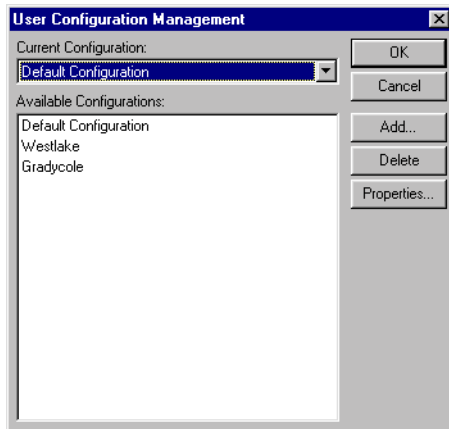
2 Click the **Add** button. The Configuration dialog appears.

3 Click in the **Description** field and type a name for the new configuration.
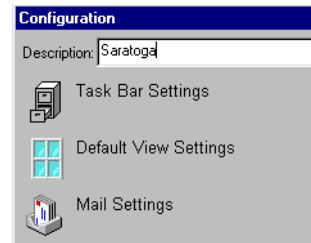
4 Click the button representing the configuration settings you want to set. For example, if you want to set mail settings, click the Mail Settings button.

5 Make the desired changes to the selected configuration settings dialog.

6 When you have made the desired changes, click the **OK** or **Close** button on the open configuration settings dialog.

7 Repeat steps 4-6 for each set of configuration settings you wish to change.

8 Click the Configuration **OK** button.

9 Click the User Configuration Management **OK** button.

Deleting a configuration

You can delete any configuration you have created, and any other configurations to which you have adequate security rights.

To delete a configuration:

1 Click **Tools>Configuration**. The User Configuration Management dialog opens.

2 From the Available Configurations field, select the configuration you want to delete.

3 Click the **Delete** button.

4 Click **OK**.

Editing a configuration

You can edit any configuration you have created, and any other configurations to which you have adequate security rights.

To edit a configuration:

1 Click **Tools>Configuration**. The User Configuration Management dialog opens.

2   From the Available Configurations field, select the configuration you want to edit.

3 Click the **Properties** button.

4   Make any desired changes to the configuration settings.

5 Click the Configuration **OK** button.

6 **Click the User Configuration Management OK button.**

Miscellaneous configuration settings

Misc configuration settings allow you to create new Quick Searches, set general defaults for filter settings, Hot Sheet expiration, and To Do List availability.

Misc configuration settings are set in the Misc Coniguration dialog.
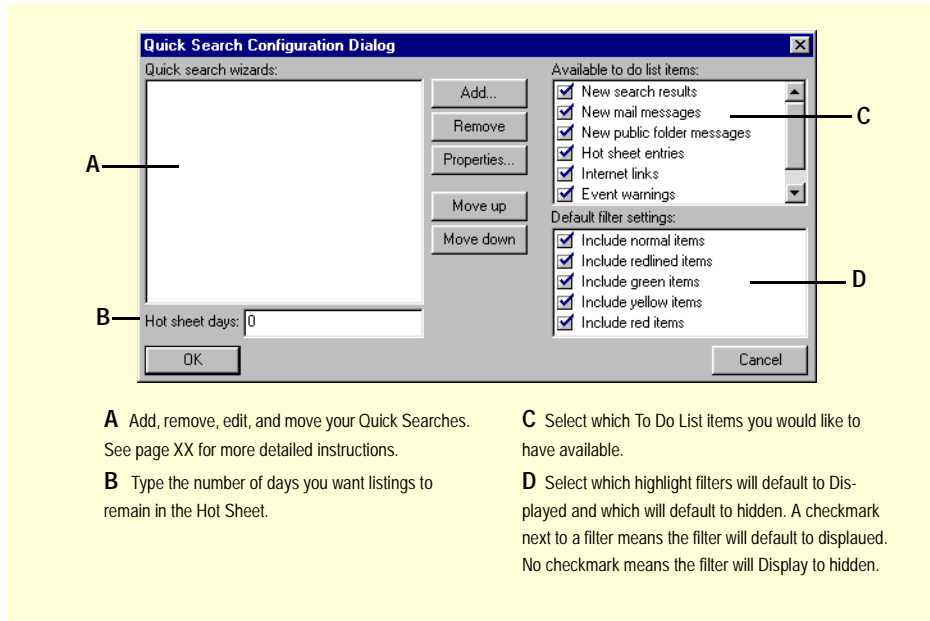
QUICK SEARCH CONFIGURATION DIALOG

To open the Misc COnifguration dialog:

Click Tools>Conifguration

From the Available Configurations window, select teh configuration whose miscellaneous settings you would like to edit.

Click the Properties button

Click the Miscellaneous Settings button..

A Add, remove, edit, and move your Quick Searches. See page XX for more detailed instructions.

B Type the number of days you want listings to remain in the Hot Sheet.

C Select which To Do List items you would like to have available.

D Select which highlight filters will default to Displayed and which will default to hidden. A checkmark next to a filter means the filter will default to displaued. No checkmark means the filter will Display to hidden.

Managing Quick Searches

To create a Quick Search you simply assign Quick Search status to an already existing Wizard. Because the existing Wizard already has a record type associated with it, the Quick Search skips the Search Options page and opens to the first Wizard search

page. Skipping to the Wizard search pages is convenient if you tend to use the same Wizards frequently.

Once you have created a Quick Search, an icon representing the search appears on the Search tab. From then on, all you have to do to open the Quick Search
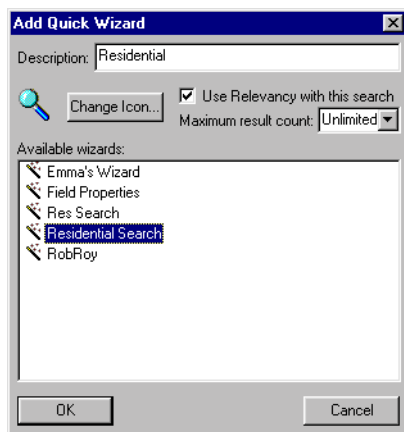
is click the icon. Quick Searches always create temporary, non-replicating searches.

To create a Quick Search:

1 Click **Tools>Configuration**. A list of available configurations appears.

2 From the Available Configurations field, select the configuration in which you want to create a Quick Search.

3 Click the **Properties** button.

4 Click the **Misc Settings** button. The Quick Search Configuration Dialog box containing a list of existing Quick Search Wizards appears.
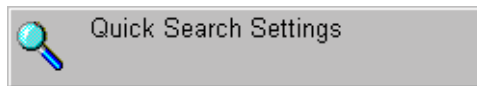
5 Click the **Add** button. The Add Quick Search Wizard dialog appears, containing a list of search Wizards to which you have access.

6 Click the name of the search Wizard you would like to create a Quick Search for.

7 If you would like the Quick Search to use relevancy, select the **Use Relevancy with this search checkbox**.


8 If you want to limit the number of search results, do one of the following:

• Click the **Maximum result count** drop-down arrow and select a number from the drop-down menu

• Click in the **Maximum result count** field and type the desired number.

9 Click the Add Quick Wizard **OK** button.

10 Click the Search Configuration **OK** button.

11 Click the Configuration OK button. A new Quick Search icon appears in the Search tab.

Deleting a Quick Search

1 Click **Tools>Configuration**. A list of available configurations appears.

2 From the Available Configurations field, select the configuration in which you want to create a Quick Search.

3 Click the **Properties** button.

4 Click the **Quick Search Settings** button. The Quick Search Configuration Dialog box containing a list of existing Quick Search Wizards appears.
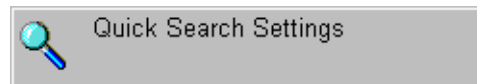
5 From the Quick Search Wizards window, select the Quick Search you want to delete.

6 Click the Remove button.

Editing a Quick Search

1 Click **Tools>Configuration**. A list of available configurations appears.

2 From the Available Configurations field, select the configuration in which you want to create a Quick Search.

3 Click the **Properties** button.

4 Click the **Quick Search Settings** button. The Quick Search Configuration Dialog box containing a list of existing Quick Search Wizards appears.
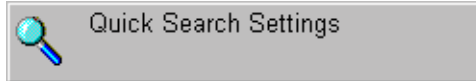

5 From the Quick Search Wizards window, select the Quick Search you want to edit.

6 Click the Properties button.

7 Make the desired changes to the Quick Search settings.

8 Click OK.

View configuration settings

A Beginner's Guide to Kinnexus showed you how to change a summary of search results from a List View to a Comparison View using the Current Form Indicator. But why did the search results open in a List View in the first place? Why didn't the search results open in a Photo Summary View instead? The answer is found in the Default View configuration settings.

Default views for formats like search and creation wizards, summary views, details views, and criteria reports are assigned in the Default View settings dialog.

Let's say that your search results currently open in a List View created by your system administrator. Using the Default View settings, you can choose a different List View as the default view for your search results, or you can select another kind of view instead, such as a photo summary view, or a compar-

ison view. The next time you run a search, your search results will open in the view you selected in the Default View settings dialog.

In the Default Settings dialog, Kinnexus formats are broken into two groups: Data Entry Views, and Search Views. Underneath each category is a list of formats to which you can assign default views:

Format	Example
Creation Wizard	Listing Wizard
Copy Wizard	Copy Listing Wizard
Summary View	Listing Portfolio, User Portfolio, Search Portfolio
Details View	Individual Listing, Individual User

Data Entry Views

Format	Example
Search Wizard	Search Wizard
Criteria Report	Search Criteria Page
Summary View	Search results
Details view	Individual search result

Search views

Selecting a default view

Each format has a drop-down menu containing a list of possible default views for that format. You simply select the view you want to use as the default from the drop-down menu. Default views for different dataclasses must be set separately. For example, you must assign the default view for a commercial criteria report separately from the default view for a detached single family criteria report.

To select a default view:

1 Click **Tools>Configuration.**

2   From the Available Configurations field, select the configuration whose default views you want to change.

3 Click the **Properties** button.

4 Click the **Default View Settings** button.

5   From the Dataclasses window, select the desired dataclass.

6   Click the drop-down arrow of the format whose default view you would like to set. A list of available views Displays.

7   From the drop-down menu, select the view you would like to use as the default.
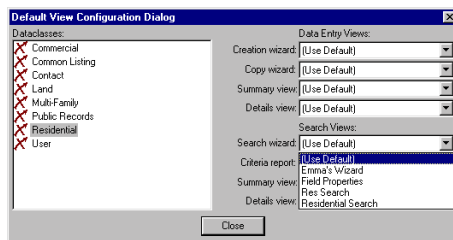
8 Click the Default View Configuration **Close** button.

9 Click the Configuration **OK** button.

10 Click the User Configuration Management OK button.

CMA configuration settings

The CMA Configuration dialog is very similar to the Default View settings dialog, except that instead of setting default views for Data Entry and Search formats, you set default views for CMA formats. The table below lists the six CMA formats to which you can assign a default view.

CMA Format	Example
Creation Wizard	Create CMA Wizard
Search Wizard	CMA search Wizard
Search Wizard	CMA search results
Subject View	Subject property
Adjustment table	Price adjustment table
Presentation	CMA Presentation View

CMA formats

Default views for different dataclasses must be set separately. For example, you must assign the default view of a Commercial subject view separately from the default view of a Residential subject view.

To select a default CMA view:

1 Click **Tools>Configuration**.

2   Select the configuration whose CMA default views you wish to modify.

3 Click the **Properties** button.

4 Click the **CMA Settings** button.
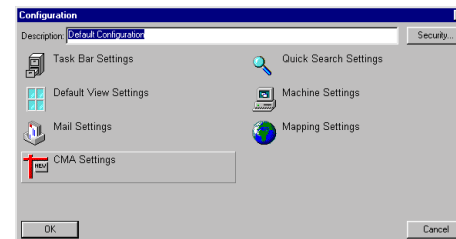
5   Select the desired dataclass from the Dataclasses window.

6   Click the drop-down arrow of the CMA format whose default view you would like to set. A list of available views Displays.
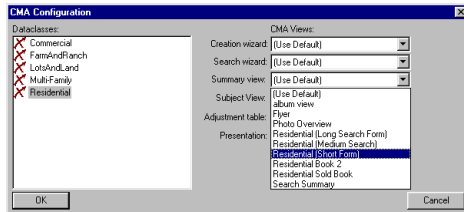
7   From the drop-down menu, select the view you would like to use as the default.

8   Click the CMA Settings **OK** button.

9   Click the Configuration **OK** button.

10 Click the User Configuration Management **OK** button.

Mapping configuration settings

The Mapping Configuration dialog lets you enable mapping, choose feature files, and set default settings for search, overview, and details maps.
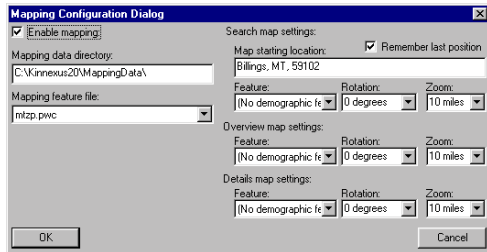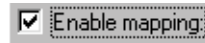

Mapping Configuration dialog

Enable mapping

In order for any of the map features discussed in this chapter to be available, mapping must be enabled. Mapping is enabled and disabled using the Enable mapping checkbox in the Mapping settings dialog. A checkmark in the Enable Mapping field means that mapping is enabled. No checkmark in the Enable Mapping field means that mapping is disabled.

To enable mapping:

1   Click **Tools>Configuration**.

2   From the Available Configurations window, select the configuration whose mapping you want to enable.

3   Click the **Properties** button.

4   Click the **Mapping Settings** button. The Mapping Configuration dialog appears.

5   Place a checkmark in the **Enable Mapping** checkbox by clicking in the checkbox.

To disable mapping:

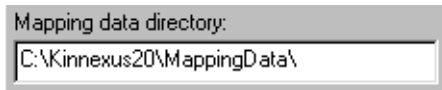**1**   Click **Tools>Configuration** button.

2   From the Available Configurations window, select the configuration whose mapping you want to disable.

3   Click the **Properties** button.

4   Click the **Mapping Settings** button. The Mapping Configuration dialog appears.

5   Remove the checkmark from the **Enable mapping** checkbox by clicking in the checkbox.

Mapping data directory

The mapping data directory is where mapping data is stored on your computer. When you install Kinnexus, a default mapping data directory is selected. If you want to change the default mapping data directory, you use the Mapping Data Directory field in the Mapping Settings dialog

To change mapping data directory:

1   Click **Tools>Configuration**.

2   From the Available Configurations window, select the configuration whose mapping data directory you want to change.

3   Click the **Properties** button.

4   Click the **Mapping Settings** button. The Mapping Configuration dialog appears.

5   In the Mapping Data Directory field, select the current default mapping data directory.
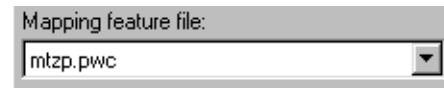
6   Type the new mapping data directory.

```
Mapping data directory:
C:\Kinnexus20\MappingData\
```

7   Click the Mapping Configuration **OK** button.

8   Click the Configuration **OK** button.

9   Click the User Configuration Management **OK** button.

Mapping feature file

Mapping feature files contain demographic information about the geographic areas represented on Kinnexus maps. There are several mapping feature files and each feature file can contain many different demographic statistics, such as household concentration, population density, and property price.

To select the default mapping feature file:

1   Click **Tools>Configuration**.

2   From the Available Configurations window, select the configuration whose default feature file you want to change.

3   Click the **Properties** button.

4   Click the **Mapping Settings** button.

5   Do one of the following:

•   Click in the **Mapping Feature File** field and type the location of the desired feature file.

•   Click the **Browse** button next to the Mapping Feature File field and select the desired feature file.

```
Mapping feature file:
mtzp.pwc
```

6   Click the Mapping Configuration **OK** button.

7   Click the Configuration **OK** button.

8   Click the User Configuration Management **OK** button.

Search, overview, and details map settings

You can set the default map feature, rotation, and zoom for search, overview, and details maps. You can also designate the starting location of search maps and direct Kinnexus to center search maps on the area you searched the last time you used a search map.

Map starting location (search maps only)

Search maps center on the map starting location. You set a starting search map location by entering an address in the Map Starting Location field. An address can consist of a zip code, a city and state, or

even a street address. For example, if you typed 84058 into the map starting location field and opened a search map, it would be centered on the southwest corner of Orem, Utah, where the zip code is 84058. Unless you specify a starting location for your search maps, search maps will open to an over-view of the United States.

To set a map starting location:

1   Click **Tools>Configuration**.

2   From the Available Configurations window, select the configuration whose map starting location you want to change.

3   Click the **Properties** button.

4   Click the **Mapping settings** button.

5   Click in the **Map Starting Location** field and type an address. When you open a search map in Kinnexus it will center on the address you enter.

> Map starting location:
> Billings, MT, 59102

6   Click the Mapping Configuration **OK** button.

7   Click the Configuration **OK** button.

8   Click the User Configuration Management **OK** button.

Remember last position (search maps only)

If the Remember Last Position checkbox is selected, Kinnexus will remember the feature, rotation, and zoom you used the last time you used a search map. When you open a new search map, it will have the same feature, rotation and zoom as the last map you used to search.

To enable Remember last position:

1   Click **Tools>Configuration**.

2   From the Available Configurations window, select the configuration for which you want to enable Remember Last Position.

3   Click the **Properties** button.

4   Click the **Mapping Configuration** button.

5   Place a checkmark in the **Remember Last Posi-tion** checkbox by clicking in the checkbox.

> ☑ Remember last position

6   Click the Mapping Configuration **OK** button.

7   Click the Configuration **OK** button.

8   Click the User Configuration Management **OK** button.

To disable Remember last position:

1   Click **Tools>Configuration**.

2   From the Available Configurations window select the configuration for which you want to dis-able Remember last position.

3   Click the **Properties** button.

4   Click the **Mapping Configuration** button.

5   Remove the checkmark from the **Remember Last Position** checkbox by clicking in the check-box.

6   Click the Mapping Configuration **OK** button.

7   Click the Configuration **OK** button.

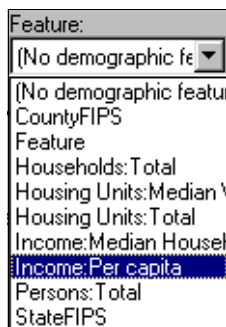**8**   Click the User Configuration Management **OK** button.

Feature

In the Mapping Feature File field you select which file of demographic features to use in your maps. For each type of map (e.g., search, overview, details)

you can select a default demographic feature. The default demographic feature will be Displayed when you first open a map. You can set a different feature for each map type. For example, you can choose a population density feature for overview maps, and a price feature for search maps.

To set default map features:

1 Click **Tools>Configuration**.

2 From the Available Configurations window, select the configuration whose default map features you want to set.

3 Click the **Properties** button.

4 Click the **Mapping** settings button.

5 Click the **Feature** drop-down menu of the desired map type.

6 Select the desired feature from the drop-down menu.

7 Click the Mapping Configuration **OK** button.

8 Click the Configuration **OK** button.

9 Click the User Configuration Management **OK** button.

Rotation

You can rotate all map types by degrees, with 0 being true north. You can either select a rotation

degree from the Rotation drop-down menu, or type a rotation degree directly in the Rotation field.

To set default map rotation:

1 Click **Tools>Configuration**.

2 From the Available Configurations window, select the configuration whose default map rotation.

3 Click the **Properties** button.

4 Click the **Mapping settings** button.

5 Do one of the following:

• Click the **Rotation** drop-down arrow under the desired map type and select the desired rotation from the drop-down menu.

• Click in the **Rotation** field under the desired map type and enter the desired rotation.

6 Click the Mapping Configuration **OK** button.

7 Click the Configuration **OK** button.

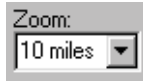8 Click the User Configuration Management **OK** button.

Zoom

You can select a default zoom for each map type. Zoom is measured in miles across. You can either choose a default zoom from the Zoom drop-down menu, or you can click in the Zoom field and type in the desired zoom.

To set default zoom:

1 Click **Tools>Configuration**.

2 From the Available Configurations window, select the configuration whose default zoom you want to set.

3 Click the **Properties** button.

4 Click the **Mapping settings** button.

5 Do one of the following:

• Click the **Zoom** drop-down arrow under the desired map type and select the desired zoom from the drop-down menu.

• Click in the **Zoom** field under the desired map type and enter the desired zoom.

6 Click the Mapping Configuration **OK** button.

7 Click the Configuration **OK** button.

8 **Click the User Configuration Management OK button.**

Mail configuration settings

Mail configuration lets you select a default view for each of your mail folders. You can also select which attachment type you want to use when sending Kinnexus views via email.

Default mail folder views

You can determine the default view for each of your mail folders. The mail configuration dialog contains a list of all your mail folders. Beneath each mail folder is a drop-down field containing a list of possible default views for that folder. To select a new default view for a mail folder, you simply select the desired view from that mail folder's drop-down menu.

To select a default mail folder view:

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2 From the Available Configurations window, select the configuration whose mail folders you would like to assign defaults to.

3 Click the **Properties** button. The Configuration dialog appears.

4 Click the **Mail Settings** button. The Mail Configuration dialog appears.

5 Click the drop-down arrow next to the mail folder whose default view you wish to change.

6 Select the desired view from the drop-down menu.
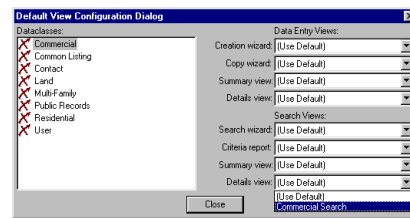
7 Click the Mail Configuration **OK** button.

8 Click the Configuration dialog **OK** button.

9 Click the User Configuration **OK** button.

Selecting an attachment type

When you send a Kinnexus view via email, the current view is attached to a new email message using the attachment type specified in the Mail Configuration dialog.

There are three attachment types you can use when sending Kinnexus views in email.

HTML with server photos

The *HTML with server photos* attachment type attaches the view as an HTML document and each photo in the view as a jpeg. Although each photo in the view must be sent as a separate attachment, the recipient of the attachment only needs to click the HTML view icon in order to open the view and its associated photos. Keep in mind that views contain-

ing several photos may take a long time to send, receive, and open. Online and offline users alike can open this attachment type.

HTML with inline photos

The *HTML with inline* photos attachment type attaches the view as an HTML document, without attaching any photos. When the recipient opens the view, the photos associated with view are retrieved from the KxNet website. The recipient must be online in order to view the photos associated with the view. This attachment type is a good alternative to the *HTML with server photos* type, because it takes less time to send, receive, and open.

No attachment

The *No attachment* type simply sends the view without any photos. Online and offline users alike can open this attachment type.

To select an attachment type:

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2   From the Available Configurations window, select the configuration whose attachment type you like to set.

3 Click the **Properties** button. The Configuration dialog appears.

4 Click the **Mail Settings** button. The Mail Configuration dialog appears.

5 Click the **Attachment Type** drop down arrow.

6 Select the desired attachment type from the drop-down menu.
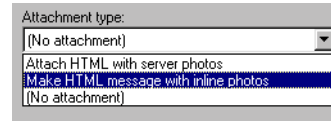
7 Click the Mail Configuration **OK** button.

8 Click the Configuration **OK** button.

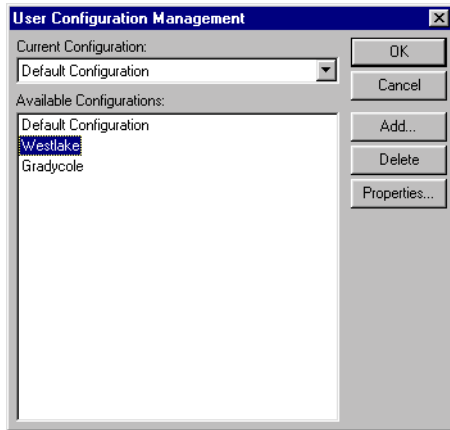**9** Click the User Configuration **OK** button.

Task Bar configuration settings

In the Task Bar Configuration dialog you can add and remove tasks from the Favorites tab. You also designate in what order icons appear in the Favorites tab. You can also determine which tab is open by default when you enter Kinnexus.
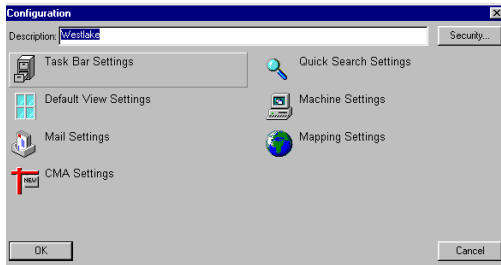
To add a task icon to the Favorites tab:

1 Click **Tools>Configuration**. The User Configuration Management dialog opens.

2   From the Available Configurations dialog, select the configuration whose Favorites tab you want to add a task icon to.
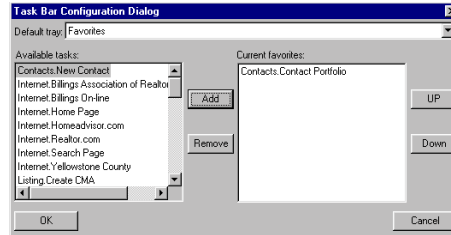

3   Click the **Properties** button. The Configuration dialog opens.

4   Click the **Task Bar Settings** button. The Task Bar Configuration dialog opens.

5   From the Available Tasks window, select the task icon you want to add to the Favorites tab.

6   Click the **Add** button.

7   Repeat steps 5-6 until you have added all the desired tasks.

8   Click the User Configuration Management **OK** button.

9   Click the Configuration **OK** button.

10 Click the Task Bar Configuration **OK** button.

To remove a task icon from the Favorites tab:

1   Click **Tools>Configuration**. The User Configuration Management dialog opens.

2   From the Available Configurations dialog, select the configuration whose Favorites tab you want to remove a task icon from.

3   Click the **Properties** button. The Configuration dialog opens.

4   Click the **Task Bar Settings** button. The Task Bar Configuration dialog opens.

5   From the Current Favorites window, select the task icon you want to remove from the Favorites tab.

6   Click the **Remove** button.

7   Click the User Configuration Management **OK** button.
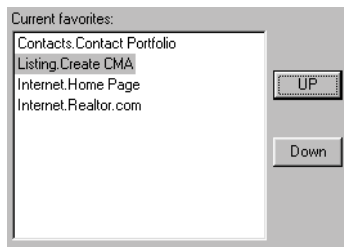
8   Click the Configuration **OK** button.

9   Click the Task Bar Configuration **OK** button.

To reorder task icons on the Favorites tab:

These instructions assume that you currently have more than one task icon in the Current Favorites

field. The order of the task icons in the Current favorites field is the same as the order of the task icons in the Favorites tab.

1 Click **Tools>Configuration**. The User Configuration Management dialog opens.

2 From the Available Configurations dialog, select the configuration whose Favorites tab task icons you want to reorder.

3 Click **Properties**. The Configuration dialog opens.

4 Click the **Task Bar Settings** button. The Task Bar Configuration dialog opens.

5 From the Current Favorites window, select the task icon you want to reorder.

6 Do one of the following:

• If you want to move the task icon up, click the **Up** button. Keep clicking the **Up** button until the task icon is in the desired place.

• If you want to move the task icon down, click the **Down** button. Keep clicking the **Down** button until the task icon is in the desired place.

7 Click the User Configuration Management **OK** button.

8 Click the Configuration **OK** button.

9 Click the Task Bar Configuration **OK** button.

To select a default tab:

1 Click **Tools>Configuration**. The User Configuration Management dialog opens.

2 Select the configuration whose default tab you want to set.

3 Click **Properties**. The Configuration dialog opens.

4 Click the **Task Bar Settings** button. The Task Bar Configuration dialog opens.

5 Click the **Default tray** drop-down arrow. A list of the system tabs appears.

6 Click the desired default tab from the drop-down list. For example, if you want the Search task icons Displayed when you open Kinnexus, select Search from the drop-down list; if you want the Listing icons Displayed when you open Kinnexus, select Listing from the drop-down list.
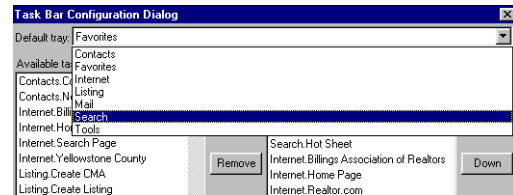
7 Click the User Configuration Management **OK** button.

8 Click the Configuration **OK** button.

9 Click the Task Bar Configuration **OK** button.

Display and Machine configuration settings

Display and Machine settings let you decide which tool bars will default as displayed, and which will default as hidden. You can also set tool bar size, determine data entry field color, and select print highlighting.

Display vs. Machine settings

Although Display and Machine settings are very similar, there is key difference between the two: Display settings affect configurations, while machine settings affect the local machine. Display and Machine settings instructions are listed separately in this chapter.

Display settings

Changes made to the Display settings are changed for all users of that configuration.

Machine settings

Changes made to the Machine settings are stored on your machine—you will not be able to use the settings on another computer. Machine settings override the Display settings of the current configuration. The Machine Settings dialog also has two buttons that do not appear on the Display Settings dialog: Advanced and Logs. The Advanced button deals with transport layer settings, which transport information between your computer and the server. The Logs button keeps track of information transfers in Kinnexus. You should never need to adjust these settings unless your system administrator directs you to.

Visible tool bars

There are eight Kinnexus tool bars that can be hidden or displayed when you open Kinnexus. The Display and Machine Configuration Settings dialogs contain a list of each of these tool bars. Next to the name of each tool bar is a check box. If you place a checkmark in the checkbox next to a tool bar, that tool bar displays when you open Kinnexus. If you leave a checkbox next to a tool bar empty, that tool bar hides when you open Kinnexus.
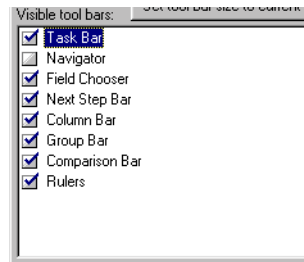
Visible tool bars checkboxes

To select a tool bar for default display (Display):

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2 From the Available Configurations field, select the configuration whose tool bar settings you want to change.

3 Click the **Properties** button. The Configuration dialog appears.

4 Click the **Display Settings** button. The Display Configuration Dialog appears.

5   Place a checkmark in the checkbox next to each tool bar you would like displayed by default.

6   Click the User Configuration Management **OK** button.

7   Click the Configuration **OK** button.

8   Click the Display Settings Configuration **OK** button.

To select a tool bar for default display (Machine):

1   Click **Tools>Machine Settings**. The Display Configuration dialog appears.

2   Select the Machine Default Visible Tool Bars checkbox.

3   Place a checkmark in the checkbox next to each tool bar you would like displayed by default.

4   Click **OK**.

To select a tool bar for default hide (Display):

1   Click **Tools>Configuration**. The User Configuration Management dialog appears.

2   From the Available Configurations field, select the configuration whose tool bar settings you want to change.

3   Click the **Properties** button. The Configuration dialog appears.

4   Click the **Display Settings** button. The Display Configuration Dialog appears.

5   Remove checkmarks from the checkboxes next to each tool bar you want to default as hidden.

6   Click the User Configuration Management **OK** button.

7   Click the Configuration **OK** button.

8   Click the Display Settings Configuration **OK** button.

**To select a tool bar for default hide (Machine):**

1   Click **Tools>Machine Settings**. The Display Configuration dialog appears.

2   Remove checkmarks from the checkboxes next to each tool bar you want to default as hidden.

3   Click **OK**.

Setting tool bar size to current

In *A Beginner's Guide to Kinnexus*, you learned that the size of any tool bar in Kinnexus can be adjusted. However, unless you set the adjusted tool bar widths, they will revert to their original sizes the next time you open Kinnexus.
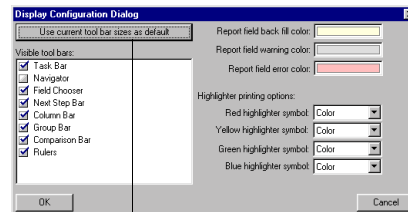
Use current tool bar sizes as default

To save the current tool bar width (Display):

1   Adjust tool bars (e.g., Field Chooser, Next Step Bar, Navigator Tree) to the desired widths.

2   Click **Tools>Configuration**. The User Configuration Management dialog appears.

3   From the Available Configurations field, select the configuration whose tool bar widths you want to save.
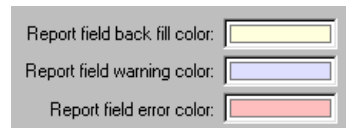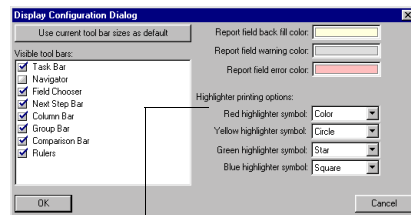
4 Click the **Properties** button. The Configuration dialog appears.

5 Click the **Display Settings** button. The Display Configuration Dialog appears.

6 Click the **Use current tool bar sizes as default** button.

7 Click the User Configuration Management **OK** button.

8 Click the Configuration **OK** button.

9 Click the Display Settings Configuration **OK** button.

To save the current tool bar width (Machine):

1 Adjust tool bars (e.g., Field Chooser, Next Step Bar, Navigator Tree) to the desired widths.

2 Click **Tools>Machine Settings**. The Display Configuration dialog appears.

3 Do one of the following:

• To use the current tool bar sizes, click the Use the Current Tool Bar Sizes as Machine Default button.

• To use the configuration tool bar sizes, click the Use Configuration Tool Bar Sizes button.

4 Click **OK**.

Data entry field color

In chapter XX of this manual you learn about the three data entry field types: Optional, Warning, and Required. The default colors of these fields are yellow, blue, and red, respectively. You can, however, change the default data entry field colors.

|	
Report field back fill color:	
Report field warning color:	
Report field error color:	

Data entry field color

To change data entry field color (Display):

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2 From the Available Configurations field, select the configuration whose data entry field color you want to change.

3 Click the **Properties** button. The Configuration dialog appears.

4 Click the **Display Settings** button. The Display Configuration Dialog appears.

5 Do one of the following:

• If you want to change the color of optional fields, click the **Report Field Back Fill Color** field.

• If you want to change the color of warning fields, click the **Report Field Warning Color** field.

• If you want to change the color of required fields, click the **Report Field Error Color** field.

6 Select a new color for the data entry field using the color control.

7 Click the Display Settings Configuration **OK** button.

8 Click the Configuration **OK** button.

9 User Configuration Management **OK** button.

To change data entry field color (Machine):

1 Click **Tools>Machine Settings**. The Display Configuration dialog appears.

2 Do one of the following:

• If you want to change the color of optional fields, click the **Machine back fill color** field.

• If you want to change the color of warning fields, click the **Machine warning color** field.

• If you want to change the color of required fields, click the **Machine error color** field.

3 Select a new color for the data entry field using the color control.

4 Click **OK**.

Print Highlighting

Print Highlighting lets you determine how highlighted items will appear when they print. If you have a color printer, you can print items in color. If you don't have a color printer, and highlighted items would be obscured or hard to read, you can select symbols to represent the highlighted items. You can also have highlighted items appear as normal items when printed.

Print Highlighting

To select Print Highlighting (Display):

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2 From the Available Configurations field, select the configuration whose print highlighting settings you want to change.

3 Click the **Properties** button. The Configuration dialog appears.

4 Click the **Display Settings** button. The Display Configuration Dialog appears.

5 Click the desired highlighter symbol drop-down arrow.

6 Select the desired symbol from the drop-down menu.

7 Click the User Configuration Management **OK** button.

8 Click the Configuration **OK** button.

9 Click the Display Settings Configuration **OK** button.

To select Print Highlighting (Machine):

1 Click **Tools>Display Settings**. The Display Configuration dialog appears.

2 Select the desired symbol from the drop-down menu. (If you select Default, Kinnexus uses the symbol selected in the Display Configuration Settings.)
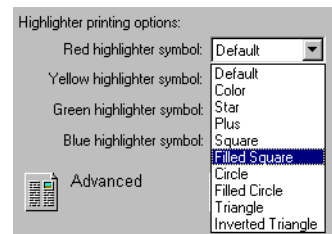
3 Click **OK**.

To deselect Print Highlighting (Display):

1 Click **Tools>Configuration**. The User Configuration Management dialog appears.

2   From the Available Configurations field, select the configuration whose print highlighting you want to change.

3   Click the **Properties** button. The Configuration dialog appears.

4   Click the **Display Settings** button. The Display Configuration Dialog appears.

**5**   Remove the checkmark from the **Print Highlighting** checkbox.

6   Click the User Configuration Management **OK** button.

7   Click the Configuration **OK** button.

8   Click the Display Settings Configuration **OK** button.

To deselect Print Highlighting (Machine):

1   Click **Tools>Machine Settings**. The Display Configuration dialog appears.

2   Remove the checkmark from the **Print Highlighting** checkbox.

3   Click **OK**.

Chapter 12

Sharing Resources

It is possible to share your resources with other groups in your board. Among resources that can be shared are views, replication profiles, user configuration settings, and web links. The easiest way to tell if a resource can be shared is to open its Properties dialog. If you see a button that says Security, it means that the resource can be shared.

Security button

Clicking the Security button brings up the Resource Security dialog. Using the Resource Security dialog, you can determine which groups will have access to your resources, and what kind of viewing and editing rights the group members will have.
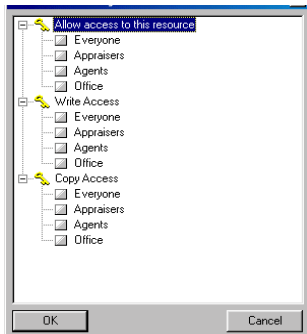
Report Resource Security dialog

Security settings

Access, viewing, editing and other sharing rights are called security settings. Security settings are set in

the Resource Security dialog. The Resource Security dialog contains different security settings depending on what resource you have open. The following tables define each security setting. Because security settings for public folders are unique, they are listed in a separate table.

Security setting	What it allows
Allow access to this resource	Grants any shared group member the right to view your resource.
Write Access	Grants any shared group member the right to make permanent changes to the original resource.
Copy Access	Grants any shared group member the right to make a copy of the resource and edit it on their own computer. Copy access does not allow group members to change the original resource.

General security settings

Security setting	What it allows
Allow posting of new messages	Lets all users subscribed to the public folder to post new messages.
Allow responding to posted messages	Lets all users subscribed to the public folder respond to existing public folder messages.
Allow deleting of owned messages	Lets each user subscribed to the public folder delete messages that he or she has authored.

Public folder security settings

Security setting	What it allows
Allow deleting of messages	Lets each user subscribed tot the public folder delete any messages posted to the public folder.
Allow access to folder properties	Lets all users change the settings in the selected public folder's Properties dialog.

Public folder security settings

Resources that can be shared

The following table contains resources that can be shared among Kinnexus users. Next to each shareable resource is a list of available security settings for that resource.

Shareable resource	Available security settings
List View	• Allow access to resource • Write access • Copy access
Comparison View	• Allow access to resource • Write access • Copy access
Presentation View	• Allow access to resource • Write access • Copy access
Report View	• Allow access to resource • Write access • Copy access
Wizard View	• Allow access to resource • Write access • Copy access
Web Link Properties	• Allow access to resource • Write access
Replication Profiles	• Allow access to resource • Write access
Style Management	• Allow access to resource • Write access • Copy access

Shareable resources and security settings

| Shareable resource	Available security settings
Configurations	• Allow access to resource • Write access • Copy access
Page Layouts	• Allow access to resource • Write access
Public Folders	• Allow posting of new messages • Allow responding to posted messages • Allow deleting of owned messages • Allow deleting of messages • Allow access to folder properties

Shareable resources and security settings

Selecting security settings

Although the following example shows you how to designate security settings for a view, the steps for designating security settings are basically the same for every resource that can be shared. Just remember to look for the Security button on the resource's Properties dialog.

To set security settings for a shared view:

1 Click the **Tools** tray tab.

2 In the Tools tray, click the **View Portfolio** icon.

3 In the View Portfolio, right-click the view whose security settings you would like to modify.

4 Select **Properties** from the right-click menu. The View Properties dialog appears.

5 Click the **Security** button on the View Properties dialog. The Resource Security dialog opens.

6 Click the plus sign next to a security setting you wish to modify. A list of checkboxes will display. Next to each checkbox will be the name of an authorized group.

7 Grant the selected security setting to a group by clicking in the checkbox next to the group's name. A checkmark will appear in the checkbox. Click in the checkbox again to remove the check-

mark and deny group access to the selected security setting.
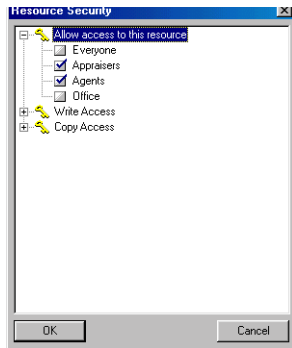
8   Repeat steps 9-10 for each security setting you wish to modify.

9   When you are finished modifying security settings for your shared view, click the **OK** button.

10 Click the OK button on the View Properties dialog.

Chapter 13

Personal, User, and Contact Information

Using Kinnexus you can view and edit your personal information, such as your password or phone number, edit the inventory of users to whose records you have adequate security rights, and create and save contact information about clients and colleagues.

This chapter shows you how to retrieve, view, and edit personal, user, and contact information.

Personal Information page

The personal information page is a data entry page that contains information about the current user. Although your board determines what fields are on the Personal Information page, some fields commonly used on the Personal Information page are Name, Phone Number, and Office. You can edit data in the personal information page fields. For information about entering data into data entry page fields, see page XX.

To open the Personal Information page:

11 Click **Tools>Personal Information**.

Change password

After logging onto to Kinnexus for the first time, you were probably instructed to change your password in order to prevent unauthorized users from getting into and making changes to your inventory. For this same reason, it is recommended that you change your Kinnexus password every 2 or 3 weeks.

To change your password:

1 Click **Tools>Change Password**.

2 Click in the **New Password** field and type your new password.

3 Click in the **Verify Password** field and type your new password again.
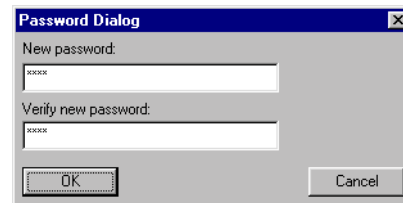
4 Click **OK**.

User Portfolio

It is possible that you have access to inventories other than your own. The User Portfolio contains a list of users whose inventories you have access to. For example, if you have been granted the security rights to add listings for anyone in your office, the name of everyone in your office appears in the User Portfolio.

The User Portfolio is a list view. If you double click a user record in the User Portfolio, that user's Personal Information page opens. Below the Personal Information page on the Next Step Bar are icons representing the selected user's portfolios. To view or modify the contents of a user's inventory, click the desired portfolio icon.

To open the User Portfolio:
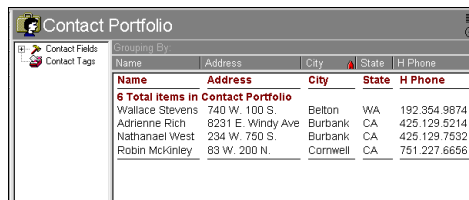
1 Click **Tools>User Portfolio**.
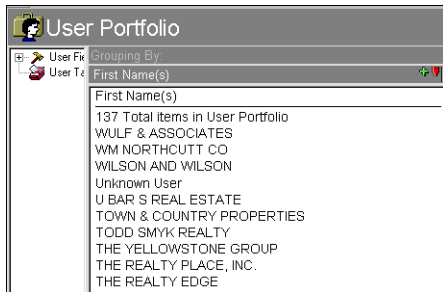
Contact Portfolio

A contact is a record containing information about a client or colleague. Contacts can record names, phone numbers, addresses, notes, and other contact information. The Contacts Portfolio ia a view containing a list of your contacts.

To open the Contacts Portfolio:

1 Click **Contacts>Contact Portfolio**.

Create Contacts

A contact is a record containing information about a client or colleague. A create contact wizard takes you through the steps of creating a new contact. Once you have created a contact, it is stored in your Contacts Portfolio.

To create a new contact:

1 Click **Contacts>Create Contact**.

2 Fill the desired wizard fields with information about the contact.
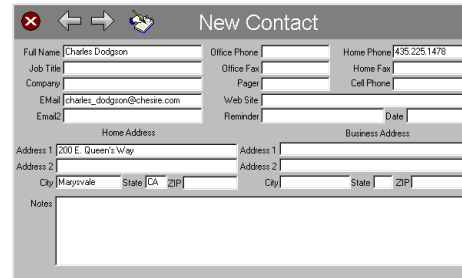
3 Click the **Finish** button.

4 Enter any additional information on the Contact Information data entry page.
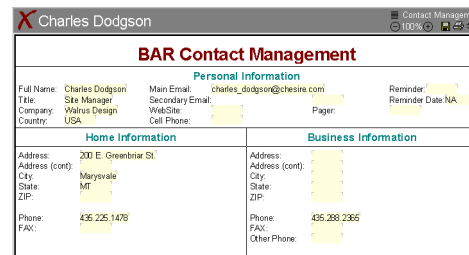
5 Click the **Save** button on the toolbar.

Appendix A

Operators and Functions

This appendix lists each operator and function used in Kinnexus expressions. You can look up the definition of any Kinnexus operator or function and find examples of how each term can be used in an expression.

For more help with operators, functions, and other-expression terms, see *Chapter 4: Expressions*.

Operators

Operators let you combine terms within an expression. The following table defines each operator, shows you the correct operator symbol to use in expressions, and provides an example of each available operator being used in an expression.

Operator	Symbol	What it does	Example
Addition	+	Adds two terms together. If the terms are integers, Kinnexus adds the two terms together. If the terms are text strings, second string is added to the end of the first string.	common.listprice+10= 200,010 common.street+Blvd= SundanceBlvd
Subtraction	-	Subtracts two numeric terms and returns a signed number.	common.listprice-100= $190,000
Multiplication	*	Multiplies two numeric terms together and returns a signed number.	common.numberbedrooms* 5= 15
Division	/	Divides two numeric terms and returns a signed number. Divides the first number by the second number.	common.listprice/common.soldprice= .95
Mod	%	Divides two numeric terms and returns the remainder.	25%7= 4
Boolean	==	Compares two terms and returns a 'True' statement if the terms are true.	Other.photomain=Other.photoexterior= True
Less than	<	Compares two terms and returns a 'True' statement if the first term is less than the second term.	common.numberbathrooms<common.numberbedrooms= True
Greater than	>	Compares two terms and returns a 'True' statement if the first term is greater than the second term.	common.soldprice>common.listprice= True

Operators

Less than equals	<=	Compares two terms and returns a 'True' statement if the first term is less than or equal to the second term.	common.numbedrooms<=common.numberbathrooms= True
Greater than equals	>=	Compares two terms and returns a 'True' statement if the first term is less than or equal to the second term.	common.listprice>=common.price= False
Not equals	<>	Compares two terms and returns a True statement if the first expression is not equal to the second expression.	residential.bedsbasement<>residentialbedsmain= True
And	&&	Compares two Boolean terms and returns a 'True' value if both the first and second Boolean terms are true.	(common.listprice>100000)&&(common.soldprice<200000)= True
Or	||	Compares two Boolean terms and returns a 'True' value if either the first or second Boolean term is true.	(residential.numberbathrooms>4)||(residential.numberbed-rooms>= False
Not	!	Switches the value of a Boolean term. For example, If a term is true it is returned as false.	other.exteriorphoto= False

Operators

Functions

Functions are calculation tools that help you retrieve and manipulate Kinnexus data. The purpose of this reference is to define each of the functions available and provide examples of how each function might be used in Kinnexus.

For a basic description of functions and what they do, see pageXX.

How function descriptions are organized

To help you find the right function for your needs, function descriptions follow this format:

• **Name** The name of the function as you type it into Kinnexus Expression fields.

• **Return value** What the function returns, or what command or action the function performs.

• **Syntax** The name of the function and all required arguments in the correct order.

• **Arguments** A description of each argument in the function.

• **Examples** One or more examples showing you how to use the function.

Functions calling for 'datepart'

In functions that calculate dates, you may be asked to enter a datepart. A datepart specifies the time unit in which the difference between two dates is measured. For example, you can choose to calculate the time between two dates in days, weeks, months, or years. Dateparts must be entered between quotation marks. See the *@DateAdd* function description on page XX for an example of how datepart is used in expressions.

The following table shows you how date parts should be entered into functions:

Datepart	What it does
"ss"	Calculates the difference seconds
"mm"	Calculates the date difference in minutes
"hh"	Calculates the date difference in hours
"dd"	Calculates the date difference in days
"mm"	Calculates the date difference in months
"qq"	Calculates the date difference in quarters
"yy"	Calculates the date difference in years

Dateparts

Function Reference

@Average

Returns the average value for the specified field within a dataclass.

Syntax

@Average("dataclass", "expression. . .")

"Dataclass" is the dataclass from which you want the average value returned.

"Expression" is the field you want the value to come from.

Example

The following example returns the average price for residential properties.

@Average("Residential", "common.Price")= $235,000.00

@Average

Returns the average value for the specified field within the current data set.

Syntax

@Average("expression", "inclusion expression")

"Expression" is the field you want the value to come from.

"Inclusion expression" is the filter you want to place on the expression.

Example

This example returns the average price for Active properties within the current data set, assuming the active status value is one.

@Average("common.Price", "common.status=1")= $750,000.00

@Bool

Converts the expression within the parentheses to a Boolean value.

Syntax

@Bool(value)

value is the expression you want to convert to a Boolean value.

If *value*'s data type is:

• Integer or Real -- Blank fields or fields containing the value of 0 are cast to False. All other values are cast to True.

• Text -- Text values starting with a 'T' or 'Y' are are cast a s True. All other values are cast as False.

Examples

@Bool(0)= False

The following example assumes that there is a value in the Fireplace Basement field that is not 0.

@Boolean(Residential.FireplaceBasement)= True

@Office()= False

@Case

Returns a conditional value based on a variable integer value.

Syntax

@Case(value, value0, value1, value2. . . .)

Value is an expression that evaluates to an integer.

Value0 is the expression returned if *value* evaluates to 0.

Value1 is the expression returned if *value* evaluates to 1

Value2 is the expresion returned if *value* evaluates to 2.

Note: You can include as many return expressions as you want.

Example

The following example returns the days on market value for a Active listing whose list date was 06/29/99 and assuming the current date is 08/01/99. In order to get this value, the expression contains the integer condition value *common.status*, and a unique days on market expression for each status. Because Active has a status value of 1, Kinnexus skips to and evaluates the expression in the 1st position.

*@case(common.status, 0, **@datediff ("dd", @currentdate, common.listdate**), @datediff ("dd", @currentdate, common.listdate), @datediff ("dd", common.contractdate, common.listdate), @datediff*

("dd", common.contractdate, common.listdate), @datediff ("dd", common.solddate, common.listdate), @datediff ("dd", common.lastmod, common.listdate), @datediff ("dd", common.lastmod, common.listdate)) = 34

@Changed

Returns a 'True' value if a record has been changed since the last time the search has been run, or a 'False' value if a record hasn't been changed since the last time the search has been run.

Syntax

@Changed( )

Example

The following example returns a changed value for a record that has been changed since the last time the search was run.

@Changed()= True

@Count

Counts the number of records for the specified field within a certain dataclass.

Syntax

@Count("dataclass", "expression". . .)

"Dataclass" is the dataclass from which you want the count returned.

"Expression" is the value whose records you want to count.

Example

The following example counts the number of commercial listings in area 08.

@Count("Commercial", "common.area", "08")= 17

@Count

Counts the number of records for the specified field within the current data set.

Syntax

@Count("Inclusion expression")

"Inclusion expression" is the value whose records you want to count.

Example

The following example counts the number of sold listings in the current data set, assuming the sold status value is 5.

@Count("common.Status=5")= 14

@CurrentDate

Returns the current date in the default date format.

Syntax

@CurrentDate( )

Example

This example assumes that the current date is June 23rd, 2000.

CurrentDate( )= 06/23/00

@DataClass

Returns the name of a record's dataclass.

Syntax

@DataClass( )

Example

@Status( )= Residential

@DateAdd

Returns a new date value based on adding an interval to the specified date.

Syntax

@DateAdd(unit, date, value)

Unit is the datepart -- the parameter that specifies on which part of the date to return a new value (e.g., months, days, hours, etc.).

Date is an expression that returns a datetime value, such as a date field, or a date text string.

Number is the value used to increment the unit (e.g., *4* days, *3* years, *18* weeks, etc.)

Example

The following example adds 14 days to a record whose list date is 4/08/99.

@DateAdd("dd", Common.ListDate, 14)= 4/22/99

@DateDiff

Returns the number of date and time boundaries crossed between two specified dates.

Syntax

@DateDiff(unit, date1, date2)

Unit is the datepart -- the parameter that specifies on which part of the date to calculate the difference (e.g., months days, hours, etc.).

Date1 is the beginning date for the calculation.

Date2 is the ending date for the calculation.

Example

The following example returns the number of months an active listing has been on the market.

@DateDiff("mm", common.currentdate, common.listdate)= 4

@DatePart

Returns the specified datepart of a date.

Syntax

@Datepart(unit, date)

Unit is the datepart you want returned.

Date is the date from which you want to extract a datepart.

Example

The following example returns the month datepart for a listing with the listing date value of '08/27/99'.

@DatePart("mm", Common.ListDate)= 08

@DateTime

Converts the text string within parentheses to a date/time value. The DateTime function is only useful if the text string is written in date format.

Kinnexus stores dates in the standard Microsoft Date/Time format in 4 bytes. It accommodates all dates up to the year 9999.

Syntax

@DateTime(value)

Value is the expression you want to convert to a date/time value.

If *value*'s data type is:

• Text - Casting a text field to a time date is possible if the formatting of the date string is correct. If the format is not correct, the result of the cast will be zero. The correct format is to specify a month and date value with a space or designation between the numbers. Kinnexus assumes the current year if the year is not specified.

Examples

The following examples convert the various text strings into dates.

@DateTime("Nov 20, 1999")= 11/20/99

@DateTime("June 29, 00")= 6/29/00

@DateTime("5 9 98")= 5/9/98

@DownCase

Converts all uppercase letters in a text string to lowercase.

Syntax

@DownCase(string)

String is the text you want to convert to lowercase.

Example

The following example returns an all lowercase value for the text string 'ROSEWOOD Drive'

@DownCase("ROSEWOOD Drive")= rosewood drive

@Find

Returns the position number of a specified character in a text string starting from 0.

Syntax

@Find(string, substring)

String is the text string containing the specified character.

Substring is the specified character whose position number within the string you want to find.

Example

This example searches for the position number of the letter 'd' in the string 'withdrawn'.

@Find("withdrawn", "d")= 4

@ForeignDescription

Forthcoming. . .

FormatDate

Formats a date value according to the specified format arguments.

Format arguments

Format argument	What it means
%a	Abbreviated weekday name
%A	Full weekday name
%b	Abbreviated month name
%B	Full month name
%c	Date and time representation approriate for lovale
%d	Day of month as decimal number (01-31)
%H	Hour in 24-hour fromat (00-24)

Format arguments

Format argument	What it means
%I	Hour in 12-hour format (01-12)
%j	Day of year as deciml number (001-366)
%m	Month as decimal number (01-12)
%M	Minute as decimal number (00-59)
%p	Current locale's A.M/P.M indicator for 12-hour clock
%S	Second as decimal number (00-59)
%U	Week of year as decimal number, with Sunday as first day week (00-53)
%w	Weekday as decimal number (0-6; Sunday is 0)
%W	Week of year as decimal number, with Monday as frist day of week (00-53)
%x	Date representation for current locale
%X	Time representation for current locale
%y	Year without centruy, as decimal number (00-99)
%Y	Year with century, as decimal number
%z	Time-zone name or abbreviation; no character if time zone is unknown
%%	Percent sign

Format arguments

Syntax

@FormatDate(Datetime, FormatString)

Datetime contains the format argument(s) that specify which date elements you want to use in the format. *Datetime* must appear between quotation marks.

FormatString is the date value you want to format.

Example

The following example converts a Sold Date field with the date value of '08/01/99' into Weekday Name, Month Name, Day of Month, and Year with Century format.

@FormatDate ("%A %B %d ,%Y" , Common.Sold-Date)= Sunday August 01, 1999

@GeoCode

Takes a string containing address information and creates values for the latitude and longitude fields.

Syntax

@GeoCode(*string*)

String is the address string needed to evaluate a property's latitude and longitude.

Example:

@GeoCode(common.Street# common.StreetName, common.city, common.state, common.zip)

@Highlight

Returns a record's numeric highlighter value.

Numeric highlighter values

Highlighter style	Highlighter value
Normal	0
Red	1
Yellow	2
Green	3
Redlined	4

Numeric highlighter values

Syntax

@Highlight()

Example

The following example returns the numeric highlighter value for a record highlighted in green.

@Highlight()= 3

@Info

Forthcoming. . . .

@Integer

Converts the expression within the parentheses to an integer value.

Syntax

@Integer(value)

value is the expression you want to convert to an integer.

If *value*'s data type is:

• Boolean -- casting a Boolean field to an integer results in a '1' if the Boolean field is True, or a '0' if the Boolean field is False.

• Text -- The result of casting a text field to an integer varies depending on the text string. If the text string is a number, the result of the case is the integer portion of the text. If the string has characters in it, and starts with 'T' or 'Y' the value casts to '1'. Otherwise, the text value is '0'.

• Real -- Casting a real number to an integer results in the integer part of the amount. No pennies are included.

Example

The following example shows a currency field containing $325,000.00 being cast to an integer. Notice that commas, currency symbols, and decimal points are removed.

@Integer(Common.SoldPrice)= 325000@Status()= 4

@IsNull

Returns a 'Yes' value if data has never been entered for a field, or a 'No' value if data has been entered for a field.

Syntax

@IsNull(value)

Value is the field into which data has or has not been entered.

Example

The following example returns a value for the Dishwasher field, which has never had any data entered into it.

@IsNull(residential.dishwasher)= Yes

Latitude

Returns a property's latitude.

Syntax

@Latitude( )

Example

@Latitude( )= 45669152

@Left

Returns the first (or leftmost) character or characters in a string.

Syntax

@Left(string, number)

String is the text string containing the characters you want to extract.

Number specifies how many characters you want returned.

Example

The following example returns only the 5 leftmost characters from the text string 'Moorhead'.

@Left("Moorhead", 5)= Moorh

This example returns only the 4 leftmost characters from the city field with the value of 'Fargo'.

@Left(Common.City, 4)= Farg

@Length

Returns the number of characters in a text string.

Syntax

@Length(string)

String is the text string containing the characters you want to count.

Examples

The following example returns the number of characters (including spaces) in the text string 'Rodeo Drive'.

@Length("Rodeo Drive")= 11

This example returns the number of character in the City field containing the value of 'Fairview'

@Length(Common.City)= 8

Longitude

Returns a property's longitude.

Syntax

@Longitude()

Example

@Longitude()= 108770848

LookUpKey

The LookUpKey function is only useful in Import-Studio. See the *Administrator's Manual* for more information about this function.

@Max

Returns the maximum value for the specified field within a dataclass.

Syntax

@Maximum("dataclass", "expression. . .")

"Dataclass" is the dataclass from which you want the maximum value returned.

"Expression" is the field you want the value to come from.

Example

The following example returns the maximum price for residential properties.

@Average("Residential", "common.Price")= $800,000.00

@Max

Returns the maximum value for the specified field within the current data set.

Syntax

@Max("expression", "inclusion expression")

"Expression" is the field you want the value to come from.

"Inclusion expression" is the filter you want to place on the expression.

Example

This example returns the maximum price for an Active property in the current data set, assuming the active status value is one.

@Max("common.Price", "common.status=1")= $750,000.00

@Mid

Returns a specific number of characters from a text string, starting at the position you specify.

Syntax

@Mid(string, number, number)

String is the text string containing the characters you want to extract.

Number is position of the first character you want to extract from the text string.

Number specifies how many characters to return from the text.

Example

The following example removes the first 10 characters from the text string and then displays the next 7 characters.

@Mid("Rockville Springs", 10, 7)= Springs

@Min

Returns the minimum value for the specified field within a dataclass.

Syntax

@Min("dataclass", "expression. . .")

"Dataclass" is the dataclass from which you want the minimum value returned.

"Expression" is the field you want the value to come from.

Example

The following example returns the average price for residential properties.

@Average("Residential", "common.Price")= $73,000.00

@Min

Returns the minimum value for the specified field within the current data set.

Syntax

@Min("expression", "inclusion expression")

Expression is the field you want the value to come from.

"Inclusion expression" is the filter you want to place on the expression.

Example

This example returns the minimum price for an Active property, assuming the active status value is one.

@Min("common.Price", "common.status=1")= $65,000.00

@MixedCase

Capitalizes the first letter in the text string and converts all other letters to lowercase.

Syntax

@MixedCase(string)

String is the text string you want to partially capitalize.

Example

The following example partially capitalizes the text string 'turn right at Tyson's Corner'.

@MixedCase("turn right at Tyson's Corner")= Turn right at tyson's corner

@Null

Sets the value of a field to null

Syntax

@Null(value)
Value is the value you want to set to null.

Example

This example nulls the value in the Sold Listing field.

@Null(common.SoldPrice)

@Money

Converts the expression within the parentheses to a currency value.

Syntax

@Money(value)

Value is the expression you want to convert to a currency value.

If *value*'s data type is:

• Boolean -- Casting a Boolean field to a money field results in '$1.00' value if the boolean field is true, in '$0.00' if the field is false.

• Real - Casting a real number to a money field results in same value. Any digits less significant than a penny are truncated.

• Integer - Casting an integer to a money field results in the same numeric value.

• Text - The result of casting a text field to a money value varies depending on the text string. If the text string is a number, the result of the cast is the value of the number. If the text has characters in it, and the the text field starts with a 'T' or a 'Y', the value casts to $1.00. Otherwise the text value is $0.00.

Example

The following example casts an integer value of 3 in the Basement Bedrooms field into a money value.

@Money(Residential.BasementBedrooms)= $3

@Office

Returns a 'True' value if a record belongs to the current users's office, or a 'False' value if a record does not belong to the current user's office.

Syntax

@Office()

Example

The following example returns an office value for a record that does not belong to the current user's office.

@Personal

Returns a True value if a record belongs to the current user, and a False value if a record does not belong to the current user.

Syntax

@Personal()

Example

The following example returns a personal value for a record that belongs to the current user.

@Personal()= True

@PhotoCount

Returns the number of photos associated with a record.

Syntax

@PhotoCount()

Example

@PhotoCount()= 3

@Real

Converts the expression within the parentheses to a real value.

Syntax

@Real(value)

Value is the expression you want to covert to a real value.

If *value*'s data type is:

• Boolean -- Casting a Boolean field to a real number results in '1.0' if the Boolean field is True, or a '0' if the Boolean field is False.

• Text -- The results of casting a text field to an integer varies depending on the text string. If the text string is a number, the result of the cast is the number. If the text has characters in it, and the text field starts with a 'T' or 'Y', the value casts to a '1'. Otherwise, the text value is '0'.

• Integer -- Casting an integer to a real number results in the same number.

• Money -- Casting a money field to a real number removes currency symbols and commas from the value.

Example

The following example casts a $295,000 currency value in the List Price field to a real value.

@Real(Common.ListPrice) =295000.0000

@Relevancy

Returns the percentage of relevancy points a record received, compared to the total available relevancy points.

Syntax

@Relevancy()

Example

@Relevancy()= 75%

@Right

Returns the last (or rightmost) character or characters in a string.

Syntax

@Right(string, number)

String is the text string containing the characters you want to extract.

Number specifies how many characters you want to extract.

Examples

The following example returns only the 3 rightmost characters in the text string 'Hearthside'.

@Right("Hearthside", 3)= ide

This example returns only the 4 rightmost characters from the Street field containing the value of 'Sundowner Blvd'.

@Right(Common.Street, 4)= Blvd

@Status

Returns a record's numeric status value.

Status values

Status	Status value
Pre-active	0
Active	1
Hold	2
Contingent	3
Pending	4
Sold	5
Expired	6
Withdrawn	7

Status values

Syntax

@Status( )

Example

This example returns a numeric status value for a Pending record.

@Status( )= 4

@StripVowels

Removes all vowels from a text string.

Syntax

@StripVowels(string)

String is the text string from which you want to remove vowels.

Example

The following example strips the vowels from the value in the City field, which in this example is 'Hearthside'.

@StripVowels(common.city)= Hrthsd

@StripWhiteSpace

Removes all spaces from the text string.

Syntax

@StripWhiteSpace(string)

String is the text from which you want spaces removed.

Example

This example removes all spaces from the text string 'Forest River Rd'.

@StripWhiteSpace("Forest River Rd")= ForestRiv-erRd

@Sum

Returns the sum value for the specified field within a dataclass.

Syntax

@Min("dataclass", "expression. . .")

"Dataclass" is the dataclass from which you want the sum value returned.

"Expression" is the field you want the value to come from.

Example

The following example returns the sum price for residential properties.

@Sum("Residential", "common.Price")= $4,225,300.00

@Sum

Returns the sum value for the specified field within the current data set.

Syntax

@Sum("expression", "inclusion expression")

"Expression" is the field you want the sum value to come from.

"Inclusion expression" is the filter you want to place on the expression.

Example

This example returns the sum price for Active properties within the current data set, assuming the Active status value is one.

@Sum("common.Price", "common.status=1")= $1,328,000.00

@Text

Converts the expression within the parentheses to a text value.

Syntax

@Text(value)

Value is the expression you want to convert to a text value.

If *value*'s data type is:

• Boolean -- Casting a Boolean value to a text value results in the word 'True' if the Boolean value is true, or in the word 'False' if the Boolean value is False.

• Real -- Casting a real number to a text value results in a text string of the number.

• Integer -- Casting an integer to a text value results in a text string of the number.

• Money -- Casting a money value to a text value results in a text string of the amount.

Example

The following example casts an integer value of 4 in the number bedrooms field to a text field. There is no visual difference between the integer and text value.

@Text(Common.NumberBedrooms)= 4

@TrimLeft

Removes any white space from the beginning of the text string within the parentheses.

Syntax

@TrimLeft(string)

String is the text string from which you want to remove white space.

Example

This example shows you an expression in which the trimleft function was not used, and then shows you the trimleft function used with the same expression.

Without Trim left function:

"" +" " + "Sale" = * Sale*

With TrimLeft function:

"" @TrimLeft (" " + "Sale")= *Sale*

@TrimRight

Removes any white space from the end of the text string within the parentheses.

Syntax

@TrimRight(string)

String is the text string from which you want to remove white space.

Example

This example shows you an expression in which the trimright function was not used, and then shows you the trimright function used with the same expression.

Without TrimRight function:

" " + "Sale"+"" = Sale **

With TrimRight function:

@TrimRight("Sale"+" ")+ "" = Sale**

@Truncate

Removes all decimal characters from a real number, or returns a specific number of decimal points from a real number, starting at the position you specify.

Syntax

@Truncate(number)

OR

@Truncate(number, number)

Number is the real number containing decimal characters you want to remove.

Number is the number of decimal characters you want to remain in the real number.

The following example removes all decimal characters form the real number '2.3434'

@Truncate(2.3434)= 2

This example leaves one decimal point in the real number '1.2345'.

@Truncate(1.2345, 1)= 1.2

@UpCase

Returns a text string in all capital letters

Syntax

@UpCase(String)

String is the text string you want to change to all capital letters.

Examples

The following example returns the text string 'Sold' in all capital letters.

@Upcase("Sold")= SOLD

This example returns the text value 'remax' from the Agency field in all capital letters.

@UpCase(Common.Agency)= REMAX