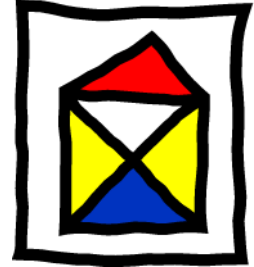


# 6



## Lists

Lists serve several roles in PRIMO. They appear in various forms and in the following instances:

- they list Activities on the *Activities page* of the Organisation, Property and Requirement records,
- they list search results in *Search and List windows*,
- they list matched Properties and Requirements in the Matching section of Property and Requirement records.

The essential qualities of these lists are the same. *Search and List windows* are the most powerful and flexible type of list windows, with the widest range of functions. This is why Property and Requirement match lists can be copied into *Search and List windows*.

Due to the fact that they contain addresses, *Organisation and Contact Search and List windows* allow you to create mailings and labels directly from the list.

This chapter describes:

- list layouts (adding and removing columns, adjusting column width, sorting and changing column position),
- how to save, open, print and export lists,
- the additional mailing and label printing functions available for Organisation and Contact lists.

## List Toolbar

The list section of a *Search and List window* has its own toolbar:



**Fig. 6-1:** List Toolbar

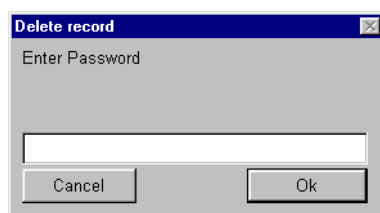
The meaning of each toolbar icon (from left to right) is as follows:

- Reduce selected rows,
- Reverse selected rows,
- Delete record,
- Print list,
- Print mailshot (only available with Organisation and Contact lists),
- Print labels (only available with Organisation and Contact lists),
- Open pop-up menu (leads to further list commands).

The meaning of the icons also appears as micro-help in the PRIMO status bar (cf. [section entitled “Micro-help”, Chapter 1, “Basic Functions”, page 1-40](#)).

## Deleting a Record

1. Select the appropriate record and click on the “rubbish bin” icon.  
The following dialogue box opens:



**Fig. 6-2:** Dialogue Box: “Delete Record”

2. Enter the delete password and click on "OK".  
In order to prevent inadvertent deletion of a record, another dialogue box opens asking you to confirm your decision:



**Fig. 6-3:** Dialogue Box Confirming Record Deletion

3. Do not confirm the deletion of a record until you are certain you are deleting the correct one.  
Deleted records cannot be recovered.



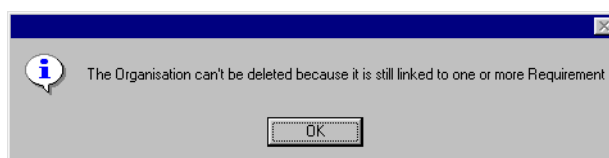
**Important:**

For an alternative to deleting records, see the [section entitled “Changing Record Status Instead of Deleting”, Chapter 1, “Basic Functions”, page 1-38.](#)



**Tip:**

An Organisation record linked to Property or Requirement records cannot be deleted. When you try to delete a linked Organisation record, you will get the following message:



**Fig. 6-4:** Message: “Cannot Delete Linked Record”

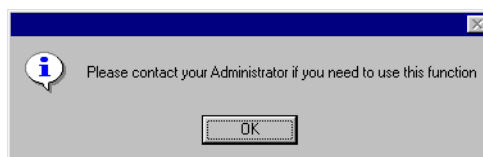
Before you can delete an Organisation record, you must remove any links it may have with Property or Requirement records. A Property record may be linked to an Organisation record through a Contact.

## Printing a List



**Tip:**

It is the Program Administrator who decides which user may print lists. If you are not authorised to print a list, the print and export options in the *Search and List window* list toolbar will not be available to you. If you select “Print...” from the File menu, you will get the following message:



**Fig. 6-5:** Message Informing User to Contact Program Administrator

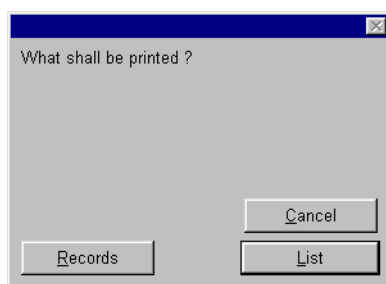
To print a list follow the steps below:

- ✓ **Prerequisite:**  
You have opened a *Search and List window*, have conducted a search and the results are now listed. Or, you have opened a saved search list instead of conducting a new search.

You have configured the list to look the way you would want to see it on paper.

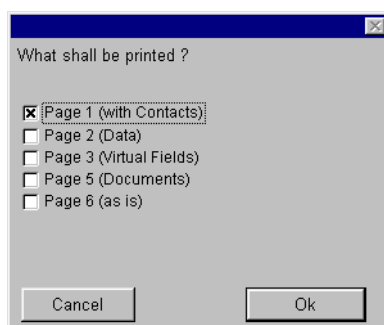
1. Click on the “Print” icon on the list toolbar.

The following dialogue box will open:



**Fig. 6-6:** Dialogue Box: “What shall be printed?”

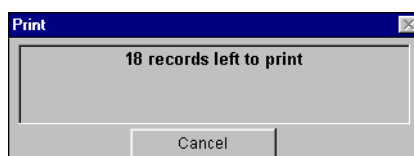
2. Choose whether you would like to print every record in the list or the list itself. Depending on your selection, either the records or the list will be printed.
3. If you have chosen to print the records in the list, you will be asked which page(s) you wish to print:



**Fig. 6-7:** Dialogue Box: “What Shall be printed?”

You can choose to print more than one page.

If the printing job you have started is an extensive one, a dialogue box will open giving you a countdown of the records still to be printed.



**Fig. 6-8:** Dialogue Box: “... left to print”

4. You can cancel the print job at any time once the "countdown" dialogue box appears. How long it takes to print really depends on the printer you are using and the printer installation. For instance, if a spooler is involved, extensive print jobs can be sent off to the printer quite quickly. Exactly when the print job occurs depends on whether other print jobs are already waiting in the printer queue.

→ **Tip:**

When printing records from a list, remember to select and then reduce the records you wish to print. If not, the printer will print all the records in the list since it does not discriminate between selected and unselected records.

## Working with Lists

→ **Tip:**

Lists are printed the way they are formatted. It is therefore important to make sure that the list is formatted the way you want it to appear before you print a hard copy.

The following options are available to help you format lists:

- Adding and removing columns,

- Multi-line or single-line list entries,
- Grid or no grid,
- Adding and removing rows,
- Specifying the sorting order,
- Changing column position,
- Changing column widths.

→ **Tip:**

You can save a lot of time by formatting the lists before retrieving the data. This is because PRIMO will reload all the rows whenever you add or remove a column from the list.

## Creating a List

Lists are created in the following instances:

- When Activity records are added to the *Activities page* of Organisation, Property and Requirement records. The last page of these records shows a list of all Activities linked to these records.
- as a result of a successful search that you have conducted using a *Search and List window*,
- as a result of a successful search that you have conducted to match Property and Requirement records.

## Multi-line and Grid Options

These two options can be activated and deactivated by checking and un-checking the corresponding boxes located above the list section of a *Search and List window*. By default PRIMO activates the two options to show the list with grid lines and the text in the list on more than one line. The choice to turn these options on and off is particularly useful when printing lists.

### Multi-line Option

Certain fields, such as “Street Address” or “Remarks”, contain more information than can be displayed within a single-line cell. When the Multi-line option is activated, each line expands in height to accommodate the amount of text in each field. This can be particularly useful when printing a list.

### Grid Option

Depending on whether it is activated or not, the Grid option allows you to view a list with or without gridlines. Gridlines generally enhance legibility, especially when the list contains many empty fields.

## Configuring, Saving and Opening Lists

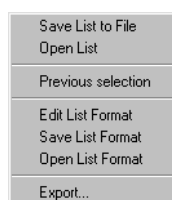
### Adding and Removing Columns

→ **Tip:**

This configuration option only applies to lists in *Search and List windows*. Match lists are configured differently (cf. [section entitled “Working with Match Lists” in this chapter, page 6-14](#)).

To add a column to a list proceed as follows:

1. Click on the “down arrow” icon located on the far right of the list toolbar.  
The following pop-up menu will open:



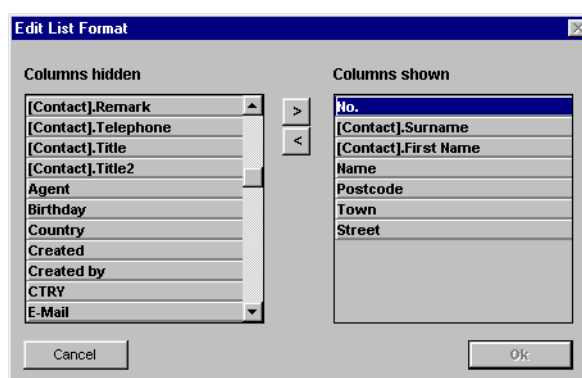
**Fig. 6-9:** List Configuration Pop-up Menu

→ **Tip:**

Two additional menu commands have been added to the list configuration pop-up menu in *Property* and *Requirement Search and List windows*. They are "Offer Property" and "Offer Requirement". These options allow you to transfer specific Properties or Requirements to a match list. For more information on this subject see the [section entitled “Adding Non-Matched Requirements to the Match List”, Chapter 3, “Properties”, page 3-19](#) and the [section entitled “Adding Non-Matched Properties to the Match List”, Chapter 4, “Requirements”, page 4-22](#).

2. Select “Edit List Format” from the pop-up menu.

A dialogue box will open with two lists, the one on the left is entitled “Columns hidden”, the other is entitled “Columns shown”. Lodged between both lists are arrows, one pointing to the left and one to the right.



**Fig. 6-10:** Dialogue Box: "Edit List Format"

→ **Tip:**

Records from different sections of PRIMO can have fields with the same name (e.g. Activity "Review Date" and Contact "Review Date"). Therefore, when PRIMO has to list them together a prefix will be added to one of the field names to differentiate them from one another (e.g. "[Activity].Review Date").

The "E-Mail" field shown in the above example is actually a virtual field that was created for the purpose of listing E-Mail addresses. For more information on the subject of virtual fields see the [section entitled "Virtual Fields", Chapter 1, "Basic Functions", page 1-39](#) and [section entitled "Virtual Fields", Chapter 15, "Administration", page 15-8](#)).

3. Select the column you wish to add from the "Columns hidden" list.
4. Click on the field in the "Columns shown" list after which you would like the new column to be added.
5. Click on the arrow pointing to the right (or in the direction of the "Columns shown" list").

The column you wished to move from the "Columns hidden" list will be located where you requested in the "Columns shown" list.

6. To move a column from the "Columns shown" list to the "Columns hidden" list, select it and click on the arrow pointing to the left.

The column has moved back to its original spot in the "Columns hidden" list.

7. Repeat Steps 3 and 4 until the "Column shown" list contains all the columns you require.
8. To confirm the moves you have made, click on "OK". Click on "Cancel" to stop the entire process. If you click on "Cancel" the list in the *Search and List window* will not change. If you click on "OK" the list in the *Search and List window* will change to accommodate any modifications you brought to the "Columns shown" list.

You might need to increase the *Search and List window* size or use the scrollbar to view all the columns in the list.

You may now change the order and width of the columns.

---

## Repositioning Columns

✓ **Prerequisite:**

You have activated the "Grid" option. The list is empty (optional). You are using the horizontal scrollbar to view all the columns in the list, or have increased the size of the *Search and List window* (cf. also [section entitled "Changing Window Size", Chapter 1, "Basic Functions", page 1-16](#)). You may need to temporarily shrink the width of some columns in order to view them all.

1. Move the mouse over a column title.
2. Press the ALT key, and keep it pressed while you press the left mouse button.  
The column is selected (keep the left mouse button pressed).  
Now use the mouse to move the column to where you would like it to go.  
As you move the column with the mouse, a vertical line (I-Beam) will follow.
3. Once you have found where you would like to reposition the column, release the mouse (and ALT key).  
The list is re-formatted to accommodate the column's new position.

## Modifying Column Widths

✓ **Prerequisite:**

You have activated the "Grid" option. The list is empty (optional). You have used the horizontal scrollbar or increased the size of the *Search and List window* so that you can see the right edge of the column you wish to resize. In addition, you also will need enough space to the right of the column to resize it fully (cf. [section entitled "Changing Window Size", Chapter 1, "Basic Functions", page 1-16](#)).

1. Move the mouse over the right gridline of the column you wish to modify. (Do this in the column title area).  
The cursor changes into a vertical line crossed by bi-directional arrows.
2. Leave the cursor in that position and hold down the ALT key and the left mouse button. Using the mouse, increase or decrease the width of the column.  
As you move the mouse, a dark vertical line will move along with it, indicating the right edge of the column.
3. When the column has reached the desired width, release the mouse (and ALT key).  
The list is re-formatted to accommodate the change in column width.

## Saving and Deleting List Formats

A list format contains

- the column selection,
- the column positions,
- the column widths.

These attributes are automatically saved whenever you reformat a *Search and List window* (Organisation, Contact, Property, Requirement or Activity). This means that the next

time you open a *Search and List window* that you recently formatted, the list will appear as you last saw it. List formats are saved per individual, so your formatting changes will not affect other PRIMO users. Note that the "Multi-line" and "Grid" options are not saved.

Moreover, each PRIMO user can save **several** list formats for his or her own use. The Program Administrator can also save list formats that can be accessed by all PRIMO users.

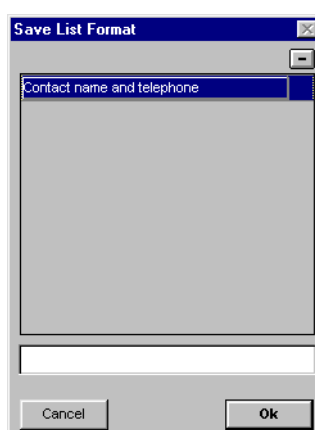
To save a list format proceed as follows (this applies to the PRIMO Administrator as well):

✓ **Prerequisite:**

The *Search and List window* is open and you have formatted the list (added or deleted columns, moved columns and changed column widths) that you would like to save. The list is empty (optional).

1. Select "Save List Format" from the pop-up menu ("triangle" icon) located above the list.

The following dialogue box will open:



**Fig. 6-11:** Dialogue Box: "Save List Format"

The dialogue box will show all formatted lists already saved by you for this specific *Search and List window* (e.g. *Property Search and List window* vs. *Organisation Search and List window*). Saved **list formats that appear in red** have been created by the PRIMO Administrator for use by all PRIMO users.

2. Give the formatted list you have created a name and save it by clicking on "OK".  
The dialogue box will close and the saved list is now ready for use.

➔ **Tip:**

You can save a list format without conducting a search. However, we do recommend that before you save a list format you conduct a search to test the new format.

To **delete** saved list formats, open the "Save List Format" dialogue box described above, select the list format you wish to delete and click on the "-" icon located at the top of the

dialogue box. **List formats that appear in red** can only be deleted by the Program Administrator.



**Important:**

The list format is deleted as soon as you click on the "-" icon. If you do not need to save another list format click on "Cancel" to close the dialogue box.



**Tip:**

To replace a saved list format with another, format the list as required and open the "Save List Format" dialogue box as explained above. Next, select and delete the list format you no longer need, then enter the name of the new list format and click on "OK". You can now reuse the name of the list format you have just deleted.

## Opening Saved List Formats

To open saved list formats proceed as follows:

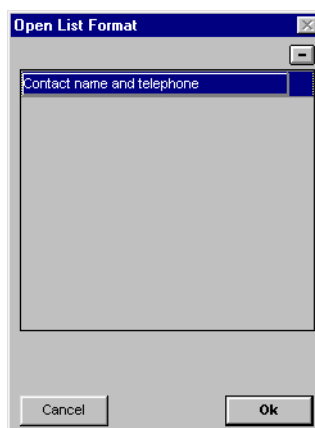


**Prerequisite:**

You have opened a *Search and List window*.

1. Select "Open List Format" from the pop-up menu ("triangle" icon) located above the list.

The following dialogue box will open:



**Fig. 6-12:** Dialogue Box: "Open List Format"

The dialogue box will show all list formats saved by you, as well as the PRIMO Administrator, for this specific *Search and List window* (e.g. *Property Search and List window* vs. *Organisation Search and List window*). Saved **list formats that appear in red** have been created by the Program Administrator.

2. Select the list format you would like to open and click on "Ok".

The dialogue box will close and the list format you opened will replace the previous list in the *Search and List window*.

---

## Adding to and reducing a List

With PRIMO you can perform a search and add search results to an already existing list of records. This process can be repeated several times so that the list is extended step-by-step. Adding search results to a list one search at a time is very useful when you wish to create a mailing list, for example, but one search will not list all the Contacts you require.

PRIMO also allows you to remove records from a list by "reducing" the list. This process can also be repeated several times.

### Adding to a List

✓ **Prerequisite:**

You have opened a *Search and List window* and there are results in the search list. You have obtained the results by conducting a regular search, by transferring a match list into the list or by opening a previously saved list.

1. Enter new search criteria in the search fields.
2. Activate the "Add" check-box located under the "Search" button.
3. Click on the "Search" button to start the new (additional) search.

The previous search results remain in the list and are now selected. The results of the new search are added below the previous search results. The results of both searches are easily distinguishable and if necessary the list can be reduced to no longer contain the newly added results (see below).

### Reducing a List

When you reduce a list, you are actually removing undesirable entries from the list so that it only contains the desired results.

✓ **Prerequisite:**

You have opened a *Search and List window* and there are results in the search list. You have obtained the results by conducting a regular search, by transferring a match list into the list or by opening a previously saved list.

1. **Either** select the lines (results) that you wish to **keep**:

If you click on a line that is not selected, that line will be selected and any other line that was previously selected no longer is. Nothing will happen if you click once on an already selected line.

If you click on a line to select it, hold down the Shift key and click on another line a few rows up or down, all the lines from the point of the first click to the point of your final click will be selected.

If you wish to select lines that are not grouped together, or if you wish to add a line to an already selected list, or remove a line from a selected list, hold down the Ctrl key while you click on the line. Holding down the Ctrl key while you click on the line again, will unselect that line.

2. **Or** select (using the methods explained above) the lines that you would like to remove from the list and click on the "Reverse Selection" icon located above the list. It is the second icon from the left.

The lines that were not previously selected should now be selected.

3. Click on the “Reduce List” icon located above the list. It is the one on the far left.  
The list should no longer contain the lines you removed.

If you have inadvertently selected the whole list, click on the “Reverse Selection” icon to bring the list back to where it was.

→ **Tip:**

It can be helpful to sort a list **before** you reduce it.

## Sorting Lists

Every column in a list can be sorted in ascending or descending order. You can even sub-sort a list. This is particularly useful when a column contains several similar entries. You could, for example, sort a list first by town and then by street.

✓ **Prerequisite:**

You have opened a *Search and List window*, conducted a search, transferred a match list into *Search and List* or opened a saved list. Or, you are on *page 2* of a Requirement or Property record and have conducted a search. Whichever type of search you conducted, the results should now be listed.

1. Click on the title of the column that you would like to see the list sorted by (e.g. Street).

The column title is underlined and the list is resorted by the column title you clicked on and in **ascending** order.

2. Click on the column title you just clicked on once again.

The column title remains underlined, but it is also now in italics. The list is resorted by the column title you clicked on (e.g. Street) and in **descending** order.

→ **Tip:**

Each time you click on a column title you have already clicked on, the sorting setting will change back and forth between **ascending** and **descending** order.

3. If you wish to sort the list more than once, you should now click on the next column title by which you would like to see the list sorted (e.g. Town).

The column title is underlined and the list is resorted in **ascending** order.

The previous sort you did (e.g. by Street) is still sorted although the column title is no longer underlined. The previous sort is now the secondary sort.

In this example the list is sorted, in order of priority, by Town and then by Street within each town.

→ **Tip:**

It is important that data entered into PRIMO is correct and consistent. This is especially important with names, since PRIMO sees differently spelled names as different entities and you will therefore not obtain the results expected. For example,

“Stratford upon Avon” and “Stratford/Avon” are seen as two different cities by PRIMO.

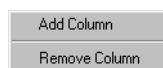
When sorting a list over two columns, it is generally pointless to use the “Street Address” column as the **primary** sorting column, since this column is sorted by street number.

## Working with Match Lists

### Adding Columns

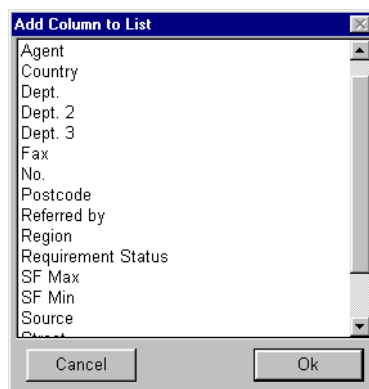
To add a column to a match list proceed as follows:

1. Click on the pop-up menu (“triangle” icon) located to the above right of the list. This will open the match list pop-up menu.



**Fig. 6-13:** Match List Pop-up Menu

2. Select “Add Column” from the pop-up menu. A dialogue box with a list in alphabetical order of all the available columns will open.



**Fig. 6-14:** Dialogue Box: “Add Column to List”

3. Select the column you wish to add to the match list and click on “OK”. The column you selected will be appended to the match list and the dialogue box will re-open so that you may add another column to the list.
4. When you are done adding columns to the match list, click on “Cancel” to close the dialogue box.

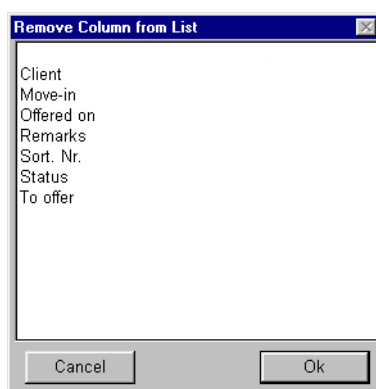
➔ **Tip:**

A column cannot be added to the match list more than once. Therefore, only the columns that are not already in the match list are listed in the dialogue box.

## Removing Columns

To remove a column from a match list proceed as follows:

1. Click on the “triangle” icon located to the above right of the list.  
This will open the match list pop-up menu.
2. Select “Remove Column” from the pop-up menu.  
A dialogue box with a list in alphabetical order of all the available columns will open.



**Fig. 6-15:** Dialogue Box: “Remove Column from List”

3. Select the column you wish to remove from the match list and click on “OK”.  
The column you selected is removed from the match list. The dialogue box will re-open so that you may remove another column from the list.
4. When you done removing columns from the match list, click on “Cancel” to close the dialogue box.

## Sorting Match Lists

Match lists have a special sorting capability: the “Sort. No.” column.

The “Sort. No.” column allows you to enter a sort number for each Property or Requirement listed in the match list. Once you assign a match list entry a number, it is saved with the rest of the match list. However, sort numbers are not transferred into *Search and List windows* when you transfer a match list.

Search results added to an existing match list are not automatically assigned sort numbers. Sort numbers can only be assigned by you.

Sort numbers can start with the number 0. There is no limit to the numbers you use. You can also use the same number more than once. An example of a "Sort. No." column would be: 0, 0, 0, 1, 2, 3, 3, 7. You may, of course, choose not to assign a sort number to an entry. If you do not assign sort numbers to any of the entries in the list, you should use another column title to sort your match list.

To sort a match list by the “Sort. No.” column title, proceed as follows:

- ✓ **Prerequisite:**  
If it is not already available, you should add the "Sort. No." column to the list.

1. Give each entry in the match list an appropriate sort number.  
The match list will remain unchanged, even if the "Sort. No." column title is selected.
2. Click on the "Sort. No." column title until the list is sorted the way you would like to see it (ascending or descending order). You may also wish to filter the list by selecting one of the filters from the drop down lists above the match list.  
The list is now sorted by sort number. If you are sorting in **ascending** order entries with no sort numbers will go to the bottom of the match list.

## Saving, Opening and Exporting Lists

- **Tip:**  
Besides being able to save and open results in a list as described below, you can also save and open search criteria. For more information on this topic see the [section entitled "Saving and Opening Search Criteria", Chapter 1, "Basic Functions", page 1-34](#). The same chapter also discusses the various ways of saving and opening lists.

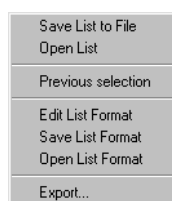
### Saving Lists

You can ask PRIMO to save a list of search results listed in a *Search and List window*. The list is saved outside of the database and can be saved to a local drive, a diskette or a network drive. The file that is saved does **not** contain the information entered in the database, only a list of the records. This database information is only accessible when the list is re-opened, therefore, any updates you have made to a record appearing in the list, will automatically be visible when you open the list and open that particular record.

- **Tip:**  
The type of list (Organisation, Requirement, Property or Activity) is stored along with the of records. Any sorting or formatting modifications you have brought to the list are not saved when you save a list of records. To save a list format (column selection, positions and widths) see the [section entitled "Saving List Formats" in this chapter, page 6-17](#).

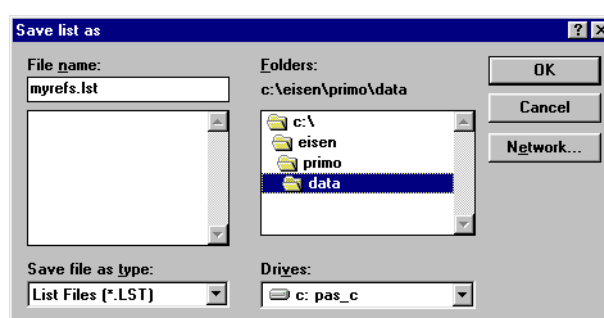
To save a list of records proceed as follows:

- ✓ **Prerequisite:**  
You have opened a *Search and List window*, and have some records visible in the list; this as a result of conducting a successful search, transferring records from a match list, or opening a previously saved list.
1. Click on the "triangle icon" located to the above right of the list.  
The following pop-up menu will open:



**Fig. 6-16:** List Configuration Pop-up Menu

2. Select “Save List to File” from the pop-up menu.



**Fig. 6-17:** Dialog Box: “Save list as”

This command opens the standard Windows dialogue box for saving files.

3. Select a drive and path and enter file name, then click on “OK “.  
The list is saved.



**Important:**

Do not attempt to open or edit this file. Doing so may prevent PRIMO from being able to properly recognise the contents of the file, and could cause PRIMO to display an error message and cancel any attempts to open the file

The next time you save or open a list, PRIMO will propose the last location you saved or opened a file from. This information is saved until you exit PRIMO.

## Saving List Formats

List formats in *Search and List windows* can be saved. The format is saved by list type (Organisation, Contact, Property, Requirement, Activity) and by PRIMO user. You can save the following formatting:

- Column selection,
- Column positions,
- Column widths.

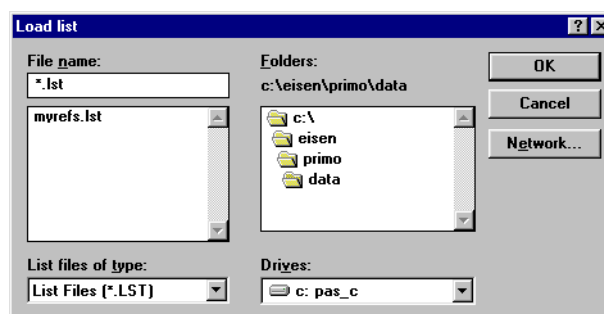
- **Tip:**  
Saving a list format does not save the contents of a list, nor the way the list is sorted. For information on how to save the contents of a list see the [section entitled “Saving Lists” in this chapter, page 6-16](#)).
- ✓ **Prerequisite:**  
You have formatted the list in a *Search and List window*, to your liking.
1. Click on the “triangle icon” located above the list.
  2. Select “Save List Format” from the pop-up menu.  
The list format is saved.

The list format is always be available to the PRIMO user who created it, (even after restarting PRIMO), as long as they login again as the same user.

## Opening a List

You can open any list of search results that you have previously saved by selecting the “Open List” option from the pop-up menu in a *Search and List window*.

- **Tip:**  
The saved list will be restored insofar as the same records will appear in the list. However, the contents of each record will show the most recent information about the record. Any formatting you applied to the list before you saved it will not appear when you re-open the list. If you wish to see the list under a particular format, you must save the format separately (cf. [section entitled “Saving List Formats”, Chapter 6, “Lists”, page 6-17](#)) and then choose that format once you re-open the list.
- ✓ **Prerequisite:**  
You have opened the appropriate *Search and List window* and the search list is empty or can be overwritten.
1. Click on the “triangle” icon located to the above right of the list.  
This will open the drop down menu.
  2. Select “Open List” from the drop down menu.  
This command opens the Windows dialogue box that is generally used when opening files.



**Fig. 6-18:** Windows Dialogue Box “Open List”

3. Select the list from drive and path where it was saved and click on “O.K. “. The list is opened.

➔ **Tip:**

You may also open a saved list directly from PRIMO's main menu. Select "Open Saved List" from the File menu. All the lists you have saved, regardless of the *Search and List window* they were created from will be listed. Choose the list you wish to open and click on "OK" (as described above). The appropriate *Search and List window* will open showing your list. This procedure is different from opening a list from a *Search and List window*, because when you open a list from a *Search and List window* you can only open a list that applies to it.

## Exporting a List

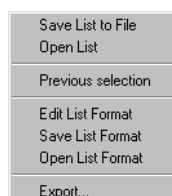
You may only export a list if your **PRIMO Administrator** has given you access to this option (cf. [section entitled “Authorising List Printing and Exporting”, Chapter 15, “Administration”, page 15-52](#)). If not, the "Export..." option in the list pop-up menu is deactivated.

PRIMO's export option allows you to export a list of search results to an external data file on your computer. The difference between saving a list and exporting it is that a saved list can only be re-opened in PRIMO whereas an exported list can be opened by another program. To be able to open a list from another program, you must be sure to select that program's data format when you export the list. The program must also be available on your computer (e.g. a spreadsheet program such as MSEXCEL®; a text editor such as Notepad.exe or also MSWORD®; a report creator such as PowerSoft InfoMaker®), or you will not be able to open the list. PRIMO offers quite a selection of program types for you to save your list under (e.g. text, spreadsheet, report, graphic).

The various formats that are available for the export of lists are not described in this handbook, since they do not directly apply to the use of PRIMO. Therefore, before exporting a list, you must know what type of format you wish to use.

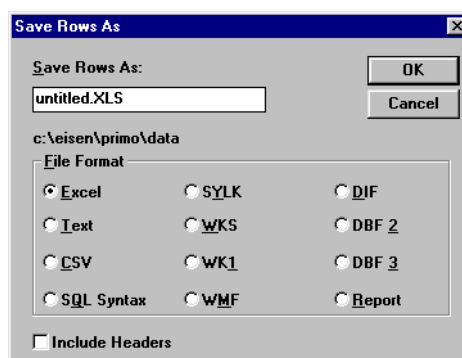
To export a list proceed as follows:

- ✓ **Prerequisite:**  
You have opened a *Search and List window*, and have some records visible in the list; this as a result of conducting a successful search, transferring records from a match list, or opening a previously saved list.
1. Click on the “triangle” icon located just above the list.  
The following pop-up menu will open:



**Fig. 6-19:** List Configuration Pop-up Menu

2. Select the “Export...” option from the pop-up menu.  
The following window will open:



**Fig. 6-20:** Dialogue Box: “Save Rows As”

3. Select the appropriate format.
4. Check the “Include Headers” check-box if needed. Activating this option will add the list column titles to the list you are exporting.  
Once you have chosen a format, the list is given the file name “untitled” followed by the format-specific extension.  
Below the file name is the suggested drive and path.
5. If the drive and path suggested are correct, simply replace the file name "untitled" with another name and click on "OK".  
If you need to change the drive and path, enter that information before the file name followed by a back-slash and click on "OK".

→ **Tip:**

Make sure you do not erase the format-specific extension, since this is how Windows determines which application to link to the saved list.

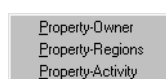
The list is saved under the chosen format.

## Organisation & Contact Search and List Window Mailing Options

The list toolbars of *Organisation* and *Contact Search and List windows* contain two additional icons, the “mailing” icon and the “label” icon. These icons allow you to use search results as an address list to send out mailings (cf. [Chapter 11, “Mailings”](#)) and to print labels (cf. [Chapter 12, “Labels”](#)).

## Preset Search and List Windows

If you select *Preset Search and List* from the Data menu, a sub-menu listing specific *Preset Search and List windows* will open:



**Fig. 6-21:** “Preset Search and List” Sub-menu

- **Property-Owner:** A special *Search and List window* allowing you to search for Contacts that own Properties. Search criteria and display columns can be selected from the Contact, Organisation and Property data sections of PRIMO.
- **Property-Regions:** A *Property Search and List window* which lists the Properties matching the regional information you enter into a special Property-Region search dialogue box.
- **Property-Activity:** A special *Search and List window* allowing you to search and list Activities linked to Properties. Any Requirements linked to the same Activity as the Property will be seen as the “Client” when the Activity is listed.

Eisen & Partner GmbH can create additional *Preset Search and List windows* upon request.

## Property-Owner Search and List Window

The *Property-Owner Search and List window* allows you to search for Contacts in the PRIMO database who own Property. Specifically, PRIMO will search for Contacts linked to any Property as an owner. Search criteria and display columns can be selected from the Contact, Organisation and Property sections of PRIMO.

The list that results from such a search can also be used as an address list for mailings (cf. [Chapter 11, "Mailings"](#)) and labels (cf. [Chapter 12, "Labels"](#)).

It is not possible to delete a property owner from the PRIMO database from the *Property-Owner Search and List window*.

Selecting an entry in the list and double-clicking on it or pressing F2 will open the corresponding Contact record.

## Property-Regions Dialogue Box

The *Property-Regions dialogue box* offers you a quick-and-dirty way of searching for and listing Properties in a given region. This is particularly useful if you do not have easy access to a Requirement record's "Region" matching features (cf. [section entitled "Matching Section", Chapter 4, "Requirements", page 4-20](#)). This could occur, for example, if the Requirement does not yet exist and the client who is requesting a Property in a certain region is currently on the phone with you.

If you select *Preset Search and List* from the Data menu and then choose *Property-Regions*, a dialogue box will open with region search fields. Enter the region you are looking for. You may use the wild card (%), if necessary (cf. [section entitled "Searching Using the Wild Card", Chapter 1, "Basic Functions", page 1-33](#)).

➔ **Tip:**

If Region Lists have been properly set up in the Administration section of PRIMO, then more extensive searches may be quite simple to specify, e.g. "%East" will find anything in the "East", "South East" and "North East" regions as well.

Once you have entered the search criteria in the search fields, click on "OK". A *Property Search and List window* will open and any Properties that match your search requirements will be listed in the result list. You will be informed if no Properties match your search requirements.

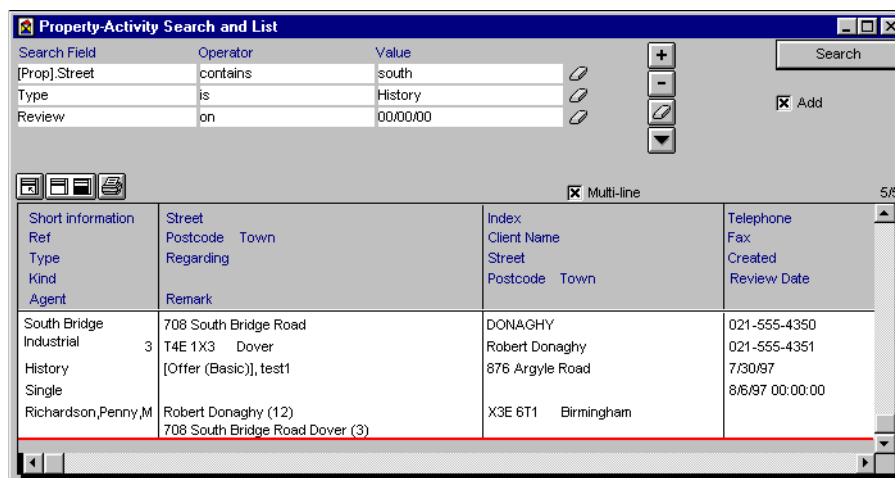
To open one of the listed records, double-click on it or press F2.

➔ **Tip:**

The region criteria you entered in the *Property-Region dialogue box*, will not be applied to any further searches you conduct in the *Property Search and List window*.

## Property-Activity Search and List Window

The *Property-Activity Search and List window* displays Activities that are linked to Properties and if applicable, Requirements as well.



**Abb. 6-22:** *Property-Activity Search and List window*

To open a *Property-Activity Search and List window*, select *Preset Search and List* from the Data menu, then choose *Property-Activity*.

The Search fields for the *Property-Activity Search and List window* include columns from the Activity, Property and Requirement sections of the PRIMO database.

The result list will show information about the Activity and the Property, and eventually the Requirement as well, if one has been linked to this Activity (e.g. if a Property was offered to a client, that client would be linked to the Activity through a Requirement record and would be listed as a client).

The list can be extended, reduced, printed and sorted. The columns cannot be further formatted nor modified.

To open a listed Activity record, double-click on it or press F2. You may open the linked Property and Requirement records from within the open Activity record.