Method Integration

Objects Guide

Contents

Method Objects

Button

The Button object inserts a button into a field cell. Once clicked the Button performs a list of actions that you specify.

Here's how it looks in the Toolbox:

So Where Would We Use It?

Several examples of Buttons include Save, Delete and Refresh. These examples are used frequently throughout Method.

Add a Button

A Button can be added to a screen from the Toolbox on the design screen page. To add a Button, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen (See Method Customization User Guide).
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Button object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish the changes, click **Save & Close**, then select **Cancel**.

Edit a Button

1. Follow the steps to Edit an Existing Screen or Add a New Screen (See Method Customization User Guide).
2. Add a Button or go to an existing button in the design screen.
3. Click **Edit** in the upper-right corner of the button you wish to edit.
4. The Button Properties Wizard appears. The wizard is divided into 2 steps that follow:

Step 1 of 2: Button Properties

1. Enter *Caption*.
2. Click **Advanced Options** (Optional); otherwise click **Next** and proceed to Step 2 of 2: Button Actions.

If you opted to show advanced features, you can:
1. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
2. Uncheck the *Use default font* size box and enter a font size in the corresponding field.
3. Check the *Underlined* box for the caption to be underlined.
4. Check the *Italic* box for the caption to appear in italics.

5. Check the *Bold* box for the caption to appear in bold.
6. Check the *Hidden* box for the object to not appear on the screen.
7. Check the *Show button as link* box if you wish for the button to appear as a link on the screen (Optional).
8. Select an option from the *Align Button* dropdown.
9. Click **Next**.

Step 2 of 2: Button Actions

1. Select either **Add Action** or **Copy Action** by checking the desired radio box.
2. Select *Event* from the dropdown list, by default the only option is *Click*, or new events can be created by clicking on '**…**'.
3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Finish**.
6. To finish select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Button

1. Follow the steps to Edit an Existing Screen.
2. Find the Button you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Button you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish select the appropriate option below:

   A. If you are ready to activate your changes to the screen but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Button Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Button or go to an existing button in the design screen.
3. Click the '↔' icon in the upper-right corner of the Button to resize. With each click, the Button will grow to occupy the cell to the right. Once the Button has occupied all cells in its row, the next click will decrease the Button's size to only the cell it was originally placed in.
4. To finish select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Calendar

The Calendar object inserts a calendar into a field cell. The calendar is extremely useful on dashboards, particularly for scheduling, planning and tracking purposes.

Here's how it looks in the Toolbox:

So Where Would We Use It?

Calendars are helpful with scheduling, such as time-billing or creating follow-up activities.

Add a Calendar

A calendar can be added to a screen from the Toolbox on the design screen page. To add a Calendar, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen (See Method Customization User Guide).
2. Click **Add Objects** in the Toolbox.
3. Click and drag the Calendar object to the desired cell in the design screen to the right.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Calendar

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Calendar or go to an existing Calendar in the design screen.
3. Click **Edit** in the upper-right corner of the Calendar object you wish to edit.
4. The Calendar Properties Wizard appears. The wizard is divided into 7 steps that follow:

Step 1 of 7: Choose Calendar Options

1. Enter *Day start time* or select from the dropdown list.
2. Enter *Day end time* or select from the dropdown list.
3. Select *Default View* from the dropdown list.

    The choices are:
    - Day
    - Work Week
    - Week
    - Month
    - Timeline

    .
4. Select *Group By* from the dropdown list.

    The choices are:
    - Date
    - Resource

5. Check all the boxes that apply for *Work Week*.
6. Check the *Appointments can be moved* box if you would like to allow appointment times to be changed by users; uncheck to disable this feature.
7. Check the *Appointments can be resized* box if you would like to allow the calendar's size to be changed in the design screen; uncheck to disable this feature. Refer to Change the Calendar Size.
8. Fill the *Appointments can have their resource changed* box if you would like to allow users to change the resource of appointments; uncheck to disable this feature.
   Note: this option is only available if you selected the Resources option from the Group By dropdown list.
9. Check the *Show All Day Event Area* box if you would like to allow the option of displaying all day events; Uncheck to disable this feature.
10. Click **Next**.

Step 2 of 7: Mapping Main Table

1. Select *Main Table* from the dropdown list (*Required field).
2. Select *Start Date & Time* from the dropdown list (*Required field).
3. Select *End Date & Time* from the dropdown list (*Required field).
4. Select *Appointment Field 1* from the dropdown list, if applicable.
5. Enter Caption for Appointment Field 1.
6. Repeat Steps 4 and 5, if needed. If you need additional appointment fields, click **Show more appointment fields**; otherwise click **Next**.

Step 3 of 7: Choose Resources

1. Select *Resource* from the dropdown list (*Required field).
2. Select *Color* from the dropdown list, if applicable.
3. Select *Image* from the dropdown list, if applicable.
   Note: you must place a Picture Field onto the table to store the image before you can select it from the dropdown.
4. Select *Default Resource* from the dropdown list, if applicable.
5. Select *Second Resource* (Optional) from the dropdown list, if applicable.
6. Check *Show Filter Row* to allow users to filter resources.
7. Click **Next**.

Step 4 of 7: Choose Label (Optional)

1. Select *Label* from the dropdown list, if applicable.
2. Select *Color* from the dropdown list, if applicable.
3. Select *Image* from the dropdown list, if applicable.
   Note: you must place a Picture Field onto the table to store the image before you can select it from the dropdown.
4. Click **Next**.

Step 5 of 7: Choose Status (Optional)

1. Select *Status* from the dropdown list, if applicable.
2. Select *Color* from the dropdown list, if applicable.
3. Select *Image* from the dropdown list, if applicable.
4. Select *Second Status* from the dropdown list, if applicable.
5. Check *Show Filter Row* to allow users to filter these columns.
6. Click **Next**.

Step 6 of 7: Actions (Optional)

1. Select *Event* from the dropdown list, or click '**...**' to create a new one.
   The choices are:
   - Edit

- Edit Series
- New

2. Select *Action* from the dropdown list.
3. Check the *Automatically Change Status Option* box to change the status automatically; uncheck the box to manually change status, if applicable.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Repeat Steps 1 - 6 until all necessary actions have been entered.
6. Click **Next**.

Step 7 of 7: Filter

2. Select a filter for *Dates* from the dropdown.

   The choices are:
   - Built In - This will allow you to use the on-screen filters that are built into the Method Calendar Object.
   - Value From Screen – sets the condition to a value pulled from a specific field within the specified screen. Select *From* and *To* options from the list of dropdowns to the right

3. Select a filter for *Resources* from the dropdown.

   The choices are:
   - Built In - This will allow you to use the on screen filters that are built into the Method Calendar Object.
   - Value From Screen – sets the condition to a value pulled from a specific field within the specified screen. Select *Resource* from the dropdown list to the right.

4. Select a filter for *Status* from the dropdown.

   The choices are:
   - Built In - This will allow you to use the on screen filters that are built into the Method Calendar Object.
   - Value From Screen – sets the condition to a value pulled from a specific field within the specified screen. Select value from dropdown list to the right.
   - Type In – sets the condition to a value that the user types in manually. Enter value to the right.
   - Build Selection List – lists all values from the user-defined list. Enter value(s) to the right.

4. Select how you want the *Filter Layout* to be displayed, either Vertically or Horizontally.
5. Select a field from the dropdown list to insert an *Automatic Filter* and click **Insert Filter…**; otherwise click **Finish**.
6. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Calendar

1. Follow the steps to Edit an Existing Screen.
2. Find the Calendar you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Calendar you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Calendar Size

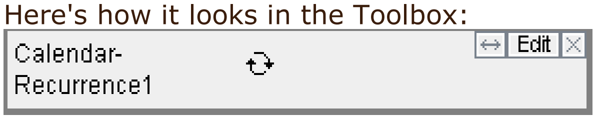
1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Calendar or go to an existing Calendar in the design screen.
3. Click the '↔' icon in the upper-right corner of the Calendar to resize. With each click, the button will grow to occupy the cell to the right. Once the Calendar has occupied all cells in its row, the next click will decrease the Calendar's size to only the cell it was originally placed in.
4. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Calendar-Recurrence

The Calendar-Recurrence object inserts a Calendar-Recurrence option into a field cell allowing the option to make an event recurring.

Here's how it looks in the Toolbox:



So Where Would We Use It?

Calendar-Recurrence is helpful when scheduling events that recur periodically (e.g. daily, weekly, or every Monday and Friday) over a specified time period. When not in use, the Calendar-Recurrence object looks much like a checkbox. Once checked for use, the Calendar-Recurrence options will be displayed.

Add a Calendar-Recurrence

A Calendar-Recurrence can be added to a screen from the Toolbox on the design screen page. *(Note: a Calendar must exist or be added prior to using the Calendar-Recurrence.)* To add a Calendar-Recurrence, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Calendar and complete the wizard if one does not exist on the screen.
3. Click **Add Objects** in the Toolbox.
4. Click and drag the Calendar-Recurrence object to the desired cell in the design screen to the right.

5. Release the mouse button.
6. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Calendar-Recurrence

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Calendar-Recurrence or go to an existing Calendar-Recurrence in the design screen.
3. Click **Edit** in the upper-right corner of the Calendar-Recurrence you wish to edit.

The Calendar-Recurrence Properties Wizard appears:

4. Select the *Status Flag* (Optional) from the dropdown list.
5. Select *Resources* from the dropdown list.
6. Select *Optional Field For Projects* from the dropdown list.
7. Check the *Recurring* Dates Columns to be displayed.

   The choices are:
   - Time
   - Resource
   - Status
   - Flag

8. Check the *Allow Basis* to be available.

   The choices are:
   - Daily
   - Weekly
   - Monthly
   - Yearly
   - Project
9. Select the *Default Basis* from the dropdown list.

   The choices are:
   - Daily
   - Weekly
   - Monthly
   - Yearly
   - Project

10. Select *Show Recurrence Grid* from the dropdown list.

    Your choices are
    - Horizontally (Right of Basis Options)
    - Vertically (Below Basis Options)

11. Select *Number of rows to display* from the dropdown list.
12. Check or uncheck the option to *Allow manual date insertions*.
13. Check or uncheck the option to *Delete existing occurrences on insert (Default Checked)*.
14. Click **Finish** to close this window.

15. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Calendar-Recurrence

1. Follow the steps to Edit an Existing.
2. Find the Calendar-Recurrence you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Calendar-Recurrence you wish to delete.
4. Click **OK** when prompted to confirm.
5. If you are ready to activate your changes to the system, click **Publish** in the Toolbox then **Save & Close**; otherwise click **Save & Close** then **Cancel** when prompted to publish before closing.

Change the Calendar-Recurrence Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Calendar-Recurrence or go to an existing Calendar-Recurrence in the design screen.
3. Click the '↔' icon in the upper-right corner of the Calendar Recurrence to resize. With each click, the object will grow to occupy the cell to the right. Once the Calendar Recurrence has occupied all cells in its row, the next click will decrease the Calendar Recurrence size to only the cell it was originally placed in.
4. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Checkbox

The Checkbox object inserts a checkbox into a field cell.

Here's how it looks in the Toolbox:

So Where Would We Use It?

Checkboxes are used when answering yes/no questions, such as if a job is complete or if an activity is recurring.

Add a Checkbox

A checkbox can be added to a screen from the Toolbox on the design screen page. To add a checkbox, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New.

2. Click **Add Objects** from the Toolbox.
3. Click and drag the Checkbox object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Checkbox

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Checkbox or go to an existing Checkbox in the design screen.
4. Click **Edit** in the upper-right corner of the Checkbox object.
5. The Checkbox Properties Wizard appears. The wizard is divided into 2 steps as follows:

Step 1 of 2: Checkbox Properties

1. Enter *Caption*.
2. Select *Caption Location* from the dropdown list.

   The choices are:
   - Top
   - Left
   - Right
   - None

3. Check the *Default value* box to have the checkbox pre-populated as checked on the screen; uncheck the *Default value* box to have the checkbox pre-populated as unchecked on the screen.
4. Click **Advanced Options** to show additional features; otherwise click **Next** and proceed to Step 2 of 2: Checkbox Actions.

If you opted to show additional features, you can:

1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account; uncheck the *Use default font size* box and manually enter a font size in the corresponding field.
4. Check the *Underlined* box for the caption to be underlined.
5. Check the *Italic* box for the caption to appear in italics.
6. Check the *Bold* box for the caption to appear in bold.
7. Check the *Hidden* box if you wish for the object to be hidden from the screen.
8. Check the *Read Only* box if you wish to not allow the object to be edited.
9. Enter *Hover Help Tip*, if applicable.
10. Click **Next**.

Step 2 of 2: Checkbox Actions

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list, by default the only option is *Click*.

3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Finish**.
6. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen. but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Checkbox

1. Follow the steps to Edit an Existing Screen.
2. Find the checkbox you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the checkbox you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Checkbox Size

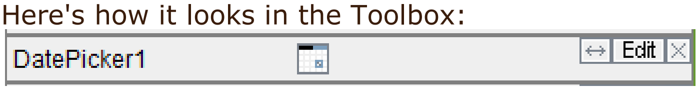
1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Checkbox or go to an existing Checkbox in the design screen.
3. Click the '↔' icon in the upper-right corner of the Checkbox you wish to resize. With each click, the Checkbox will grow to occupy the cell to the right. Once the Checkbox has occupied all cells in its row, the next click will decrease the Checkbox size to only the cell it was originally placed in.
4. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

DatePicker

The DatePicker object inserts a DatePicker into a field cell. This allows you to input date and time information in either a graphical or textual format.

Here's how it looks in the Toolbox:



So Where Would We Use It?

The DatePicker can be used with Calendars or screens that are used to input dates, such as an invoice or estimate transaction date.

Add a DatePicker

A DatePicker can be added to a screen from the Toolbox on the design screen page. To add a DatePicker, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the DatePicker object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a DatePicker

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a DatePicker or go to an existing DatePicker in the design screen.
4. Click **Edit** in the upper-right corner of the DatePicker object you wish to edit.
5. The DatePicker Properties Wizard appears. The wizard is divided into 4 steps as follows:

Step 1 of 4: Date/Time Properties

1. Enter *Caption*.
2. Select *Caption location* from the dropdown list.

    The choices are:
    - Top
    - Left
    - Right
    - None

3. Enter Default value or check the *Use today's date/time* box.
4. Click **Advanced Options** (Optional); otherwise click **Next** and proceed to Step 2 of 4: Date/Time Actions.

If you opted to show Advanced Options, you can:
1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Select *Text forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
4. Select *Text backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
5. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
6. Uncheck the *Use default font size* box and enter a font size in the corresponding field.
7. Check the *Underlined* box for the caption to be underlined.
8. Check the *Italic* box for the caption to appear in italics.
9. Check the *Bold* box for the caption to appear in bold.

10. Check the *Hidden* box if you wish for the object to be hidden.
11. Check the *Read Only* box if you wish to not allow the object to be edited.
12. Enter a *Hover Help Tip* if applicable.
13. Click **Next**.

Step 2 of 4: Date/Time Actions

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list.

    The choices are:
    - DateChanged
    - Button Click

3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Next**.

Step 3 of 4: Date/Time Validation Rules

1. Select *Condition* from the dropdown list.

   The choices are:
   - Less than – requires value less than the criteria.
   - Less than or equal to – requires value less than or equal to the criteria.
   - Equal to – value must match the criteria.
   - Is not equal to – value cannot match the criteria.
   - Greater than – requires value greater than the criteria.
   - Greater than or equal to – requires value greater than or equal to the criteria.
   - Is not empty – value cannot be empty.
   - Between – requires value must fall between specified criteria.
   - Within date range – value must fall within specified date range.

2. If you selected *Is not empty* for Step 1, skip to Step 5; otherwise proceed to Step 3.
3. Select *Value* from the dropdown list.

   The choices are:
   - Type In – sets the condition to a user-defined action result.
   - Value From Screen– sets the condition to a value pulled from a specific field within the specified screen.

4. If you selected *Type In* for Step 3, skip to Step 5; otherwise select from the dropdown list below. If you selected *Between* as the condition in Step 1, select the range of values accordingly.
5. Click **Add Validation Rule.**
6. Click **Next**.

Step 4 of 4: Date/Time Formatting

1. Fill the appropriate Format checkbox. Check all that apply.

    The choices are:
    - Show Date and Time
    - Display Time Only
    - Always show current time?
    - Override default time of day to

2. Click **Finish**.
3. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a DatePicker

1. Follow the steps to Edit an Existing.
2. Find the DatePicker you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the DatePicker you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the DatePicker Size

1. Follow the steps to Edit an Existing Screen or Add a New.
2. [Add a DatePicker](#) or go to an existing DatePicker in the design screen.
3. Click the '↔' icon in the upper-right corner of the DatePicker you wish to resize. With each click, the DatePicker will grow to occupy the cell to the right. Once the DatePicker has occupied all cells in its row, the next click will decrease the DatePicker size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Dropdown

The Dropdown object inserts a dropdown list in a field cell for users to enter data by selecting from user-defined options.

Here's how it looks in the Toolbox:

So Where Do We Use It?

Dropdown lists are used when you wish to enter data based on a specific group of choices. The user selects a choice from a pre-defined list.

Add a Dropdown

A Dropdown can be added to a screen from the Toolbox on the design screen page. To add a Dropdown, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Dropdown object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Dropdown

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Dropdown or go to an existing Dropdown in the design screen.
4. Click **Edit** in the upper-right corner of the Dropdown object you wish to edit.
5. The Dropdown Properties Wizard appears. The wizard is divided into 4 steps that follow:

Step 1 of 5: Dropdown Object Properties

1. Enter *Caption*.
2. Select *Caption location* from the dropdown list.

    The choices are:
    - Top
    - Left
    - Right
    - None

3. Set a *Default Value* if applicable.
4. Click **Advanced Options** (Optional); otherwise, click **Next** and proceed to Step 2 of 4: Dropdown Object Actions.

If you opted to show *Advanced Options*, you can:

1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Select *Text forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
4. Select *Text backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
5. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account; uncheck the *Use default font s*ize box and manually enter a font size in the corresponding field.
6. Check the *Underlined* box for the caption to be underlined.
7. Check the *Italic* box for the caption to appear in italics.
8. Check the *Bold* box for the caption to appear in bold.
9. Check the *Hidden* box for the object to be hidden.
10. Check the *Read Only* box if you wish to not allow users to change this dropdown.

11. Enter *Hover Help Tip*, if applicable.
12. Click **Next**.

Step 2 of 5: Dropdown Object Actions

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list.

   The choices are:
   - Text Change
   - Button Click
   - Add New

3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Next**.

Step 3 of 5: Dropdown Validation Rules

1. Select *Condition* from the dropdown list.

   The choices are:
   - Contains – requires value contain specified criteria.
   - Does not contain – value cannot contain specified criteria.
   - Equal to – value must match criteria.
   - Is not equal to – value cannot match criteria.
   - Starts with – value must start with specified criteria.
   - Ends with – value must end with specified criteria.
   - Is empty – value must be empty.
   - Is not empty – value cannot be empty.
   - Build selection list – value must be found in the selection list.

2. If you selected *Is empty*, or *Is not empty* for Step 1, skip to Step 5; if you selected *Build selection list* for Step 1, type values into selection list then skip to Step 5; otherwise proceed to Step 3.
3. Select *Value* from the dropdown list.

   The choices are:
   - Type In – sets the condition to a user-defined action result.
   - Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

4. If you selected *Type In* for Step 3, skip to Step 5; otherwise select from the dropdown list below.
5. Click **Add Validation Rule**.
6. Click **Next**.

Step 4 of 5: Dropdown Choices

1. Select *Value From Table.* This is the table the dropdown will get its selection from.
2. Select the *1st column* from the dropdown list.
3. Select the *2nd column* from the dropdown, if applicable.
4. Select the *3rd column* from the dropdown, if applicable.
5. Select a default value for the list.

Step 5 of 5: Dropdown Field Filter

1. Select an option for the *Choose from a list of available field's* dropdown list.

2. Click **Insert Filter**.
3. Click **Finish**.
4. To finish select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Dropdown

1. Follow the steps to Edit an Existing.
2. Find the Dropdown you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Dropdown you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Dropdown Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Dropdown or go to an existing Dropdown in the design screen.
3. Click the '↔' icon in the upper-right corner of the Dropdown you wish to resize. With each click, the Dropdown will grow to occupy the cell to the right. Once the Dropdown has occupied all cells in its row, the next click will decrease the Dropdown size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Grid

The Grid object inserts a grid in a field cell. A grid graphically displays data for reference.

Here's how it looks in the Toolbox:

So Where Do We Use It?

Use a grid anywhere you wish to display data graphically for easy viewing, sorting and query capabilities.

Add a Grid

A Grid can be added to a screen from the Toolbox on the design screen page. To add a Grid, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Grid object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Grid

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Grid or go to an existing Grid in the design screen.
4. Click **Edit** in the upper-right corner of the Grid object you wish to edit.
5. The Grid Properties Wizard appears. The wizard is divided into 8 steps that follow:

Step 1 of 8: Grid Properties

1. Enter *Caption.* By default the name of the screen's table will appear.
2. Select the appropriate choice for *List data from which Table?*

   The choices are:
   - Attached – Allows the user to select a Table that is linked to the Screen's Table. Select *Table Name* from the dropdown list.
     You can choose a table that has an existing relationship with the table the current screen is built from. The grid will display filtered information based on the current screen's active record. In other words, records that are children of the screen's selected record.

   - Detached – Allows the user to select a Table that is not linked to the Screen's Table. Select Table Name from the dropdown list.
     You can choose the table the grid will be built from. This grid's table will be independent of any other table or grid related to the current screen.

3. Check the *Checkbox Column* box to make the first column of the grid a series of checkboxes.
4. Check the *Grouping heading* box to allow users to drag column headers to a grouping header.
5. Select *Number of rows to display* and *Custom Font Size* from the dropdown lists.
6. Click **Next.**

Step 2 of 8: Grid Columns

1. Fill the *Link* radiobox to insert new Grid columns as links, or the *Field* radiobox to insert new Grid columns using a specific field.
2. If you selected the *Field* radiobox, then specify the *Field* from the dropdown list; otherwise skip to Step 3. If the field is numeric, you may choose to calculate subtotals for the column when the option appears.

3. Enter *Column Caption*.
4. Enter *Column Width.*
5. Fill the appropriate radiobox to display column width using pixels or % of available width.
6. Click **Insert Column**.
7. Continue to add actions to links or fields or re-arrange by clicking on the Move up or down arrow or delete them as necessary.
8. Click **Next**.

Step 3 of 8: Filters

1. Check the *Filter Header* checkbox if you wish to allow users to set their own filtering.
2. Select *View Name* from the dropdown list or Click **New / Edit…** to create or edit an existing View Name.
3. Select an available field from the dropdown list that the filter should be applied to.
4. Click **Insert Filter…**
5. Click on Edit to make changes or Delete to remove the existing filters
6. Click **Next**.

Step 4 of 8: Sorting

1. Select *Sort first by* from the dropdown list.
2. Select *direction* from the dropdown list.
3. Repeat Steps 1 and 2, for additional sorting if applicable.
4. Click **Next**.

Step 5 of 8: Allow Edit?

1. Fill the *Do not allow editing of rows* radiobox to prevent users from editing within the grid.
   Fill the *Editing takes place directly in the grid* radiobox to allow users to edit from within the grid.
2. If you opted to fill the *Editing takes place directly in the grid* button, enter *Caption for the edit link*; otherwise skip to Step 7.
3. Fill the Add Action or Copy Action option.
4. Select the event that will trigger actions (after or before update).
5. Select an action from the *Action* dropdown list.
6. Click **Add Action…** (See Method Actions Reference Guide for assistance).
7. Click **Next**.

Step 6 of 8: Allow Add?

1. Fill the *Do not allow adding of rows* radiobox to prevent users from adding rows to the grid.
   Fill the *Adding takes place directly in the grid* radiobox to allow users to add rows from within the grid.
2. If you opted to fill the *Adding takes place directly in the grid* radiobox, enter *Caption for the add link* and *Number of new rows*; otherwise skip to Step 7.
3. Fill the Add Action or Copy Action option.
4. Select the event that will trigger actions (after or before update).
5. Select an action from the *Action* dropdown list.
6. Click **Add Action…** (See Method Actions Reference Guide for assistance).
7. Click **Next**.

Step 7 of 8: Validation Rules

1. Select *Field* from the dropdown list.

2. Select *Condition* from the dropdown list.

   The choices are:
   - Less than – requires value less than the criteria.
   - Less than or equal to – requires value less than or equal to the criteria.
   - Equal to – value must match the criteria.
   - Is not equal to – value cannot match the criteria.
   - Greater than – requires value greater than the criteria.
   - Greater than or equal to – requires value greater than or equal to the criteria.
   - Is empty – value must be empty.
   - Is not empty – value cannot be empty.
   - Between – requires value must fall between specified criteria.
   - Within date range – value must fall within specified date range.

3. If you selected *Is not empty* or *Is not empty* for Step 2, skip to Step 6; otherwise proceed to Step 4. If you selected *Between* as the condition in Step 2, select the range of values accordingly.
4. Select *Value* from the dropdown list.

   The choices are:
   - Type In – sets the condition to a user-defined action result.
   - Value From Screen– sets the condition to a value pulled from a specific field within the specified screen.

5. If you selected *Type In* for Step 4, enter predefined value; otherwise select value from the dropdown list below.
6. Click **Add Validation Rule.**
7. Click **Next**.

Step 8 of 8: Confirmation

1. Review and confirm the details of your Grid, making changes as necessary.
2. Click **Finish**.
3. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Grid

1. Follow the steps to Edit an Existing.
2. Find the Grid you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Grid you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Grid Size

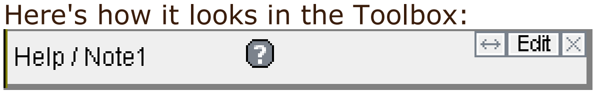
1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Grid or go to an existing Grid in the design screen.
3. Click the '↔' icon in the upper-right corner of the Grid you wish to resize. With each click, the Grid will grow to occupy the cell to the right. Once the Grid has occupied all cells in its row, the next click will decrease the Grid size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Help/Note

A *Help/Note* gives detailed tips and assistance to your users when they click the help link. You can select which type of icon you wish to have displayed on the screen, for instance a '?' for a help topic or a '!' for a note.

Here's how it looks in the Toolbox:



So Where Do We Use It?

Help/Notes are particularly helpful when trying to prevent data entry errors in potentially confusing situations. A Help/Note can offer additional clarification, such as the definition of 'Lead Status Only' customers in QuickBooks.

Add a Help/Note

A Help/Note can be added to a screen from the Toolbox on the design screen page. To add a Help/Note, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Help/Note object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Help/Note

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Help/Note or go to an existing Help/Note in the design screen.
4. Click **Edit** in the upper-right corner of the Help/Note object you wish to edit.
5. The Help/Note Properties Wizard appears.

6. Choose an icon by selecting the appropriate option.

   The choices are:
   - Help
   - Help (blue)
   - Note
   - Note (blue)
   - None

7. Enter the *Title* for your Help/Note.
8. In the text area below, enter the body of the Help/Note.
9. Format the text accordingly. Be sure to utilize the Design, HTML and Preview buttons at the bottom of this section.
10. Click **Save & Close**.
11. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Help/Note

1. Follow the steps to Edit an Existing.
2. Find the Help/Note you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Help/Note you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Help/Note Size

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Help/Note or go to an existing Help/Note in the design screen.
3. Click the '↔' icon in the upper-right corner of the Help/Note you wish to resize. With each click, the Help/Note will grow to occupy the cell to the right. Once the Help/Note has occupied all cells in its row, the next click will decrease the Help/Note size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Label

The Label object inserts a label in a field cell to identify another element on the page.

Here's how it looks in the Toolbox:

So Where Do We Use It?

A label can help you name, clarify or identify fields or objects.

Add a Label

A Label can be added to a screen from the Toolbox on the design screen page.
To add a Label, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Label object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Label

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Label or go to an existing Label in the design screen.
4. Click **Edit** in the upper-right corner of the Label object you wish to edit.
5. The Label Properties Wizard appears.
6. Enter *Caption*.
7. Click **Advanced Options** (Optional); otherwise click **Save & Close**.

If you opted to show additional features, you can:

1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
4. Uncheck the *Use default font* size box and enter a font size in the corresponding.
5. Check the *Underlined* box for the caption to be underlined.
6. Check the *Italic* box for the caption to appear in italics.
7. Check the *Bold* box for the caption to appear in bold.
8. Check the *Hidden* box if you want to hide the object.
9. Enter a *Hover Help Tip,* if applicable.
10. Click **Save & Close**.
11. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.

B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Label

1. Follow the steps to Edit an Existing.
2. Find the Label you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Label you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Label Size

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Label or go to an existing Label in the design screen.
3. Click the '↔' icon in the upper-right corner of the Label you wish to resize. With each click, the Label will grow to occupy the cell to the right. Once the Label has occupied all cells in its row, the next click will decrease the Label size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Picture

The Picture object inserts a picture or logo from a file or website into a field cell. It is useful if you wish to add pictures to your Method account to show a particular item for clarification, etc.

Here's how it looks in the Toolbox:

So Where Do We Use It?

Use the Picture object anywhere you wish to display a picture on a screen.

Add a Picture

A Picture can be added to a screen from the Toolbox on the design screen page. To add a Picture, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.

3. Click and drag the Picture object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Picture

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Picture or go to an existing Picture in the design screen.
4. Click **Edit** in the upper-right corner of the Picture object you wish to edit.
5. The Picture Upload Wizard appears.

Step 1 of 2: Upload a Picture

1. Select the *Upload a new image* radiobox or *Reference an image from a web site* radiobox option.
2. Click **Next**.

Step 2 of 2: Upload a Picture

1. If *Upload a new image* was selected in step 1 of 2: Upload a Picture, then follow steps 2 to 7, otherwise skip to step 8.
2. Enter Name of Logo.
3. Click **Browse** to search for the image you wish to upload.
4. Click **Upload Image.**
5. The uploaded image appears in the wizard.
6. To resize the image, select the appropriate size from the Resize By dropdown list.
7. Click **Finish** and proceed to step 13.
8. If *Reference an image from a web site* was selected in step 1 of 2: Upload a Picture, then follow these steps.
9. Enter Name of Logo.
10. Enter file location by typing in the URL of the image. *Note: To find the URL of an image from a website using Internet Explorer, right-click the image > Properties. The Address (URL) is displayed in the Properties window. Copy and paste the address into the Enter file location field.*
11. Click **Save Image**.
12. Click **Finish**.
13. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Picture

1. Follow the steps to Edit an Existing.
2. Find the Picture you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Picture you wish to delete.

4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Picture Size

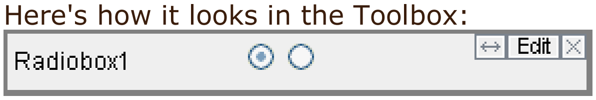
1. Follow the steps to Edit an Existing Screen or Add a New.
2. Add a Picture or go to an existing Picture in the design screen.
3. Click the '↔' icon in the upper-right corner of the Picture you wish to resize. With each click the Picture will grow to occupy the cell to the right. Once the Picture has occupied all cells in its row, the next click will decrease the Picture Object size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Radiobox

The Radiobox object inserts a Radiobox in a field cell.

Here's how it looks in the Toolbox:



So Where Do We Use It?

Radioboxes can be used anywhere you would like to include a yes/no, on/off or true/false statement.

Add a Radiobox

A Radiobox can be added to a screen from the Toolbox on the design screen page. To add a Radiobox, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Radiobox object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Radiobox

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Radiobox or go to an existing Radiobox in the design screen.
4. Click **Edit** in the upper-right corner of the Radiobox object.
5. The Radiobox Properties Wizard appears. The wizard is divided into 3 steps that follow:

Step 1 of 3: Radiobox Object Properties

1. Enter *Caption*.
2. Select *Caption location* from the dropdown list.

   The choices are:
   - Top
   - Left
   - Right
   - None

3. Enter *Default va*lue, if applicable.
4. Click **Advanced Options** (Optional); otherwise click **Next** and proceed to Step 2 of 3: Radiobox Actions.

If you opted to show additional features, you can:

1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Select *Text forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
4. Select *Text backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
5. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
6. Uncheck the *Use default font* size box and enter a font size in the corresponding.
7. Check the *Underlined* box for the caption to be underlined.
8. Check the *Italic* box for the caption to appear in italics.
9. Check the *Bold* box for the caption to appear in bold.
10. Check the *Hidden* box if you want to hide the object.
11. Enter *Hover Help Tip*, if applicable.
12. Click **Next**.

Step 2 of 3: Radiobox Actions

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list.

   The choices are:
   - Lose Focus
   - Gain Focus
   - Selection Change
   - Text Change

3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Next**.

Step 3 of 3: Radiobox Choices

1. Enter *choices* (1 per line).
2. Select to display as horizontal or vertical.
3. Click **Finish**.
4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Radiobox

1. Follow the steps to Edit an Existing Screen.
2. Find the Radiobox you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Radiobox you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Radiobox Size

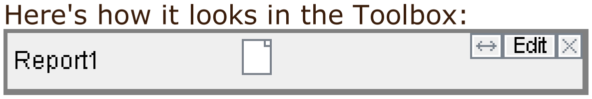
1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. [Add a Radiobox] or go to an existing Radiobox in the design screen.
3. Click the '↔' icon in the upper-right corner of the Radiobox you wish to resize. With each click, the Radiobox will grow to occupy the cell to the right. Once the Radiobox has occupied all cells in its row, the next click will decrease the Radiobox size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Report

The Report object allows you to create printable and exportable business forms, reports, and charts using Method Report Designer. For example, you could add an invoice for printing and exporting. These reports are displayed as embedded reports on the screens.

Here's how it looks in the Toolbox:



So Where Do We Use It?

Use this object for adding reporting functionality and generating reports for virtually any data stored in Method.

Add a Report

A report can be added to a screen from the Toolbox on the design screen page.
To add a report, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Report object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Report

1. Follow the steps to Edit an Existing Screen or Add a New.
2. Click **Add Objects** from the Toolbox.
3. Add a Report or go to an existing Report in the design screen.
4. Click **Edit** in the upper-right corner of the Report object.
5. The Report Properties Wizard Appears. The wizard is divided into 3 steps that follow:

Step 1 of 3: Choose Report

1. Enter a *Report Caption*.
2. Select the *Report Format*.
3. Enter the *Height* (Optional).
4. To Add, Edit or Delete a report, click **Open Report Designer**. Or select a Report from your Report Library by clicking the name of the appropriate report.
5. Click **Next**.

Step 2 of 3: Filter Options

To create a filter (Optional) for your report:

1. Select an option for the *Choose from a list of Tables to be used on the Report* from the dropdown list.
2. Select an option for the *Choose from a list of available field's* dropdown list.
3. Click **Insert Filter**.
4. Select a condition for the field you selected to filter the report by from the dropdown list.

   The choices are:
   - Contains – displays all records that contain specified criteria.
   - Does not contain – displays all records that do not contain specified criteria.
   - Equal to – displays all records that match exactly.
   - Is not equal to – displays all records that don't match the criteria.
   - Starts with – displays all records that start with specified criteria.
   - Ends with – displays all records that end with specified criteria.

- Is empty – displays all fields that contain no data.
- Is not empty – displays all fields that contain data.
- Build selection list – displays results based upon specified criteria.

5. If you selected *Is empty*, or *Is not empty* for Step 4, skip to Step 9; otherwise proceed to Step 6. If you selected *Build Selection List*, enter in the values for your list. If you select *Type In*, enter your values and skip to step 9; otherwise go to step 6.
6. Select *Get value from* in the dropdown list.

   The choices are:
   - Type In – sets the condition to a user-defined action result.
   - Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.
   - Value From Session – sets the condition to a value that results from the current session information.
   - Get Value From Shared Result – sets the condition to a value assigned to a shared result.

7. If you selected *Type In* or *Get Value From Shared Result* for Step 6, manually enter the value or name of the shared result, then skip to Step 9; otherwise select *value* from the dropdown list below.
8. Click **Save & Close**.

Step 3 of 3: Confirmation

1. Review the specifics of your report for accuracy.
2. Click **Finish**.
3. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Report

1. Follow the steps to Edit an Existing Screen.
2. Find the report you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the report you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Report Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Report or go to an existing Report in the design screen.
3. Click the '↔' icon in the upper-right corner of the Report you wish to resize. With each click, the Report will grow to occupy the cell to the right. Once the

Report has occupied all cells in its row, the next click will decrease the Report size to only the cell it was originally placed in.

4. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Textbox

The Textbox object inserts a field which allows the user to enter characters of text – letters, numbers, punctuation, etc.

Here's how it looks in the Toolbox:

So Where Do We Use It?

The Textbox object can be used for instances of data entry where text values are required.

Add a Textbox

A Textbox can be added to a screen from the Toolbox on the design screen page. To add a Textbox, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Textbox object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Textbox

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Add a Textbox or go to an existing Textbox in the design screen.
4. Click **Edit** in the upper-right corner of the Textbox object you wish to edit.
5. The Textbox Properties Wizard Appears. The wizard is divided into 3 steps that follow:

Step 1 of 3: Textbox Properties

1. Enter *Caption*.
2. Select *Caption location* from the dropdown list.

    The choices are:

- Top
- Left
- Right
- None

3. Enter *Default va*lue, if applicable.
4. Click **Advanced Options** (Optional); otherwise click **Next** and proceed to Step 2 of 3: Textbox Actions.

If you opted to show additional features, you can:

1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Select *Text forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
4. Select *Text backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
5. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
6. Uncheck the *Use default font size* box and enter a font size in the corresponding field.
7. Check the *Underlined* box for the caption to be underlined.
8. Check the *Italic* box for the caption to appear in italics.
9. Check the *Bold* box for the caption to appear in bold.
10. Enter *Number of input lines* desired.
11. Enter the number of *Max Characters.*
12. Check *Show In HTML Editor*: to show the HTML Editor in the Textbox. Uncheck *Show In HTML Editor*: to show a plain Textbox object.
13. Check the *Hidden* box if you wish for the *object* to be hidden.
14. Check the *Read Only* box if you wish to not allow the object to be edited.
15. Enter *Hover Help Tip*, if applicable.
16. Click **Next**.

Step 2 of 3: Textbox Actions

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list.

   The choices are:
   - Lose Focus
   - Gain Focus
   - Text Change

3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Next**.

Step 3 of 3: Textbox Validation Rules

1. Select *Condition* from the dropdown list.

   The choices are:
   - Contains – requires value to contain specified criteria.
   - Does not contain – value cannot contain specified criteria.
   - Equal to – value must match criteria.
   - Is not equal to – value cannot match criteria.
   - Starts with – value must start with specified criteria.

- Ends with – value must end with specified criteria.
- Is empty – value must be empty.
- Is not empty – value cannot be empty.
- Build selection list – value can be found in the selection list.

2. If you selected *Starts with*, *Ends with*, *Is empty*, or *Is not empty* for Step 1, skip to Step 4; if you selected *Build selection list* for Step 1, type values into selection list then skip to Step 4. Otherwise, select value from dropdown list.

   The choices are:
   - Type In – sets the condition to a user-defined action result.
   - Value From Screen– sets the condition to a value pulled from a specific field within the specified screen.

3. If you selected *Type In* for Step 2, skip to Step 4; otherwise select from the dropdown list below.
4. Click **Add Validation Rule.**
5. Click **Finish**.
6. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Textbox

1. Follow the steps to Edit an Existing Screen.
2. Find the Textbox you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Textbox you wish to delete.
4. Click **OK** when prompted to confirm.

5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Textbox Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Textbox or go to an existing Textbox in the design screen.
3. Click the '↔' icon in the upper-right corner of the Textbox you wish to resize. With each click, the Textbox will grow to occupy the cell to the right. Once the Textbox has occupied all cells in its row, the next click will decrease the Textbox size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.

C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Timer

The Timer object inserts a stopwatch type object allowing the user to start, pause, stop and track elapsed time. This is especially important for time tracking or time-billing.

Here's how it looks in the Toolbox:

So Where Do We Use It?

This action is useful for tracking the amount of time spent on tasks and could be particularly useful for tracking time-billing information.

Add a Timer

A Timer can be added to a screen from the Toolbox on the design screen page. To add a Timer, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the Timer object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a Timer

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. [Add a Timer](#) or go to an existing Timer in the design screen.
4. Click **Edit** in the upper-right corner of the Timer object you wish to edit.
5. The Timer Properties Wizard appears. The wizard is divided into 3 steps that follow:

Step 1 of 3: Timer Properties

1. Enter *Default Value*.
2. Select *Border Style* from the dropdown list.

   The choices are:
   - Solid
   - Dotted
   - Dashed
   - Double
   - Groove
   - Ridge

- Inset
- Outset

3. Select *Border Color* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
4. Enter *Border Width (pixels)*.
5. Click **Advanced Options** to show *Advanced Options*; otherwise click **Next** and proceed to Step 2 of 3: Timer Actions.

If you opted to show additional features, you can:

1. Select *Text forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Text backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
4. Uncheck the *Use default font size box* and manually enter a font size in the corresponding field.
5. Check the *Underlined* box for the caption to be underlined.
6. Check the *Italic* box for the caption to appear in italics.
7. Check the *Bold* box for the caption to appear in bold.
8. Enter *Width* (pixels).
9. Check the *Hidden* box if you wish for the object to be hidden from the screen.
10. Enter *Hover Help Tip*, if applicable.
11. Click **Next**.

Step 2 of 3: Timer Actions (Optional)

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list.

   The choices are:
   - On Start
   - On Pause
   - On Stop
   - On Reset
   - On Time Interval

3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Next**.

Step 3 of 3: Timer Rules

1. *Enter the Time Interval in Seconds*.
2. *Check* the checkbox labeled *The Timer is editable* if you want the user to be able to edit the time displayed. If you do not want users to edit this section, leave the box *unchecked*.
3. Click **Finish**.
4. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a Timer

1. Follow the steps to Edit an Existing Screen.
2. Find the Timer you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the Timer you wish to delete.
4. Click **OK** when prompted to confirm.

5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the Timer Size

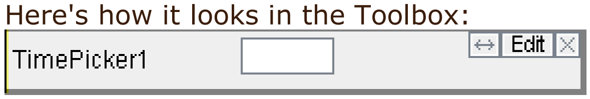
1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a Timer or go to an existing Timer in the design screen.
3. Click the '↔' icon in the upper-right corner of the Timer you wish to resize. With each click, the Timer will grow to occupy the cell to the right. Once the Timer has occupied all cells in its row, the next click will decrease the Timer size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

TimePicker

The TimePicker object inserts a time picker dropdown allowing the user to select a specific time to appear in a data field. This is especially important for time tracking or time-billing.

Here's how it looks in the Toolbox:



So Where Do We Use It?

This action is useful when scheduling appointments in Method or when entering in time-billing information.

Add a TimePicker

A TimePicker can be added to a screen from the Toolbox on the design screen page. To add a TimePicker, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the TimePicker object to the desired cell in the design screen.
4. Release the mouse button.

5. To finish, select the appropriate option below:

    A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
    B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
    C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a TimePicker

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Add a TimePicker or go to an existing TimePicker in the design screen.
4. Click **Edit** in the upper-right corner of the TimePicker object you wish to edit.
5. The TimePicker Properties Wizard appears. The wizard is divided into 4 steps that follow:

Step 1 of 4: Date/Time Properties

1. Enter *Caption*.
2. Select *Caption location* from the dropdown list.

    The choices are:
    - Top
    - Left
    - Right
    - None

3. Check the *Use today's date/time* box to set the default date as the current date and time.
4. Uncheck the *Use today's date/time* box to set the default time manually.
5. Click **Advanced Options** to show *Advanced Options*; otherwise click **Next** and proceed to Step 2 of 4: Date/Time Actions.

If you opted to show additional features, you can:

1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Select *Text forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
4. Select *Text backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
5. Check the *Use default font size* box to use the pre-assigned font size selected for your Method account.
6. Uncheck the *Use default font size box* and manually enter a font size in the corresponding field.
7. Check the *Underlined* box for the caption to be underlined.
8. Check the *Italic* box for the caption to appear in italics.
9. Check the *Bold* box for the caption to appear in bold.
10. Check the *Hidden* box if you wish for the object to be hidden from the screen.
11. Check the *Read Only* box if you wish to not allow the object to be edited.
12. Enter *Hover Help Tip*, if applicable.
13. Click **Next**.

Step 2 of 4: Date/Time Actions (Optional)

1. Fill the **Add Action** or **Copy Action** button.
2. Select *Event* from the dropdown list, the only option is *DateChanged*.
3. Select *Action* from the dropdown list.
4. Click **Add Action** (See Method Actions Reference Guide for assistance).
5. Click **Next**.

Step 3 of 4: Date/Time Validation Rules (Optional)

1. Select *Condition* from the dropdown list.

   The choices are:
   - Contains – requires value to contain specified criteria.
   - Does not contain – value cannot contain specified criteria.
   - Equal to – value must match criteria.
   - Is not equal to – value cannot match criteria.
   - Starts with – value must start with specified criteria.
   - Ends with – value must end with specified criteria.
   - Is empty – value must be empty.
   - Is not empty – value cannot be empty.
   - Build selection list – value can be found in the selection list.

2. If you selected *Is empty* or *Is not empty* for Step 1, skip to Step 4; if you selected *Build selection list* for Step 1, enter values and skip to Step 4. Otherwise, select *Value* from the dropdown list.

   The choices are:
     - Type In – sets the condition to a user-defined action result.
     - Value From Screen – sets the condition to a value pulled from a specific field within the specified screen.

3. If you selected *Type In* for Step 2, enter predefined value and proceed to step 4. Otherwise, select value from the dropdown list below.
4. Click **Add Validation Rule**.
5. Click **Next**.

Step 4 of 4: Date/Time Formatting (Optional)

1. Check the appropriate checkboxes next to the *Format* you wish to display dates and times; check all that apply.

   The choices are:
   - Show Date and Time
   - Display Time Only
   - Always show current time?
   - Override default time of day to

2. Click **Finish**.
3. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a TimePicker

1. Follow the steps to Edit an Existing Screen.
2. Find the TimePicker you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the TimePicker you wish to delete.
4. Click **OK** when prompted to confirm this action.
5. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the TimePicker Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a TimePicker or go to an existing TimePicker in the design screen.
3. Click the '↔' icon in the upper-right corner of the TimePicker you wish to resize. With each click, the TimePicker will grow to occupy the cell to the right. Once the TimePicker has occupied all cells in its row, the next click will decrease the TimePicker size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

WebPageWindow

The WebPageWindow object inserts a window that displays a user-defined webpage on the screen.

Here's how it looks in the Toolbox:

So Where Do We Use It?

The WebPageWindow would be used when you would like users to be able to view an external website on a screen, for instance a map to a location, or a partner firm's website.

Add a WebPageWindow

A WebPageWindow can be added to a screen from the Toolbox on the design screen page. To add a WebPageWindow, follow these steps:

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Click and drag the WebPageWindow object to the desired cell in the design screen.
4. Release the mouse button.
5. To finish, select the appropriate option below:

A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Edit a WebPageWindow

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Click **Add Objects** from the Toolbox.
3. Add a WebPageWindow or go to an existing WebPageWindow in the design screen.
4. Click **Edit** in the upper-right corner of the WebPageWindow object you wish to edit.
5. The WebPageWindow Properties Wizard appears.
6. Enter the *Caption*
7. Select *Caption location* from the dropdown list.

   The choices are:
   - Top
   - Left
   - Right
   - None

8. Enter the *Default URL*.
9. Click **Advanced Options** (Optional) to show additional features; otherwise click **Save & Close**.

If you opted to show additional features, you can:
1. Select *Caption forecolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
2. Select *Caption backcolor* by clicking the blank field. A color picker pops up, allowing you to select the color of your choice.
3. Enter *Width (pixels)*.
4. Enter *Height (pixels)*.
5. Check the *Hidden* box if you wish for the object to be hidden.
6. Click **Save & Close**.
7. To finish, select the appropriate option below:

   A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
   B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
   C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Delete a WebPageWindow

1. Follow the steps to Edit an Existing Screen.
2. Find the WebPageWindow you wish to delete in the design screen.
3. Click the **'X'** in the upper-right corner of the WebPageWindow you wish to delete.
4. Click **OK** when prompted to confirm.
5. To finish, select the appropriate option below:

A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.

Change the WebPageWindow Size

1. Follow the steps to Edit an Existing Screen or Add a New Screen.
2. Add a WebPageWindow or go to an existing WebPageWindow in the design screen.
3. Click the '↔' icon in the upper-right corner of the WebPageWindow you wish to resize. With each click, the WebPageWindow will grow to occupy the cell to the right. Once the WebPageWindow has occupied all cells in its row, the next click will decrease the WebPageWindow size to only the cell it was originally placed in.
4. To finish, select the appropriate option below:

A. If you are ready to activate your changes to the screen, but wish to keep the design screen open, click **Publish**.
B. If you are ready to activate your changes to the screen and wish to close the design screen, click **Save & Close**, then select **Ok**.
C. If you wish to close the design screen and not publish changes, click **Save & Close**, then select **Cancel**.