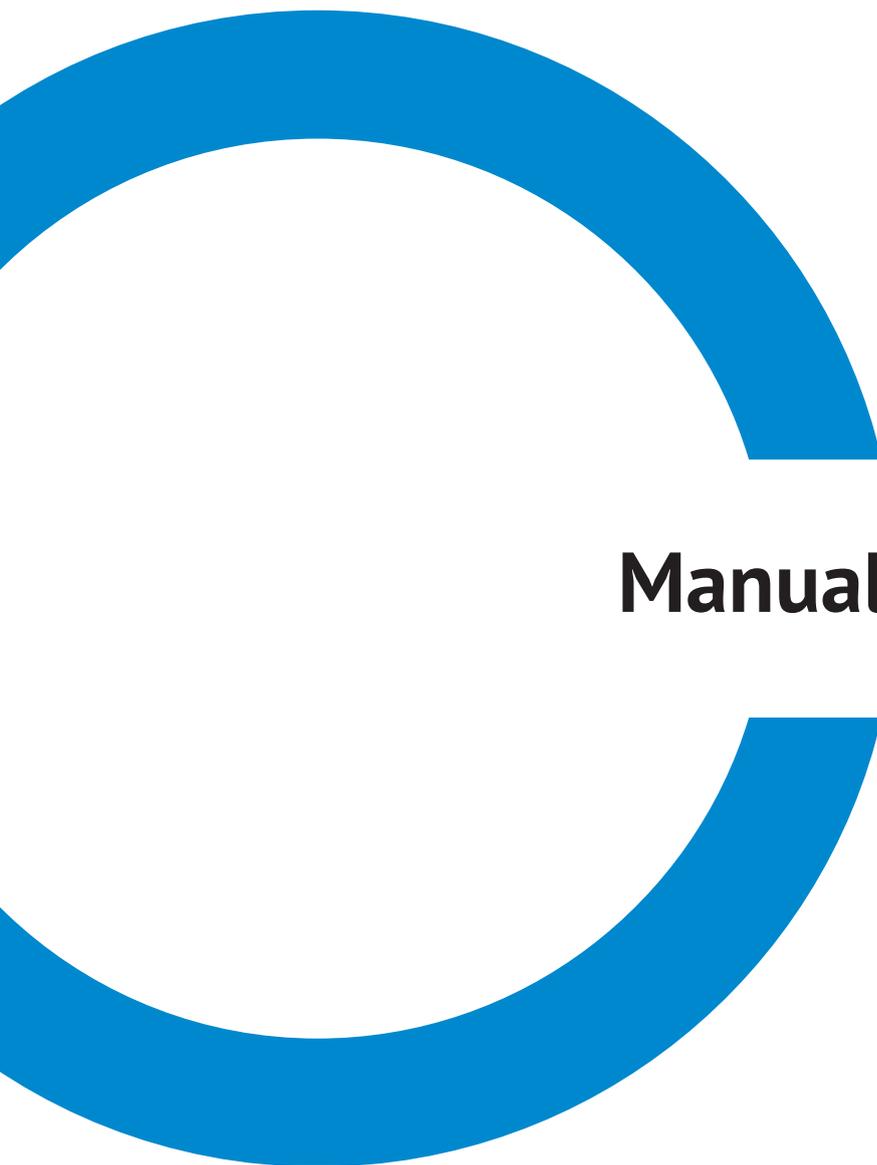


cobra[®]
CRM



Manual New Features

**New features
in
cobra CRM PLUS 2020
cobra CRM PRO 2020
cobra CRM BI 2020
Release 1**

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We accept no liability for changes, mistakes or printing errors.

The information in this document does not constitute an assurance of product characteristics. The range of functions of your product – depending on the cobra version you are using – may divert from the range of functions described and depicted here.

Edited by Roland Wehage and Astrid Winkle.

August 2020

www.cobra.de

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Important

This document describes the new features of cobra CRM BI and cobra CRM PRO and indicates the range of their functions and databases. Should you be working with a different version like cobra CRM PLUS, it might have a slightly different look-and-feel than shown here and have a restricted range of functions.

This is what you will not find in the current version any longer ...

- Up to now, we have included ZIP code lists for different countries such as France, Denmark etc. in our software. As of now, we shall only include ZIP codes for Germany, Austria and Switzerland. Additional ZIP code lists can be included in cobra by programming a plug-in.
- Up to now, we have offered telefax settings and fax in the User Settings as menu item with a message informing about the missing support, so these functions are now also not offered any longer.
- Support of Windows Address Books has been discontinued.

Installing the new Version, including the Data from the 2018 Version

For details on further ways of installing, configuring and migrating data please refer to the system manual and the installation instructions available as PDF files.



When installing a patch from the 2018 version to the 2020 version, the older version will be updated and, in the process, be completely overwritten. So there is no way for you to return to the 2018 version if you have not completely (!) backed up the 2018 version before.

To backup the system completely, proceed as follows:

1. Copy the complete server installation, including all files and sub-files, to a safe place.
2. In cobra 2018, save your SQL databases using the command »File: Data Backup: Database Backup«.

Patch-Installation to update cobra 2018 to cobra 2020

You have downloaded the patch file from our customer portal or have received it from cobra or your specialist dealer in some other way.

During the patch installation your existing cobra version 2018 will be updated to the 2020 version. All existing paths and settings will be taken over completely. This is why you cannot enter any new paths during a patch installation.

Please have your activation data for cobra 2020 at hand, since they will be required during the update.

- Close cobra 2018.
- Close the cobra Appointment Manager.

- Close Outlook.
- Double-click the patch file. Patch installation will begin. During installation, the existing cobra 2018 will be detected automatically.
- Follow the Wizard steps.

New Features for Your Daily Tasks

System Settings

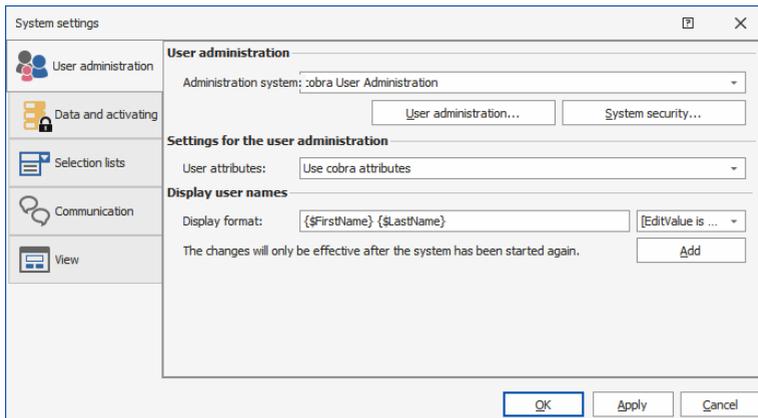
Look and Feel

The system settings have been revised for better usability. There have also been some functional modifications.

User Administration

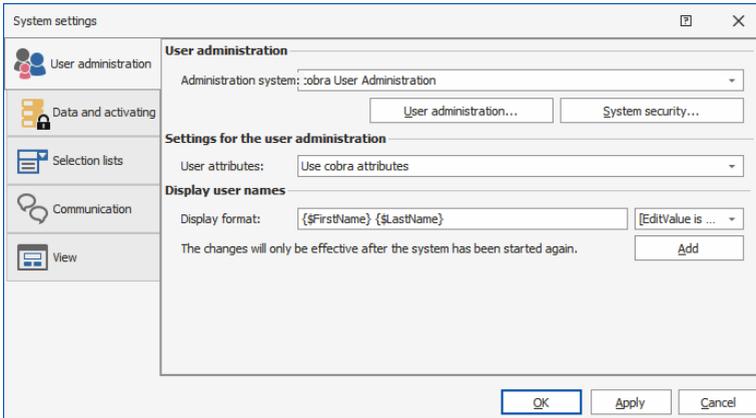
User administration has been rebuilt completely.

- Issue the command »File: System settings: System settings«.

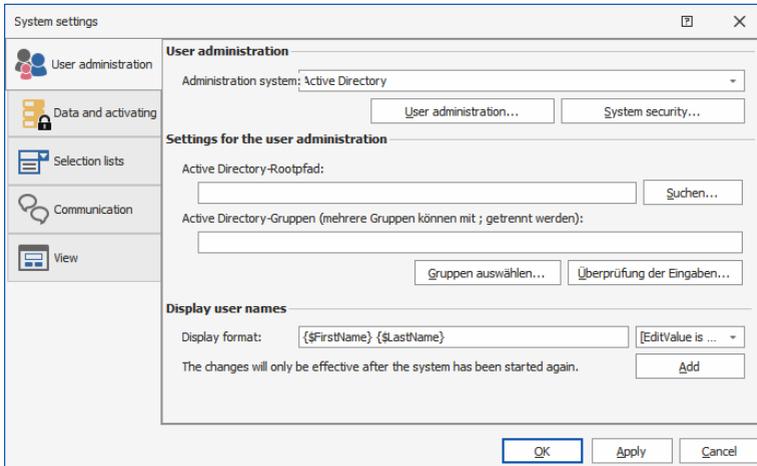


- Go to the »User administration« tab.
- There, select the administrative system.

- None** If you select this option, log-in information will not be requested at start-up. Any person starting the software will be signed-in as user »Guest« and has system administrator rights. This function has the same effect as deactivating »Request login« in former versions of cobra.
- cobra** You are using the cobra user administration described below.
- Windows** The name of the currently logged-on user will be used for login. Users and groups will be administrated as described for the cobra user administration below.



Active Directory You will be using the Active Directory as user administration. The name of the user will be taken over from Windows if the user is in one of the groups named in the Active Directory.

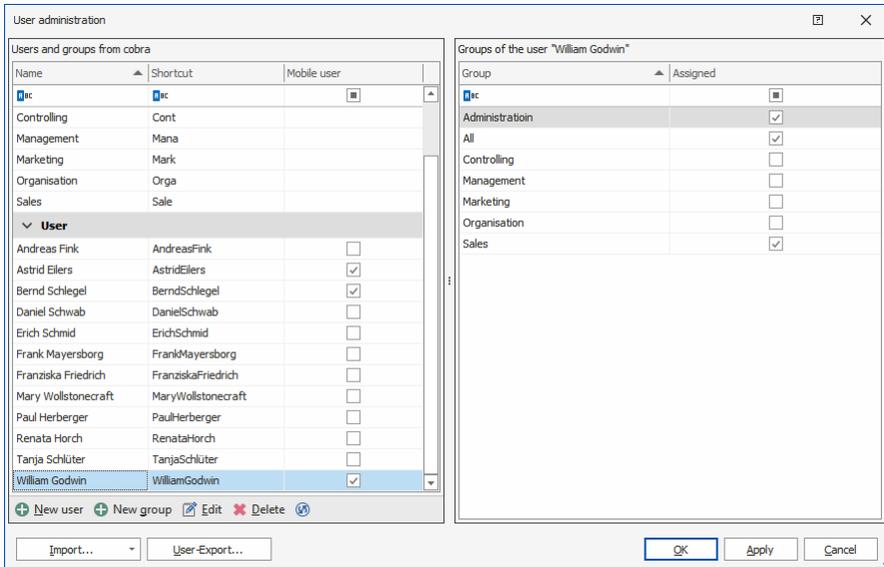


User administration with cobra

Here you can enter users and groups and match them.

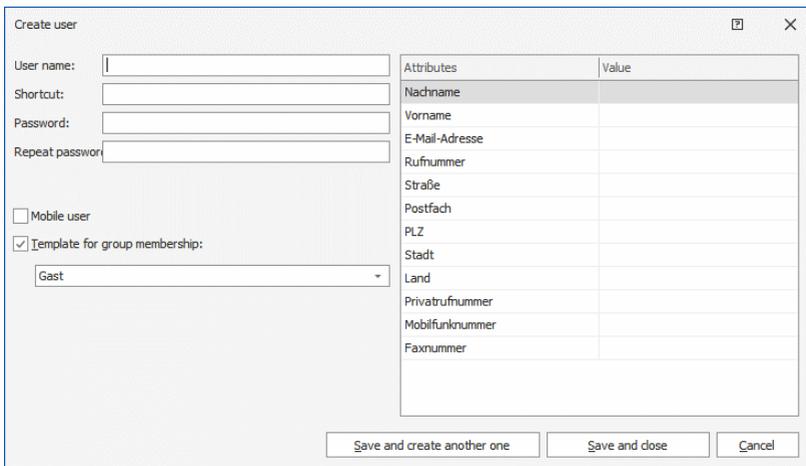
- In the »System settings«, click the »User administration« button.

New Features for Your Daily Tasks



New User

In this dialog, you can collect information about individual users. This includes user attributes you can use, e.g. for writing letters.



Editing User Data

You can reset the user password.

- To edit a user account, open it. To do so, double-click the user in the list or click the »Edit« button.
- Click the »Reset password« button.

Attributes	Value
Nachname	Godwin
Vorname	William
E-Mail-Adresse	william.godwin@cobra.com
Rufnummer	
Straße	
Postfach	
PLZ	
Stadt	
Land	
Privatrufnummer	
Mobilfunknummer	
Faxnummer	

- Assign the user a different password.

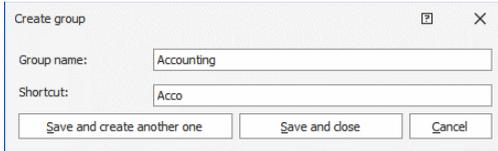
Users may also change their own password.

- To do so, issue the command »File: User-specific settings: General: Change login password«.

You can also edit the user name and the user attributes. However, the user shortcut cannot be changed once it has been assigned.

New Group

A group consists of a name and a shortcut. Group memberships serve to simultaneously assign or revoke specific rights to several users.



The screenshot shows a 'Create group' dialog box. It has a title bar with a question mark icon and a close button. The dialog contains two text input fields: 'Group name:' with the value 'Accounting' and 'Shortcut:' with the value 'Acco'. At the bottom, there are three buttons: 'Save and create another one', 'Save and close', and 'Cancel'.

Editing a Group

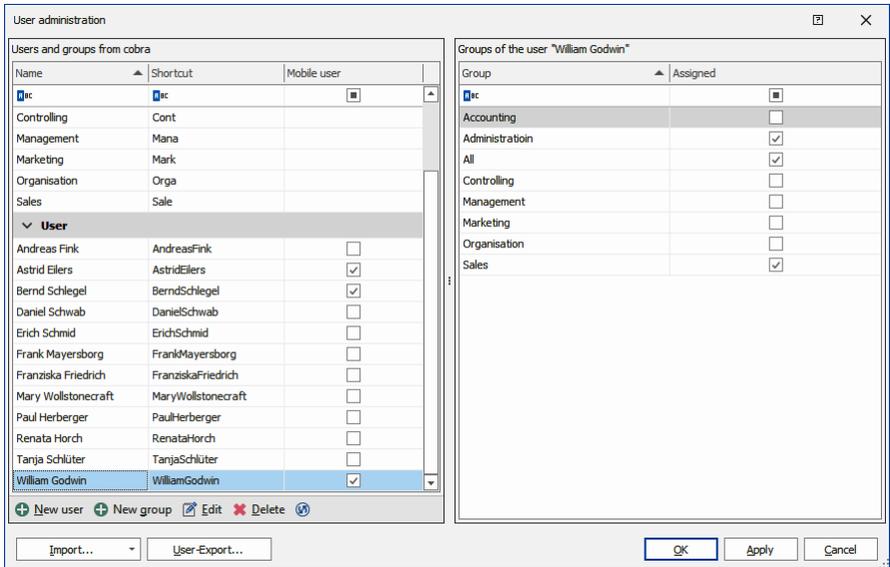
You can change the name - but not the shortcut - of a group.

- Open a group for editing. To do so, double-click the Group in the list or click the »Edit« button.

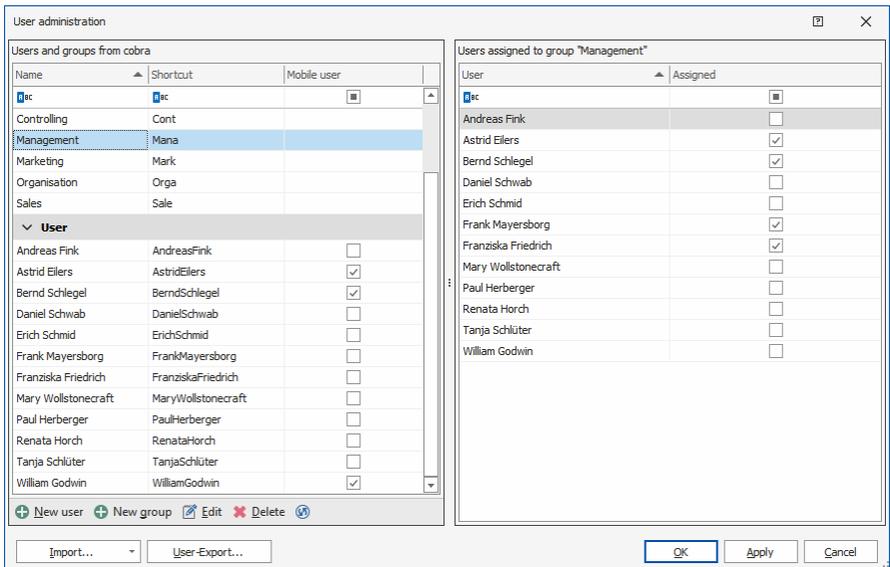
Matching Users and Groups

You can assign an individual user specific groups as well as a group specific users.

- if you click a *User*, you will see a list of all groups available at the right. Click those groups the user is to belong to.



- If you click a *Group*, you will see a list of all users available at the right. Click those users to be added to this group.



Exporting Users

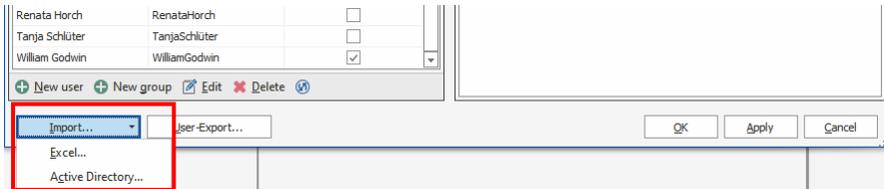
You can export users to an Excel file (*.xlsx) and also re-import them.

- In the User administration, click the »User-Export« button.
- Specify where the file is to be stored.



User name and user shortcut are listed in the Excel file. Additional details such as user attributes or group membership will not be exported.

Import Users



- Users can be imported from an Excel file.
- Users can be taken over directly from the Active Directory. To do so, enter the root path as well as the groups to be imported.

Displaying User Names

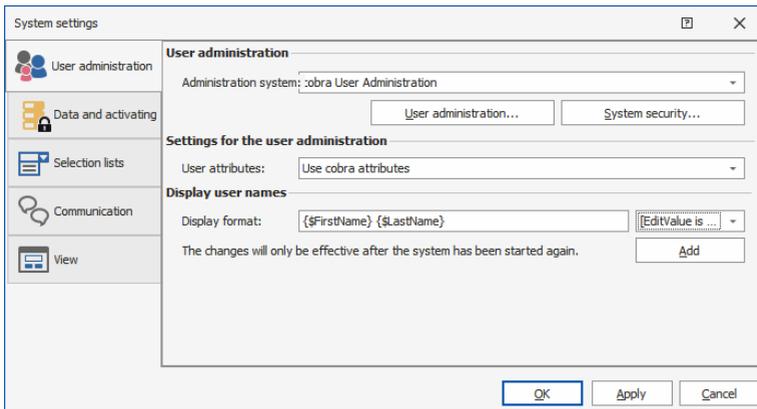
In the system settings you can specify in which format user names are to be displayed in the software. Should you not specify a specific format, the user shortcut will be used automatically.

- Issue the command »File: System settings: System settings«.
- Go to the »User administration« tab.

You can take over specific field contents from the user attributes into the user names as well as add free texts.

Display format... In this field you can compile the name format you want displayed. On the right-hand side you can see a selection list of the user attributes. To take over an attribute into the display format,

- place the cursor in the field,
- click the attribute in the list and confirm by clicking »Add«.
- You can also add free text [»(cobra)« in the following figure].



- Start cobra again.

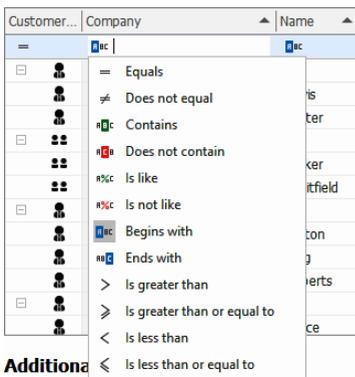
In various instances of cobra the user name will be displayed as specified here. If this field remains empty, the shortcut entered in the user administration will be shown.

Filter

Table Filter

In the 2018 version tables showed the »Starts with« option in the filter line to begin filtering. In addition, functions such as *Filtering were provided.

In the 2020 version, these filter options were replaced by an expanded selection. You can access the selection by selecting the symbol at the beginning of the filter line. On delivery, it is set to »Begins with«, see the following figure:



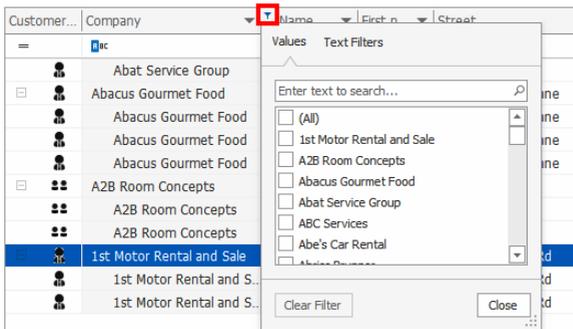
If the icon is selected as described, a list of the filters available will open. Select the filter you want.

cobra will save the setting and retain it as long as it is not changed, even if cobra is restarted.

Quick Filter Selection

Additional quick filters are offered as of CRM Plus in the 2020 version. To configure one of these quick filters, place the mouse on a table column without clicking it. The column is then highlighted by color. Simultaneously a second icon will be visible besides the sorting icon.

Address list



If you click this icon, a new window opens with a list of the filters.

Depending on the type of field (date, text, number...) that list will look differently.

Filtering by Current User

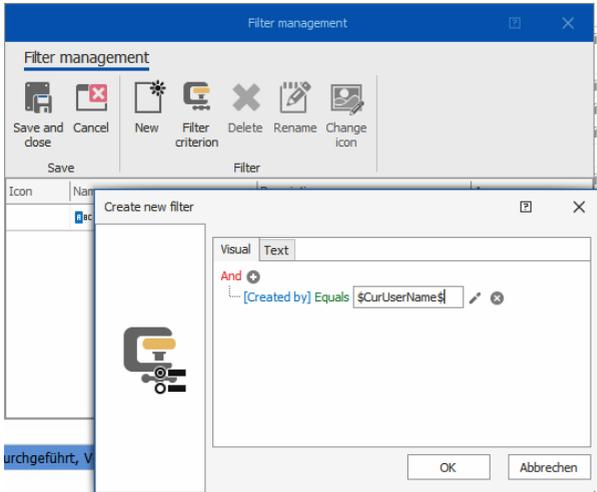
In the 2020 version, you can set filtering by the current user in the filter management options. Thus you can e.g. filter by addresses created by the current user.

- Set the focus in a table.
- Select the »Table« menu item.
- In the »Filter« section call »Management«.

The filter management window will open.

Here you can e.g. create a new filter using the »New« icon or modify the filter criterion for an existing filter using the »Filter criterion« icon.

Another window will open. Here you can create the filter criterion as shown in the figure: `$CurUserName$`:



Save the filter and select the new filter in the filter list.

Entry Masks

Display Conditions

In the cobra 2020 version, displaying entry masks can be controlled by conditions. A condition consists of a name, the entry mask to be displayed, the mode the condition is to be valid in (new data record, edit data record, query), the condition itself and the option whether the condition is to be valid or not.

Conditions will be processed according to the sequence specified. If a condition is true, this entry mask will be displayed. If no condition is true, the default mask will be used.

Conditions are not valid if a specific entry mask is to be opened (if, e.g. a specific entry mask is to be opened via a button).

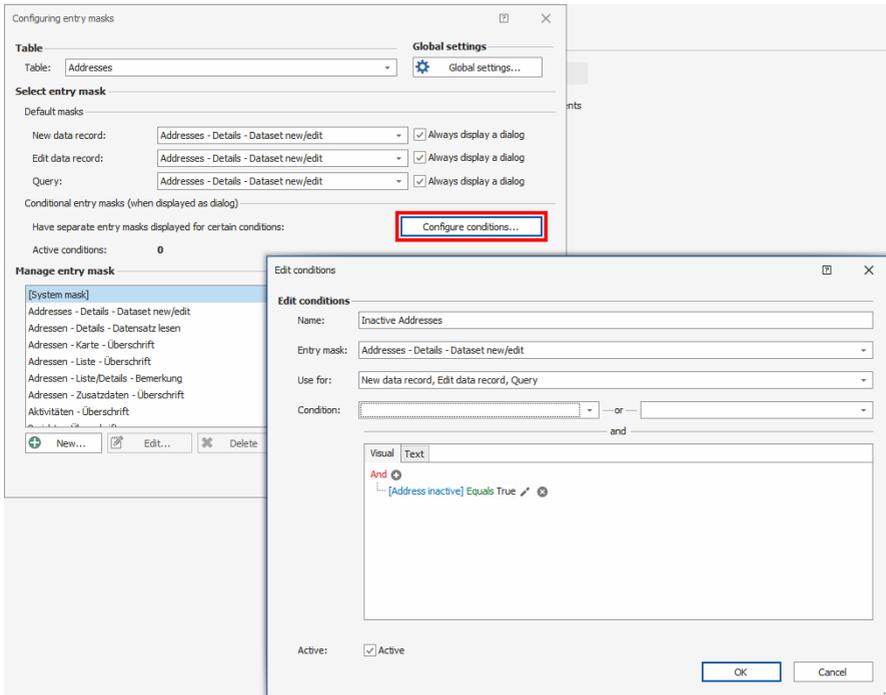
In cobra, a condition can be configured using the field contents of the data record or using groups and users.

- To activate the conditions for entry masks, click the »File« tab and then »View«.
- Here click »Select entry mask« and then »Configure conditions...«.

The dialog »Configure conditions for displaying entry masks« will open.

- To specify a condition, click the »New...« button in the »Configure conditions for displaying entry masks« dialog.

A new dialog will open where you can specify the conditions required.

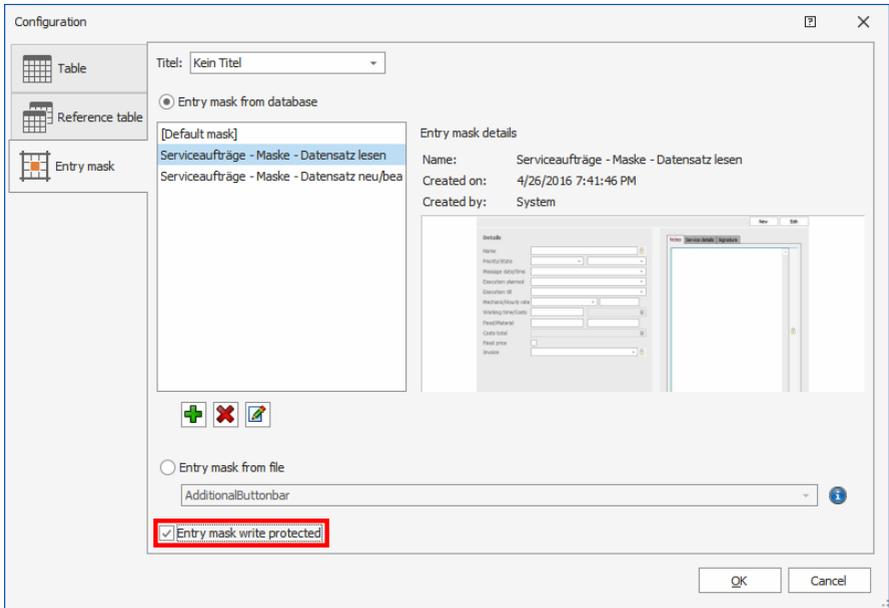


Read Only

Entry masks can be displayed as Read only in the 2020 version. The Read only feature is set in the view editor.

To do so, call the view editor, using either »Edit current view« or »Create new view«.

In the view editor, the »Entry mask« component can be dragged onto the view. The following dialog will open:



A checkbox »Entry mask read only« is in the third tab »Entry mask« at the end of the mask. To protect the entry mask, click the checkbox.

Entry Points for an Individual Letter

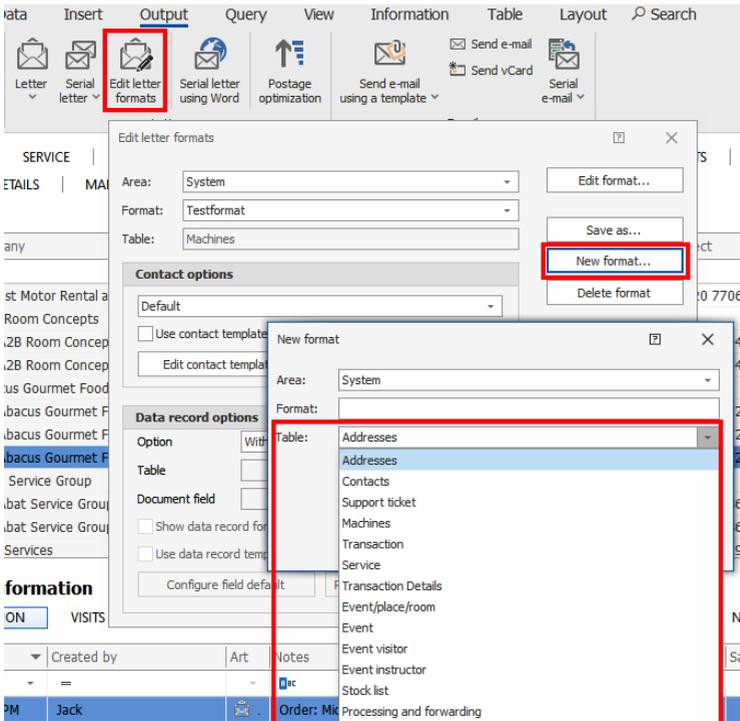
In the 2020 version, cobra CRM offers individual letter templates for all tables. Here you can edit the template of an individual letter and enter data from the table.

- In cobra, select the »Output« menu and in the »Letter« section the »Edit template« feature.

The »Selecting individual letter template« dialog will open.

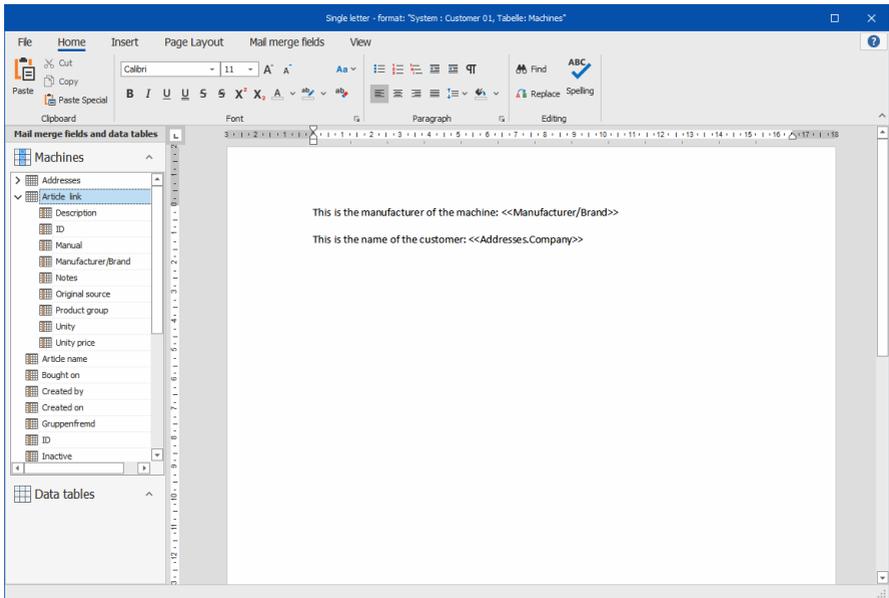
- Here, select the »New template« button.

A new dialog for »New template« will open. You can now select the table required in the »Table« selection list.

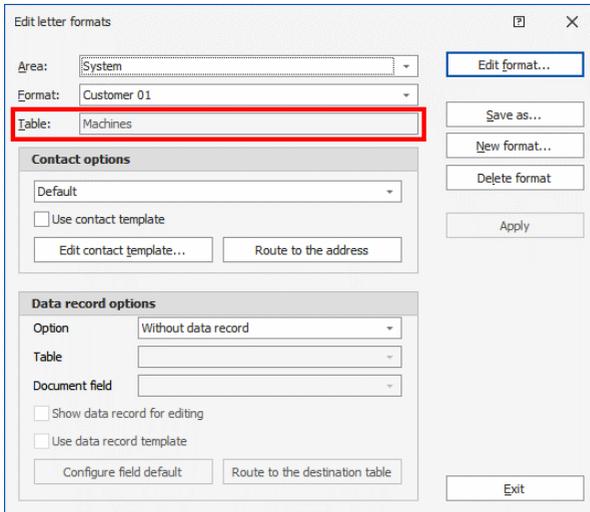


The single letter editor will open.

Here you can access parent tables:



If the template has been created previously, it will now be available in the »Template individual letter selection« dialog.



In addition, in the data record options you can specify that a data record is also created in a table linked to this one.

CSV Export/Import

In the 2020 version, cobra offers the option to import and export CSV (text) files in different formats.

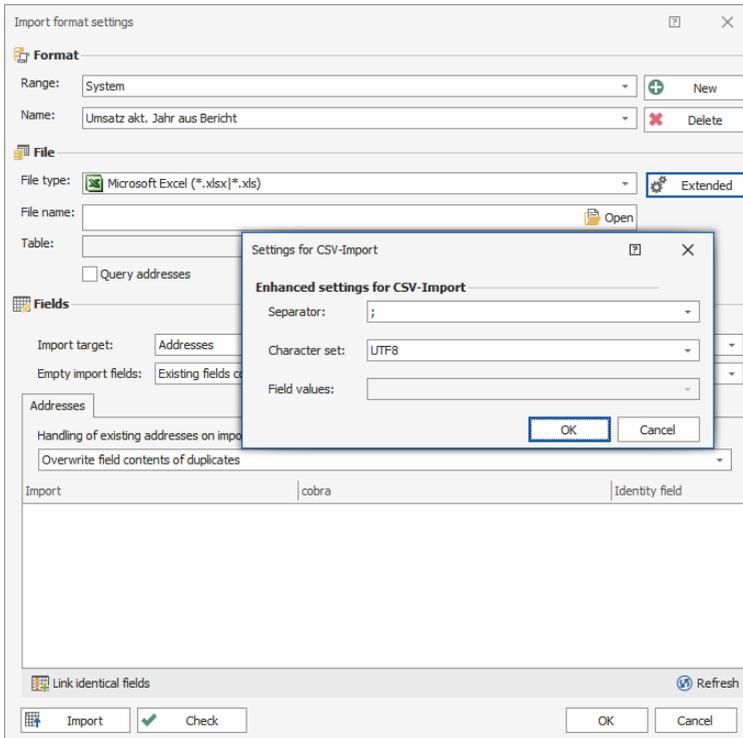
CSV Import

- To import CSV files, select the »Data« tab, there in the Data exchange feature the »Import« function.

The window »Import format settings« will open.

- In the »File« section, select Microsoft Excel (*.xlsx|*.xls|*.csv)« as file type.
- Then click the »Advanced« button.

The dialog »Settings for CSV import« will open:



In this dialog, select the separators and the character set. The CSV file to be imported can now be formatted and imported according to these specifications.

CSV Export

- To export CSV files, select the »Data« tab, there in the Data exchange feature the »Export« function.

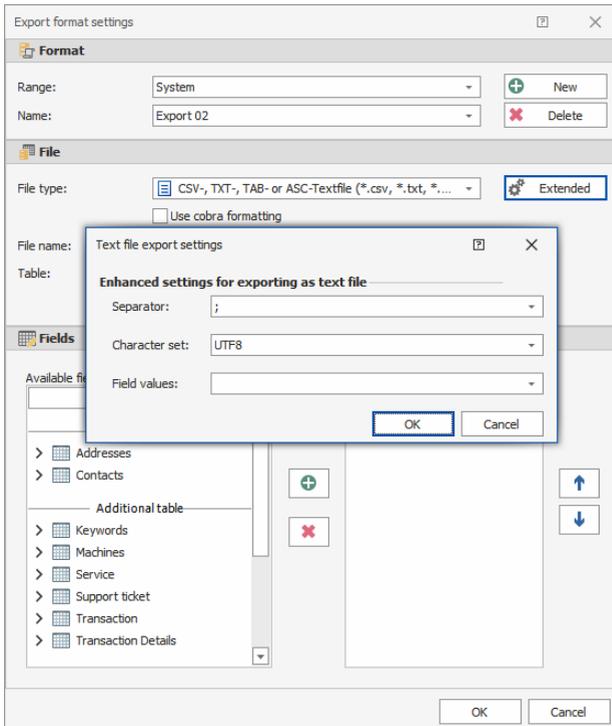
The window »Select format: Export« will open.

- In the »Format« section, beside the name selection, there is a button »...«. Click it.

The window »Export format settings« will open.

- In the »File« section you can select the file type: »CSV-, TXT-, TAB- or ASC-Textfile (*.csv, *.txt, *.tab, *.asc)«.
- Then click the »Advanced« button.

The dialog »Settings for export of text files« will open:



- In this dialog, select the separators, the character set and the field values.

The CSV Export file to be Export can now be formatted and exported according to these specifications.

Multiple Selection Lists

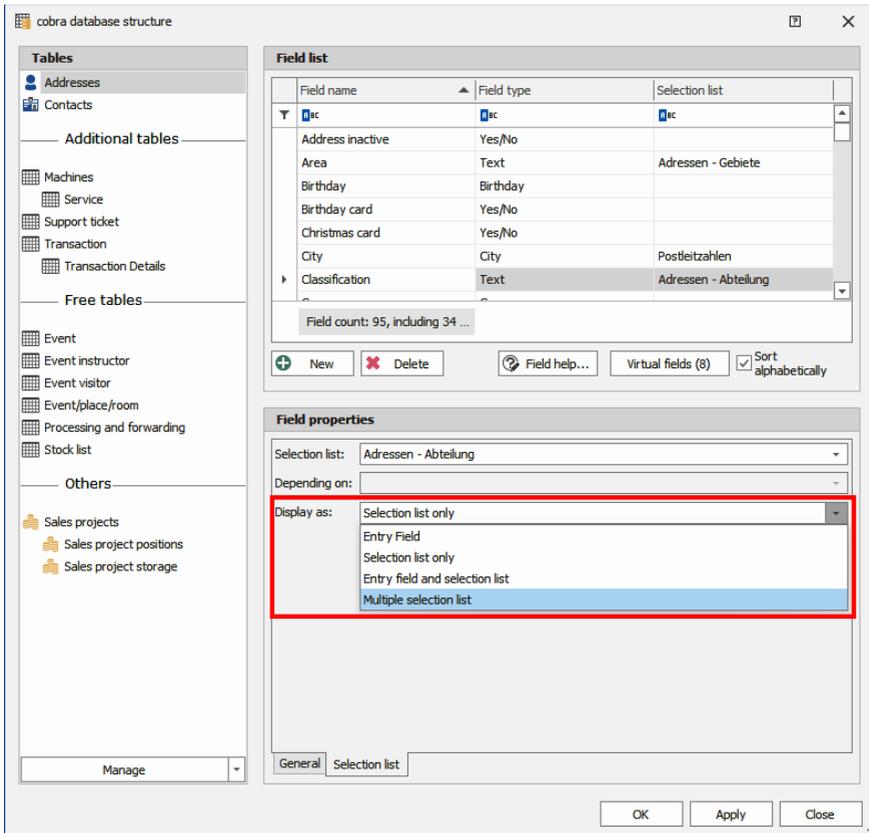
In the 2020 version, an additional option is offered for selection lists: the multiple selection list. A multiple selection list will now offer you the option to select different list items per checkbox. Thus you can select several items at once, i.e., select multiple items.

In the query function, a multiple selection list will be treated as an OR query.

- To create a multiple selection list, in cobra select an entry mask containing the field required.
- Click the »File« tab to call the new function.
- Then select »Database«.
- The function »Database structure dialog« is in the »Configuration« section. Select it.

New Features for Your Daily Tasks

In the Database structure dialog you can select »Multiple selection list« in the field properties of that field a multiple selection list has been assigned to or is to be assigned to:



In the example shown here the entry mask has the field »Department« in the »Addresses« table. In the multiple selection list you can now compile several properties:

Personal Data

In the 2020 version, an option was added to the export logging feature so that now you can precisely select which items are to be logged. In the 2018 version, logging could only be activated or deactivated generally. In the 2020 version it is now possible to differentiate further.

To activate overall logging, you can select the »Logging export of personal data and request reason as well as transferring aim« checkbox available in the »Export and transfer« section, just as in the 2018 version.

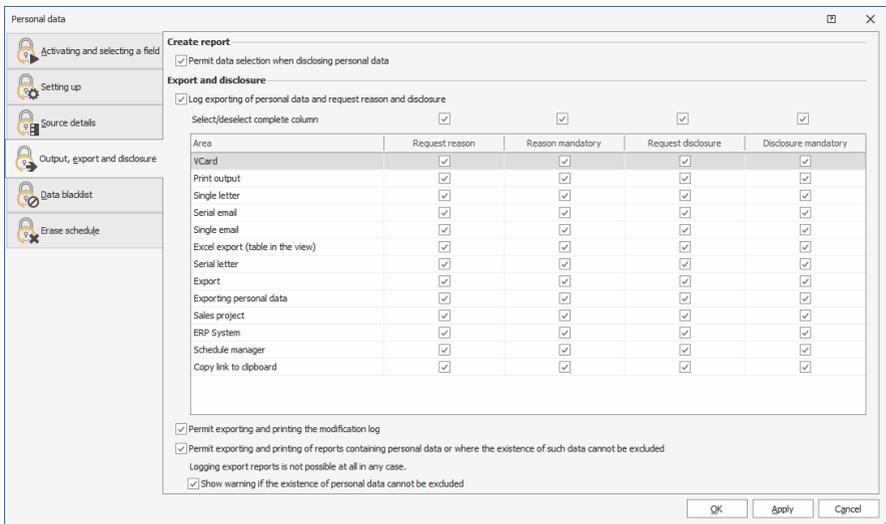
- Click the »File« tab to call the new function and then select »Database«.

- The »Personal data« feature is in the »Data« section. Select it.

A new window »Personal data« will open.

- As soon as personal data have been activated, on the left side select the menu item »Output, Export and Transfer«.

Now you can see the underlying table, grayed out up to now. Here you will find a list of all sections in which such a query was specified. You can now differentiate which queries you want logged. When the feature is activated for the first time, all checkboxes will have been selected and must be **desel-**ected individually or by column.



Encrypting Mails

cobra supports TLS 1.2 and TLS 1.3 encryption.

When configuring SMTP accounts, you can either specify mail encrypting yourself precisely or leave it to cobra CRM.

- Select the command »File: System settings: SMTP settings«.

To leave mail encrypting to cobra CRM, select »Automatic selection (recommended)«:

The screenshot shows the 'SMTP Accounts' configuration window. The 'Email information' section includes fields for E-mail address (smtp@cobra.de), Displayed name (SMTP (cobra)), Company/organization (cobra GmbH), and Reply e-mail address (info@cobra.de). The 'Server information' section has 'Authentication required' checked, with fields for User name (cobra@borges), Password (masked), and Outbox server (pop.cobra.de). Under 'Encryption', 'Automatic (recommended)' is selected. Below it, 'TLS-Mode' is also set to 'Automatic (recommended)'. A list of TLS versions (SSL 2, SSL 3, TLS 1.0, TLS 1.1, TLS 1.2) is visible. At the bottom, 'Standard SMTP account' is checked, and there are 'Ok' and 'Cancel' buttons.

The screenshot shows the same 'SMTP Accounts' configuration window. In the 'Encryption' dropdown, 'None' is selected. The 'TLS-Mode' dropdown is also set to 'None'. The list of TLS versions is expanded, showing 'TLS (Standard-Port 465)', 'STARTTLS (Standard-Port 587)', and 'STARTTLS (if possible)'. A 'Test connection' button is now visible next to the 'Standard SMTP account' checkbox. The 'Ok' and 'Cancel' buttons are at the bottom.

Postal Codes / ZIPs

Working with ZIPs has been designed completely new.

Installing Codes Manually

Sometimes it might become necessary to install the postal codes manually. Proceed as follows:

- You will receive a ZIP file with the new postal codes from cobra; copy it to the cobra system directory into the \ZipFiles directory.

Should you not be sure where the system directory is located, you can look it up in cobra.

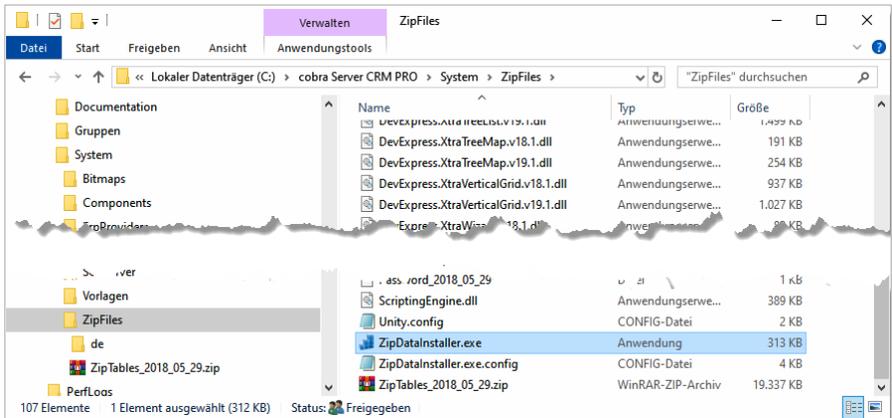
- In the »Info« tab click the »Product information« button.
- Select »System info«.

You will now see the different paths where the cobra components have been placed.

In this directory you can now see, besides the ZIP file containing the postal codes, a file called »ZipDataInstaller.exe«.

This file will install the new postal codes.

- Double-click the file.



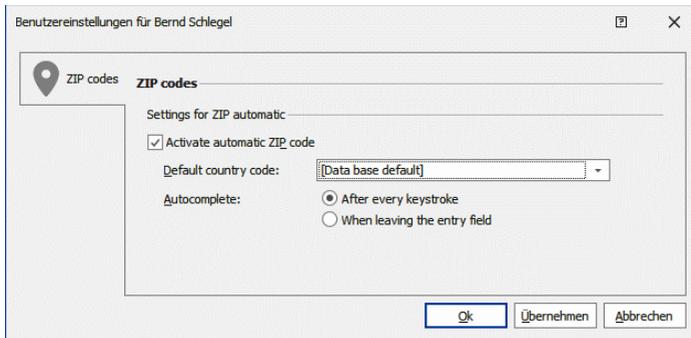
The postal code wizard will open.

- Click the »Install« button.

The process is now completed and the current postal codes will have been installed.

Presettings: User

Issue the command »File: User-specific settings: ZIP Codes«.



Automatic postalcode system active

This automatic system will search for a unique assignment between street, postal code and city. If, e.g. you enter the value 78479 into the field »Postal code«, automatically »Reichenau« will be entered as »City«. And, vice versa, you can also enter a city or a street and, if your entry is unambiguous, the other data will be complemented automatically by the system. In the example shown only »Wallgut« was entered by the user, the other data were added automatically from the postal code data.

Street	Wallgutstraße
Country/ZIP	D 78462
City	Konstanz
Country	DEUTSCHLAND

Default country code

This code will show which country will be offered by default when a new address is created. In each case, users can specify a different country. This parameter will also determine which postal codes the system will suggest if the data are not ambiguous.

Auto-completing

Specify when a matching entry in the postal code list is to be searched while creating an entry: After each character entered or only when leaving the entry field.

Presettings: Database

This settings are valid for the database just opened. Users can modify some of these settings for their own tasks.

- Issue the command »File: Database: Configure ZIP codes«.

Configure and administer ZIP codes

Configure data base settings of ZIP codes

Default country code:

Default values from data base structure, data record templates and user settings regarding country codes have precedence.

ISO standard for country code (country):

Fill in country code (country) automatically when a data record is created
 The default directory of the user, alternatively that of the database, will be considered. Default values from the database structure or data record templates will win.

Fill in state automatically - in capitals - when the country code is selected and modified
 Language:

Check address data for plausibility
 A country field per address group (ZIP code selection list) is required for a plausibility check. If necessary, implicitly there will be no check done.

Check for correct length of ZIP code only

System settings

ZIP code data:

Data inventory:

Settings of the ZIP codes

ZIP codes:

Please select which field contents are to be included for the ZIP code automatic function in the entry masks. They can be selected individually for each country and will affect delimitation of the selection lists contents and the automatic function for unambiguous matches.

Field settings

Field type	Include contents for automatic function
Postleitzahl	<input checked="" type="checkbox"/>
Ort	<input checked="" type="checkbox"/>
Straße	<input checked="" type="checkbox"/>
Hausnummer	<input checked="" type="checkbox"/>
Ortsausatz	<input type="checkbox"/>
Ortsteil	<input checked="" type="checkbox"/>
Landkreis	<input type="checkbox"/>
Regierungsbezirk	<input type="checkbox"/>
Bundesland	<input type="checkbox"/>
Ländercode (Land)	<input checked="" type="checkbox"/>
Postfach-PLZ	<input checked="" type="checkbox"/>
Postfach-Ort	<input checked="" type="checkbox"/>
Postfach-Nummer	<input checked="" type="checkbox"/>

Default country code

The postal codes of the German-speaking countries Germany, Austria and Switzerland have been included in the software as default. If users then create an address, the country selected here will be suggested to them and the relevant postal code database will be loaded. If a different value was entered in the database structure, any templates or the user settings, then that will be suggested.

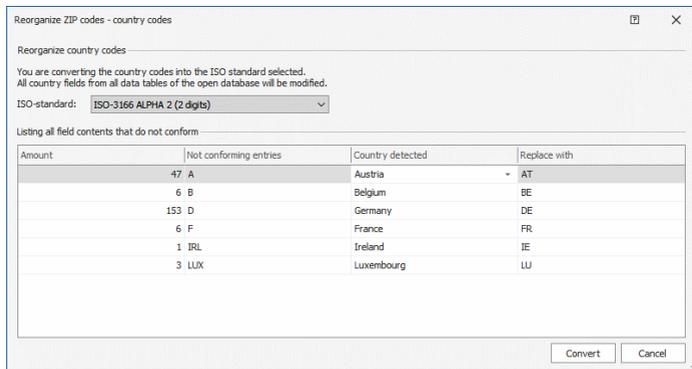
ISO-Standard for country codes

There are several standards for representing country codes. Select here the code to be used for the current database. e.g. Germany could be coded as »D« (German automobile code), »DE« (ISO-3166 ALPHA 2) or as »DEU« (ISO-3166 ALPHA 3).

Reorganizing country codes

If you alter the country code setting, you must reorganize the codes. All codes already specified in the database will be replaced by the currently selected codes and all existing data records will be modified.

- Click the »Reorganize country codes« an. button.



In this dialog you can see which country codes are replaced by which other country codes.

- Click »Convert« to replace the country codes.

Country code when creating a new data record

If you activate this option, the country code set before will be entered in the corresponding field when the data record is created; however, you can alter it here..

State when selecting and altering

If you activate this option, the state allocated to the code selected will also be entered (in capital letters) when creating a data record. You can specify in which language the name of the state is to appear.

Checking address data for plausibility

If this option has been activated, the address data entered will be compared to the entries in the postal code database when the record is saved. If they do not match the entries in the database, there will be an error message.

Checking only the correct length of the postal code

If this option has been activated, only the length of the postal code will be checked, not the complete address data (in Germany it has five digits, in Switzerland four etc.).

Install postal code data

Sometimes a cobra update you receive from us will include updated postal codes. So after an update, click this button to update your data.

Configure and administer ZIP codes

Configure data base settings of ZIP codes

Default country code: Germany (D)

Default values from data base structure, data record templates and user settings regarding country codes have precedence.

ISO-standard for country code (country):
Vehicle country codes Reorganize country codes...

Fill in country code (country) automatically when a data record is created
The default directory of the user, alternatively that of the database, will be considered. Default values from the database structure or data record templates will win.

Fill in state automatically - in capitals - when the country code is selected and modified
 Language: English

Check address data for plausibility
A country field per address group (ZIP code selection list) is required for a plausibility check. If necessary, implicitly there will be no check done.

Check for correct length of ZIP code only

System settings

ZIP code data: Installed Install data...

Data inventory: 3/11/2020

Settings of the ZIP codes

ZIP codes: Germany (D) Reset to default

Please select which field contents are to be included for the ZIP code automatic function in the entry masks. They can be selected individually for each country and will affect delimitation of the selection lists contents and the automatic function for unambiguous matches.

Field settings

Field type	Include contents for automatic function
Postleitzahl	<input checked="" type="checkbox"/>
Ort	<input checked="" type="checkbox"/>
Straße	<input checked="" type="checkbox"/>
Hausnummer	<input checked="" type="checkbox"/>
Ortsausatz	<input type="checkbox"/>
Ortsitel	<input checked="" type="checkbox"/>
Landkreis	<input type="checkbox"/>
Regierungsbezirk	<input type="checkbox"/>
Bundesland	<input type="checkbox"/>
Ländercode (Land)	<input checked="" type="checkbox"/>
Postfach-PLZ	<input checked="" type="checkbox"/>
Postfach-Ort	<input checked="" type="checkbox"/>
Postfach-Nummer	<input checked="" type="checkbox"/>

Postal code list settings

Here you specify which fields from the database are to be used for the different postal code lists (postal code automatic function).

At »Postal code list« select for which country you want to specify the settings. You must enter the settings for all countries separately. So first select at »Postal code list« at the top for which country the following settings are to be valid.

If the automatic function is active, the field contents marked in these presettings will be used for the postal code automatic function. If an unambiguous data record matching the entries up to now is found, the automatic function will become effective. If, e.g. the user enters a unique street name or an unambiguous postal code, the other fields marked here will automatically be filled with the data from the postal code database.

Entering Addresses using the Postal Code Automatic Function



The following feature will *only* work if the postal code automatic function has been activated as described in the user settings:

In postal code fields you can always start and end the postal code automatic function using the Ctrl+Shift+P shortcut. Thus you can make a »False« entry without the postal code automatic function correcting your entry.

The postal code automatic function will mainly assist you in creating primary addresses, since in secondary addresses usually the address data of the primary address are taken over.

In the entry marks those fields for which the automatic function has been activated will be marked in soft colors as soon as they are clicked. These fields can be filled automatically with data from the postal code database. In the following figure they have been marked by a frame.

Add data record (Addresses)

Company

Company

Company 1

Street

Country/ZIP DE

City

Country DEUTSCHLAND

POB delivery

Phone

Depending on the entry mask and the database different fields could also have been selected.

There are several ways to use the postal code automatic function.

The principle is always the same: If you enter data in one or more of the fields, only such details will be offered in the other fields for selection that match the entry.



This button will open the selection assigned to this field in the postal code database.



This button will open the dialog with details from the postal code database.

Entry Mask for Searching Addresses

if you enter data in a field, in the other fields only such details will be offered that match it.

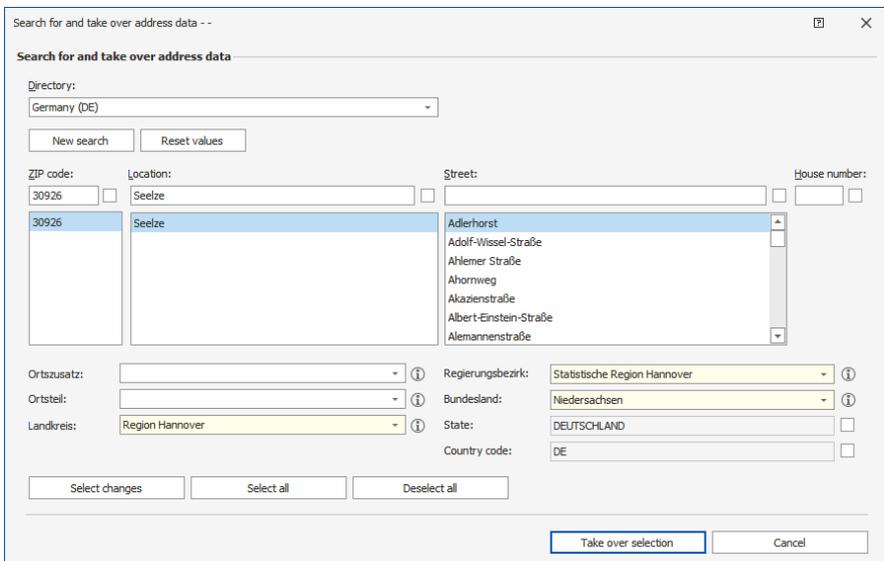
So if you enter the sequence of numbers »30926« in the field »ZIP«, automatically the details matching this city will be entered or offered for selecting provided they can be assigned to this field unambiguously.

if there they can be assign without doubt, the other matching details will be entered automatically in the fields.

Dialog

The same procedure applies to working with the dialog.

If you have already entered some data in the address mask and open the dialog using the  button, they will already have been entered there.



Search for and take over address data - -

Search for and take over address data

Directory: Germany (DE)

New search Reset values

ZIP code: 30926 Location: Seelze Street: House number:

30926 Seelze

Adlerhorst
Adolf-Wissel-Straße
Ahlemer Straße
Ahornweg
Akazienstraße
Albert-Einstein-Straße
Alemannenstraße

Ortssatz: Regierungsbezirk: Statistische Region Hannover

Ortsteil: Bundesland: Niedersachsen

Landkreis: Region Hannover State: DEUTSCHLAND

Country code: DE

Select changes Select all Deselect all

Take over selection Cancel

If there are no details yet in the address mask, this dialog will be empty when opened.

Search for and take over address data - -

Search for and take over address data

Directory: Germany (DE)

New search Reset values

ZIP code: Location: Street: House number:

1. Ausfallstraße
1. Eierhorstweg
1. Kanal
1. Koppelweg
1. Landwehr
1. Moorweg
1. Moorwiese

Ortszusatz: Regierungsbezirk:
Ortsteil: Bundesland:
Landkreis: State: DEUTSCHLAND
Country code: DE

Select changes Select all Deselect all

Take over selection Cancel

- First, at »List« alter the country, if necessary.

If you enter a known detail in a field here, in the other fields only such details will be offered that match those entered already.

- In both cases you will be complementing the database data by matching details.

If, e.g. you enter an unambiguous city name, the ZIP, federal state etc. will be shown automatically.

The screenshot shows a dialog box titled "Search for and take over address data". It contains several input fields and a list of search results. The "Directory" is set to "Germany (DE)". The search results show "78465" for the ZIP code, "Konstanz" for the location, "Albert-Riesterer-Weg" for the street, and "7" for the house number. Below these fields are dropdown menus for "Ortssatz", "Regierungsbezirk", "Ortsteil", "Bundesland", "Landkreis", "State", and "Country code". The "Country code" is set to "DE". At the bottom, there are buttons for "Select changes", "Select all", "Deselect all", "Take over selection", and "Cancel".

- Any data new for the address will be marked by color. They will also be selected automatically for storing in the address data record. Such data will be taken over into the address data record when closing the dialog.

ZIP code:	Location:
78465	Konstanz
78465	Konstanz

- You can manually select or deselect individual details. To do so, click them.
- Use the »Select modifications« button to select field contents complemented by data from the ZIP database to be taken over into the address data record.
- Use the »Select all« button to select all field contents shown to be taken over into the address data record.

- Use the »Deselect all« button to deselect all field contents shown so that they will not be taken over into the address data record.
- Use the »New search« button to delete all entries already selected in the dialog and proceed with entirely new entries, regardless of the entries made in the address mask.
- Use the »Reset values« button to again take over all entries already made in the address mask.

Close the dialog after you have selected the data you want.

- Use the »Take over selected values« button to enter the data into the address data record as you see them in the dialog.
- Use the »Cancel« button to discard any modifications you made in the dialog and return to the previous state.

The entries will be taken over into the address data record.



Only those details will be taken over into the data record there is a field for in the database *and* that have been integrated in the entry mask or the view. Any field contents whose fields have not been integrated into the entry mask or view from which you have called the dialog will *not* be saved! Such fields are only intended to make it easier for you to search in this dialog.

You can identify such fields by a specific label .

This means that this field

- does either not exist in the database,
- or was not integrated into the view or entry mask.

You can see which of these options is true by hovering briefly over the  icon. So if you want to save the details, you must have a suitable field created in the database or enter such a field in the view or entry mask.

Table Layouts

Creating a Layout

The look-and-feel of tables is defined in table layouts. There you specify, e.g. whether the quick search is shown in the table, whether, and if so, according to which field the display is grouped and which columns will be displayed. You can specify such layouts for all types of tables, not only for the address table.

- To create a table layout click that table.
- Go to the »Layout« tab.

The screenshot shows the 'Layout' tab in the software interface. The ribbon contains the following options:

- Search: Show/hide quick search, Edit filter
- Columns: Column selection, Optimal width (all columns)
- Grouping: Show/hide group field, Expand all groups, Reduce all groups, Reset grouping
- Layouts: Layout list, New layout, Save current layout, Default layout, Managing the layout

The navigation bar includes the following tabs:

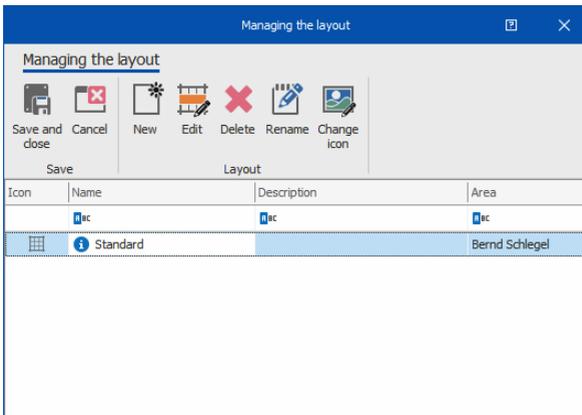
- ADDRESSES (selected)
- SERVICE
- SUPPORT
- SALES PROJECTS
- EVENTS
- ACTIVITIES
- ARTICLES
- REPORTS

The main area displays the 'Address list' table with the following columns:

Customer...	Company	Name	First n...	Street	ZIP	City	Phone direct
=	1st Motor Rental and Sale			175A Edgware Rd	E11 ...	LONDON	+44 (0) 20 7706 8093...
	1st Motor Rental and S...	Davis	Ella Flor...	175A Edgware Rd	E11 ...	LONDON	+44 (0) 20 7706 8093...
	1st Motor Rental and S...	Foster	Margret	175A Edgware Rd	E11 ...	LONDON	+44 (0) 20 7706 8093...
	A2B Room Concepts			38 Lever Street	M90	MANCHESTER	
	A2B Room Concepts	Parker	Matthew	38 Lever Street	M90	MANCHESTER	+44 (0) 161 4142 867...
	A2B Room Concepts	Whitfield	Moham...	38 Lever Street	M90	MANCHESTER	+44 (0) 161 4142 867...
	Abacus Gourmet Food			23 Cauliflower Lane	BA1...	TROWBRIDGE	
	Abacus Gourmet Food	Barton	Bela	23 Cauliflower Lane	BA1...	TROWBRIDGE	+44 (0) 1225 72283-10
	Abacus Gourmet Food	King	Peter	23 Cauliflower Lane	BA1...	TROWBRIDGE	+44 (0) 1225 72283-12
	Abacus Gourmet Food	Roberts	John	23 Cauliflower Lane	BA1...	TROWBRIDGE	+44 (0) 1225 72283-25
	Abat Service Group			7 Coney St	YO1...	YORK	
	Abat Service Group	Bruce	Brittney	7 Coney St	YO1...	YORK	+44 (0) 1904 866391...

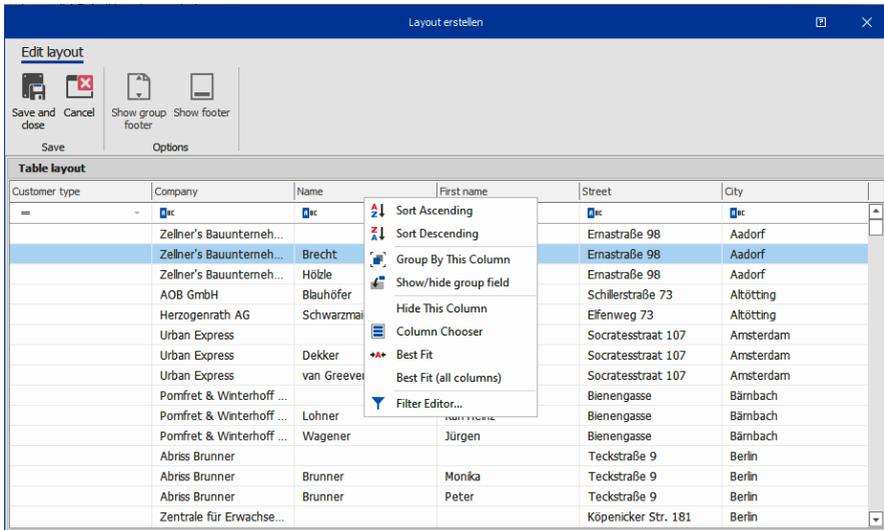
You now have two options to modify the existing layout:

You modify the look of the table in the table itself. This can be done with the menu bar commands as well as with right-clicking or the column headers. In this case, design the table as you want and then click the »Save current layout« button. In the following dialog you can then enter a name for the layout.



You can also design a completely new layout in an editor of its own.

- Click the »New layout« button.
- You will see the table in an editor.
- Right-click a column header.
- You will find the commands available in the context menu.

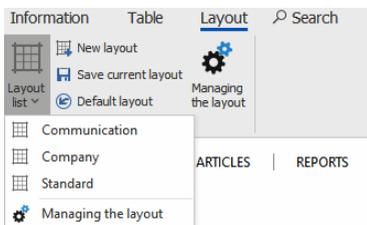


- Arrange the layout as required.
- Click the »Save and close« button to close the editor.
- Enter a name for the layout.

Switching Layouts

You can switch between different layouts.

- Click the »Layout list« button.

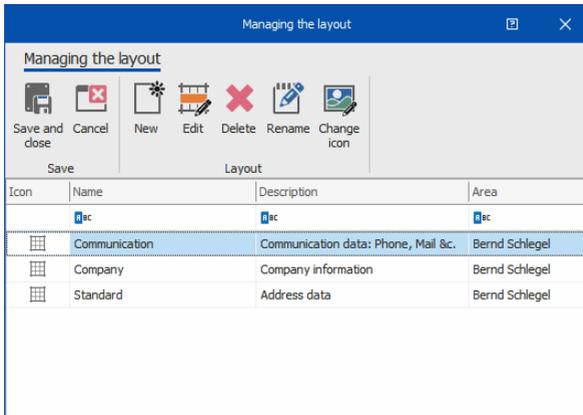


- Select the layout you want.

Edit and Delete Layouts

You can modify name, description and icon of a layout as well as its properties.

- Click the »Layout administration« button.



You can access the options you need via the button.

- If you click the »Edit« button, it will be opened in that editor.
- You can use any of the popular graphics formats for icons.
- Should you delete a layout by mistake, you can just close the dialog and not save the modifications. The layout will then remain unchanged.
- We will provide a default layout. It will not be visible in the layout administration view and you cannot modify nor delete it.

Duplicates

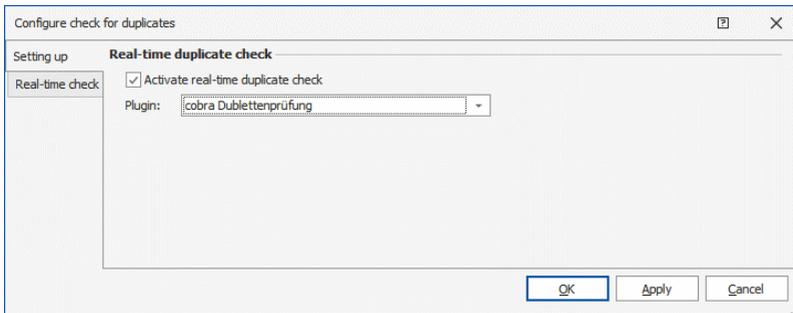
Configuring

You can put together criteria to check for duplicates in a very granular way to specify precisely when a data record is to be suspected of being a duplicate of another data record. Thus you can prevent formation of duplicate data records.



There is also a separate add-on module for cobra that checks existing data pools for duplicates and assists with cleaning them up. This section is *not* about that add-on. In fact, this is about checking for duplicates while creating addresses.

- Issue the command »File: Database: Configure duplicate check«.
- Go to the »Configuration« tab.



Real-time duplicate check

Use this option to turn duplicate checking on and off. If this option was not activated, there will be no duplicate check while entering data.

Should you be using the real-time check, you will detail this check in a different tab.

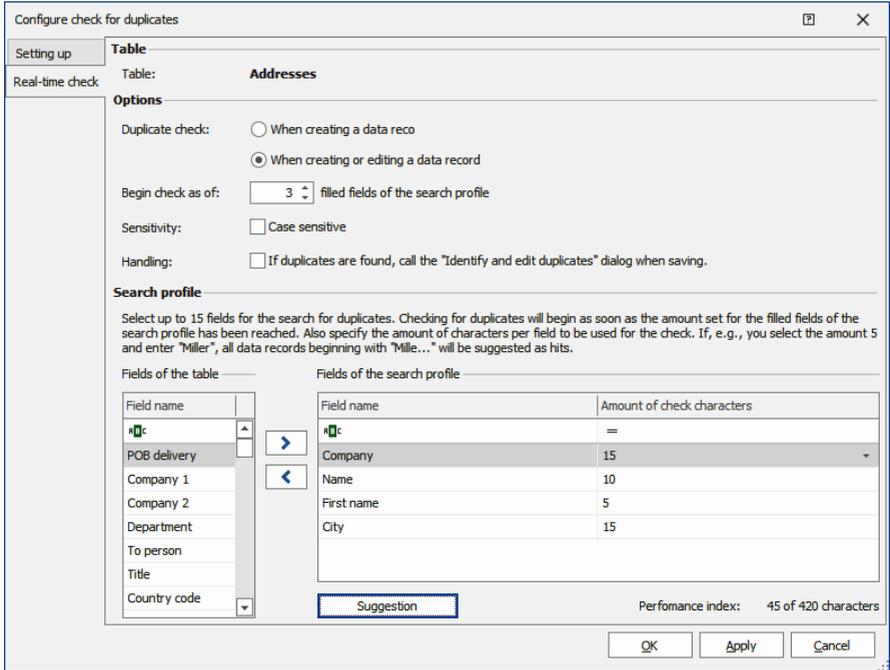
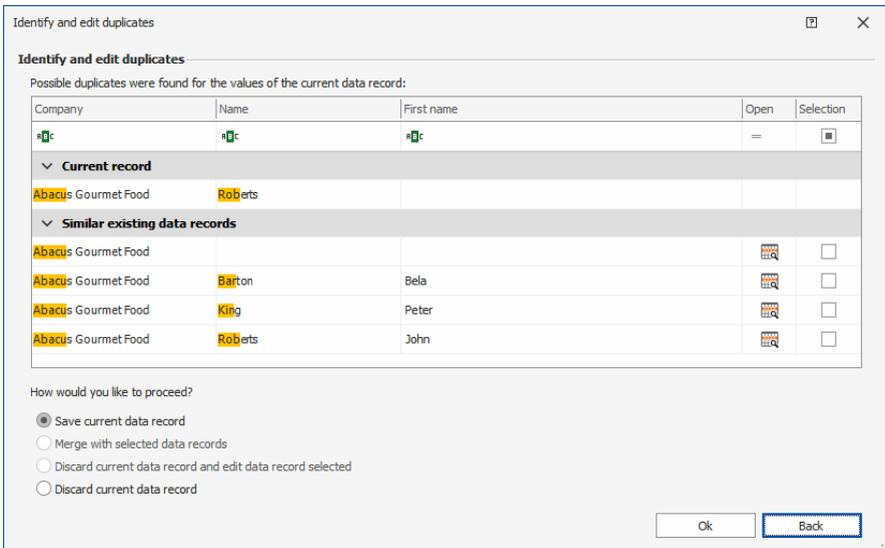


Table Right now, duplicate checking is only available for address data.

Duplicate check Specify when a check is to be done. You can only have data checked while they are being entered the first time or, in addition, when they are being modified.

Begin checking Specify how many fields of the search profile must have been filled in for the check to begin. In this dialog, you compile the actual search profile from the fields of the data table.

- Sensitivity** Specify also whether the duplicate check is to be case sensitive. Using it, it could be that »Cobra« might not be identified as a duplicate of »cobra«.
- Handling** Specify whether you want a dialog called on suspicion of a duplicate. In this dialog you will see an overview of the existing data and can decide how to proceed with them.



You will find details about this dialog in the following section.

- Fields** Specify here the contents of which fields are to be used to find duplicates. The fields of the data table will be available. You can have a maximum of 15 fields checked. The fields to be checked will be compiled in a »Search profile«.
- When you click a field of the selection »Fields of the table«, it will be added to the »Fields of the search profile« and thus be considered in future whenever there is a real-time check.

If you add a yes/no-field or a field with a selection list to the search profile, you do not have to configure it.

To remove a field from the search profile double-click it.

Search profile

Select up to 15 fields for the search for duplicates. Checking for duplicates will begin as soon as the amount set for the filled fields of the search profile has been reached. Also specify the amount of characters per field to be used for the check. If, e.g., you select the amount 5 and enter "Miller", all data records beginning with "Mille..." will be suggested as hits.

Fields of the table

Field name
POB delivery
Company 1
Company 2
Department
To person
Title
Country code

Fields of the search profile

Field name	Amount of check characters
POB delivery	=
Company	5
Name	3
First name	3

Suggestion

Performance index: 11 of 360 characters

The amount of check characters may at the most be as many as the maximum length of that field. If the amount of check characters is less, the system will identify quite a number of suspicious addresses, if it is more, it will identify less.

If you enter a name such as »Beckenbauer«, three check characters will lead to all names beginning with »Bec« being identified as possible duplicates, i.e., »Becker«, »Beck« etc. also, with six check characters only such names as »Becker« where six initial characters match the entry.

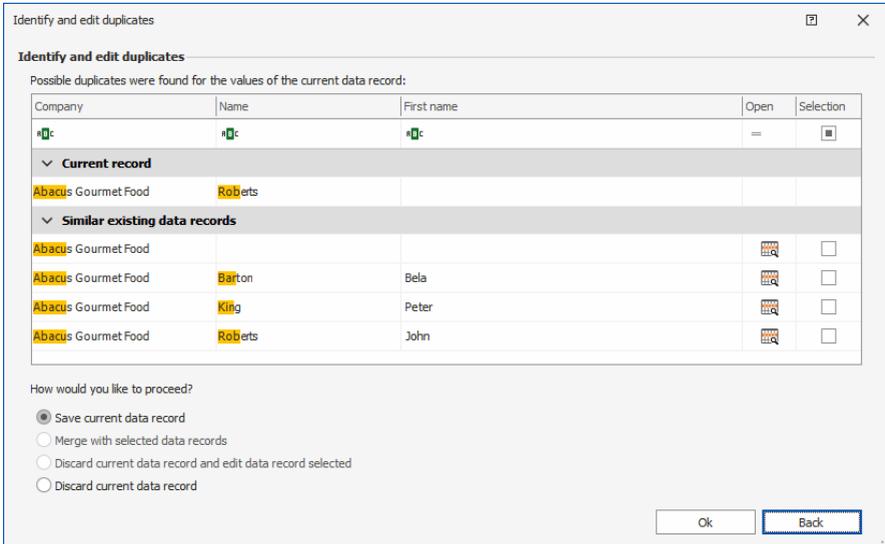
The system will begin to automatically search for duplicates as soon as the amount of fields specified for starting to check has been arrived at and in the field to be checked the amount of check characters specified for checking has been arrived at.

Working with the Duplicate Check

While you are working with cobra, checking for duplicates is running in the background. If, on the basis of the search profile, one or more addresses suspected of being duplicates are identified, there will be a message at the lower right of the cobra screen.



- If you click the text of this message, the dialog for managing duplicates will open.
- This dialog will also open when you are saving the data entered that are suspected of being duplicates.



In this dialog you can see which contents of which of the fields specified in the search profile are suspected of being duplicates.

The data you have just entered will be displayed as »Current data record«.

Data records already existing in the database will be displayed as »Matching existing data records«.

- To open the data record you require click the  button in the dialog for creating a data record where you can view, but not edit it.

At »How would you like to proceed?« you have the following options for editing duplicates:

How would you like to proceed?

Save current data record

Merge with selected data records

Discard current data record and edit data record selected

Discard current data record

- You can save the current data record. In this case it will be added as a duplicate to existing data records; these will not be modified.
- You can merge the current data record as well as one or more of existing data records selected, i.e. merge them in one address only. Mark that data record with which the current data record is to be merged.

Identify and edit duplicates

Identify and edit duplicates

Possible duplicates were found for the values of the current data record:

Company	Name	First name	Open	Selection	
			=		
Current record					
Abacus	Gourmet Food				
Similar existing data records					
Abacus	Gourmet Food			<input checked="" type="checkbox"/>	
Abacus	Gourmet Food	Barton	Bela		<input type="checkbox"/>
Abacus	Gourmet Food	King	Peter		<input type="checkbox"/>
Abacus	Gourmet Food	Roberts	John		<input type="checkbox"/>

How would you like to proceed?

Save current data record

Merge with selected data records

Discard current data record and edit data record selected

Discard current data record

Ok Back

- You can select one of the already existing data records. Use the option »Discard current data record and retain data record selected« to delete the data just created. The data record marked will be opened for editing. Any other already existing duplicates will also be retained unmodified.
- You can the discard the current data record. In that case, the data just created will be deleted and everything remains just as it is.

Sub-records when Duplicating

If you duplicate an address, there is the question of what to do with the additional sub-records belonging to this address.

Record duplicate

Abacus Gourmet Food, , 23 Cauliflower Lane, GB-BA14 8AQ TROWBRIDGE

Keywords (8)

Contacts (21)

Linked Additional-, Subtable- and other records (5)

All protocols relating to personal data (1 entries)

What kind of address would you like to create?

As single address

As sub address of the selected address hierarchy
Abacus Gourmet Food, , 23 Cauliflower Lane, GB-BA14 8AQ TROWBRIDGE

Would you like to duplicate the current record, including the selected subdata ?

Yes No

You can select which sub-records, such as contacts, are to be added to the new data record. You can add none, selected only or all additional data.

You also need to decide whether a new single address or a hierarchy consisting of a primary as well as a secondary address with a contact person is to be created when duplicating.

Keywords

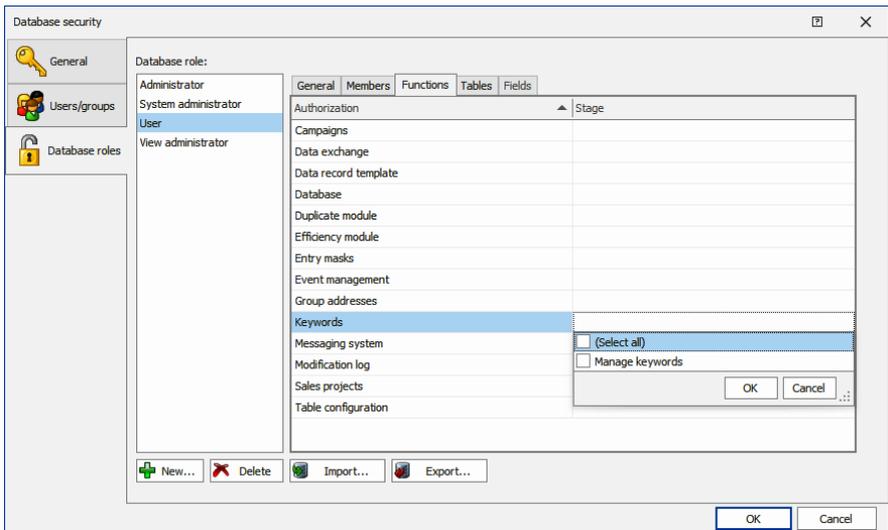
General

It is the aim of this system to prevent proliferation of keywords as it typically results from several users of a database assigning keywords to data records at whim for years and years. The cobra keyword system will enable a well-structured, centrally managed keyword assignment making it possible to filter specific groups of data with great accuracy even in large data pools.

Rights

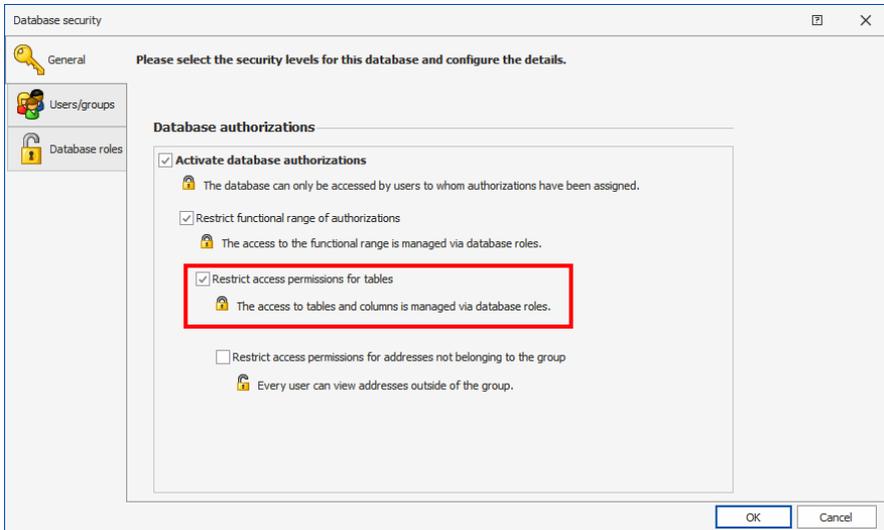
A new right has been created on database level to manage keywords. on database level It will be effective as soon as database authorizations have been activated and permissions have been restricted to the range of functions.

- Issue the command »File: Database: Database security«.

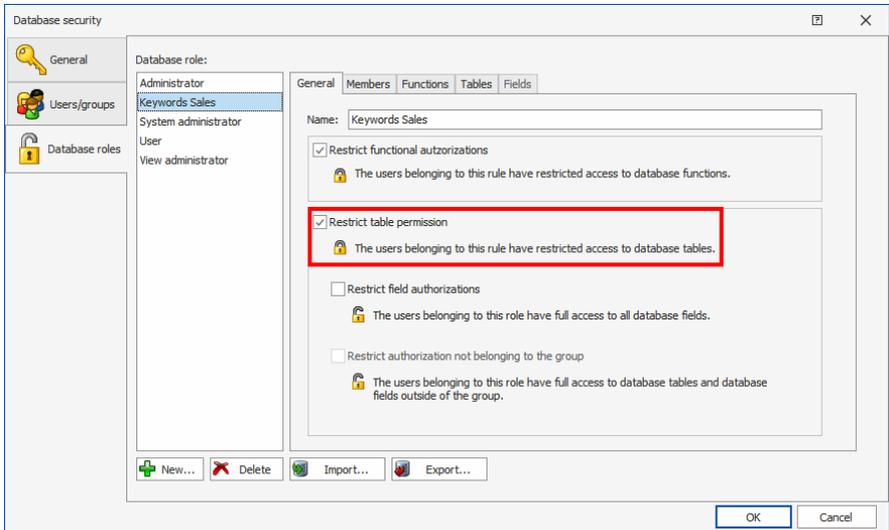


Using database authorizations, you can also ensure that specific user (groups) will only see specific keywords at all.

- Issue the command »File: Database: Database security«.
- Restrict permissions for tables.

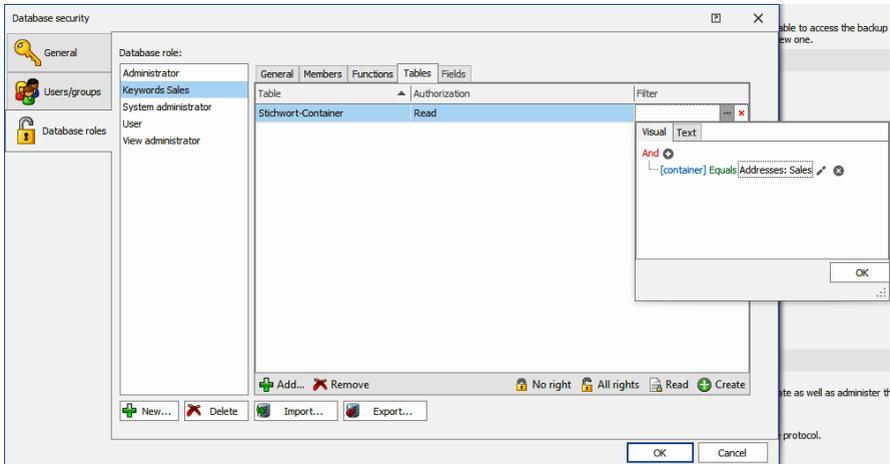


- Now create a special role. You will later assign it to all users who are to be able to see a specific keyword container.
- Restrict table authorizations for this role.



- Go to the »Tables« tab. There define a filter permitting access to one or more of the relevant keyword containers.
- Assign the right »Read«.
- In addition, you can define a role for keyword managers and also assign them the right to create and erase keywords.
- You might also want to create an additional database role »General« or the like, containing keywords that are to be accessible to all users. You can then assign this role to all users.

New Features for Your Daily Tasks



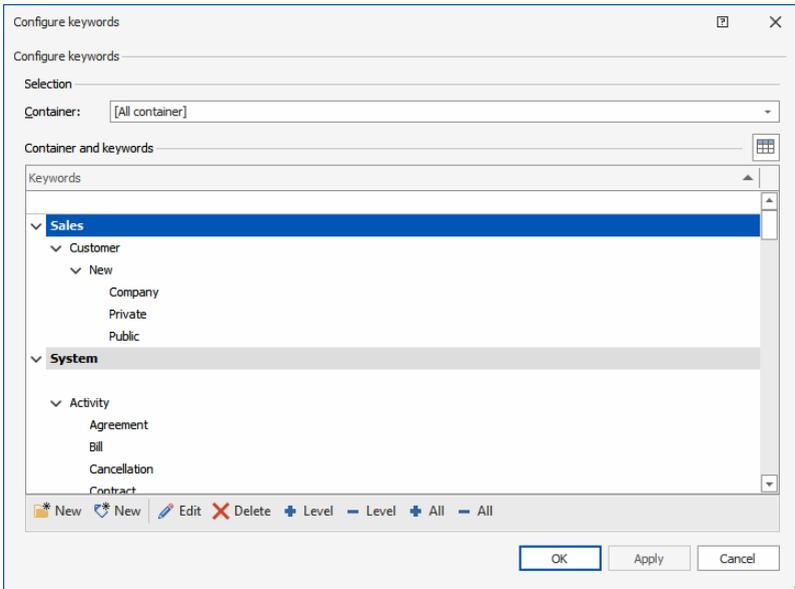
Users will then see only such keywords they have been assigned access rights here.

Some general explanations about important elements of the keyword system.

Container

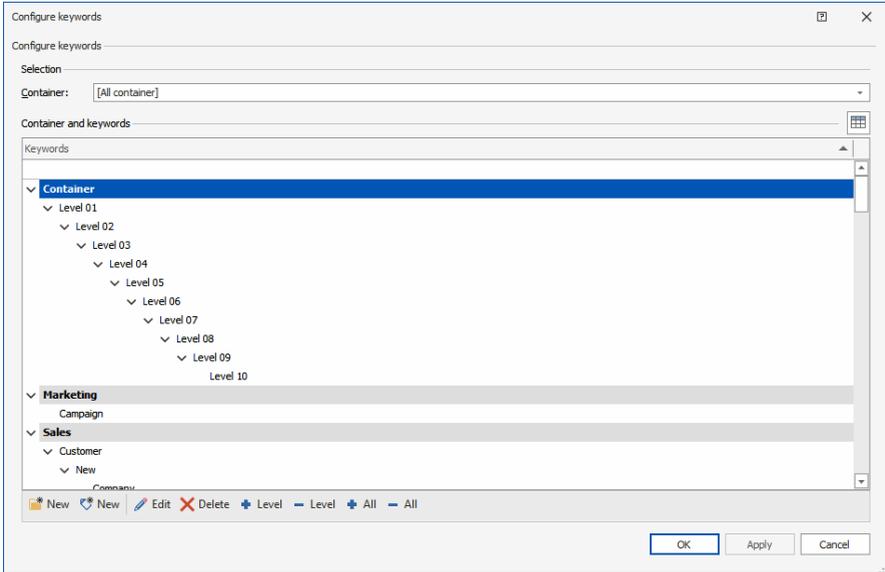
- Issue the command »File: Database: Configure keywords«.

Keywords are stored in so-called containers. Containers are only repositories intended to keeping keywords organized, they are not used as keywords themselves.



Hierarchy

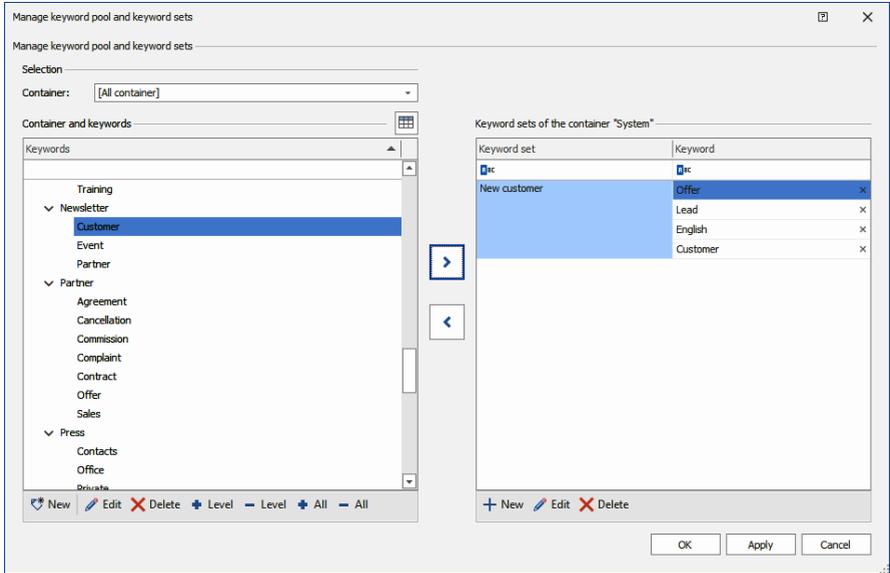
Keywords can be arranged in up to ten levels of hierarchy. They will take this form:



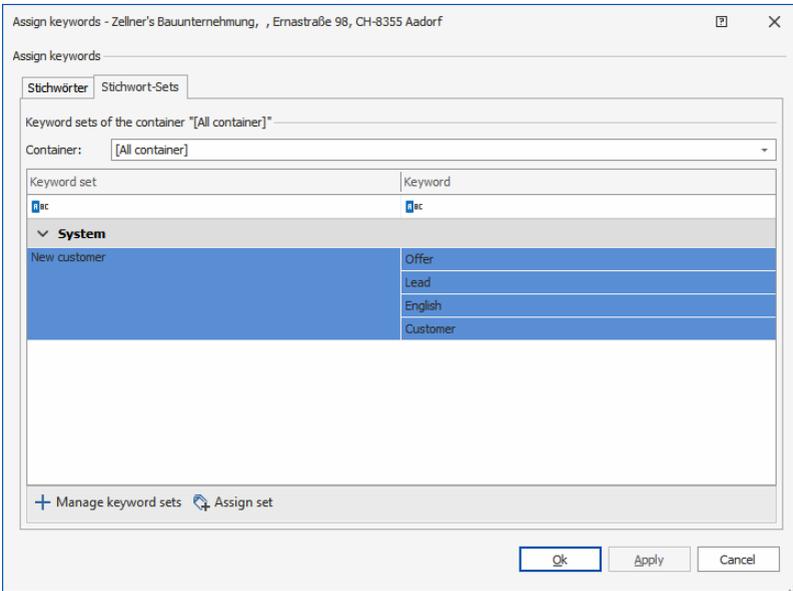
Sets of Keywords

Several keywords are pooled in a keyword set. So if you want to assign new customers some keywords, you do not need to assign these keywords individually, but can summarize them in a set »New customer«. In a keyword set there can only be keywords coming from the same container.

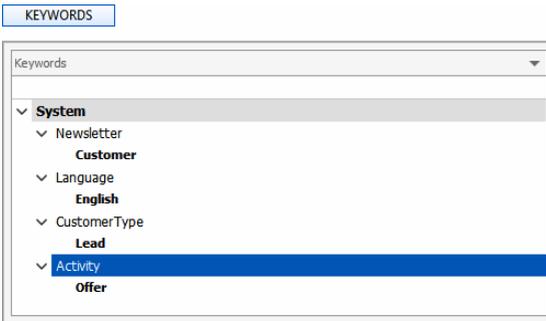
- You edit keyword sets from a keyword list. Right click and select »keyword pool«.



- In a keyword list you can select »Apply« from the context menu.
- Select the tab »Keyword sets« and issue the command »Assign set«.



The keywords will then appear as individual keywords in the address data record.



Configuring

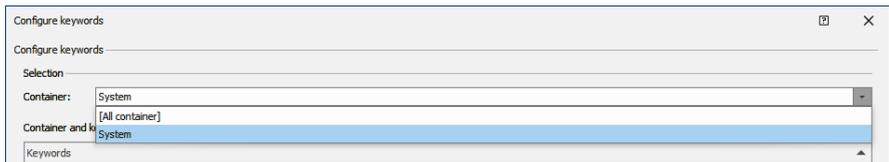
There is a new command in the database settings to expand the keyword pool. Here you can centrally create keywords for the database you have opened.

- Issue the command »File: Database: Configuring keywords«.

Creating Containers

When you open a new database, at the beginning it will contain only a container »System«, but now keywords or hierarchies.

- Issue the command »File: Database: Configuring keywords«.



You can add keywords to the existing container »System« and also create containers of your own. By assigning access rights to specific containers you can assign users or user groups precisely those keywords intended for them. After all, keywords are assigned separately for each database.



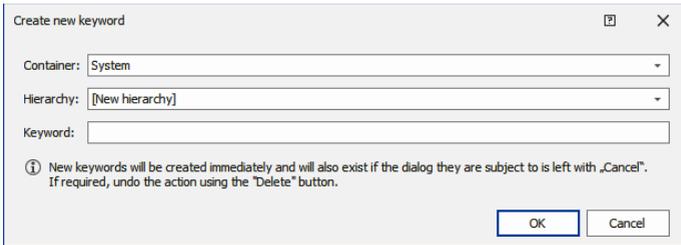
You can neither rename nor erase the container »System«.

Creating the First Keywords

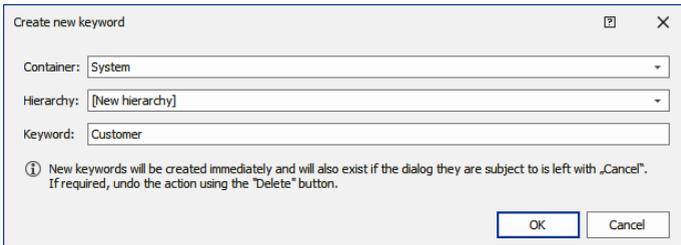
As a rule, keywords are stored in containers.

- Mark that container in which the new keyword is to be stored.
- Click the »New keywords« button.

- Should there be any previous modifications to the keyword system that have not been saved, you will be asked whether you want to save them now.

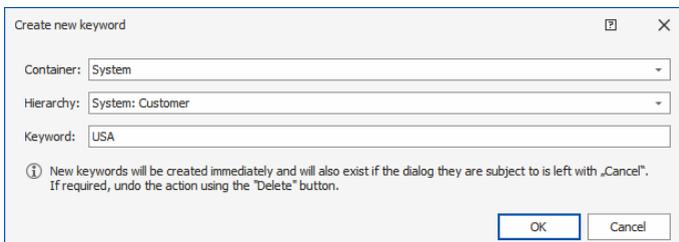


- Enter the keyword and confirm with »OK«.

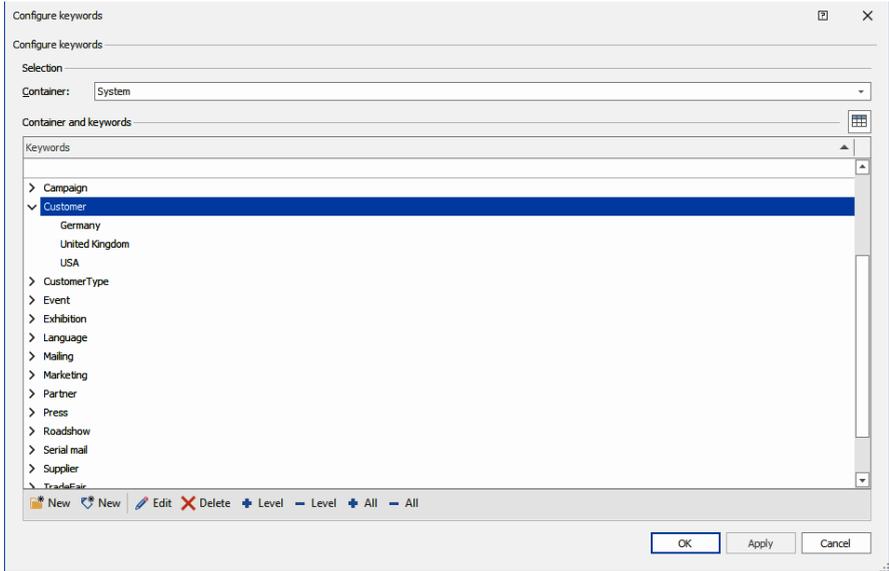


A keyword »Customer« is created in the »System« container. This keyword might contain further sub-keywords, i.e. become the starting point of a hierarchy.

- To create sub-keywords, mark the keyword.
- Click the »New keywords« button.
- Enter the new keyword and confirm by clicking »OK«.



You have now created the first sub-keyword. Together with other keywords a hierarchy will form which in turn can be the starting point for other subordinate hierarchies.



Deleting Keywords

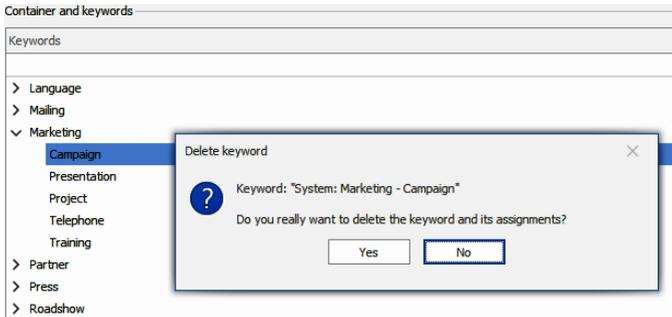
There are several types of keywords:

1. Those standing alone,
2. those standing on the lowest level of a hierarchy, and
3. those having subordinate keywords of their own.

1. Keywords Standing Alone:

- Click the keyword required.
- Click the »Delete« button.

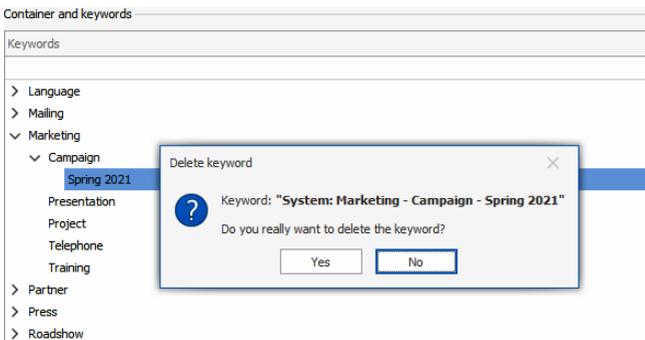
You will be asked whether you really want to delete this keyword.



2. Keywords on the Lowest Level of a Hierarchy:

- Mark the keyword required.
- Click the »Delete« button.

You will be asked whether you really want to delete this keyword.

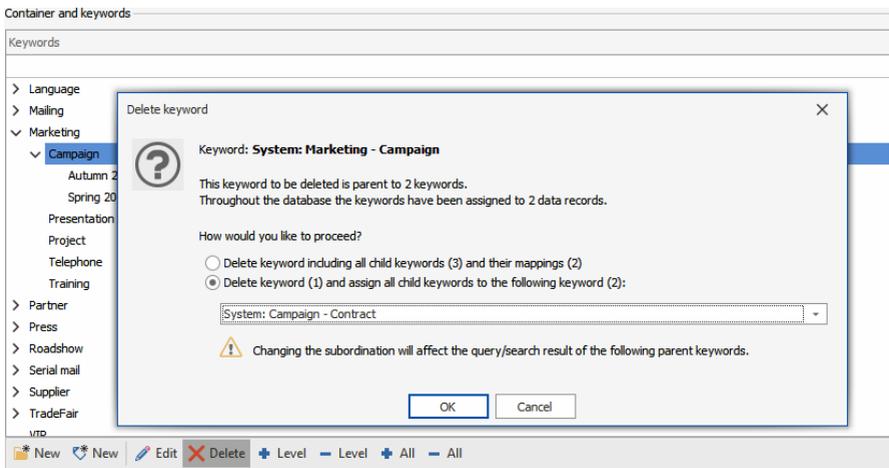


- Confirm by clicking »Yes«.

3. Keywords with Sub-Keywords

You can either delete a keyword complete with its sub-keywords or assign the subordinated keywords to another keyword. This can only be done within the current container, it is not possible to move keywords among several containers.

- Mark the keyword required.
- Click the »Delete« button.

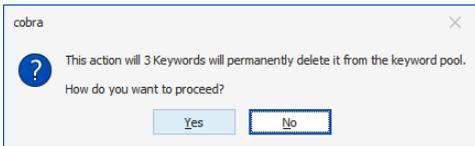


This is what will happen in the example shown:

- The keyword »Campaign« will be deleted in the »Marketing« container.
- Any keywords subordinated to the »Campaign« keyword (as well as their hierarchies, if any) will be taken over within the container to another selected keyword.

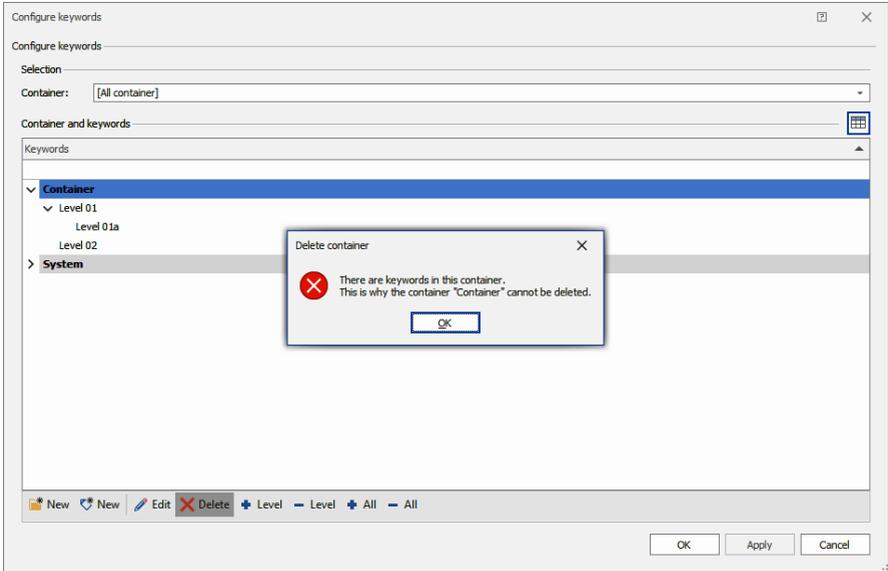
After Deleting Keywords

- After deleting a keyword you can click the »Apply« button.
- Otherwise you will be asked, before the next action, whether you want to save the changes.
- And if you leave the dialog by clicking »OK«, you will also be asked whether you want to save the changes.



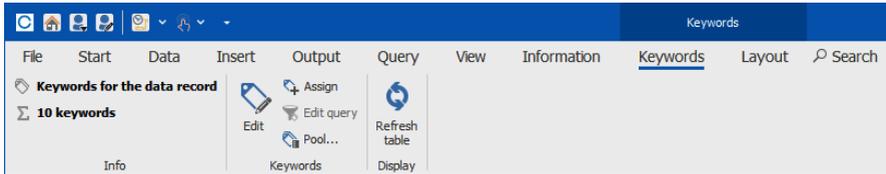
Deleting a Container

Containers can only be deleted if they do not contain any more keywords. So, if required, delete all keywords from a container before you attempt to delete that container. Otherwise there will be an error message.



The Menu Bar

If you work with keywords, there will be a special tab in the menu bar.



- | | |
|---------------|---|
| Info | Here you can see how many keywords have been assigned to the current data record. Only the number of keywords you are allowed to see will be shown. |
| Edit | Open the »Editing keywords« dialog where you can delete or create keywords. |
| Assign | Open the »Assign keywords« dialog where you can assign keywords and keyword sets to the current data record. |
| Edit Query | If you have queried addresses, you can use this dialog to assign keywords to these addresses. Only those keywords will be shown that all addresses share. |
| Pool | Open the dialog where keywords and keyword sets are administrated. |
| Refresh Table | You are reloading the data from the server. |

Assigning Keywords

If you work with hierarchies of keywords, you can assign keywords *directly* and *indirectly*.

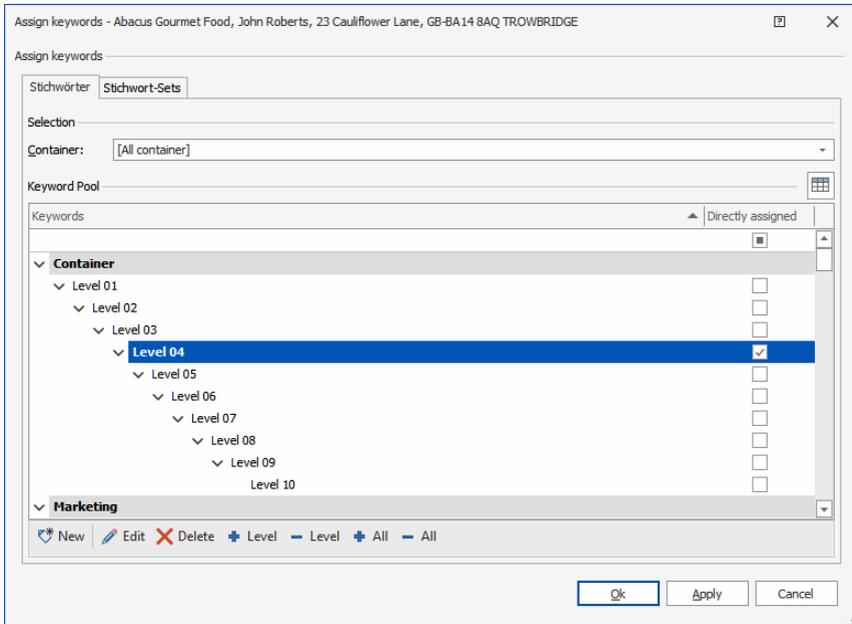


- If you assign a keyword on e.g. the fourth hierarchy level to an address, this keyword will have been assigned to the address *directly*.
- Assigning a keyword of the fourth hierarchy level means that also the higher level keywords of the first, second and third hierarchy level are automatically assigned to the address. These keywords have therefore been assigned *indirectly* to the address.

You can also *directly* assign keywords of higher levels.

The difference between direct and indirect assigning will only be of interest when, e.g. you are querying keywords.

- Issue the command »Insert: Keywords: Assign«.



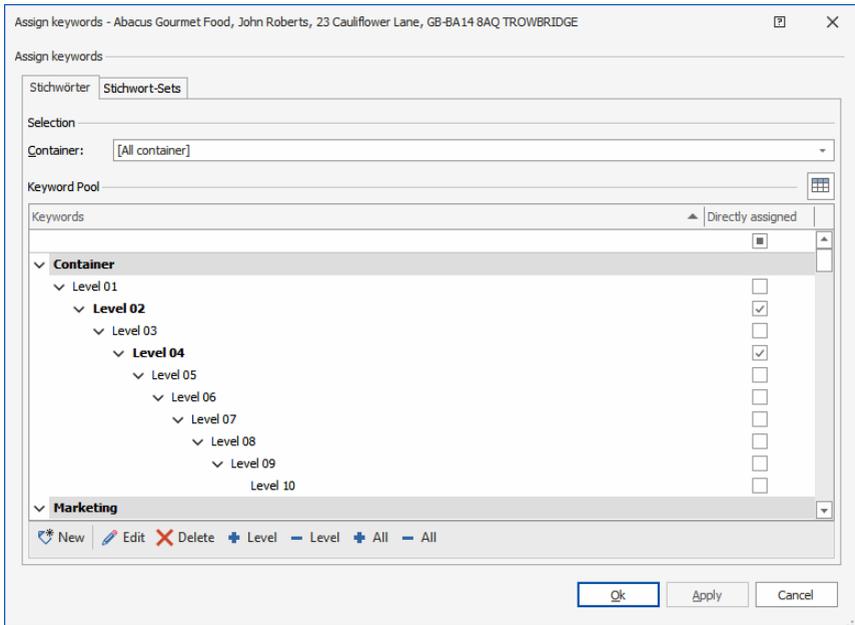
- Mark here, as shown above, the keyword of the fourth hierarchy level by clicking the option box to the right.

The keyword is now assigned to the address directly. The higher-level keywords will be assigned indirectly.

KEYWORDS

Container	Hierarchy	Keyword
bc	bc	bc
Container	Level 01 - Level 02 - Level 03	Level 04

You can also directly assign keywords of other levels.

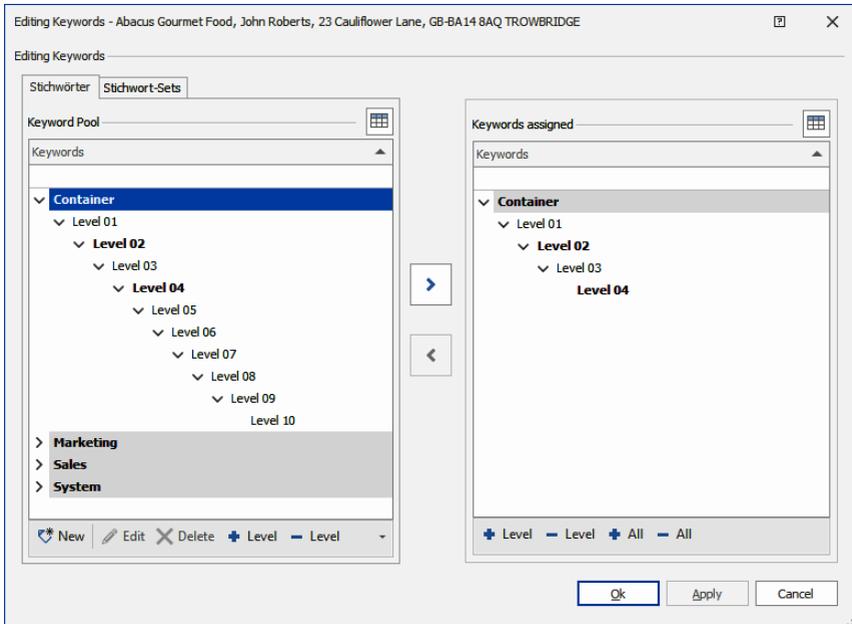


- Mark the keywords required by clicking their option box at the right.

KEYWORDS

Container	Hierarchy	Keyword
abc	abc	abc
Container	Level 01	Level 02
Container	Level 01 - Level 02 - Level 03	Level 04

You can edit the keywords by double-clicking the keyword table. You can identify any keywords assigned directly by their bold font.



In the example shown »Level 02« and »Level 04« were assigned *directly*. Then again, the keywords »Level 01« and »Level 03« were assigned *indirectly*, together with the other keywords.

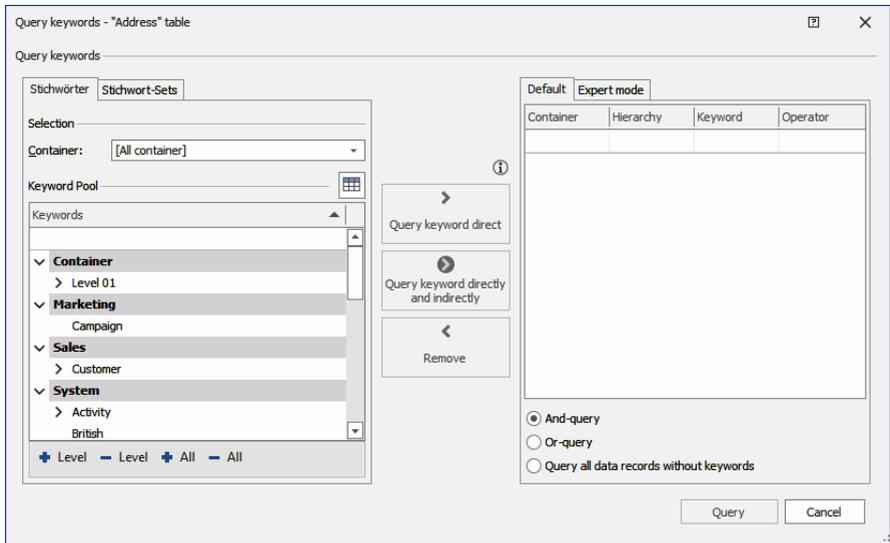
Keywords assigned directly will be taken over separately into the keyword table. You can also identify them by their bold font.

KEYWORDS		
Container	Hierarchy	Keyword
pc	pc	pc
Container	Level 01	Level 02
Container	Level 01 - Level 02 - Level 03	Level 04
Marketing	Campaign	Campaign
System	British	British
System	Campaign	Order
System	CustomerType	A
System	Roadshow	London
System	VIP	VIP
System	Xmas	Letter

Keyword Query

The option of creating keyword hierarchies has modified querying keywords.

- Issue the command »Query: Further queries: Keywords«.



- Mark a keyword.
- You are now either querying addresses that were assigned one or more keywords *directly*
- or you are querying addresses that were assigned one or more addresses *directly or indirectly*.

The page features two large, thick blue curved shapes. One is a wide, shallow arc on the left side, and the other is a narrower, deeper arc on the right side, partially overlapping the first one.

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