Tips & Techniques
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Choice Lists

Many of the information fields used to enter data into the Collector's Assistant are supported by choice lists which often eliminate the need to type in information. Examples include country, coinage metal, author, etc.

Carlisle preloads many choice lists with common selections, however the user may customize these choice lists to meet their specialized needs.
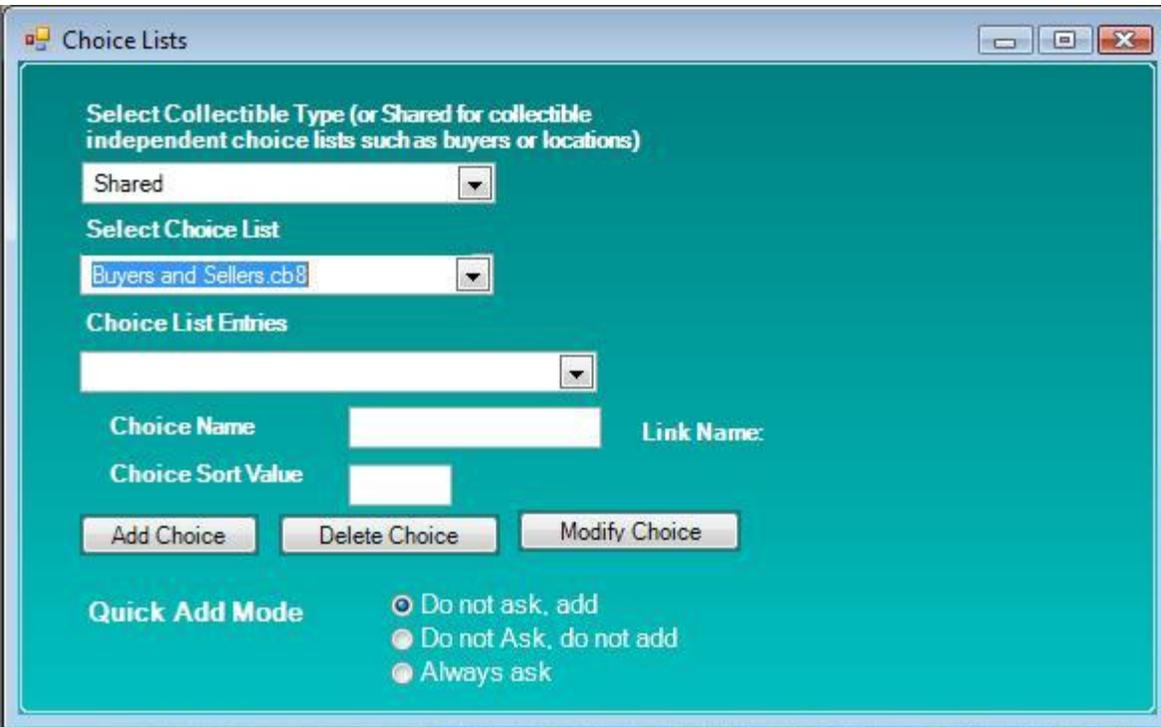
Entries may be added to choice lists either by directly editing the choice list contents or automatically, anytime the user types something into a choice list which is not already on the available choices. Entries may also be deleted to eliminate choices that are never used or removed mis-spelled entries.

Choice lists are grouped by Collectible. For example, there are a group of choice lists pertaining to the collectible "coin" and a separate group to "paper money" or "home inventory". There is also a special grouping of choice lists which are not collectible specific. This includes Buyer and Sellers and Locations and Containers.

There are also a few examples of linked choice lists. A linked choice list incorporates 2 information fields, each supported by a choice list. Each entry in the parent list has its own entries in the linked list. There are two examples of linked lists in the Coin Collector's Assistant (Locations-Containers) and (Country-Denominations). Each location has its own containers and each country has its own denominations. Modification of the linked choice list contents requires special procedures.

Adding/Deleting choices to a choice list

All choice lists may be edited by selecting "Choice Lists" under the User Preferences Group. When you click on Choice Lists, a screen will appear allowing you to customize the contents of all choice lists that appear throughout the product. First you must select the grouping which contains the desired choice list. Usually this will be the collectible, but for locations/containers and buyers and sellers it will be "Shared".

To edit a choice list

Select the Collectible Type or "Shared"
Select the desired choice list in the dropdown labeled Select Choice List.
The choice list will consist of a descriptive name followed by the extension .cb8

Once selected the Choice List Entries dropdown will be populated with its current choices. You may then add, modify or delete choices.

To add a choice, enter the new text into the Choice Name box and click on Add Choice.

To delete a choice, select it in the Choice List Entries dropdown and then click on Delete Choice.

To modify a choice, select it in the Choice List Entries dropdown, modify its Choice Name and/or Sort Value and then click on Modify Choice.

Editing Linked Choice Lists

There are special choice lists, whose name begins with the word Link, for example LinkContainers. Linked choice list require more information as each entry in such a list must be associated with a choice in the parent list.

Choices in Linked lists may only be added or deleted. Deleting a choice is accomplished in the same manner as regular lists. But when adding a choice you must also enter the value in the parent choice list into the Link Name box. For example, if the location choice list contained an entry Bank, and you were adding a Safety Deposit Box 100, you would enter Bank into the link name field prior to clicking on Add Choice.

<u>Automatic addition of entries to a choice list</u>

The Quick Add mode defines what will happen if the user types data into a field supported by a choice list which does not match with an available choice. There are three possibilities:
- Do not ask, Add – new entries will be automatically added to the choice list
- Do not ask, Do Not Add – new entries will be stored for the current item in your collection being edited, but they will not be added to the choice list for future selection
- Always Ask – the user will be asked each time whether or not to add the new choice.

Notes regarding Quick Add operation:
- *Quick add is functional for all normal choice lists and also the parent choice list of a linked list. Quick Add is not functional for the linked list. For example, a new location may be added using Quick Add but not a container.*
- *Entries added via Quick Add mode will not appear on the choice lists for any currently open collection windows until they are re-opened.*