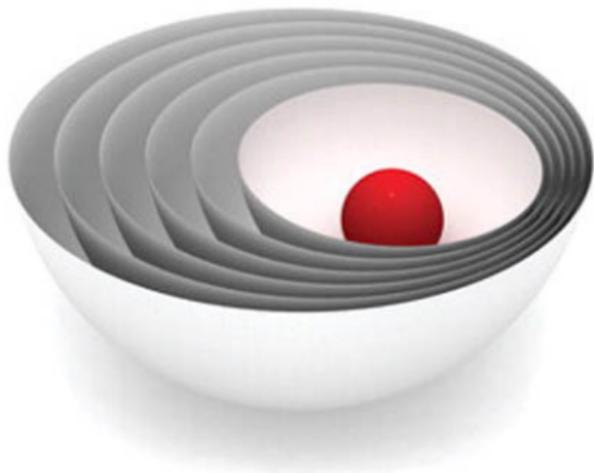


the
FileMaker[®]
Bento
Book

Beauty and Simplicity in Digital Organization



the Bento Book: Beauty and Simplicity in Digital Organization

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Introduction

Welcome to Bento...and Bento 2

The Database for the Rest of Us

Bento is a product from FileMaker, which is owned by Apple. Designed to bring FileMaker's database expertise to users of Mac OS X Leopard and later, it integrates data from iCal, Mail, and Address Book with databases that you can create from your own data as well as imported data from other sources.

Bento is lightweight in its structure but heavyweight in its capabilities. Because it builds on so many years' (actually decades') worth of experience with users and their needs both at FileMaker and at Apple, it is responsive to the frequently expressed needs and frustrations of people who need more organization than a word processing document or spreadsheet can provide but less complexity than a full-featured multiuser database might provide. Organization is the key to making information usable. Four items that are organized (ideas, recipes, addresses, bills, or shoes) can be more useful than a thousand items that are scattered around helter-skelter with no organization scheme.

Released in beta in the fall of 2007 and in a final version in early winter 2008, Bento caught on immediately. The response was positive both in reviews and in user comments. Because the Bento team is so agile and also because its design is so simple yet sophisticated, it was possible to produce a second version of the software within a year.

IN THIS INTRODUCTION

- The Database for the Rest of Us 1
- How This Book Is Organized 4
- Downloadable Files and Web Support 6

2 Introduction

This book shows you how to use Bento—both the first version and Bento 2. There are significant differences to the user interface between the two versions, but the basic functionality is the same. Figure IN.1 shows one of the sample Bento libraries in Bento 1.



Figure IN.1
Bento 1 in action.

In Figure IN.2, you see the same library in Bento 2.

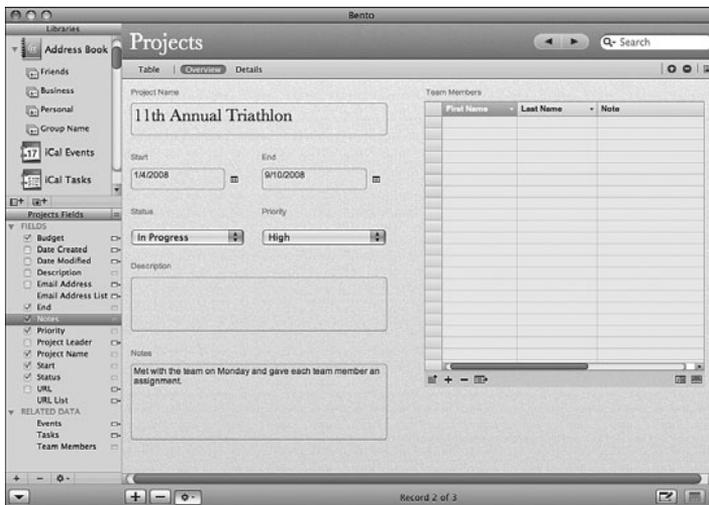


Figure IN.2
The library in Bento 2.

 The most significant difference that you can see in comparing the two versions is that the Source list (at the left in Bento 1) and the Fields list (at the right in Bento 1) now share the same Libraries & Fields pane at the left in Bento 2. There are many other changes. One of the most important is the ability to split the main part of the window into two views, as shown in Figure IN.3. Watch for the New in This Version icon in the book for more Bento 2 features.

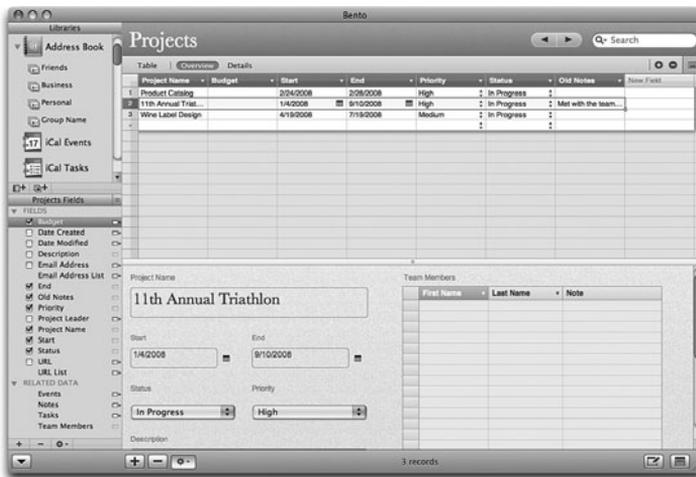


Figure IN.3

In Bento 2, you can split the window display in two.

There are many more changes in Bento 2. Just a few of the highlights are

- You can include messages from Apple Mail in your Bento libraries in the same way you can include iCal and Address Book data.
- You can enter data directly into the Table view, as shown at the top of Figure IN.3.
- Bento now supports more import and export formats.
- You can also save a Bento library as a template.
- Field types can be changed.
- Related records have more functionality, including the ability to click to go to a specific related record and, from that record, to return to the original record (“hot relations”).
- And many, many more features as you will see in the book.

If you are still using Bento 1, have no fear. Where differences exist in functionality or the interface, both are described and illustrated.

How This Book Is Organized

This book shows you how to use Bento, and it presents a number of projects that you can use (with or without modification). The projects are designed to illustrate the types of tasks that you can perform with Bento. You may choose to mix and match features and functionality from various projects to create your own solutions.

The general structure of the book is as follows:

- In the first few chapters, you see how to use the built-in Bento libraries.
- Next, you see how to customize them.
- Then you see how to import data from another source, such as a spreadsheet.
- Finally, you see how to create and share libraries for data that you enter from scratch.

Along the way, the chapters explore various combinations of these techniques. Here is a summary of the chapters in the book:

- Chapter 1, “Bento: The Database for the Rest of Us,” provides the introductory overview of Bento. It shows how you can organize your data, and it describes the basic Bento terminology, which consists of just four words. You see how to use the Bento window in both versions and how to set preferences.
- Chapter 2, “Using the Bento Window,” uses the built-in Notes library to show you how to add and delete records, enter data, and find it (both using a simple and advanced find technique).
- Chapter 3, “Working with Bento Forms,” uses the built-in Classes library to explore how you can customize libraries with themes, columns, labels, shading, text size, and text boxes.
- Chapter 4, “Building a Bento Library from Your Own Data,” provides a quick overview of how to import data from another source such as a spreadsheet. This topic is explored in more depth in Chapter 15, “Importing and Exporting Bento Data and Libraries.”
- Chapter 5, “Working with Phone, URL, IM, and Address Fields and Lists in Contacts,” explores the built-in Contacts library. You see how to use multiple forms and how to work with lists of phone numbers, URLs, addresses, emails, and IMs. The integration with Mail is explored both in Bento 1 and Bento 2 (there are some differences), and you see how to add fields to a form.
- Chapter 6, “Working with Bento Fields and Calculations,” shows how you can use calculation fields to make your data entry faster and more accurate. The built-in Exercise Log serves as the example.
- Chapter 7, “Expanding the Inventory Library with Related Records and Collections,” delves into the concept of related records. You see how to take the built-in Inventory library and modify it so that it reflects additions or subtractions to or from inventory in a live, on-hand value.
- Chapter 8, “Using Built-In Bento Libraries for Address Book,” explores one of the most powerful parts of Bento: its integration with Address Book in Mac OS X. Bento accesses the Address Book data, and it is always live in the Bento display as well as in the Address Book display. (You also see how this ties into MobileMe so that the data in Bento and Address Book is automatically synchronized with data elsewhere in your computing environment.)

- Chapter 9, “Using Built-In Bento Libraries for iCal Tasks and Events,” continues to look at how Bento is automatically integrated with your data on Mac OS X. This time, the iCal data is considered.
- Chapter 10, “Working with Bento’s Projects Library to Use Related Records from iCal Tasks, iCal Events, and Address Book,” shows how the built-in Bento Projects library uses the technologies described in Chapters 7 through 9. Related records from the built-in Mac OS X applications are associated with specific projects. This allows integration so that, for example, iCal can display tasks and events over a period of time and across many projects while you can view each project separately in Bento. Furthermore, the integration of iCal and Address Book with MobileMe means that your Bento tasks, events, and contacts are automatically available on all your synchronized devices from Macs to PCs to iPhones. This chapter also shows the new Bento 2 feature that lets you integrate messages from Mail with your Bento libraries.
- Chapter 11, “Designing a Projects Library with Related Notes,” shows how you can customize the built-in Projects library with structured notes. This capability allows you to enter and browse comment and note data by date or other categories. Notes differ from tasks and events not only in that they are stored totally in Bento, not in iCal, but also because notes are a record of what has happened and been discussed in a project—the past, as well as the future events and tasks. For many people, this library may be all the project tracking they need.
- Chapter 12, “Building a Garden/Nature Log,” builds a customized project from scratch. This project is good for a kid, class, or family. It integrates observations, measurements, and photos of a garden or natural world with Bento. It also shows how you can perform complex or tricky calculations with Bento’s summary row and Smart Collections (as in calculating the last frost date—a date that is characterized by the fact that you do not know the date of the last frost until all possible subsequent frosts have not happened).
- Chapter 13, “Organizing a Group Project with Bento,” shows how to use Bento as the core of a multiuser project. Bento is designed for a single user, but this is a great way for a person (teacher? project leader? committee chair?) to pull a group project together.
- Chapter 14, “Creating a Storyboard with Bento,” focuses on organizing a visual project and shows how you can keep track of all the related storyboard project aspects, such as locations, costumes, actors, and props. You can also integrate notes and visuals into the storyboard itself. Storyboard can help you organize everything from a political commercial to a family history.
- Chapter 15, “Importing and Exporting Bento Data and Libraries,” explores Bento data import and export. You also see how to use the Bento 2 features that allow you to create and use your own Bento library templates.
- Chapter 16, “Managing an Email List from Constant Contact or Vertical Response with Bento,” takes a common real-world problem and explores how you can use Bento to help you. Managing an email list is more than just tracking names and addresses. In this chapter you see the basics of importing and exporting addresses to and from the major bulk-mailing programs.
- Chapter 17, “Bento Quickies,” provides tips and suggestions for a number of projects. Because you have already seen how to use Bento, these quickies can point you in interesting directions in just a paragraph or two.

Special Features

This book includes the following special features:

- **Chapter roadmaps:** At the beginning of each chapter is a list of the top-level topics addressed in that chapter. This list enables you to quickly see the information the chapter contains.
- **Notes:** Notes provide additional commentary or explanation that doesn't fit neatly into the surrounding text. Notes give detailed explanations of how something works, alternative ways of performing a task, and other tidbits to get you on your way.
- **Tips:** This element gives you shortcuts, workarounds, and ways to avoid pitfalls.
- **Cautions:** Every once in a while there is something that can have serious repercussions if done incorrectly (or, rarely, if done at all). Cautions give you a heads-up.
-  **New in This Version icon:** This icon identifies new features in Bento 2.
-  **Cross-references:** Many topics are connected to other topics in various ways. Cross-references help you link related information together, no matter where that information appears in the book. When another section is related to one you are reading, a cross-reference directs you to a specific page in the book on which you can find the related information.

Downloadable Files and Web Support

For updates to the book, see the author's website, www.northcountryconsulting.com and the book's website, www.thebentobook.com. There is also a Facebook Page for the book at www.facebook.com/pages/The-Bento-Book/23722243212.

Downloadable files for this book are available on the Web:

- www.thebentobook.com.
- www.informit.com/title/9780789738127

FileMaker is the developer of Bento. There are a number of resources on the FileMaker site:

- www.filemaker.com/bento gets you to the basic Bento page.
- There is a discussion forum for Bento at <http://forums.filemaker.com/fmbnto/>.

3

Working with Bento Forms

Working with Forms

In Chapter 2, “Using the Bento Window,” you saw how to use the Fields list (Bento 1) or Libraries & Fields pane (Bento 2) to add fields. This chapter continues the discussion of fields and forms.

Every Bento library can be shown in a table view. At the top of the Bento window, you will see that for that library you can select either the table view or a form view. The table view is identified as “Table”; you can name the form views—and, yes, there can be more than one form view for a Bento library, but there can only be one table view.

This chapter begins by exploring the Classes template; its table view is shown in Figure 3.1. It contains a single record that is part of the template.

IN THIS CHAPTER

- Working with Forms 43
- Customizing a Form with Themes 47
- Customizing a Form’s Fields 48

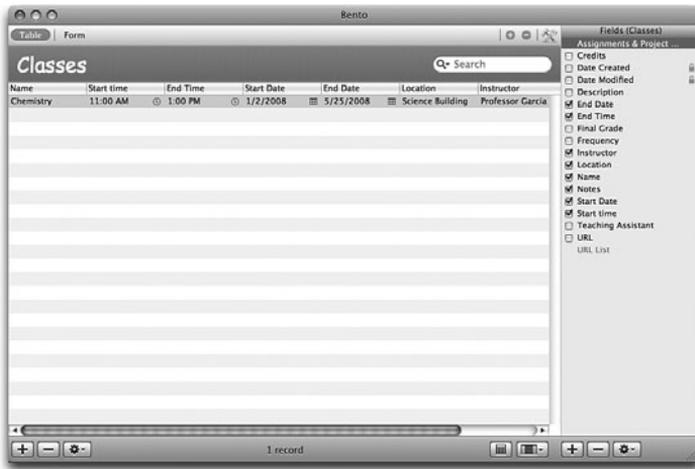


Figure 3.1
 Display the Classes template in table view in Bento 1.

The table view in Bento 2 is much the same as you can see in Figure 3.2. The biggest difference is that in Bento 1, the table view looks like iTunes, whereas in Bento 2, it looks more like a spreadsheet.



Figure 3.2
 Display the Classes template in table view in Bento 2.

The differences in functionality were described in Chapter 2. As far as the fields in the library that are shown in the table view, the difference is that the list is at the lower left in Bento 2 and at the right in Bento 1. In both cases, you select the fields to be shown in the table view by using the checkbox to the left of the field name. Because there is only one table view in a library, whether a field is displayed in that table view is an attribute of the field, and it can be set in the Fields list.

You can switch from table view to form view by clicking Form at the upper left of the Records area. The Classes form view is shown in Figure 3.3 as it appears in Bento 1.

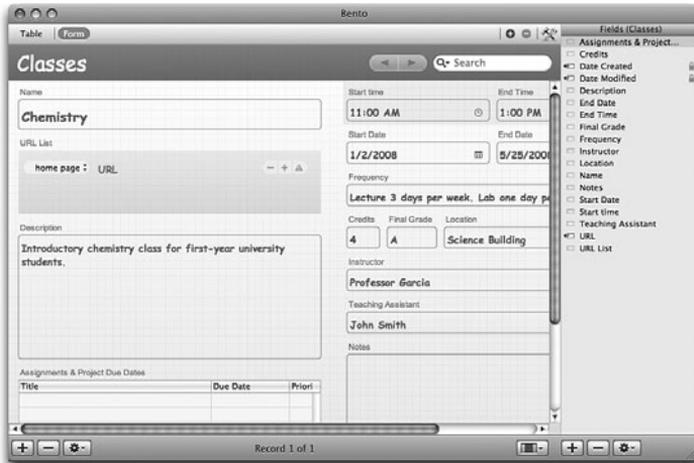


Figure 3.3

You can view the data in form view in Bento 1.

There are more differences between Bento 1 and Bento 2 when it comes to form views. Compare Figure 3.4, the Bento 2 version of the form, with Figure 3.3, the Bento 1 version.

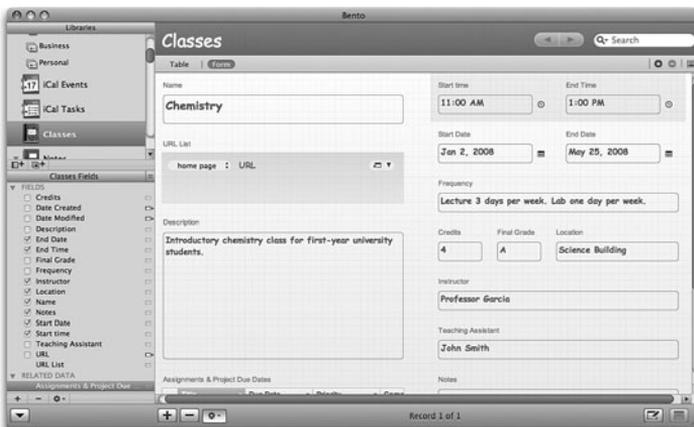


Figure 3.4

The Classes form view is shown in Bento 2.

First, note that in Bento 1, to the left of each field name is a small icon that indicates if that field can be dragged into the form. (The field is not already in the form because a field can only appear in a form once.) That icon appears in Bento 2 to the right of each field name. As you switch from one form

to another, the icons are updated in both Bento 1 and Bento 2 to reflect whether you can add the field to the form.

Note that in Bento 2, the Fields list makes a distinction between fields in the current library and those in related data. You can see this clearly in the Assignments & Projects field, a field that shows related records from iCal. In Bento 2, it clearly shows up as a related records field, whereas in Bento 1, it and any other related records fields are displayed alongside the library's fields.

In form view, you are able to rename a form, create new forms, and delete a form. (Except for the last one; there must always be at least one form in the library.)

To change a form's name, double-click its name to open the dialog shown in Figure 3.5. (This is the name of the form itself; it appears to the right of Table and among any other forms. To change the name of the library, click its name—Classes in this case.) You can also use Forms > Rename Form. Here, the form in the template is called Form. For this chapter, you are modifying that form. The safest way to do that is to rename it "Original Form" and then to duplicate it and work on the duplicate. Thus, Figure 3.5 shows you the first step in the process.

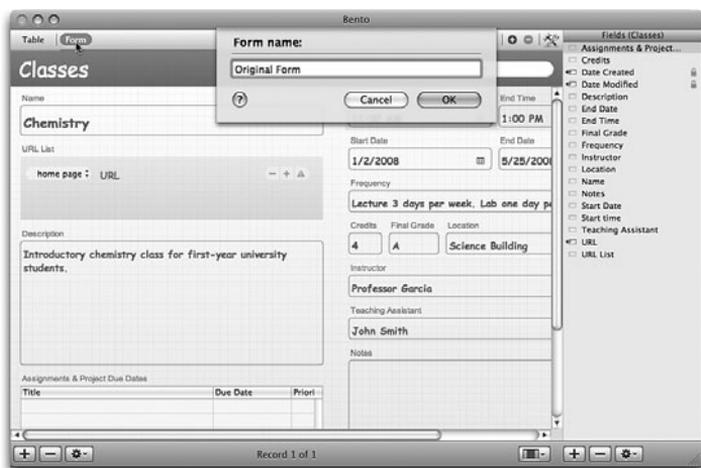


Figure 3.5
Rename a form.

The second step is to duplicate the form by choosing Insert > Duplicate Form in Bento 1 or Forms > Duplicate Form in Bento 2. Bento then duplicates the original form; its default name has "Copy" at the end. The next step is to rename the duplicate form from "Original Form Copy" to "My Form." Now you are ready to go.

Customizing a Form with Themes

Like Keynote with its styles, Bento lets you apply visual themes to your forms. These coordinated appearances combine a selection of colors and fonts in various styles. With a form selected, you can change its theme by choosing **Format > Theme**. Unlike Keynote, Bento does not allow you to change the details of the themes. However, because of the large number of provided themes, you are likely to find themes that you like.

A Bento theme is totally separate from your data. That means you can switch themes at any time without affecting your data. The various templates use a variety of themes, but you can change them at will.

If you want to be sophisticated about your Bento themes, you can select several of them to use for specific purposes, such as displaying confidential data from work, displaying social data, and the like.

Themes are applied to the active form; when you next go to a table view, that theme is applied to the table. If you then go to a form in the library that uses a different theme, that other theme is applied to the table view when you navigate from the second form to the table view.

With Bento 2, there are more than two dozen themes available. You can select a theme from **Forms > Choose Theme**. The first item in the submenu is **Theme Chooser**. It lets you select a theme and try it out. The Bento window behind the Theme Chooser dialog is visible using the new theme.

Some examples of Bento themes are shown in Figure 3.6.

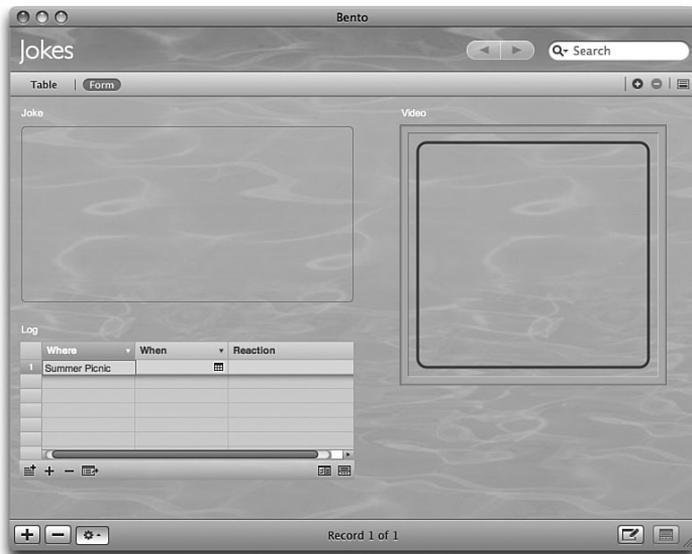


Figure 3.6

Bento has a variety of themes.

Customizing a Form's Fields

To customize a library's table view, you use the Fields list (to control which fields are shown) and directly manipulate the table. You can reorder columns, show or hide the summary row, and change column width. In Bento 1, you modify a form view by choosing View > Customize Form or by clicking the customize form button at the upper right of the Records area. In either case, the search field is replaced by Customize Form with an X to its right. To exit from Customize Form, click that X.

 In Bento 2, you can customize a form by clicking on the edge of a field to move or change it. Figure 3.7 shows how you can access the customization options for a form. If you click in the field itself, you are able to enter data. Clicking on its border shows handles that you can use to resize the field, as shown in Figure 3.7. When the handles are visible, you can drag on the field's border to move it. If you click in the center of the field, the handles disappear, and you are able to enter data. This and the other interface elements described in this section replace the Customize Form mode in Bento 1.



Figure 3.7
Move and reshape fields in Bento 2.

When you start to customize a form in Bento 1, new tools appear at the bottom of the form view; in addition, guides appear on the form. Among the customization tools is a Themes tool that lets you select themes just as you can do by choosing Format > Themes. In Bento 2, a button in the lower-right corner of the window controls whether the form tools are shown or hidden as does View > Show Form Tools, as shown in Figure 3.7.

Bento puts the labels in the appropriate location and coordinates their appearance with the appearance of the relevant field using the currently selected theme. When you drag a field from the Fields list or Libraries & Fields pane into a form that you are editing, an outline of the label and data field appears as soon as you move your mouse into the Records area, as shown in Figure 3.8.

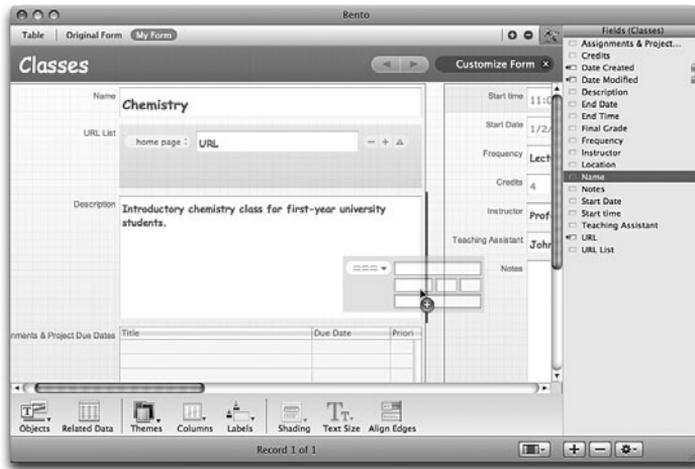


Figure 3.8

Bento automatically provides the label and data entry fields.

Some fields require more than one data entry element; if so, they are shown in the outline and are placed in the form as soon as you release the mouse button. A heavy line shows you where in the form the new field and label are placed. In Figure 3.8, a URL list is being placed on the form; it is one of the field types that require several elements for display and entry.



For more details about these composite data fields, see Chapter 5, “Working with Phone, URL, IM, and Address Fields and Lists in Contacts,” p. 69.

After a field and its label have been placed on a form, you can change its width or height by selecting it and dragging the right or bottom border. You can also rearrange fields; just drag them up or down or from column to column. Everything is taken care of for you by Bento: fields move aside as needed. And, of course, the tab order remains logical (top to bottom and left to right in column one, and then on to column two with the same ordering). To rearrange fields after you have already added them, in Bento 1 you choose View > Customize Form, and in Bento 2, you click the border of a field to begin editing it.

Bento provides you with several formatting objects that you can add to a form. Figure 3.9 illustrates three of them.



Figure 3.9

Use form objects to help format a form.

The line beneath the two images is a *horizontal separator*. Another object, a *spacer*, has been added before the Date Created field. Also, a column separator has been added to the right of the column containing the images. Of these objects, only the horizontal separator is visible when you have finished editing the form (by clicking in another field or going to another form). Figure 3.10 shows the result. You can tell that a third column has been added to the form by the position of the horizontal scrollbar at the bottom of the form. In Figure 3.10, it has been moved so that the third column is visible.

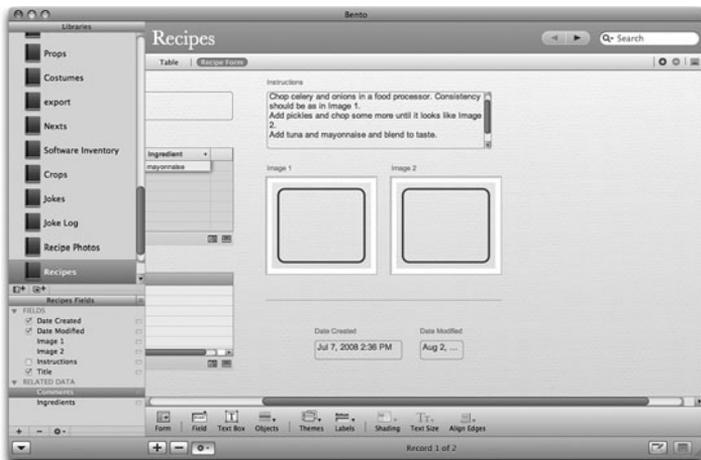


Figure 3.10

Only the horizontal rule is directly visible in the finished form.

The Form tools in Bento 1 and Bento 2 are mostly the same, but there are some differences. Table 3.1 describes each of the tools from left to right and provides keyboard equivalents. In the case of tools that are different in the two versions, that difference is noted. If no version difference is indicated, the tool works the same in both Bento 1 and Bento 2.

NOTE

Figures illustrating the use of the various tools are referenced in Table 3.1. Some of them occur in later chapters.

Table 3.1 Form Tools

Tool	Equivalent	Purpose	Version Differences
Form	Double-click form name in the navigation bar or Forms > Rename Form.	Change a form's name (Figure 3.5).	Bento 2
Field	Opens the Create a Field dialog	Open the Create a Field dialog (Figure 6.2).	Bento 2 In Bento 1, a choice in the Objects tool
Text Box	Insert > Text Box	You can type anything you want in the text box, and you can move it around the form just like a field. Unlike a field, this is not data from your library; it is simply text that appears on the form.	Bento 2 In Bento 1, a choice in the Objects tool
Objects	Insert > Horizontal Separator Insert > Column Divider Insert > Spacer	A spacer is a blank area that also can be moved around. You use it to add space between fields. There is also a horizontal separator (a line) that can be used to separate groups of fields.	See Field, Text Box, and Columns for Bento 1 differences
Related Data	Insert > Related Records List	Open the Create a Field dialog with Related Records List selected for Field Type.	Bento 1
Themes	Bento 1: Format > Theme Bento 2: Forms > Choose Theme	Select a theme.	Theme Chooser only available as the first choice in Bento 2

Continues...

Table 3.1 Form Tools (continued)

Tool	Equivalent	Purpose	Version Differences
Columns	Format > Columns	Choose 1-5 columns for the form.	Bento 1
Labels	Bento 1: Format > Labels Bento 2: Forms > Labels	Choose Above or Beside for position of labels on all fields in the form.	Bento 2: can also choose small, medium, and large size
Shading	Bento 1: Format > Shading Bento 2: Forms > Shading	Choose None, Light, or Dark for selected field(s).	
Text Size	Bento 1: Format > Text Size Bento 2: Forms > Text Size	Choose Smallest to Largest for selected field(s).	
Align Edges	Bento 2: Forms > Align Right Edges	Align right edges of selected objects. Other edges remain where they were.	

TIP

Be wary of going overboard with these design elements. If you find yourself needing to organize your forms with spacers and separators, maybe you would be better off splitting your form into two separate forms. As you see in Chapter 7, “Expanding the Inventory Library with Related Records and Collections,” you can use collections and related records to bring whole sets of data onto a form in a simple way. Bento works best for most people when you can see all the data elements in a form without scrolling the window.

The field consists of the label and the data entry section(s); a background may be shaded for the entire rectangle that contains these elements. In the Format menu or the tools at the bottom of the Customize Form view, you can choose the degree of shading you want. They can be effective in highlighting essential (or nonessential) information as long as you use shading consistently.

You can also change the size of the text in the data fields, although the size of the label text is changeable only in Bento 2. Finally, you can select two or more fields and align their right edges. You do this by expanding the narrower fields’ widths so that all are consistent.

Index

A

access to personal databases, 9-10

accounts, creating, 11

Activity field (Garden/Nature log), 170

Add Field command (Card menu), 116

Address Book

- Address Book library
 - adding fields to, 116-118
 - adding forms to, 116
 - Bento/Address Book integration, 115-116
 - creating, 113
 - example, 114-115
- contacts, sharing with MobileMe, 148-150
- limitations of, 8
- related record fields, implementing, 196
- synchronizing
 - definition of, 118
 - with iPhone, 121-123
 - with MobileMe, 118-120

- with MobileMe push technology, 124
- with PDAs, 123
- updating with data detectors, 124-125
- working with, 142-146

Address Book and iCal Setup command (File menu), 13

Address Book library. *See also*

Address Book

- adding fields to, 116-118
- adding forms to, 116
- Bento/Address Book integration, 115-116
- creating, 113
- example, 114-115

address fields

- adding to forms, 72-73
- in Bento 1, 69-70
- in Bento 2, 70-72
- overview, 69

Advanced Find, 31-33

Amount field (Garden/Nature log), 170

analyzing Garden/Nature log database, 173-175

ARPAnet, 208

as-of dates, 168

automatic counter fields, 16, 89

automatic login, 10

B

backing up hard disk, importance of, 123

Bento 1 compared to Bento 2, 1-3

Bento discussion forum, 6

Bento menu commands, Preferences, 40

Bento preferences, setting, 40

Bento Quickies

- Clippings, 229
- Fashion Parade, 231
- Gift List, 232
- Jokes, 230
- Nexts, 226-227
- Nos, 229-230
- overview, 225
- Recipes, 230-231
- Shopping Sources, 231
- Software Inventory, 227-228

Bento window

- controlling which sections are displayed, 22-23
- Fields list, 22, 37-38
- overview, 21-22
- Records area, 22
 - creating records, 27
 - deleting records, 33
 - entering text data, 27-28
 - finding data, 29-33
 - overview, 24-26
 - printing records, 28-29
- Source list, 22, 37

bidirectional relationships, 191**bulk email (spam)**

- CAN-SPAM act, 210-211
- downloading bulk email data to Bento
 - with Constant Contact, 222-223
 - with Vertical Response, 220-222
- ISP rules, 210
- mail filters, 209-210
- overview, 208-209
- sending via vendors, 211-212
- uploading bulk email data from Bento, 213-214
 - with Constant Contact, 217-220
 - with Vertical Response, 214-216

C**Calculation dialog, 82-83****calculation fields, 17**

- Calculation dialog, 82-83
- Calories Burned field, 86
- Duration field, 84-85
- overview, 82

calendar data (iCal), managing, 130, 135-137. See also iCal**Calendar list (iCal), 128****Calories Rate field (Exercise Log), 81-82****CAN-SPAM act, 210-211****capabilities of Bento, 8-9****Card menu commands, Add Field, 116****cardinality, 178****changing field types, 14****checkbox fields, 16, 88-89****checking spelling, 27****choice fields, 16, 87****Classes template**

- table view, 43-44
- form view, 45-46

cleaning up imported data, 62-63**Clippings Bento Quickie, 229****clippings, organizing into Bento Quickie, 229****collections**

- adding records to, 108
- creating empty collections, 108
- creating from selected records, 109
- definition, 18, 107
- example, 107
- overview, 18-19
- Smart Collections, 19-20, 109-111, 173-175

columns, 190**command-separated-values (CSV) data, importing, 57-62****commands**

- Bento menu, Preferences, 40
- Card menu, Add Field, 116
- Edit menu, Delete Library, 24
- File menu
 - Address Book and iCal Setup, 13
 - Export, 206
 - Import, 23, 58
 - New Collection, 108
 - New Library, 23, 154
 - New Smart Collection, 109
 - Print, 28
- Format menu, Themes, 48
- Forms menu
 - Duplicate Form, 46
 - Rename Form, 46
- Insert menu
 - Current Date and Time, 27
 - Delete Field, 38
 - Duplicate Field, 38
 - Duplicate Form, 180
 - New Field, 38, 156
- Records menu
 - Advanced Find, 31-33
 - Delete Selected Record(s), 33
 - Duplicate Record, 27
 - New Record, 27
- Edit menu, Spelling, 27
- View menu, Customize Form, 48

communicating with multiple people, 208**complexity, managing with Bento, 189-191****computers, definition for MobileMe synchronization, 120**

configuring Bento preferences, 40**Constant Contact**

- downloading bulk email data to Bento, 222-223
- uploading data from Bento, 217-220

contacts (Address Book), sharing with MobileMe, 148-150**Contacts library**

- address fields
 - adding to forms, 72-73
 - in Bento 1, 69-70
 - in Bento 2, 70-72
 - overview, 69
- creating, 66-67
- lists
 - adding to forms, 72-73
 - in Bento 1, 69-70
 - in Bento 2, 70-72
 - overview, 69
- overview, 65-66
- views, 67-69

converting

- between events and To Do items (iCal), 130
- field types, 14

counters, automatic, 16, 89**Crops database, 170-171****Crops field (Garden/Nature log), 170****CSV (command-separated-values) data, importing, 57-62****currency fields, 16****Current Date and Time command (Insert menu), 27****Customize Form command (View menu), 48****customizing**

- fields, 148
- forms, 148
 - fields, 48-50
 - themes, 47
- Projects library, 153

D**data, finding**

- with Advanced Find, 31-33
- with search field, 29-31

data detectors

- with iCal, 134-135
- updating Address Book with, 124-125

data entry

- addresses
 - adding to forms, 72-73
 - in Bento 1, 69-70
 - in Bento 2, 70-72
 - overview, 69
- automatic counters, 89
- calculations
 - Calculation dialog, 82-83
 - Calories Burned field, 86
 - Duration field, 84-85
 - overview, 82
- checkbox values, 88
- choice values, 87
- currency values, 89
- customizing fields, 148
- dates
 - date and time field controls, 79-80
 - Start Date field (Exercise Log), 79
 - Stop Date field (Exercise Log), 77-78
- editing fields, 90-92
- file list fields, 17, 181-183
- form fields. *See* forms

importing data

- into existing libraries, 200-204
- overview, 199

legacy data

- in Bento 2, 63
- cleaning up imported data, 62-63
- CSV (command-separated-values) data, 57-62
- data formats, 54-56
- overview, 53-54

lists. *See* lists

- media fields, 16
- message list fields, 17
- numbers, 81-82
- ratings, 90

related records list fields

- adding data to, 103-105
- adding to forms, 100
- formatting, 101-102
- restrictions on, 105-106
- reviewing related records, 103-104
- summarizing, 103

storyboards

- Image field, 193
- Length field, 193
- Notes field, 193
- Place field, 193
- related record fields, 195-196
- Script field, 193
- Sequence field, 193
- Setting field, 193
- Status field, 193
- Time field, 193
- Title field, 193

text data, 27-28

- times, 79-80

data, exporting

- exporting files from libraries, 205-206
- exporting libraries as templates, 206

data formats, importing, 54-56**data, importing**

- in Bento 2, 63
- cleaning up imported data, 62-63
- CSV (command-separated-values) data, 57-62
- data formats, 54-56
- importing libraries as templates, 206
- into existing libraries, 200-204
- overview, 53-54, 199

data structure (iCal), 132**databases. See personal databases****date and time field controls, 79-80****Date field (Garden/Nature log), 170****date fields, 16**

- as-of dates, 168
- date and time field controls, 79-80
- entering current dates, 27
- Garden/Nature log, 168
- Start Date field (Exercise Log), 79
- Stop Date field (Exercise Log), 77-78

Delete Field command (Insert menu), 38**Delete Library command (Edit menu), 24****Delete Selected Record(s) command (Records menu), 33****deleting**

- fields in Bento 1, 38
- libraries, 24
- records, 33

Details layout (Projects template), 141**dialogs**

- Calculation, 82-83
- Home, 11
- New Library, 23, 67
- Preferences, 12
- Reset Synchronization Data, 120-121
- Theme Chooser, 47

displaying event details, 131**do-not-contact list, organizing into Bento Quickie, 229-230****downloadable files, 6****downloading**

- Bento, 11
- bulk email data from Bento with Constant Contact, 222-223
- with Vertical Response, 220-222

Duplicate Field command (Insert menu), 38**Duplicate Form command**

- Forms menu, 46
- Insert menu, 180

Duplicate Record command (Records menu), 27**duplicating**

- fields in Bento 1, 38
- forms, 46

duration fields, 16, 84-86**E****ease of use (Bento), 9****Edit menu commands**

- Delete Library, 24
- Spelling, 27

editing

- events, 131
- fields, 36, 90-92

email lists

- bulk email (spam)
 - CAN-SPAM act, 210-211
 - downloading bulk email data to Bento, 220-223
 - ISP rules, 210
 - overview, 208-209
 - sending via vendors, 211-212
 - uploading bulk email data from Bento, 213-220
- email lists, 207
- mail filters, 209-210
- Mail records, working with, 146-147

events (iCal)

- converting to To Dos, 130
- displaying event details, 131
- editing, 131
- sharing with MobileMe, 148-150
- synchronizing, 137

Exercise Log library

- automatic counter fields, 89
- Calories Rate field, 81-82
- checkbox fields, 88
- choice fields, 87
- currency fields, 89
- date and time field controls, 79-80
- Duration field, 84-86
- overview, 75-77

rating fields, 90
 Start Date field, 79
 Stop Date field, 77-78

Export command (File menu), 206

exporting data

exporting files from libraries, 205-206
 exporting libraries as templates, 206

F

Fashion Parade Bento Quickie, 231

fields

adding to Address Book library, 116-118
 address fields
 adding to forms, 72-73
 in Bento 1, 69-70
 in Bento 2, 70-72
 overview, 69
 automatic counter fields, 16, 89
 calculation fields, 17
 Calculation dialog, 82-83
 Calories Burned field, 86
 Duration field, 84-85
 overview, 82
 changing type of, 14
 checkbox fields, 16, 88
 choice fields, 16, 87
 creating, 38
 currency fields, 16, 89
 customizing, 148
 date fields, 16
 date and time field
 controls, 79-80
 Start Date field (Exercise Log), 79
 Stop Date field (Exercise Log), 77-78

definition, 13
 deleting, 38
 duplicating, 38
 duration fields, 16
 editing, 90-92
 Exercise Log fields
 Calories Rate field, 81-82
 date and time field
 controls, 79-80
 Start Date, 79
 Stop Date, 77-78
 file list fields, 17
 adding to group projects, 181-183
 form fields, customizing, 48-50
 formatting, 14
 Garden/Nature log fields
 Activity field, 170
 Amount field, 170
 Crops field, 170
 Date field, 170
 date fields, 168
 high/low temperature fields, 168
 Highlights of the Day field, 169
 media fields, 169
 Notes field, 170
 media fields, 16
 message list fields, 17
 names, 14
 Notes field (Project Notes library), 156
 number fields, 16
 Calories Rate field, 81-82
 creating and formatting, 81-82
 rating fields, 16, 90
 related records list fields, 17
 adding data to, 103
 adding to forms, 100
 formatting, 101-105

restrictions on, 105-106
 reviewing related records, 103-104
 summarizing, 103
 removing, 148
 renaming, 38, 148
 storyboard fields
 Image, 193
 Length, 193
 Notes, 193
 Place, 193
 related record fields, 195-196
 Script, 193
 Sequence, 193
 Setting, 193
 Status, 193
 Time, 193
 Title, 193
 text fields, 16
 time fields, 16, 79-80

Fields list (Bento window), 22, 37-38

file list fields, 17

adding to group projects, 181-183

File menu commands

Address Book and iCal Setup, 13
 Export, 206
 Import, 23, 58
 New Collection, 108
 New Library, 23, 154
 New Smart Collection, 109
 Print, 28

FileMaker, 6-7

files

downloadable files, 6
 organizing, 183-184

filters, mail, 209-210

finding data

- with Advanced Find, 31-33
- with search field, 29-31

folders, Library/Application Support/Bento, 13**form view of Classes template, 45-46****Format menu commands, Themes, 48****formatting**

- automatic counter fields, 89
- checkbox fields, 88
- choice fields, 87
- currency fields, 89
- fields, 14
- number fields, 81-82
- rating fields, 90
- related records list fields, 101-102

forms

- adding to Address Book library, 116
- address fields, adding, 72-73
- creating for group projects, 180-181
- dragging related libraries onto, 98-99
- duplicating, 46
- fields, customizing, 48-50
- horizontal separators, 50
- lists, adding, 72-73
- overview, 43
- renaming, 46
- revising, 148
- spacers, 50
- themes, 47
- tools, 51-52

Forms menu commands

- Duplicate Form, 46
- Rename Form, 46

formulas. See**calculation fields**

G

Garden/Nature log

- analyzing database, 173-175
- creating basic library, 167-170
- creating related libraries, 170-172
- planning, 165-167
- Smart Collections, 173-175

Gift List Bento Quickie, 232**group projects**

- Many People = Many Projects structure, 187
- One Person = Many Projects structure, 184-185
- One Person = One Project structure
 - file list fields, 181-183
 - file organization, 183-184
 - form creation, 180-181
 - overview, 179-180
- One Project = Many People structure, 186
- organizing, 178
- planning, 177-178

H

hard disk backups, importance of, 123**Highlights of the Day field (Garden/Nature log), 169****history of storyboards, 192****Home dialog, 11****horizontal separators, 50**

I

iCal, 142-146

- Bento iCal libraries, 132-134
- Calendar list, 128
- calendars, 130
- data structure, 132
- events
 - converting to To Dos, 130
 - displaying event details, 131
 - editing, 131
 - sharing with MobileMe, 148-150
- Mail data detectors with, 134-135
- managing calendar data, 135-137
- overview, 127
- related record fields, implementing, 196
- Search Results pane, 128-130
- synchronizing iCal events, 137
- To Dos, 128
 - converting to events, 130
 - displaying event details, 131
 - editing, 131

.ics files, 132**Image field (storyboards), 193****Import command (File menu), 23, 58****importing data**

- importing libraries as templates, 206
- into existing libraries, 200-204

legacy data
 in Bento 2, 63
 cleaning up imported data, 62-63
 CSV (command-separated-values) data, 57-62
 data formats, 54-56
 overview, 53-54
 overview, 199

Ins & Outs library

creating, 96-98
 dragging onto Inventory library form, 99
 relating to Inventory library, 98-99

Insert menu commands

Current Date and Time, 27
 Delete Field, 38
 Duplicate Field, 38
 Duplicate Form, 180
 New Field, 38, 156

Internet Service Providers (ISPs), bulk email rules, 210

inventory

Inventory library
 overview, 93-96
 tracking inventory with relationships, 98-105
 Software Inventory Bento Quickie, 227-228

Inventory library

overview, 93-96
 tracking inventory with relationships, 98
 adding data to related records list field, 103-105
 adding related records list field, 100

dragging related libraries onto forms, 98-99
 formatting related records list field, 101-102
 restrictions on related records list field, 105-106
 reviewing related records, 103-104
 summarizing related records list field, 103

iPhone, synchronizing

Address Book with, 121-123

ISPs (Internet Service Providers), bulk email rules, 210

iTunes, limitations of, 8

J-K-L

Jokes Bento Quickie, 230

jokes, organizing into Bento Quickie, 230

layouts, 191

legacy data, importing into Bento

in Bento 2, 63
 cleaning up imported data, 62-63
 CSV (command-separated-values) data, 57-62
 data formats, 54-56
 overview, 53-54

legislation, CAN-SPAM act, 210-211

Length field (storyboards), 193

libraries

Address Book library
 adding fields to, 116-118
 adding forms to, 116
 Bento/Address Book integration, 115-116
 creating, 113
 example, 114-115
 Contacts library
 address fields, 69-73
 creating, 66-67
 lists, 69-73
 overview, 65-66
 views, 67-69
 creating, 23, 154-155
 from Projects template, 140-141
 from scratch, 96-98
 definition, 18
 deleting, 24
 email libraries
 downloading bulk email data to Bento, 220-223
 uploading bulk email data from Bento, 213-220
 Exercise Log
 automatic counter fields, 89
 Calories Burned field, 86
 Calories Rate field, 81-82
 checkbox fields, 88
 choice fields, 87
 currency fields, 89
 date and time field controls, 79-80
 Duration field, 84-85
 overview, 75-77
 rating fields, 90
 Start Date field, 79
 Stop Date field, 77-78
 exporting as templates, 206
 exporting data from, 205-206

Garden/Nature log libraries
 analyzing database,
 173-175
 basic library, creating,
 167-170
 related libraries, creating,
 170-172
 Smart Collections,
 173-175

iCal libraries, 132-134
 importing as templates, 206
 importing data into, 23,
 200-204

Ins & Outs
 creating, 96-98
 dragging onto Inventory
 library form, 99
 relating to Inventory
 library, 98-99

Inventory
 overview, 93-96
 tracking inventory with
 relationships, 98-106

naming, 23

Project Notes library
 adding list of related
 records to, 157-160
 creating new library,
 154-155
 creating Notes field, 156
 overview, 154
 relationships, 161-164

Projects library, 139-141
 in Bento 1, 151-152
 in Bento 2, 152
 customizing, 153
 overview, 151

storyboard
 libraries, creating
 Image field, 193
 Length field, 193
 Notes field, 193

overview, 192-193
 Place field, 193
 related record fields,
 195-196
 Script field, 193
 Sequence field, 193
 Setting field, 193
 Status field, 193
 Time field, 193
 Title field, 193

Libraries & Fields pane, 39-40

Library/Application Support/Bento folder, 13

lists

adding to forms, 72-73
 in Bento 1, 69-70
 in Bento 2, 70-72
 Calendar list (iCal), 128
 email lists
 bulk email (spam),
 208-212
 downloading bulk email
 data to Bento, 220-223
 mail filters, 209-210
 overview, 207
 uploading bulk email
 data from Bento,
 213-220
 Gift List Bento Quickie, 232
 overview, 69
 To Dos list (iCal), 128
 converting to
 events, 130

login options, 10

logs, Garden/Nature

analyzing database, 173-175
 creating basic library,
 167-170
 creating related libraries,
 170-172
 planning, 165-167
 Smart Collections, 173-175

M

Mail data detectors

with iCal, 134-135
 updating Address Book
 with, 124-125

Mail records, working with, 146-147

mailing lists. See email lists

managing calendar data (iCal), 135-137

Many People = Many Projects structure (group projects), 187

many-to-many relationship, 178

Mati, Jose, 192

media fields, 16, 169

message list fields, 17

MobileMe synchronization, 118-120, 124, 148-150

moving form fields, 48

N

naming

fields, 14
 libraries, 23

Nature log. See Garden/Nature log

navigating Bento window

controlling which sections
 are displayed, 22-23
 Fields list, 22, 37-38
 overview, 21-22
 Records area, 22
 creating records, 27
 deleting records, 33
 entering text data, 27-28
 finding data, 29, 31-33

overview, 24-26
 printing records, 28-29
 Source list, 22, 37

need for Bento, 8

New Collection command (File menu), 108

New Field command (Insert menu), 38, 156

New Library command (File menu), 23, 154

New Library dialog, 23, 67

New Record command (Records menu), 27

New Smart Collection command (File menu), 109

Nexts Bento Quickie, 226-227

Nos Bento Quickie, 229-230

notes, Project Notes library

adding list of related records to, 157-160
 creating new library, 154-155
 creating Notes field, 156
 overview, 154
 relationships, 161-164

Notes fields

Garden/Nature log, 170
 Project Notes library, 156
 storyboards, 193

number fields, 16, 81-82

O

obtaining Bento, 11

One Person = Many Projects structure (group projects), 184-185

One Person = One Project structure (group projects)

file list fields, 181-183
 file organization, 183-184
 form creating, 180-181
 overview, 179-180

One Project = Many People structure (group projects), 186

one-to-many relationship, 178

one-to-one relationship, 178, 191

organizing. See also

Bento Quickies

files, 183-184
 group projects, 178

Overview form (Projects template), 140

P

panes, Libraries & Fields, 39-40

pasting data into table views, 36-37

PDA's (Personal Digital Assistants), synchronizing Address Book with, 123

personal databases

access to, 9-10
 capabilities of, 8-9
 collections
 definition, 18
 overview, 18-19
 Smart Collections, 19-20

Crops, 170-171
 ease of use, 9
 fields. *See* fields
 libraries. *See* libraries
 need for, 8
 records. *See* records

Place field (storyboards), 193

planning

Garden/Nature log, 165-167
 group projects, 177-178
 storyboards, 189-191

preferences, setting, 40

Preferences command (Bento menu), 40

Preferences dialog, 12

Print command (File menu), 28

printing records, 28-29

procedural programming, 9

programming, 9

Project Notes library

adding list of related records to, 157-160
 creating new library, 154-155
 creating Notes field, 156
 overview, 154
 relationships, 161-164

Projects library, 139-141

in Bento 1, 151-152
 in Bento 2, 152
 customizing, 153
 overview, 151

pull technology, 208

push technology, 124, 208

Q

queries (SQL), 190

Quickies

Clippings, 229
 Fashion Parade, 231
 Gift List, 232
 Jokes, 230
 Nexts, 226-227
 Nos, 229-230

overview, 225
 Recipes, 230-231
 Shopping Sources, 231
 Software Inventory, 227-228

R

rating fields, 16, 90

Recipes Bento Quickie, 230-231

recipes, organizing into Bento Quickie, 230-231

record fields (storyboards), 195-196

Record menu commands, Advanced Find, 31-33

records

adding to collections, 108
 adding to Project Notes library, 157-160
 Address Book records, 142-146
 collections
 adding records to, 108
 creating empty collections, 108
 creating from selected records, 109
 definition of, 107
 example, 107
 Smart Collections, 109-111
 creating, 27
 creating collections from, 109
 definition, 17-18
 deleting, 33
 entering data into. *See* data entry
 iCal records, 142-146

Mail records, 146-147
 printing, 28-29
 related records
 Address Book records, 142-146
 iCal records, 142-146
 Mail records, 146-147
 related records list fields, 100-106
 related records, reviewing, 103-104
 table views
 in Bento 1, 33-35
 in Bento 2, 35-37
 editing fields with (Bento 2), 36
 pasting data into in (Bento 2), 36-37
 sorting (Bento 2), 36

Records area (Bento window), 22

creating records, 27
 deleting records, 33
 entering text data, 27-28
 finding data
 with Advanced Find, 31-33
 with search field, 29-31
 overview, 24-26
 printing records, 28-29

Records menu commands

Delete Selected Record(s), 33
 Duplicate Record, 27
 New Record, 27

related records

adding to Project Notes library, 157-160
 Address Book records, 142-146
 iCal records, 142-146
 Mail records, 146-147

related records list fields, 17
 adding data to, 103-106
 adding to forms, 100
 formatting, 101-102
 restrictions on, 105-106
 reviewing related records, 103-104
 summarizing, 103
 reviewing, 103-104

related records list fields, 17

adding data to, 103-106
 adding to forms, 100
 formatting, 101-102
 restrictions on, 105-106
 reviewing related records, 103-104
 summarizing, 103

relational databases, 190

relationships

bidirectional relationships, 191
 creating
 adding data to related records list field, 103-105
 adding related records list field, 100
 by dragging related libraries onto forms, 98-99
 formatting related records list field, 101-102
 restrictions on related records list field, 105-106
 summarizing related records list field, 103
 definition, 190
 many-to-many relationship, 178
 one-to-many relationship, 178

one-to-one relationship,
178, 191

in Project Notes library,
161-164

reviewing related records,
103-104

tracking inventory with
adding data to related
records list field,
103-105

adding related records
list field, 100

dragging related
libraries onto
forms, 98-99

formatting related
records list field,
101-102

restrictions on related
records list field,
105-106

reviewing related
records, 103-104

summarizing related
records list field, 103

unidirectional
relationships, 191

removing. See deleting

**Rename Form command
(Forms menu), 46**

renaming
fields, 38, 148
forms, 46

**Reset Synchronization Data
dialog, 120-121**

resizing form fields, 48

**reviewing related records,
103-104**

revising forms, 148

roles of Bento, 8-9

rows, 190

S

**Script field (storyboards),
193**

**Search Results pane (iCal),
128-130**

**sending bulk email via
vendors, 211-212**

**Sequence field
(storyboards), 193**

setting Bento preferences, 40

**Setting field
(storyboards), 193**

sharing

Address Book contacts with
MobileMe, 148-150

iCal events with MobileMe,
148-150

**Shopping Sources Bento
Quickie, 231**

**shopping sources, organizing
into Bento Quickie, 231**

**single-value fields in
storyboards, 193-194**

**Smart Collections, 19-20,
109-111, 173-175**

**Software Inventory Bento
Quickie, 227-228**

sorting table views, 36

**Source list (Bento
window), 22, 37**

spacers, 50

spam

CAN-SPAM act, 210-211

downloading bulk email
data to Bento

with Constant Contact,
222-223

with Vertical Response,
220-222

ISP rules, 210

mail filters, 209-210

overview, 208-209

sending via vendors, 211-
212

uploading bulk email data

from Bento, 213-214

with Constant Contact,
217-220

with Vertical Response,
214, 216

spell check, 27

**Spelling command (Edit
menu), 27**

Spotlight, 183

spreadsheets, importing, 63

SQL, 190

**Start Date field (Exercise
Log), 79**

**Status field
(storyboards), 193**

**Stop Date field (Exercise
Log), 77-78**

storyboards

history of, 192

planning, 189-191

storyboard

libraries, creating

Image field, 193

Length field, 193

Notes field, 193

overview, 192-193

Place field, 193

related record fields,
195-196

Script field, 193

Sequence field, 193

Setting field, 193

Status field, 193

Time field, 193

Title field, 193

suitability of Bento for, 192

summarizing related records list fields, 103

synchronizing

- Address Book, 118
 - with iPhone, 121-123
 - with MobileMe
 - with MobileMe push technology, 124
 - with PDAs, 123
- definition of, 118
- iCal events, 137
- MobileMe synchronization, 118-120, 124, 148-150

T

table views

- of Classes template, 43-44
- editing fields with (Bento 2), 36
- in Bento 1, 33-35
- in Bento 2, 35-36
 - editing fields with table views, 36
 - pasting data into table views, 36-37
 - sorting table views, 36
- pasting data into (Bento 2), 36-37
- sorting (Bento 2), 36

tables, 190

temperature fields (Garden/Nature log), 168

templates

- Classes template
 - form view, 45-46
 - table view, 43-44
- exporting libraries as, 206
- importing libraries as, 206

text data, entering into records, 27-28

text fields, 16

Theme Chooser dialog, 47

themes, adding to forms, 47

Themes command (Format menu), 48

time fields, 16

- date and time field controls, 79-80
- entering current time, 27
- storyboards, 193

Time Machine, 123

Title field (storyboards), 193

To Dos (iCal), 128

- converting to events, 130

tools, Form tools, 51-52

tracking inventory

with relationships

- adding data to related records list field, 103-105
- adding related records list field, 100
- dragging related libraries onto forms, 98-99
- formatting related records list field, 101-102
- restrictions on records list field, 105-106
- reviewing related records, 103-104
- summarizing related records list field, 103

types (fields)

- changing, 14
- definition, 13

U

unidirectional relationships, 191

unsolicited bulk email. See bulk email

updating Address Book with data detectors, 124-125

uploading bulk email data from Bento, 213-214

- with Constant Contact, 217-220
- with Vertical Response, 214-216

V-W-X-Y-Z

vendors, sending bulk email with, 211-212

verifying imported data, 62

Vertical Response

- downloading bulk email data to Bento, 220-222
- uploading data from Bento, 214-216

View menu commands, Customize Form, 48

views

- form view, 45-46
- table views
 - of Classes template, 43-44
 - editing fields with (Bento 2), 36
 - in Bento 1, 33-35
 - in Bento 2, 35-37
 - pasting data into (Bento 2), 36-37
 - sorting (Bento 2), 36

web sites, 6