

About TeleMagic Conversion

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All information concerning any upgrade or file conversion to TeleMagic has been incorporated in this Readme Help System. It is intended as a means of allowing users with existing TeleMagic installations to upgrade to the latest version as quickly and efficiently as possible. Not all information will pertain to all users. Information in the Conversion topics do not apply to new users.

If you are a new user, please refer to the [Installing Enterprise V4](#) topic for general instructions on installing TeleMagic for the first time. See the System Administrator Guide for detailed instructions on first-time installation of TeleMagic, and importing any existing databases from other sources. The Conversion topics of the Readme Help System partially or completely replaces the following documents:

- Install.doc
- Upgeval.doc
- 15read.wri
- Dssupg.wri
- Pro2ent.wri
- Upgissue.wri
- V123fcon.wri
- The TeleMagic DOS Conversion Utilities chapter of the System Administrator Guide
- The Troubleshooting chapter of the System Administrator Guide.

Prior to performing any upgrade, you should refer to the [Upgrade Issues](#) topic. This topic provides information about specific preparations that should be performed prior to any upgrade. See the [Upgrades](#) topic to determine which upgrade procedure applies to you.

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[Upgrades](#)

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[Upgrade Issues](#)

Upgrades

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Upgrade Installations:

If you have any version of TeleMagic Enterprise prior to V4, you will need to perform an upgrade. Before upgrading, it is very important that you review the [Upgrade Issues](#) topic. You will find important issues, as well as special instructions for users who are currently in V1.0, in the [Upgrading from TeleMagic V1](#) topic. To avoid potential errors, review this information before proceeding with the upgrade. When you are ready to proceed, launch the Setup program from the CD-ROM and select Install/Upgrade TeleMagic V4 for Windows or add items to an existing V4 installation from the main TeleMagic Setup screen.

Upgrading TeleMagic Professional to TeleMagic Enterprise

If you are upgrading from TeleMagic Professional to TeleMagic Enterprise, refer to the [Upgrading from TeleMagic Professional](#) topic for instructions.

Upgrading from TeleMagic for DOS

Upgrading from TeleMagic for DOS involves creating an import format for your database and importing it into TeleMagic V4. See [Upgrading from DOS versions](#) for more information.

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_____154.BMP<JumpId(readme.hlp;½README_Upgrade_Issues)<<1} [Upgrade Issues](#)
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_____154.BMP<JumpId(readme.hlp;½convert_Upgrading_from_TeleMagic_V1.0)<<1} [Upgrading
from TeleMagic V1](#)
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 [Upgrading from TeleMagic Professional](#)
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
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Your User Count](#)
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½convert_Data_Synchronization_Server)<<1} [Install or
Upgrade Data Synchronization Server](#)

Upgrading Your User Count

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If you have purchased additional users, they must be registered before they will be available in TeleMagic. You will not need your installation CD-ROM to upgrade your user count.

WARNING! TeleMagic allows you to install single user upgrades up to 5 users. If you have at least 5 users in your network, the user count must be a multiple of 5. If you have a network of between 2 and 4 users, and you have purchased a 5 or more user upgrade, you should install the appropriate number of single user upgrades to bring your network up to 5 users *before* registering the 5 (or more) user upgrade. If you do not, when you register, your network will be set back to a multiple of 5 and you will lose users.

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Data Synchronization Server

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If you have purchased two or more installations of TeleMagic, this will allow you to synchronize changes to data between them. This is useful, for example, if you have a remote office or a laptop that you take on the road. When you are ready to proceed, launch the Setup program from the CD-ROM and select Install/Upgrade Data Synchronization from the main TeleMagic Setup screen. Refer to the accompanying *Data Synchronization Server Manual* for more information and full installation and setup instructions.

TeleMagic's Data Synchronization Server allows you to establish a "master copy" of TeleMagic that will be your central site, then synchronize it with remote installations to work with the same data at each installation. Control of the synchronization process is maintained at the central site. You also have the option of installing your remote sites as Satellite Offices which, in turn, maintain their own remote sites. You may have one central site and any number of remote sites and Satellites. (Each site must be a registered copy of TeleMagic with a unique serial number.)

Continue...

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_____154.BMP<JumpId(readme.hlpİ½½README_Data_Synchronization_Server_Installation)<<1}
[Data Synchronization Server Installation](#)

Registration

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After installation or upgrade, you may use the full features of TeleMagic for 45 days without registering. After 45 days, you must register to access the program again. If you have purchased additional users, they must also be registered before you can use them. When you launch an unregistered installation of TeleMagic after installation, you will be asked if you would like to register. Alternatively, you can select **Register Users and Sites** from the **File** menu in TeleMagic. The Registration Help Wizard will launch and guide you through the registration process. If you need additional instructions during registration, press F1 to access on-line help.

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Evaluation Upgrade

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If you have an existing copy of TeleMagic Professional, TeleMagic for DOS, or TeleMagic Enterprise version 1.5 or 2.x and wish to install an evaluation of the V4 upgrade, you may do so following these instructions. This will upgrade your current installation for a 45 day complimentary trial period. At the end of the evaluation period, you can either purchase an upgrade or restore a backup of your previous version. If you choose to purchase the upgrade, the changes you have made to your data while evaluating the product will be retained. (If you install an evaluation that is not an upgrade then purchase an upgrade, you will have to upgrade the previous product to apply your upgrade serial number. Any changes made to your evaluation copy will be lost.)

Important Notice: After 45 days you will not be able to access the evaluation copy of TeleMagic without registering. If you decide not to register, you can restore your previous version of TeleMagic from backup. If you make any important changes to your records during the evaluation period, you should export them to a file that can be imported back into your restored backup installation should you decide not to upgrade. The export must be performed *before* the 45 days expires or you will not be able to access your records.

To Install the Evaluation Upgrade:

1. Insert the installation CD-ROM in your CD-ROM drive.
The setup program will launch.
or If the setup program does not automatically launch, select Start, Run from the taskbar to open the Run dialog box. In the Open field type D:\SETUP.EXE (where D:\ is the drive letter of your CD-ROM drive) and click OK.
The TeleMagic Setup screen will open.
2. Select the Install/Upgrade TeleMagic V4 for Windows or add items to an existing V4 installation button.
The Welcome screen will open.
3. Carefully review and follow the information on this screen then click Next>.
4. At the Install Type screen, select Upgrade an existing installation to V4 evaluation (No Serial Number) and click Next>.
The Installation Wizard will guide you through the rest of the upgrade process.
5. When you reach the Choose Destination Location screen, enter the path to the global TeleMagic directory.
When you complete the upgrade process, the installation specified in step 4 will be upgraded to V4 and will become unregistered.

Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_Installing_Enterprise_V4)<<1} [Installing Enterprise V4](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_Readme)<<1} [Readme](#)

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_New_and_Changed_Features_for_V4)<<1} [New and Changed Features for V4](#)

Upgrading from TeleMagic V1.0

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Users who are currently working in TeleMagic Enterprise V1.0 must upgrade to V1.5a before performing the upgrade to V4. This topic contains instructions for performing the upgrade.

To Upgrade a V1.0 Installation:

1. Before running the upgrade program, you must take the following precautions:
 - Read these instructions from start to finish, so that you know what to expect.
 - Check the number of fields on each level of each database to be upgraded using a Database Schema Report. (See the *Maintenance* chapter of the V1.0 *System Administrator Guide* for more on how to run this report.) You need to do this to make sure that every database can be converted to a V1.5a database. This is necessary because of a change in the way TeleMagic handles calculated fields in V1.5a, and because of the addition of a Start and Last Revision field to each level of each database. These changes mean that, per level, you may now have a maximum of 252 fields, minus the number of calculated fields on that level. If you had a level with over 252 fields in a V1.0 database—or with a high number of fields (e.g., 248) and several calculated fields (e.g., 6)—you will have to reorganize that database to reduce the number of fields before running the upgrade. If you do not check this now, the upgrade process will not be completed, and you will have to restore a back up copy of your version 1.0 program.
 - To avoid receiving "Incorrectly Formatted Alarm Date" errors when you start your newly upgraded TeleMagic for Windows program, make sure you close the Alarm application of the older version (if it is open.)
 - Make sure that your AUTOEXEC.BAT's SET TEMP= line points to a valid directory or you may experience some compression errors.
 - Make a note of the program group that you are currently using for your TeleMagic installation. Also note the global directory's location and name. This will be useful later.
2. If you are running a network version of TeleMagic 1.0, and various users in the system have previously created local databases (i.e., databases on their hard drives), you must take the measures described in [Relocating Databases and/or Activity Files](#) before continuing to ensure that every one of these local databases is upgraded.

Similarly, if you are running a network version of TeleMagic 1.0, various users may have activity files stored in different locations. Follow the steps described in [Relocating Databases and/or Activity Files](#) before continuing to ensure that every activity file is upgraded.

If these situations do not apply to you, proceed.

3. Exit TeleMagic and back up your current installation (including any copies of databases created in step 2) completely. Follow the guidelines laid out in the *Data Backup* section on page R-548 of the V1.0 *Master Reference Manual*.
4. Close any open application, especially the TeleMagic Alarms program.
5. Insert the installation CD-ROM in your CD-ROM drive.
6. The Setup program will automatically launch. Select **Exit** to close the Setup program. Select **Start, Run** from the Taskbar to open the Run dialog box.
7. In the Open: field, type **d:\util\15upg\disk1\setup**, where **d:** is the drive letter of your CD-ROM drive.
8. Click **OK**.

The upgrade program will initialize, and the first upgrade warning will appear.

9. If you have not yet backed up your installation, click **Cancel**, and do so now.
- or** If you have already made a dependable backup, click **OK**.

The second upgrade warning will appear.

10. Read this message box, and take special note of the warning concerning upgrade duration.
11. If you wish to proceed with the upgrade, click **OK**; however, if you have not allotted enough time for the upgrade, and need to exit now, click **Cancel**.

A third upgrade dialog box will open.

12. From the drop-down list box, choose the name of the Program Manager Group where the installation to be upgraded is located. (Do not simply accept the default program group that appears in this field unless this is actually the group where TeleMagic is installed.)
13. In the Please enter the destination drive and directory text box, enter the drive and directory where the installation (more specifically, the TM.EXE file) that you wish to upgrade is located. (Again, do not simply accept the default directory name that appears in this field.)

14. Click **OK**.
15. The upgrade process will begin.

A progress box will keep you informed of what is currently being upgraded.

When the upgrade program has finished with the first disk, you will be prompted for disk # 2.
16. Enter the path **d:\util\15upg\disk2**.
17. Click **OK**.

The upgrade will continue. As the program finishes with each disk, you will be prompted to insert the next one.
18. Point to the directory on the CD-ROM corresponding to the requested disk.

When all upgrade disk directories have been used, the first stage of the upgrade is complete. You will see several Assembling Files dialog boxes. Then, the following message will appear:

Stage One of the Upgrade is now complete.

Start Stage Two by double-clicking the Screen Conversion icon which has been added to your upgraded group, or by running CONVSCRN.EXE in the global directory.
19. Click **OK**.

You will be returned to the Program Manager or your desktop.
20. Locate the program group or folder you selected in step 10., above. In this group, there will be a new icon:
21. Double-click this icon.

A dialog box will prompt you for your new serial number.
22. Enter your new serial number, and click **OK**.

The second stage of the screen conversion program will start. This program will convert the V1.0 screen sets in each of your databases to version 1.5a.

WARNING! Under no circumstances should you try to abort the screen conversion program once it has begun. It takes a long time to convert the database templates associated with a TeleMagic for Windows installation, so you will need to be patient, particularly when the DBTYPES.* files are being converted.

A message will appear to let you know when the screen conversion program is complete.

23. Click **OK**.

The window will close, and you will be returned to your desktop.

24. You must open TeleMagic for Windows V1.5a at least once before upgrading to V4.
25. We recommend that you run a rebuild on all upgraded databases at this point.
26. When you are satisfied that the upgrade was successful, you can remove the temporary files that it created in each database/directory. All files with the extensions .TMD, .TMC and .TMF can be deleted.



Relocating Databases and/or Activity Files

This section is only applicable if the situation detailed in step 2., above, describes your setup.

Use the following instructions if you are running a network version of TeleMagic 1.0 and various users in the system have previously created local databases or have activity files stored in different locations. This will ensure that all files are upgraded.

To Copy Local Databases to the Network:

1. Get a list of locally-installed databases from each user.
 2. Go to an affected user's workstation and open TeleMagic.
 3. Select **File**, **Select Database** from the Main menu to access the Select Database dialog box.
 4. Highlight the description of one of the locally-installed databases, and click **Copy**.
 5. Enter a new description for the copied database, making sure that you note it carefully.
 6. Make sure the database will be copied to a network drive that is accessible to the upgrade program.
 7. Delete the original locally-installed database.
 8. Repeat steps 2 through 7 for all locally-installed databases.
 9. Exit TeleMagic.
 10. Go to the workstation of another affected user, and repeat the process, until all databases on all workstations have been copied to a network drive accessible to the upgrade program.
 11. If you do not need to transfer activity files, proceed with [step 3](#), above.
- or** Continue:

To Transfer Activity Files to the Global Directory:

1. Run a user preference report (**Reports, System Reports, User Preference Report**) to get a list of users who store their activity files in a location other than the global directory.
2. For each affected user, change the Location of Activity Files option in Activity Preferences back to the global directory.
3. Proceed with [step 3](#) , above.

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contdn01.BMP<JumpId(readme.hlp|½README_Running_the_Screen_Conversion_Utility)<<1}
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Upgrading from TeleMagic Professional

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The new Professional to Enterprise conversion is built into the installation program.

To Convert Professional and Install Enterprise V4:

1. Place the TeleMagic installation CD-ROM in your CD-ROM drive.
2. From the Taskbar, click Start and select Run... from the Start menu.

The Run dialog box will open.
3. In the Open:, type **d:setup.exe** (where **d** is the CD-ROM drive) and press ENTER.

The Setup program will load and prepare itself for the installation. After the internal preparation, the installation program will open to the TeleMagic Setup screen.
4. Click the Install/Upgrade TeleMagic V4 for Windows or add items to an existing V4 installation button.
5. The opening screen contains important information regarding the installation process. Carefully read the opening screen and follow any instructions given, then click Next >.
6. Click the Standard Installation/Upgrade (Serial Number Required) button.
7. Enter your name and company name, then click the Next > button.
8. Enter your serial number, then click the Next > button.
9. The Registration Confirmation dialog box will appear. Verify that the information you entered is correct, then click the Yes button.
10. Select Windows Professional as the platform from which you are upgrading, then click the Next > button.
11. Enter your TeleMagic Professional Global Directory. This is the drive and directory where Professional is installed, which is usually C:\TMPRO. If it is installed in a different directory click the Browse button to locate it.
12. Click Next >.
13. Enter the drive and directory where you would like to install TeleMagic Enterprise, or click the Browse button to find a new location.
14. Click Next >.

15. If the directory does not exist, verify that you would like the Setup program to create it for you by clicking Yes.
16. Select the size of the dictionary you would like to install for the spell checker, then click Next >.
17. Select the size of the help file you would like to install, then click Next >.
18. Enter the name of the Program Folder where Setup will create the TeleMagic icons.
19. Click Next >.
20. The Setup program will now display your current settings. Verify that these are correct, then click Next >.

The Setup program will install Enterprise in the directory you selected, adding databases to the new installation which correspond to your existing Professional databases.
21. Click Finish.

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Upgrade Issues

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Following are important issues if you are upgrading or updating a previous installation of TeleMagic Enterprise to V4. Be sure to carefully read and observe these issues. You should also refer to the [Readme](#) topic prior to any installation or upgrade.

Before Upgrading

Any e-mail will be overwritten. Prior to upgrading, print out all e-mail messages for all users.

If you have moved your installation of TeleMagic, run the DBUTIL Path Update utility prior to upgrading. If you are not certain whether the installation has been moved, Path Update should be run as a precaution.

While running an upgrade no user should be in the program. The installation program will check for users and indicate that they should exit prior to commencing the installation. However, if a user attempts to enter the program after the installation has commenced, he or she will receive a "Cannot write to a read only file" error. Users should not attempt to access the program while an installation is in progress.

If all users are out of TeleMagic and you receive an Unable to Update File message during upgrade, one of the TeleMagic files has been left open on the network. (This can occur if users exit Windows improperly.) See your system administrator to clear the file from the network. (Having all users log off the network will clear all open files.)

A SET TEMP = statement must exist in your AUTOEXEC.BAT file and must point to a valid directory prior to installation. To find out what your current TEMP directory setting is, go to the DOS prompt and type the word "set". If the SET TEMP = statement does not exist, or you need to re-direct the path to your TEMP directory, open your AUTOEXEC.BAT file and add a new SET TEMP = statement, or change the existing statement to point to a valid directory.

If you have set any of your TeleMagic system files to read-only, you should set them back to full access before upgrading to V4. If you do not, you will receive a message during the upgrade asking if you would like to overwrite the existing file. If this message occurs, you must select Yes for the upgrade to be complete. Selecting No will result in those files not getting upgraded.

Prior to performing an upgrade, the location of the activity files for all users must be set to the global directory. The location of the activity files should be verified for each user and, if necessary, moved to the global directory. (The files can be moved back to their usual path after the upgrade is complete.) Additionally, you should make sure the upgrade program can access all databases. Verify that no users are storing databases on a local directory, or a network directory to which the user performing the upgrade does not have network security access.

Users of TeleMagic for Windows V1.0 who want to upgrade to V4 must first upgrade to V1.5a. The V1.5a upgrade is included on the CD-ROM for this purpose. After you have upgraded to V1.5a, you must open the V1.5a installation once to complete the setup procedure; then close the V1.5a installation. After that you can upgrade from V1.5a directly to V4. For complete instructions on upgrading to V1.5a from V1.0, see the [Upgrading from TeleMagic V1](#) topic.

If you are upgrading from V1.5 or later (including installations of V1.5a that you have just upgraded from V1.0), you must have opened the installation of TeleMagic at least once before performing the V4 upgrade.

Do not attempt to upgrade the Beta test version of V4 to the final version of V4. TeleMagic Technical Support will not provide any assistance for this type of upgrade.

A full database rebuild will be performed as part of the upgrade process. Make sure you allot sufficient

time for the rebuild when performing the upgrade.

If you wish to upgrade using Data Synchronization Server, select the Send TeleMagic Upgrade check box for each remote site in Initialization Settings at the central site after the central installation has been upgraded. Make sure you unmark all other initialization settings, unless you intend to initialize those areas. (Performing an initialization with the other check boxes unmarked will upgrade TeleMagic without having any other affect on your data.) When you send the initialization packet, you should also send a copy of the file DSREMOTE.EXE for V4. This file is located in the path \UTIL\V4FILES\PROG on the CD-ROM. Copy this file to the global directory of your remote installations before processing the initialization packets.

DO NOT copy any files from your old installation of TeleMagic to the new V4 installation except documents or report files. Copying any other files from your old installation into V4 can cause serious damage to the installation. Contact TeleMagic Technical Support if you have any questions about this.

After Upgrade

Data Synchronization Server is not upgraded along with TeleMagic. If you have Data Synchronization Server installed, perform the DSS upgrade following the TeleMagic upgrade.

Upgrades of installations prior to V4 will be set to Unregistered. When you launch an unregistered installation of TeleMagic after an update, you will be asked if you would like to register. Alternatively, you can select **Register...** from the **File** menu in TeleMagic. The Registration Help Wizard will launch and guide you through the registration process. If you need additional instructions during registration, press F1 to access on-line help.

Registration of TeleMagic must be performed with TeleMagic open. If you have upgraded remote sites through Data Synchronization Server, make sure that users at the remote sites have the Key Cards with the serial numbers for each site. You should also make sure that each serial number is unique. If you attempt to synchronize a site with a serial number that is in use at another site, the second site will become invalid.

If you are using an add-on product that is accessed from the TeleMagic menu, those menu option(s) may need to be reinstalled. Contact your TeleMagic reseller for assistance.

If you have upgraded from an installation of TeleMagic prior to V4, you must upgrade any node installations you have installed. On each workstation, select **Workstation Setup** from the **File** menu in TeleMagic. Search on Workstation Setup in TeleMagic's on-line help for further instructions.

Issues for Upgrades from Installations Prior to V4

The DacEasy and TimeSlips links are not supported in the initial release of V4. When you upgrade, existing data will be retained but new information will not be synchronized with the other application.

Previously, pressing ALT+P on the keyboard would paste the current contact's address information to the clipboard. ALT+P will now open the Notepad dialog box. If you wish to paste contact information to the clipboard, select **Paste Contact Info to Clipboard** on the **Contact** menu, or press CTRL+P on your keyboard.

If you have changed the display order of your fields in the Browse window prior to upgrade, those changes will be lost. You must reset your browse display in V4.

Previously, when you opened TeleMagic from the program icon, the sample user TST would be automatically logged in. You were encouraged to add your own User ID and change the properties of the program icon to log you in automatically instead of TST. For new installations of V4, the TST user will no longer be automatically logged into TeleMagic; instead, the first user to log in after installation will have the opportunity of adding his or her own name and User ID. TeleMagic looks for the existence of no other users in an installation except the sample user TST to determine if this is a first time login. If you have been using the user TST as your User ID, and TST is the only user in your installation, you will be required to enter login information (for a user other than TST) the first time you

access V4. (You may continue to log in as TST if you desire as long as there is another user existing in TeleMagic.)

The file MERGE.EXE and its icon have been removed. The file TMFAX.EXE has been changed to TMAUTSRV.EXE and there is a new icon. If you had a MERGE.EXE or TMFAX.EXE icon on your desktop or program group, it will be removed on upgrade.

Upgraders need to open **Options, Preferences, Writing** preferences and enter the directory location where their documents will be stored in the Working Directory field.

Merge fields must follow the format FIELDNAME_LEVEL. Merge fields in any document that use the LEVEL_FIELDNAME format must be changed before they can be used with V4.

Cross-Level indexes are not supported in V4. When you upgrade, any cross-level indexes in your old installation will not be available for use. They will not be removed. These indexes will still appear on your index list when you open **Edit Indexes** from the **Contact Manager** menu. You will be able to edit these indexes to remove references to fields from all but one level.

The Screen Designer for V4 is fundamentally different from previous versions. In some cases fields on your screen may need to be adjusted slightly, in size and position, to present the same appearance as in your old installation.

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½convert_Upgrades)<<1} Upgrades
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_Upgrading_from_DOS_versions_prior_to_V12.3f
)<<1} Upgrading from DOS Versions prior to V12.3f
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
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from TeleMagic V1
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
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Synchronization Server
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
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Upgrading from DOS versions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(DOS
VersionsĩĴ½ ĩĴ½ ĩĴ½)<<1}

If your TeleMagic for DOS database has not been modified from the standard configuration, you should create an import format in TeleMagic V4 and import the database to the Coolest DOS Database. This database is not installed by default, but can be included in the V4 installation by choosing the Custom Installation Configuration. If you have already installed TeleMagic V4 and did not include this database, you can start the installation wizard and choose to add components to an existing installation.

If you have modified your DOS database from the standard configuration, you will need to create a new database in TeleMagic V4 which will accommodate your old database structure and create an import format for that database.

In either case filters, indexes, and list boxes will be included in the import.

Running the Screen Conversion Utility

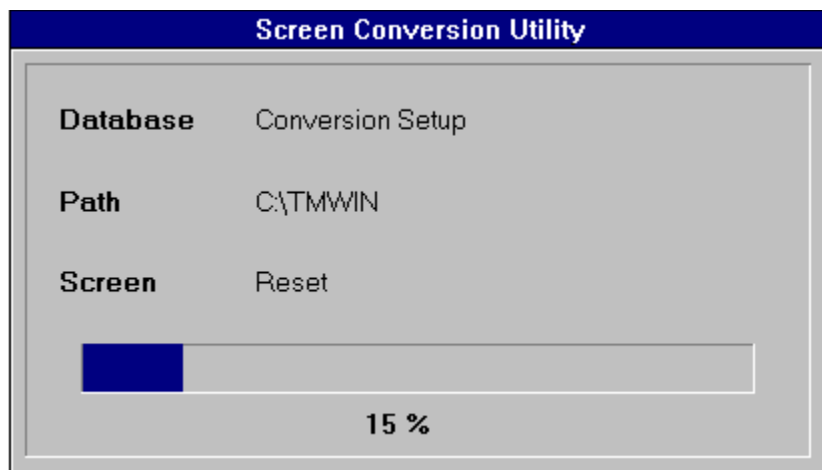
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Windows Versionsĩ½ ĩ½ ĩ½)<<1}

If you receive a message that you are trying to install a database which has not been upgraded, run the Screen Conversion Utility.

To Run the Screen Conversion Program Independently:

1. Make sure all users have exited the installation.
2. Exit TeleMagic.
3. Back up the entire installation.
4. From the taskbar select **Start, Run**.
5. In the Run dialog box, enter the path to the file CONVSCRN.EXE in your TeleMagic global directory.
6. Click **OK**.

The screen conversion program will start. This program will convert the views in each of your databases to version 4.0.

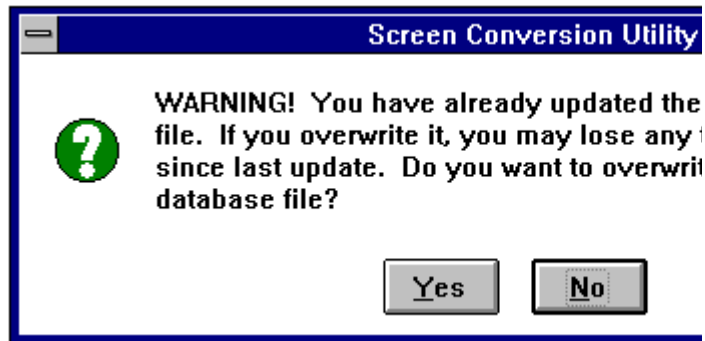


Screen Conversion Utility Progress Bar

WARNING! Under no circumstances should you try to abort the screen conversion program once it has begun. Even if it seems to be taking an unusually long amount of time to convert your screens, rest assured that the program has not stopped responding (even if Windows may indicate the program has stopped responding).

It takes a long time to convert the database templates associated with a TeleMagic for Windows installation, so you will need to be patient, particularly when the DBTYPES.* files are being converted.

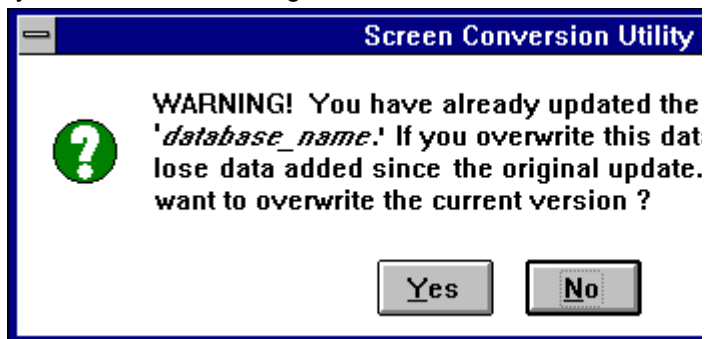
During this process, the following warning may appear:



7. If you receive the above warning, have already added new templates to your installation since upgrading TeleMagic and wish to keep those templates, click **No**.

Otherwise click **Yes**. The DBTYPES.* files will be updated.

8. If you receive this warning:



choose **Yes** if the changes made to the database mentioned can be discarded; **No** if you wish to preserve those changes.

Once the screen conversion program is complete, the window will close, and you will be returned to Windows Program Manager.

9. Open TeleMagic for Windows V4, and check that the upgraded databases are in working order.

```
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(readme.hlp|½convert_Registration)<<1}
```

The TeleMagic Help System

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Generalĩ½ ĩ½ ĩ½)<<1}

Getting more information

TeleMagic's help system has been designed to provide you with all of the information you need without excessive clutter. To accomplish this, almost all procedures have amplifying information attached to a set of graphical controls, and offer traditional help system jumps and hotspots.

Access amplifying information wherever you see the following icons:



This is a Note icon. Click on it to see a note.



This is a Hint icon. Click on it to see a hint.

Sometimes there will be a General Note button in the upper section of the topic:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(readme.hlp>thirdĩ½ Readmex_General_Note_for_Using_This_Help_System)<<1} This is the General Note button. Click on it for general notes.

Navigating the Help System

Moving from topic to topic in this Help System can be accomplished several ways in addition to using the standard **Help Topics** and **Back** buttons. The top of each topic will always contain this button:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<JumpId(readme.hlpĩ½ Readmex_Related_Topics_for_Using_This_Help_System)<<1} This is the Related Topics button. Click on it to see related topics.

Within the body of the topic there may be hotspots , which will be green and underlined. Click on the hotspot to open the topic.

There may also be popup hotspots . You can tell a popup hotspot from a regular hotspot by the dotted underline. Click on the popup hotspot for more information.

At the end of each topic will be one of two kinds of buttons:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(readme.hlpĩ½ Readmex_Continue_Topic_for_Using_This_Help_System)<<1}

Click on this button to proceed to one pre-selected follow-up topic. This button is used in cases where there is only one closely related topic, or there are no closely related topics. In the latter case, the **Continue** button will take you to a general topic from which you can search for other information.

Or

Choose one of the following topics:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(readme.hlpĩ½ Readmex_Follow_on_Topic_1)<<1} Follow-on Topic #1
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(readme.hlp;½Readmex_Follow_on_Topic_2)<<1} [Follow-on Topic #2](#)

Continue to Topic buttons, immediately above, are always associated with a jump hotspot. You can click on either the button or the hotspot to proceed to the indicated topic.

Installing Enterprise V4

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Installation\½
½ ½ ½)<1}

Please read the following installation issues before installing TeleMagic V4.

Installation/Upgrade from Disk

If you do not have a CD-ROM drive, follow the instructions found in the file INSTALL.WRI on Disk 1 of your installation disks when installing from disk.

Installation Using the CD-ROM

The TeleMagic installation CD-ROM includes options for installing and upgrading TeleMagic Enterprise V4, Installing Data Synchronization Server, or installing the CTI Link. Before proceeding with installation or upgrade, review the information in the appropriate heading(s) below.

To Launch the Setup Program:

1. Start up Microsoft Windows (if it is not running already).
2. Insert the installation CD-ROM in your CD-ROM drive.
The setup program will launch.
- or** If the setup program does not automatically launch, select **Start, Run** from the taskbar to open the Run dialog box. In the Open field type D:\SETUP.EXE (where D:\ is the drive letter of your CD-ROM drive) and click **OK**.
The TeleMagic Setup screen will open. The setup program consists of a series of dialog boxes that will walk you through installation, step-by-step.
3. Follow the on-screen installation instructions to complete installation.

When you have completed installation, you will be required to register your software. Refer to the [Registration](#) topic for more information.

First Time Installations:

To perform first time installation, select Install/Upgrade TeleMagic V4 for Windows or add items to an existing V4 installation at the main TeleMagic Setup screen. Before installing, however, you should refer to the *System Administrator Guide* that accompanied your installation CD-ROM. This guide gives you important information on system requirements and necessary network configuration (for multi-user installations). It also gives helpful instructions on setting up and optimizing TeleMagic for your use. (Refer to the [Installing TeleMagic on a Windows 95/98 Network](#) topic for special instructions regarding installation on a Windows 95 or Windows 98 network.)

Upgrade Installations:

If you have any version of TeleMagic Enterprise prior to V4, you will need to perform an upgrade. Before upgrading, it is very important that you review the upgrade issues. You will find important issues in the [Upgrade Issues](#) topic. If you are upgrading from Enterprise V1.0, you should also refer to the [Upgrading from TeleMagic V1.0](#) topic. Upgrading from TeleMagic for DOS involves creating an import format and importing your TeleMagic for DOS database(s). See [Upgrading](#)

[from DOS versions](#) for more information.

To avoid potential errors, review this information before proceeding with the upgrade. When you are ready to proceed, launch the Setup program from the CD-ROM and select Install/Upgrade TeleMagic V4 for Windows or add items to an existing V4 installation from the main TeleMagic Setup screen.

Upgrading TeleMagic Professional to TeleMagic Enterprise

If you are upgrading from TeleMagic Professional to TeleMagic Enterprise, refer to the [Upgrading from TeleMagic Professional](#) topic for instructions.

Upgrading Your User Count

If you have purchased additional users, they must be registered before they will be available in TeleMagic. You will not need your installation CD-ROM to upgrade your user count. See the [Registration](#) topic for instructions.

WARNING! TeleMagic allows you to install single user upgrades up to 5 users. If you have at least 5 users in your network, the user count must be a multiple of 5. If you have a network of between 2 and 4 users, and you have purchased a 5 or more user upgrade, you should install the appropriate number of single user upgrades to bring your network up to 5 users *before* registering the 5 (or more) user upgrade. If you do not, when you register, your network will be set back to a multiple of 5 and you will lose users.

Installing/Upgrading Data Synchronization Server

If you have purchased two or more installations of TeleMagic, this will allow you to synchronize changes to data between them. This is useful, for example, if you have a remote office or a laptop that you take on the road. When you are ready to proceed, launch the Setup program from the CD-ROM and select Install/Upgrade Data Synchronization from the main TeleMagic Setup screen. For general instructions on installing Data Synchronization Server, see the [Data Synchronization Server Installation](#) topic. Refer to the accompanying *Data Synchronization Server Manual* for more information and full installation and setup instructions.

Continue...

```
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_Data_Synchronization_Server_Installation)<<1}
Data Synchronization Server Installation
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½convert_Evaluation_Upgrade)<<1} Evaluation Upgrade
```


Data Synchronization Server Installation

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Installation; ½
½ }<<1}

Installing/Upgrading Data Synchronization Server

TeleMagic's Data Synchronization Server allows you to establish a "master copy" of TeleMagic that will be your central site, then synchronize it with remote installations to work with the same data at each installation. Control of the synchronization process is maintained at the central site. You also have the option of installing your remote sites as Satellite Offices which, in turn, maintain their own remote sites. You may have one central site and any number of remote sites and Satellites. (Each site must be a registered copy of TeleMagic with a unique serial number.)

To Launch the Setup Program:

WARNING! All users must be out of TeleMagic before installing or upgrading Data Synchronization.

1. Install or upgrade to TeleMagic V4 following the instructions [Installing Enterprise V4](#) topic, if you have not already.

2. Insert the TeleMagic CD-ROM in your CD-ROM drive.
or If you are installing from disk, insert the Data Synchronization installation/upgrade disk in your disk drive.

The setup program will launch. Skip to step [4](#) .

- or** If you are installing from disk, or if you are installing from CD and the setup program does not automatically launch, select **Start, Run** from the taskbar to open the Run dialog box.

3. In the Open: field, type D:\SETUP.EXE (where D:\ is the drive letter of your CD-ROM or the disk drive) and click **OK**.

If you are installing from disk, skip to step [6](#) .

The TeleMagic Setup screen will open.

4. Select the second button: Install/Upgrade TeleMagic Data Synchronization Server/Remote.

The Welcoming screen will open.

5. Carefully read and follow the information on this screen. When you are ready to proceed, click **Next>**.

The Select Data Synchronization Type screen will open.



6. Select TeleMagic DSS Remote for a remote site, TeleMagic DSS Satellite for a Satellite Office, or TeleMagic DSS Central for your central site and click **Next>**. (If this is an upgrade, make sure you select the option that is already in use on [your](#) installation.)

- or** Select the Convert Existing Remote To Satellite radio

button if you are changing an existing remote site to a satellite site and click **Next>**.

7. Follow the on-screen installation instructions for the remaining screens.

Continue...

```
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½convert_Evaluation_Upgrade)<<1} Evaluation Upgrade
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_Installing_Enterprise_V4)<<1} Installing
TeleMagic V4
```

New and Changed Features for V4

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(General'i½ i½ i½)<<1}

Activity Manager Interface

The Activity Manager window can be configured with up to four frames, each containing a different view. There are five views available: Day, Week, Month, To-Do, and Detail. When the user clicks on a frame, it becomes active. When a change is made, it will be made to the active frame. If more than one view is displayed, they can be synchronized to show the same time frame. When frames are synchronized, changes will be immediately displayed in all views. Multiple copies of the same view can be displayed at the same time. For example, two Week views can be displayed side-by-side. If this configuration is selected, and views are not synchronized, two different weeks can be compared directly. Users can drag and drop items between the views.

Deleting and Editing Activities from Time Slots with Multiple Activities

A pop-up menu will open when the user clicks either the Delete or Edit button and the current time slot contains multiple activities. This works with any view that may contain multiple activities, including Month view.

Activity and To-Do Dialog Boxes

The dialog boxes for creating and editing activities and To-Dos have been improved. The new dialog boxes organize the available options on separate pages which are accessed by clicking their respective tabs. The Activity dialog box includes a page for setting general parameters for the activity such as the name, time, duration, and so forth. The remaining pages are optional. There are pages for linking the activity to contacts, adding comments, assigning the activity to other users, assigning resources to the activity, checking the availability of assigned users and resources, and establishing the activity as a recurring activity.

The To-Do dialog box is similar, but only provides a general page, link page, comment page, and assignment page.

Availability Checking

Availability checking is now accessible directly from the Activity and To-Do dialog boxes. Availability checking can now be used when setting an activity for a single user.

Hide Activities

There is now an option to hide activities. When an activity is hidden, it is only visible on the browse view. This option is marked by default for TeleMagic-generated activities of the following types: letter, mail merge, e-mail, and fax.

Template Lengths

When the field length is changed, the template will be resized automatically to accommodate.

New Field Types

Several new, communications-related field types have been added. Each of the new field types has an associated icon which, when clicked, will launch the appropriate application. For example, the Web Address icon, when clicked, will launch the browser to the URL indicated in the field. The following types have been added: Wireless Messaging, Web Address, E-mail Address, FTP Address, and Newsgroup.

Word Processor Selection

Word processor selection has been improved. Supported word processors are presented on a list. Simply mark the checkbox for each desired word processor. Command lines can be automatically generated for OLE word processors.

Unique Queue Names

To prevent confusion, duplicate queue names are not allowed.

Processing Pause Type

Each queue can be set to pause between each item, or to pause only when idle.

Queued E-mail

Queuing e-mail is supported. Single e-mails can be queued as well as filtered e-mail. E-mail can be given hold times and will not be sent until the specified time, regardless of its position in the queue. The Automation Server will perform any merge operations on merge documents attached to queued e-mail.

Modem Selection

Modem selection and configuration has been improved. The Modem Configuration dialog box is now arranged in pages. There are separate pages for Fax, Wireless Messaging, E-mail, and DSS E-mail. Available modems are listed on each page, where relevant options are available for configuring each modem.

RTF Controls

RTF (Rich Text Formatting) controls are now included in Branch Scripting to improve the readability and presentation of your scripts.

User Interface

The user interface has been redesigned. The user can display either the tree view of the script, which indicates the history of the call, or any fields which have been associated with the current level of the script. The desired view is selected using tabs. The amount of space allocated to the text and Branch/Fields areas is adjustable by the user with sizing arrows.

Recovering Orphan Records

To prevent the creation of orphan records, level 2 and level 3 records cannot be recovered unless their parent is available.

Fully Customizable Toolbars

The Toolbar has been enhanced. The Control Bar has been replaced with a toolbar, and a third toolbar can be added. All toolbars are dockable with docking ports on each side of the Contact Manager

screen. They can also "float" anywhere on the screen. There are separate tools available for the original toolbar (now called the System Toolbar) and the other two toolbars (the Primary and Secondary Toolbars, respectively).

The following tools have been added for the System Toolbar. These are in addition to all tools which were available for the toolbar in the previous version:

| | |
|--------------------------------|---|
| Launch TeleMagic Internet Mail | Opens Internet Mail |
| Add a Tack-It | Opens a new Tack-It |
| Last Record Added | Opens the newest record in the current database |
| Message Taker | Opens the Message Taker |

The Control Bar was replaced with the Contact Manager Toolbars. Only the Primary Contact Manager Toolbar is pre-defined. Both Contact Manager Toolbars use the same set of tools. In addition those previously found on the Control Bar, the following controls have been added:

| | |
|---------------------------------------|---|
| Paste Contact Info to Clipboard - | Places current contact information on the Windows clipboard |
| Quick Add | Opens a new record on the current level |
| View Linked TeleMagic E-mail Messages | Opens a list of linked TeleMagic e-mail messages |
| Sales Forecasting Rollup | Displays Sales Forecasting information linked to the current record |
| Search for the currently typed text | Searches for the text entered in the associated text field |

The following buttons have been replaced as indicated:

Day, Week, and Month buttons have been replaced with View Your Schedule

Notepad Only Records has been replaced with Notebook

The appearance of the following buttons have changed:

Security
Spell Check
Dial
Set Recall
Calculator
Contact Manager
Exit
Pending Activities
Page Up
Page Down

All tools can be identified by their ToolTips.

ToolTips

To simplify identifying them, all Contact Manager tools have ToolTips. To see the ToolTip for any tool, momentarily rest your cursor over the tool and the name of the tool will appear. There are two exceptions to this: the ToolTips for the Filter and Index drop-down lists indicate the current filter and index, respectively.

Database Usage Dialog Box

A window has been added. This window is intended to hold notes pertaining to the databases function, design philosophy, or any other relevant information. Access this dialog box for editing by selecting Change Database from the File menu and clicking Usage. This information can also be read, but not

edited, by selecting Contact Manager, Contact Utilities, Database Usage, or by opening the Database page of the System Information dialog box.

Linked Documents Dialog Box

The Linked Documents dialog box has been improved. The functions of this dialog box are now divided between two pages, the Linked Documents page and the Document Management page. The Linked documents page lists all of the linked documents and provides access to the History dialog box and the Word Processing feature, while the Document Management page provides access to documents that have been printed or faxed for editing.

Deleting Activities

Linked activities can be completed or deleted from the Activities List.

Stamping the Notepad

The Add Notes and Notepad dialog boxes now have Stamp buttons. Clicking the Stamp button will add time, date, and user ID information to the Notepad of the current record.

Add Note Dialog Box

There is now a checkbox which allows the user to choose a split-screen view on the Add Note dialog box. When the split-screen is selected, the upper-half of the text field will become a read-only view of the existing contents of the notepad.

Custom Reports

The interface for the Report Generator has changed. Improvements include floating toolbars, simplified dialog boxes, and more direct control over what data is used in the report.

Database Utility

Template Maker is now part of the DBUTIL suite of utilities.

Rebuild Dialog Box

Radio buttons are now used to determine which transactions should be deleted.

Interface

The interface for Central and Satellite sites is now menu-based. This provides more direct access to all functions.

Packet Transfer Options

Packets can be transferred three ways: manually, via FTP, or via e-mail. When transferring by e-mail, the option is available to use the Automation Server. When using e-mail to transfer packets, the packets will automatically be transferred to the site's Inbox for processing. The Automation Server can be set to send, receive, or send and receive packets.

Options Dialog Box

The Options dialog box has been changed to a tab format. Options are now divided among five pages: Server, Security, Global File Sets, Scripting, and Miscellaneous.

Site Preferences Dialog Box

The Site Preferences dialog box has been changed to a tab format. Options are divided among five pages: Site Preferences, Initialization, Initialization Opts, File Sets, and Transaction. Initialization Security has been added to the Initialization Opts page, and has been changed to radio buttons to prevent ambiguity.

Transport Options at the Satellite and Remote Sites

Transport options can be set at the Satellite and Remote sites. When a packet is received, the transport option will be changed to that specified at the Central site.

Support for Data Synchronization Server

Packets can now be sent as attachments to e-mail messages. DSS packets will be delivered to the DSS Inbox.

Queue to Automation Server

Messages can be sent to any available Automation Server queue. When a message is sent to the queue, it will be moved to the Sent folder with the status of "Queued Server". The status will change to "Sent" when the Automation Server informs TeleMagic Internet Mail that the message was sent.

Queue Message Locally

When a message is queued locally, it is placed in the Outbox with the status "Queued". It will remain in the Outbox until the user processes the Outbox. When the Outbox is processed, any messages queued there will be sent to their recipients, and sent to the Sent folder with the status of "Sent".

Send Immediately

When a message is sent immediately, it will be sent to the recipient via the method chosen. It will be sent using Dial Up Networking (DUN), or the proxy server. In either case, the message will be transferred to the Sent folder with a status of "Sent".

Place On Hold

When a message is placed On Hold, it is transferred to the On Hold folder with a "Pending" status.

Receiving Messages

The interval between checking for messages can be set by the user. Maximum size of incoming messages can be specified. The user can choose whether or not to be notified. E-mail notification can be visual, audible, or both.

Stamping the Notepad

There is an option to stamp the Notepad when sending linked e-mail to contacts. When selected this will stamp the Notepad with the text of the message as well as the file names of any attachments.

Encrypted Storage

There is an option to store e-mail messages encrypted. This will prevent messages from being read from outside of TeleMagic.

E-mail Preferences - General

The General preferences page includes settings which allow the user to determine when messages are permanently deleted, how to handle replies, whether to use Rich Text by default, whether to use encryption, the mailbox name and password, whether TeleMagic Internet Mail should be the default mail client, and where to store attachments.

E-mail Preferences - Display

Display preferences determine which sections of the main TeleMagic Internet Mail screen will be visible. There are four sections which are optional: the Toolbar, the Status bar, the Folders section, and the Message Body section. The Message Information section must be displayed. Also on this page, the user can define what font effects to use when displaying messages. For example, new messages can be indicated in bold face and deleted messages can be indicated in strike-through.

E-mail Preferences - Servers

All established e-mail accounts for the user are indicated on this page. Existing accounts can be modified, and new ones created, from this page. This page is also used to select whether to log on to MAPI.

E-mail Preferences - Delivery

Options on this page determine how often to check for new messages, the maximum acceptable size for any message, how to notify the user when new messages are received.

E-mail Preferences - Spelling

This page offers various options related to spell checking e-mail messages. TeleMagic Internet Mail can automatically check all messages before they are sent, and can be set to ignore unrecognized words based on a number of factors.

E-mail Preferences - TeleMagic

To use certain TeleMagic Internet Mail functions, the user must be logged into TeleMagic. There are options on this page which allow the user to determine when to log onto TeleMagic, where the TeleMagic installation is located, whether to link incoming mail to contacts, where to search for contacts based on e-mail addresses, whether to stamp the Notepad, and whether to create activities based on e-mail messages.

E-mail Preferences - Automation Server

All existing Automation Server accounts are listed on this page. New accounts can be added, and existing ones created, from this page. The user can also choose whether to stamp the notepad of the record when a message is sent, whether to create an activity when the message is sent, whether to be notified in the event of failure, and whether to fail messages due to invalid fields. The Automation Server can be used to send, receive, or both send and receive e-mail.

E-mail Preferences - Filters

TeleMagic Internet Mail can use filters to determine how to handle incoming messages based on the contents of certain fields. All such filters which have been created are listed on this page. Existing filters can be modified, and new filters created, from this page.

E-mail Preferences - Addresses

This page provides several options for how names should be displayed in the Address Book.

Select Recipients

The TeleMagic Internet Mail Select Recipients dialog box contains five pages:

TeleMagic Users Consists of all TeleMagic users at the installation who have entered an e-mail address in TeleMagic Preferences.

Internet A personal address book which can contain e-mail addresses for anyone the user may need to contact. Also holds notes, and address and phone information. Entries in this book can be organized into groups.

MAPI The address book established for the user's MAPI mail program. This is only available if the user is logged onto MAPI.

Contacts This page allows the user to address the message to the current contact, or search any accessible database for the addressee.

Contacts with Merge Option This page allows the user to address the message to the current contact, search any accessible database for the addressee, or send the message to a filter. When using this page, merge documents can be sent to contacts using the addressee's information in the merge fields.

E-mail Status

Each message can be assigned one of five statuses: New, Opened, Sent, Queued Local, or Queued Server.

Link Incoming Mail

The user can choose to have TeleMagic Internet Mail search available databases for matching e-mail addresses and link the mail to that contact.

Password Protection

E-mail messages can be password protected. When received, the message will only open when the recipient's TeleMagic password is presented. If the recipient does not have a password, the message will open automatically. This feature is only available for messages to TeleMagic users.

Automatic Spell Check

There is an option to automatically spell check all messages before sending them.

E-mail Key Field

There is now an E-mail Key Field. This allows e-mail messages to be sent to the current contact, or contacts in a filter.

Include Original Message in Reply

There is an option to include the text of the original message as part of any reply to that message.

Paste Contact Information

Contact information can be stamped into the text of a message if the message is linked.

Linking Messages to Contacts

Messages can be linked to contacts. When a message is linked to a contact, the information on that contact can be displayed from TeleMagic Internet Mail. The user can also open the Contact Manager to the linked contact from TeleMagic Internet Mail and open the e-mail from the e-mail rollout list in the Contact Manager.

Attachments

TeleMagic Internet Mail supports two kinds of attachments, standard and merge. Standard attachment can be any file. Merge attachments can be any merge document. When sending a merge attachment, the merge is performed as the document is being sent. E-mail with merge documents attached must be sent using the Automation Server.

MAPI Support

TeleMagic Internet Mail allows the user to interface with their MAPI mail program. TeleMagic Internet Mail messages can use addresses in the MAPI address book.

Mail Folders

There are six pre-defined folders in TeleMagic Internet Mail: Inbox, Outbox, Deleted, Sent, On Hold, and Undeliverable. The user can define additional folders or subfolders for any of these folders.

Addressing Messages

The title of each address line (To, CC, and BCC) are buttons. When one of these buttons are clicked, the Select Recipients dialog box is opened from which the user can select the addressee. Alternately, the user can enter the address directly in the address field. Internet addresses use the standard protocol, and TeleMagic users use the user name and ID.

Support for Standard Mail Protocols

TeleMagic Internet Mail supports POP3 and SMTP for local e-mail.

Multiple Accounts

TeleMagic Internet Mail allows users to create as many accounts as they may require. This can be useful if the user has several Internet accounts. Once established, mail can be retrieved from any account by selecting the appropriate account from a menu.

Independent Operation

TeleMagic Internet Mail can operate independently of TeleMagic Enterprise. When TeleMagic Internet Mail is launched externally to TeleMagic Enterprise, a login is required. When launched from Enterprise, no login is required.

NPDMERGE

Combines the contents of two memo fields, sorted by date.

Fax

The Fax page includes information concerning who is sending the fax, who is receiving it, the receiving fax number, the subject, and the path to the cover sheet (if any). Also, several options are set on this page, including notification, activity creation, stamp options, and which queue to use.

Docs

The Docs page allows the user to specify up to ten documents to accompany the fax.

Options

The Options page contains controls which allow the user to delay transmission of the fax to a later date and time, specify notification options, specify stamping options, specify merge options, and specify the filter to be used (if any).

External Docs

Externally produced documents can be captured for faxing from this page. Captured documents and reports, both Standard and Custom, can be selected for transmission with the fax.

Comments

Comments to be included on the cover page of the fax can be entered on this page.

Goto

The Goto feature no longer requires an index to be selected. If a multiple index is available, it will be used. When a multiple index is used, the current level will be searched first, followed by the parent level.

Wizard Interface

A wizard is used to create new import formats. After a format is created, it can be edited using a dialog box containing pages which correspond to the steps performed in the wizard.

Field Assignment

Field assignment is now accomplished through the use of a two-sided list. On the left side of the list, source fields are displayed. This column can be toggled between field name and prompt. The right side of the list is initially blank. When the user clicks on one of the spaces, a drop-down list will open containing all available fields in the target database. When one of the fields is available, it will be entered into the selected space on the list. This column toggles between field name and sample data.

An expression can be created which will allow the user to specify what information from the source database should be included in the target field. Parts of fields, multiple fields, variables, and literals can be used in the expression.

SDF File Parser

The Standard Data Format file parser now consists of a ruler across the top of the window. Data is listed across the window with rows for sample records. Clicking on the window will insert a field break. Lines can be dragged to new locations, or removed as required. There is an indication of field length.

Express Import Format

When importing a flat (one-level) file, the Express Import Format can be used. This format requires only the minimum information from the user, and accepts all defaults. The Express format runs significantly faster than other formats.

Fax

The Fax page includes information concerning who is sending the fax, who is receiving it, the receiving fax number, the subject, and the path to the cover sheet (if any). Also, several options are set on this page, including notification, activity creation, stamp options, and which queue to use.

Validation of Incoming Data

If your target database has fields which are validated, based on list boxes or expressions, Import can be set to ignore data that does not meet the validation requirement and import it anyway, or reject this data. In the event that the data should be rejected, either the entire record can be rejected, or only the fields containing the data. Rejected data is stored in a rejected record file.

Field Calculations

Import can perform field calculations during the import. This option will increase the time required for the import, but will eliminate the need to perform the calculations after the import.

Updating Indexes

Indexes can be rebuilt either during the import or after the import, during rebuild. This option can noticeably reduce the time required for large imports.

Duplicate Records

There are now three options available when a record being imported is a duplicate. The record can be added as a new record, merged with the existing record, or rejected. The check for whether a record is a duplicate is based on existing duplicate record check indexes, an individual index, or an expression.

Notepad Stamp

The Notepads of imported records can be stamped with the time and date of the import, the user ID of the person performing the import, and any text the user wishes to include. For example, the phrase "Imported from Jennifer Cram's laptop" could be stamped to help identify the source of the record.

Field Rules

Field rules can be used to filter data based on the selected criterion.

Import Progress Indicator

The Import Progress Indicator now includes information concerning how many records have been imported, how many records were merged, as well as other pertinent statistical data. The update rate of this indicator can be set in the Import definition. The speed of the import can be improved by increasing the amount of time between updates.

Supported Import Formats

In addition to TeleMagic and dBase III, the following formats are supported for import:

| | |
|-------------------------------|------------------------|
| Standard (System) Data Format | SDF |
| Comma Delimited Format | DLM |
| Tab Delimited Format | (no default extension) |
| User Defined Delimited | UDD |
| Framework II | DIF |

| | |
|-----------------------------------|-----|
| Lotus 1-2-3® version 2.x | WK1 |
| Lotus 1-2-3® version 1a | WKS |
| Lotus Symphony® versions 1.1, 1.2 | WR1 |
| Lotus Symphony® version 1.0 | WRK |
| Microsoft Excel® version 5.0 | XL5 |
| Microsoft Excel® 97 | XLS |
| Microsoft Multiplan® version 4.01 | MOD |
| Paradox V3.5 | DB |
| Paradox V4.0 | DB |
| Rapid File V1.2 | PRO |

Cross Level Indexes

Cross level indexes are no longer allowed. When upgrading an installation that includes cross level indexes, those indexes will be removed. The rebuild report will indicate any indexes which were removed.

Key Fields

The Key Fields list now consists of two parts. The left side of the list is a scrolling list of the names of the key fields. To assign a field to a key field, click on the space to the right of the key field. A drop-down list containing eligible fields will open. Select the desired field and the name of the field will be inserted to the space associated with the selected key field.

Login

There is a password confirmation field on the first-time login dialog box.

Message Taker

The TeleMagic Message Taker is based on the "While you were out" note pads. TeleMagic users are selected from a drop-down list, and the date and time of the message are entered automatically. There are fields for the name and phone number of the caller, who they represent, the subject of the message, and the message text. There are checkboxes for the expected response (Please Call Back, Wants to See You, etc.). Messages can be linked and password protected. There are page and notify options.

Notebook

Notepad Only records have been replaced by the Notebook. The Notebook has two index options available, Note ID and Description. Notebook records can be personal or database. The Notebook can use any available font and includes RTF controls.

Pending Activities List

You can leave the Pending Activities List open while working in other areas of TeleMagic. If you close the Pending Activities List and reopen it, it will start at the first activity rather than returning to the last activity selected.

E-mail Address

Users can have their e-mail address included along with other user information. This address will be used by TeleMagic Internet Mail.

Preferences Dialog Box

The Preferences dialog box now uses a page format. All preference sets are represented on the fourteen pages of this dialog box. All preference sets previously included in the Preferences dialog box have been retained except E-mail. E-mail preferences have been moved to TeleMagic Internet Mail. The tab for any preference sets not available to the current user are grayed out.

The preference category of the current page (user, database, or global) is indicated in the title bar of the dialog box. For example, if the currently open preference set is Activity (and Jennifer Cram is the current user), the title bar will say "Activity Preferences for Jennifer Cram". If Toolbar preferences are set to Database (under Directory Preferences), Documentation is the current database, and Toolbar is the open page, the title bar will say "Toolbar Preferences for Documentation", and so forth.

Century Rollover

Century Rollover is included under System Preferences. Enter a number in this field and that will become the date used as a cut off for the twentieth century. For example, if 95 is set as the Century Rollover, any year entered as a two-digit number that is equal to or lower than 95 will be recorded as being in the twenty-first century (20xx). Any year entered as a two digit number that is greater than 95 will be recorded as twentieth century. In this example, if the user entered "95", the year would be recorded as "1995", while entering "94" would be recorded as "2094".

Update/Upgrade Report

There is an option to review and print the Upgrade report after the Update or Upgrade rebuild is performed. The report is viewed in WordPad and can be printed from there.

Rebuild Options

Data Synchronization Server and Automation Server tables can now be rebuilt as part of the TeleMagic Enterprise rebuild. When rebuilding these tables from Enterprise, defaults will be used for the rebuild options.

User List

A new report has been added to the System Reports, User List. This is a compact list of users for the current installation.

Sales Forecasting Dialog Box

The Sales Forecasting dialog box has been changed to a tab format. There are five pages: Forecast, Contact Link, Sales Progress, Closed Sale, and Reports. Some of the new pages entirely replace dialog boxes which were previously accessed from buttons. Others divide functions which had been located entirely on the main Sales Forecasting dialog box.

Paste Contact Info

There is now a Paste Contact Info button for the Sales Forecasting memo field.

Rollup Lists

There are two new rollup lists, E-mail and Sales. The E-mail rollup is similar to the Document rollup but lists linked e-mail messages. The Sales rollup displays linked Sales Forecasting information. The Rollup List has been renamed Contact List. There is now only one tool for all rollup lists. When this tool is active and placement is set for the new field, a selection box will open from which the user selects

the type of rollup list they want to add.

Overriding Checkbox Prompts

There is now a prompt field in Field Properties for checkboxes. This entry will override the prompt entered when the checkbox field was defined.

Spell Checker

The Spell Checker has been replaced. Changes to the custom dictionary in the new Spell Checker are all user-specific. The new Spell Checker has a different interface and an improved missed-word suggestion function.

Tack-Its

Tack-Its are small notes that can be placed anywhere on the Contact Manager screen. Tack-Its can be attached to specific records, one particular database, or be global. Tack-Its can be visible to all users who have access to the database they are attached to, or only to the author. Tack-Its come in a variety of colors, can be resized, and can be spell checked. There is no specific limit to how many Tack-Its can be created. Right-clicking on a Tack-It opens a floating menu which contains most available options.

Bulletin Board

The Bulletin Board contains messages written on Tack-Its. (See the Tack-Its topic for more information on Tack-Its.) Tack-Its that appear on the Bulletin Board are similar to other Tack-Its in most respects, except that anyone with access to the Bulletin Board will be able to view these notes. Right-Clicking on the Bulletin Board opens a floating menu which contains most available options.

Toolbar Configuration

The Toolbar Configuration screen is now a mover dialog. The toolbar being edited is selected from a drop-down list, the desired tool is selected from a scrolling list, and the tool is added to the toolbar by clicking Add.

User Groups

Member lists for User Groups are now in alphabetical order.

Dockable Control Bar

The Screen Designer Control Bar is now dockable. It will dock to any of the four sides of the screen, or can “float” anywhere on the design field.

Spell Checker

The Spell Checker has been replaced. Changes to the custom dictionary in the new Spell Checker are all user-specific. The new Spell Checker has a different interface and an improved missed-word suggestion function.

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The Toolbar Configuration screen is now a mover dialog. The toolbar being edited is selected from a drop-down list, the desired tool is selected from a scrolling list, and the tool is added to the toolbar by clicking Add.

User Groups

Member lists for User Groups are now in alphabetical order.

User Setup

When adding a new user, or changing an existing user, the information is now entered on a dialog box. A field has been added for the user's e-mail address.

Wireless Messaging

Toll-free "800" numbers are no longer required for paging.

Document Organization

Word processor documents are now organized into a tree view. There are separate folders for documents and templates. Each of these folders has subfolders for user, database, and global documents.

OLE Word Processors

The path and file name required to access certain word processors can now be determined automatically.

Workstation Setup

All files are copied to a node when it is first setup, rather than when it is first launched. There is a check to verify that the files were copied the first time the node is launched, and they are copied if necessary.

TXTMERGE

Merges and sorts the contents of two text expressions, and eliminates any duplicates.

GETDISTANCE

Returns the distance between the center points of two ZIP codes. Requires the Zip Code Lookup add-on product with a data file dated 03 - 1999 or later.

DTSTAMP

Returns the string used to stamp memo fields; the date, time, and User ID, separated by hyphens.

GETZIPINFO

Returns the area code, city, county, and/or state for a specified ZIP code. This function requires the ZIP code lookup add-on.

GETZIPCODE

Returns the ZIP code for a specified city. This function requires the ZIP code lookup add-on.

VERIFYZIPINFO

Validates a combination of city, state, and ZIP code. This function requires the ZIP code lookup add-on.

HASEVENT

Finds records which have fields containing a significant date that occurs from the current date to some number of days in the future or past. This function can be used to identify records with upcoming anniversaries, birthdays, or other important dates.

Month View

There is an indication on each day of the Month View showing how many items are scheduled for that day.

Toolbars

Most Activity Manager functions are accessed using one of two toolbars. The Activity Manager Tools are used to add and edit activities and navigate the calendar, while the Open View Layout Tools are used to control how the calendar is presented.

Undo

There is now an undo button for removing activities that have just been added.

HASACTIVITY()

HASACTIVITY() accepts new parameters. A date range and search string can now be specified.

Sales Forecasting Dialog Box

The Sales Forecasting dialog box has been changed to a tab format. There are five pages: Forecast, Contact Link, Sales Progress, Closed Sales, and Reports. Some of the new pages entirely replace dialog boxes which were previously accessed from buttons. Others divide functions which had been located entirely on the main Sales Forecasting dialog box. Also, there is a Paste Contact Info button for the Sales Forecasting memo field.

Save Merged Docs

There is an option to save merged documents. When selected, this will cause a file to be generated for each recipient of a merge document with the appropriate information included. This document can be accessed as any other linked document.

Readme

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(General'i½ i½
i½)<<1}

TeleMagic Enterprise V4 README

This readme includes information on V4. Additional hints, cautions, and corrections pertaining to your manuals are listed under the Help topics: Errata and Tips, Tricks and Technical Notes. We recommend you read this list and the on-line help topics as they contain important new information and hints to assist you in running TeleMagic.

The Following Subjects are Covered in this Topic:

[New Features](#)

[CD-ROM Directory Structure](#)

[Other Documents](#)

[Large Video Font Warning](#)

[Using Multiple Sessions of TeleMagic on one Workstation](#)

[Editing Records During Phone Calls](#)

[Fonts in Notepads](#)

[Help in the Report Generator](#)

[Sample Fax Cover Letter](#)

[CD-ROM](#)

[Date Format](#)

[Printable Help](#)

[Downtime Issues](#)

[Faxing from Word 7](#)

[Spell Checker Case Sensitivity](#)

[Hot Key for Call Notes](#)

[Zoom Dial from a Phone Icon](#)

[Field Validation with ":"](#)

[Adding TeleMagic V2 Templates](#)

New Features

A complete list of the new features in V4 can be found in the [New and Changed Features for V4](#) topic. If you have installed the large or medium help file, this information is also available in by searching on *New Features*, or selecting the *Introducing TeleMagic Enterprise V4* from the Contents page of the help file.

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CD-ROM

Your TeleMagic CD-ROM will be used both at the time of initial installation, and later to perform tasks such as installing Data Synchronization Server, installing one or more sample databases that were not installed originally, and more. It is very important that you keep your CD-ROM in a safe place after installation is completed.

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Directories on the TeleMagic Enterprise V4 CD-ROM:

| | |
|----------|---|
| TM | The V4 installation directory. |
| DOCS | A set of documents written in MS Write or in MS Word 7 (see below), plus supporting help systems. |
| Large | The largest version of the main help system. |
| Medium | The mid-size version of the main help. This system includes all information in the large help, but does not include most of the graphics. |
| Small | The smallest version of the main help. This system includes context sensitive help, a glossary, and the errata. |
| SAGEDemo | Contains demonstration versions of other Sage Group software. |
| DACEASY | Contains the demo for DacEasy accounting software. |
| TIMESLIP | Contains the demo for Timeslips time management software. |
| DATASYNC | This directory is referenced by the installation program when Data Synchronization Server is installed. |
| UTILS | The directory of miscellaneous utilities and special files |
| 15UPG | The TeleMagic for Windows 1.5 Upgrade (used if you have TeleMagic 1.0) |
| WIN95 | Support files for installing TeleMagic on Windows 95. |
| WIN98 | Support files for installing TeleMagic on Windows 98. |

[Return to Subject List](#)

Date Format

Prior to this version, if no date format was selected in Preferences, TeleMagic would detect the date format being used in each workstation's installation of Windows. In some cases this resulted in inconsistent application of date formats within the TeleMagic environment.

The first time TeleMagic is opened after upgrade, it will determine if a date format has been set in Preferences. If so, this format will be retained. If no date format has been selected in Preferences, TeleMagic will detect the date format used in Windows on the workstation where TeleMagic is initially opened, match that date format to a TeleMagic date format, and set that format as the default format for TeleMagic. If TeleMagic cannot match the date format, it will set English (United States) as the preferred style.

You should double-check your date format in System Preferences after installation or upgrade to verify the selected date format.

[Return to Subject List](#)

Printable Help

There is no longer a separate help system specifically prepared for printing. Help topics can be printed individually either from the help window or from the table of contents. Groups of topics can

be printed from the table of contents. See the [Printing Help Topics](#) topic in TeleMagic main help for more information. This topic is not available if you have installed the Small help system. If you have installed the Small help system, you will only be able to print topics from their help windows.

[Return to Subject List](#)

Other Helpful Documents

There are several documents stored in the \DOCS directory of your CD-ROM that can assist you in setting up and using TeleMagic (all files with .WRI extensions were written with Microsoft WordPad; all files with a .DOC extension were written with Microsoft Word 97): All of the information contained in these files is available in this Help system.

| | |
|--------------|--|
| NEWFEAT.DOC | This document lists the features in V4 that have been added, changed or enhanced since TeleMagic V3.x |
| PRO2ENT.DOC | This document contains instructions for converting data from TeleMagic Professional to TeleMagic Enterprise. |
| README.DOC | The source document of this topic. |
| UPGISSUE.DOC | This document contains instructions and important cautions when upgrading prior versions of TeleMagic to TeleMagic V4. |
| WIN95-98.DOC | This document contains special information about installing TeleMagic on a Windows 95 network. |

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Large Video Font Warning

TeleMagic V4 has been designed to work with large video fonts. If you have upgraded from a version of TeleMagic prior to V3.5, make sure that all of the views and pages of each of your databases and templates have been adjusted for large video fonts *before* attempting to use them. Until they have been adjusted, use them with small video fonts. If you attempt to open a database when using large video fonts and receive a "Position off Screen" error, your database has not been adjusted for large video fonts. Search on the key words "Large Fonts" in TeleMagic's on-line help for more information.

TeleMagic's sample templates included on this CD-ROM are designed for 640 x 480 video resolution with small video fonts. They will all run in larger resolution and with large video fonts. However, please be aware that Windows does not uniformly adjust the size of fonts when switching to large video fonts. Fonts will be expanded at different ratios, and some will not be adjusted at all. If your database uses a mix of font types, styles and sizes, objects on pages may change position due to the manner that Windows expands each of the fonts used. The only way to insure that a page expands in a uniform manner is to make sure that the page's default font, as well as the font, style and size used in all of the objects on the page, are exactly the same.

Depending on your video card's video driver software, you may see some unusual displays of

your information when using large video fonts. This may mean that your video card's software driver is not the latest version. Please contact your video card's manufacturer for the latest driver software, which will probably solve this problem.

[Return to Subject List](#)

Downtime Issues

When you set a downtime or disable the login, TeleMagic starts a timer to determine when users will be exited from the program. If a supervisor user logs back into TeleMagic when downtime or disabled login is in effect, there will be a 1 minute window before TeleMagic starts the timer. If the user accesses System preferences during this time and removes the downtime or unmarks Disable Login, he or she will be able to remain in TeleMagic. If the user does not access System preferences in this time, he or she will receive a five minute warning and be ejected in the usual manner. Once this timer starts, the user will be ejected from TeleMagic, even if he or she unmarks Disable Login. The login will no longer be disabled, however, the next time the user logs back in.

If you set a downtime to take effect at the current time and there are users in TeleMagic, they will be able to remain in the program for 5 minutes before the downtime actually takes effect.

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Using Multiple Sessions of TeleMagic on One Workstation

It is possible to run multiple instances of TeleMagic on a single workstation. If you plan on using this feature, there are a number of issues of which you should be aware:

- It is possible to have up to three instances of TeleMagic running simultaneously on one workstation.
- Each installation of TeleMagic has a maximum number of users who may be logged in at the same time. If you open two or more instances of TeleMagic on one workstation using the same User ID, this will only count as one user. However, if you use another User ID, or login twice with the same User ID from different workstations, each login will count against your user count.
- You must set your file handles to the maximum possible for your workstation.
- The first installation of TeleMagic that you open will be your "master" copy. If you intend to use faxing, wireless messaging, or run a filtered print, you must do so from this instance. Look at the program title bar to determine which is the primary instance. If this is the master copy, the standard title bar will be used. If it is a copy, the title bar will include [2] or [3] (depending on the order in which they were opened).
- If you use different user logins for the sessions, you will only receive alarm notifications for the user logged into the first instance.
- When you are ready to close TeleMagic, you must close the secondary installations before you close the primary instance.

- If you make changes to preferences in any instance of TeleMagic, these changes will not be reflected in the other instances until you have closed then re-opened them. If you save multiple changes to the same preference made in different instances, the changes made in the instance of TeleMagic that you close last will be retained.
- If you have a single user installation, you should open TeleMagic shared on each instance. See the "Exclusive/Shared" topic in TeleMagic's on-line help for more information.
- If you would like to disable the multiple instance capability, remove the files tmttool2.fl and tmttool3.fl from the TeleMagic global directory. (Consider moving them to another location to retain the option of using this feature in the future.) If any users have existing node installations, make sure you delete these files from the TeleMagic global directory on their local drives as well. Any node installations created after the files are deleted from the global directory will not include those .fl files. (If you just want to disable this capability on users' nodes, but retain it from the global directory, you can only delete the files from the local directories.)

[Return to Subject List](#)

Faxing from Word 7

When faxing documents created in Word for Windows version 7, turn off automatic spell checking and background printing.

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Editing Records During Phone Calls

If you toggle to a contact record and make edits during a phone call then click the Dial button, your edits will be saved. You will not be prompted and given the opportunity to discard the edits. If you wish to discard changes, use the **Cancel** button on the control bar before clicking Dial.

[Return to Subject List](#)

Spell Checker Case Sensitivity

The TeleMagic Spell Checker is case sensitive. If you add a word to one of the custom dictionaries, you should add it in both upper- and lowercase.

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Fonts in Notepads

If you click **Add Note** or **Notepad** on the control bar to access an Add Note dialog box or a Notepad dialog box, the font in use will be MS Sans Serif 10 pt. If you are using a different font in your memo fields, items will not align the way that they appear in the dialog box.

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Hot Key for Call Notes

If you are placing a call using the Dialer and have placed the Call Notes dialog box in the background, you can bring it forward by pressing ALT+D on the keyboard in addition to clicking the Dial button or selecting **Call Notes** from the **Office** menu.

[Return to Subject List](#)

Help in the Report Generator

To access on-line help in the Report Generator, press F1. Help for the main screen will appear. You can jump to the desired topic from there.

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Zoom Dial from a Phone Icon

If you dial a number from the phone field's phone icon with zoom dial active, TeleMagic will automatically dial the number in that same field for the next record when you terminate the call. Be aware that if you toggle to the contact record during a call, then use the **Call Notes** button to return to the Call Notes dialog box, when you move to the next record TeleMagic will bring up the Dialer dialog box with a selection of phone numbers instead of automatically dialing the number. If you wish to have TeleMagic continue to automatically dial the number, click on the Call Notes dialog box to return to it instead of using the **Call Notes** button.

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Sample Fax Cover Letter

Sample fax cover letters have been provided in the global lists for Windows Write, Word for Windows 6.0 and later, and WordPerfect 6.1. These samples included place holders where you can insert merge fields from your database.

[Return to Subject List](#)

Field Validation with ";"

It is possible to complete multiple fields from a list box item using a semi-colon (;). If you are using the semi-colon in a list box to complete multiple fields, it is not recommended that you have a validated list box or validation by expression associated with any of the fields that will be filled in. If you do, and the item being entered is not valid for the field, TeleMagic will stop on that field. The following fields will not be completed.

[Return to Subject List](#)

Adding TeleMagic V2 Templates

To add a template created in an installation of TeleMagic Enterprise V2, you must perform a

rebuild if the database includes list boxes. Rebuild is documented in detail in the *System Administrator Guide*. If you do not have access to the external rebuild feature, contact your system administrator.

[Return to Subject List](#)

Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_New_and_Changed_Features_for_V4)<<1} [New and Changed Features for V4](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½README_Installing_Enterprise_V4)<<1} [Installing Enterprise V4](#)

1. On the server, select **Start, Settings, Control Panel** from the taskbar. Double-click on the Network icon to open the Network dialog box. Click the **File and Print Sharing** button. Mark the I want to be able to give others access to my files check box. Click **OK** twice to save this setting.
2. Create a directory on the C: drive of the server that will be used as the network drive. Give the new directory a name that is fairly obvious, such as NETDRIVE.
3. Use Windows Explorer to set the new directory shareable. To do this, locate the directory in Explorer and right-click it. Click **Sharing...**, select Shared As:, then set Access Type: to Full. Click **OK**.
4. On the workstations, you need to map that directory as a drive letter. To do this, go to the Network Neighborhood and right-click on the directory you created in step 2. Select **Map Network Drive** from the menu. We recommend using drive F: (or a letter past F:) in order to avoid confusion with local drive letters.
5. Check the box that says Reconnect at logon.
6. Edit the CONFIG.SYS file in the root of the C: drive on the workstation, and add a line that reads FILES=200. If the FILES= line already exists, change the number following FILES= to 200. If there is no CONFIG.SYS file at the workstation, you will need to create one using a

text editor such as the Windows Notepad. If you do make a change to the CONFIG.SYS file, you will need to restart the computer for the change to take effect.

7. If the workstation is running Windows 95, run the program DCOM95.EXE on the TeleMagic CD-ROM. If the workstation is running Windows 98, run the program SPEU.EXE on the CD-ROM.
8. Follow steps 4 through 7 for each workstation.

Installing TeleMagic

1. From one of the workstations (not the server), run the TeleMagic SETUP.EXE program. If you are using the CD-ROM, Setup should automatically launch. (If it does not, it is located in the root of the CD-ROM.) If you are installing from disk, the Setup program is located on Disk 1.
2. The installation program will prompt you for a directory. Enter the drive letter you selected in step 4 under *Getting the Network Ready*. We recommend you use the default TM for the directory name, but you can use any name you like as long as it is eight characters or less.
3. Follow the on-screen instructions to finish installing TeleMagic.



- 4.

Continue...

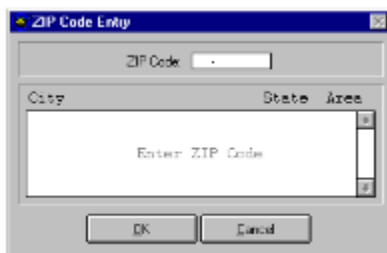
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_____154.BMP<JumpId(readme.hlp;½README_Readme)<<1} [Readme](#)

Zipcode Lookup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(General\½ \½
½)<<1}

The ZIP Code Lookup Add-on is very helpful for the user who spends a large amount of time inputting contact related information into **TeleMagic**. With Automatic ZIP Code Lookup, you can decrease the time it takes locating and inputting data for a contact's record. The city and state and area code information is automatically filled in for you based on the ZIP code you enter saving you valuable time to move onto other tasks.

This feature is easy to use. After it has been installed, just go to the record you want to fill in and press CTRL+Z. The ZIP Code Entry screen will open:



Enter a ZIP Code in the field and TeleMagic will automatically look up the city, state, and area code for that ZIP Code. If there is more than one city in the ZIP Code entered, they will each be listed. Select the desired entry and press **OK**. If you prefer, you can enter the ZIP Code in the record and press CTRL+Z. The ZIP Code Entry screen will then open with the ZIP Code, city, and area code information already present.

What about changes to area codes and ZIP codes? You can subscribe to a update service to keep your ZIP code and area code information up to date.

For more information and to purchase the ZIP Code Lookup, contact your local TeleMagic reseller or call (800) 835-6244.

Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp\½ README_Readme)<<1} [Readme](#)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp\½ README_New_and_Changed_Features_for_V4)<<1} [New and
Changed Features in V4](#)

Note for Using This Help System

The icon you just pressed is the Note icon. Notes are amplifying information which are intended to clarify an instruction. Notes accessed from this icon are specifically related to a particular step in an instruction, or less frequently, a specific paragraph in an explanation.

Hint for Using This Help System

The icon you just pressed is the Hint icon. Hints are amplifying information which offer a strategy for using a particular feature, setting, or option. They may point out a relationship between the feature being discussed and another feature.

Related Topics for Using This Help System

Actually, this is not a real Related Topics button. There is a real one at the top of the topic you were just reading. You can click on that one when you return to the previous topic to see what happens. The related topics offered when you click on the Related Topics button are intended to be a broad selection, so there are usually several of them.

This is not what you would normally see in a Related Topics window. Click on the **Back** button to return to the main Help topic.

General Note for Using This Help System

The button you just pressed is the General Note button. This button will usually be found in the top section of the topic, along with the topic title and the Related Topics button.

The information found in these topics differ from other notes in that they are not specific to a particular step or paragraph. For example, a general note for this topic may explain that most of the graphics in this topic are controls, which will either give you more information or allow you to move to another topic.

Since you may need to reference a general note at any time while studying a topic, they are accessed from a control which is accessible from anywhere in the topic, and are displayed in windows which you must close manually.

Mid-topic Hotspot for Using This Help System

Topics accessed from hotspots imbedded within the text will be displayed in a separate window from the first topic. This allows you to minimize the window you were just in, make any required changes based on the secondary topic, and return to the original topic without losing your place. These topics will stay on top so you can perform changes in TeleMagic without them automatically minimizing.

When finished with a secondary topic such as this one, simply close the secondary window in the usual manner.

Popup Hotspot for Using This Help System

Popup hotspots work just like the Note and Hint icons. When you open a popup hotspot, the topic will close as soon as you click anywhere on the screen. Popups may contain hotspot links to other topics. Popup Hotspots quite often display pictures of the feature or concept being discussed.

Continue Topic for Using This Help System

The **Continue** button will take you directly to another topic. This button is used when there is only one other topic that is related, or there are no other closely related topics (in which case the **Continue** button will take you to a topic which is related in a more general way). This topic was specifically created to illustrate the **Continue** button, so it is not quite the same as others. For one thing, it has no Related Topics button at the top. For another, the **Continue** button, below, will lead you back to the Using This Help System topic. **Continue** buttons are never labeled with the topic they lead to.

```
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|  
contdn01.BMP<JumpId(readme.hlp;½README_The_TeleMagic_Help_System)<<1}
```

Follow-on Topic #1

Unlike **Continue** buttons, the small buttons are labeled with their destination. There will always be at least two of these sorts of buttons. They will be located in the Continue... section of the topic.

Continue...

```
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½Readmex_Continue_Topic_for_Using_This_Help_System)<<
1} Continue Topic for Using This Help System
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(readme.hlp;½CONVERT_The_TeleMagic_Help_System)<<1} The
TeleMagic Help System
```

Follow-on Topic #2

This topic was created to illustrate the Continue to Topic button. The **Continue** button below will return you to the TeleMagic Help System topic.

```
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|  
contdn01.BMP<JumpId(readme.hlp;1/2README_The_TeleMagic_Help_System)<<1}
```


Hint for Step 3

If this is a first-time install, you will be given the opportunity to print out the Readme file. In addition to important installation issues, this file provides a guide for exploring the extra directories included on your CD-ROM.

Hint for Step 6

Remember that you can have only one central server. Make sure that you decide which site will be the central, which will be the satellite(s), and which will be the remote(s) before performing installation. It is recommended that you develop a written synchronization plan before setting up your sites and follow it during setup. This will keep you from inadvertently confusing your sites.

Hint for About TeleMagic Conversion

Click on the Related Topics button  at the top of each topic for a list of all topics in the same general category. You can jump to any topic of interest from the list of related topics.

Note for Step 26

If you are running the network version of TeleMagic, and some of your users have node installations. Users should not attempt to access their node installations until you have performed the upgrade to V4 and subsequently upgraded each node installation.

Note for Step 1

For users with DOS V9, it is recommended you first upgrade to DOS V10. The upgrade is available on the TeleMagic web site at <FTP://TELEMAGIC.COM/PUB/DOS/V12>. Download the file named TENUPEX.E. While it is possible to use the conversion programs provided to convert databases straight from DOS V9 to V12.3f, and from there to Enterprise V4, the Windows prompts will not exactly match the DOS V9 prompts, therefore some fields will contain the wrong information.

Note for Step 7

This is the ID TeleMagic will use to locate all databases in the system. Most users choose the User ID which belongs to their TeleMagic System Administrator. If you are not using security, or are unsure of the user's ID, leave it blank.

Note for Step 1

Before you begin the conversion process, make sure that you and all users exit TeleMagic for Windows. If your database is not V14 or V12.3f, see the [Upgrading from DOS Versions Prior to V12.3f](#) topic.

Note for DOS to Windows Conversion

If you are planning on taking advantage of TeleMagic for Windows' relational database structure, conversion will create one single-page view on each level. If you will be storing all of your records on one level, TeleMagic will create one single-page view on that level. Any additional fields will be in the database, but will not appear on the screen. You must add them using the Screen Designer. (See the *Screen Designer* chapter of the *System Administrator and Installation Guide* for instructions.)

Note for Step 7

It is recommended that you store all new directories in a unique directory name off the \DATA\ sub-directory in the TeleMagic global directory path (C:\TMWIN\DATA\ by default).

Note for Step 8

TeleMagic automatically knows from which version you are converting. If it is version V12, you will see Appointments in the place of Activities in the figure above.

Note for Step 11

You need only add one or two fields to the list on the right. For example, in order to know that several contacts belong to the same company, TeleMagic only needs to see which records' Company fields contains the same data. It is recommended that you add as few fields as possible to this list. If you have multiple fields, TeleMagic will check each one to make sure that the data contained in them exactly matches. The more fields you use, the more chance that there will be a slight variance in the data from one record to another (for example, one record might use Ste. in an address field, while another uses Suite), resulting in unnecessary Level 1 records being added.

Note for Step 11

In TeleMagic for DOS, the Company Name is normally stored in the COM field. Since the Company Name is normally the same for all contacts in the same company, TeleMagic adds the COM field by default.

Note for Step 21

In addition to the CONVERT.TXT file, an error file called ERRMEM.TXT, located on the root of the C: drive, is created for users to check any errors that may have occurred during the conversion.

Note for Step 4

Although using a non-dedicated server is not supported or recommended, it is still possible if absolutely necessary. In order to do this, you will need to use the SUBST command. Add a line to the AUTOEXEC.BAT file on the server that reads: `C:\WINDOWS\COMMAND\SUBST F: C:\NETDRIVE` then restart the computer. This command can also be used on a dedicated server to enable running the TeleMagic Rebuild program on the server.

Note for Converting List Boxes

If you choose to convert list boxes, and are already set up as a TeleMagic for Windows user prior to the conversion, after the conversion is complete you must change the List Boxes Directories preference to be database-specific in Preferences. See Directories Preferences in on-line help for more information.

Note for Using DSS to Upgrade

This procedure assumes familiarity with Data Synchronization Server. Where specific procedures are not offered, refer to your Data Synchronization Server documentation.

