# Contents

The following Help Topics are available:

# Designing Databases

# Program Features Setup

# Advanced Features

# Adding Optional Items to Your Installation

# TM.INI

**WARNING!**

It is not recommended that you edit the TM.INI file unless absolutely necessary. It is highly recommended that if you must edit the TM.INI file, you seek the assistance of your TeleMagic Reseller.

You will find the following information in the TM.INI file located in the TeleMagic \PROGRAMS directory:

## [Dirs]

*This section contains information on your directory locations. If you change the location of your TeleMagic files, this section must be updated.*

| | |
|---|---|
| **Installation=** | Lists the location of the TeleMagic root directory. (e.g., C:\TM4\) |

## [Versions]

*This section contains information on your current and past version numbers. This is automatically generated by TeleMagic. To avoid conflict, it should not be manually edited.*

| | |
|---|---|
| **Version=** | The current version of this installation/Node. |
| **Ver*X.X*=*X.X*** | The signifies that Version ***X.X*** of TeleMagic has been installed at some point on this system. |

## [Windows]

*This section contains a list of TeleMagic support files which are located in the \WINDOWS\SYSTEM directory.*

## [Windows NT]

*This section contains a list of TeleMagic support files which are specific to Windows NT.*

## [Windows 95/98]

*This section contains a list of TeleMagic support files which are specific to Windows 95 and 98.*

## [System Setup]

*This section contains information that is automatically generated by TeleMagic. Most of this information is used in data synchronization. To avoid conflict, it is highly recommended that it not be manually edited.*

| | |
|---|---|
| **GENID*XXX*=*XXX*** | This signifies that the System ID ***XXX*** has been used in the past. |
| **ID=** | The System ID. |
| **Global Pager Terminal=** | The default pager terminal number used in Wireless Messaging. |
| **Date Format=** | Global Date format preference. |
| **Century=** | Controls whether century is set on or off in date fields. |
| **Sync Installed=** | This displays whether this installation is used with Data Synchronization Server. |
| **Gen Trans=** | Generates transactions of changes used in synchronization. |
| **EXCLUSIVE=*Y/N*** | An optional line to open TeleMagic in exclusive mode (only one user may open it at a time) or shared mode (for multiple users). Enter Y to open exclusively, N to open shared. |
| **Clock=** | The clock can be turned off by inserting the line CLOCK=OFF in this section. This can reduce network traffic when using dumb terminals by reducing the number of screen updates. |

## [TeleMagic Update]

*This section contains information that is automatically generated by TeleMagic. It should not be manually edited.*

## [Developer Update]

*This section contains information on files used with add-on programs that need to be copied to any node installations of TeleMagic. Only qualified TeleMagic resellers should edit this information.*

**NumFiles=*X*** This lists the total number of files that need to be copied.

**UpdFile*X*=*file_name*** (Where ***X*** is the line number.) Gives the name of a file that needs to be added to the node.

**Example:**

NumFiles=2
UpdFile1=FILE.EXE
UpdFile2=FILE.INI

# Glossary

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# Tips, Tricks, and Technical Notes

# Introducing TeleMagic V4

# New and Changed Features in V4

# Troubleshooting

# ZIP Code Lookup Add-on

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, state, and area code information is automatically filled in for you based on the ZIP code you enter, saving you valuable time to move on to other tasks.

This feature is easy to use. After it has been installed, just press Ctrl Z after entering the ZIP code into the contact record. After ZIP Code Lookup has entered the city, state, and area code, you can continue entering the rest of the contact information. It's that simple!

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.

## Common Questions and Answers

Q: I can see lots of field prompts, but no fields when I open a database.

Q: I assign activities to another user, and they don’t appear on that user’s calendar.

Q: I keep getting a message about “the last in a series of recurring activities” when I open the Activity Manager.

Q: I open TeleMagic, and see only a blank screen.

Q: When I move down a level, I see records that are not related to the record I started from.

Q: The same activity shows up with a different time/date in an activity history field and a last activity field

Q: I set up a list box for a phone field, but it is not working properly.

Q: Selected Objects in the Screen Designer Don't Appear Selected, and Vice Versa.

Q: Why Does My Page Appear Black when I Use the Report Page Preview Function?

Q: I get the message "Your dictionary preferences have not been configured" message.

Q: There are no fields available when I try to add an expression in the Report Generator.

Q: Why is the Data Environment item on the View menu checked while the Data Environment is closed?

Q: When I create a checkbox in the Screen Designer, the prompt appears in 3D.

Q: I have TeleMagic open, but I cannot link my TeleMagic Internet Mail message to the current contact.

Q: I get the message '...\<folder>\<filename> is not a valid filename'

Q: I have updated my global installation. My node seems to be updating files, but it never finishes.

Q: I get Out of Memory errors or General Protection Faults on the system where I run Automation Server.

## Q: I can see lots of field prompts, but no fields when I open a database.

The security group to which you have been assigned has rights to access the database in question, but has not been given full access to all its fields. If there are fields you need to access, but currently do not have rights to, see your system administrator, or another user with supervisor-level rights, who can update your security following the instructions in the *Security* chapter of the *System Administrator Guide.*

## Q: I assign activities to another user, and they don’t appear on that user’s calendar.

In Preferences, both you and the other user should check the `Location of Activities Files` field. If your directories are stored in different locations, it does not matter what calendar access rights you have, you will not be able to schedule activities for one another. Resolve the problem by having all users point to the same storage location (ideally your TeleMagic \COMMON\ directory.)

## Q: I keep getting a message about “the last in a series of recurring activities” when I open the Activity Manager.

The activity mentioned in the message is the last instance of a recurring activity. Even if you have marked it as completed, until it is deleted TeleMagic will continue to remind you about it when you are on that day in the Activity Manager.

# Q: I open TeleMagic, and see only a blank screen.

Take a look at the status bar, at the bottom of the screen. It should show your User ID, and the name of the database currently open. If it says no database is open, open a database (see the Opening a Different Database topic). If the status bar says that a database is open, then you have not yet opened the Contact Manager. Open it by choosing **Open Contact Manager** from the **Contact Manager** menu.

## Q: When I Move Down a Level, I See Records That Are Not Related to the Record I Started From.

The “**See Only...**” options on the **Contact Manager** menu control what you see when you switch to a lower level. When selected, these options allow you to see only related records when you switch to Level 2 or Level 3. If these are not selected, you will be able to scroll through all records on the level.

# Q: The Same Activity Shows Up With a Different Time/Date In An Activity History Field and a Last Activity Field

By default, an activity history field shows the *due* time of an activity. An activity field set up to display the first or last activity with a contact, shows (by default) the *completed* time of the activity. This may look confusing, but it is not inconsistent with the purpose of the fields.

# Q: I set up a list box for a phone field, but it is not working properly.

Depending on the settings of a phone field's template, you may or may not need to add parentheses, dashes and/or slashes to list box items. When adding a list box to a phone field you should create a test entry and place it in the field (using the new list box) to be sure that the field fills correctly. If you notice that parts of the list box entry get replaced by the field's non-mask characters (parentheses and dashes, for example) you should check the field's template. (From the **File** menu, choose **Add / Edit Fields**, choose the field from the list, click **Change**, then click **Template**. The Phone Field Template dialog box will open.) If the option `Don't save literal characters with the data` is checked, this means that the field's parentheses and dashes are not being stored with the field's data, and that those characters need to be added to the list box items. Alternatively, you could uncheck this option, and use only numbers in list box items.

# Q: Selected Objects in the Screen Designer Don't Appear Selected, and Vice Versa.

When an object is selected in the Screen Designer, TeleMagic draws a selection border around the object. This border toggles on and off as objects are selected and deselected. If something in your environment causes focus to be taken from the TeleMagic window, selected items will no longer be selected; however, TeleMagic will not know to remove the selection border. The next time you select those items, the selection border will toggle and the items will appear to be deselected when TeleMagic actually views them as selected. If this appears to be occurring, select **Page**, **Redraw** from the Screen Designer menu, or press CTRL+R. TeleMagic will refresh the selection borders. (If another window pops up over TeleMagic or you switch to another application while you are working in the Screen Designer, it is a good idea to refresh your screen, especially if you had any objects selected.)

# Q: Why Does My Page Appear Black when I Use the Report Page Preview Function?

Some Windows printer drivers do not support the Print Preview function; the page will appear black when this occurs. As long as the page prints correctly, this should not be a problem. If you wish to preview your reports, you can attempt to find another driver for Windows for your printer (if one is available) to correct this problem. Contact the printer manufacturer.

## Q: I get the message “Your dictionary preferences have not been configured.”

The <userid>spell.cfg and <userid>spell.dct files have been erased from your user folder. To correct this, you have two options: either log out of TeleMagic and log back in. or open the Spell Checker Preferences dialog box from the Options, Maintenance dialog box and select OK. This will restore the <userid>spell.cfg file. The <userid>spell.dct file is the user’s custom dictionary and cannot be automatically replaced.

## Q: There are no fields available when I try to add an expression in the Report Generator.

The tables that are to be included in the report have not been identified. To set this, click the Data Environment button. The Data Environment dialog box will open with the current tables displayed. You can change the data environment from this dialog if you want a different set of tables. You do not need to leave this dialog open. TeleMagic automatically sets the data environment to the current database when the Data Environment button is clicked.

## Q: Why is the Data Environment item on the View menu checked while the Data Environment is closed?

This condition occurs after the Data Environment is opened, an item is right-clicked, and Report Designer is selected from the floating menu. There are two ways to reopen the Data Environment dialog box. You can either click the Data Environment button, or you can select Data Environment from the View menu twice. The first time will clear the check mark, the second will restore the check mark and open the Data Environment dialog box.

## Q: When I create a checkbox in the Screen Designer, the prompt appears in 3D.

The text will appear plain, if that is what you have selected, on the page in your database.

# Q: I have TeleMagic open, but I cannot link my TeleMagic Internet Mail message to the current contact.

This will occur if your TeleMagic Internet Mail mailbox is associated with an installation of TeleMagic other than the one that you have open. You can only have one TeleMagic Internet Mail mailbox with a particular user ID on any workstation. (You can have mailboxes for different user IDs on the same workstation, and you can have the same ID on more than one workstation.) If you access more than one installation of TeleMagic from the same workstation, you will need to establish mailboxes with different user IDs. If you have deleted a user who had a mailbox on a workstation, the mailbox may not have been deleted. To delete a mailbox from a workstation, run the following from the Windows Run dialog:

C:\TM4\PROGRAMS\TMMAIL.EXE /CLEANREG=???

If your TeleMagic installation is not C:\TM4, substitute the correct path. Replace the question marks (???) with the user ID of the user whose mailbox is to be deleted.

## Q: I get the message '...\<folder>\<filename> is not a valid filename'

TeleMagic does not support relative paths (…\<folder>\). You must enter the full path to the file.

## Q: I have updated my global installation. My node seems to be updating files, but it never finishes.

When the node is updating, no other instances of TeleMagic can be open on the workstation. Close all instances of TeleMagic before opening a node which is attached to an installation that has been recently updated.

## Q: I get Out of Memory errors or General Protection Faults on the system where I run Automation Server.

If you run Automation Server under Windows 95 or Windows 98, are using Word 97 as one of your word processors, and are sending faxes which do not contain merge fields, this problem will develop. What is actually happening is that an error is being generated by Word 97 whenever a fax is processed that does not contain merge fields. The error is automatically handled by the Automation Server, but under Windows 95 and Windows 98 this results in an unrecoverable loss of resources. The preferred solution is to run Automation Server under Windows NT, where this problem does not occur. If this is not possible you can either:

- Insure that the `Do Not Merge Any` option is selected on the Options page of the Fax dialog box whenever a fax without merge fields is sent, or
- Include a merge field in all faxes. This can be a blank field, or a field that prints white so that it does not appear in the fax.

# General Problem-Solving Methodology

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

Many programmatic problems become familiar over time, even if the user is not already familiar with the program in question. TeleMagic is no exception to this rule. You will find the System Information screens, available off the **Help** menu, useful in determining the current system configuration; see TeleMagic System Information Screens.

There are a few basic strategies:

Fix a little bit at a time. Especially if you are unfamiliar with an advanced option, try it out as simply as possible. Experiment on a simple expression before a complex one (e.g., when creating a filter select all the records with a company name beginning with “A” before you try to isolate all the non-paying customers in Joe’s sales region).

When possible, create a test setup. Copying the Documentation database to your own testing database and creating a test user and group for experimenting is a good way to keep out of real trouble. It also prevents you from making mistakes on “live data” or paying customers.

Compare the problem database to another working setup. What differences are there between the problem database and a “good” one?  Is the problem only occurring at a particular workstation?  Is it only on records that have been recently imported?  Often, the problem will be in the way the area was set up. For example, if your standard reports do not seem to be printing the correct information, check your Key Field preference settings to make sure that you have established the fields correctly.

Compare the user settings, database settings and security settings. If someone cannot see a database, they may be in a group that does not allow them to. If someone cannot see a record, perhaps it is time to rebuild and pack.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1}

# Changing Your Help File

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

During installation, you had the choice of installing one of three help files for use with TeleMagic. The largest help file contains helpful graphics of dialog boxes and examples. The medium help file contains text topics with a minimum of illustrations. The smallest help file contains only context-sensitive help and errata from the printed documentation. If you decide that you want to change your help file selection, you can do so using the installation CD-ROM.

## To Change Your Help File:

1. Exit TeleMagic and perform a complete backup of your system.

2. Insert the TeleMagic 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.

   The Setup program will launch and the TeleMagic Setup screen will open.

3. Select the first button (`Install/Upgrade TeleMagic v4 or add items to an existing v4 installation`).

   The Welcoming screen will open.

4. Carefully read and follow any instructions on the opening screen. Click **Next>** when you are ready to proceed.

   The Key Disk Needed screen will open.

5. Since changing your dictionary does not require a Key Disk, blank out the default drive specification and click **Next>**.

   The Choose Destination Location screen will open. You will be asked to specify where you would like to install the program.

6. Enter the path to your TeleMagic global directory (the directory where your TeleMagic files are located) and click **Next>**.

   An Add New Items screen will appear informing you that you have chosen an existing directory and may only select to add new templates, spelling dictionaries, and/or help files.

7. Click **Next>**.

   The Custom Install screen will open.

8. From the list of `Components`, select the `Help File`

check box. (Unmark the `TeleMagic Templates` check box if it is selected.)

9. Click **Next>**.

   The Help File screen will appear listing the help file options.

10. Select the desired help file and click **Next>**.

    The Ready? screen will appear listing your selections.

11. To accept the displayed choice, click **Next>**.

**or** Click **Back>** to return to adjust your selection.

When you click **Next>**, the help file installation will commence. A status bar will apprise you of the status. When it is complete, a Setup Complete screen will appear.

12. Click **Finish**.

    The Setup program will close.

**Warning!**

If you experience problems with the help system after changing to a different size, close the help system and delete the TM.GID file from the /TM/HELP directory. In addition, if you have changed to the small help from either the large or medium help, delete the TM.CNT file from the /TM/HELP directory.

In addition to the main help projects, there are independent help projects for Data Synchronization Server, Template Maker, The Database Utility, TeleMagic Internet Mail, Readme documentation, selecting the appropriate help project, as well as others intended only as support projects for one or more of the major projects. Not all of the help files are automatically installed during the setup procedure. Some topics have links to topics in other help projects. For these links to work, the target project must be installed in the same directory as the calling project. If it is not, you will be given the option of browsing for the target help project.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1}

# User Monitor

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½ADVANCEX_Hint_for_User_Monitor)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

At any time, you can tell exactly who is logged into TeleMagic and what databases they are using. Not only is this useful when you are performing a program function that requires that all other users be out of TeleMagic, this also helps in troubleshooting some types of errors. For example, if you are attempting to perform a group replace and encounter a record lock, you can use the User Monitor to determine who is in the database and potentially editing a record.

The User Monitor is available by selecting **Help**, **User Monitor** from the Main menu.

This screen will be continually refreshed as users move about in TeleMagic. (It is not recommended that you leave it open constantly due to the required load on the network. This screen was designed to allow you to quickly check the users in TeleMagic any time it is necessary to determine who is logged in and to what databases.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_About_Screen)<<1} About Screen
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# TeleMagic System Information Screens

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

You will find the About and System Information screens useful for many reasons when using TeleMagic, especially when you are troubleshooting an installation.

## Select a Topic:

About Screen
System Information Screen
User Monitor

# About Screen

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½ADVANCEX_Hint_for_About_Screen)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

Once you have installed TeleMagic, your serial number (and other important information) will be displayed on the About screen (accessed by choosing **Help, About** from the Main menu.)

The About screen contains information concerning your version of TeleMagic, registration information, and information on where to get technical and customer support.

The top portion of this screen will display the version number and how many users may access TeleMagic at the same time on a network. Directly below this is your registration information and serial number.

The bottom portion of this screen displays addresses, phone numbers, and Internet information for contacting TeleMagic. This information can be used to reach TeleMagic's support technicians should you require technical support or TeleMagic's customer support department should you require sales information.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½ADVANCED_User_Monitor)<<1} User Monitor
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# System Information Screen

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

The System Information screen provides detailed system related information. It is accessed by selecting **Help**, **System Information** on the Main menu.

This screen allows you to view a scrolling list of information related to the user currently logged into TeleMagic, the currently open database, the current record, your TeleMagic installation, and your environment. To view information in any of these areas, select the appropriate radio button and use the scroll arrows to view the list. If you need to print or fax this information, use the **Print** and **Fax** buttons. Selecting **Print** will send the information to your default printer. Selecting **Fax** will allow you to print the information to the fax printer driver. For more information, see Faxing Standard Reports.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_About_Screen)<<1} About Screen
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_User_Monitor)<<1} User Monitor
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# Isolating and Recognizing the Problem Type

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

Memory
Windows
Programmatic (TeleMagic)

## Memory

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

If the user complains about speed, he or she may not have enough memory to run TeleMagic efficiently. If the user *does* have sufficient RAM, but is getting "out of memory" errors, ensure he or she is not running too many large applications at once.

Fonts installed within Windows can take up a lot of room. Ensure that you do not have more fonts installed than you need. Some programs can add hundreds of fonts to your system with very little warning. Windows will not give a warning if more than the permissible number of fonts has been loaded. Check your Windows Fonts Control Panel to see how many are in your system.

See *Optimization*, in the *Utilities and Maintenance* chapter of the *System Administrator Guide*, for helpful information on speeding up the installation of TeleMagic, especially on a computer with only thirty-two megabytes of RAM. It also discusses methods of reducing the memory overhead for all Windows programs.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Windows)<<1} Windows

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Programmatic_TeleMagic)<<1} Programmatic (TeleMagic)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

## Windows

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

Microsoft Windows has specific requirements for access to networks. These are covered in *System Requirements*, in the *Installation* chapter of the *System Administrator Guide*.

If a problem occurs in more than one program, the cause usually lays within the Windows environment itself. Windows troubleshooting, as separate from program troubleshooting, is beyond the scope of this help system. The Microsoft Windows Resource Kit, available through most resellers, is a good troubleshooting resource.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Memory)<<1} Memory
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Programmatic_TeleMagic)<<1} Programmatic (TeleMagic)
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

## Programmatic (TeleMagic)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

If a database cannot display, or a user cannot find, particular records, check that it has been rebuilt lately. Also ensure that the user is in a group with access to those records. Depending on the filters used for a group, it is possible that a user could *add*, but not *retrieve* a particular record.

If running in a network environment, make sure the user is logged into the network before starting up TeleMagic. It is best to log in before starting up Windows, too.

If a database is not accessible, ensure that the user has rights (by checking the TeleMagic group or groups he/she belongs to) for the intended operation. Try the same operation from a user that is a member of the supervisor group. Ensure that any necessary network drive mappings have been done before starting the program.

If a copy of TeleMagic crashes, or the computer it is on crashes without being properly logged out of the network, it may leave files open on the network. These files would not be accessible to other people on the network until the crashed user was properly logged out. It may be necessary to use your network's administrative tools to force the user to log off. (Often this problem can be cleared by having the user log back into the same computer.)

While some networks and third-party products can, optionally, log people out after a period of no input to the computer, this is not desirable for TeleMagic users. These programs tend to leave files open, which means TeleMagic databases can be left in an undefined state. Newer programs will close files, but cannot force TeleMagic to flush any cached changes. We recommend that you not use such programs, unless you test them thoroughly.

We also recommend that you teach your users to exit from Windows *before* they turn their computers off. This makes it more likely that they will have properly saved their work in TeleMagic, especially since Windows will signal the program to close down in an orderly fashion before exiting, and typically prevents problems to Windows itself.

TeleMagic has extensive error checking when generating Contact IDs. If you have experienced a problem (such as a system crash) that affects the table that stores your Contact IDs, you will not be able to store a new record if the ID matches one already existing. If multiple duplicate Contact IDs are detected when you attempt to add new records, on the third attempt you will be instructed to run a rebuild and TeleMagic will close.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Network_User_Count)<<1} Network User Count

## Network User Count

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

The serial number that you receive when you first purchase TeleMagic limits the number of users that can *be logged in* to TeleMagic at any one time. (It does not limit the number of users who can be set up to use the program.)  If too many users try to log in at any one time, TeleMagic will display a message saying that the maximum number of users are logged in.

If this occurs, you have exceeded the number of users allotted by the copy of TeleMagic you purchased. Make users aware of the fact that if they reboot out of TeleMagic, the network operating system may still hold their files open. Most networks will eventually detect that the station has gone, and will clear its connection. This in turn will open a TeleMagic slot. To ensure that this happens, the machine that rebooted must reload its network drivers. This will force the network to clear the previous slot.

A similar problem occurs when a user experiences a general protection fault under Windows, and does not exit Windows, but just reloads TeleMagic. That user then holds two TeleMagic slots until Windows is exited and restarted.

A more long term solution to problems involving the number of users would be to purchase an Additional User License, which allows more simultaneous logins. Contact your TeleMagic Reseller for details.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(convert.hlpï¿½convert_Upgrading_Your_User_Count)<<1} Upgrading Your User Count

# User’s System Setup & Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

As with any other program, it is always easiest to compare a working system with one that is having problems. Compare the user’s setup with other setups that do work.

You will find the `User` radio button under the **Help**, **System Information** screens useful in troubleshooting the installation. (See TeleMagic System Information Screens for more information.)

If users receive error messages related to having too many files open, check the computer’s setup, especially the number of FILES in the CONFIG.SYS (or network equivalent) file. The file handles should at a *minimum* be set to 150; ideally they can be up to 255. This message can also occur if the user attempts to run multiple copies of TeleMagic simultaneously without sufficient file handles. If you will be running two copies of V4 simultaneously, you will need at least 230 file handles in your CONFIG.SYS.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1}

# Database Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

If you have a specific problem with a database (as compared to problems *accessing* the database), you might need to rebuild and pack it. See the Rebuild topic for instructions.

If you have records that appear to contain “garbage”, or nonsense records that you did not add, make sure no one performed an import with bad data. It is always best to make a safety copy of your database before importing data, especially with large files.

If possible, recopy a backup or safety copy of the database to the working directory (first making sure no one is using TeleMagic) and retry the offending operation. If you have important data that you cannot do without, contact your reseller for assistance. Do not modify the data further, or make a safety copy of the database directory if necessary.

If you encounter an error, use the following steps to resolve it:

- If you have recently crashed your server, restore TeleMagic from backup. (It is important that you maintain a consistent backup program. See Data Backup for more information.)

- If an error message occurs, make careful note of the exact error message text and number. Error messages will include both a number and a message, such as: error 109, Record is in use by another. Note both the number (109) and the text of the message (Record is in use by another). Also note any references to a database or table in the error message.

- If you receive the error message: error 26, table is not ordered, performing a rebuild on the database in question will usually resolve the problem. See Rebuild for instructions.

- If you receive any other type of error message, you should contact your reseller or TeleMagic technical support. Be prepared to provide the pertinent data concerning the error message, as well as details on what you were doing when the error occurred. (You can use the TeleMagic Error Log to record the error. See Logging and Viewing Errors for more information.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Locally_Installed_Databases)<<1} Locally Installed Databases
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# Locally Installed Databases

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

When installing a database, it is important to secure its location. In a network installation, users can create databases on their local C: drives. However, if more than one user creates a local database with the same path, there is the potential for confusion. To preserve data integrity, it is recommended that you do *not* create databases with the same path.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Database Troubleshooting

# Video and Display Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

TeleMagic requires 100% Windows-compatible video cards and drivers. If you have General Protection Faults when screens “paint,” or if borders, fonts, text alignment, or status bars do not seem to display properly, you may be having a problem with your video driver.

If you have problems with display or General Protection Faults, use the VGA.DRV or the SUPERVGA.DRV drivers that are included with Windows. If the problem goes away, the old driver was probably the cause of the problem. Contact your video card vendor for the most recent version of the driver. In the meantime, use the Windows drivers.

When using a Mach32 video card with a Gateway 2000, you may get a General Protection Fault in module MACH32.DRV at 033 : 0E22. If this occurs, you are experiencing a problem with your video driver. Contact your video card vendor for the most recent version of the driver. Alternatively, download the Windows Driver Library on the Microsoft Windows Download Service. In the meantime, use the VGA.DRV or the SUPERVGA.DRV drivers that are included with Windows.

TeleMagic requires hardware that is 100% Microsoft compatible. Visit the Microsoft web site and search on ‘HCL’ (hardware compatibility list) for a complete list of compatible hardware.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1}

# Printing Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

Using a dot-matrix printer to print reports or form letters for TeleMagic will usually result in abnormally long printing times. To avoid this problem, we recommend using either a laser printer or an inkjet printer that is correctly set up for the Windows environment.

If you encounter an error concerning OLE objects when attempting to print the Month at a Time report, your printer driver may have insufficient memory to deal with the icons included in this report.

Sometimes when you print a report or word processor document, you will be prompted that the printer is the TeleMagic Fax driver and that it should be changed. It is important that you change the printer to your normal printer if you receive this message as errors will probably occur if you continue with the print using the TeleMagic Fax driver.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1}

# Local Wireless Messaging Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

When sending or receiving wireless messages, you may encounter errors that either occurred in the sending or receiving end of the transmission. The following is a list of possible errors and their meanings:

| Error Message | Meaning |
|---|---|
| Message Failed! Reason: Unknown | An unknown error occurred. |
| Message Failed!<br>Reason: Com Port Not Found | The Com Port entered in Wireless Messaging preferences is not recognized by Windows. |
| Message Failed!<br>Reason: Modem Not Found | There is no modem attached to the specified Com Port. |
| Message Failed!<br>Reason: No Dialtone | No dial tone was detected by your modem. |
| Message Failed!<br>Reason: Unable to Connect | A problem has occurred during the connection with the remote messaging terminal (carrier terminal). |
| Message Failed!<br>Reason: Invalid Pager ID | The pager ID used is not recognized by the remote messaging terminal (carrier terminal). |
| Message Failed!<br>Reason: Remote Error (No Connect) | Unable to connect due to a problem with the remote messaging terminal (carrier terminal). |
| Message Failed!<br>Reason: Remote Error (ACK) | A problem has occurred with the remote messaging terminal (carrier terminal), call the terminal for details. |
| Message Failed!<br>Reason: Canceled | The message was aborted in mid-transmission. |

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1}

## Automation Server Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

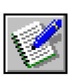
Many of the local fax troubleshooting tips are also applicable for the modems attached to the server. (See Local Fax Troubleshooting for details.) There are one or two additional points to keep in mind when dealing with multiple modems.

*If you are experiencing delays of several minutes* while TeleMagic searches for faxmodems on your system, make sure that the COM Ports do not have IRQ or memory address conflicts with other devices on the system. (If you are using more than 2 faxmodems, you will experience IRQ conflicts with TeleMagic if you are not using a serial board. See Automation Server System Requirements for more information.)  Also, check that *each* of your COM Ports is identified correctly within Windows. The Control Panel's Ports settings must match the hardware setup.

*If you are using multiple faxmodems*, we suggest that your COM Ports have 16550A UARTs. If you use 8250 UARTs with more than one faxmodem, problems will be created because of the way Windows handles COM Ports: the port will drop characters, and faxes and messages will fail. If using 16550A UARTs still does not resolve your problem, try adding this line to the [386Enh] section of your SYSTEM.INI file:   COMBoostTime=5   (2 is the default setting: try a setting of 5 or 6.)   Again, if you are using more than 2 faxmodems, you should use a serial board.

*If you are sending faxes from the server,* pay special attention to the server requirements detailed in the section Before Setting Up the Automation Server You Need to Know.

*If you are getting out of memory errors on your server,* pay special attention to the `Memory Status:` line on the Automation Server's Process screen. This line displays the memory and resources available. If your memory and/or resources are low, the Automation Server will not be able to function properly. To avoid any problems, the Server will automatically restart Windows if the resources fall below 10% or the available memory falls below 5 MB. (These defaults can be changed using command line parameters. See the section Automation Server Parameters for more information.)   If this display is red, you are dangerously low on memory; if it is yellow, you should monitor your memory carefully; if it is green, you do not have an immediate memory problem. If you do encounter a problem with your available memory, close any unnecessary applications. If the problem continues, consider running the Automation Server on a workstation with greater resources.



*If you have tried all of these options* and are still experiencing problems, try exiting Windows or turning off your computer. Sometimes COM Ports get corrupted over time, and the only way to clear them is to start over.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Troubleshooting_Tools)<<1} Troubleshooting Tools
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Error_Messages)<<1}
Automation Server
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Error_Messages)<<1} Error

Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_The_TeleMagic_Automation_Server)<<1} The TeleMagic Automation Server

# Automation Server Troubleshooting Tools

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

*If a faxmodem attached to a server fails to respond after 3 tries*, the faxmodem will be removed from service and the Operator will be notified of the situation by E-mail.

*If a fax fails and you have set up the Fax Stamp Key Field in Contact Key Fields to be a memo or character field*, the selected field will be stamped with information concerning the failed fax. When a fax fails, an X will be placed in the field, followed by the date of the fax, the percent of completion the fax reached before failing, and the number of pages that were successfully completed over the total number of pages. For example, X 11/19/99 75 3/4 would indicate the fax sent to the contact on November 19, 1999 was 75% complete, with three out of four total pages successfully sent, prior to failing. If you are using a character field, you can then create a filter that searches for an X as the first character in the field selected as your Fax Stamp Key Field to quickly view or report on contacts with failed faxes. (The Key Field must be a character field that is long enough to accommodate the information. If you will be filtering on the failed faxes, make sure you do not select a memo field. For more information on setting up the Fax Stamp Key Field, see the Key Field Preferences topic.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Error_Messages)<<1}
Automation Server Error Messages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_The_TeleMagic_Automation_Server)<<1} The TeleMagic Automation Server
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# Automation Server Error Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

The error messages that may be encountered when processing wireless messages through the Automation Server are the same that may be encountered when sending locally. See the Local Wireless Messaging Troubleshooting topic for details.

The following is a list of the possible server-related error messages you may encounter for failed faxes and their meanings:

| **Error Message (Server Result Code)** | **Meaning** |
|---|---|
| Contact Not Found | The contact to whom the fax was being sent no longer exists in the database, or cannot be located in the database. |
| Could Not Begin Send (Timeout) | A fax is queued but the server is unable to start sending. You may need to reboot. |
| Could Not Convert Graphic | The graphic in a fax is in the wrong format. Check the format of the file. You may have to resend the fax with the graphic included as an external file. |
| Could Not Find WordPro EXE | The server could not find the executable file for the required word processor. Check that the path for the executable has been set up correctly at the server's workstation. (See Establishing Your Word Processors, for more information.) |
| Could Not Open Database | The server must be able to access the database from which the fax was queued. If it fails to open the database (for example, because the database is located on the user's hard drive) it will return this error message. Check that the database is accessible to the server; and that it was not being rebuilt when the server tried to access it. Also check to make sure that there are sufficient file handles to open the database. |
| Cover Sheet Not Found | The server must be able to access the files it is being asked to fax. If it fails to locate a file (for example, because the file is located on a user's hard drive) it will return this error message. |
| Document "***filename***" Not Found | The server could not find one or more of the documents to be faxed. Check that the server has access to all documents referred to by the fax (including its cover sheet). |

| | |
|---|---|
| Error writing to Ami Pro file | The server had a problem merging with the Ami Pro file. Make sure there are no invalid fields in the Ami Pro document being faxed, and that the document is accessible to the server. |
| General Driver Error (Timeout) | The fax is queued, but it did not start sending. It is recommended that you reboot the system and reconfigure your faxmodems. |
| General Modem Error (Driver) | The fax could not be queued to the fax driver. This problem will generally be resolved by simply restarting Windows. |
| Merge File Not Output | The merge file for the fax could not be created. It may be in use by another user, or the user logged into the workstation used for processing may not have Write rights to the necessary directory. |
| Out Of Memory | The workstation running the server does not have sufficient memory to continue processing. Make sure you do not have several applications open on the workstation that is acting as a server. Close and restart Windows to free up memory. If the problem persists, take a look at the memory recommendations in the Automation Server Setup topic. (If this error occurs, you probably have your resource and memory thresholds for the server set too low. See Automation Server Parameters in on-line help for information on adjusting these settings.) |
| Phone Number Incomplete | The fax number was not complete. |
| Server Canceled | This error message appears when the fax was canceled at the server by a user. |
| Time Sync= ***XXX*** (where XXX is a user ID) | The fax sent by the user whose ID is displayed was sent from a computer whose clock setting differs from that of the server. Change the time on the user's workstation to match the rest of the system. |
| Unable To Create Merge File | This error message will occur if the directory in which the fax's .dat file is created is unavailable to the server. If this occurs, review the network security access of the user currently logged into the workstation running the server. |
| Unable To Run WordPro | This error message will occur when faxing if the directory in which one of the selected word processors resides is unavailable to the server. If |

| | |
|---|---|
| | this occurs, review the network mapping and security access of the user currently logged into the workstation running the server. |
| WordPro Not Active | The `Active` check box located in the Word Processor Edit screen has not been marked for the necessary word processor. |
| WordPro Path Invalid | The path to the word processor is invalid and it cannot be opened from that server. |

The following list of errors are due to a problem with the receiving fax machine:

| | |
|---|---|
| No Answer | Remote Fax Busy |
| Remote Error (MPS) - Multi-Page Sync error (error between pages) | Remote Error (EOP) - End Of Page not acknowledged |
| Error Setting Local ID | General Modem Error (Unknown) |
| FDCS Not found | No FHNG |
| Remote Error (Train) - Receiving machine will not reset for new page | Unable To Connect - Problem with phone line, or similar error |
| Command Not Acknowledged | Unknown Error |
| Connect Error | Error Negotiating With Remote |
| Timing Error - Different modem speeds | |

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Troubleshooting_Tools)<<1} Troubleshooting Tools

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_The_TeleMagic_Automation_Server)<<1} The TeleMagic Automation Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# Logging and Viewing Errors

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

From time to time a user may have a problem with a particular feature in a particular situation. TeleMagic gives you the opportunity to record and analyze what that user was doing when the error occurred. This may be especially helpful should you need technical support for that problem.

When such an error occurs, TeleMagic will pop-up a dialog box, asking the user to describe what they were doing when the error occurred. If the dialog box does not pop up, the user can still make a record of the problem by choosing **Log the System Status** from the **Help** menu. You can later view each individual error log by selecting **View System Log** from the **Help** menu. This will open a browse window, from which you can selectively choose and print reports.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Voluntarily_Log_a_Program_Error)<<1} To Voluntarily Log a Program Error:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_View_and_or_Edit_an_Error_Log_Entry)<<1} To View and/or Edit an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Delete_an_Error_Log_Entry)<<1} To Delete an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Printing_Error_Logs)<<1} Printing Error Logs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# To Voluntarily Log a Program Error:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½
ADVANCEX_Hint_for_Voluntarily_Logging_a_Program_Error)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Help** menu, select **Log the System Status**.

   The Log the System Status dialog box will appear.

2. Type notes on the error you experienced.

3. Click **OK**.

   The error logging program will record the system status,
   including your current environment.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_View_and_or_Edit_an_Error_Log_Entry)<<1} To View and/or Edit an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Delete_an_Error_Log_Entry)<<1} To Delete an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Printing_Error_Logs)<<1} Printing Error Logs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# To View and/or Edit an Error Log Entry:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Help** menu, select **View System Log**.

   A browse window will open, displaying all the current error logs.

2. Highlight the entry you want to examine in more detail, and press ENTER.

**or** Double-click the entry you want to view in more detail.

   The Error Log dialog box will open.

3. The basic error log information is displayed on the left-hand side of this screen, but you can use the buttons on the right to find out about the status of the user's environment when the error was logged, and the user's description of the error:

   - Click **Program Status** to view a record of the exact status of TeleMagic when the error occurred: which tables were open, which indexes were in use etc.
   - Click **Memory Variables** to see which TeleMagic memory variables were in use at the time of the error log.
   - Click **Data Structures** to see a description of all data tables which were open when the error occurred.
   - Click **CONFIG.SYS** to see a copy of the user's CONFIG.SYS file at the time of the error log.
   - Click **AUTOEXEC.BAT** to see a copy of the user's AUTOEXEC.BAT file at the time of the error log.
   - Click **WIN.INI** to see a copy of the user's WIN.INI file at the time of the error log.
   - Click **SYSTEM.INI** to see a copy of the user's SYSTEM.INI file at the time of the error log.
   - Click **TM.INI** to see a copy of the user's TM.INI file at the time of the error log.
   - Click **Misc. Info** to view miscellaneous information about the status of TeleMagic at the time of the error log.
   - Click **User Answer** to view the user's description of the error. This description can be edited or added to at this point.

4. When finished viewing and/or editing, click **OK** to exit the Error Log dialog box.

5. Double-click the Errors browse window's control box to exit the error logging system.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Voluntarily_Log_a_Program_Error)<<1} To Voluntarily Log a Program Error:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Delete_an_Error_Log_Entry)<<1} To Delete an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Printing_Error_Logs)<<1} Printing Error Logs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

## To Delete an Error Log Entry:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Help** menu, select **View System Log**.

   A browse window will open, displaying all the current error logs.

2. Highlight the entry you want to delete, and press ENTER.

**or** Double-click the entry you want to delete.

   The Error Log dialog box will open.

3. Click **Delete**.

   You will be asked to confirm your decision to delete.

4. Click **Yes**.

   The error log will be deleted. You will return to the Errors browse window.

5. Double-click the Errors browse window's control box to exit the error logging system.

**or** Press ESC.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Voluntarily_Log_a_Program_Error)<<1} To Voluntarily Log a Program Error:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_View_and_or_Edit_an_Error_Log_Entry)<<1} To View and/or Edit an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Printing_Error_Logs)<<1} Printing Error Logs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# Printing Error Logs

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

You have the option of printing either selected error logs, or the entire Error Report. Printing selective error logs allows you to view each log and only print those that you need.

The Error Report prints a complete detailed listing of every error in the system error log, either for all users or for a selected user or group of users. These reports can be *extremely* long, including not only which errors have been reported but also the status of TeleMagic and of the user’s hard- and software configuration at the time of the error. See System Reports for information on printing the Error Report.

We strongly recommend that you view each individual log before printing all of them, and selectively print only those logs that you need to see on paper.

## To Print an Error Log Entry:

1. From the **Help** menu, select **View System Log**.

   A browse window will open, displaying all the current error logs.

2. Highlight the entry you want to print, and press ENTER.

**or** Double-click the entry you want to print.

   The Error Log dialog box will open.

3. Click **Print**.

   The Windows-standard Print dialog box will open.

4. Click **OK**.

   The report will print on your default printer.

5. Click **OK** to exit the Error Log dialog box.

6. Click **OK** to return to the Errors browse window.

7. Press ESC or double-click the Errors browse window’s control box to exit the error logging system.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Voluntarily_Log_a_Program_Error)<<1} To Voluntarily Log a Program Error:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_View_and_or_Edit_an_Error_Log_Entry)<<1} To View and/or Edit an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Delete_an_Error_Log_Entry)<<1} To Delete an Error Log Entry:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# TeleMagic Command Line Parameters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

A command line is the information used to launch a program, usually consisting of the path and executable file name for the program. (An example of a command line would be F:\TM4\PROGRAMS\TM.EXE.)   A command line parameter is an additional instruction entered at the end of the path. Command line parameters can either be attached to an icon, which will cause the parameter to be effected every time the icon is used, or added to the end of the command line in a Run dialog box.

TeleMagic allows you to use these parameters to take shortcuts when starting the main program, when running an external rebuild, when starting Data Synchronization, and when starting the Automation Server.

Click here for a list of parameters to automate the main TeleMagic executable
Click here for a list of parameters to automate the external rebuild executable.
Click here for a list of parameters to automate the Automation Server executable.
Click here for a list of parameters to automate the Data Synchronization Server executable.

## To Attach Command Line Parameters to an Icon:

1. Right-click the shortcut on your desktop, select **Properties** from the menu, and select the Shortcut tab.
2. In the `Target:` field, type a space after the existing text and enter the parameter(s).
3. Click **OK**.

   The parameter will be used every time the program is launched with the icon until it is removed from the command line.

## To Use Command Line Parameters with the Run Dialog Box:

1. Click **Start** on the Taskbar and select **Run…** from the Start menu.

   The Run dialog box will open.

2. In the `Open:` field, type a space after the existing text and enter the parameter(s).

## Main Program Parameters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

If you are not familiar with using command line parameters, refer to the topic TeleMagic Command Line Parameters for instructions.

The following parameters, when added to the TeleMagic Enterprise TM.EXE launch sequence, allow you to start the program and have some processes automated. The parameters do not need to be in any particular order unless specified and multiple parameters can be used at one time, each separated by a space. Enter the entire parameter, including the / and = characters (if applicable):

| | |
|---|---|
| /U=***user_ID*** | automatically loads the user ID. If there is no password set, the program will bypass the Login dialog box. |
| /PW=***password*** | automatically loads the user's password. This parameter can only be used with the user ID parameter. If the user ID and password are valid, the program will bypass the Login dialog box. (Do not include a space in your password if you will be placing it in the command line parameter.) |
| /X | opens and locks TeleMagic for exclusive use. Opening an installation exclusive will result in increased performance of TeleMagic, however it restricts more than one user from opening it at the same time. By default, all single user installations are opened exclusive and all network installations are opened shared. You can override this default using your TM.INI file. (Click here for more information on including this in the TM.INI file.) Using this parameter will override both the default and the TM.INI and open TeleMagic exclusive.<br><br>**WARNING!**<br>Do not use the exclusive use parameter in a network installation if any other users will be using TeleMagic. |
| /S | opens TeleMagic shared. This is used in the same manner as the /X parameter to override the exclusive/shared defaults. If you have a network installation and have your TM.INI file set to open TeleMagic exclusive, you can use this to open it shared when necessary. |
| /NOSAVE | Overrides the **Save Settings on Exit** menu option. Saved settings will not be used on startup. |
| /SYSREG | Normally this parameter should only be used if directed to do so by technical support personnel.<br>Checks the \WINDOWS\SYSTEM directory (\WINDOWS\SYSTEM32 in Windows NT installations) for supporting files used by TeleMagic (a list of these files can be found in the TM.INI file under the heading [Windows]). If these files do not exist or are out-of-date, they are copied from the TeleMagic installation. TeleMagic then updates the registry entries for all files that can be registered.<br>This parameter is required the first time TeleMagic is started after |

reinstalling Windows. If a Workstation Setup (or node) is being used to run TeleMagic, delete the node, run the TM.EXE which is located on the server with the /SYSREG parameter, then reinstall the node.

This parameter may also be used if errors related to accessing these files are experienced.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Parameters)<<1} Automation Server Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Rebuild_Parameters)<<1} Rebuild Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Data_Sync_Parameters)<<1} Data Synchronization Server Parameters

# EXCLUSIVE/SHARED

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

Opening an installation exclusive will result in increased performance of TeleMagic, however it restricts more than one user from opening it at the same time. By default, all single user installations are opened exclusive and all network installations are opened shared. You can override this default using your TM.INI file.

Although you can use the /X and /S command line parameters to override the defaults and activate exclusive or shared mode, if you will always be using one or the other you can add the following line to the TM.INI file:

EXCLUSIVE=Y

(for exclusive use)

or

EXCLUSIVE=N

(for shared)

**WARNING!**
Editing an .INI file is an advanced feature that should be handled by the system administrator or a qualified TeleMagic reseller.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_TeleMagic_Command_Line_Parameters)<<1}
TeleMagic Command Line Parameters
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½TM_TM_INI)<<1} TM.INI

# Automation Server Parameters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

If you are not familiar with using command line parameters, refer to the topic TeleMagic Command Line Parameters for instructions.

The following parameters, when added to the Automation Server's TMAUTSRV.EXE launch sequence, allow you to start the Automation Server and have some processes automated. The parameters do not need to be in any particular order unless specified and multiple parameters can be used at one time, each separated by a space. Enter the entire parameter, including the / and = characters (if applicable):

| | |
|---|---|
| /P | goes directly into process mode on the server chosen with the /S= parameter (below). If you have no default server selected, you will go into Monitor mode. |
| /R | runs a rebuild on the fax servers and queues. |
| /PW=***password*** | allows you to enter the fax server's password. Type the password directly after the "=" sign. Use the password in conjunction with other parameters, always remembering to leave a space between each parameter. |
| /S=***server_ID*** | allows you to enter the fax server's ID. Type the ID directly after the "=" sign. |
| /Q=***queue_#*** | allows you to enter the fax queue that will be displayed when you enter the fax server. Type the queue number directly after the "=" sign. |
| /M | allows you to automatically configure the modem when you enter the server. |
| /MTO=***seconds*** | Allows you to specify how long before a modem times out. |
| /RES=***percent*** | Resource threshold. Enter the percent as a number with no percent sign. If the resources available to Windows fall below this number, Windows will restart. |
| /MEM=***megabytes*** | Memory threshold. If the amount of available memory falls below this number, Windows will restart. |
| /Restart=***hours*** | Allows automatic restarting of Windows after a specified number of hours. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Main_Program_Parameters)<<1} Main Program Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Rebuild_Parameters)<<1} Rebuild Parameters
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Data_Sync_Parameters)<<1} Data Synchronization Server Parameters

# Data Synchronization Server Parameters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

If you are not familiar with using command line parameters, refer to the topic TeleMagic Command Line Parameters for instructions.

The following parameters, when added to the Data Synchronization Server launch sequence, allow you to start the program and have some processes automated. The parameters do not need to be in any particular order unless specified and multiple parameters can be used at one time, each separated by a space. Enter the entire parameter, including the / and = characters (if applicable):

You can use the following command line parameters with the central and satellite (DSSERVER.EXE) and remote (DSREMOTE.EXE) installations of Data Synchronization Server:

| | |
|---|---|
| /U=***user ID*** | This parameter will fill in the specified User ID at the Login dialog box when Data Synchronization Server opens. Enter a valid TeleMagic three character User ID after the equal sign. |
| /PW=***user password*** | This parameter will fill in the specified password at the Login dialog box. (It must be used with the /U= parameter.) Enter the TeleMagic password for the user selected with the /U= parameter after the equal "=" sign. If both the User ID and password are valid, the program will bypass the Login dialog box. |
| /R | This will launch Data Synchronization Server and perform a rebuild. |
| /NDAYS=***# of days*** | If you are performing a rebuild, this parameter will cause all transactions older than the specified number of days to be deleted. Enter the number following the equal "=" sign. (This parameter must be used with the /R parameter.) |
| /Notitle | This can be used to load Data Synchronization Server with no opening title (the logo that appears when the program first launches) . This should be used on systems that have experienced video driver conflicts when opening Data Synchronization Server. |

You can use the following parameters at the central and satellite installations of Data Synchronization Server only:

| | |
|---|---|
| /IDLETIME=***minutes*** | Use this command line parameter when starting Data Synchronization Server to specify the amount of time DSS stays idle between processes. Enter the number of minutes after the equal sign. |
| /S=***server ID*** | This parameter will launch Data Synchronization Server with the specified server already selected. Enter a valid three character Server ID for a server previously set up in Data Synchronization Server after the equal "=" sign. |
| /P | This parameter will cause Data Synchronization Server to be launched |

directly in process mode. (If you would like more information on process mode, see the chapter Synchronizing Your Data.) This can be used with or without the /S= parameter. If it is used without /S=, the last server selected on the workstation will be used.

| | |
|---|---|
| /SITE=***site_ID(s)*** | This parameter will specify that only the listed sites should be processed. Enter the three character Site ID for each site that you would like processed after the equal "=" sign, separated by commas. (e.g., /SITE=xxx,yyy). |

You can use the following parameters at satellite installations and remote sites only:

| | |
|---|---|
| /NOTRANS | This parameter will cause the site to ignore transactions when processing for the server and include all records. (If this is used at a Satellite Office, it will only be applied to packets for the central. The packets for the Satellite's remotes will continue to respect database preferences.) |
| /TD=***date*** | This sets a transaction cutoff date at a remote site. All transactions from the specified date and later will be included in the outgoing packet. The date entered must be in the same format as the site's date format, and the date separator must be the hyphen (-) character. |

You can use the following parameters at the remote installations of Data Synchronization Server only:

| | |
|---|---|
| /Script=***script_name*** | This parameter is used to launch scripts at the remote site. When used, the specified script will run. Enter the desired script name after the equal "=" sign. If there are spaces in the script name, use an underscore "_" character in place of the space. Example: remote_script_1. |
| /ScriptX=***Script_name*** | Similar to the /Script= parameter, this parameter will launch the specified script, then exit Data Synchronization Server when the script has finished running. |
| /O | If there is a packet existing in the outbox at the remote site, when you process the site you will receive a message giving you the option of overwriting this packet or appending to it. If you know there is a packet in the outbox, you can bypass this message. This parameter will cause the packet in the outbox to be overwritten with the new packet created during processing. |
| /U | This parameter is similar to the /O parameter, except that it will cause the packet to be updated with new changes without overwriting the existing data in the packet. |
| /RPLMEMO | This will cause memo fields at the remote site to be overwritten with incoming data in memo fields at the central site. |
| /X | Exits the program at remote sites after processing. |
| /REMDETACH | This parameter is used for remote sites that have been detached from |

their server, but for some reason did not receive the packet detaching them. Refer to the Data Synchronization Server Addendum or Data Synchronization Server's on-line help for more information.

Sample command line parameter: C:\TM4\PROGRAMS\DSSERVER.EXE /U=JRC /S=DS1 /P

(This will launch Data Synchronization Server at the central site, log in the user JRC, select the server DS1, and begin processing.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Main_Program_Parameters)<<1} Main Program Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Rebuild_Parameters)<<1} Rebuild Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Parameters)<<1} Automation Server Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(ds.hlpï¿½DS2_Command_Line_Parameters)<<1} DSS Command Line Parameters

# Rebuild Parameters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

If you are not familiar with using command line parameters, refer to the topic TeleMagic Command Line Parameters for instructions.

The following parameters, when added to the external rebuild REBUILD.EXE launch sequence, allow you to start the rebuild and have some processes automated. The parameters do not need to be in any particular order unless specified and multiple parameters can be used at one time, each separated by a space. Enter the entire parameter, including the / and = characters (if applicable):

| | |
|---|---|
| /R | This will bypass the Rebuild dialog box and perform the rebuild directly with the default settings. |
| /RE | This parameter will bypass the Rebuild dialog box and delete the error log. Use it in place of the /R parameter. (See the Logging and Viewing Errors topic for more information on the error log.) |
| /RC | This will bypass the Rebuild dialog box and recalculate calculated fields. Use it in place of the /R parameter. |
| /REC | This will bypass the Rebuild dialog box, recalculate calculated fields, and delete the error log. Use it in place of the /R parameter. |
| /PRNTERR | This is used to limit the default rebuild report to only detail any errors are encountered during rebuild. This parameter must be used with the /R, /RE, /RC, or /REC parameter. (Example: /R /PRNTERR) |
| /NOREP | This will turn off the default report option. This parameter must be used with the /R, /RE, /RC, or /REC parameter. (Example: /R /NOREP) |
| /T=***time*** | Allows you to specify the time the rebuild should commence. Enter the time in 24-hour format directly following the equal sign. This parameter must be used with the /R, /RE, /RC, or /REC parameter. (Example: /R /T=18:00 will run the rebuild at 6:00p.) If you set a time that has already passed, TeleMagic will wait until that time tomorrow to perform the rebuild.) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Main_Program_Parameters)<<1} Main Program Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Parameters)<<1} Automation Server Parameters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Data_Sync_Parameters)<<1} Data Synchronization Server Parameters

# The Product Registration Process

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Registrationï¿½ ï¿½ ï¿½ )<<1}

There are two methods available to register TeleMagic:

- You may register by telephone between the hours of 8 a.m. and 5 p.m. Pacific time, Monday through Friday. (Refer to the Register by Phone topic for details.)

- You may register by fax or e-mail any time. (Refer to the Register by Fax or Email topic for details.)

# To Register by Phone

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Registrationï¿½ ï¿½ ï¿½ )<<1}

1. To register your copy of TeleMagic, launch TM.EXE and select **Yes** when asked if you would like to register.

**or** If your installation of TeleMagic is already registered and you would like to add additional users to TeleMagic, select **File**, **Register**.

   A Product Registration dialog box will open.

   If this is an evaluation or unregistered copy of TeleMagic, the `Company Name` and `User Name` fields will become available. You may use these fields to change the registration information that was entered during installation. (Once TeleMagic is registered, you will not be able to modify this information.)

2. If you would like to change the company name entered during installation, enter the correct name in the `Company Name` field.

3. If you would like to change the user name to whom the product is registered, enter the correct user in the `User Name` field.

4. Select the `Call In Registration` radio button.

5. Click **Next** to proceed.

   The Second Product Registration dialog box will open.

6. Enter the serial numbers for all of the products you are registering in the fields provided. (If this is first time registration, you must enter the TeleMagic serial number in the first field.)

   The product you are registering will appear next to the serial number. (Click here for more information if the product does not appear and you get an error instead.)

7. Click **Next** when you have entered the serial number(s).

   The Third Product Registration dialog box will open.

8. Call the phone number displayed on the screen to register the serial number you have entered. Be prepared to provide the serial number(s) and the Registration Code (displayed in the center of the screen).

   You will receive an authorization code.

9. Enter the Authorization Code in the field provided.

10. Click on **Next** when the Authorization Code has been entered.

The Save Registration Information dialog box will open detailing what you are registering.

11. If the information displayed is correct, click **Finish** to complete the registration process.

**or** If the information displayed is not correct, click **Back** to return to previous screens where you can correct any errors.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_The_Product_Registration_Process)<<1} The Product Registration Process

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Register_by_Fax)<<1} To Register by Fax

# Invalid Serial Numbers

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Registrationï¿½ ï¿½ ï¿½ )<<1}

There are two possible reasons a serial number will not be accepted during registration: either the serial number is invalid, or it is not compatible with your current installation of TeleMagic.

## Invalid Serial Number

This message will appear next to the serial number field if the number you have entered is not a valid TeleMagic serial number. Double-check the number to make sure you have entered it exactly as it appears on your Key Card. Make sure that you have not entered the number 0 using the letter O. If the serial number has been entered correctly, contact TeleMagic or your reseller for assistance.

## Incompatible Serial Number for this Installation

This message will appear next to the serial number field if the number you have entered is not valid for your installation of TeleMagic. Some examples of incompatible serial numbers include the following:

- If you have already registered your TeleMagic installation, you will not be able to enter a first time installation or upgrade serial number.

- You will not be able to enter a first time installation serial number if you have performed an upgrade, or an upgrade serial number if you have performed a first time installation.

- Professional to Enterprise serial numbers can only be entered on an installation of TeleMagic Enterprise that was upgraded from an installation of TeleMagic Professional. Additionally, you will only be able to use Professional to Enterprise user packs on the number of users that originally existed in TeleMagic Professional. After that number has been reached, you will use standard TeleMagic user upgrade serial numbers.

- You will only be able to enter user upgrade serial numbers for the number of users who existed in your installation of TeleMagic prior to upgrade.

- You will not be able to enter a single user pack serial number on an installation of TeleMagic that already has 5 or more users. (Single User packs are only valid on network installations with less than 5 users.)

If you have received an incompatible serial number, contact your reseller or TeleMagic for assistance.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½ADVANCED_The_Product_Registration_Process)<<1}

# To Register by Fax or E-mail

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Registrationï¿½ ï¿½ ï¿½ )<<1}

Registering by fax is a two-part process: first you must enter your serial numbers and generate a printout of your registration information to fax to TeleMagic, then you must enter the authorization code that is faxed back to you from TeleMagic.

## To Receive an Authorization Code:

1. To register your copy of TeleMagic, launch TM.EXE and select **Yes** when asked if you would like to register.

**or** If your installation of TeleMagic is already registered and you would like to add additional users to TeleMagic, select **File**, **Register**.

A Product Registration dialog box will open.

If this is an evaluation or unregistered copy of TeleMagic, the `Company Name` and `User Name` fields will become available. You may use these fields to change the registration information that was entered during installation. (Once TeleMagic is registered, you will not be able to modify this information.)

2. If you would like to change the company name entered during installation, enter the correct name in the `Company Name` field.

3. If you would like to change the user name to whom the product is registered, enter the correct user in the `User Name` field.

4. Select the `Fax Registration` radio button to fax in your registration information.

**or** Select the `Email Registration` radio button to send your registration information through e-mail.

5. Click **Next** to proceed.

The Second Product Registration dialog box will open.

6. Enter the serial numbers for all of the products you are registering in the fields provided. (If this is first time registration, you must enter the TeleMagic serial number in the first field.)

The product you are registering will appear next to the serial number. (Click here for more information if the product does not appear and you get an error instead.)

7. Click **Next** when you have entered the serial number(s).

The Third Product Registration dialog box will open detailing what you are registering.

8. Verify that the information is correct and click **Next** to proceed.

**or** Click **Back** to return to the previous screen to add additional product serial numbers or adjust any of the existing information.

The User Information dialog box will open. (This dialog box will contain a **Print** button if you are faxing registration, or a **Done** button if you are e-mailing registration.)

9. Enter your name, address, telephone, e-mail address, and dealer information in the fields provided. (Your Dealer ID can be found on your Key Card.)

10. If you are sending your registration by e-mail, click **Done** and skip to step 14.

**or** If you are registering by fax, click **Print** to print the information on your default printer.

If you are faxing your registration information, a message will appear confirming that you are ready to print.

11. Select **Yes** to print the registration information.

**or** Select **No** to return to the User Information screen where you can adjust your information or click **Back** to change your serial number information.

When you click **Yes**, the Windows Print dialog box will appear.

12. Click **OK** to send the registration information to your printer.

A message will appear asking if the information printed.

13. Select **Yes** if the registration information was successfully printed.

**or** Select **No** to return to the Windows Print dialog box where you can click **Setup** to adjust your printer settings.

14. Fax the document to TeleMagic at the number indicated on the registration form.

**or** If you are registering by e-mail, a message will appear giving the path and file name of the file that you should e-mail to TeleMagic. Click **OK** to acknowledge the message and include the specified file as an attachment in an e-mail to TeleMagic at Register@TeleMagic.Com.

Your authorization code will be sent to you via return fax or e-mail. Your product is not yet registered. If you have added additional users, they will not be available until you enter your authorization code. If you are registering your TeleMagic installation you will continue to be asked if you would like to register each time you launch

TeleMagic until you enter your authorization code.

## To Enter Your Authorization Code:

1. Launch TM.EXE and select **Yes** when asked if you would like to register.

**or** If your installation of TeleMagic is already registered and you are adding additional users to TeleMagic or additional Data Synchronization Server sites, select **File**, **Register**.

A Product Registration dialog box will open.

2. Select the `Enter authorization code or change registration information` radio button.

3. Click **Next** to proceed.

You will be asked if you would like to enter your authorization code.

4. Select **Yes**.

The Product Authorization dialog box will open.

5. Enter your Authorization Code in the field provided.

The Save Registration dialog box will open.

6. If the information displayed is correct, click **Finish** to complete the registration process.

**or** If the information displayed is not correct, click **Back** to return to previous screens where you can correct any errors.

Once the authorization code has been successfully entered, your TeleMagic installation will be registered and any users you have added will be available for your use.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_The_Product_Registration_Process)<<1} The Product Registration Process

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To Register_by_Phone)<<1} To Register by Phone

# Installing a Node

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Troubleshootingï¿½ ï¿½ ï¿½ )<<1}

TeleMagic offers a local workstation installation option (node installation) which can copy the system files from the global directory (the directory containing your TeleMagic files) on the network drive to a local hard disk drive. Users will still be accessing the common information on the network, but most of the processing will take place locally. Setting your installation up in this manner means that TeleMagic will run faster for individual users, though it takes up more room on the user's computer. If you want to optimize TeleMagic, it is recommended that you perform workstation setup on each workstation that will be used to access TeleMagic.

## To Install TeleMagic on a Network Workstation:

You must have approximately 8 MB free disk space available on each workstation's hard disk for storing TeleMagic if you are using this node option.

1. Log into the workstation you would like to use to run TeleMagic.

2. Open TeleMagic if it is not already running.

3. From the **File** menu, select **Workstation Setup**.

   A message will appear asking you to confirm your decision to run workstation setup.

4. Select **Yes** to continue.

**or** Select **No** to abort. You will be returned to TeleMagic.

   The Choose Destination Location dialog box will open.

5. Select the directory on your local drive where you would like the node installed. If you select an existing directory, make sure that it is currently empty; if you enter a new directory name, TeleMagic will create it.

   The Select Program Folder dialog box will open. This allows you to select the program folder where your node's TeleMagic icon should be installed. (This icon will point to the TM.EXE on the user's hard drive, as opposed to the TM.EXE on the network drive.)

6. If you would like to accept the default TeleMagic For Windows folder, click **Next>**.

**or** If you would like to create a new folder to contain your icon, type the folder name in the `Program Folders:` field and click **Next>**.

   The User and Password Entry screen will open.

7. If you would like to attach command line parameters with your User ID and password to the icon referred to in step

6, enter your three character User ID in the `User ID:` field and your password in the `Password:` field and click **Next>**. (Refer to Main Program Parameters for more information on these parameters.)

You will be asked if you are ready to copy files.

8. Select **Yes** to proceed.

**or** Select **No** to return to the User and Password Entry screen.

The node files will be copied to your local installation. When it is finished, a Workstation Setup Complete message will appear.

9. Click **Finish**.

At this point you are still running the global installation of TeleMagic. You will be prompted to exit TeleMagic now.

10. Select **Yes** to close TeleMagic and launch TM.EXE from the node directory specified in step 5 or the icon created in step 6.

When you launch the workstation installation the first time, TeleMagic will copy the necessary files from the global directory (the main network directory where your TeleMagic files are located). When the files are copied, your workstation installation is ready to use.

11. If you are the system administrator, repeat this process for each workstation in your system. (Perform as much testing on each user's computer as you have time for, especially on the first one or two you test. e.g., Open a database, scroll through some records, and open a linked word processing document.)

If you update or upgrade your global installation of TeleMagic, any node installations must be updated as well. This process is automatic and occurs when the node is first opened. The user will receive a message confirming whether to update the node. If **No** is selected, the update will not proceed and TeleMagic will not open. When running the node update, all other instances of TeleMagic must be closed.

# Setting the Calculation Order for Calculated Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

Calculated fields are automatically filled in based on an expression. For example, on Level 3 of the Documentation Database, there is a calculated field that checks to see if the customer purchased a 120 day warranty. If there is a warranty, it calculates and displays the warranty expiration date by adding 120 days to the date of purchase. You can use fields, functions, and variables when building the expression for your calculated field. You can also use other calculated fields. If you have calculated fields based on other calculated fields, the order in which they are calculated becomes important.

For example, a database may have a field for charges and a field for payments. There is one calculated field that displays each customer's current balance. There is a second calculated field that gives a warning if balance field shows that the customer owes more than $1000. When the data on which these calculated fields are based is changed, the calculated fields are updated to reflect the change the next time they are recalculated. When TeleMagic fills in these fields, it needs to know in what order they should be calculated. For example, a customer may make a purchase that puts his amount due over $1000. Before it is recalculated, the balance field will still display the amount that was owed before the most recent purchase. If the warning field is calculated first, when it reads the balance field it will think that the balance due is under $1000. For this reason, it is important that the balance field gets calculated first; then the warning field will be correctly updated.

If you have more than 2 calculated fields in a database, TeleMagic lets you set the order in which they should be calculated.

•

## To Set the Calculation Order:

1. From the **File** menu, select **Add / Edit Fields**.

   The Edit the Field List dialog box will open.

2. Click **Set Calculation Order**.

   The Calculation Order dialog box will open.

   This dialog box will display all of the calculated fields for the current level. When a field is highlighted, the calculation expression is displayed in the box at the bottom of the screen.

3. To change the order in which the fields are calculated, click the mover box next to any field and drag it into its new position. Remember, if a field is used in another calculation, it needs to be calculated first.

4. When you are satisfied with the order, click **OK**.

   You will be returned to the Edit the Field List dialog box.

5. Click **OK**.

# TeleMagic Internet Mail Parameters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Advancedï¿½ ï¿½ ï¿½ )<<1}

/CLEANREG=??? This parameter is used to remove a user’s mailbox from a workstation. When a mailbox is established, an entry is made in the Windows Registry. This entry is not removed when the user is deleted from TeleMagic. To remove the mailbox, run TMMAIL.EXE from the Windows Run dialog box using this parameter. Substitute the user’s ID for the question marks. For example:

C:\TM4\PROGRAMS\TMMAIL.EXE /CLEANREG=TST

Note that there must be a space between TMMAIL.EXE and /CLEANREG. More than one mailbox can be established on any workstation, but they must have unique user Ids. This process must be repeated for all mailboxes that have been established on the workstation that needs to be removed, and on all workstations where any individual may have established mailboxes under the same ID.

## Hint for User Monitor

If users exit TeleMagic improperly, for example if the operating system locks up and they are forced to reboot, the User Monitor can be used to determine if the TeleMagic user has left files open. If the user still appears on the list even though he or she is not logged into TeleMagic, files have been left open.

# Hint for About Screen

There is a large selection of add-on products that have been developed for use with TeleMagic. Contact you reseller or TeleMagic's customer service department for information on further tailoring TeleMagic to your business. There is an optional help file included on your installation disk which contains information about several providers of specialized enhancements for your TeleMagic installation. See the **Accessories and Enhancements** topic for more information.

## Hint for Automation Server Troubleshooting

If you tend to run low on resources and there is a chance that the Automation Server will need to restart Windows, place the Automation Server icon in your StartUp Program Group and use parameters to re-open your server and queue in Process mode. (Make sure you take into account automating the Windows login processes as well.)

## Hint for Voluntarily Logging a Program Error

If you want to save the error log, but not record your current environment information, click over the `Ctrl+Tab to Exit` on-screen message.

## Note for Entering Error Description

It is possible to edit this description later. (See To View and/or Edit an Error Log Entry for instructions.)

## Note for Setting the Calculation Order for Calculated Fields

This feature is level specific. All calculations for Level 1 are performed first, then all calculations for Level 2, and finally all calculations for Level 3. Since you cannot use lower level data in a calculation (i.e., you cannot include a Level 2 field in a Level 1 calculation), the calculation order across levels is not an issue.

## Note for Step 5

Clicking **Cancel** at this point discards *all* changes that have been made since you opened this dialog box, including changes to the calculation order.

## To Register by Fax or E-mail—Note for Step 13

If you have not yet faxed in your registration printout and you discover that you need to adjust your registration information after it has printed, you can access the **Register** option on the **File** menu to edit your selections. Select the `Enter authorization code or change registration information` radio button, then select **No** when you are asked if you would like to enter your authorization code. You will be returned to the Product Registration screen where you can adjust your selections as necessary.

## Hint for Rebuild Parameters

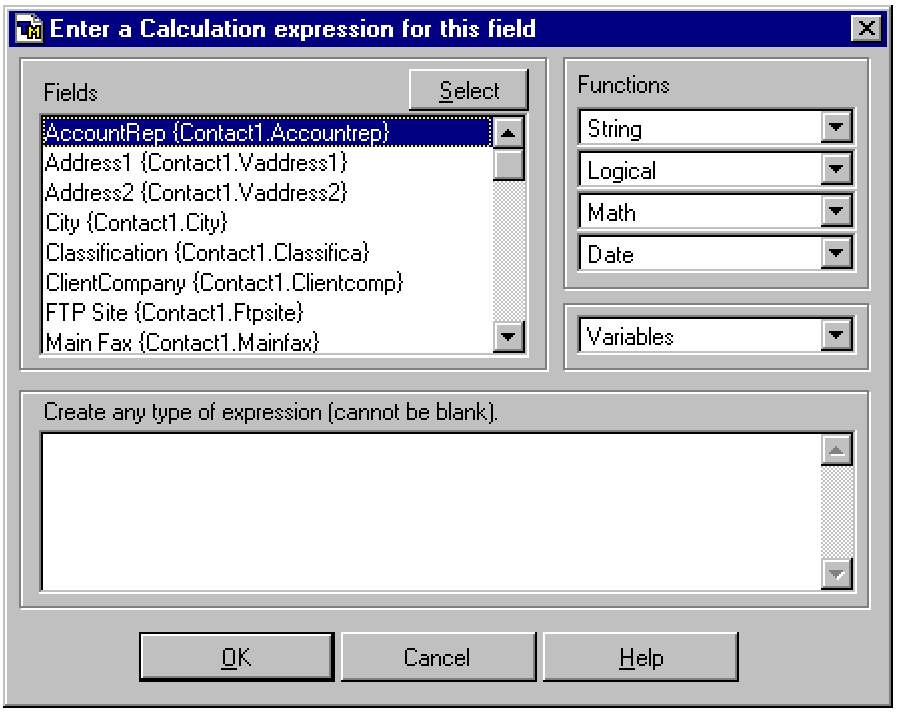
If you would like to create an .INI file to perform these functions without using command line parameters, see REBUILD.INI.

# Expression Builder

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

The Expression Builder is a dialog box that appears whenever you need an expression to complete a task. Expressions are used to define field defaults, roll-up fields, and calculated fields; set up filters, indexes, and reports, and wherever you need TeleMagic to make a decision about which data to use.

The standard Expression Builder dialog box is illustrated here:




**The Expression Builder Dialog Box**

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The Expression Builder allows you to create expressions that, when evaluated, generate a value of Character, Numeric, Logical or Date type. An expression can be as simple as a field name, a single variable or a number, or it can be very complex. In general, expressions are formed with the following elements:

- Field names
- Memory variables
- Constants (or literals)
- Functions and operators

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder_Dialog_Box_Overview)<<1}

Expression Builder Dialog Box Overview

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# Expression Builder Dialog Box Overview

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

To create an expression in the Expression Builder dialog box, type or choose the field names, variables, operators and functions you need to build the expression. The Expression Builder contains several controls to help you create the expression. These controls are explained in the following topics:

Functions Pop-Up List
Fields Pop-Up List
Variables Pop-Up List
Expression Line and Expression

When you are finished building the expression, click **OK** to confirm it.

If there are any problems with the expression, an error message appears. To erase the error message, click the mouse button or press any key *except* function keys, CTRL or SHIFT.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## Functions

At the top of the Expression Builder dialog box in the `Functions` area are four pop-up controls for String, Logical, Math and Date. These pop-up lists contain the functions and operators that you can use to build expressions with each type of data.

For a description of each option in each list, see Functions Overview by Type.

## Fields

The Fields list displays the fields in the active table.

To move a field into the expression box, double-click on it.

## Variables

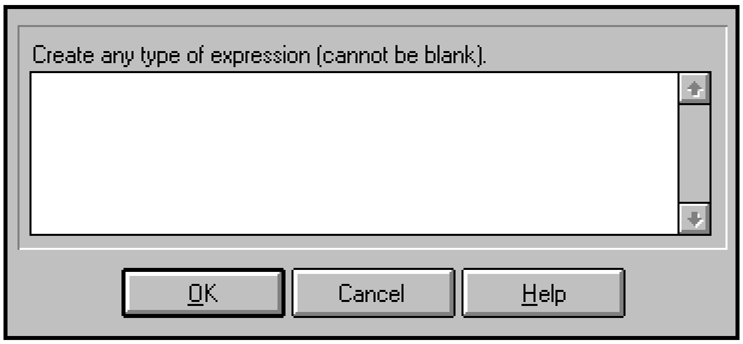
The Variables list displays the available system memory variables. Because variables read system information that may or may not be applicable at the time the expression is executed, it is highly recommended that you use caution when using system variables in expressions. If you are not familiar with what a variable returns, or under what circumstances it is and is not applicable, it is not recommended that you include the variable in your expression or you may encounter errors. Documentation for the system memory variables is available by contacting your TeleMagic Reseller.

Following is a list of common variables and their meaning:

| **Variable** | **Information Generated** |
|---|---|
| cUserID | Your three character user ID |
| cUserName | Your user name |
| cCurDB | The name of the current database |
| cDir_Database | The directory for the current database |
| cDir_Global | The TeleMagic global directory, which contains your TeleMagic files |
| cContLevel | The controlling level of contact data (1, 2, or 3) as defined in Contact preferences |
| cCurFilter | The name of the current filter |
| cCurLevel | The currently selected level of contact data (1, 2, or 3) |
| cContact[1] - [3] | The names of the contact levels of the current database. This may be used with cContLevel and cCurLevel as follows:<br>cContact [val(cContLevel)] - the name of the default level<br>cContact [val(cCurLevel)] - the name of the currently selected level |
| cStndAddr[1] - [5] | The 1st through 5th lines of the standard address |

## Expression Line and Expression Box

Below the six function pop-up controls is the expression line, and below that is the expression box. The expression line reminds you what kind of expression you are creating, and the expression box displays your expression as you build it. Each time that you select a function, a variable, or a field, it is displayed automatically at the end of any expression already entered in the Expression Builder dialog box, followed by a plus sign (+):




**Sample Expression Line and Expression Text Box**

Functions and operators can be edited in the expression box as necessary. To edit an entry in the Expression text box, move to the box by clicking in it with the mouse, or tabbing to it. Use standard editing techniques.

When you are building complex expressions be sure to delete any unnecessary plus signs after each function. Once you have finished building an expression, the final automatically-inserted “+” is trimmed off, leaving you with a valid expression.

# Expression Builder Functions Overview by Type

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

String Functions
Math Functions
Date Functions
Logical Functions
Activity Functions
Zip Code Related Functions

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## Expression Builder: String Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

String functions return a character string. For example, to create a function to extract the User ID from the Start field would require a string function.

| String Function | Purpose |
|---|---|
| "text" | Enters "" into your expression with the cursor positioned in between. Allows you to begin immediately typing text into your expression. |
| + | Character string concatenation (two strings are joined together). |
| - | Character string concatenation (trailing blanks are moved from the end of the first string to the end of the second string). |
| $ | Determines whether a character string is contained inside another character string or memo field. |
| ASC(expC) | Returns the ASCII code for the leftmost character in a character string. |
| ALLTRIM(expC) | Returns the specified character string with leading and trailing blanks removed. |
| AT( , , ) | Returns the first position from the left (as an integer) of the first occurrence of a character string within another character string or memo field. |
| ATC( , , ) | Returns the left position (as an integer) of the first occurrence of a character string within another character string (just like AT(,,)), without regard for the case of these two expressions. |
| CHR(expN) | Returns the character associated with the specific numeric ASCII code. |
| CHRTRAN( , , ) | Translates a character string using two other strings as translation tables. |
| LEFT(expC, , ) | Returns a specified number of characters from a character string, starting with the leftmost character. |
| LEN(expC) | Returns the number of characters in a character string. |
| LOWER(expC) | Returns a specified character string in lower case letters. |
| LTRIM(expC) | Returns the specified character string with leading blanks removed. |

| | |
|---|---|
| MAX( , ,[...]) | Returns the highest expression (ASCII value, numeric value or the latest date) from a list of character, numeric or date expressions. |
| MIN( , ,[...]) | Returns the lowest expression (ASCII value, numeric value or the earliest date) from a list of character, numeric or date expressions. |
| NpdSelect( , , , ) | Returns the specified portion of a memo field. |
| NpdMerge(,,,) | Combines the contents of two memo fields and sorts them by date. |
| OCCURS( , ) | Returns the number of times a character string occurs within another character string. |
| PADC(expC, , ) | Returns the specified expression padded on both sides with a specified character. |
| PADL(expC, , ) | Returns the specified expression padded on the left side with a specified character. |
| PADR(expC, , ) | Returns the specified expression padded on the right side with a specified character. |
| PROPER(expC) | Returns the specified character string with each word having the initial letter capitalized and the remaining characters lowercase. |
| RAT( , , ) | Returns the value of the first position of a given character search string in a character string, starting from the right, (opposite of AT(,,)). |
| REPLICATE( , ) | Returns a character string that contains a specified character string repeated a specified number of times. |
| RIGHT(expC,expN) | Returns the specified number of rightmost characters from a character string. |
| RTRIM(expC) | Returns the specified character string with all trailing blanks removed. |
| SPACE(expN) | Returns a character string composed of a specified number of spaces. |
| STR(expN, , ) | Returns the character string equivalent to a specified numeric expression. |
| STRTRAN( , , ) | Searches a character string or memo field for occurrences of a second character string, and then replaces each occurrence with a third character string. |
| STUFF( , , , ) | Returns a character string created by replacing a specified number of characters in a character string. |
| SUBSTR( , , ) | Returns a specified number of characters from the given character |

| | |
|---|---|
| | string. |
| TMPROPER(expC) | Formats a character string with the appropriate capitalization. |
| TXTMerge(,,,) | Returns the results of combining two sets of text strings. Optionally sorts the resulting set. |
| TYPE(exp) | Returns the data type of the expression (character, numeric, logical, data and memo). |
| UPPER(expC) | Returns the specific character string in uppercase. |
| WPLOC( ) | Returns storage location of a word processing description (user, global, database). |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# Expression Builder: Math Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ï¿½ï¿½ )<<1}

Math functions perform a calculation. For example, to add a field to a report that sums a column would require a math function.

| Math Function | Purpose |
|---|---|
| + | Addition. |
| - | Subtraction. |
| * | Multiplication. |
| / | Division. |
| ^ | Exponentiation. |
| % | Percentage. |
| ABS(expB) | Returns the absolute value of a specified numeric function. |
| ACOS(expN) | Returns the arc cosine of a specified numeric expression. |
| ASIN(expN) | Returns the arc sine of a specified numeric expression. |
| ATAN(expN) | Returns the arc tangent of a specified numeric expression. |
| ATN2( , ) | Returns the arc tangent from the specified sine and cosine values. |
| CEILING(expN) | Returns the nearest integer that is greater than or equal to the specified numeric expression. |
| CHILDCOUNT(exp) | Returns the number of child records found for the current contact record. |
| CHILDSUM(expN,exp) | Returns the sum of a numeric field found on the child level. |
| COS(expN) | Returns the cosine of an angle. |
| DTOR(expN) | Converts degrees to radians. |
| EXP(expN) | Returns the value of *ex*, where *x* is the specified numeric expression. |
| FLOOR(expN) | Returns the nearest integer less than or equal to the specified numeric |

| | |
|---|---|
| | expression. |
| FV( , , ) | Returns the future value of an investment. |
| INT(expN) | Returns the integer portion of numeric expression. |
| LOG(expN) | Returns the natural logarithm (base e) of the specified numeric expression. |
| LOG10(expN) | Returns the common logarithm (base 10) of the specified numeric expression. |
| MAX( , , [...]) | Returns the highest expression (ASC II value, numeric value, or latest date) from a list of character, numeric or date expressions. |
| MIN( , , [...]) | Returns the lowest expression (ASC II value, numeric value, or earliest date) from a list of numeric, or date expressions. |
| MOD( , ) | Returns the remainder from a division operation. |
| PAYMENT( , , ) | Returns the amount of each periodic payment on a fixed interest loan. |
| PI() | Returns the numeric constant $\Pi$ |
| PV( , , ) | Returns the present value of an investment. |
| RAND( ) | Returns a random number between 0 and 1. |
| ROUND(expN, ) | Returns a numeric expression rounded to a specific number of decimal places. |
| RECNO( ) | Returns the record number. |
| RTOD(expN) | Converts radians to degrees. |
| SIGN(expN) | Returns -1 if the numeric expression is negative or 1 if the numeric expression is positive. |
| SIN(expN) | Returns the sine of an angle. |
| SQRT(expN) | Returns the square root of the specified numeric expression. |
| TAN(expN) | Returns the tangent of an angle. |
| VAL(expC) | Returns a numeric expression from a specified character string composed of numbers. |

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# Expression Builder: Date Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

Date functions return a date. If you wanted to return the date of the next activity linked to a contact, you would use a date function.

| Date Function | Purpose |
|---|---|
| CDOW(expD) | Returns the name of the day of the week from a given date expression. |
| CMONTH(expD) | Returns the name of the month for a given date. |
| CTOD(expC) | Converts a character string to a date expression. |
| DATE( ) | Returns the current system date |
| DAY(expD) | Returns the numeric day of the month for a given date. |
| DMY(expD) | Returns a date expression in Day Month Year format. |
| DOW(expD) | Returns the numeric day of the week for a given date. ( 1 through 7 ) |
| DTOC(expD) | Returns a character type date for a specified date expression. |
| DTOS(expD) | Returns a character string date in YYYYMMDD format for a specified date expression. |
| DTSTAMP( ) | Returns the string used to stamp memo fields; date, time, and User ID sepreated by dashes. |
| FirstActivity( , , , ) | Returns the completion date of the first completed activity that meets the specified parameters for the current contact. |
| GOMONTH(expD) | Returns the date that is a specified number of months before or after a given date. |
| 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. |
| LastActivity( , , , ) | Returns the date of the latest complete activity that meets the specified parameters for the current contact. |
| MAX( , [, ]) | Returns the highest expression (ASCII value, numeric value, or latest date) from a list of character, numeric or date expressions. |

| | |
|---|---|
| MDY(expD) | Returns the specified date expression in Month Day, Year format. |
| MIN( , [, ]) | Returns the lowest expression (ASCII value, numeric value, or earliest date) from a list of character, numeric or date expressions. |
| MONTH(expD) | Returns the numeric month for a given date. |
| NextActivity( , , ) | Returns the due date of the first incomplete activity that meets the specified parameters for the current contact. |
| SECONDS( ) | Returns the number of seconds elapsed since midnight in the format seconds.thousandths. |
| TIME( ) | Returns the current system time. |
| TimeFmt(<exp>) | Returns the time formatted to your display preferences. |
| YEAR(expD) | Returns the year from the specified date expression. |

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
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_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1}
Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

## Expression Builder: Logical Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

Logical functions return true or false. If you wanted to filter on contacts with a date in the RCL field, you would create an expression to only include records when the logical function returns true for a date in that field.

| Logical Function | Purpose |
|---|---|
| YES | Logical true |
| NO | Logical false |
| NOT | Logical negative |
| AND | Logical AND |
| OR | Logical inclusive OR |
| **( )** | Inputs parentheses in your expression ( ) with the cursor located in their center. |
| **<** | Less than |
| **>** | Greater than |
| **=** | Equal to (character strings may be different lengths) |
| **#** (or **<>**) | Not equal to |
| **<=** | Less than or equal to |
| **>=** | Greater than or equal to |
| **==** | Exactly Equal to (character strings must be same length) |
| **.T.** | True (equivalent of Yes) |
| **.F.** | False (equivalent of No) |
| BETWEEN( , , ) | Determines whether or not the value of an expression lies between the values of two other expressions of the same data type. |
| DELETED( ) | Returns true (.T.) if the current record is marked for deletion. TeleMagic already restricts the display of deleted records, so this will return false |

| | |
|---|---|
| | in all cases when used in TeleMagic. |
| EMPTY(<exp>) | Determines whether or not an expression is empty. |
| HASACTIVITY( , , , ) | Returns true (.T.) if a specified activity type is found for the current contact record. |
| IIF( , , ) | Returns one of two values depending on the value of a logical expression. |
| INLIST( , [, ]) | Determines whether or not an expression matches one in a series of expressions of the same data type. |
| SEEK( [, ]) | Searches the current indexed table and returns true (.T.) if the search is successful. |

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## Detailed Listing of Command Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

The following is a detailed list, in alphabetical order, of the functions supported by TeleMagic. Each listing includes a brief description of the command function, the function's syntax, and an example.

IIF( ) TimeFmt( )
INLIST( ) TMPROPER( )
INT( ) TXTMerge(,,,)
LASTACTIVITY( ) UPPER( )

LEFT( ) VAL( )
LEN( ) VERIFYZIPINFO( )
LOWER( ) Wploc( )
LTRIM( ) YEAR( )
MAX( )

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# ALLTRIM( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the specified character string with leading and trailing blanks removed. |
| *Syntax:* | **ALLTRIM(<expC>)** |
| *Parameters:* | **<expC>** can be a character string, a character type field, or a command function that returns a character string. |
| *Example:* | This example removes all leading and trailing blanks from a contact field in the Documentation database. |

ALLTRIM(contact2.contact)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# AT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Searches a character string for the first occurrence of a specified character or character string and returns the numeric position where it was found. This function examines the expression to be searched from the left to the right, and the position occurrence that is returned is counted from the left to the right. This function is the opposite of the RAT( ) function.

*Syntax:* **AT(<expC1>,<expC2>,[ expN ] )**

*Parameters:* **<expC1>** is the expression to search for.

**<expC2>** is the expression to be searched.

**[ expN ]** is the **<expN>th** occurrence of **<expC1>** in **<expC2>**.

*Example:* The following example will return a numeric value of 2, which represents the position of the 1st “e” from the left in the string.

AT(‘e’, 'TeleMagic Enterprise’, ‘1’)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# BETWEEN( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Determines whether or not the value of an expression lies between the values of two other expressions of the same data type.

Returns .T. if the value of **<exp1>** is greater than or equal to the value of **<exp2>** *and* less than or equal to the value of **<exp3>**; otherwise .F. is returned.

*Syntax:* **BETWEEN(<exp1>, <exp2>, <exp3>)**

*Parameters:* **<exp1>** a literal, variable or field to be evaluated.

**<exp2>** the literal, variable or field to be used for the lower range value of the comparison.

**<exp3>** the literal, variable or field to be used for the upper range value of the comparison.

*Example:* This example will determine if the first two characters of the ZIP code field in the Documentation database is between 20 and 29. See SUBSTR for more information on that command function.

BETWEEN(SUBSTR(contact1.zip, 1, 2), ‘20’, ‘29’)

BETWEEN(‘23’, ‘20’, ‘29’)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# CDOW( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns in character form the day of the week from a given date expression.

*Syntax:* **CDOW(<expD>)**

*Parameters:* **<expD>** can be a literal date, a date field, or a command function that returns a date.

*Example:* If the date found in the Birthdate field of the Documentation database were 01/05/97, the value returned for both examples would be Sunday.

CDOW(contact2.birthdate)

CDOW({01/05/97})

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# CHILDCOUNT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the number of related child records. This is not a valid function from Level 3.

*Syntax:* **ChildCount(<exp>)**

*Parameters:* **<exp>** is an optional expression used to limit the child records that are counted. If you use multiple fields in this expression, they must all be from the level being counted. (i.e., If you are using this function on Level 1 to count Level 2 records, you may only include Level 2 fields.)

The expression must be in quotes.

During rebuild all Level 1 calculated fields are evaluated, followed by Level 2, then Level 3. If you select a calculated field in your parameter, you may need to perform the database calculations twice to get an accurate child count. For example, if your child count is on Level 1, TeleMagic will count all of the records that meet the conditions of the expression at that time. When the calculated field is evaluated on Level 2, it may change the records that qualify for the Level 1 child count, rendering the count inaccurate. If you perform the calculations again, the count will be accurate.

*Example:* This example returns the number of related child records.

ChildCount( )

**Warning!**
This function is not supported for calculations performed as part of an import.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## CHILDSUM( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the sum of a child level numeric field. This is not a valid function from level 3. |
| *Syntax:* | **ChildSum(<expN>,<exp>)** |
| *Parameters:* | **<expN>** is a numeric field found on a child level.<br>The field name must be in quotes.<br>**<exp>** is an expression that allows you to limit the child records included. All fields used in this expression must be from the same level as the numeric field.<br>The expression must be in quotes.<br>During rebuild all Level 1 calculated fields are evaluated, followed by Level 2, then Level 3. If you select calculated fields in either of your parameters, you may need to perform the database calculations twice to get an accurate child sum. For example, if your child sum is on Level 1, TeleMagic will read the contents of the referenced fields at that time. When calculated fields are evaluated on the lower level, the data in these fields may change. In this case, the child sum will need to be performed again to reflect the updated information.<br>Both parameters are optional. If no parameters are used, ChildSum will return a count of all child records for the current record, like the CHILDCOUNT( ) function. |
| *Example:* | This example returns the sum of the budget field of the Documentation Database for all contacts assigned to the user JRC (using the Account Rep field).<br>ChildSum(“contact2.budgetDQ,DQSQJRCSQ$contact2.acctrep”)<br>**Note**<br>Double quotes are required for this expression. |

**Warning!**
This function is not supported for calculations performed as part of an import.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}

Examples of Common Expressions

## ChildMemo

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Sums the contents of lower-level memo fields on the parents memo field. This function can only be used as part of a field calculation and may not be used in filters or any other area where functions may be employed. It cannot be used as part of an import.

*Syntax:* **ChildMemo(<expM>, <expF>, <expS>)**

*Parameters:* **<expM>** is the name of the memo field on the lower level that is to be summed.

**<expF>** is the filter expression used to limit which records' memo fields will be included in the upper level memo.

**<expS>** is the separator to be used between each entry.

*Example* The following example will combine the notepad field from level 2 and insert <-----> and a carriage return between each memo:

ChildMemo("contact2.notepad", "contact2.type='Complaint'",>> "<"+repl('-',5)+'>"+chr(13))

The resulting memo field would appear like this:

MEMO1
<----->
MEMO2
<----->

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# CHR( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the character associated with the specific numeric ASCII code. The character returned may be different from standard ASCII code due to the font in use.

*Syntax:* **CHR(<expN>)**

*Parameters:* **<expN>** is a numeric expression that evaluates from 0 to 255.

*Example:* This command function is useful if you want to use extended ASCII characters in your expression. For example, entering:

CHR(163)

will return the **£** symbol using Times New Roman TrueType font. If you are using Terminal font, the correct expression for the **£** symbol is CHR(156).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# CMONTH( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns in character form the name of the month for a given date. |
| *Syntax:* | **CMONTH(<expD>)** |
| *Parameters:* | **<expD>** can be a literal date, a date field, or a command function that returns a date. |
| *Example:* | If the contents of the Birthdate field were 01/05/97, both examples below would return “January”. |

CMONTH(contact2.birthdate)

CMONTH({01/05/97})

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# CTOD( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Converts a character string to a date expression. |
| *Syntax:* | **CTOD(<expC>)** |
| *Parameters:* | **<expC>** must contain a valid date from 1/1/100 to 12/31/9999. The default format is mm/dd/yy. |
| *Example:* | This example converts the first 10 characters of TeleMagic's TMStart field to date format (the TMStart field uses the Century setting on, so all 4 digits of the year will be entered into the field). See SUBSTR for more information on that command function. |

CTOD(SUBSTR(contact1.tmstart, 1, 10))

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# DATE( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the current system date. |
| *Syntax:* | **DATE( )** |
| *Example:* | Use this command function to include the current date in your expression. This is useful for including the date a report is printed, or for inclusion in calculations of the number of days from a fixed date to today. The default format is mm/dd/yy, but will reflect your System preferences for date format. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## DAY( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the numeric value of the day of the month for a given date. The values returned will be between 1 and 31.

*Syntax:* **DAY(<expD>)**

*Parameters:* **<expD>** can be a literal date, a date field, or a command function that returns a date.

*Example:* If the contents of the Birthdate field in the Documentation database were 01/05/97, both examples would return 5, which represents the fifth day of the month.

DAY (contact2.birthdate)

DAY({01/05/97})

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# DOW( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the numeric value which represents the day of the week for a given date (i.e., 1= Sunday; to 7= Saturday).

*Syntax:* **DOW(<expD>)**

*Parameters:* **<expD>** can be a literal date, a date variable or a command function that returns a date.

*Example:* If the contents in the Birthdate field of the Documentation database were 01/05/97, both examples would have a return value of 1 which represents Sunday.

DOW(contact1.birthdate)

DOW({01/05/97})

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# DTOC( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns a character type date for a specified date expression. |
| *Syntax:* | **DTOC(<expD>)** |
| *Parameters:* | **<expD>** can be a literal date, a date variable, or a command function that returns a date. |
| *Example:* | This example converts today's date to a character string which allows the date to be included in a string of text. See DATE( ) for more information on that command function. |

“Today's date is” DTOC(DATE()) “.”

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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# DTOS( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns a character string date in YYYYMMDD format for a specified date expression. |
| *Syntax:* | **DTOS(<expD>)** |
| *Parameters:* | **<expD>** can be a literal date, a date field, or a command function that returns a date. |
| *Example:* | If the Birthdate field in the Documentation database contained the date 01/05/97, both examples below would return a character string of: 19970105. |

DTOS(contact1.birthdate)

DTOS({01/05/97})

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
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## DTSTAMP( )

Returns the string used to stamp memo fields This consists of the date, time, and User ID, seperated by dashes. This function takes no parameters.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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## FV( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the future value of an investment. |
| *Syntax:* | **FV(<expN1>,<expN2>,<expN3>)** |
| *Parameters:* | **<expN1>** is the constant periodic payment rate, which can be negative or positive. |
| | **<expN2>** is the periodic interest rate. If the interest rate is annual, divide it by 12. |
| | **<expN3>** is the number of periods over which payments are made. FV() assumes that payments are made at the end of each period. |
| *Example:* | This function computes the future value of a series of constant periodic payments earning fixed compound interest. If the payment amount is 500, the annual percentage rate is 7.5%, and the number of payment periods is 60, this expression returns the future value of the investment: |
| | FV(500,.075/12,60) |
| | which is equal to: $36263.55. |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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## HASEVENT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* 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.

*Syntax:* **HASEVENT(<expT>,<expY>,<expI>)**

*Parameters:* **<expT>** is the field containing the significant date. This can be a date or character field. A full date is not required, the field can contain only the month and day of the event instead of the complete date.

**<expY>** is the number of days from the current date during which the significant date can occur. Make this a negative number to search for records where the event has already occured.

**<expI>** indicates whether to ignore the year portion of the date. This is Y by default. Use “N” if you do not want to disregard the year.

*Examples:* HASEVENT(contact1.birthdate,7,”Y”)

This example would find all records with birthdays falling in the next 7 days, regardless of year.

HASEVENT(contact1.anniversary,-7)

This example would find all records with anniversaries that have occured in the last 7 days.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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## Activity Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

HasActivity( )
FirstActivity( )
LastActivity( )
NextActivity( )

## HasActivity( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns true (.T.) if an activity meeting the specified set of criteria is found for the current contact record.

*Syntax:*

**HasActivity(<expN>,<expC1>,<expC2>,<expC3>,<expD1>,<expD2>,<expS>,<expF>)**

*Parameters:* **<expN>** is 1, 2, or 3, indicating the level containing the contact record. If an invalid level is entered, 1 will be used by default.

**<expC1>** is the type of activity to be located. (Leave this entry blank to include any type of activity for the current contact record.)

**<expC2>** is the three character User ID. (You may leave the entry blank to include all users.)

**<expC3>** is the completion status. Use **I** to search for incomplete activities, C to search for complete activities, and B to search for Both.

**<expD1>** is the start date for the period to be searched.

**<expD2>** is the ending date of for the period to be searched.

**<expS>** is the string to be searched for. The search is not context sensitive.

**<expF>** is the field where <expS> is located.

C if the string is in the activity comments

D if the string is in the activity description

*Example:* This example indicates whether the current contact on Level 2 has an incomplete activity with the type “Call” for any user which occurred in the last 30 days, and contains “Search String” in the activity comments.

HasActivity(2,'Call',' ','I',date()-30,date(),”Search String”, “C”)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## FirstActivity( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the completion date of the first completed activity that meets the specified parameters for the current contact.

*Syntax:* **FirstActivity(<expN>,<expC1>,<expC2>,<expC3>)**

*Parameters:* **<expN>** is 1, 2, or 3, indicating the level containing the contact record. If an invalid level is entered, 1 will be used by default.

**<expC1>** is the type of activity. (You may leave the entry blank to include all activity types.)

**<expC2>** is the three character User ID. (You may leave the entry blank to include all users.)

**<expC3>** allows you to specify which date should be returned. Enter D to return the due date or C to return the completion date. (If this parameter is not used, TeleMagic will return the due date.)

*Example:* This example will return the completion date of the first completed activity of any type linked to a record on Level 3 for the user TST.

FirstActivity(3,' ','TST','C')

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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## NextActivity( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns information specified by the WhatToReturn parameter of the next incomplete activity that meets the remaining parameters. |
| *Syntax:* | **NextActivity(<expN>,<expC1>,<expC2>,<WhatToReturn>)** |
| *Parameters:* | **<expN>** is 1, 2, or 3, indicating the level containing the contact record. If an invalid level is entered, 1 will be used by default. |

**<expC1>** is the type of activity. (You may leave the entry blank to include all activity types.)

**<expC2>** is the three character User ID. (You may leave the entry out to include all users.)

**<WhatToReturn>** can be any combination of the following:

D The date of the activity.

T The time of the activity.

S The activity description.

C The activity comments.

X Converts carriage returns and line feeds to one space.

These codes can be used in any order, but will always be returned in the order *Date, Time, Description,* and *Comments.* When used in a filter, the specified return must match the value to be compared. For example, if you are searching for records whose next activities fall on a particular date, the WhatToReturn parameter must be "D".

*Example:* This example will return the due date and description of the next activity of the type "Call" linked to a Level 2 contact for any user.

NextActivity(2,"Call",,"DS")

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

# LastActivity( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the date of the latest complete activity that meets the specified parameters for the current contact. |
| *Syntax:* | **LastActivity(<expN>,<expC1>,<expC2>,<expC3>)** |
| *Parameters:* | **<expN>** is 1, 2, or 3, indicating the level containing the contact record. If an invalid level is entered, 1 will be used by default.<br><br>**<expC1>** is the type of activity. (You may leave the entry blank to include all types.)<br><br>**<expC2>** is the three character User ID. (You may leave the entry blank to include all users.)<br><br>**<expC3>** allows you to specify which date should be returned. Enter D to return the due date or C to return the completion date. (If this parameter is not used, TeleMagic will return the due date.) |
| *Example:* | This example will return the due date of the last activity linked to a contact on Level 1 with the type “Call” for the user TST.<br><br>LastActivity(1,'Call','TST','D') |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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# IIF( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns one of two values depending on the value of a logical expression. |
| *Syntax:* | **IIF(<expL>,<exp1>,<exp2>)** |
| *Parameters:* | **<expL>** is the logical expression to be evaluated. |
| | **<exp1>** is the expression to be returned if **<expL>** is true. |
| | **<exp2>** is the expression to be returned if **<expL>** is false. |
| *Example:* | If the current user's ID is TST, a logical value of .T. is returned; otherwise .F. is returned. |

IIF(m.cUserID = 'TST', .T., .F.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# LEFT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a specified number of characters from a character string, starting with the leftmost character.

*Syntax:* **LEFT(<expC>,<expN>)**

*Parameters:* **<expC>** is the character string from which characters are returned.

**<expN>** is the number of characters returned.

*Example:* This example extracts 5 characters from the left, returning: "Terry".

LEFT("Terry S. Thompson", 5)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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# LEN( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the number of characters in a character string.

*Syntax:* **LEN(<expC>)**

*Parameters:* **<expC>** can be a character string, a character field, or a command function that returns a character string.

*Example:* If the contents of the Company field were “Academe”, both examples below would return a numeric value of 7. See the section on RTRIM( ) for further information on that function.

LEN(RTRIM(contact1.company))

LEN(“Academe”)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# LOWER( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns a specified character string in lower case letters. |
| *Syntax:* | **LOWER(<expC>)** |
| *Parameters:* | **<expC>** can be a character string, a character field, or a command function that returns a character string. |
| *Example:* | If the contents of the state field were "HI", both examples below would return a character string of "hi". |
| | LOWER(contact1.state) |
| | LOWER("HI") |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
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Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

# LTRIM( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the specified character string with leading blanks removed. |
| *Syntax:* | **LTRIM(<expC>)** |
| *Parameters:* | **<expC>** can be a character string, character field, or a command function that returns a character string. |
| *Example:* | When numeric values are converted to a character string, a series of blanks are added the left side of the string. This is because numeric fields are usually right justified while character fields are usually left justified. The LTRIM function allows you to easily remove the extra blanks. |

“The current revenue is: “ LTRIM(STR(contact1.parev))

STR(), used in the above example, converts a numeric expression to a character expression. See STR() for more Information.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# MONTH( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the numeric value of a month for a given date. (The numeric value of January is 1, February is 2, and so on.) |
| *Syntax:* | **MONTH(<expD>)** |
| *Parameters:* | **<expD>** can be a literal date, a date field, or a command function that returns a date. |
| *Example:* | If the contents of the Birthdate field in the Documentation database were 01/05/97, both of these examples below would return a value of 1, which represents the month of January. |

MONTH(contact2.birthdate)

MONTH({01/05/97})

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## NPDMERGE

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Combines the contents of two memo fields into a single unit, sorted by date.

*Syntax:* **NPDMERGE(<memo field 1>, <memo Field 2>)**

*Parameters:* **<memo field 1>** is the field name of the first memo field.

**<memo Field 2>** is the field name of the second memo field.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# RAT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Searches a character string for the last occurrence of a specified character or character string and returns the numeric position where it was found. This function examines the expression to be searched from the right to the left, but the position occurrence that is returned is counted from the left to the right. This function is the opposite of the AT function.

*Syntax:* **RAT(<expC1>,<expC2>,[ expN ] )**

*Parameters:* **<expC1>** is the expression to search for.

**<expC2>** is the expression to be searched.

**[ expN ]** is the **<expN>th** occurrence of **<expC1>** in **<expC2>**.

*Example:* The following example will return a numeric value of 20, which represents the position of the 1st “e” from the right in the string.

RAT(‘e’, 'TeleMagic Enterprise’, ‘1’)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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# RECNO( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the hidden record number. |
| *Syntax:* | **RECNO( )** |
| *Example:* | Use this command function to include the record number of the current record in your expression. This is useful for including the record number in reports. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## REPLICATE( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Repeats a Character Expression a specified number of times.

*Syntax:* **REPLICATE(<expC>,<expN>)**

*Parameters:* **<expC>** is the character Expression from which to be replicated.

**<expN>** is the number of times to repeat.

*Example:* To repeat a Tab 8 times, use one of the following expressions. Both will enter 8 Tab characters, however, in a function key, the '{tab}' will take 5 characters to play out, where the chr(9) will only take one character. See the CHR( ) section for more information.

REPLICATE('{tab}',8)

REPLICATE(chr(9),8)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## RIGHT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the specified number of rightmost characters from a character string.

*Syntax:* **RIGHT(<expC>,<expN>)**

*Parameters:* **<expC>** is the character string from which characters are returned.

**<expN>** is the number of characters returned.

*Example:* This example will return the string “Magic”.

RIGHT(“TeleMagic”, 5)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# RTRIM( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the specified character string with all trailing blanks removed. This performs the same function as TRIM( ).

*Syntax:* **RTRIM(<expC>)**

*Parameters:* **<expC>** can be a character string, a character field, or a command function that returns a character string.

*Example:* This command function is useful when concatenating strings. To create a string that combines the Documentation database's City and State fields, with one space and a comma (,) separating them, use:

RTRIM(contact1.city) ", " contact1.state

If the city is Mesa and the state is AZ, this returns: Mesa, AZ. Without the RTRIM( ) function, the full length of the city field would be displayed after the city name. Therefore, if the length of the city field is 30 characters, there would be 26 blank spaces between the end of the city name and the comma (,).

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# STR( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the character string equivalent to a specified numeric expression.

*Syntax:* **STR(<expN1>[,<expN2>,<expN3>])**

*Parameters:* **<expN1>** can be a numeric value, a numeric field, or a command function that returns a numeric value.

**<expN2>** is the total length of the numeric expression to be displayed, including the decimal point and the each digit to the right of the decimal point. If you specify more that the actual length of the numeric value of **<expN1>**, the display will be padded to the left with spaces to fill the specified length.

**<expN3>** is the number of decimal places to be displayed. If you specify less than the number of decimal places, the display will be truncated.

*Example:* This command function is useful when it is necessary to include a numeric value (field or variable) in a character string. See the LTRIM( ) section for more information.

“The current revenue is:   “ LTRIM(STR(contact1.parev))

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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## STRTRAN( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Searches a character string for occurrences of a second character string, and then replaces each occurrence with a third character string.

*Syntax:* **STRTRAN(<expC1>,<expC2>[,<expC3>][,<expN1>][,<expN2])**

*Parameters:* **<expC1>** is the character string to search. This may be a memo field.

**<expC2>** is the character string in **<expC1>** to replace.

**<expC3>** is the character string that replaces **<expC2>**. If this is blank **<expC2>** is replaced with a null string. This is an optional parameter.

<**expN1**> is the number of the occurrence in the string where you want to begin the replace. This is an optional parameter, and if left blank, all occurrences will be replaced.

<**expN2**> is the number of occurrences to replace. This is an optional parameter, and if left blank, all occurrences will be replaced.

*Example:* This example illustrates how to replace all occurrences of the word phone with the word telephone in the Documentation database Level 2 Notepad field.

STRTRAN(contact2.notepad,'phone','telephone')

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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# SUBSTR( ) or SUBS( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a specified number of characters from the given character string.

*Syntax:* **SUBSTR(<expC>,<expN1>[,<expN2>])**

*Parameters:* **<expC>** is the string that contains the characters you want to search for.

**<expN1>** is the position in the character string where extraction will begin.

**<expN2>** is the number of characters to extract. If this is omitted, characters are extracted to the end of the character string.

*Example:* If the Contact field in the Documentation database contains “Mr. Tom Jones”, this example allows “Tom” to be extracted.

SUBSTR(contact2.contact,4,3)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## Stuff( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns a character string created by replacing a specified number of characters in a character expression with another character expression. |
| *Syntax:* | **STUFF(<expC1>, <expN1>, <expN2>, <expC2>)** |
| *Parameters:* | **<expC1>** is the string in which the replacement occurs. |
| | **<expN1>** specifies the position in **<expC1>** where the replacement begins. |
| | **<expN2>** is the number of characters to be replaced in **<expC1>**. If **<expN2>** is 0, the replacement string **<expC2>** is inserted into **<expC1>**. |
| | **<expC2>** is the replacement character string. If **<expC2>** is the null string (‘’), the number of characters specified by **<expN2>** are removed from **<expC1>**. |
| *Example:* | If the Contact field in the Documentation Database contains “Mr. John Mason”, this example would place a “G.” as his middle initial, “Mr. John G. Mason”. See the AT( ) subject for more information: |
| | STUFF(contact2.contact,(AT(‘ ‘,contact2.contact,2)+1),0,’G. ‘) |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
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# TMPROPER( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Formats a character string with the appropriate capitalization.

*Syntax:* **TMPROPER(<expC>)**

*Parameters:* **<expC>** is the character string to be formatted with appropriate capitalization.

*Example:* If the Contact field in the Documentation database contains "mr. tom macdonald", this example would return: Mr. Tom MacDonald

TMPROPER(contact2.contact)

TMPROPER('mr. tom macdonald')

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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# TIME( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the current system time in 24 hour format. |
| *Syntax* | **TIME( )** |
| *Example:* | Use this command function to include the current system time in your expression. This is useful for including the time a report is printed, or appended to a field. Note that the time returned will be in the format of HH:MM:SS (hours, minutes and seconds). |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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# TimeFmt( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a character time value from the supplied expression formatted using `Time Format` settings in Display preferences.

*Syntax* **TimeFmt(<exp>)**

*Parameters:* The time that should be converted to the Display preference settings. Can be either character expression, field, or system time.

*Example:* By default, times generated from an expression will be formatted in 24-hour clock, regardless of your Display preferences. This example will read your Display preferences and return the system time in the specified format.

TimeFmt(TIME())

If your Display preferences are set to 24-hour clock, there is still an advantage in using TimeFmt( ) instead of using TIME( ) alone. In the above example, if the system time were 2:30 in the afternoon, TIME( ) would return a value of 14:30:00, where TimeFmt() would return 14:30 without the seconds, if your Display preference were set to 24 hour format, or 2:30p if your Display preference were set to 12 hour. If you do not want to use seconds in your return, use TimeFmt( ). See TIME( ) for more on generating the system time.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
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## TXTMerge

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Merges and sorts the contents of two text expressions, and eliminates any duplicates. |
| *Syntax:* | **TXTMerge(<exp1>,<exp2>,<expD>,<expS>** |
| *Parameters:* | **<exp1>** is the field name of the field containing the first text expression. |
| | **<exp2>** is the field name of the field containing the second text expression. This parameter can be empty if you only want to sort one expression. |
| | **<expD>** specifies the delimiter. This is a comma by default, but can be any character or combination of characters. |
| | **<expS>** specifies whether to sort the result. This can be either .T. or .F., and defaults to .F.. |
| *Example:* | If contact1.field1 contains “a,c,b”, and contact1.field2 contains “b,d”, then: |
| | TXTMerge(contact1.field1, contact1.field2,”,”,.T.) would return: |
| | “a,b,c,d” |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# UPPER( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the specific character string in uppercase. |
| *Syntax:* | **UPPER(<expC>)** |
| *Parameters:* | **<expC>** can be a character string, a character field, or a command function that returns a character string. |
| *Example:* | If the Contact field in the Documentation database contained “Tom Jones”, the following example would return: “TOM JONES”. |

UPPER(contact2.contact)

UPPER(‘Tom Jones’)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# VAL( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a numeric expression from a specified character string composed of numbers.

*Syntax:* **VAL(<expC>)**

*Parameters:* **<expC>** can be a character string composed of numbers, a character field that contains numbers, or a command function that returns a character string of numbers.

*Example:* For example, in the Documentation database, if you use only numbers in your Product Category field, (which is defined as a character field) and you want to convert these characters to numeric values, enter:

VAL(contact3.concat)

If there are any characters in this field (or the field that you use), the VAL( ) function will return a value of 0. The only accepted characters are numbers and one period for a decimal point. Commas are not allowed.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# Wploc( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the storage location of the description for word processing documents (user, global, or database list). |
| *Syntax:* | **WPLOC( )** |
| *Example:* | Use this function in the Screen Designer to include information on the storage location of word processing documents in a document rollup. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# YEAR( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the numeric value of the year from the specified date expression. The number returned will always have the century included, such as 1997. |
| *Syntax:* | **YEAR(<expD>)** |
| *Parameters:* | **<expD>** can be a literal date, a date field, or a command function that returns a date. |
| *Example:* | To return the year of the current date, enter:<br>YEAR(DATE( )) |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# Some Examples of Common Expressions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

Common Advanced Filter Expressions:
Common Group Replace Expressions:
Common Function Key Expressions:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

## Common Advanced Filter Expressions:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

To test to see if a particular field is not empty (remove the exclamation mark to see records where that field *is* empty):

```
!EMPTY(CONTACT1.NAME)
```

To see if that same field is empty:

```
EMPTY(CONTACT1.NAME)
```

To test a date field to see if it is equal to today’s date:

```
CONTACT1.DATEFIELD=DATE()
```

To sort on a range of dates for 30 days before today:

```
(CONTACT1.DATEFIELD>=DATE()-30) AND (CONTACT1.DATEFIELD<=DATE()-1)
```

To find all “Customer” records (in a status field) in either California, Oregon, or Washington:

```
(CONTACT2.STATUS=”Customer”) AND ((CONTACT1.STATE=”CA”) OR
(CONTACT1.STATE=”OR”) OR (CONTACT1.STATE=”WA”))
```

Use this expression to filter on a specific date range, where the date is in a character field such as the tmstart field. To filter on the tmlastrev field, change the field name to tmlastrev and the 1,8 to 3,8 in both places. It should be noted that if you have a first time install of V4, the TMSTART and TMLASTREV fields will store their dates with the century set on, so that it will require the SUBSTR( ) values to have a 1,10 and a 3,10 respectively for this expression to work properly.

```
CTOD(SUBSTR(contact1.tmstart,1,8))>=CTOD(‘03/01/96’) AND
CTOD(SUBSTR(contact1.tmstart,1,8))<=CTOD(‘04/01/96’)
```

Use this expression to filter on a date range of the two weeks prior to today’s date, where the date is in a character field. This expression also has the addition of the user ID on the end, to pull up just the records that were created in the last two weeks by the user TST. Remember that to filter on the tmlastrev field, change the field name to tmlastrev and the 1,8 to 3,8 in both places. If should be noted that if you have a first time install of V4, the TMSTART and TMLASTREV fields will store their dates with the century set on, so that it will require the SUBSTR( ) values to have a 1,10 and a 3,10 respectively for this expression to work properly.

```
CTOD(SUBSTR(contact1.tmstart,1,8))>=DATE()-14 AND
CTOD(SUBSTR(contact1.tmstart,1,8))<=DATE() AND (‘TST’$UPPER(contact1.tmstart))
```

Use this expression in a filter to find people celebrating a birthday today. This expression assumes that contact1.birthdate is a date field:

```
SUBSTR(DTOC(contact1.birthdate),1,5)=SUBSTR(DTOC(DATE()),1,5)
```

Use this expression in a filter to find people celebrating a birthday in the next 30 days:

```
SUBSTR(DTOC(contact1.birthdate),1,5)>SUBSTR(DTOC(DATE()),1,5) AND
```

SUBSTR(DTOC(contact1.birthdate),1,5)<=SUBSTR(DTOC(DATE()+30),1,5)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_FiltersExpression_Builder)<<1} Creating Filters
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

## Common Group Replace Expressions:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

To stamp the notepad with the date, time, User ID, and any text you want to include in between the quotation marks:

DTOC(DATE())+" "+TIME()+" "+CUSERID+" - This is stamped"+CHR(13)+contact1.notepad

To retrieve the last name in the contact1.name field that has a length of 30 characters and that contains *first-name last-name*:

RIGHT(contact1.name,(30-RAT(" ",TRIM(contact1.name))))

If your field is longer or shorter than 30 characters, adjust the 30 to the length of your field.

To index on the month and day in a date field, ignoring the year:

STR(MONTH(contact1.datefield))+STR(DAY(contact1.datefield))

To return the second word in the contact1.name field up to the second occurrence of a space:

SUBS(contact1.name,AT(" ",contact1.name)+1,(AT(" ",contact1.name,2)-(AT(" ",contact1.name)+1))

To return the contents of the contact1.name field up to the first occurrence of a space (i.e., first name):

SUBS(contact1.name,1,AT(" ",contact1.name)-1)

**or**

LEFT(contact1.name,AT(" ",contact1.name))

To return the first name in the contact1.name field, and a middle initial if it exists:

SUBS(contact1.name,1,(RAT(" ",TRIM(contact1.name))))

To return everything from the character to the right of the first space to the end of the field:

SUBS(contact1.charfield,AT(" ",contact1.charfield)+1,30-AT(" ",contact1.charfield))

Again, it should be noted that the character field in the above expression is 30 characters in length. If your field is longer or shorter, adjust the 30 accordingly.

To convert telephone numbers in a telephone field from the format of ‘6195551212’ to the format '619-555-1212':

SUBS(phonefield,1,3)+"-"+SUBS(phonefield,4,3)+"-"+SUBS(phonefield,7,4)

To switch the positions of first and last names if the last name is first—even if there is a middle initial at the end:

TRIM(SUBS(contact1.name,AT(' ',TRIM(contact1.name))+1))+' '+SUBS(contact1.name,1,(AT(' ',contact1.name)))

To move a date from a character field to a date field:

CTOD(SUBSTR(contact1.charfield,1,2)+'-'+SUBSTR(contact1.charfield,4,2)+'-'+SUBSTR(contact1.charfield,7,2))

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Group_Replace)<<1} Group Replace

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

## Common Function Key Expressions:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

To set a recall for the current contact:

‘{alt+c}’+‘r’+‘{enter}’

To set a recall for the current contact one week from today, and turn the alarm off:

‘{alt+c}’+‘r’+replicate(‘{tab}’,5)+dtoc(date()+7)+replicate(‘{tab}’,3)+’{spacebar}’+’{alt+o}’

To stamp the notepad with the date, time and user ID (same as using Alt-N):

‘{ctrl+home}’+dtoc(date())+’ ‘+substr(time(),1 ,5 )+’ - ‘+cUserID+’ - ‘

To add a record at the current level:

‘{alt+a}’+‘{enter}’

To add a child (level 2) record to the current level 1 record:

‘{alt+a}’+replicate(‘{dnarrow}’,3)+replicate(‘{enter}’,2)

To add a child (level 3) record to the current level 2 record:

‘{alt+a}’+‘{uparrow}’+replicate(‘{enter}’,2)

To go to a different database, where ‘1’ is the first character in the database name:

‘{alt+f}’+‘S’+‘1’+‘{alt+o}’

To select Goto and choose an index, where ‘1’ is the first character in the index name:

‘{alt+g}’+replicate(‘{tab}’,2)+‘1’

Function Key expressions can only output 127 characters (what is called the evaluated expression). So, your Function Key expression can be much longer than 127 characters, but when the Function Key is actually run, the output can only be 127 characters or less. Some of the ways to save on keystrokes (that which is output) can be to replace some of the ‘{expressions}’ listed above with their CHR( ) values. An ‘{ENTER}’ entered this way will take 7 keystrokes, where a CHR(13) would only take one and do the same thing. ‘{TAB}’ takes 5 characters, CHR(9) only one. ‘{SPACEBAR}’ takes 10 characters, CHR(32) only one. This is not true of all the special keys, but the ones listed here should provide some help. Some of the other things that can help save keystrokes are to RTRIM( ) any fields of information that you use in your Function Key. The characters contained in the field that are used in the Function Key count to that 127 character total. So, as an example of how you can save some keystrokes, here is the Function Key to add a child (level 2) record to the current level 1 record:

‘{alt+a}’+replicate(‘{dnarrow}’,3)+chr(32)+chr(13)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½PREFS_Function_Key_Setup)<<1} Function Key Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

## Example of +

This example concatenates the contents of the contact field with the company field.

contact2.contact contact1.company

Note that the full contents of both fields would be combined together in this expression, including the blank space after the actual data up to the end of the field.

## Example of -

This example concatenates the contents of the contact field with the company field (trailing blanks are moved from the end of the first string to the end of the second string).

contact2.contact - contact2.contitle

## Example of $

This example will return .T. if the contact field contained a “C”, otherwise .F. will be returned.

“C” $ contact2.contact

“C” $ “Peter Chisholm”

# ASC( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the ASCII code for the leftmost character in a character string.

*Syntax:* **ASC**(<expC>)

*Parameters:* **<expC>** the character string to be evaluated.

*Example:* This example will return the ASCII value of the leftmost character of the contents company field of the Documentation database.

ASC(contact1.company)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# ATC( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the first position from the left (as an integer) of the specified occurrence of a character string within another character string or memo field. |
| *Syntax:* | **ATC(<expC1>, <expC2>, <expN>)** |
| *Parameters:* | **<expC1>** is the character string to be sought. |
| | **<expC2>** is the character string to be evaluated. |
| | **<expN>** is the occurrence of <expC1>. |
| *Example:* | This example will return the numeric value of the second occurrence of the letter ‘e’, which in the example would be 4. |
| | ATC(“e”, “TeleMagic”, 2) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1}
Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

# CHRTRAN( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Translates a character string using two other strings as translation tables.

*Syntax:* **CHRTRAN(<expC1>, <expC2>, <expC3>)**

*Parameters:* **<expC1>** is the initial character string that will have the replacement done to it. This can be a Memo field.

**<expC2>** is the character to be replaced

**<expC3>** is the character to use in the replacement

*Example:* This example will replace all occurrences of “*” with an “e”, changing the above character string to “TeleMagic Enterprise”

CHRTRAN('T*l*Magic Ent*rpris*', '*', 'e')

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1}
Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

# MAX( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the highest expression (ASCII, numeric value or the latest data) from a list of character, numeric or date expressions.

*Syntax:* **MAX(<exp1>,<exp2>{,<exp3>, ... })**

*Parameters:* **<exp1>** is the first expression to be evaluated

**<exp2>** is the next value to be compared against.

**<exp3>** and beyond are additional values to be compared against. It should be noted that all the **<exp?>** values used must be of the same type. So that if you use a numeric value as **<exp1>**, then all values compared must be numeric values. If numbers are used, the greatest number is returned, if letters are used, the highest ASC II value is returned, and if dates are used, the latest date is returned. Up to 24 **<exp?>** can be used in this expression.

*Example:* This example using the Last Call field from the Documentation Database will return the most recent date, whether it is 30 days ago from today's date, or if it is the date in the Last Call field.

MAX(contact2.lastcall,(date()-30))

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# NpdSelect( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

In order to use NpdSelect(), entries in the specified memo field must be preceded by a date. Dates must use the date separator character specified in System preferences to be recognized. If the dates are in a different format than the system standard (i.e., 28/10/99 instead of 10/28/99), NpdSelect() will attempt to convert them. In order to isolate the user, you must also include the User ID in the notepad stamp. (TeleMagic will recognize the User ID if it is either immediately following the date stamp, or following a time stamp that immediately follows the date stamp. It also must be preceded by a space, a dash, and another space. **Example:**   10/28/99 - JRC, or 10/28/99 8:00p - JRC.)

*Description:* Returns the specified portion of the specified memo field. This function can only be used in expressions for Custom Reports, WordPad documents, and Group Replace.

*Syntax:* **NpdSelect(<expC1>,<expD1>,<expD2>,<expC2>)**

*Parameters:* **<expC1>** is the memo field name.

**<expD1>** is the start date. Any entries in the memo field stamped with a date after the indicated start date will be selected. If you enter a blank date or if your notepad entries have no date stamps, all entries from the beginning of the memo field will be returned.

**<expD2>** is the end date. Entries in the memo field must be date stamped before the specified end date to be included. If you enter a blank date or your notepad entries have no date stamps, all entries from the start point to the end of the memo field will be included.

**<expC2>** is a User ID. Enter a three character User ID in quotes to only select memo field entries that have been stamped with that specified ID. (This parameter is optional.)

*Example:* This example will return memo field entries for the user TST in a Level 1 field named Memo from January 1, 1997 through to the end of the notepad.

NpdSelect(contact1.memo,{01/01/97},' ','TST')

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## MIN( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the lowest expression (ASCII, numeric value or the latest data) from a list of character, numeric or date expressions.

*Syntax:* **MIN(<exp1>,<exp2>{,<exp3>, ... })**

*Parameters:* **<exp1>** is the first expression to be evaluated

**<exp2>** is the next value to be compared against.

**<exp3>** and beyond are additional values to be compared against. It should be noted that all the **<exp?>** values used must be of the same type. So that if you use a numeric value as **<exp1>**, then all values compared must be numeric values. If numbers are used, the lowest number is returned, if letters are used, the lowest ASC II value is returned, and if dates are used, the oldest date is returned. Up to 24 **<exp?>** can be used in this expression.

*Example:* This example using the Last Call field from the Documentation Database will return the oldest date, whether it is 30 days ago from today's date, or if it is the date in the Last Call field.

MIN(contact2.lastcall,(date()-30))

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# OCCURS( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the number of times a character string occurs within another character string. |
| *Syntax:* | **OCCURS(<expC1>, <expC2>)** |
| *Parameters:* | **<expC1>** is the character string to locate. |
| | **<expC2>** is the character expression to be searched. |
| *Example:* | This example will return the number of times “a” is found in the notepad field of the current contact record. |
| | OCCURS(‘a’,contact2.notepad) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
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# PADC( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the specified expression padded on both sides with a specified character.

*Syntax:* **PADC(<expC1>, <expN>,<expC2>)**

*Parameters:* **<expC1>** is character string to be padded.

**<expN>** is the numeric width of the item to be padded.

**<expC2>** is the character to use for padding. If this is not specified, a space will be used.

*Example:* This example will pad the word “TeleMagic” with the equal sign ( = ) for a total of 30 characters.

PADC('TeleMagic', 30,’=‘)

Which would appear like this:

==========TeleMagic===========

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
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# PADL( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the specified expression padded on the left side with a specified character.

*Syntax:* **PADL(<expC1>, <expN>,<expC2>)**

*Parameters:* **<expC1>** is the character string to be padded.

**<expN>** is the numeric width of the item to be padded.

**<expC2>** is the character to use for padding. If this is not specified, a space will be used.

*Example:* This example will pad with word “Enterprise” with 30 spaces, less the length of the word ‘Enterprise’ (10 characters, so 20 spaces would appear in front of Enterprise), to the left of it.

‘TeleMagic’ PADL(‘Enterprise’, 30)

Which would appear like this:

TeleMagic                    Enterprise

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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# PADR( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the specified expression padded on the right side with a specified character.

*Syntax:* **PADR(<expC1>, <expN>,<expC2>)**

*Parameters:* **<expC1>** the character string to be padded.

**<expN>** the number of spaces to pad.

**<expC2>** is the character to use for padding. If this character is not specified, a space will be used.

*Example:* This example will pad the word “TeleMagic” with 30 spaces, less the length of the word TeleMagic ( 9 characters, so 21 spaces), to the right of it.

PADR(‘TeleMagic’, 30) ‘Enterprise’

Which would appear like this:

TeleMagic                     Enterprise

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## PROPER( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the specified character string with each word having the initial letter capitalized and the remaining characters lowercase.

*Syntax:* **PROPER(expC)**

*Parameter:* **<expC>** the character string to be formatted.

*Examples:* If the contents of the contact field in the documentation database contained “mr. tom macdonald”, this example would return “Mr. Tom Macdonald”.

PROPER(contact2.contact)

PROPER(‘mr. tom macdonald’)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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# SPACE( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a character string composed of a specified number of spaces.

*Syntax:* **SPACE(expN)**

*Parameter:* **<expN>** the number of spaces to be placed in a character string.

*Example:* This example will return the contents of the contact and company fields, separated by a series of 10 spaces. See the RTRIM( ) topic for further information.

RTRIM(contact2.contact) SPACE(10) RTRIM(contact1.company)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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# TYPE( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the data type of the expression (character, numeric, logical, data and memo).

*Syntax:* **TYPE(<exp>)**

*Parameter:* **<exp>** is the fieldname or variable to be evaluated.

*Example:* This example will return “C” to indicate the contact field is of character type.

TYPE(‘contact2.contact’)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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## Example of (Math)

This example will return the value of the budget field plus 50.

contact2.budget 50

## Example of - (Math)

This example will return the value of the budget field minus 50.

```
contact2.budget - 50
```

## Example of *

This example will return the value of the budget field multiplied by 50.

contact2.budget * 50

## Example of /

This example will return the value of the budget field divided by 50.

```
contact2.budget / 50
```

## %

*Description:* Returns the remainder obtained by dividing a numeric expression by another numeric expression.

*Example:* If the budget field contained a value of 36 and the terms field contained a value of 10, both examples would return a numeric value of 6.

contact2.budget % contact2.terms     or     36 % 10

# ABS( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the absolute value of a specified numeric function. |
| Syntax | **ABS(expN)** |
| *Parameter:* | **<expN>** the numeric expression to be evaluated. |
| *Examples:* | If the contents of the budget field were -45, these examples would return 45. |
| | ABS(contact2.budget) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# INT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the integer portion of numeric expression.

*Syntax:* **INT(<expN>)**

*Parameter:* **<expN>** the numeric expression to be evaluated.

*Example:* If the budget field contained 12.50, the integer value of 12 would be returned.

INT(contact2.budget)

INT(12.50)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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# MOD( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Divides one numeric expression by another and returns the remainder (the amount left over) from the operation. |
| *Syntax:* | **MOD(<expN1>,<expN2>)** |
| *Parameters:* | **<expN1>** is the dividend (that which will be divided). |
| | **<expN2>** is the divisor (what it will be divided by). |
| *Example:* | If the budget field contained a value of 36 and the terms field contained a value of 10, both examples would return a numeric value of 6. |
| | MOD(contact2.budget, contact2.terms) |
| | MOD(36, 10) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

# PAYMENT( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the amount of each periodic payment on a fixed interest loan. |
| *System:* | **PAYMENT(<expN1>,<expN2>,<expN3>)** |
| *Parameters:* | **<expN1>** is the beginning principal of the loan. |
| | **<expN2>** is the fixed interest rate per period. If the interest rate is annual, divide by 12. |
| | **<expN3>** is the total number of payments. |
| *Example:* | PAYMENT(100000,0.105/12, 20*12) |
| | Returns: 998.38 |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# PV( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the present value of an investment. |
| *Syntax:* | **PV(<expN1>,<expN2>,<expN3>)** |
| *Parameters:* | **<expN1>** is the periodic payment. |
| | **<expN2>** is the periodic interest rate. If they interest rate is annual, divide by 12. |
| | **<expN3>** is the total number of payments. |
| *Example:* | PV(998.38,0.105/12, 20*12) |
| | Returns: 100000 |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# ROUND( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a numeric expression rounded to a specific number of decimal places.

*Syntax:* **ROUND(<expN1>,<expN2>)**

*Parameters:* **<expN1>** is the numeric value to round.

**<expN2>** is the number of decimal places to round to. If this value is 0, only the integer value before the decimal place is returned.

*Example:* If the value of budget were 100.65, the return value of both examples would be 100.7.

ROUND(contact2.budget,1)

ROUND(100.65,1)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# SIGN( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a numeric value of either 1, 0 or -1, depending on if the numeric expression were positive, zero, or negative.

*Expression:* **SIGN(<expN>)**

*Parameter:* **<expN>** the numeric expression to be evaluated.

*Examples:* If the value of 36 were found in the field terms, 1 would be returned, If the value of -36 (negative 36) were found in the field terms, -1 would be returned, and If the value of 0 were found in the field terms, 0 would be returned.

SIGN(contact2.terms)

SIGN(36)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# DMY( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a character value of the specified date in Day Month Year format.

*Expression:* **DMY**(<expD>)

*Parameter:* **<expD>** the date expression to be evaluated.

*Example:* This example will return the current date in the format “15 August 98”.

DMY(date())

Note that if your Display preferences settings have century turned on, the above expression would return the date in the format “15 August 1998”.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# GOMONTH( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the date that is a number of months before or after a given date. |
| *Expression:* | **GOMONTH(<expD>,<expN>)** |
| *Parameter:* | **<expD>** the date expression to be evaluated |
| | **<expN>** the number of months from the specified date. If the value is positive, GOMONTH( ) will return the value after the specified date. If the value is negative, it will return the value before the given date. GOMONTH( ) will also properly adjust for rollover across years, as well as end of month adjustments (GOMONTH({01-31-97},1) will return 02-28-97). |
| *Example:* | Returns the date value of today plus three months. |
| | GOMONTH(date(),3) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# MDY( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns a character value of the specified date in Month Day, Year format.

*Expression:* **MDY(<expD>)**

*Parameter:* **<expD>** the date expression to be evaluated.

*Example:* This example will return the current date in the format “August 15, 98”.

MDY(date())

Note that if your Display preferences settings have century turned on, the above expression would return the date in the format “August 15, 1998”.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# SECONDS( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the number of seconds since Midnight. The returned value has a resolution of 1 millisecond with the format being seconds.thousandths of a second. |
| *Expression:* | **SECONDS**() |
| *Example:* | This example will return the number of seconds that have passed since midnight. If the time were exactly 8:00 am, the value would be 3260.000 |
| | SECONDS() |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1}
Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1}
Examples of Common Expressions

## YES

Using YES in a logical field is the same as using .T.. YES will cause a logical field (i.e., checkbox) to be marked. It is the value of TRUE. See the section on IIF( ) for more information.

IIF(empty(contact2.acctrep), No, YES)

## NO

Using NO in a logical field is the same as using .F.. NO will not cause a logical field (i.e., checkbox) to be marked, or cause it to be unmarked. It is the value of FALSE. See the section on IIF( ) for more information.

```
IIF(empty(contact2.acctrep), NO, Yes)
```

## NOT

If the acctrep field is NOT empty, .T. will be returned. See the section on EMPTY( ) for more information.

NOT empty(contact2.acctrep)

The above expression can also be used in the following way:

!empty(contact2.acctrep)

Where the exclamation point takes the place of the word NOT.

## AND

If the name of the current contact is ‘Billy DePriest’ AND the acctrep for this record is ‘KMK’, .T. will be returned. AND is a conjunctive comparator, where both statements must be true for the whole statement to return true. If the contact2.acctrep didn’t equal KMK, or if the contact2.contact didn’t equal ‘Billy DePriest’, or both were not true, the whole expression would be false.

```
contact2.contact = ‘Billy DePriest’ AND contact2.acctrep = ‘KMK’
```

## OR

If the name of the current contact is ‘Billy DePriest’ OR the acctrep for this record is ‘KMK’, .T. will be returned. OR allows either statement to be true for the whole expression to be true. So if either contact2.contact equals ‘Billy DePriest’, or the contact2.acctrep field equals ‘KMK’, this expression would return a true value. It would take both statements to be false for this expression to return false.

contact2.contact = ‘Billy DePriest’ OR contact2.acctrep = ‘KMK’

## Parentheses ( )

Use of parentheses determines in what order an expression should be evaluated. In a mathematical expression, things that are within parentheses are processed first, and so the following expression would return 20, where without the parentheses, the value would be 16 (multiplication is done before addition).

(1+3)*5   (one plus three, and the result of that multiplied by 5)

The same logic can be applied to filters using ANDs and ORs, where you want to process the ORs together and then combine it with another statement using an AND, like the following:

(contact1.state='CA' OR contact1.state='WA') AND contact2.acctrep='KMK'

With the parentheses, this filter would find all of KMK's records in California and Washington. Without the parentheses, the filter would find all the records in California, or all of KMK's records in Washington.

## Lesser than <

This example determines whether or not the contents of the lastcall field is of lesser value than the current date. If the item on the left is less than the item on the right, this will return true. If the item on the left is equal or greater than the item on the right, this will return false.

contact2.lastcall < date()

## Greater than >

This example determines whether or not the contents of the lastcall field is of greater value than the current date. If the item on the left is greater than the item on the right, this will return true. If the item on the left is equal or less than the item on the right, this will return false.

```
contact2.lastcall > date()
```

## Equal =

This example determines whether or not the contents of the lastcall field is of equal value to the current date.

contact2.lastcall = date()

You should be aware that the equal only compares that which it is given to compare. So, if you have a character field that can have values like AMT, AMTR, and AND, if you have a filter that states:

contact2.status = ‘AMT’

All those records with both AMT and AMTR will be found, since the equals was only given the AMT to look for. If you want only those that equal AMT, look into the exact equals.

## Not Equal

This example determines whether or not the contents of the lastcall field is not equal to the current date.

```
contact2.lastcall # date()
```

or

```
contact2.lastcall <> date()
```

## Less than or Equal to <=

This example determines if the contents of the lastcall field is of lesser or equal value to the current date. If the item on the left is less than or equal to the item on the right, this will return true. If the item on the left is greater than the item on the right, this will return false.

```
contact2.lastcall <= date()
```

## Greater than or Equal to >=

This example determines whether or not the contents of the lastcall field is of greater or equal value to the current date. If the item on the left is greater than or equal to the item on the right, this will return true. If the item on the left is less than the item on the right, this will return false.

```
contact2.lastcall >= date()
```

## Exactly Equal ==

This example determines whether or not the contents of the contact field are an exact match to the provided character string. Note that length and content both must match.

contact2.contact == ‘Billy DePriest’

This can also be used if you have a field that contains values such as AMT, AMTR and AND. If you only want to find those records that have AMT, use the following expression:

trim(contact2.status) == ‘AMT’

This will only find those records which have AMT and not AMTR in the status field.

## .T. (True)

If the acctrep field is empty, .T. is returned. This is the value for True. See the section on IIF( ) and on EMPTY( ) for further information.

```
iif(empty(contact2.acctrep), .T., .F.)
```

## .F. (False)

If the acctrep field is not empty, .F. is returned. This is the value for False. See the section on IIF( ) and on EMPTY( ) for further information.

```
iif(empty(contact2.acctrep), .T., .F.)
```

# EMPTY( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Will return true if a given expression is empty.

*Expression:* **EMPTY(<exp>)**

*Parameter:* **<exp>** can be any field type. The following examples will return a true value if used for the expression in the EMPTY( ) function:

| | |
|---|---|
| Character: | no characters contained in the field |
| Numeric: | 0 (zero) |
| Date: | Null (as though you did a CTOD('') |
| Logical: | False ( .F. ) |
| Memo: | Empty (no contents) |
| General: | Empty (no OLE object) |

*Example:* If no data is found in the contact field, .T. will be returned.

EMPTY(contact2.contact)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# INLIST( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns true if an expression matches one in a series of matching type expressions.

*Expression:* **INLIST(<exp1>,<exp2>[,<exp3> ...])**

*Parameter:* **<exp1>** is the expression to be searched for in the following expressions

**<exp2>** is the first of a series of expressions (up to 24) that **<exp1>** must match in order for the function to return a true value.

*Example:* If the state field for the current contact record is CA, .T. will be returned in the following expression

INLIST(contact1.state,'CA','WA','HI',’OR’,’AK’)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# SEEK( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns a true value if the specified value is found when searching through the currently selected indexed table. If the value is found, the record pointer is positioned on the first matching record. |
| *Expression:* | **SEEK(<exp>[,<expN>/<expC>])** |
| *Parameter:* | **<exp>** is the expression to search for in the index key |
| | **<expN>** is the numeric reference to another work area that has an opened table |
| | **<expC>** is the name of the work area that has another open table |
| *Example:* | If an the current database has an index on the account rep field, and an account representative id of “LME” is found, .T. is returned. |
| | SEEK(‘LME’) |

This function may return unexpected results if you are not very familiar with FoxPro and it’s functions. If you are not familiar with FoxPro or dBase type functions, it is not recommended that you use this function.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## ZIP Code Related Functions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

ZIP Code related functions require that the ZIP Code Lookup add-on product to be installed. Specific data requirements are indicated for each function.

GETDISTANCE Returns the straight-line distance between two ZIP codes.
GETZIPCODE Returns the ZIP code for a specified city.
GETZIPINFO Returns the area code, city, county, and/or state for a specified ZIP code.
VERIFYZIPINFO( )

# GETDISTANCE( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the straight-line distance between the center point of two ZIP codes. The actual driving distance will vary. This function requires the ZIP Code Lookup add-on with a data file dated 03/1999 or later. |
| *Expression:* | **GETDISTANCE(<exp1>,<exp2>)** |
| *Parameter:* | **<exp1>** is the first ZIP code |
| | **<exp2>** is the second ZIP code |
| *Example:* | GETDISTANCE(60610,92069) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# GETZIPINFO( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

*Description:* Returns the area code, city, county, and/or state based on ZIP code. If more than one is specified, they are seperated by the pipe (|) character. This function requires the ZIP Code Lookup add-on.

*Expression:* **GETZIPINFO(<expC>,<expR>)**

*Parameter:* **<expC>** is the field containing the zip code to be looked up

**<expR>** is the item(s) to be returned. Use the following codes:

| | |
|---|---|
| A | Area Code |
| C | Primary City in the ZIP Code |
| O | County |
| S | State |

Enclose the codes in quotation marks. If the second parameter is omitted, A will be used.

*Example:* GETZIPINFO(contact1.zip,"CS")

This example will return the city and state for the specified ZIP code.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

# GETZIPCODE( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Returns the ZIP code for a specified city. This function requires that the ZIP Code Lookup add-on be installed. |
| *Expression:* | **GETZIPCODE(expC>,<expS>)** |
| *Parameter:* | **<expC>** is the field containing the name of the city |
| | **<expS>** is the field containing the name of the state where the city is located |
| *Example:* | GETZIPCODE(contact1.city,contact1.state) |
| | If the city in this example were Salem, and the state MA, the function would return 01970. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## VERIFYZIPINFO( )

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| *Description:* | Validates a combination of city, state, and ZIP code. This function requires that the ZIP Code Lookup add-on be installed. |
| *Expression:* | **VERIFYZIPINFO(expC>,<expS>,<expZ>,<expR>)** |
| *Parameter:* | **<expC>** is the field containing the name of the city |
| | **<expS>** is the field containing the name of the state where the city is located |
| | **<expZ>** is the field containing the ZIP code |
| | **<expR>** Indicates the return type. Use the following codes: |
| | L for a logical return, .T. or .F. |
| | T to return OK if there is no error, or the text of the error message if the other parameters do not match. |
| | If this parameter is not specified, L will be used. |
| *Example:* | VERIFYZIPINFO(contact1.city,contact1.state,contact1.zip,"L") |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Detailed_Listing_of_Command_Functions)<<1} Detailed Listing of Command Functions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## Note for Expression Builder

The Expression Builder used in the Report Generator looks slightly different from the one shown here, but it functions in exactly the same way.

## TeleMagic Accessories

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Accessoriesï¿½ ï¿½ ï¿½ )<<1}

The spell checker and calculator are accessories which can be used throughout TeleMagic.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½CALC_Spell_Checker)<<1} Spell Checker

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½CALC_Calulator)<<1} Calculator

# Spell Checker

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Accessoriesï¿½ ï¿½ ï¿½ )<<1}

TeleMagic has a built-in spell-checking feature that lets you to correct spelling errors in virtually any type of character-based field, including fields in the Contact Manager, dialog boxes, memo fields, e-mail, wireless messages, fax comments, and call notes.

This is an internal TeleMagic feature that is not applicable in linked word processors. The supported word processors have their own spell checkers included.

## To Use the Spell Checker:

1. At any area where the Spell Checker is available, place your cursor in the field to be checked.

2. From the **Office** menu, select **Spell Check**.

**or** Click the Spell Check icon.

**or** On the keyboard, press CTRL+S.

If the spell checker finds a word that is not in its dictionary, the Spell Check dialog box will appear.

The `Not Found:` field will show the questionable word.

3. If the questionable word is not a misspelling (for example in the case of a person's name), use the following guidelines:

- If you do not want do anything about this occurrence of the word, click **Ignore**.
- If you know there will be multiple occurrences of the word in the text being checked, click **Ignore all** to skip every occurrence of the word.
- If you want to add the word to your custom dictionary, click **Add** and the word will be added to your custom dictionary.

The word will be left as it is and the spell checker will move on to the next misspelled word if there is one. If you selected **Ignore**, the next time the Spell Checker encounters the word, it will again offer it as a misspelling. If you selected **Ignore all**, the word will not be offered again in this session.

**or** If the word is spelled incorrectly, type the correct spelling in the `Replace With:` field and click **Change**.

- **or** If your Spell Checker Options are set to have TeleMagic automatically suggest possible spelling alternatives, highlight the correct spelling in the `suggestions` list and click **Change**.

- **or** If your Spell Checker Options are not set to have TeleMagic automatically suggest possible spelling alternatives, click **Suggest**. A list of spelling alternatives will appear in the `suggestions` list. Highlight the correct spelling and click **Change**.

**or** If none of the suggestions are correct, highlight the closest and click **Suggest**. More possible spellings, based on the highlighted suggestion, will be added to the end of the list. You will need to scroll to the end of the list to access these new suggestions. You can repeat this as many times as you like.

If you believe that there are more places where this misspelling occurs, you can click **Change All**. This will replace every occurrence of the misspelling with the specified spelling.

If you would like the spell checker to automatically make the indicated change whenever it encounters the misspelling, click **Auto Correct**.

**Warning!**

When you add a word to the Auto Correct dictionary, Spell Check will replace it without any indication.

The word(s) will be replaced (as reflected in the text area) with the suggested word and the Spell Checker will continue to check the rest of the field (if applicable).

A message will appear informing you when the Spell Checker has finished with the field. The total words checked will be indicated.

4. Click **OK**.

The Spell Checker will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALC_Spell_Checker_Options)<<1} Spell Checker Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALC_Maintaining_Custom_Dictionaries)<<1} Maintaining Custom Dictionaries

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALC_TeleMagic_Accessories)<<1} TeleMagic Accessories

# Spell Checker Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Accessoriesï¿½ ï¿½ ï¿½ )<<1}

The Spell Checker comes with customization features that let you control how it works. You can ignore words if all of its letters are capitals, or if they contain any numbers. (For more information on the custom dictionaries, see Maintaining Custom Dictionaries.)

## To Set Spell Checker Options:

1. From the **Office** menu, select **Maintenance**, **Spell Checker Preferences**.

   The Spell Checker Options dialog box will appear.

2. Mark `Ignore Uppercase words` if you want the Spell Checker to ignore words which are entirely capitalized.
3. Mark `Ignore Words Containing Numbers` to skip any words that contain numbers.

4. Mark `Auto suggest` to have the spell checker offer a list of alternative spelling suggestions for questionable words.
5. Mark `Recheck replaced words` to check any words that you replace by typing the replacement in the `Replace With:` field of the Spell Check dialog box. Words drawn from the suggested list are not rechecked.
6. When satisfied with your preference settings, click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALC_Maintaining_Custom_Dictionaries)<<1} Maintaining Custom Dictionaries
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALC_TeleMagic_Accessories)<<1} TeleMagic Accessories

# Maintaining Custom Dictionaries

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Accessoriesï¿½ ï¿½ ï¿½ ï¿½ )<<1}

TeleMagic lets individual users create custom dictionaries. You can add words to the dictionary during a spelling check and you can access the dictionary and add or remove words directly.

## To Edit Your Dictionary Manually:

1. From the **Options** menu, select **Maintenance**, **Spell Checker Dictionary**.
2. The Dictionary dialog box will appear.
3. To add a word to the dictionary, click **Add**.

   The Edit Dictionary dialog box will open.
4. Enter the new word in the field and click **OK**.

   The new word will be added to the user's custom dictionary.
5. To delete a word from the dictionary, locate the word on the list, highlight it, and click **Delete**.
6. To edit a word that already exists in the custom dictionary, locate it on the list, highlight it, and click **Edit**.

   The Edit Dictionary dialog box will open with the selected word in the text field. Make the required changes and click **OK**.
7. When you are finished working with the dictionary, click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½CALC_Spell_Checker)<<1} Spell Checker
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½CALC_Spell_Checker_Options)<<1} Spell Checker Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½CALC_TeleMagic_Accessories)<<1} TeleMagic Accessories

# Calculator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Accessoriesï¿½ ï¿½ï¿½ )<<1}

TeleMagic is equipped with a handy “pocket” calculator which can be opened from almost any part of the program. You can edit, cut, copy, or paste values in the calculator display panel to and from TeleMagic or other Windows programs.

You can access the calculator from a modal screen by adding the Calculator tool to the toolbar. Be aware that if you open the calculator from a modal window, then click back on the window, you will have to click the Calculator tool again to return focus to the calculator.

## To Use the Calculator:

1. From the **Help** menu, select **Calculator**.

   The calculator will open.

2. With the mouse, click the calculator buttons to perform calculations.

**or** With the keyboard, use the following keystroke equivalents to perform calculations:

| Calculator Button | Keystroke | Meaning |
|---|---|---|
| MC | Z | Memory Clear. |
| MR | R | Memory Recall. |
| M+ | A | Add to Memory. |
| M- | S | Subtract from Memory. |
| √ | Q | Replace the entry with its square root. |
| ± | N | Make an entry a positive or negative number. |
| % | % | Change an entry to a percentage. |
| All Other | As Displayed | |

## To Close the Calculator:

☞ Double-click the Calculator control box (located in the left-hand corner of the Calculator’s title bar).

**or** Press CTRL+F4.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALC_TeleMagic_Accessories)<<1}

## Note for Step 3

The list of suggestions will be put into order starting with the closest phonetic match.

## Note for Step 3

see To Set Spell Checker Options), for information on setting whether or not TeleMagic offers suggested spelling alternatives.

## Hint for Step 3

There is a slight trade-off in system performance with `Auto suggest` selected, because TeleMagic must generate a list of possible spellings for every questionable word. On most machines, the time it takes to generate the list will not be detectable. On slower machines, there may be a very slight pause while the list is generated. If you are working on a slower machine, you may want to consider leaving `Auto suggest` blank, and using the **Suggest** button on the main Spell Checking screen when necessary.

## Note for Step 4

The more suggestions TeleMagic is required to offer, the longer it will take to generate the list. On most machines, this will not be noticeable. On some slower machines, there may be a slight pause as the list is generated. Consider limiting the number of suggestions accordingly.

## Note for Step 5

If you are a supervisor user, all existing groups will be included on this list. This allows you to set up the custom dictionaries for the groups. Non-supervisor users whose spelling preferences are set to User Group will not be able to add to or change the words in the group's custom dictionary.

## Note for Step 2

The dictionary you will be editing is determined by your `Custom Dictionary in use:` setting in Spell Checker Preferences. See Spell Checker Options for information on selecting the dictionary.

# Activity Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Opening_the_Activity_Manager)<<1}Opening the Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Scheduling)<<1} Activity Scheduling

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_Activities_To_Dos)<<1} Viewing Activities & To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_the_Calendar_Views)<<1} Working with the Calendar Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1} Handling Alarms

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Controlling_Others_Access_to_Your_Calendar)<<1} Controlling Others Access to Your Calendar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Viewing_and_Scheduling_on_Others_Calendars)<<1} Viewing and Scheduling on Others' Calendars

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports

# Activity Manager Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

There is very little actual setup needed with the Activity Manager. For the most part, you can simply access your calendar and begin to use it. TeleMagic does provide Activity Preferences in case you would like to configure any areas of the Activity Manager to your specifications.

If you will be using resources, or want to establish which days are holidays, some setup is required to create the list of resources and holidays.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Activity_Preferences)<<1} Activity Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Holiday_Maintenance)<<1} Holiday Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Resource_Management)<<1} Resource Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

## Resource Management

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Resource Managementï¿½ ï¿½ ï¿½ )<<1}

You may need to schedule use of the resources that are frequently in demand. This will prevent conflicts with multiple users trying to access the same equipment or space at the same time. Resource Management allows users to create an activity that will reserve a resource for the duration of the activity. Before creating an activity that reserves a resource, you need to establish a list resources.

Access to add and edit resources is limited to supervisor users. If you are not a supervisor user, you will only be able to print reports on existing resources.

To Establish a List of Resources:
To Maintain the List of Resources:
To Print the List of Resources:
Using Resources

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# To Establish a List of Resources:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Resource Managementï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **Resources**.

   The Resource Maintenance selection box will open.

2. Click **Add**.

   The Add Resource dialog box will open.

3. Enter a descriptive name for the resource in the `Resource:` field.

4. In the `Hours Available:` area, enter the time span during which the resource is available in the `From:` and `To:` fields, or click the Time Picker () icons and select the available times.

**or** If your resource can be accessed 24 hours a day on the selected days, check the `Always Available` box.

5. In the `Days Available:` area, mark the days on which the resource may be used. For example, you may want to unmark the check boxes corresponding to your established weekend days.

6. When satisfied with your selections, click **OK**.

**or** To close this dialog box without saving the resource, click **Cancel**.

7. Repeat steps 2 through 6 for each resource you would like to add.

**or** If you would like to quickly add a resource with the selections for a previously created resource offered as a default, click **Copy** at the Resource Maintenance selection box.

   The Copy Resource dialog box will open.

8. Give the new resource a unique name.

9. Click **OK** to save the copied resource.

**or** Click **Cancel**. The copy of the resource will not be saved.

To adjust the availability settings of a resource, or delete a resource, see To Maintain the List of Resources.

To print the list of resources, or a resource's schedule, see To Print the List of Resources.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# To Maintain the List of Resources:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Resource Managementï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **Resources**.

   The Resource Maintenance selection box will open.

2. If you would like to change the description or availability of an existing resource, highlight it on the list and click **Change**.

   The Edit Resource dialog box will open.

3. Adjust the settings as necessary.

4. When satisfied with your selections, click **OK**.

**or** To close this dialog box without saving the resource, click **Cancel**.

You will be returned to the Resource Maintenance dialog box.

5. If you would like to remove a resource from the list, highlight it and click **Delete**.

   A Delete Resource confirmation will appear.

6. Click **Yes** and the resource will be deleted.

**or** Click **No** to retain the resource.

7. Click **Close** to close the Resource Maintenance selection box.

To add a new resource, see To Establish a List of Resources.

To print the list of resources, or a list of any activities that are currently reserving the resource, see To Print the List of Resources.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# To Print the List of Resources:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Resource Managementï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **Resources**.

   The Resource Maintenance selection box will open.

2. Click **Reports**.

   The Resource Reports dialog box will open.

3. Choose the `List` radio button if you would like to print a list of all resources with their availability.

**or** Choose the `Schedule` radio button to print a report that lists when the resources are in use and by whom. (This is useful if you have a conflict when trying to use the resource in an activity and need to know who is using it at the specified time.)

4. If you selected `Schedule` in step 3, above, use the `Dates:` area to specify the date range on which you would like to report. Enter the dates in the `From:` and `To:` fields, or use the Date Picker icons to select the dates from a Go To Date dialog. Select the resource you want to access from the `Resource:` drop-down window.

5. If you would like to include all resources in your report, leave `All Resources` selected in the `Resource:` field.

**or** If you would like to report on a specific resource, select it from the drop-down list.

6. If you want to preview the report, click the **View** button. The Page Preview dialog box will open. (See Page Preview for instructions on using the Page Preview window.)

7. Click **Print** and the report will be sent to the printer.

To add a new resource, see To Establish a List of Resources.

To adjust the availability settings of a resource, or delete a resource, see To Maintain the List of Resources.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Holiday Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ï¿½ )<<1}

Holiday Maintenance is used to red-flag holidays on your Activity Manager schedule.

## To Set Up a List of Holidays:

1. From the **Options** menu, select **Maintenance**, **Holidays**.

   The Holiday Maintenance selection box will open.

2. To add a new holiday to the list, click **Add**.

   The Holiday Record dialog box will open.

3. Enter the date of the holiday in the `Date:` field.

4. Enter a description of the holiday in the `Description:` field.

5. If you would like to receive a warning when attempting to schedule an activity on this holiday, select the `Warn when scheduling on a holiday` radio button.

**or** If it does not matter if activities are scheduled on this date, select the `Allow scheduling on a holiday` radio button.

6. If this holiday occurs on the same date annually, mark the `Recurring Annually` check box. Select the number of years you would like this holiday to repeat using the `years` list.

7. Click **OK** to save this holiday.

   You will be returned to the Holiday Maintenance selection box.

8. Repeat steps 2 through 6 for each holiday you would like to set up.

**or** If you would like to add a holiday based on an existing one, highlight the existing holiday and click **Copy**.

   A copy of the holiday will be made. It will be named `Copy of` followed by the original holiday name. For example, copying the Labor Day holiday would create `Copy of Labor Day`. This holiday will have the same date and settings as the original. See To Maintain the List of Holidays. for instructions on editing the name or settings of the copied holiday.

9. When satisfied with the list of holidays, click **Close** to exit.

To maintain the list of holidays you have created, see To Maintain the List of Holidays.

To print your list of holidays, see To Print the List of Holidays.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# To Maintain the List of Holidays:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **Holidays**.

   The Holiday Maintenance selection box will open.

2. To change the details of an existing holiday, highlight it on the list and click **Change**.

3. The Holiday Record dialog box will open displaying details on the holiday.

4. Edit the holiday as necessary following the guidelines in steps 3 through 7 under To Set Up the List of Holidays.

5. Click **OK** to save the changes to this holiday.

**or** Click **Cancel** to discard the changes and retain the original settings.

You will be returned to the Holiday Maintenance selection box.

6. If you would like to remove a holiday from the list, highlight it and click **Delete**.

   A Delete Holiday dialog box will appear.

7. To delete the holiday that is currently highlighted, select the `Currently Highlighted` radio button.

**or** To delete every holiday in a date range, select the `Date Range` radio button and enter the dates in the `Start Date` and `End Date` fields.

8. Click **Delete**.

   You will receive a message asking you to confirm your decision to delete.

9. Click **Yes** and the holiday will be deleted.

**or** Click **No** to retain the holiday.

To add holidays to the list, see Holiday Maintenance.

To print your list of holidays, see To Print the List of Holidays.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

## To Print the List of Holidays:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **Holidays**.

   The Holiday Maintenance selection box will open.

2. Click **Print**.

   The list of all holidays will be sent to your default printer.

To add holidays to the list, see Holiday Maintenance.

To maintain your list of holidays, see To Maintain the List of Holidays.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1} Activity Manager Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Opening the Activity Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic includes an Activity Manager, which is integrated with your Contact Manager for easy contact-related scheduling.

## To Start the Activity Manager:

1. On the Toolbar, click the View Your Schedule tool: 

**or** From the **Activity** menu, select **View Activities**.

The Activity Manager will open to today's date and time.

2. If you want to start adding To-Dos and activities immediately, see Activity Scheduling.

**or** If you want to learn how to quickly review the Activity Manager screen in day, week and month views, see Working with the Calendar Views.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

# Activity Scheduling

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Events scheduled in the Activity Manager fall into two categories: Activities and To-Dos. Activities are specific appointments on a set date and time. For example, a meeting with a client at 3:00 p.m. on Tuesday. To-Dos are events with no set date or time. For example, preparing a budget for an upcoming project. It does not matter when you do it, as long as it is completed by Thursday.

To add a To-Do, see Adding To-Dos

To add an activity, see Scheduling Activities (Phone Calls, Appointments, and Meetings)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

# Adding To-Dos

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

## To Add a To-Do:

1. Right-click anywhere on the To-Do list and select **Add a To-Do...** from the menu which opens.

**or** Left-click anywhere in the yellow To-Do area and click the Add button: 

The To-Do dialog box will appear.

2. Type a description of the To-Do in the `Description` box. Type it exactly as you want it to appear on your daily schedule. The description may be up to 50 characters long.

   **Example:** Seminar Notes.

3. Type the due date in the `Date` box, or click the date picker icon and choose a date from the Go to Date dialog box.

4. The `Direction` radio buttons can have any meaning you want to assign to them. Use them to further categorize your To-Do.

   **Examples:** Choose `In` if the To-Do is an in-house meeting; `Out` if it is a meeting with a contact; or choose `In` if the To-Do is company business; `Out` if the To-Do is a personal item.

5. In the `Type` field, enter the category of the item you are adding.

6. You can leave the `Status` field blank, or type in a user-defined status for the item. (Once you mark the item as completed, the word `Completed` will appear in this field, overwriting any entry you have made.)

7. Type a priority (1,2, or 3) in the `Priority` box or select the priority from the drop-down list. (To-Dos will be organized on the list with Priority 1 To-Dos at the top of the list, followed by Priority 2, then Priority 3. The priority of each To-Do is indicated to the left of the To-Do.)

8. If you would like the To-Do to appear on your calendar only on the due date and beyond, mark the `Show only when due` check box. (This is useful for To-Do items that cannot be completed before the due date.)

**or** If you would like to be alerted of the To-Do before it is actually due, unmark this check box. The To-Do will appear every day on your calendar until it is completed.

9. If you want to send yourself or the user to whom the To-Do is assigned a Wireless Message, mark the `Page` checkbox. See Sending Messages from the Activity Manager for more information on sending messages based on activities or To-Dos.

10. To include a comment with the To-Do, click the **Comments** tab to open the Comments page.

    Type any desired notes in the `Comments` box. Click **Stamp** to precede the entry with a date, time, and User ID stamp. (The comment will not appear on your schedule. It can be accessed at any time from Day at a Time or Week at a Time views by marking the `More Info` check box on the calendar.)

11. Review the following options for linking and assigning To-Dos. When you have finished, click the **Save** button.

To link the To-Do to a contact, see Associating To-Dos and Scheduled Activities to Contact Records.

If you want to assign the To-Do to another user, see the topic Assigning Activities and To-Dos . (Only users who have granted you scheduling rights to their calendars will appear on this list. See the topic Multi-User Calendars for more information.)

If you did not assign the To-Do item to another user, it will appear on your daily planner with the priority indicated to the left. The color of each To-Do will indicate how long until the To-Do is due. They will be in black font until the day before they are due, at which time they will turn blue. On the day they are due, they will be red. When the To-Do is past-due, it will be in red font with a number to the right indicating how many days overdue the item is.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1} Scheduling Activities (Phone Calls, Appointments, and Meetings)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Scheduling Activities (Phone Calls, Appointments, and Meetings)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

**Note**

To schedule an activity directly from the Contact Manager, see: Scheduling Activities in the Contact Manager

## To Schedule an Activity (e.g., a Phone Call or Meeting):

1. In day or week view, double-click on an empty time slot in your daily schedule on your appointment start time or highlight the appropriate time and click the Add button:
 Skip to step 2.

**or** If there is already an activity scheduled at the desired time, highlight the time and click the Add button to add a new activity to the same time slot as an existing activity. (Double-clicking will open an existing activity for editing, if present.)

The Activity dialog box will open.

2. Type a description of the activity in the `Description:` field. Type it exactly as you want it to appear on your daily schedule.

3. Type the due date (if different than that displayed) in the `Date:` field. (Type only the numbers: TeleMagic will add the formatting characters for you.)

**or** Click the Date Picker icon to choose a date from the Go To Date dialog box.

4. Type the due time (if different) in the `Time:` field.

- If your Display preferences are set to the 12-hour clock, enter the time in the format *h:mm* followed by *a* if before 12:00 noon, or *p* if after 12:00 noon. (See the Time Format topic for details.)

**Example:** 3:00p.

- If your Display preferences are set to the 24-hour clock, enter the time in the format *hh:mm*.

**Example:** 15:00.

**or** Click the Time Picker icon to select the time from the Select Time dialog box.

5. Type the estimated duration (that is, how long this scheduled activity will last) in minutes in the `Duration:` field, or click the spinner arrows and TeleMagic will enter the duration for you.

6. The `Direction:` radio buttons can have any meaning

you want to assign to them. Use them to further categorize your activity.

**Examples:** Choose `In` if the activity is an in-house meeting; `Out` if it is a meeting with a contact; or choose `In` if the activity is company business; `Out` if the activity is a personal item.

7. Enter the activity type (such as meeting, appointment, phone call) in the `Type` field.

8. You can leave the `Status` field blank, or type in a status for the item. (If you mark the item as completed, the word `Completed` will appear in this field, overwriting any existing entry.)

9. Click the `Priority:` list arrow and choose a priority for the activity. (Setting a priority for an activity is for your reference only and will not affect how the activity appears on your schedule.)

10. If desired, mark `Alarm` to turn on an alarm to remind you of your scheduled activity.

**or** Leave `Alarm` unmarked if you do not want to be alerted when the activity is due.

11. If you have set an alarm, type any desired lead time in minutes (that is, the amount of warning time prior to the scheduled activity) for your alarm in the `Lead Time` field.

**or** Click the spinner arrows and TeleMagic will enter the lead time for you.

12. If you would like a wireless message sent to the user to whom this activity is assigned, mark the `Page` check box. When the activity is saved, the Wireless Messaging dialog box will open. See Sending Messages from the Activity Manager for instructions on sending the message.

13. To add a comment to the activity, click on the **Comments** tab to open the Comments page.

Type any desired note to yourself in the `Comments` box. Click **Stamp** to precede the entry with a date, time, and User ID stamp. (The comment will not appear on your schedule. It can be accessed at any time from Day at a Time view by highlighting the activity and marking the `More Info` check box on the calendar.)

If this activity is linked to a contact, and you would like to paste Key Field information into the `Comments` field, click **Paste Contact Info**.

21. If you need to assign a resource to this activity (for example, if it is for a meeting that will require use of the

conference room), click the **Resource** button and follow the instructions under Using Resources.

22. When satisfied with your activity, click **OK**. The activity will appear on your calendar, and/or on the calendar of the user(s) to whom it was assigned.

If the activity is related to a contact, you can link the activity to the contact's record in the Contact Manager. This will allow you to quickly access contact information from the activity, and access the activity from the contact's record. See Associating Activities and To-Dos with Contact Records .

To assign this activity to another user, see Assigning Activities and To-Dos . (If a user has not assigned you scheduling rights to his or her calendar, that user will not appear on this list. For more information, see the Multi-User Calendars topic.)

To cause this activity to occur at regular intervals (for example, a monthly meeting), click the **Recurring** tab and follow the instructions under Recurring Activities.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Adding_To_Dos)<<1} Adding To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Associating To-Dos and Scheduled Activities to Contact Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½ CALENDX_Hint_for_Associating_Activities_to_Contact_Records)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Many items on your To-Do list and schedule are not associated to any particular contact. A weekly sales meeting; an annual budget review; a quarterly dental exam are all events you might need to schedule, but they are not related to any particular contact.

However, many scheduled items *are* related to a particular contact. A call to a lead; a meeting with a customer; time set aside to review contracts for a particular account are all examples of events which could be tied to a specific contact record.

You can associate events to a contact record when you create them, or later, after you have more information about them.

## To Link a To-Do or Activity to a Contact Record:

1. Add an activity following the instructions under Scheduling Activities (Phone Calls, Appointments, and Meetings)

**or** To edit an existing activity double-click the activity or highlight it and click **Edit**.

2. Click the **Link** tab. If the contact to which you want to link is the current contact, select the `Current Contact` radio button.

**or** Select `Other Contact`.

3. To search for a record in the current database and level, enter the information you are going to search for in the `Search` field and click **Search**.

   The first record matching your search criteria will be linked to the activity.

**or** To search for a record using browse, click **Browse Contacts**. Select the record you would like to link.

**or** To search for a record in a different database or level, click **Advanced Search**.

4. From the `Database:` drop-down list, select the database containing the contact record.

   **Example:** Documentation Database

5. From the `Level:` drop-down list, select the level containing the contact record.

   **Example:** Contact

6. Use the drop-down `Index:` list to select an index. Make

sure the selected index is based on the field containing the data you will use to search for the appropriate record.

**Example:** Contact First Name

7. In the `Search for:` field, enter the data you would like to use to locate the record.

   **Example:** Harold

8. Click **Search**.

   The first record matching your search criteria will be linked to the forecast.

**or** Click **Browse** to select the record from a browse window.

   The browse window will display all of the records on the selected level of the selected database in order of the specified index. The record most closely matching your search subject will be highlighted.

9. Double-click the record to which you want to link the activity.

   The Browse window will close, linking the selected contact to the activity.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_To_View_Linked_Contact_Information)<<1} To View Linked Contact Information:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Viewing Linked Contact Information:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Contact information for contact records linked to activities is based on your Key Fields selections. If you have not yet set up key fields, see the Key Field Preferences topic.

## To View Linked Contact Information:

1. Open the Activity Manager, highlight the Activity, and click on the Edit button: 

**or** Open the Activity Manager and double-click the activity.

The Activity dialog box will open.

2. To view information about the linked contact, click on the **Link** tab.

The Link page will open. The linked contact's information and the contents of its notepad will be displayed on the left side of the page. This is a view-only display.

3. Click **OK** or **Cancel** to close the Activity dialog box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Associating_To_Dos_and_Scheduled_Activities_to_Contact_Records)<<1} Associating To-Dos and Scheduled Activities to Contact Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Recurring Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

A recurring activity is one activity scheduled to occur more than once. You can easily make any activity a recurring activity—all you need to do is define how frequently it should repeat. Each part of the recurring activity will be placed in you calendar just as if it was a separate activity.

When a recurring activity is scheduled, each occurrence will appear on your calendar on the appropriate day. The titlebar of the Activity dialog box will reflect the fact that the activity is part of a series of recurring activities.

## To Schedule a Recurring Activity:

1. Follow steps 1 through 15 under Scheduling Activities (Phone Calls, Appointments, and Meetings).

2. Click **Recurring**.

   The Recurring Activity page will open.

3. From the `Frequency:` list, choose how frequently you would like to repeat the activity.

4. From the `Duration:` list, choose for how long the activity should recur.

**or** In the `until` field enter the date that marks the end of the recurring activity, or click the Date Picker icon to select the date from a Go to Date dialog box.

5. Choose from the `Conflict resolution` radio buttons, to determine how the activity should be scheduled in the event that a conflict occurs.

6. In the event a recurring activity falls on a weekend or a holiday, choose:

   - `Schedule on weekends and holidays` if you would like the activity scheduled regardless.
   - `Skip weekends and holidays` if you would like to not schedule an activity for those days.
   - `Slide weekend or holiday activities to nearest workday` if you would like to schedule the activity on the next available working day.

7. When finished, click **Set**.

   You will be returned to the Activity dialog box.

8. Click **Save**.

   There will be a pause as the activity is added to each day specified.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

# Group Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

## To Schedule a Group Activity:

1. Follow steps 1 through 15 under Scheduling Activities (Phone Calls, Appointments, and Meetings).

2. Click on the **Assignment** tab.

   The Assignment Page will open.

3. Select the **Assign to Multiple Users or Groups** radio button.

   All of the users who have either granted you scheduling access to their calendars or who have the selected the `Allow all users Group Scheduling rights to your calendar` check box in Activity preferences will be available for assignment. To see the full list of users and groups to whom you can assign activities, open the tree view by clicking the plus sign. (See Multi-User Calendars for more on granting activity permissions. See Allow All Users Group Scheduling Rights to Your Calendar for more on this Activity preference.)

4. Assign the activity by marking the checkbox associated with the user or group to whom the activity will be assigned. To assign the activity to all available users and groups, mark the **All Users** checkbox.

5. Repeat this process for each user or group you would like to receive the activity. Skip to step 7 . You can assign the activity to any combination of users and groups.

6. If you would like to exclude any users who were included as members of a group, unmark the user’s checkbox.

7. When satisfied with the list of users, click **OK** to schedule the activity and close the Activity dialog box.

8. Mark the **Page** checkbox to page the users who have been assigned the activity. Only users who have pager information will be notified.

9. Mark the **Notify** checkbox to notify users with a popup message that they have been assigned a group activity. Users will only be notified once: if you edit the activity, the users will not be informed of the change.

**or** Open other pages to further define the activity.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_To_Edit_a_Group_Activity)<<1} To Edit a Group

Activity:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_To_Find_an_Available_Time_Slot)<<1} To Find an Available Time Slot

# To Find an Available Time Slot

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

The Activity Manager can quickly determine when all of the users and resources assigned to an activity will be available at the same time.

## To Find an Available Time Slot:

1. Follow steps 1 through 15 under Scheduling Activities (Phone Calls, Appointments, and Meetings).
2. Click on the **Availability** tab.

   The Availability page will open.
3. Enter the range of dates on which the activity can be scheduled in the `Start Date:` and `End Date:` fields.
4. Enter the time range during which the activity can be scheduled in the `Start Time:` and `End Time:` fields.
5. If necessary, edit the time in the `Duration` field on the Activity page. TeleMagic will search for blocks of free time large enough to accommodate the specified duration. (i.e., If your duration is 1 hour, TeleMagic will locate any times on your schedule when you have an entire hour free.)
6. Select the combination of users and resources to be searched from the drop-down list.
7. Click **Search**.

   The search will commence. (Depending on your search criteria, this may take a few seconds to a few minutes.) The window will show the times in which all selected users are available.

   This list will display availability according to your selected search criteria. (i.e., If you have elected to available slots at 15 minute intervals starting at 2:00 p.m., the list will show 2:00, 2:15, 2:30, and 2:45.) Each user in the group will be listed, followed by any selected resources. Time slots where the user or resource is already scheduled for an activity will be indicated by being colored red. If you select a time slot where the user or resource is already scheduled for an activity, the red block will be replaced by the word 'NO'.

16. Highlight the time slot you would like to use.
17. Click **OK** to schedule the activity at that time. Skip to step 20.
18. To select a time, double click anywhere in the column of the desired time slot.

    You will be returned to the Find an Available Activity Time

Slot dialog box.

19. Click **OK** to accept the selected time.

    You will return to the Group Activity dialog box. The new activity time will appear in the `Schedule Activity on:` display beneath the `Original Activity on:` display.

20. Click **OK** to save the user and resource(s) selected and return to the Activity dialog box.

**or** Click **Cancel** to return to the Group Activity dialog box without reserving any users and/or resources and without changing the date, time, and/or duration.

21. Click **Save** to save this activity.

    If you attempt to schedule an activity at a time when any of your resources and/or users are not available, you will receive an Activity Conflict dialog box.

22. If you would like a printed list of the users with a conflicting schedule, mark the `Print` check box.

    If you will be scheduling the activity regardless of conflicts, you can have TeleMagic send an e-mail to the users with a scheduling conflict to alert them to the fact that an activity has been scheduled at the same time as an existing activity. This will allow them to adjust their schedules as necessary.

23. If you will be scheduling this activity at the current time regardless of the conflict, and would like an e-mail message sent to users with a conflict, mark the `Email` check box. When the activity is scheduled, an e-mail message with the type `Schedule Conflicts` will be sent to the users giving the date and time of the conflicting activity.

24. If you would like to schedule the activity regardless of any conflict, click **Schedule**. You will be returned to the Activity Manager with your activity scheduled.

**or** If you would like to resolve the conflict before scheduling, click **Resolve Conflict**.

    You will be taken to the Group Activity dialog box where you can adjust any conflicts. (You can either remove the user with the conflict from the group, or use the availability checking to locate a time for the activity without conflicts.)

25. When satisfied with your selections, click **OK** to close the Group Activity dialog box and return to the Activity dialog box.

26. Click **Save**.

The activity will be saved to your calendar. All other users to whom the activity is assigned will be given the opportunity to accept or reject the activity assignment. A pop-up notification will appear for each user, notifying them that an activity has been assigned to them. (See the section Acknowledging, Accepting, and Rejecting Assignments for more information.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_To_Edit_a_Group_Activity)<<1} To Edit a Group Activity:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Using Resources

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

If you have not already established a list of available resources, see Resource Management.

## To Assign Resources to an Activity:

1. Follow steps 1 through 15 under Scheduling Activities (Phone Calls, Appointments, and Meetings).

2. Click **Resources**.

   The Resources page will open.

3. Click on the plus sign next to **All Resources**.

   A tree view of the available resources will open.

4. Mark the checkbox associated with each resource to be allocated to the activity.

**or** Mark the **All Resources** checkbox to assign all of the resources.

5. When you are satisfied with your selections, click **OK** or open another page to further define the activity.

6. If you do not want to check availability, (If you did not receive a conflict warning when you were selecting the resources, there is no need to check availability.) skip to step 12

**or** If you want to search for available times, click **Availability**.

   The Availability page will open.

7. Enter the range during which the activity can be scheduled in the `Between Times:` and `Between Dates:` fields.

8. If necessary, edit the time in the `Duration` field on the Activity page. TeleMagic will search for blocks of free time large enough to accommodate the specified duration. (i.e., If your duration is 1 hour, TeleMagic will locate any times on your schedule when you have an entire hour free.)

9. From the drop-down list, select the combination of users and resources to be included in the list.

10. Mark the `View only available time slots` checkbox to restrict the list to open slots.

11. Click **Search**.

    The search will commence. (Depending on your search criteria, this may take a few seconds to a few minutes.)

The window will show the times in which all selected resources and/or users are available.

11. Highlight the time slot you would like to use.

12. Click **OK** to schedule the activity. If there are any conflicts a message box will open and give you the option of scheduling the activity despite the conflict or returning to the Availability page to resolve the conflict.

**or** Open another page to continue refining the activity.

**or** Click **Cancel** to close the Activity dialog box without scheduling an activity.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

# Resource Allocation Conflicts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

If you attempt assign a resource to an activity scheduled for a time when the resource is already assigned to another activity ,the Activity Scheduling Conflict - Resources dialog box will open when you try to save the activity. This dialog box will display the resources that are not available at the time you are scheduling the activity. If you would like to reserve the resource(s) despite the conflict, click **Schedule**. Otherwise, click **Resolve Conflict** to return to the Activity dialog box Resources page. If you select **Schedule**, a conflict may result if you do not take positive action to prevent it.

Resolving resource allocation conflicts may be accomplished in a number of ways. TeleMagic provides you with the ability to reassign the resource or reschedule the conflicting activity. In cases where resolution is not so easily achieved, it may be helpful to print the resource allocations and examine them in detail. (See To Print the List of Resources: for information on printing a list of any activities that have the resource reserved.)

## Scheduling an Extended Activity (Multi-Day Event)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ï¿½ )<<1}

Many activities do not take place on a single day or at specific hours. They occur over periods of time, and even affect different users at different times. For example, an annual audit might stretch over several days, with different people participating on each day. While individual appointments related to the audit can be appropriately scheduled, you might want everyone in the company to be aware of the audit period.

Trips, conferences, seminars, vacations, and other multi-day events can be scheduled in the Activity Manager Month at a Time view. Once scheduled, they will also appear at the bottom of day and week views.

### To Schedule a Multi-Day Event (Extended Activity):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Changing_the_Configuration_of_the_Activity_Manager)<<1}

1. Open the Activity Manager with a Month view in one (or more) of the sections. (To see how to configure your calendar, click on the button to the left.)

2. Click on the start date of the activity, and drag to the end date.

   When you release the mouse button, an Extended Activity dialog box will open. Skip to step 5.

3. Click **Add**.

The Add Activity dialog box will open.

4. Select the `Extended Activity` radio button and click **OK**.

   The Extended Activity dialog box will open.

5. Type the `Description:` as you want it to appear on your calendar.

   **Example:** Annual Audit.

6. If necessary, adjust the activity `Start Date:` and/or `Duration:`.

7. Use the radio buttons to mark the activity as `Personal` (appears only on your own calendar) or `Global` (appears on all user calendars).

8. Add any comments in the `Comments` field.

9. If you are creating a Personal extended activity, you may assign it to another user by choosing that user in the `Assigned to:` drop-down list. (You will only be able to assign activities to users who have granted you scheduling rights to their calendars.)

10. Type any desired note to yourself in the `Comments` box. Click **Stamp** to precede the entry with a date, time, and User ID stamp.

11. When you have finished adding the extended activity, click **Save**.

    The dialog box will close. If you did not assign this activity to another user, it will appear as a colored bar on your Month at a Time calendar page.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

## Note for Step 5

If a user has reserved this resource with an activity, you will receive a message stating that the resource cannot be deleted and giving you the name of the user who has reserved it. This resource must be removed from the user's activity before it can be deleted.

## Hint for Step 5

Think about whether or not this holiday is a working day when deciding if you would like to receive a warning. If you will not be working on the holiday, you will probably want to be warned if you attempt to schedule on that date. If you will be working on that day, it will probably not matter if you schedule items. This will also affect whether activities automatically generated by TeleMagic are scheduled on this date. If you are setting a recurring activity and you select not to schedule on holidays, only holidays for which you have selected `Warn when scheduling on a holiday` will be taken into account.

## Note for Step 7

It is a good idea to periodically remove holidays that have already passed from the list.

## Note for Step 2

It is possible to attach a list box to this and most other fields on this dialog box. See Adding Data Using List Boxes for information on creating and selecting from list boxes.

## Hint for Step 13

If you have linked the To-Do to a contact in step 8, click `Paste Contact Info` to place the linked contact's name, address, main phone, and fax number in the `Comments` field.

## Note for Step 4

It is possible to attach a list box to this and most other fields on this dialog box. See Adding Data Using List Boxes for information on creating and selecting from list boxes.

## Note for Step 6

If your Display preferences are set to the 12-hour clock, and you type an hour from 0 to 12 without indicating a.m. or p.m., TeleMagic will presume that you mean the *current* 12 hours (i.e., if it is now p.m., TeleMagic will make your time p.m.) However, if you type an hour from 13 to 23, TeleMagic will convert the hour to the corresponding 12-hour clock time, followed by “p” (for p.m.).

## Note for Step 8

The activity type `Letter` is reserved for activities created during a TeleMagic merge using the word processing feature. Activities with the type `Letter` are only available through Activity Browse; they do not appear on the calendar. You should avoid giving your activities the type `Letter` (or a type starting with `Letter`) if you wish to see them on the calendar and be able to edit them later.

## Note for Step 15

If you are using Data Synchronization Server, you may see users on this list who do not exist at the current installation of TeleMagic. If this activity is also linked to a contact, the activity will only be synchronized if the contact's record is also synchronized. If the user does not exist at the current site, and the database is not being synchronized, you will need to change either the assignment or the link before you can save the activity. If the database is being synchronized to any site, you will be able to save the activity, but it will only be synchronized to the user if he or she exists at a site that is receiving this record. Before assigning activities associated with records to users at other sites, make sure the user is working that record. You should also be sure that the other user's site is configured to receive activities during synchronization. Ask your system administrator for details.

## Note for Step 16

If the user to whom the activity is assigned is not set up to receive wireless messages, the `Page` check box will be dimmed.

## Hint for Step 17

Whenever a user logs into TeleMagic, he or she will receive a dialog box listing all new activity assignments. The Notify option is useful for users who already are logged into TeleMagic when the activity is assigned. With this option selected, the user will not have to wait until he or she next logs in to learn about the assignment.

## Hint for Step 18

If you have linked the activity to a contact in step 11, click **Paste Contact Info** to place the contact's name, address, main phone, and fax number in the `Comments` field. (Be aware that if you later change the activity link, this information will need to be manually edited in the `Comments` field.)

## Hint for Step 19

When an activity is linked to a contact, contact information is available using the **Contact Info** button only if the contact is in the current database. If you frequently link activities to contacts in multiple databases, consider pasting the contact information into the `Comments` field so it will be available regardless of which database you are in.

## Note for Step 20

You will only be able to use the group activity and resources features if this is not a recurring activity.

## Note for Step 22

If you will be creating a group activity that uses resources, you can perform both functions when setting up the group.

## Note for Step 3

If you select a database other than the one currently open, there will be a pause as TeleMagic closes the current database and opens the selected one.

## Note for Step 6

The `Link to:` display will show the record descriptor for the closest match.

## Note for Step 3

If the contact is in another database, you will be informed of the fact that there will be a slight pause as TeleMagic retrieves the data and given the opportunity of proceeding or not. Click **Yes** to continue or **No** to abort. If you select **Yes**, TeleMagic will open the database and retrieve the information. When you have finished viewing the linked contact information, you will be returned to your current database.

## Hint for Step 4

When this window is open, **Text** is added to the main menu.   Options on this menu let you select the font and spacing of the text in this window.

## Note for Step 20

This will only apply to activities falling on a holiday if you have selected the `Warn when scheduling on this holiday` radio button in the Holiday Record dialog box for this holiday. See Holiday Maintenance for more on the options available when setting up holidays.

## Note for Step 24

If you have scheduled the activity on a time when users are not available and you do not search for availability, when you save the activity you will be informed of any scheduling conflicts. You can search for availability at that time, if desired.

## Note for Step 26

By default, `Start Time:` will display 8:00 a.m. unless the activity is being scheduled on the current day. In this case, the time will default to the current hour.

## Note for Step 27

If you change the amount of time in the `Activity Duration:` field, the `Duration:` field in the Activity dialog box will also change.

## Hint for Step 27

Smaller durations can dramatically increase the time it takes to generate the list of available times. Consider setting a higher duration for the purpose of searching, then set the duration back once the time slot is selected.

## Hint for Step 28

If the activity can be scheduled at any time during your selected time and date range, you can use the first available time slot. In this case set the `Number of Slots:` to 1. If you would like to be able to choose from a selection of available times, set a higher number. Be aware that the more available slots that must be generated, the longer the search will take.

## Note for Step 29

If you are also using resources, the list will show only those times that both the users and resources are available.

## Note for Step 29

If you receive a message that there are no time slots found, there are no times at which all of your selected users and resources are available within your selected search criteria. You can either broaden the search, or use browse to determine which users/resources are not available. (See step 31 for information on browse.)

## Note for Step 34

If you have selected a date, time and/or duration different from that selected when originally setting up the activity, these fields will be updated on the Activity dialog box.

## Note for Step 35

If you have scheduled at a time when both users and resources are not available, you will be notified of the resources first.   If you select to ignore the conflict with the resources, a separate dialog box will appear detailing the users not available.

## Note for Step 17

This list will include all resources, whether or not they are available at the currently selected time for the activity.

## Note for Step 18

If any of the resources you are attempting to reserve for this activity are already assigned, you will receive a message at this time. For more information, see Resource Allocation Conflicts.

## Note for Step 20

If you will also be assigning this activity to a group of users, this search will validate both the resources and the users. Consider setting up the users prior to performing the search. (See the topic Group Activities for more information.)

## Note for Step 21

By default, `Start Time:` will display 8:00 a.m. unless you are scheduling for the current day; in this instance it will default to the current hour.

## Note for Step 22

If you change the amount of time in the `Activity Duration:` field, the `Duration:` field in the Activity dialog box will also change.

## Hint for Step 22

Smaller durations can dramatically increase the time it takes to generate the list of available times. Consider setting a higher duration for the purpose of searching, then set the duration back once the time slot is selected.

## Hint for Step 23

If the activity can be scheduled at any time during your selected time and date range, you can use the first available time slot. In this case set the `Number of Slots:` to 1. If you would like to be able to choose from a selection of available times, set a higher number. Be aware that the more available slots that must be generated, the longer the search will take.

## Note for Step 24

If you receive a message that there are no time slots found, there are no times at which all of your selected resources are available within your selected search criteria. You can either broaden the search, or use browse to determine which resources are not available.

## Note for Step 28

If you have selected a date, time, and/or duration different from that selected when originally setting up the activity, these fields will be updated on the Activity dialog box.

## Note for Step 29

You may receive a message informing you of a conflicting assignment at this point. For more information, see Resource Allocation Conflicts.

## Hint for Step 2

There are spaces allotted on the Month at a Time calendar for up to three extended activities to be displayed on any one day. You will only be able to drag on days that do not already have three extended activities listed. If you wish to schedule on a day with three extended activities, use the `Detail` check box, as described below.

## Note for Step 9

This list will be unavailable if you are creating a global activity.

## Note for Step 9

When an extended activity is assigned to you, you are not notified about the assignment, and you are not given the opportunity of accepting or rejecting it. It will simply appear on your Month at a Time calendar. If the user needs to be notified of the activity, consider sending him or her an e-mail or wireless message. To send an e-mail, see Composing and Sending a Message to send a wireless message, see Sending Wireless Messages.

## Note for Step 11

If more than three extended activities are scheduled on any users' calendars, the new activity will replace one of the existing activities on the display. To view all extended activities on any given day, highlight the day and mark the `Detail` check box in Month at a Time view. The extended activities will be listed in the detail display.

# Viewing Activities & To-Dos

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CALENDX_Hint_on_Viewing_Activities_and_To_Dos)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½
ï¿½ ï¿½ )<<1}

The first thing you will probably want to do each day is check your calendar for appointments, meetings, phone calls, and things to do. You can configure your calendar to display any combination of day, week, and month views. You can also display To-Do and More Info views. Your Calendar can display up to four views at once.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_the_Calendar_Views)<<1}Working with Calendar Views .
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager_Full_Browse_Mode)<<1} Activity Manager Browse Mode
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_and_Editing_Existing_Activities_and_To_Dos)<<1} Viewing and Editing Existing Activities and To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Activity Icons

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Icons on the calendar show scheduled activity types at-a-glance:

- The happy face ( ) indicates a meeting.
- The telephone ( ) indicates a scheduled phone call.
- A clock face ( ) indicates any other type of appointment.
- A bell ( ) indicates an alarm.

# Working with the Calendar Views

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

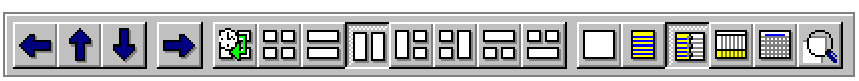
Icons next to the activities on the calendar show scheduled activity types at-a-glance:

- The happy face ( ) indicates a meeting.
- The telephone ( ) indicates a scheduled phone call.
- A clock face ( ) indicates any other type of appointment.
- A bell ( ) indicates an alarm.
- A plus sign (+) marks multiple items in the same time slot (only applicable in the Day at a Time and Week at a Time views).
- A colored bar ( Chicago Trip ) indicates an extended activity like a trip or a conference.

Check boxes (☐) at the left of each entry show whether or not a task is completed. An empty check box indicates a pending activity or To-Do. A marked check box (☑) indicates the activity or To-Do is completed.

There are two toolbars associated with the Activity Manager:


**The Activity Toolbar**



**The Calendar Toolbar**

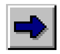
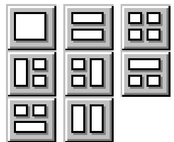
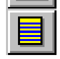
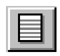
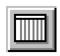
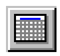
The Activity Toolbar is used for adding, editing, and generally managing your activities. It opens along with the Activity Manager. This toolbar is dockable and will open in the toolbar dock near the top of the screen. You can move this toolbar elsewhere on the screen as required. It contains the following controls:

| | | |
|---|---|---|
| Add an Activity | • | This button will open the Activity or Todo dialog box, depending on which view is selected. |

| | | |
|---|---|---|
| Edit the Current Activity | • | Opens the selected activity or Todo for editing. |
| Delete the Current Activity | | Deletes the selected activity or Todo. |
| Go to Date | | This button opens the Go To Date dialog box. (See To Go to a Specific Date: for details on using this dialog box.) |
| Go to Time | | This button opens the Select Time dialog box. (See To Go to a Specific Time for help with using this dialog box.) |
| To Contact | | This button takes you to the contact linked to the selected activity. |
| Browse | | This button opens a browse list of your To-Dos and activities. (See the Activity Manager Browse Mode topic for details.) |
| Undo | | Removes your last action. |
| View Calendar | Jennifer Cram | Opens the calendar of any other user who has given you permission to view or access their calendar . |
| Toggle | | Opens or closes the Calendar Toolbar. |

The Calendar Toolbar is used to configure your Activity Manager, and to navigate quickly through your calendar. This toolbar is dockable and opens near the bottom of the screen. It can be moved as required. It provides the following controls:

| | | |
|---|---|---|
| Close Activity Manager | | Closes the Activity Manager. You can also close the Activity Manager by clicking on the Close Window button in the upper-left hand corner of the Activity Manager screen. |
| Previous Day | | Moves the selected view back one day. |
| Previous Item | | Moves the highlight in the selected view up the view one space. For example, if you have the Todo view selected, this button will move the highlight up the page one spot to the previous Todo. If you have a Day or Week view selected, this button will move the highlight up the page one space. (By default this is one hour, but this can be changed.) In Month view, this button will move the highlight up the page one space, which is equivalent to one week. |
| Next Item | | Works like the Previous Item button, above, but moves the highlight down the view. |

| | | |
|---|---|---|
| Next Day |  | Works like the Previous Day button, above, but advances to the next day. |
| Synchronize Views |  | Brings all views to the same time as the selected view. While this button is depressed, all views will change as you navigate through any view so that they all display the same day. |
| Configuration Buttons |  | These buttons arrange the Activity Manager to the configuration indicated by the graphic on each button. |
| Todo View |  | Changes the selected view to a Todo view. |
| Day View |  | Changes the selected view to a Day view. |
| Week View |  | Changes the selected view to a Week view. |
| Month View |  | Changes the selected view to a Month view. |
| Detail View |  | Changes the selected view to a Detail view. Use the Detail view to see more information about the selected activity. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working with Existing Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CALEND2_Re_Prioritizing_Completing_and_Deleting_To_Dos)<<1} Re-Prioritizing, Completing, and Deleting To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_and_Editing_Existing_Activities_and_To_Dos)<<1} Viewing and Editing Existing Activities and To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# To View Additional Activity Related Information:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. To view activity comments and information on the linked record (if applicable) in Day or Week views, select the activity and click on the Edit the current activity button:

   ●

**or** Double-click on the activity.

The Activity dialog box will open.

2. To view information about the linked contact, click the **Link** tab.

   The Link page will open. Information related to the linked contact is displayed on the left side of the page. You can edit the link from this page.

3. To view activity comments, click on the **Comments** tab.

   The Comments page will open.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_and_Editing_Existing_Activities_and_To_Dos)<<1} Viewing and Editing Existing Activities and To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Going to a Specific Date or Time

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Navigating through the calendar is accomplished by going to a specific date in any view, or a specific time in Day or Week views.

To Go to a Specific Date:
To Go to a Specific Time (Method 1):
To Go to a Specific Time (Method 2):

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_the_Calendar_Views)<<1}Working with the Calendar Views
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# To Go to a Specific Date:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. Click the **To Date** button.

   The Go To Date dialog box will appear.

2. Click on scroll arrows at the top of the dialog box to flip the Go To Date calendar pages by year (upper set) or month (lower set).

3. Click on a specific date to select that date.

   A box will appear around the date you have selected. The display on the date button at the bottom of the dialog box will change accordingly.

4. Click the date button to bring up the calendar page for that date.

**or**
- Click **Today** to bring up the daily schedule for today's date.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Going_to_a_Specific_Date_or_Time)<<1} Going to a Specific Date or Time

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Going to a Specific Time (Method 1)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

## To Go to a Specific Time:

1. With the Activity Manager open, click on a Day or Week view. The edge of the selected section will be highlighted.
2. Click on the Go To Time button:

   The Select Time dialog box will appear.
3. Click **Now** to go the current system time.

**or** Use the `AM` and `PM` radio buttons to toggle between morning and afternoon.

3. Click on the `Hours` scroll arrows to adjust the hour of the time displayed. To scroll quickly through the hours, hold down the scroll arrow.
4. Click on the `Minutes` scroll arrows to adjust the minutes of the time displayed. To scroll quickly through the minutes, hold down the scroll arrow.
5. Click on the `Duration` scroll arrows to change the time setting by the interval set in the `Default activity duration` setting in Activity Preferences. (See Default Activity Duration for details.)
6. Click **Select** to go to the time displayed in the window.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_To_Go_to_a_Specific_Time_Method_2)<<1} To Go to a Specific Time (Method 2):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Going_to_a_Specific_Date_or_Time)<<1} Going to a Specific Date or Time

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# To Go to a Specific Time (Method 2):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. At the Day at a Time or Week at a Time views, right-click anywhere on the view and select Go To Time from the pop-up menu.
2. Use arrow keys to select the time.
3. Click **Select** to return to the calendar at that time.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_To_Go_to_a_Specific_Time_Method_1)<<1} To Go to a Specific Time (Method 1):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Going_to_a_Specific_Date_or_Time)<<1} Going to a Specific Date or Time

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Activity Manager Browse Mode

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

The Activity Manager's activity browse mode allows you to see, in tabular format, a list of all your activities and To-Dos, both pending and completed.

## To Browse Through a List of To-Dos and Activities:

1. If you are in the Contact Manager, select **Browse** from the **Activity** menu.

**or** If you are in the Activity Manager, click the Activity Manager's **Browse** button.

An Activity Browse window will open, showing all To-Dos and activities in order by date.

2. Use the following guidelines to view your activities:
   - To see fields and data that currently are not showing in the window, use the scroll bars.
   - To maximize the browse window, double-click the title bar.
   - To move a field, click on the field and drag it to its new position.
   - To split the window in two, move your cursor to the lower left hand corner of the window, until it turns into a two-headed arrow, click and drag the cursor to the right until the split indicator is the desired width, then drop the split bar.

3. When you have finished viewing your activities, double-click the browse window's control box. The browse window will close. You will be returned to the calendar day from which you accessed the browse window if you were working in the Activity Manager, or to the contact record from which you accessed the browse window if you were in the Contact Manager.

**or** If you would like to go to the calendar day containing the currently highlighted activity, double-click the activity or highlight it and press ENTER. The day will open in the calendar view from which you accessed the browse window, or to the Day at a Time view if you accessed browse from the Contact Manager.

**or** If you would like to edit an activity, highlight the desired activity and press the SPACEBAR or double-click. The Activity or To-Do dialog box will open where you can edit the item. When you have finished, you will be returned to the browse window.

**Continue...**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_Activities_To_Dos)<<1} Viewing Activities & To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Viewing and Editing Existing Activities and To-Dos

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

## To See Full Details of a To-Do or Activity

1. In either day or week view, double-click the To-Do or Scheduled Activity, or highlight the item and click **Edit**.

2. Click **Edit**.

   The related To-Do or Activity dialog box will open.

3. For a description of each field in this dialog box, see topics Adding To-Dos or Scheduling Activities (Phone Calls, Appointments, or Meetings).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working with Existing Activities
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Re_Prioritizing_Completing_and_Deleting_To_Dos)<<1} Re-Prioritizing, Completing, and Deleting To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_Activities_To_Dos)<<1} Viewing Activities & To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Editing a Group Activity:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

## To Edit a Group Activity

1. If you are the user who originally created the group activity, double-click on it. You may edit the activity as usual.

2. Click **Save** to save the changes. Any changes you make will be updated to the activity appearing on the calendars of all users to whom the activity is assigned.

   A message will appear asking if you would like to notify the users in the group of the change to the activity.

3. Click **Yes** to cause each user in the group to receive a pop-up notification of the change to the group activity. Click **No** if you do not want the users to receive a notification of the change. They will see the change to the activity the next time they access it.

**or**

1. If the group activity has been assigned to you by another user, double-click on it.

   The Group Activity dialog box will open.

   This screen will display the details of the group activity. The `View Existing Comments` field allows you to scroll through comments that have been entered by the user who created the activity, as well as any other members of the group.

2. To add a note to the comments field, click **Stamp**.

3. After the stamp in the `Add a New Comment` field, enter the comment that you would like to have appear in the `Comments` field of the group activity.

4. If you would like to view the list of users in the group, or the resources being used for the activity, click **Groups/Resources**.

   A Group Activity dialog box displaying the group and any resources will appear.

5. When you have finished viewing the group and resource information, click **OK**.

6. Click **OK** to exit the Group Activity dialog box.

   If you have added a comment, it will appear with the activity on the calendars of all users to whom the group activity has been assigned.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Group_Activities)<<1} Group Activities
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_Activities_To_Dos)<<1} Viewing Activities & To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

# Re-Prioritizing, Completing, and Deleting To-Dos

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Often, you need to reorder a To-Do list, or change the priority of a To-Do:

To Re-order and Re-prioritize a To-Do:
To Mark a To-Do as Completed
To Delete a To-Do:
Converting To-Dos to Activities

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working with Existing Activities
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_Activities_To_Dos)<<1} Viewing Activities & To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

## To Re-order and Re-prioritize a To-Do:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. Select the item to move.
2. Click and drag the item to its new position.

   The cursor will change to a black-and-white position

   selector box: . The new position will be highlighted.
3. Drop the item.

   The list will be re-ordered.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Re_Prioritizing_Completing_and_Deleting_To_Dos)<<
1}

## To Delete a To-Do:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

- 1. Highlight the To-Do you want to delete.
  2. On the toolbar, click the Delete the current activity tool:
     - .

  **or** Press the DELETE key on the keyboard.

  **or** Right-click on the To-Do and select **Delete the current To-Do…** from the menu.

  A message will appear confirming that you want to delete the To-Do.

- 3. Click **Yes** to delete the To-Do.

  **or** Click **No** to retain the To-Do.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Re_Prioritizing_Completing_and_Deleting_To_Dos)<<
1}

# To Mark a To-Do as Completed

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

- Click once in the check box beside the To-Do. The check box will display a check mark: • .

**or**

1. Open up the To-Do dialog box by double-clicking the To-Do or highlighting it and clicking **Edit**.

   The To-Do dialog box will open.

2. Mark the `Completed` check box. Today's date will appear in the `Date:` field below the `Completed` check box. To change the date shown, type in a new date or click the Date Picker icon and choose a date from the Go To Date dialog box.

3. Click **Save** to return to the To-Do list. Note that there is now a check mark in the check box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Re_Prioritizing_Completing_and_Deleting_To_Dos)<< 1}

## Converting To-Dos to Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Often, you have projects that you know you must do, or meetings that you know you must attend, but you have not yet scheduled them for any particular time. You can enter them initially as To-Dos. Later, when you have fixed times, you can drag the To-Dos to specific appointment slots.

If you need to move the To-Do to a different date, after you have moved it to the appointed time, double-click it or highlight it and click **Edit**. The Activity dialog box will open. Adjust the date or other details as necessary, then save the new settings.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Re_Prioritizing_Completing_and_Deleting_To_Dos)<<1}

# Working With Existing Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic's Activity Manager makes it easy to work with existing items on your calendar page.



### Continue…


{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Re_Prioritizing_Completing_and_Deleting_To_Dos)<<1} Re-Prioritizing, Completing, and Deleting To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_Activities_To_Dos)<<1} Viewing Activities & To-Dos
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Activity_Manager)<<1} Activity Manager Contents

## To change any activity to a To-Do:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

- Drag the activity to the To-Do section of the calendar.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Working_with_Existing_Activities)<<1}

# To Reschedule an Activity:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

- Reschedule any activity by dragging it to a new time slot.

If you drag an activity to a time slot containing another activity and there is a scheduling conflict due to personnel or resources being assigned to both activities, the Activity Scheduling Conflict dialog box will appear. To reschedule the activity despite the conflict, click **Schedule**.

A plus mark (+) indicates when there is more than one activity scheduled at the same time. If you attempt to drag an activity with a plus mark, when you release the mouse button, a Which Activity dialog box will appear. Highlight the activity you would like to reschedule and click **Select**.

**or**

1. Open up the Activity dialog box by double-clicking the activity or highlighting it and clicking **Edit**.
2. In the `Date:` and `Time:` fields, type the new schedule details.
3. Click **OK** to return to the calendar.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Working_with_Existing_Activities)<<1}

# To Mark an Activity as Completed:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Click once in the check box beside the activity. The check box will display a check mark: .

**or**

1. Highlight the activity you want to complete.
2. On the toolbar, click the Edit the current activity tool: .

**or** Right-click on the activity and select **Edit the current activity…** from the menu.

**or** Double-click on the activity.

The Activity dialog box will open.

3. Mark the `Complete` check box.

The `Time:` and `Date:` fields directly below the check box will fill in with the current date and time.

4. Adjust the completion date and time, if necessary.
5. Click **OK** to return to the calendar. Note that there is now a check mark in the check box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Working_with_Existing_Activities)<<1}

## To Delete an Activity:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. Highlight the activity you want to delete.
2. On the toolbar, click the Delete the current activity tool:
   ● .

**or** Press the DELETE key on the keyboard.

**or** Right-click on the activity and select **Delete the current activity…** from the menu.

If there is more than one activity in the time slot, the Which Activity? dialog box will appear. Select the activity you want to delete, then click the **Select** button.

A message will appear confirming that you want to delete the activity.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<HINTUP01.BMP|CAT.BMP<JumpId(TM.hlp>hintsï¿½CALENDX_Hint_for_Deleting_Activities_To_Dos)<<1}

3. Click **Yes** to delete the activity.

**or** Click **No** to retain the activity.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_To_Delete_a_Recurring_Activity)<<1} To Delete a Recurring Activity:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Archiving_Activities)<<1} Archiving Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working With Existing Activities

## Deleting a Recurring Activity:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

### To Delete a Recurring Activity:

1. Highlight the recurring activity you want to delete.
2. On the toolbar, click the Delete the current activity tool: ● .

**or** Press the DELETE key on the keyboard.

**or** Right-click on the recurring activity and select **Delete the current activity…** from the menu.

If there is more than one activity in the time slot, the Which Activity? dialog box will appear. Select the recurring activity you want to delete, then click the **Select** button.

The Delete Recurring Activities dialog box will open.

3. Choose the appropriate option.
4. Click **Delete** to delete the selected activity.

**or** Click **Cancel** to retain the activity.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_To_Delete_an_Activity)<<1} To Delete an Activity:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Archiving_Activities)<<1} Archiving Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working With Existing Activities

# Archiving Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

While deleting one activity at a time is the best way for most users to deal with obsolete activities on a day-to-day basis, sometimes you will need to delete groups of activities. The Activity Archive feature removes specific activities to a file, which can then be deleted. A supervisor user can use this feature, for example, to delete all completed activities, or to archive all activities assigned to a user who has left the company. Or, you can use this feature to archive a set of your own activities. (While a supervisor user can archive activities for any individual user or all users, non-supervisor users have access only to their own activities.)   Archived activities can be re-imported at a later date if desired.

You cannot archive extended activities (those that span over more than one day). Also, should you ever re-import your archived activities, comments, contact links, and alarms will not be included and any recurring activities will lose their association with each other.

## To Archive a Group of Activities:

1. From the **Activity** menu, select **Archive**.

   The Activity Archive dialog box will open.

2. In the `Date From:` and `Date To:` fields, enter the range of dates between which you want to archive activities.

3. If you are a supervisor user, in the `User:` field, choose the name of the user whose activities you want to archive, or choose `All` if you want to archive activities for all users. (Users must store their activities in the same path as you to be included.)

4. In the `Type:` field, specify whether you want only activities of a certain type to be archived, or whether you want all activity types to be considered. If there is a list box attached to the `Type` field in the Activity dialog box, this list will be populated with the contents of that list box. If there is not, this list will include some common activity types.

5. Use the radio buttons to specify whether you want `Completed` activities, `Incomplete` activities, or both (`All Activities`) to be archived.

6. Under `Archive method` select:

   - `Fast` if you would like to quickly archive activities. You must have exclusive use of the activity database (i.e., no other users may have the Activity Manager open). Be aware that if you select this and another user has the Activity Manager open, you will receive a warning when you attempt to archive and not be allowed to proceed.

- Multi User if you would like to be able to archive activities while other users are in the Activity Manager. Be aware that with this option selected, if a user is editing an activity it will not be archived. (You will be notified of any activities that were skipped after the archive is complete.) It will also take longer than Fast mode.

When the activities are archived, TeleMagic will create three files named TMACTARC.DBF, TMACTCMT.FPT and TMACTCMT.DBF. Use the If activity file already exists radio buttons to tell TeleMagic what to do in the event that files of these names already exist in the target location. (This may occur if you have previously performed an archive to the same location.)

7. Select Append if you would like new archive information added to the data already existing in the file.

**or** Select Overwrite if you would like to replace the existing files with the new data.

When a document or a fax is sent, you have the choice of having an activity created. The Document History feature, available off the Linked Documents dialog box accessed from the View linked documents button () on the Contact Manager toolbar, uses these activities to provide you with a list of documents and faxes that have been sent to a contact. If you are using this feature, you may not want to delete activities with the types Letter and LetterFax. Retaining these activities will allow you to keep an accurate document history. (These activity types do not appear on your calendar. They are only visible in Activity Browse view.)

8. If you do not want to archive activities with the type Letter or LetterFax, leave the Do not archive Document/Fax related activities check box marked.

**or** If you would like to archive activities with the type Letter or LetterFax along with the other activities, unmark the Do not archive Document/Fax related activities check box.

**WARNING!**
If this check box is unmarked, a record of mail merges and faxes will not be included in the Document History lists.

9. If you do not want activities that are linked to contacts archived, mark the Do not archive Contact-related activities check box. Retaining these activities allows you to keep an accurate history of activities associated with any contact.

**or** If you do not need to retain a history of these activities, unmark this check box.

10. Under `Archive to`:, select the path to the location where you would like the archive file created. (This will default to the TeleMagic global directory, the directory where TeleMagic is installed.)

**or** Click **Find** to select the path from a Select Directory dialog box.

11. Click **Archive**.

    A confirmation message will appear.

12. Click **Yes** to continue.

**or** Click **No** to abort.

When the archiving is complete, a message will appear informing you of how many activities and To-Dos were archived.

- The activities which match the stated requirements will have been deleted from the installation, and archived in the files TMACTARC.DBF, TMACTCMT.FPT and TMACTCMT.DBF in the specified directory.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_To_Delete_an_Activity)<<1} To Delete an Activity:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_To_Delete_a_Recurring_Activity)<<1} To Delete a Recurring Activity:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working With Existing Activities

# Activity Rollover

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CALENDX_Note_on_Activity_Rollover)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

The Activity Rollover feature allows you to move groups of incomplete activities forward on your calendar. This is useful, for example, if you will be out of the office for an extended period of time. Instead of missing the activities scheduled during that time, you can roll them forward to the dates when you will be back in the office.

When you perform an Activity Rollover you specify the date range of the activities that you would like to move and how many days forward you would like to move them. The activities will be scheduled at the same time the specified number of days later. (For example, if you roll an activity scheduled on Monday at 3:00 forward 3 days, it will be scheduled on Thursday at 3:00.) If you have activities, such as meetings, that need to be coordinated with other people, consider moving these activities individually before performing the rollover.

## To Roll Over Incomplete Activities:

1. From the **Activity** menu, select **Rollover**.

   The Rollover Incomplete Activities dialog box will open.

2. In the `Start Date` and `End Date` fields, enter the date range for the activities you would like to roll over, or use the Date Picker icons to select the dates from a Go To Date dialog box.

3. Use the `Rollover your activities` field to specify how many days forward you would like to move your activities. Enter the number of days in the field, or use the spinner arrows to select the number. (This will move the activities forward the specified number of days from the original activity date, not the current system date.)

   Unless you have selected to roll your activities over in complete weeks (multiples of 7), activities previously scheduled on a week day may now fall on a weekend or holiday.

4. If you would like any activities falling on a weekend or holiday moved to the next workday, mark the `Move weekend or holiday activities to nearest workday` check box.

   **or** If you would like to schedule activities on the weekends and holidays leave this check box unmarked.

5. Click **Rollover**.

   A message will appear asking you to confirm your decision to roll over the activities.

6. Click **Yes** to proceed.

**or** Click **No** to abort.

The incomplete activities will be rolled over. A message will appear informing you when it is completed.

7. Click **OK**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Working_with_Existing_Activities)<<1}

# Reassign Incomplete Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CALENDX_Note_on_Reassigning_Incomplete_Activities)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Emergencies, vacations, overburdened users, and personnel replacement are just a few examples of times when activities may need to be reassigned to others. TeleMagic's Reassign Incomplete Activities feature allows you to redistribute your workload to others who have granted you full access to their calendars.

The Reassign Incomplete Activities feature allows you to move all of the incomplete activities during a specified date range from one user's schedule to another user's schedule.

## To Reassign Activities:

1. From the **Activity** menu, select **Reassign**.

   The Reassign Incomplete Activities dialog box will open.

2. Use the `From user` list to select the user whose activities you would like to reassign. This list will default to your own name, or you can select from a list of users who have granted you full access to their calendars.

3. From the `To User` drop-down list, select the user to whom you would like to assign the activities.

4. If you would like to reassign all incomplete activities `All` radio button. (This is useful when the user receiving the activities is taking over the former user's position.)

**or** If you would like to limit the activities that are reassigned to those falling within a specified date range, select the `Date Range` radio button. (This is useful for users who will be unavailable for a given time period, such as while on a vacation.)

5. If you selected Date Range in step 4, above, enter the date span in the `From:` and `To:` fields, or use the Date Picker icons to choose the dates from a Go To Date dialog box.

6. When you are satisfied with your choices, click **Reassign**.

   A message will appear asking you to confirm your decision to reassign the activities.

7. Click **Yes** to proceed.

**or** Click **No** to abort.

If you selected **Yes** in step 7, the activities will be reassigned. A message will appear informing you when reassignment is complete.

8. Click **OK**.

9. If you want to reassign any additional activities, repeat steps 2 through 8.

**or** Click **Close** to exit the Reassign Incomplete Activities dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Working_with_Existing_Activities)<<1}

## Note for Step 1

This is the only place in Month at a Time view where To-Dos are accessible. Additionally, if you have more than three extended activities, this is the only place you can access the complete list.

## Note for Step 2

If your Display Preferences are set to use 24 hour time this is not available.

## Note for Step 6

Depending on the settings in the Activity preferences, if the actual time is not one that is shown on the daily schedule, you will be moved to the time slot which is closest.

## Note for Step 1

This menu option will be unavailable from the Activity Manager.

## Note for Step 1

If you have multiple activities scheduled in the same time slot (indicated by a “+” sign to the right of the activity), a pop up menu will open listing all of the activities in that time slot. Click on the activity that you want to view or edit to open the Activity dialog for that activity.

## Note for Step 3

If you have changed the activity time, it is highly recommended that you alert users to this fact.

## Note for Step 1

If you did not create the activity, but receive the standard Activity dialog box instead of the Group Activity dialog box, the user who created the group activity has assigned it to you. Refer to steps 1 through 3. (If you are creating a group activity and select another user in the `Assigned To` field in the Activity dialog box, that user will receive the master copy of the group activity and be responsible for maintaining it. This is useful, for example, if you wish to have a secretary or assistant create the activity, but wish to maintain it yourself.)

## Note for Step 4

This is the same dialog box that is used to add a group or resource to an activity. When editing a group activity created by another user, this dialog box is provided for display only. The editing options will be dimmed.

## Hint for Step 2

To-Dos are grouped by priority. To change the priority of a To-Do, make sure you drag the position selector box into the group of To-Dos with the desired priority.

## Note for Step 3

Once a To-Do is completed, it will only appear on the calendar on the date on which it was completed. Should you wish to change an item's status back to incomplete, locate the To-Do and simply unmark its check box.

## Note for Step 3

You will not be able to retrieve an activity deleted from the Activity dialog box.

## Note for Step 2

If no dates are selected in the `Date From:` and `Date To:` fields, all activities from the users selected will be archived. The archiving process will delete the selected user's activities from the Activity Manager and from any Activity and Contact History fields. If the archived activities are restored, they will not contain any of the associated "Comments".

## Note for Step 3

A supervisor user does not need to have been given access to other users' calendars in order to archive their activities.   If you are not a supervisor user, you will only be able to archive your own activities.

## Hint for Step 6

Other users having the Activity Manager open is only an issue if they are storing their activity file in the same location as you. See Location of Activity Files for more information on activity file locations.

## Hint for Step 6

If no other users are editing any of the activities that are selected to archive, you should not have any problems selecting the Multi-User option. Instruct other users to not edit the calendar of the user selected in step 3, above, during the archive.

## Hint for Step 12

The archived files generated during this procedure can be re-imported at a later date if required.

## Note for Step 4

If you mark this check box, there is a risk that you may overload the nearest workday. For example, if you have recall activities scheduled every 15 minutes that are rolled over to a weekend, with this check box marked, all activities for Saturday, Sunday, and Monday will fall on Monday. If you have a very full schedule, consider leaving this check box unmarked and either separately rolling over the weekend and holiday activities to a free day, or manually moving each activity as necessary.

## Note for Step 6

If there are no incomplete activities scheduled during the specified date range, you will receive a message informing you of this fact.

## Note for Step 7

If there are no incomplete activities scheduled during the specified date range, you will receive a message informing you of this fact.

# Handling Alarms

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic activates a separate alarm program whenever you start the program. This alarm program keeps running until you end your Windows session, even if you close TeleMagic. The alarm program icon shows that TeleMagic Alarms is running and will remind you of your alarms.

**Alarm Icon**

To Set an Alarm:
To Adjust Alarm Snooze Duration:
To See When Your Alarm Will Next Go Off:
To Handle an Alarm That Goes Off While TeleMagic is Closed:
To Handle an Alarm That Goes Off While TeleMagic is Open:
To Handle Multiple Overdue Alarms:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

## To Set an Alarm:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. Add an activity following the instructions under Scheduling Activities (Phone Calls, Appointments, and Meetings)

**or** Double-click an existing activity to edit it.

2. Mark the `Alarm` check box to turn on a visible alarm to remind you of your scheduled activity.

3. Type any desired lead time in minutes (that is, the amount of warning time prior to the scheduled activity) for your alarm in the `Lead Time:` field.

**or** Click the spinner arrows and TeleMagic will enter the lead time for you.

4. Click **Save** to save the activity with the alarm.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1}

## To Adjust Alarm Snooze Duration:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

The snooze duration is how long TeleMagic should wait between scanning for alarms. This will apply to both notification of new alarms and snooze time. (TeleMagic's snooze is similar to the snooze on an alarm clock. If your alarm goes off at a time when it is not convenient to go to the associated activity, TeleMagic will snooze the alarm for the specified time. After the designated time, the alarm will go off again.) You may set your snooze interval to any value you want, or disable alarms entirely.

1. From the **Options** menu, select **Preferences**.

   The Activity Preferences screen will open. (See the Activity Preferences topic for more information on all of the Activity and other preferences available at this screen.)

2. Adjust the number displayed in the `New Alarm/Snooze Interval` field.

   **or** Click the spinner arrows and TeleMagic will enter the time for you.

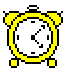
3. Click **OK** to save the changes.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1}

## To See When Your Alarm Will Next Go Off:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

- Click the external alarms icon:



**Alarm Icon**

TeleMagic will display the TeleMagic Alarms Message Box:


**TeleMagic Alarms Message Box**

If you have several activity alarms pending when you click the TeleMagic Alarms icon, you will only be notified of the earliest alarm not yet marked as complete.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1}

# To Handle an Alarm That Goes Off While TeleMagic is Closed:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

If you have closed TeleMagic, when an alarm goes off you will hear a beep and/or see the TeleMagic Alarms pop-up warning box:

- 

**TeleMagic Alarms Pop-up Warning**

- To snooze the alarm, choose **No**. If you choose **No**, TeleMagic will wait for the amount of time specified in your Activity preferences, then notify you again, until you turn off your alarm. (See To Adjust Alarm Snooze Duration: for information on controlling how often the alarm appears.)

**or** To start TeleMagic and view the details of the activity, choose **Yes**.

TeleMagic will open to the Activity Manager. The related activity will be automatically opened where you can view or edit details, or turn off the alarm.

**Warning!**

If a downtime has been established for TeleMagic, and an alarm is scheduled for that period, the alarm will not go off. It is recommended that downtimes be established when any access to TeleMagic is not required.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_To_Handle_an_Alarm_That_Goes_Off_While_TeleMagic_is_Open)<<1} To Handle an Alarm That Goes Off While TeleMagic is Open:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1} Handling Alarms

## To Handle an Alarm That Goes Off While TeleMagic is Open:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

If you already have TeleMagic running when an alarm goes off, an alarm message will appear giving you the opportunity of going to the activity.

- If you want to respond to the alarm immediately, choose **Yes**.

**or** To snooze the alarm, choose **No**. If you choose **No**, TeleMagic will wait for the amount of time specified in your Activity preferences, then notify you again, until you turn off your alarm. (See To Adjust Alarm Snooze Duration: for information on controlling how often the alarm appears.)

If you choose to go to the alarm when you are editing a record in the Contact Manager, a message will appear giving you the option saving your edits. When you return to the Contact Manager after dealing with the activity, you will no longer be in edit mode.

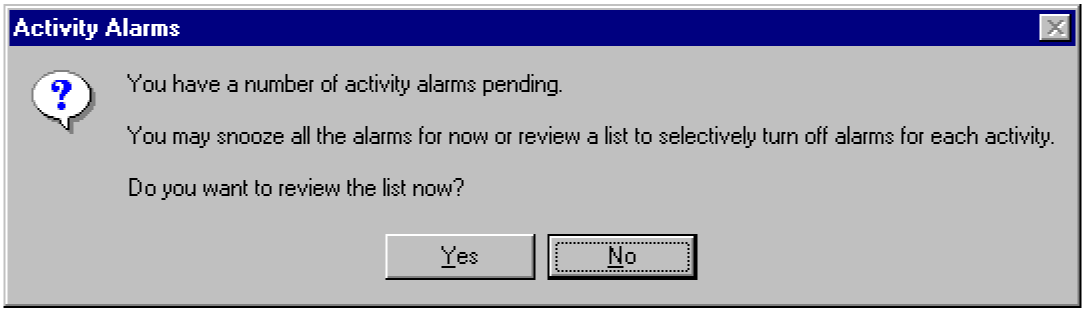
### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1} Handling Alarms

## To Handle Multiple Overdue Alarms:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Manageri¿½ i¿½i¿½ )<<1}

If you have more than one overdue alarm, TeleMagic will display the Multiple Alarms question box:



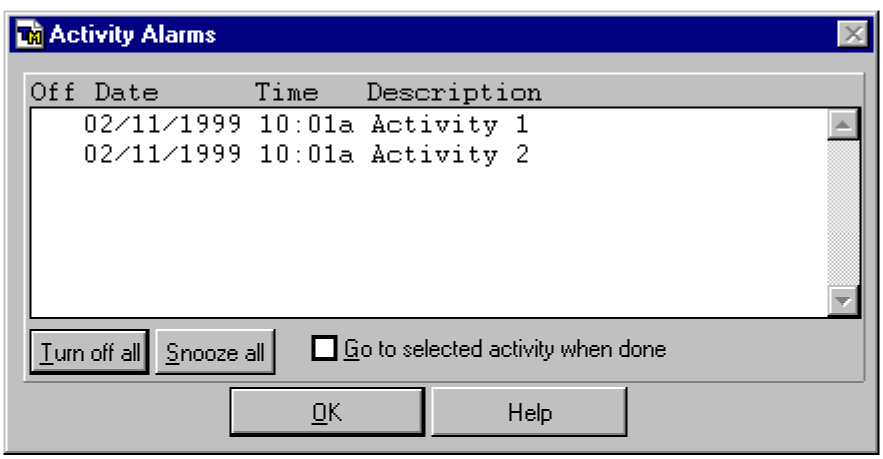

**Multiple Alarms Question Box**

- To snooze all alarms, click **No**. If you choose **No**, TeleMagic will wait for the amount of time specified in your Activity preferences, then notify you again, until you turn off your alarms. (See To Adjust Alarm Snooze Duration: for information on controlling how often the alarm appears.)

**or**

1. To see a list of alarms, click **Yes**.

   An Overdue Alarms dialog box will open:




**Sample Overdue Alarms Dialog Box**

2. Use the following guidelines when working with overdue alarms:

   - To snooze all alarms, choose **Snooze all**. (The alarm notification will reappear after the specified snooze time.)

- To permanently turn off all alarms, choose **Turn off all**. Check marks will appear in the `Off` column of all activities.
- To turn off a single alarm, click on the related activity. A check mark will appear in the `Off` column. (To remove the check mark, double-click the activity.)
- To see details for an activity, highlight it and mark `Go to selected activity when done`.

3. When finished, click **OK**.

   If you marked Go to selected activity when done, you will be taken to the Activity Manager with the related activity open. You may view or edit it as necessary.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Handling_Alarms)<<1}

## Multi-User Calendars

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CALENDX_Note_on_Multi_User_Calendars)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

You may occasionally find it necessary to schedule a task for another user, or you may require that other users schedule activities for you. For example, in dealing with a contact, you may find that a user in another department is best suited to deal with a particular situation and want the follow-up to be performed by that user; or you may have an assistant who frequently sets up appointments for you. TeleMagic allows users to view and schedule on each others' calendars. (These activities can be accepted or rejected by the individual as necessary.)   To preserve the privacy of your calendar, rights to access your activities must be granted to other users. You can control who may access your calendar, and even control the degree of access any individual user has.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Controlling_Others_Access_to_Your_Calendar)<<1} Controlling Others Access to Your Calendar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Acknowledging_Accepting_and_Rejecting_Assignments)<<1} Acknowledging, Accepting, and Rejecting Assignments

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Viewing_and_Scheduling_on_Others_Calendars)<<1} Viewing and Scheduling on Others Calendars

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Assigning_Activities_and_To_Dos)<<1} Assigning Activities and To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Viewing_Assigned_Tasks)<<1} Viewing Assigned Tasks

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Controlling Others' Access to Your Calendar

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic allows you to control the degree of access users have to your schedule. For example, some colleagues trying to set up meetings with you need only know what times you are free. Your supervisors may need to know the details of each of your scheduled activities in order to best utilize your time. Personal assistants and executive secretaries need to make decisions about which appointments are most important and when most logically to schedule others. They need to see all the details, and to be able to add to or change your calendar.

TeleMagic makes it easy to grant and customize access to your calendar to allow for all these possibilities.

## To Control Other Users' Access to Your Calendar:

1. Be sure that you have logged in with your own user ID. (If you are the current user, your name will appear at the top of your calendar. If you are not the current user, select **Change User** from the **File** menu.)

2. From the **Activity** menu, select **User Permissions**.

   The Activity Access dialog box will open.

   The `Users Without Access` list shows all users in TeleMagic who do not currently have access to your schedule. (If you are using Data Synchronization Server, users at synchronized sites will also appear on this list. They will not necessarily exist in the current installation of TeleMagic.) The `Users With Access` list will include any users to whom you have previously granted rights to your calendar.

3. Click **Set Default** to create general defaults for the activity permissions.

   The Default Access Permissions dialog box will open.

   These defaults will establish the permissions granted to all users to whom you give access to your calendar, unless otherwise specified.

4. Use the `Access Permissions:` radio buttons to control the degree of access:

   - Select `View Time Blocks Only` if you would like to grant users rights to view your calendar. With this option selected, when the user opens your calendar, in place of activity descriptions he or she will see `[n/a]`. This option is useful if you want the user to be able to view your availability without being able to see the activity and To-Do descriptions, browse your schedule, or use the `More Info` check box.
   - Select `View Full Details` if you would like

to grant users rights to view full details of your calendar. With this option selected, the user will be able to open your calendar and see activity descriptions and use the `More Info` feature.

- Select `Full Access (View, Schedule, Edit)` if you would like to grant the user rights to both view and change your schedule. He or she will be able to assign you new activities, and edit existing ones.

5. Click **Set Default**.

   You will be returned to the Activity Access dialog box.

6. Highlight the user to whom you would like to grant access in the `Users Without Access` list and click **Add**. The user will move to the `Users With Access` list.

   Users in the `Users With Access` list will be granted the default permissions.

7. If you would like to change the access of any of the users on the `Users With Access` list, highlight the user.

   His or her name will appear in the `Set Activity Permissions for:` field.

8. If you do not want to use the default permissions for this user, adjust the user's permissions following the guidelines in step 4 above.

9. Repeat steps 7 and 8 for each user whose permissions you would like to set.

10. Click **OK** to close this dialog box and return to the Activity Manager.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_To_Deny_an_Individual_Access_to_Your_Calendar)<<1} To Deny an Individual Access to Your Calendar:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Multi_User_Calendars)<<1} Multi-User Calendars

## To Deny an Individual Access to Your Calendar:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Activity** menu, select **User Permissions**.

   The Activity Access dialog box will open.

2. From the `Users With Access` list, select the individual's name, then choose **Remove**.

   TeleMagic will move the name to the `Users Without Access` list.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Controlling_Others_Access_to_Your_Calendar)<<1} Controlling Others Access to Your Calendar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Multi_User_Calendars)<<1} Multi-User Calendars

## Viewing and Scheduling on Others’ Calendars

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

### To View the Calendar of Another User:

1. From the **Activity** menu, select **View User Schedule**.

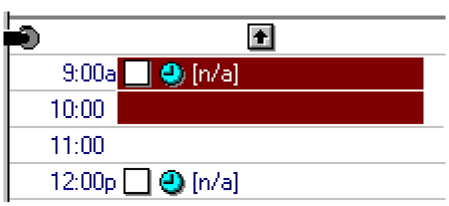
   A menu will appear with a list of users who have granted you access to their calendars.

2. Highlight the user whose calendar you would like to view.

   The Activity Manager will switch to the select user’s calendar. The title bar will indicate whose schedule you are currently viewing. If you have rights to schedule on the user’s calendar, you can add or edit activities following the guidelines earlier in this chapter.

3. When you are finished with the user’s schedule, select **View User Schedule** from the **Activity** menu to select another user. (Select your own name to return to your calendar.)

If you have rights to view another user’s calendar, but not to see details, you will only see time blocks showing when that user is busy:




**Day at a Time View, with Time Block-Only Display**

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Multi_User_Calendars)<<1} Multi-User Calendars

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_the_Calendar_Views)<<1} Working with the Calendar Views

# Assigning Activities and To-Dos

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

If you have been granted `Schedule/View` rights to another user's calendar, you will be able to toggle to a user's schedule and create activities and To-Dos directly on their calendar exactly as you would on your own. You may also create activities while viewing your own calendar and *assign* them to a user who has granted you rights. Users may also assign tasks to you that will appear on your calendar.

The person a task is *assigned by* can be anyone with access to your calendar: you, your boss, your secretary, your assistant, or a colleague. The person a task is *assigned to* is the person on whose calendar the task will appear.

By default, the name of the currently logged in user will appear in both the `Assigned By:` and the `To:` fields in the Activity and To-Do dialog boxes.

## To Assign an Activity or To-Do to Another User:

1. Access the Activity or To-Do dialog box either by adding a new activity or To-Do, or by highlighting an existing activity or To-Do and clicking **Edit**. (Add a new activity following the instructions in the Scheduling Activities (Phone Calls, Appointments, and Meetings) topic. Add a new To-Do following the instructions in Adding To-Dos .)
2. Click the `To:` list arrow to the right of the `Assigned by:` field and select a name from the drop-down list.
3. If you would like the user to receive a pop-up notification of the assignment, mark the `Notify` check box. (This is particularly useful if the user needs to know about the assignment right away.)
4. When you have finished, click **Save**.

   The activity or To-Do will appear on the user's calendar. If you marked the `Notify` check box in step 3, the user will receive a pop-up notification informing him or her of the new activity. Additionally, an Accept/Reject Activity Assignments dialog box will appear when the receiving user logs in. (This dialog box is also available by selecting **View Assigned Tasks**, **Pending Assigned to You** from the **Activity** menu.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Multi_User_Calendars)<<1}

# Acknowledging, Accepting, and Rejecting Assignments

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

When another user assigns you a task, you will receive an Accept/Reject Activity Assignment dialog box. This dialog box will pop up when you next log in or when you select **View Assigned Tasks**, **Pending Assigned to You** from the **Activity** menu.

If you are assigned an activity by another user, you can add a comment to, then accept or reject the activity. Do not delete it unless no reply is required. If you do not intend to complete an assigned activity and delete it, the user who originated it will not be able to complete it himself or assign it to another user.

## To Accept or Reject an Assignment:

1. From the **Activity** menu, select **View Assigned Tasks**, **Pending Assigned to You**.

   The Accept/Reject Activity Assignment dialog box will open.

2. Use the following guidelines when accepting or rejecting activities:

   - Double-click on an activity to accept it. A check mark will appear in the `Accept` column.
   - If you have multiple pending activities, to accept all of the assigned activities, choose **Accept All**.
   - If you have accepted an assignment in error, double-click on it. The check mark will move to the `Reject` column.
   - To reject all assignments, choose **Reject All**.

3. To view or add a comment to an assignment, select the assignment and click **Add comment to highlighted**.

   The Comment for Pending Assignment dialog box will open. The text region on the top will allow you to add new comments to the activity. The text region on the bottom will allow you to view any comments previously entered.

4. If desired, use the **Stamp** button to stamp the date, time, and your user ID into the comment; then type your response into the `Add a New Comment` field.

   Your comments will appear both in the Comment for Pending Assignment dialog box and in the `Comments` section of the related Activity dialog box.

5. Click **OK**.

   You will return to the Accept/Reject Activity Assignment dialog box.

6. Click **OK**.

   Any assignments with a check mark next to them when you click **OK** will be accepted. Any assignments with no check mark will be rejected.

   If you accepted an assignment, it will appear on your calendar with `Accepted Activity` in the title bar. If you rejected an assignment, it will appear on your calendar with `Rejected Activity` in the title bar (indicating no one is currently handling it) until the user who originally assigned it to you assigns it to another user or deletes it.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Multi_User_Calendars)<<1}

# Viewing Assigned Tasks

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

Assigned tasks fall into two categories: those you have assigned to others and those that have been assigned to you. Assigned tasks may be accepted, rejected, or pending (not yet accepted or rejected). You can access a dialog box that will let you view a complete list of all tasks you have assigned to others, or toggle to a list of pending tasks that others have assigned to you.

## To View Assigned Tasks:

1. From the **Activity** menu, select **View Assigned Tasks**, **All Assigned Tasks**.

   The Tasks Assigned dialog box will open. Assigned activities appear on the top. Assigned To-Dos appear on the bottom.

2. To view the list of activities and To-Dos that have been assigned to you, select the `to you` radio button under `List tasks assigned:`.

**or** To view the list of all activities you have assigned to other users (accepted, rejected, pending, and completed) select the `by you` radio button.

The list will toggle accordingly.

3. Use the `Index on:` radio buttons to set the order of the items on the list:

   - Select `Status` to sort by the item's status. When this is selected, pending activities will appear at the top of the list, followed by rejected, then accepted, then completed.
   - Select `User` to sort by the user to whom the activity was assigned if you are viewing activities assigned by you; or the user who assigned you the activity if you are viewing activities assigned to you.
   - Select `Date` if you would like to toggle by the activity's due date.
   - Select `Description` if you would like to view the list in alphabetical order by description.

2. When you have finished reviewing the list, choose **Close**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Multi_User_Calendars)<<1}

TeleMagic's Activity Reports feature offers you several pre-formatted reports that give you an overview of your pending and/or completed activities, extended activities and To-Dos and allow you to chart all users' productivity.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_History_Report)<<1} Activity History Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Schedule_Reports)<<1} Activity Schedule Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Daily_Schedule_Report)<<1} Daily Schedule Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Pending_Activity_Report)<<1} Pending Activity Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

# Changing the Configuration of the Activity Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

The Activity Manager can be easily reconfigured to meet your immediate needs. As your needs change, you can set your calendar display to show exactly what you need in as much detail as you require.

## To Change the Configuration of the Activity Manager:

1. Click on the View Your Schedule button:

   The Activity Manager will open.

2. On the Activity Toolbar , click on the Toggle button.

   The Calendar Toolbar will open.

3. Click on the Configuration button corresponding to the number and arrangement of sections you want on your calendar.

   The Activity Manager will be reconfigured to the new layout.

4. Click on the section of the screen you want to reassign to another view.

   The selected section will be highlighted.

5. Click on the View button which corresponds to the type of view you want displayed in the selected section.

   The selected section will be changed to the selected view.

6. Repeat steps 4 and 5 for all sections of the Activity Manager you want to reconfigure.

   When you close the Activity Manager your new configuration will be saved automatically.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager Contents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_the_Calendar_Views)<<1} Working with the Calendar Views

## Note for Step 5

If a user has reserved this resource with an activity, you will receive a message stating that the resource cannot be deleted and giving you the name of the user who has reserved it. This resource must be removed from the user’s activity before it can be deleted.

## Hint for Step 5

Think about whether or not this holiday is a working day when deciding if you would like to receive a warning. If you will not be working on the holiday, you will probably want to be warned if you attempt to schedule on that date. If you will be working on that day, it will probably not matter if you schedule items. This will also affect whether activities automatically generated by TeleMagic are scheduled on this date. If you are setting a recurring activity and you select not to schedule on holidays, only holidays for which you have selected `Warn when scheduling on a holiday` will be taken into account.

## Note for Step 7

It is a good idea to periodically remove holidays that have already passed from the list.

## Note for Step 2

It is possible to attach a list box to this and most other fields on this dialog box. See Adding Data Using List Boxes for information on creating and selecting from list boxes.

## Hint for Comments

If you have linked the To-Do to a contact in step 8, click `Paste Contact Info` to place the linked contact's name, address, main phone, and fax number in the `Comments` field.

## Note for Description Field

It is possible to attach a list box to this and most other fields on this dialog box. See Adding Data Using List Boxes for information on creating and selecting from list boxes.

## Note on Display Preferences

If your Display preferences are set to the 12-hour clock, and you type an hour from 0 to 12 without indicating a.m. or p.m., TeleMagic will presume that you mean the *current* 12 hours (i.e., if it is now p.m., TeleMagic will make your time p.m.)   However, if you type an hour from 13 to 23, TeleMagic will convert the hour to the corresponding 12-hour clock time, followed by “p” (for p.m.).

## Note for Step 7

The activity type `Letter` is reserved for activities created during a TeleMagic merge using the word processing feature. Activities with the type `Letter` are only available through Activity Browse; they do not appear on the calendar. You should avoid giving your activities the type `Letter` (or a type starting with `Letter`) if you want to see them on the calendar and be able to edit them later.

## Note on Page Check Box

If the user to whom the activity is assigned is not set up to receive wireless messages, the `Page` check box will be dimmed.

## Hint for Step 17

Whenever a user logs into TeleMagic, he or she will receive a dialog box listing all new activity assignments. The Notify option is useful for users who already are logged into TeleMagic when the activity is assigned. With this option selected, the user will not have to wait until he or she next logs in to learn about the assignment.

## Hint for Activity Comments

If you have linked the activity to a contact in step 11, click **Paste Contact Info** to place the contact's name, address, main phone, and fax number in the `Comments` field. (Be aware that if you later change the activity link, this information will need to be manually edited in the `Comments` field.)

## Note for Step 22

If you will be creating a group activity that uses resources, you can perform both functions when setting up the group.

## Note for Step 3

If the contact is in another database, you will be informed of the fact that there will be a slight pause as TeleMagic retrieves the data and given the opportunity of proceeding or not. Click **Yes** to continue or **No** to abort. If you select **Yes**, TeleMagic will open the database and retrieve the information. When you have finished viewing the linked contact information, you will be returned to your current database.

## Hint for Step 4

When this window is open, **Text** is added to the main menu. Options on this menu let you select the font and spacing of the text in this window.

## Note on Holidays

This will only apply to activities falling on a holiday if you have selected the `Warn when scheduling on this holiday` radio button in the Holiday Record dialog box for this holiday. See Holiday Maintenance for more on the options available when setting up holidays.

## Note on Availability

If you have scheduled the activity on a time when users are not available and you do not search for availability, when you save the activity you will be informed of any scheduling conflicts. You can search for availability at that time, if desired.

## Note for Start Time

By default, `Start Time:` will display 8:00 a.m. unless the activity is being scheduled on the current day. In this case, the time will default to the current hour.

## Note for Activity Duration

If you change the amount of time in the `Activity Duration:` field, the `Duration:` field in the Activity dialog box will also change.

## Hint for Activity Duration

Smaller durations can dramatically increase the time it takes to generate the list of available times. Consider setting a higher duration for the purpose of searching, then set the duration back once the time slot is selected.

## Hint for Step 28

If the activity can be scheduled at any time during your selected time and date range, you can use the first available time slot. In this case set the `Number of Slots:` to 1. If you would like to be able to choose from a selection of available times, set a higher number. Be aware that the more available slots that must be generated, the longer the search will take.

## Note on Available Time Slots

If you are also using resources, the list will show only those times that both the users and resources are available.

## Note on Available Time Slots

If you receive a message that there are no time slots found, there are no times at which all of your selected users and resources are available within your selected search criteria. You can either broaden the search, or use browse to determine which users/resources are not available. (See step 31 for information on browse.)

## Note on Activity Dialog Box

If you have selected a date, time and/or duration different from that selected when originally setting up the activity, these fields will be updated on the Activity dialog box.

## Note on Activity Conflict

If you have scheduled at a time when both users and resources are not available, you will be notified of the resources first. If you select to ignore the conflict with the resources, a separate dialog box will appear detailing the users not available.

## Note on Resources

This list will include all resources, whether or not they are available at the currently selected time for the activity.

## Note on Resources

If any of the resources you are attempting to reserve for this activity are already assigned, you will receive a message at this time. For more information, see Resource Allocation Conflicts.

## Note on Availability

If you will also be assigning this activity to a group of users, this search will validate both the resources and the users. Consider setting up the users prior to performing the search. (See the topic Group Activities for more information.)

## Note for Start Time

By default, `Start Time:` will display 8:00 a.m. unless you are scheduling for the current day; in this instance it will default to the current hour.

## Note for Activity Duration

If you change the amount of time in the `Activity Duration:` field, the `Duration:` field in the Activity dialog box will also change.

## Hint for Activity Duration

Smaller durations can dramatically increase the time it takes to generate the list of available times. Consider setting a higher duration for the purpose of searching, then set the duration back once the time slot is selected.

## Note on Availability

If you receive a message that there are no time slots found, there are no times at which all of your selected resources are available within your selected search criteria. You can either broaden the search, or use browse to determine which resources are not available.

## Note for Step 28

If you have selected a date, time, and/or duration different from that selected when originally setting up the activity, these fields will be updated on the Activity dialog box.

## Note for Step 29

You may receive a message informing you of a conflicting assignment at this point. For more information, see Resource Allocation Conflicts.

## Hint for Step 2

There are spaces allotted on the Month view for up to three extended activities to be displayed on any one day. You will only be able to drag on days that do not already have three extended activities listed. If you want to schedule on a day with three extended activities, use the `Detail` check box, as described below.

## Note for Step 9

This list will be unavailable if you are creating a global activity.

## Note for Step 9

When an extended activity is assigned to you, you are not notified about the assignment, and you are not given the opportunity of accepting or rejecting it. It will simply appear on your Month at a Time calendar. If the user needs to be notified of the activity, consider sending him or her an e-mail or wireless message. To send an e-mail, see Composing and Sending a Message to send a wireless message, see Sending Wireless Messages.

## Note for Step 11

If more than three extended activities are scheduled on any users' calendars, the new activity will replace one of the existing activities on the display. To view all extended activities on any given day, highlight the day and mark the `Detail` check box in Month at a Time view. The extended activities will be listed in the detail display.

## Note for Step 1

This is the only place in Month at a Time view where To-Dos are accessible. Additionally, if you have more than three extended activities, this is the only place you can access the complete list.

## Note for Step 2

If your Display Preferences are set to use 24 hour time this is not available.

## Note for Step 6

Depending on the settings in the Activity preferences, if the actual time is not one that is shown on the daily schedule, you will be moved to the time slot which is closest.

## Note for Step 1

This menu option will be unavailable from the Activity Manager.

## Note for Step 1

If you have multiple activities scheduled in the same time slot (indicated by a “+” sign to the right of the activity), a pop-up menu will open. Click the activity you want to view in detail, and the related dialog box will open.

## Note for Step 3

If you have changed the activity time, it is highly recommended that you alert users to this fact.

## Note for Step 1

If you did not create the activity, but receive the standard Activity dialog box instead of the Group Activity dialog box, the user who created the group activity has assigned it to you. Refer to steps 1 through 3. (If you are creating a group activity and select another user in the `Assigned To` field in the Activity dialog box, that user will receive the master copy of the group activity and be responsible for maintaining it. This is useful, for example, if you want to have a secretary or assistant create the activity, but want to maintain it yourself.)

## Note for Step 4

This is the same dialog box that is used to add a group or resource to an activity. When editing a group activity created by another user, this dialog box is provided for display only. The editing options will be dimmed.

## Hint for Step 2

To-Dos are grouped by priority. To change the priority of a To-Do, make sure you drag the position selector box into the group of To-Dos with the desired priority.

## Note for Step 3

Once a To-Do is completed, it will only appear on the calendar on the date on which it was completed. Should you want to change an item's status back to incomplete, locate the To-Do and simply unmark its check box.

## Hint for Deleting Activities/To-Dos

If you change your mind about deleting an activity or To-Do, you can use the Undo button ( ⯃ ) to recover it.

## Note for Step 2

If no dates are selected in the `Date From:` and `Date To:` fields, all activities from the users selected will be archived. The archiving process will delete the selected user's activities from the Activity Manager and from any Activity and Contact History fields. If the archived activities are restored, they will not contain any of the associated "Comments".

## Note for Step 3

A supervisor user does not need to have been given access to other users' calendars in order to archive their activities. If you are not a supervisor user, you will only be able to archive your own activities.

## Hint for Step 6

Other users having the Activity Manager open is only an issue if they are storing their activity file in the same location as you. See Location of Activity Files for more information on activity file locations.

## Hint for Step 6

If no other users are editing any of the activities that are selected to archive, you should not have any problems selecting the Multi-User option. Instruct other users to not edit the calendar of the user selected in step 3, above, during the archive.

## Hint for Step 12

The archived files generated during this procedure can be re-imported at a later date if required.

## Note for Step 4

If you mark this check box, there is a risk that you may overload the nearest workday. For example, if you have recall activities scheduled every 15 minutes that are rolled over to a weekend, with this check box marked, all activities for Saturday, Sunday, and Monday will fall on Monday. If you have a very full schedule, consider leaving this check box unmarked and either separately rolling over the weekend and holiday activities to a free day, or manually moving each activity as necessary.

## Note for Step 6

If there are no incomplete activities scheduled during the specified date range, you will receive a message informing you of this fact.

## Note for Step 7

If there are no incomplete activities scheduled during the specified date range, you will receive a message informing you of this fact.

## Note for Step 2

Selecting 0 (zero) minutes disables the alarm function. If you set the snooze interval to 0, you will receive no alarms.

## Note for Step 10

If a user's permissions are changed while that user has the Activity Manager open, all previously existing rights will remain in effect until the user closes the Activity Manager and then reopens it. At that time the new security rights will become active.

## Note for Step 2

If a user's permissions are changed while that user has the Activity Manager open, all previously existing rights will remain in effect until the user closes the Activity Manager and then reopens it. At that time the new security rights will become active.

## Note on Viewing the Calendar of Another User

Your ability to view or change other users' calendar schedules depends upon whether or not other users have granted you permission, or *rights*, to their calendars. See: Controlling Others' Access to Your Calendar for more on calendar access rights.

## Note for Step 2

If you toggle to the Contact Manager without closing the Activity Manager, then select to set a recall from the **Activity** menu, the recall will be set for the user whose calendar is currently open.

## Note for Step 2

If you are using Data Synchronization Server, you may see users on this list who do not exist at the current installation of TeleMagic. If this activity is also linked to a contact, the activity will only be synchronized if the contact's record is also synchronized. If the user does not exist at the current site, and the database is not being synchronized, you will need to change either the assignment or the link before you can save the activity. If the database is being synchronized to any site, you will be able to save the activity, but it will only be synchronized to the user if he or she exists at a site that is receiving this record. Before assigning activities associated with records to users at other sites, make sure the user is working that record. You should also be sure that the other user's site is configured to receive activities during synchronization. Ask your system administrator for details.

## Note for Step 4

If you have assigned activities to another user, and they do not appear on that user's calendar, both you and the other user should check the `Location of Activities Files` field in Activity preferences. If your directories are stored in different locations, it does not matter what calendar access rights you have, you will not be able to schedule activities for one another. (The activity actually will be scheduled for the user, however, the user will be viewing a different list of activities and will not be able access the assigned activity.) Resolve the problem by having all users point to the same storage location (ideally your global TeleMagic directory.) See the topic Location of Activity Files for more information.

## Hint for Step 4

If you intend to reject the assignment, it is a very good idea to include a comment indicating why the assignment was rejected.

## Note for Step 5

If you exit without accepting or rejecting an assignment, it will remain pending. You will continue to receive notification each time you log in.

## Hint for Associating Activities to Contact Records

There is an activity preferences setting that links all new activities to the current contact by default. See the topic Link to Current Contact by Default for more information.

# Hint on Viewing Activities and To-Dos

If you have not yet added any activities or To-Dos to your schedule, sample data has been provided on the calendar for 1999. To review dates in 1999, see Going to a Specific Date or Time. (Consider reviewing April 29, 1999, as it provides a number of activities, extended activities, and a To-Do to explore.)

## Notes for Step 3

If you have granted rights to your calendar to other users, be aware that an activity can only be edited by one user at a time.

If you want to change an activity that was assigned to a group of users, you will only be able to fully edit the activity if you were the user who originally created it. (See To Edit a Group Activity: for more information.)

## Note on Deleting To-Dos

If you want to delete more than one To-Do, you may archive a group of To-Dos. See To Delete and Archive a Group of Activities: for more information.

## Note for Step 5

Should you want to change an item’s status back to incomplete, simply click on its check box. This will remove the check mark.

## Note on Activity Rollover

Activity Rollover is used to move activities on a user's calendar to a different date. If you want to move activities to a different user's calendar, use the Reassign Incomplete Activities feature, detailed in the Reassign Incomplete Activities topic.

## Note on Reassigning Incomplete Activities

The Reassign Incomplete Activities feature is used to reassign activities from one user to another. If you want to reassign a group of activities to a different date for the same user, use the Activity Rollover feature detailed in the Activity Rollover topic.

## Note on Multi-User Calendars

There is an Activity preference that allows you to select a location to store your activities. Storing your activities in any place other than the default results in other users not being able to share activities with you or access your calendar. See the Location of Activity Files topic for more information.

## Note for Step 3

Although you cannot edit the linked contact's information or notepad from this dialog box, you can change which contact the activity is linked to. You can also break the link between the activity and the currently linked contact. To save any such changes, use **OK** to exit. Using **Cancel** to exit will close the dialog box without saving any changes.

## Note for Step 4

Records with no value in a sort field will all be moved to the beginning or end of the record list depending on whether the index was originally defined as ascending or descending. See step 14 under the instructions in To Create a New Index for details.

## Note for Step 3

This dialog box will reflect the names of the database levels in the current database.

## Note for Step 8

This example will create an index that will sort on a single field. If you want to sort on multiple fields, see the To Create a Multiple-Field Index with all Fields of the Same Type or To Create a Multiple-Field Index with Fields of Different Types topic. If you want to create an advanced expression, see the To Create an Advanced Index topic.

## Note for Step 10

If you do not choose `Case Sensitive`, an UPPER() statement will be automatically added to your expression. This statement is used to instruct TeleMagic to *not* pay attention to case by viewing everything in a character field as uppercase. This statement can only be removed from the expression by marking `Case Sensitive`.

## Note for Step 15

If you have selected an index for use with the See Only feature, it will only be available when that feature is in use. You will not see it on the list of indexes when See Only is turned off. Conversely, if an index is not selected for use with See Only, you will not see it on the list of indexes when you are not using See Only.

## Hint for Step 15

If you would like to use a date or numeric index with the See Only option, create an expression to convert the data in the field to a character string. See step 8 of To Create a Multiple-Field Index with Fields of Different Types: for information on converting your fields to character.

## Note for Step 17

If you are creating more than one index, create all your indexes first, then rebuild them.

## Note for Step 3

This dialog box will reflect the names of the database levels in the current database.

## Note for Step 9

The order of the fields in the expression is important. When the index is used, the records will be sorted on the first field, then sub-sorted on each subsequent field. (For example, if you select the County field, records will be grouped and alphabetized by the contents of the County field. If your next field is Region, records in the same county will be further sorted by region, and so on.)

## Note for Step 10

Every field selected must be the same field type; i.e., you cannot select a mixture of character and date fields, or date and numeric fields, etc.

If you are using numeric fields, you must convert the numeric field to a character field in the expression. If you do not, instead of sub-sorting on the second field, the index will add the fields together and sort on the total. To convert a numeric field to a character field, use the **str()** function. For an example of using this expression in an index, see the second bullet in step 8 under To Create a Multiple-Field Index with Fields of Different Types.

## Note for Step 11

If you receive an “Expression Invalid: Operator/operand type mismatch” error message, you have fields of multiple types in your expression. Either select fields of the same type or see To Create a Multiple-Field Index with Fields of Different Types.

## Note for Step 12

If you do not choose `Case Sensitive`, an UPPER() statement will be automatically added to your expression. This statement is used to instruct TeleMagic to *not* pay attention to case by viewing everything in a character field as uppercase. This statement can only be removed from the expression by marking `Case Sensitive`.

## Note for Step 17

If you have selected an index for use with the See Only feature, it will only be available when that feature is in use. You will not see it on the list of indexes when See Only is turned off. Conversely, if an index is not selected for use with See Only, you will not see it on the list of indexes when you are not using See Only.

## Note for Step 19

If you are creating more than one index, create all your indexes first, then rebuild.

## Note for Step 8

Entering the field length and number of decimal places allows you to properly sort fields with decimals. If you do not know the field length or number of decimal places, omit them. The index will sort to the largest whole number.

## Note for Step 8

Be aware that converting a numeric field to a character may affect the way the data is sorted. When sorting numbers in character fields, TeleMagic evaluates the value of each digit from left to right, not the actual value of the number. For example when sorting 1 through 11 as characters, TeleMagic will arrange them 1, 10, 11, 2, 3, etc. Numeric fields that are not converted to character will correctly sort in numeric order.

## Note for Step 8

dtoc() translates your date into a character, so TeleMagic would read 11/13/98 as 111398. Because of this, if you have dates spanning multiple years, they may not be sorted correctly. (For example, 08/17/99 would come before 11/13/98 in ascending order, even though the date is later, because the number 081799 is smaller than 111398.)  If you need to keep the dates in order by year, consider using dtos(), which sorts first by year, then by month, and finally by date. If you do use dtos(), you should alert users to match the year/month/day format when using Goto to search for records based on this index.

## Note for Step 8

Phone fields and unique number fields do not need to be converted to character.

## Note for Step 10

If you do not choose `Case Sensitive`, an UPPER() statement will be automatically added to your expression. This statement is used to instruct TeleMagic to *not* pay attention to case by viewing everything in a character field as uppercase. This statement can only be removed from the expression by marking `Case Sensitive`.

## Note for Step 1

If you have not changed any indexes, only system indexes will be rebuilt.

## Note for Step 4

If you select an index which contains fields that do not exist in the current database, you will not be able to create a copy.

## Note for Step 5

This list will include all fields in the database, regardless of their level. See the Choosing Filters heading for more information on how selecting a filter based on another level will affect the records you are able to view.

## Note for Step 7

If you want to use the value zero (0) in reference to the contents of a numeric field, you will have to create an expression using the **Advanced** button on the filter builder dialog box. See the To Create an Advanced Filter topic.

## Note for Step 7

If you only want to filter on tagged records, you can select the already existing `Tagged Records` filter. The .TAGGED condition would be used if you are creating a multiple comparison filter that includes a specific group of records, plus any tagged records. (e.g., All tagged record with CA in the State field.)

## Hint for Step 8

When deciding to use `And` or `Or` in a filter, think carefully about what you would like to have the filter do. For example, you may want a filter to find all companies located in California and Arizona. You would need to use `Or` in this filter to tell TeleMagic to show you records in *either* California or Arizona. If you used `And` in this instance, a company would have to be located in both California *and* Arizona.

## Note for Step 7

TeleMagic will evaluate the expression to make sure it is valid. If this is not a valid expression, you will be given a warning. Correct the expression and click **OK**.

## Note for Step 2

If you select a filter that is not compatible with the current database, you will receive an error when you try to copy.

## Note for Step 5

In addition to being able to filter on the actual text appearing in the field, you can use the following conditions: .EMPTY will find fields containing no data; .TODAY can be used with date fields to locate records containing today's date.

## Note for Step 6

This “on the fly” filter will remain attached to the `Field Search` option until you change to another filter.

## Note for Step 3

The level names will reflect the names of the levels in the current database.

## Hint for Step 5

When a filtered index is used, only records in that filter will be available, even if another filter is selected on the Contact Manager Toolbar. Due to this, we strongly recommend that you include an indication in the index name that this is a filtered index so that other users choosing it will not be confused.

## Note for Step 6

If the `Index Filter` list is unavailable, there are no filters that meet the criteria for use in a filtered index.

## Note for Step 6

If the filter which is being used in a filtered index is changed so that it no longer meets the criteria specified in this step, as soon as a rebuild is run the filtered index will become invalid. It will no longer be available on the list of indexes in the Contact Manager. You may want to consider editing the name of the filter to indicate its use in a filtered index and instructing users not to edit it. (The index will appear in the Edit Indexes dialog box from which it can be repaired.)

## Note for Step 1

The Goto dialog box offers two separate sets of options: buttons on the right open specific program features; and text fields on the left let you navigate the Contact Manager and search for records. The buttons located on the right side of this dialog box do not in any way relate to data typed in the text boxes. Clicking **OK** in the Goto dialog box accepts the settings you specified in the text boxes only.

## Note for Step 1

`Find:` is used to locate specific contact records. See the Searching for Specific Records topic for details on using `Find:`.

## Hint for Step 2

If you are searching for an entry in the RCL field, you can use abbreviated date entries. If you leave the `Find:` field blank, you will be taken to your first call. If you just enter a month, you will be taken to the first recall for that month in the current year. If you enter the month and day, you will be taken to the first recall on that date (or the nearest match) in the current year.

## Note for Step 4

If an index uses multiple fields, only the first one will be used for the search. If you would like to search for the data across multiple fields, see below.

## Note for Step 4

If you select `Multiple Index Search` from the list, it will be offered as a default the next time you access the Goto dialog box.

## Note for Step 9

If you have a filter set, you will not go directly to browse. Instead, a message will appear asking if you would like to access browse. Bear in mind that if you have a large number of records in the database, it can take a significant amount of time to access a browse window with a filter set. If you choose **Yes** at this message, you will be taken to browse. If you choose **No** at this message, you will be returned to the record from which you accessed Goto.

## Note for Step 8

If no record matches the search, you will receive a Record Not Found message and be returned to the Contact Manager.

## Note for Step 3

The selections in the drop-down lists on the left side of the Goto dialog box do not relate to the buttons on the right. Selecting a filter and index from these lists will not affect the information displayed in the Browse window. You must select any desired filter and index in the Contact Manager before accessing Browse.

## Note for Step 3

Up to a maximum of 225 fields will appear at any given time in a Contact Manager browse window.

## Note for Step 6

Tags are user specific. If other users have tagged records in the database, they will not be affected.

## Hint for Step 6

If you would like to perform duplicate record checking, but do not want to lose your tags, select **No** at the prompt. In the Contact Manager, change to the Tagged Records filter and mark all of your tagged records (click the `Marked` check box on the Contact Manager Toolbar). Perform the duplicate record checking and select **Yes** to clear the existing record tags. After you have finished working with the duplicate records, select **Contact**, **Tags**, **Clear All** from the Main menu to clear the tags, then select **Contact**, **Tags**, **Tag Marked**. Your tagged records will be restored.

## Note for Step 2

Level 1 records are not subject to reassignment. If you select this option while on level 1, you will receive a message informing you that TeleMagic is unable to reassign the record.

## Hint for Step 2

To delete a Level 1 or Level 2 record without deleting its associated child records, reassign the child records to another parent record first. See Reassigning Child Records for more information.

## Note for Step 4

If a user who has not granted you rights to his or her calendar has an activity linked to this contact, that activity will be retained, but the link will no longer be valid. A note will be stamped into the `Comments` field indicating the date and time the related record was deleted and by whom.

## Note for Step 4

The Delete button  on the Contact Manager toolbar will change to an Undelete button in the event you want to undo your action. To restore the record, click the Undelete button *before* you move off the deleted record. (If you have moved off the record and want to undelete, see To Recover Records: for instructions on group recover.)

## Note for Step 2

This dialog box will reflect the level names in the current database.

## Note for Step 7

After recovering records, rebuild the database immediately to update all indexes.

## Note for Step 8

This option does not just apply to Call type activities.

## Note for Step 8

If you set a day specific `Call back in` time period (as opposed to time specific—i.e., minutes or hours), the activity will be scheduled at the time displayed in the dimmed `at` field.

## Note for Step 15

Smaller durations can dramatically increase the time it takes to generate the list of available times. Consider setting a higher duration for the purpose of searching, then set the duration back once the time slot is selected.

## Hint for Step 16

If the activity can be scheduled at any time during your selected time and date range, you can select the first available time slot. In this case set the `Number of Slots:` to 1. If you would like to be able to choose from a selection of available times, set a higher number. Be aware that the more available slots that must be generated, the longer the search will take.

## Note for Step 3

If you would like to set a recall using the RCL field instead of using the Contact Manager, see the To Set Multiple Contact Based Recalls topic.

## Note for Step 14

If you select this option, make sure you have some way of keeping track of which contacts have received activities. Once the first set of activities has been completed, you can modify your filter to exclude these contacts and create activities for the next group of records.

## Note for Step 15

To avoid forcing users to manually accept each of the assigned activities, the Accept/Reject Activity Assignment dialog box will not appear. If you want to alert users of the assigned activities, mark this check box.

## Note for Step 20

This will set an alarm for *every* activity. As a general rule, you should not set an alarm for multiple activities.

## Note for Step 21

If this check box is unavailable, make sure that you have a field named LCL in the database and that you are scheduling a Call type activity.

## Note for Step 11

If this check box is unavailable, check to make sure that you have a field named LCL in the database.

## Hint for Step 2

When this window is open, Text is added to the main menu. Options on this menu let you select the font and spacing of the text in this window.

## Note for Step 2

If there are no activities or To-Dos to display, the only available buttons in the Pending Activity List will be **Add** and **Close**.

## Note for Step 3

Your position on this list remains the same throughout one session of TeleMagic. In other words, if you close this dialog box while viewing your activities for next Monday, when you reopen it, the same activities will be displayed. The dialog box will not revert to today's date until you close TeleMagic, or manually return to that date.

## Note for Activity History Rollup

This list may or may not include activities to which you do not have security access. Whether the activity history fields (as well as the Activity List) display a complete history of linked activities or filter by security is subject to Database preferences. See the topic Apply Security in Activity Lists for details.)

## Note for Activity List

This list may or may not include activities to which you do not have security access. Whether the Activity List (as well as any activity history fields) displays a complete history of linked activities or filters by security is subject to Database preferences. See the topic Apply Security in Activity Lists for details.)

## Note for Step 3

When added from the Activity List, the activity will be linked to the current contact by default.

## Note for Step 1

If you select this option and you have not processed an initialization packet through Data Synchronization Server, you will receive a message that transaction logging is inactive and that records cannot be initialized. To proceed, you must process an initialization packet.

## Contact Management

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Understanding Contact Databases
The Contact Manager
Adding Contact Records
Entering and Editing Data
Working with Records
Viewing Contact Records
Sorting, Selecting, and Finding Records
Handling Activities in the Contact Manager
Closing the Contact Manager

# Understanding Contact Databases

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

What's a Database?
What's a Contact Database?
What's a Relational Database?
Understanding Views
Opening a Different Database

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_The_Contact_Manager)<<1} The Contact Manager
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## What’s a Database?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

A database is a collection of data related to a topic or purpose. A public library book catalog, a student’s term paper notes on 3” by 5” cards, a bookkeeper’s general ledger and a trade school’s enrollment records are all examples of databases. Most businesses use one or more databases to store and retrieve information about their day-to-day operations.

Many popular database applications have been developed to make computer storage of these databases possible. Some of these are sold in a fixed format that allows the user very little say in what information will be stored, or how. At the other extreme, some database applications require the user or installer to have extensive programming knowledge in order to tailor the database to a specific task. TeleMagic falls between these extremes.

Database applications are written in a variety of programming languages. These various languages have varying advantages and disadvantages in terms of graphic display, compatibility across various hardware and software systems, and processing speeds. TeleMagic belongs to the xBase/FoxPro family of databases, known for exceptionally fast record-handling and flexible cross-platform programming ease.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Contact_Database)<<1} What’s a Contact Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Relational_Database)<<1} What’s a Relational Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Understanding_Views)<<1} Understanding Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Databases)<<1} Understanding Contact Databases

# What’s a Contact Database?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

A contact database is a database that has been carefully structured especially for users who need to track information about people and the companies for which they work. Contact databases are used by business people in areas such as sales, customer relations, human resources, and telemarketing. They are also popular among health, legal, real estate, and religious professionals.

This does not mean that TeleMagic can only be used to store contact-related information. On the contrary, TeleMagic’s structure is completely user-definable. You can create databases to store any information you need to track. However, many TeleMagic features, such as faxing and wireless messaging, are designed to work with records related to people.

Many contact database applications have appeared on the market since the mid-1980’s. As with database applications in general, some have fixed formats with very few options for customization to an individual user’s needs. Others are so sophisticated that they require professional consultants to design and install them. TeleMagic falls somewhere between these extremes. On the one hand, TeleMagic includes sample contact databases which you can use “out of the box” for your own records. On the other, TeleMagic is completely user-definable. This means that you are not in any way limited in how you store your data, or even in what data you store.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Database)<<1} What’s a Database?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Relational_Database)<<1} What’s a Relational Database?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Understanding_Views)<<1} Understanding Views
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Databases)<<1} Understanding Contact Databases

# What’s a Relational Database?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Hint_for_Relational_Databases)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

No matter how you enter data into a database application, it is stored by your computer in a very specific format.

Imagine a grid, with headings at the top of each column and at the start of each row:

| | Name of Column 1 | Name of Column 2 | Name of Column 3 |
|---|---|---|---|
| Row 1 | | | |
| Row 2 | | | |
| Row 3 | | | |
| Row 4 | | | |
| Row 5 | | | |

Each column heading is the name of a field. Each row of information is a record. In other words, a record is simply one set of data collected in a group of fields. Any database consists of a number of records organized by fields:

| | Field 1 | Field 2 | Field 3 |
|---|---|---|---|
| Record 1 | | | |
| Record 2 | | | |
| Record 3 | | | |
| Record 4 | | | |
| Record 5 | | | |

**Generic Blank Database**

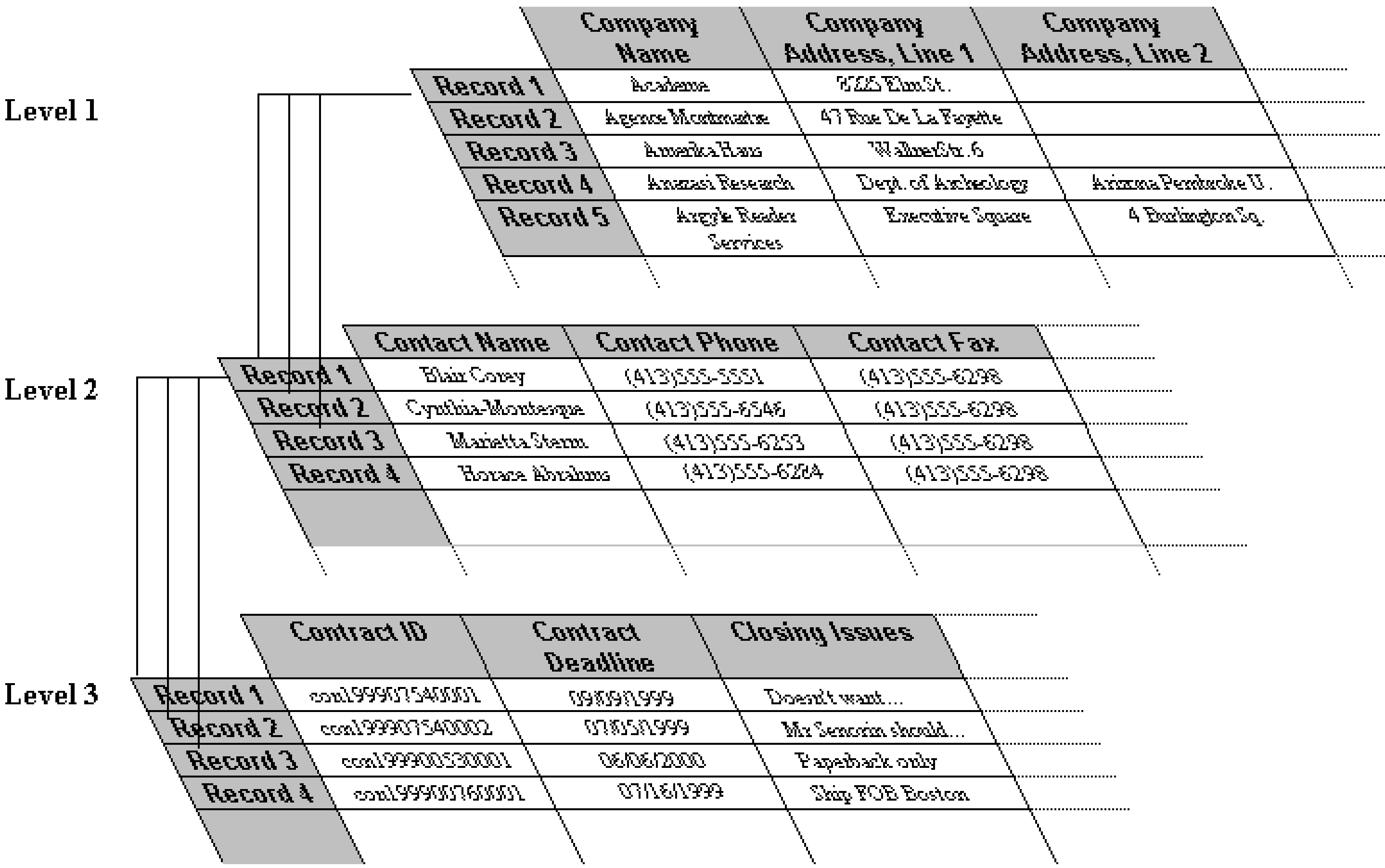
In TeleMagic, the set of fields (represented in our example by column headings across the top of a grid) that defines which pieces of data you can store is called a level:

| | Company Name | Company Address, Line 1 | Company Address, Line 2 |
|---|---|---|---|
| Record 1 | Academe | 8225 Elm St. | |
| Record 2 | Agence Montmartre | 47 Rue De La Fayette | |
| Record 3 | Amerika Haus | WallnerStr. 6 | |
| Record 4 | Anazasi Research | Dept. of Archeology | Arizona Pembroke U. |
| Record 5 | Argyle Reader Services | Executive Square | 4 Burlington Sq. |

**Tabular Example of Part of a “Level” in a TeleMagic Database**

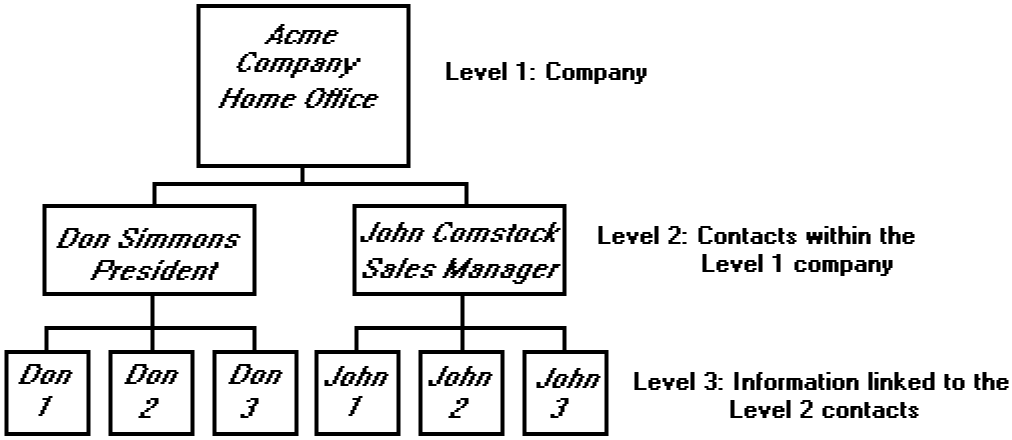
There are two types of database applications: relational and non-relational (“flat file”). A non-relational (flat file) database allows you to store records in only one level. This means that if you wanted to store information about a group of people in a single company, you would have to re-type the information about the company on a separate record for *each person* who worked there. There would be no way to keep one record with all the company information, and *relate* it to all the other records for the people who worked there.

A relational database (like TeleMagic) allows you to organize fields into more than one level. This means that you can keep records with one kind of information at one level, and relate them to records containing a different kind of information at another level. These levels can be arranged in a hierarchical pyramid, so that each record at the top level can be related to many records at the next level (a “One-to Many” relationship) and each record at the next level can also be related to many records at the level below it. This way, you do not have to re-type information that is common to many records:




**How TeleMagic Levels Inter-connect**

For example, you might do business with many people, all of whom work for the same company. At the top level, you might store information about the company. At the next level, you might store information about each person who works for that company. You might even need to store a third level of information, say, the information about each individual contract or agreement you hold with each person:




**One-to-Many Hierarchy Database Structure**

The Documentation database is organized in this fashion. This database is not the only way you could organize your data using TeleMagic. We provide it to help you learn how a relational database works, and how it can save you time and effort. With experience, you'll think of ways to organize a relational structure that is best for you.

Another way of looking at the structure of a relational database is to picture a family tree. An individual may have one, or many children, who in turn may have children of their own. Following this metaphor, Level 1 records are sometimes called "parents" in regard to Level 2 records; and Level 2 records are called parent records when discussing Level 3 records. Hence a Level 2 or Level 3 record can be referred to as a "child" record.

TeleMagic is a relational, user-definable database which includes custom contact management templates. Additional templates are available for a variety of user needs. This documentation also includes instructions on designing your own databases. See the Designing Databases topic for complete instructions on setting up your own database from scratch. If none of our "out of the box" solutions are quite right for you, consult your TeleMagic Reseller for help in designing the database structure that will best suit your needs.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Database)<<1} What's a Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Contact_Database)<<1} What's a Contact Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Understanding_Views)<<1} Understanding Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Databases)<<1} Understanding Contact Databases

# Understanding Views

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Each database level is composed of Views. A View is all of the pages that make up the level. For example, in the Documentation database, Level 1 is made up of the Company Data and Company Profile pages. The first page displays basic address information. The second page displays more detailed information, such as the names of the officers in the company and its annual revenue.

It is possible that some of your staff may need to only view the Company Data page, or they may need to view the address and financial data, but none of the other information. You can create additional Views for any level to accommodate this. This allows users to select a View that only contains the pages they need to see, laid out in the best manner for their needs.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Database)<<1} What's a Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Contact_Database)<<1} What's a Contact Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_What_s_a_Relational_Database)<<1} What's a Relational Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Databases)<<1} Understanding Contact Databases

# Opening a Different Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

## To Open or Change a Database from the File Menu:

1. From the **File** menu, choose **Select Database**.

   The Select Database selection box will appear.

2. Highlight the name of the database you want to open using the mouse or the UP/DOWN ARROWS.

   **Example:** Documentation Database

3. Press ENTER or click **Open**.

   The Select Database selection box will disappear, and the database you selected will open.

   When the database is opened, one of two things will occur:

   If a default view has been established for this database, the Contact Manager will open to the default level and page.

   **or** If you have not selected a default view, you will see the Select View dialog box.

   A view is all of the pages that make up one level of a database. For any database level you can have multiple views offering alternative ways of viewing records on the level. When a database is created, one or more views are designed to display contact information. Depending on how many views have been established for this database, you may see a single view, or any number of them. (The Documentation database contains only one view at each level.)

4. Highlight the appropriate view in the list and click **Select**.

   The Contact Manager will open.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Change_Databases_Using_Goto)<<1} To Change Databases Using Goto:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Databases)<<1} Understanding Contact Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_The_Contact_Manager)<<1} The Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Change Databases Using Goto:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. With the Contact Manager open, click the Goto button on the Contact Manager Toolbar: 

   The Goto dialog box will open.

2. Click **Database**.

   The Select Database selection box will appear.

3. Select the name of the database you want to open.

   **Example:** Documentation Database

4. Click **Open**.

   The Select Database selection box will disappear, and the database you selected will open.

   When the database is opened, one of two things will occur:

   If a default view has been established for this database, the Contact Manager will open to the default level and page.

   **or** If you have not selected a default view, you will see the Select View dialog box.

   A view is all of the pages that make up one level of a database. For any database level you can have multiple views offering alternative ways of viewing records on the level. When a database is created, one or more views are designed to display contact information. Depending on how many views have been established for this database, you may see a single view, or any number of them. (The Documentation database contains only one view at each level.)

5. Highlight the appropriate view in the list and click **Select**.

   The Contact Manager will open.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Opening_a_Different_Database)<<1} Opening a Different Database from the Menu

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_The_Contact_Manager)<<1} The Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# The Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

In TeleMagic, the Contact Manager is your window into databases. With the Contact Manager open, you can view, sort, add, edit, and delete records in the current database. When you open a database, the Contact Manager will usually open, showing records for that database. If it is not open, you will see a blank screen and you must open the Contact Manager.

## To Open the Contact Manager:

- From the **Contact Manager** menu, select **Open Contact Manager**.

  The default page of the current database will be displayed. In the Company/Contact database, this is the Company page (on Level 1). In the Documentation database, this is the Contact Data page (on Level 2). (To choose a different default view or page, see the Contact Preferences topic.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Adding_Contact_Records)<<1} Adding Contact Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Contact Manager Layout

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

In TeleMagic your contact database may have one, two, or three levels. For example, the Documentation database has three levels, named Company, Contact, and Contract Detail.

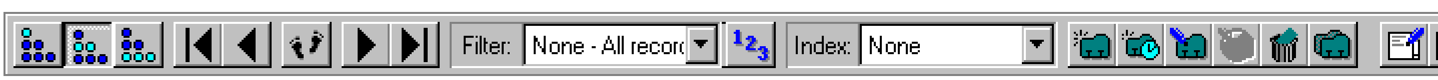
These levels are structured in a hierarchical fashion, much like a pyramid. In the Documentation database, the company level (Level 1) displays basic information such as a company's address, main phone numbers, and financial profile. For each company, you may have one or more people who are your contacts in the company. The contact level (Level 2) displays information about each person within a company, such as their name, phone numbers, and notes of conversations. For each of these contacts, you may have a number of sales contracts. The contract detail level (Level 3) displays information such as proposal dates, contract terms, and shipping address.

TeleMagic's powerful versatility allows you to store any information you want on any level of your database. The above example, based on the Documentation Database, is merely one common way of using TeleMagic. Although actual uses for the levels can vary, the basic relational structure will remain the same for all databases.

When you view records in any one level of the Documentation database, this three-level organization makes it possible for you to view only the contact records for a particular company, only the sales contract records for a particular contact, or all the records for a level.

In the Contact Manager each level is represented by a view. Views are made up of pages. For example, in the Documentation database, each level has two or three pages. At Level 2, the first page of the view shows general information such as the contact's name, title, and phone numbers. The second page shows more detailed information about this contact, such as personal information that might be useful for a phone conversation. The third page shows a detailed history of communications with this contact. Each view may have up to 999 pages.

To move among contact views, pages, and records, you will use one of the TeleMagic Contact Manager Toolbars. When you first open the Contact Manager, the Primary Contact Manager Toolbar looks like this:




**Primary Contact Manager Toolbar (not in Edit mode)**

As soon as you click the Edit button , or click on any field on the record you are viewing, you are in edit mode. While in edit mode you can alter the current record, which is now locked. (No other users will be able to change it while it is locked.) The Edit button becomes a Save button . The toolbars are user-definable and dockable (they can be moved and resized). For information on configuring Contact Manager Toolbars, see the Toolbar Preferences topic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Changing_Levels_Views_and_Pages)<<1}
Changing Levels, Views, and Pages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Changing Levels, Views, and Pages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Each database is composed of one to three levels; each level is composed of one or more views; each view is composed of one or more pages. Once you have a database open, you may move through the levels, views, and pages to view all of the information contained in the database.

Changing Levels
Changing Views
Changing Pages

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Changing Levels

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

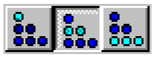
To Change Levels Using the Toolbar
To Change Levels Using the Keyboard:
To Change Levels Using Goto:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Changing_Views)<<1} Changing Views
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Changing_Pages)<<1} Changing Pages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Change Levels Using the Toolbar:

- Click the appropriate level selector button:



## To Change Levels Using the Keyboard:

- Press ALT plus the level number (ALT+1, ALT+2, or ALT+3).

# To Change Levels Using Goto:

1. From the Contact Manager Toolbar, click the Goto button:
   

   The Goto dialog box will open.

2. Select the level from the `Level` drop-down list.

3. Click **OK**.

   The selected level will open.

## Changing Views

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Manageri¿½ i¿½ i¿½ )<<1}

To Change Views from the Main Menu:
To Change Views Using Goto:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPi¿½CONTACT1_Changing_Levels)<<1} Changing Levels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPi¿½CONTACT1_Changing_Pages)<<1} Changing Pages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPi¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPi¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Change Views Using Goto:

1. From the Contact Manager Toolbar, click the Goto button:
   

   The Goto dialog box will open.

2. Select the view from the `View:` drop-down list.

3. Click **OK**.

   The selected view will open.

## To Change Views from the Main Menu:

1. From the **Contact Manager** menu, select **Views**.

   The Views sub-menu will open.

   This sub-menu will show all of the views for all levels of the database.

2. Select the view you would like to use.

# Changing Pages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

To Change Pages from the Main Menu:
To Change Pages from the Keyboard
To Change Pages Using Goto:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Changing_Levels)<<1} Changing Levels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Changing_Views)<<1} Changing Views
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Change Pages from the Main Menu:

1. From the **Contact Manager** menu, select **Pages**.

   The Pages sub-menu will open.

   This sub-menu will show all of the pages for the current level of the database.

   Select the page you would like to use.

## To Change Pages from the Keyboard:

- Press PAGE DOWN to move to the next page.

**or** Press PAGE UP to move to the previous page.

## To Change Pages Using Goto:

1. From the Contact Manager Toolbar, click the Goto button:
   

   The Goto dialog box will open.

2. Select the page from the `Page:` drop-down list.

# Viewing Contact Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

There are two ways of viewing contact information:

One record at a time, using contact view pages. Contact views lay out information for a single record in an easy-to-read format.

Multiple records at a time, using Browse. Browse displays all records in a scrollable table, and allows you to compare two records side-by-side.

With either method, you have the choice of viewing all records in the database, or only a select group of records using a filter. You can also control the order in which records appear by using an index. For example, you may want to view records in alphabetical order by company name. TeleMagic comes with a selection of filters and indexes in each of the sample databases.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Selecting_Filters_and_Indexes)<<1} Selecting Filters and Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Records_One_at_a_Time)<<1} Viewing Records One-at-a-Time

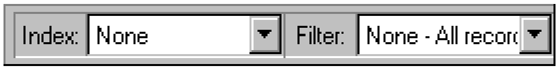
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_More_than_One_Record_at_a_Time_Browse_View)<<1} Viewing More than One Record at a Time (Browse View)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Selecting Filters and Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filters and Indexesï¿½ ï¿½ ï¿½ )<<1}

Filters and indexes are selected from the Contact Manager Toolbar:




**Index and Filter drop-down lists**

Since the Contact Manager Toolbar can be configured, your toolbar may not appear exactly as in the illustration. You may have elected not to include one or both of these drop-down lists in your configuration. You can also select filters and indexes from the Contact Manager menu.

To Set an Index:
To Set a Filter:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Filters)<<1} Creating Filters
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Set an Index:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filters and Indexesï¿½ ï¿½ ï¿½ )<<1}

1. If you have not already done so, open the Contact Manager and choose the level you want to view.

   **Example:** Company

2. On the Contact Manager Toolbar, click on the `Index:` drop-down list.

   The available index list will appear.

3. Use the scroll bar as necessary and select the order in which you want to sort records.

   **Example:** Company Name

4. Look through your records. They will appear sorted in the order you selected.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Set_a_Filter)<<1} To Set a Filter:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records

## To Set a Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filters and Indexesï¿½ ï¿½ ï¿½ )<<1}

1. If you have not already done so, open the Contact Manager and choose the level you want to view.

   **Example:** Company

2. On the Contact Manager Toolbar, click the `Filter:` drop-down list.

   The available filter list will drop down.

3. Use the scroll bar as necessary and select the records with which you want to work.

   **Example:** EC Companies.

4. Look through your records.

   Using the example above in the Documentation database, you will see only records for European Community companies.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Set_an_Index)<<1} To Set an Index:

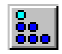
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Filters)<<1} Creating Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records

# Viewing Records One at a Time

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

## To See All Views and Pages for a Single Record:

1. To view Level 1, click the Level 1 control: 

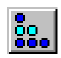
**or** Press ALT+1.

The current level will close, and the Level 1 view will open.

2. To move to the next page on Level 1, press PAGE DOWN.

3. Continue to page down until you have viewed all pages in the view and return to the first page of this level.

**or** To view the previous page of this level, press PAGE UP.

4. To view Level 2, click the Level 2 control: 

**or** Press ALT+2.

The current level will close, and the first page of the Level 2 view will open.

5. Page up and down to view all pages of this level.

6. To view Level 3, click the Level 3 control: 

**or** Press ALT+3.

The current level will close, and the Level 3 view will open.

7. Page up and down to view all pages of this level.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Selecting_Filters_and_Indexes)<<1} Selecting Filters and Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Scroll_Through_Records_on_Any_Page_of_Any_Contact_View)<<1} To Scroll Through Records on Any Page of Any View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_View_Records_for_the_Current_Parent_Only)<<1} To View Records for the Current Parent Only:

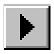
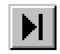
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_More_than_One_Record_at_a_Time_Browse_View)<<1} Viewing More than One Record at a Time (Browse View)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Scroll Through Records on Any Page of Any Contact View:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. To move forward one record, click the Forward control:
    or press ALT+RIGHT ARROW key.
2. To move to the last record, click the End control: 
   or press ALT+END.
3. To move back one record, click the Reverse control:
    or press ALT+LEFT ARROW key.
4. To move to the first record, click the Beginning control:
    or press ALT+HOME.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Selecting_Filters_and_Indexes)<<1} Selecting Filters and Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Records_One_at_a_Time)<<1} Viewing Records One-at-a-Time

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_View_Records_for_the_Current_Parent_Only)<<1} To View Records for the Current Parent Only:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_More_than_One_Record_at_a_Time_Browse_View)<<1} Viewing More than One Record at a Time (Browse View)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To View Records for the Current Parent Only:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

When viewing your records, you may want only to view records attached to the current parent. The current parent is the parent of the record you are currently viewing. For example, in the Documentation database, if you are viewing the Level 2 record for Antoine Paulus, the current parent is Agence Montemarte. If you were viewing records for the current parent on Level 2, you would see records for Antoine Paulus and Mouki Du Bois.

1. Open any Level 2 or Level 3 record.
2. From the **Contact Manager** menu, select:
   - **See Only Level 2 Records For Current Level 1** if you are on Level 2. This will cause only records that share the same Level 1 parent with the current record to be displayed in the Contact Manager.
   - **See Only Level 3 Records For Current Level 2** if you are on Level 3. This will cause only records that share the same Level 2 parent with the current record to be displayed in the Contact Manager.

   A check will appear on the menu beside the selected option.
3. Scroll through the records. Records not related to the same parent record will not be displayed.
4. To view all records again, from the **Contact Manager** menu, select ü**See Only Level 2 Records For Current Level 1** or ü**See Only Level 3 Records For Current Level 2**.

   The check mark will disappear from the menu. All records will be available for viewing.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Selecting_Filters_and_Indexes)<<1} Selecting Filters and Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Scroll_Through_Records_on_Any_Page_of_Any_Contact_View)<<1} To Scroll Through Records on Any Page of Any View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Records_One_at_a_Time)<<1} Viewing Records One-at-a-Time

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_More_than_One_Record_at_a_Time_Browse_View)<<1} Viewing More than One Record at a Time (Browse View)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Viewing More than One Record at a Time (Browse View)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Browse view displays all of your records in the current filter in a table. This allows you to view multiple records simultaneously, and even compare any two records in your filters side-by-side.

To Access Browse View, Method 1:
To Access Browse View, Method 2:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Move_a_Field_in_Browse_View)<<1} To Move a Field in Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Exit_Browse_View)<<1} To Exit Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Access Browse View, Method 1:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Manageri¿½ ï¿½ ï¿½ )<<1}

1. Open the view for the level you want to browse.
2. Choose a filter and index for the records you want to browse, if desired.

**WARNING!**
If you have more than 30,000 records in your database, do not apply a filter before using browse view. If you do, you will encounter significant delays while TeleMagic applies the filter.

3. From the **Contact Manager** menu, select **Browse**.

**or** Click the Browse button on the System Toolbar:

**or** From the Contact Manager Toolbar, click the Goto button to open the Goto dialog box, then click **Contact Browse**.

The Browse window will open.

The name of each field in the level you selected will appear at the top of the Browse window. The corresponding data for each record will appear in column form beneath each field name.

4. Use the scroll bars at the bottom and right of the Browse window to scan across records and down field columns.
5. If you want to go to a record, highlight it and click **Select** or press ENTER. Browse will close and the record will be displayed.

**or** To exit Browse and return to the current record, click the **Close** button or press ESC.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Access_Browse_View_Method_2)<<1} To Access Browse View, Method 2:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Move_a_Field_in_Browse_View)<<1} To Move a Field in Browse View:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Exit_Browse_View)<<1} To Exit Browse View:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Access Browse View, Method 2:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Manageri¿½ ï¿½ ï¿½ )<<1}

1. If the Contact Manager is closed, click the Browse button on the System Toolbar: •

   The Select a Level to Browse dialog box will open.

2. Click the button corresponding to the level you want to browse.

   The Browse index and filter selection box will open.

3. If you want to view all records in the order in which they were added, leave the default `None` selections.

**or** Choose a filter and index from the drop-down lists.

**WARNING!**
If you have more than 30,000 records in your database, do not apply a filter before using browse view. If you do, you will encounter significant delays while TeleMagic applies the filter.

4. Click **OK**.

   The Browse window will open.

•  The name of each field in the level you selected will appear at the top of the Browse window. The corresponding data for each record will appear in column form beneath each field name.

• 5. Use the scroll bars at the bottom and the right of the Browse window to scan across records and down field columns.

6. If you want to go to a record, highlight it and click **Select** or press ENTER. Browse will close and the Contact Manager will open to that record.

**or** To exit Browse without selecting a record, click the **Close** button or press ESC.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Access_Browse_View_Method_1)<<1} To Access Browse View, Method 1:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Move_a_Field_in_Browse_View)<<1} To Move a Field in Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Exit_Browse_View)<<1} To Exit Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Move a Field in Browse View:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Switch to Browse view if you have not done so already. (See To Access Browse View, Method 1: or To Access Browse View, Method 2 for instructions.)
2. Click the name of the field.
3. Drag the field to its new location and drop it.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Exit_Browse_View)<<1} To Exit Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Exit Browse View:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

- Click the **Close** button or press ESC.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Adding Contact Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Before adding new records, you should be familiar with database structure and moving among database levels. Review Viewing Contact Records if you are unclear on navigating the Contact Manager.

**WARNING!**
Do not try to add records without sufficient storage space to save those records. If you try to save without sufficient space, severe damage or loss of data in *all* records can occur. You will need approximately .6 KB per record without OLE data. If you have OLE data, each object will require from 3.4 KB to 1.5 MB, depending upon object type.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_To_Add_a_Level_1_Record)<<1} To Add a Level 1 Record:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½CONTACT2_Adding_to_Multiple_Levels)<<1} Adding to Multiple Levels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_Records_By_Copying)<<1} Adding Records By Copying

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Change Pages from the Keyboard

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

- Press PAGE UP or PAGE DOWN to move through the pages.

## To Add a Level 1 Record:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Recordsï¿½ ï¿½ ï¿½ )<<1}

1. If you have not already done so, select a view from the **Contact Manager** menu.

2. From the Contact Manager Toolbar, click the Add button:
   

   If there is only one level in the database, a blank record will appear. Skip to step 4. If there are multiple levels in the database, the Add Record dialog box will appear. The top three buttons in this dialog box allow you to add records to Level 1, Level 2, and Level 3, respectively, using the names you have given to the database levels.

3. Choose **Add [Level 1] record…**.

**or** If Level 1 is the current level, choose **Quick Add**.

   A blank Level 1 (Company) record will appear.

4. Fill in the blank record. For instructions on how to enter data into a field, see Entering and Editing Data.

5. If your record has multiple pages, use PAGE UP or PAGE DOWN to fill in the next or previous page.

6. To save the new record, click the Save button ( ● ) on the Contact Manager Toolbar.

   To return to the Contact Manager without saving the new record, press ESC or click the **Cancel** button in the dialog box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½CONTACT2_Adding_to_Multiple_Levels)<<1} Adding to Multiple Levels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_Records_By_Copying)<<1} Adding Records By Copying
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Quick_Add)<<1} Quick Add
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Adding to Multiple Levels

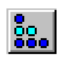
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Recordsï¿½ ï¿½ ï¿½ )<<1}

There are occasions when you will need to add to two or more database levels at a time. For example, in the Documentation database, when you make a contact with a new company, you may need to create a record for both the company and the contact, and possibly even need to enter sales contract information as well. Rather than having to add each record separately, you can add to all three levels at the same time.

## To Add to Multiple Levels:

1. Open the **Contact Manager** menu. Make sure there is a check mark preceding the **See Only Level 2 Records for Current Level 1** and **See Only Level 3 Records for Current Level 2**.

2. Follow instruction steps 1 through 4 under To Add a Level 1 Record to add the Level 1 record.

3. Click the Level 2 selector: 

   A message will appear asking if you want to save the changes to Level 1.

4. Click **Yes**.

   A new, blank Level 2 record will appear with the cursor in the first field.

5. Fill in the Level 2 information, then click the Level 3 selector:

   A message will appear asking if you want to save the changes to Level 2.

6. Click **Yes**.

   A new, blank Level 3 record will appear with the cursor in the first field.

7. Fill in the Level 3 record and click **Save**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT2_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_Records_By_Copying)<<1} Adding Records By Copying

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Quick Add

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Recordsï¿½ ï¿½ ï¿½ )<<1}

Quick add allows you to bypass the Add Record dialog box by adding a record to the current level and parent. If the record you are currently viewing is on the level you want to add to, and if you are on Level 2 or 3 and is also attached to the correct parent, you can use the quick add feature.

## To Quickly Add a Record:

- From the **Current Record** menu, select **Quick Add**.

**or** On the keyboard, press CTRL+Q.

A new record will appear. The record will be for the current level and, if you are on Level 2 or 3, the current parent. (See Entering and Editing Data for instructions on filling in the record.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_To_Add_a_Level_1_Record)<<1} To Add a Level 1 Record:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½CONTACT2_Adding_to_Multiple_Levels)<<1} Adding to Multiple Levels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_to_Multiple_Levels)<<1} Adding to Multiple Levels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_Records_By_Copying)<<1} Adding Records By Copying
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

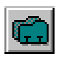
# Adding Records By Copying

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Recordsï¿½ ï¿½ ï¿½ )<<1}

Sometimes, to save yourself from entering the same or very similar information into two different records, you might choose to add a record by copying an existing record, instead of adding a new record from scratch.

## To Copy a Record:

1. Open the Contact Manager to the record you want to copy.

2. Click the Copy button on the Contact Manager Toolbar:


   A Record Copied message box will appear.

3. Click **OK**.

   You are now looking at a copy of the original record.

4. Edit the record if desired, then click the Save button on the Contact Manager Toolbar:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_To_Add_a_Level_1_Record)<<1} To Add a Level 1 Record:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½CONTACT2_Adding_to_Multiple_Levels)<<1} Adding to Multiple Levels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_to_Multiple_Levels)<<1} Adding to Multiple Levels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Entering and Editing Data

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

There are many different types of fields that you may encounter when working in TeleMagic. Most of these fields can be edited by simply placing your cursor in the field and using standard word processing commands. Other fields have been created to only contain specific data or specific types of data. (Specifying what a field can and cannot contain is called "creating a template" for the field.) Still other fields are automatically filled in based on the data from other fields, or even from other areas of TeleMagic. Before entering data into your fields, it is a good idea to familiarize yourself with the fields in your database and exactly what information they are designed to contain.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_If_You_Can_t_Type_in_a_Field)<<1} If You Can't Type in a Field

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Selecting_Changing_Copying_and_Deleting_Text)<<1} Selecting, Changing, Copying, and Deleting Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Saving_Changes_Made_to_a_Record)<<1} Saving Changes Made to a Record

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Editing_Records_in_Browse_View)<<1} Editing Records in Browse View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Group_Replace)<<1} Group Replace

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Resetting_Unique_Numbers)<<1} Resetting Unique Numbers

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Field Types

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

To take advantage of the full power and versatility of TeleMagic, you should know exactly what kinds of information you can and cannot enter into the various fields in the Contact Manager screen.

Contact Manager fields are formatted from a template which has been designed to allow varying degrees of restriction on what you can and cannot enter into a field. Most fields are *character fields*. In these, you can enter letters, numbers, special characters (such as an * asterisk), and spaces. Although by default, a character field can contain any type of character, this freedom may be limited by the template created for the field. This is also true of the other field types.

**Phone fields** are designed to contain phone numbers. Phone fields are preceded by a phone icon: ( ) -
that can be used with the TeleMagic Dialer feature. Phone fields are usually formatted through a template to display the phone number properly. The exact template was determined when the field was initially created, and can be edited if necessary. Since telephone numbering formats vary in different countries and areas, TeleMagic phone fields have no default template.

Phone numbers are not necessarily restricted to numerical data, although this depends on the template used. If your field can contain letters, be aware that TeleMagic can translate the letters on a telephone keypad to the corresponding numbers. However, the letters *must* be capitalized. For instance, you could enter 1-800-835-MAGIC in a phone field. When you dial that number using the Dialer, TeleMagic will correctly dial the numeric equivalent, or 1-800-835-6244.

Lower case (non-capitalized) letters in a phone field will be ignored. This is useful if you want to include additional description of the number for the user's benefit, but which won't interfere with the dialing process. For example, the telephone number 1-800-555-9213ext772 will dial the 800 number and the extension 772, but will not translate "ext" into the corresponding keypad numbers.

Keep in mind that if you do enter an extension in a phone field, you should use commas to instruct TeleMagic to wait 2 seconds (per comma) before dialing the extension. For example -- 1-800-555-9213**,**ext772.

**Date fields** can only contain actual dates. If you try to enter a date that TeleMagic does not recognize, such as 44/78/89, you will not be able to move on to the next field, and you will be returned to the beginning of the date field to correct the entry. Pressing the key or the **-** key in an empty date field in the Contact Manager will enter the current date; pressing the key or the **-** key in a date field with a current entry will move the day counter up or down by one day. When a date field is added to the contact page, it may have been set up to display a Date Picker icon: Clicking this icon will allow you to quickly access a Go To Date dialog box. This dialog box can be used to select dates to enter into the field from a calendar.

If your field does not have a Date Picker icon and you want to enter the date using the Go To Date dialog box, you can set your Display preferences to display the calendar when you press F2 or click the right mouse button in the field. (For more information on setting up Display preferences, see the List Box on Date Fields topic.)

To use dates beyond the year 2000 in the abbreviated form (00, 01, etc.) in TeleMagic date fields, you must enter the date using the Go To Date dialog box. If you type a number such as "00" or

"01" manually, TeleMagic will assume you mean 1900 and 1901, respectively. TeleMagic has been configured to comply with all Year 2000 issues.

Date fields can be designed in a template to use either U.S. date format (MM-DD-YY) or the format used in most of the rest of the world (DD-MM-YY).

**Numeric fields** are useful if you want to keep track of real numbers. You will not be able to type letters into a numeric field. They can only contain numbers, and may formatted in the template to contain decimals, signs (such as or -), and spaces.

**Memo fields** are text fields which allow you to enter any amount of information. You can enter letters, numbers, special characters, and spaces into a memo field. A **notepad** is a special kind of memo field.

**Rollup Lists** are special fields designed to list information relating to a record. You can have rollups of activities linked to a contact (Activity History field), child (or grandchild) records related to a record (Contact Rollup), or linked word processing documents (Document Rollup). Data in these fields are filled in automatically and cannot be edited.

**Calculated and Default Value** fields will fill in automatically based on the entry in other fields. A calculated field cannot be edited. Default value fields will offer a suggested entry (a default) that can be changed if necessary.

**Activity fields** are special fields designed to contain information about activities linked to the current record. They generally look like this: .
The prompt usually explains the contents of these fields. These fields fill in automatically based on information from the Activity Manager; they cannot be edited manually.

**Start and Last Revision fields** are used to track when a record was created and when it was last changed. They also track who added and who last edited the record. These fields are not always shown in a contact view, but they can be displayed in a browse window. They cannot be edited.

**The RCL (or Recall)** field is used to create a *contact-based recall* (as opposed to an *activity-based recall*). Rather than scheduling an activity in the Activity Manger for a recall, the RCL field allows you to store the next recall date and time directly in the Contact Manager. The RCL field is unique in that it can contain both a date and time.

**The LCL** field contains information about the last call type activity for a contact. It is filled in automatically based on a completed call made through the Dialer feature. Data in the field cannot be edited.

**OLE** fields hold pictures, sounds, charts, graphs, animation, and other objects created in other programs. You can edit these objects only by using the programs originally used to create them.

**Unique Number** fields are designed to contain an automatically generated unique number. For example, you may have a page designed to create an invoice. A unique number field may be used to generate the invoice numbers. These fields cannot be edited manually.

## Restrictions

You may encounter two kinds of restrictions while entering data: *literal* (also known as mask) characters, and *formatting* characters.

Literal characters are built-in characters; you cannot change them. A good example of this are the area code parentheses in most phone fields. These are literal characters; no other characters can be entered in the space occupied by the literal.

Formatting characters do not appear in the field. They stand in for characters you can enter in the field. They tell TeleMagic what types of data those spaces in the field can accept. For example, you may always want the first character in a name field to be a capital letter. A formatting character in the first space in the field's template would control this.

Fields can also be categorized as *validated* or not validated. *Validated* fields are fields that have been set up to only accept certain information. If you try to make a non-valid entry in a validated field, you will be informed of this fact and be forced to fix the data. For example, if you had a field in a view that noted the birthdate of a contact, this date would have to be in the past. You would not be allowed to enter a future date.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_If_You_Can_t_Type_in_a_Field)<<1} If You Can't Type in a Field

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Adding_Fields_to_a_Contact_Database)<<1} Adding Fields to a Contact Database

# If You Can't Type in a Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

You may become “stuck” because you cannot seem to enter or edit data in certain fields. You cannot enter data directly into certain *kinds of* fields, including unique number, calculated, and activity fields. In other fields, such as phone and number fields, you may find that you cannot edit data already entered for you.

TeleMagic calculates unique numbers (such as Contact ID numbers) based upon templates established for each unique number field. You cannot change these numbers.

The program enters data directly into calculated fields based upon the calculation expression for that field. Calculated field entries cannot be changed except by changing the underlying data, or by changing the calculation expression.

You cannot edit fields which “pull” data from other contact levels, except by editing the “child” field in which the data was originally entered. You cannot edit fields based on data from the Activity Manager.

You cannot remove currency or percentage signs from fields formatted to display these unless you change the format or template. Nor can you remove characters such as parentheses or dashes from another field (such as phone fields) that have been set up with templates, without changing that template.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Entering Data in Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

Most of the data you enter into a record will be alphanumeric text typed into character, number, and phone fields. You type text into these Contact Manager fields just as you would into any other Windows text field. The basic keys you use with most word processors (such as CAPS LOCK, BACKSPACE, SPACEBAR, INSERT, DELETE, HOME, END, LEFT ARROW and RIGHT ARROW keys) function within these text fields much as they do on a word-processor page.

Text fonts and colors are defined for each data field using the Screen Designer. These colors and fonts will apply to all records. You cannot change them for individual records.

To Enter Text:
To Move the Cursor Within a Text Field:
To Move Between Fields:
Using an RCL Field for Recalls

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

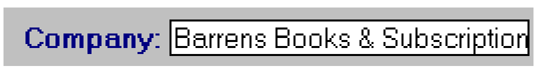
# To Enter Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click in a field. If the field is empty and not selected, the cursor will snap to the beginning of the field. (If there is data in the field already, the cursor will remain exactly where you clicked.)

2. Type your data using standard word processing commands. (See To Move the Cursor Within a Text Field: if you are unclear on standard word processing commands.)

   If the actual length of the field is greater than the number of characters displayed on the screen, the field will scroll to the left as the display area fills:




**Text Field, With Scrolled Text**


**Text Field, With Scrolled Text**

   In memo fields, text will wrap to fit the display area width. When the display area is full, the field will scroll downward:


**Memo Field, With Wrapped Text;**
**Use Scroll Buttons to Reveal More Data:**


3. When complete, move the cursor to the next field. (Press CTRL+TAB if you are typing in a Memo field.)

4. Repeat steps 1 through 3 for each field until you have

entered all data into the record.

5. To save the data, click the Save button:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Move the Cursor Within a Text Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

- To move one character, press RIGHT ARROW or LEFT ARROW.
- To move to the next word, press CTRL+RIGHT ARROW or CTRL+LEFT arrow.
- To move to the next part (past parentheses, dashes, etc.) of a templated field (such as a phone field), use the RIGHT ARROW or LEFT ARROW.
- To move to the beginning of a line, press HOME.
- To move to the end of a line, press END.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Move Between Fields:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

- Click anywhere in the new field.

  If the field is empty, the cursor will snap to the beginning of the field. (If there is data in the field already, the cursor will remain exactly where you clicked.)

- Press TAB.

  The cursor will jump to the beginning of the next field in edit order. If there is no data in the field, the entire field will be highlighted.

- Press SHIFT+TAB.

  The cursor will jump to the beginning of the previous field in edit order.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Working with Memo Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

You will find that you have many pieces of information to track for every contact . When was the last time you called this contact? What was discussed? Who was the previous head of this department and why did he or she leave the company? Why was the company given a discount on their last order? Having easy access to this sort of miscellaneous information can be vital when dealing with contacts.

Memo fields allow you to store notes related to your contacts. Additionally, TeleMagic uses the Notepad, a special memo field defined in Contact Key Fields, to track information about your dealings with contacts such as calls made through the dialer, or faxes sent through the faxing system. (See the topic Key Field Preferences for information on setting up your Contact Key Fields.)

You have the option of displaying any memo field on the database's contact screen, or accessing a memo field through buttons on the Contact Manager Toolbar. There are three ways of adding data to a memo field:

- If the field is displayed on the current contact page, you can add and edit data directly in the memo field.

- If you would like to add a quick note that will be appended to a selected memo field, you can use the Add Note button (
) on the Contact Manager Toolbar.

- If you would like to bring up a memo field from any page of the database (the current level or higher) for review, editing, or adding additional notes, you can use the Notepad button (
) on the Contact Manager Toolbar.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Working with an On-screen Memo Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

Most databases will display memo fields directly on the contact screen. For example, page 1 on Level 2 of the Documentation database contains a memo field called `Notes:` in the middle of the left side.

To View Notes in a Memo Field
To Add a Note to a Memo Field
To Edit Existing Notes
To Import a Text File into a Memo Field
To Export the Contents of a Memo Field to a File

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To View Notes in a Memo Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

- If there is more data in the memo field than can be displayed in the allotted window, use the scroll arrows at the side of the field to scroll through the fields line by line.
- To move quickly through the memo field, place your cursor in the memo field and use the PAGE UP and PAGE DOWN keys. (Do not use the page up  and page down  buttons if they have been placed on the toolbar. These buttons will move you to the next page of the view.)

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Add a Note to a Memo Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click in the memo field.
2. Press ALT+N.

   The memo field will be stamped at the top with the date, time, and your User ID.
3. Type your note.
4. Click the Save button ( ● ) on the Contact Manager Toolbar to save the note.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Edit Existing Notes:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Place your cursor anywhere in the body of the memo field.
2. Use standard word processing commands to edit the text.
3. Press CTRL+TAB to exit the memo field and move to the next field in edit order.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Import a Text File into a Memo Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

You can add text from a text file to a memo field by importing. You must first have the text file (text files normally have a .TXT extension) stored in a directory that you can access.

1. Make the memo field that is to receive the text file the current field by clicking in it, or by tabbing to it.

2. From the **Edit** menu, select **Import Text**.

**or** Press ALT+I.

The Open dialog box will open.

3. Browse for the text file to be imported.

4. Select the desired file. When the file name appears in the `File Name` field, click **OK**.

The contents of the file will be added to the end of the memo field.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Export the Contents of a Memo Field to a File:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Place your cursor in the memo field.
2. Press ALT+E.

**or** From the **Edit** menu, select **Export Text**.

A Save As dialog box will open.

3. Enter the path and file name for the file you want to create.
4. Click **Save**.

A file will be created containing the contents of the memo field.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Using the Contact Manager Toolbar's Add Note Button

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Hint_for_Add_Note_Button)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ ï¿½
)<<1}

You may want to quickly add a note to a memo field that is not displayed on the page you are currently viewing. Rather than having to step to the correct page, you can use the Add Note button to quickly create a note that will be appended to any memo field on the current level or higher.

## To Use the Add Note Button:

1. From the Contact Manager Toolbar, click the Add Note button: 

   The Add Note dialog box will open.

   The Add Note dialog box provides a text area for your note, pre-stamped with the date, time, and your User ID. The `Memo:` drop-down list at the bottom left of the dialog box provides a list of all of the memo fields on the current level and higher (the current contact's parent and grandparent records). The drop-down list will default to the Notepad field selected in Contact Key Fields for the current level.

2. If you would like to use a different memo field than the default Notepad, select it from the `Memo:` list.

3. Type your note as you want it to appear in the memo field.

4. Click **Save** to save your entry to the currently selected memo field.

**or** Select another memo field from the `Memo:` list.

   If you have made any changes to the current memo field, you will be asked if you want to save your current edits.

5. Click **Yes** to save your edits.

**or** Click **No** to change to the selected memo field without saving your edits.

6. Repeat steps 3 through 5 for each memo field to which you would like to add.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and

Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Using the Contact Manager Toolbar's Notepad Button

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Memo Fieldsï¿½ ï¿½ï¿½ )<<1}

The Notepad button on the Contact Manager Toolbar is similar to the Add Note button in that it allows you to access memo fields that are not necessarily on the current level or page, and even memo fields that exist in the database but have not been added to any page. Unlike the Add Note feature, the Notepad option gives you full access to view and edit existing notes in the memo fields, and it allows you to work with multiple memo fields in one session.

## To Use the Notepad Button:

1. Click the Notepad button on the Contact Manager Toolbar: 

   The Notepad dialog box will open.

   - The memo field being displayed will default to your Notepad (based on your Contact Key Fields selection for the current level).

   The `Memo:` drop-down list at the bottom left of the dialog box provides a list of all of the memo fields on the current level and higher (the current contact's parent and grandparent records).

- 2. If you do not want to work with the default Notepad field, select the memo field you would like to view from the `Memo:` drop-down list.

3. Edit the memo field using the following guidelines:
   To View Notes in a Memo Field
   To Add a Note to a Memo Field
   To Edit Existing Notes
   To Import a Text File into a Memo Field
   To Export the Contents of a Memo Field to a File

4. Click **Save** to save your edits to the currently selected memo field and exit the Notepad dialog box. You will be returned to the Contact Manager.

**or** Select another memo field from the `Memo:` list.

If you have made any changes to the current memo field, you will be asked if you would like to save your current edits.

5. Click **Yes** to save your edits.

**or** Click **No** to change to the selected memo field without saving your edits.

6. Repeat steps 3 through 5 for each memo field you want to view.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Working_with_Memo_Fields)<<1} Working with Memo Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Selecting, Changing, Copying, and Deleting Text

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

To edit, move, or copy text, you must first indicate which text you want to edit, move, or copy. With a mouse, you do this by painting; that is, by clicking at the beginning of the selection and dragging to highlight the selection. From the keyboard, you use a combination of SHIFT, CTRL, and ARROW keys to select (highlight) text.

To Select Text:
To Edit Text:
To Copy Text From One Field to Another:
To Move Text From One Field to Another:
To Delete Text:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Select Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

- To select one character, press SHIFT+RIGHT ARROW or SHIFT+LEFT ARROW.
- To select a word, place the cursor at the beginning of the word and press CTRL+SHIFT+RIGHT or CTRL+SHIFT+LEFT ARROW.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Selecting_Changing_Copying_and_Deleting_Text)<<1} Selecting, Changing, Copying, and Deleting Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Edit Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

- To add text to existing data, position the cursor, and type the new data.
- To replace all or part of a field entry, select the text to change, then type the new data. The data you type will replace the selected text.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Selecting_Changing_Copying_and_Deleting_Text)<<1} Selecting, Changing, Copying, and Deleting Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Copy Text From One Field to Another:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

1. Select the text you want to copy.
2. Press CTRL+C, or select **Copy** from the **Edit** menu.
3. Move the cursor to the new position.
4. Press CTRL+V, or select **Paste** from the **Edit** menu.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Selecting_Changing_Copying_and_Deleting_Text)<<1} Selecting, Changing, Copying, and Deleting Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Move Text From One Field to Another:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

1. Select the text you want to move.
2. Press CTRL+X, or select **Cut** from the **Edit** menu.
3. Move the cursor to the new position.
4. Press CTRL+V, or select **Paste** from the **Edit** menu.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Selecting_Changing_Copying_and_Deleting_Text)<<1} Selecting, Changing, Copying, and Deleting Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Delete Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

1. Select the text to be deleted.
2. Press DELETE or BACKSPACE.

**WARNING!**

Do not click the Delete button ( ● ) on the Contact Manager Toolbar. The Delete button will delete the entire record, not just the data you have selected.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Selecting_Changing_Copying_and_Deleting_Text)<<1} Selecting, Changing, Copying, and Deleting Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Saving Changes Made to a Record

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

## To Save Changes Made to a Record:

- From the Contact Manager Toolbar, click the Save button: ●

  The Save button will change back to Edit ( ● ), taking you out of edit mode.

  The record is now unlocked and you are free to move on to other records.

- Press PAGE UP or PAGE DOWN or move to another level.

  A message will appear giving you the option of saving changes to the record. Click **Yes** to save the changes.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Editing Records in Browse View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

## To Edit in Browse View:

1. Switch to Browse view if you have not done so already. (See To Access Browse View, Method 1: or To Access Browse View, Method 2 for instructions.)

2. With the mouse, place the cursor anywhere in the field you want to edit. The selected field will be outlined.

3. Press SPACEBAR. The Browse Edit dialog box will open showing the data currently in the field.

4. Edit, delete, or enter text in the dialog box as necessary.

5. Click **OK** to save changes and return to Browse view.

**or** Click **Cancel** to return to Browse view without saving changes.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_More_than_One_Record_at_a_Time_Browse_View)<<1} Viewing More than One Record at a Time (Browse View)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Using an RCL Field for Recalls

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Fieldsï¿½ ï¿½ ï¿½ )<<1}

Recalls are reminders that a contact needs a phone call at a given date and time. There are two types of recalls: activity-based and contact-based. Activity-based recalls are call type activities scheduled on a user's calendar. These activities are owned and will be completed by that user. (For information on activity recalls, see the To Set a Single Recall: topic.) Contact-based recalls use the RCL field. This is a special field that contains the date and time right on the contact page. These recalls are accessible to everyone.

If your database does not already contain an RCL field, see the topic Special Database Fields: Recall Field (RCL) for details on adding one.

When you are working with the RCL field, you can save time by using the following shortcut entries in the field:

**+/- Keys** Tapping the +/- keys will increase or decrease the recall date by one day per keypress. Holding down the +/- keys will repeat these actions continuously over several days.

**Minutes** Enter a number and "M" to set the time for a specified number of minutes from the current time. You may schedule from 1 to 999 minutes using M.

**Example** To schedule a return call 30 minutes from now:

Type: 30M and press ENTER

**Hours** Enter a number and "H" to set the time for a specified number of hours from the current time. You may schedule from 1 to 999 hours using H.

**Example** To schedule a return call 2 hours from now:

Type: 2H and press ENTER

**Days** Enter a number and "D" to set the date for a specified number of days from the current date. You may schedule from 1 to 999 days using D.

**Example** To schedule a return call 2 days from now:

Type: 2D and press ENTER

**Weeks** Enter a number and "W" to set the date for a specified number of weeks from the current date. You may schedule from 1 to 999 weeks using W.

**Example** To schedule a return call 2 weeks from now:

Type: 2W and press ENTER

**Months** There is no direct shortcut for months. If you want to set the RCL field for 1 month from now, either use 30D or 31D (depending on the number of days in the month).

**Years** Enter a number and "Y" to set the date for a specified number of years from the current date.

**Example** To schedule a return call 2 years from now:

Type 2Y and press ENTER

**WARNING!**

The RCL field ignores which days are weekends and holidays. For example, if you set a recall on a Saturday, you will get no warning message as you would if you were setting an activity-based recall.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Set_Multiple_Contact_Based_Recalls)<<1} To Set Multiple Contact Based Recalls:

# Group Replace

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Data Entryï¿½ ï¿½ ï¿½ )<<1}

At times you will need to edit the same data for more than one record. For example, one ZIP Code Area may be divided into several ZIP Code Areas, requiring you to change the ZIP Code for an entire group of records; or, a new account representative may take over a territory, making it necessary to update an Account Rep field.

If you will be replacing data in a select group of records only, you must create a filter to define those records before proceeding. For help in creating filters, see: Creating Filters

## To Edit the Same Data Field for More Than One Record:

In the following example, in the Documentation database, we will transfer all the California accounts from Account Representative KMK to Account Representative LMC.

1. Display any record showing the field you want to group edit.
2. From the **Contact Manager** menu, select **Contact Utilities**, **Group Replace**.

   The Select a Level for Replace dialog box will open.
3. Choose the control button for the database level containing the field you want to use for the group replace. (Normally, you will choose the level you are currently viewing.)

   **Example:** Contact.

   The Group Replace dialog box will open.
4. Select the field you want to edit, then click **Add**.

   **Example:** Account Rep {Acctrep}.

   The Replace Expression dialog box will open.
5. Type the new data for the field you selected, then click **OK**.

   **Example:** LMC.

   The field name will appear in the right-hand group replace list of the Group Replace dialog box.
6. From the `Filter:` drop-down list, select the group of records to replace.

   **Example:** Records in California.
7. Choose a `Replace Mode:`

- To quickly replace data for all records in the current filter, leave the `Replace Mode:` radio button at the `Fast` default setting and make sure that you have *exclusive use* of that database (i.e., that no other user is editing records in the database.)
- `Multi-User` will allow you to start a group replace without exclusive use of the database, but it will skip any locked records it encounters, leaving the replace incomplete. It will also take longer than `Fast` mode.

8. Click **Replace**.

   If there are no users in edit mode in the specified filter during the replace, TeleMagic will display the status as it updates the records. When TeleMagic completes the group edit, it will display the contact page. The new data will appear in all records in the specified filter.

**or** If there is another user in edit mode on a record when the replace is performed one of two things will happen:

- If you selected `Fast` in step 7, a message will appear informing you that TeleMagic is unable to lock a record and giving you the opportunity to retry or cancel. If you can locate the user who has locked the record and remove him or her from edit mode, do so, then select **Retry**; or, if you would like to abort, select **Cancel**.

If you select **Cancel** you will be given the opportunity to continue with the replace in multi-user mode. Click **Yes** to continue or **No** to abort and exit the Group Replace dialog box.

- If you selected `Multi-User` in step 7, the replace will begin. TeleMagic will display the status as it updates the records. When the group replace is completed, a dialog box will open listing the record descriptor for any records that were skipped.

If you want to tag the records, select the `Tag` check box. (This will allow you to repeat the group replace using the Tagged Records filter. Only select this if you do not already have tagged records in the database.) If you want a printout of the records that were skipped, select the `Print` check box. Click **OK** when you have finished viewing the list of records.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Resetting Unique Numbers

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Unique Number Fieldsï¿½ ï¿½ ï¿½ )<<1}

Unique number fields are fields that have been specially formatted to count records automatically. Invoice numbers, file numbers, case numbers, and check numbers are just a few examples of where you may want to use a unique number field. Unique numbers are generated automatically for each new record that is added to the database.

Resetting a unique number removes the existing numbers from the field for all records in a database, recalculates, and repopulates the field. If you have deleted records from your database, this procedure will remove any gaps in the numbering. If you have added a new unique number field to a database with existing contact records, resetting will apply the unique number to the existing records. Resetting unique numbers is available to supervisor users only.

## To Reset Unique Numbers:

1. Make sure all other users are out of the database you want to reset.
2. From the **Contact Manager** menu, select **Contact Utilities**, **Reset Unique Numbers**.

   The Reset Unique Number Fields dialog box will open.

   You have the ability to reset up to five unique number fields at a time. (If you do not have five unique number fields on the database level, the excess drop-down lists will be unavailable.)
3. From the `Contact Level` radio buttons, select the level containing the unique number(s) you want to reset.

   Unique numbers can consist of literal information that will not vary, site information that will only change if the installation's System ID changes, date information, and a counter portion. When resetting unique numbers, you are able to reset the counter portion to a starting point you specify, and have the option of resetting the date information to the current date.
4. If you would like to reset the counter portion only, select the `Counter portion` radio button. The unique numbers for existing records will continue to contain the date information from the date on which the record was added. If the System ID has changed since a record was added, the original System ID will be displayed in fields that contain this information.

   **or** If you want to reset the entire field, select the `Entire field` radio button. Any dates contained in the field will be updated to the current date and System ID information will reflect any changes.
5. From the `Unique Number Field` lists, select the

field(s) you would like to reset.

6. From the `Starting Number` fields, select the number with which you would like the counter portion of the unique number to begin.

• **Example:** If your unique number template starts with
• CONTRACT, then allots 5 characters for the counter portion of the unique number field, setting the starting number at 500 would cause the field in the first record in the database to be reset to CONTRACT00500, the next to CONTRACT00501, and so on.

7. When you have selected all of the fields you would like to reset, click **Reset Numbers**.

   A status bar will appear as the records are reset.

   When all records have been reset, you will be returned to the Contact Manager.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Unique_Number_Fields)<<1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Adding Data Using List Boxes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

Creating, Adding To and Selecting From List Boxes
Advanced List Box Configuration Options

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Creating, Adding To and Selecting From List Boxes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

You will have many recurring entries for specific data fields. To save typing time and to ensure correct and consistent spelling, you may want to add list boxes (where you can choose items from a list ) and connect them to specific fields on your contact screens. Most fields in TeleMagic dialog boxes can also have list boxes attached. List boxes contain lists of possible entries for a particular field. You can add entries to and choose entries from list boxes as needed. You can even designate fields that *require* users to make choices from a list, in order to standardize data entry. You may designate any list box as being available for editing only by supervisors.

List boxes are always accessed by pressing F2 or clicking the right mouse button.

To Enter Data Using a List Box
To Add a List Box (Pick List):
To Complete Multiple Fields with One List Box Item:
To Change a List Box Item:
To Delete a List Box Item:
To Remove a List Box from a Field:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Enter Data Using a List Box:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

1. Place your cursor in the desired field.
2. Press F2.

   The list box will appear. (If a list box does not appear, see To Add a List Box (Pick List): for instructions on creating one.)
3. Highlight the desired item on the list.
4. Click **Select**.

   The list box will close. The list box item will be entered in the field.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Add a List Box (Pick List):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

1. Click in the field for which you want to create a list box then press F2.

- If no list box exists for the field, a message will appear asking if you want to create one.

2. Click **Yes** or press ENTER.

- A List Box Configuration dialog box will appear:

3. Type the new list box title. Usually, you would make this title the same as, or similar to, the field name for which you are creating the list box. If you do not type a title, the field prompt will be the default title. (If you are using 800x600 screen resolution, be aware that if you enter a title of the maximum allowable length, the title will not fully display if the list box is accessed in 640x480 screen resolution.)

- **Example:** Region

4. Click **OK**.

   A blank list box will appear with the title you just entered.

5. Click **Add**.

   The Add Items dialog box will appear.

6. In the `Item:` field, type your list box item as you want it to appear when used to fill in your completed data field. (Your entry may be up to 252 characters in length.)

7. Enter a comment in the `Description:` field if the item description alone will not be self-explanatory. (This will appear in the list box, but will not be placed in the field by the list box.)

8. When satisfied with your item, click **OK**.

   The screen will return to the list box. Your new entry will be highlighted.

9. If you want to use the highlighted item, click select.

**or** Highlight the list box item you want to choose and click **Select**.

The list box will close, returning you to the data entry screen. The list box item you selected will appear in the field.

The next time you want to use this list box entry, or to add another entry to the list box, click anywhere in the corresponding field and then press F2. Your list box will appear listing all of the items that have previously been added to it.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Complete Multiple Fields with One List Box Item:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

Data in one field may be dependent on what is entered in another field. For example, if you enter Sacramento into a City field, you may always want to enter California in the State field. If you know what the entry in the previous field was based on, you can set up the list box to fill in both fields at once (as long as the fields are next to each other in entry order).

The examples below are based on the Documentation database.

1. In the Contact Manager, determine the entry order for the fields you want to fill in from the list box. To determine entry order, place your cursor in the first field and press TAB. Your cursor will appear in the next field in entry order. The fields must be sequential in entry order to use a multiple list box item. (Entry order may be edited in the Screen Designer. See Edit Input Order for details.

   **Example:** In Level 1 of the Documentation database, place your cursor in the `City:` field and press TAB twice. Your cursor will move to the `State:`, then the `Zip Code:` field.

2. Place your cursor in the first field.

   **Example:** `City`

3. Press F2 to access the list box for this field. (If a message appears stating that there is no list box for this field, refer to the instructions in the To Add a List Box (Pick List) topic.)

4. Click **Add**.

   The Add Item to List dialog box will open.

5. In the `Item:` field, enter each of the items you want to use to fill in the fields, separated by a semi-colon (;).

   **Example:** Tucson;AZ;85724

6. If necessary, enter a description of the item in the `Description:` field. (The description is for reference only and will not be entered into the field.)

7. Click **OK**.

   You will be returned to the list box.

8. Highlight the item and click **Select**.

   TeleMagic will take the text in the item up to the first semi-colon and fill it into the field to which the list box is attached. It will then move to the next field and fill it in with the text up to the next semi-colon, and so on.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Running a Macro from a List Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Hint_for_Running_a_Macro_from_a_List_Box)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

You can instruct TeleMagic to play out a macro from a list box. For example, you may want to enter data in a group of fields that are not in edit order, or you may want to save a record automatically and create a recall after the last field has been filled in for all new records. You can enter keyboard commands following a semi-colon in a list box.

**Example:** In the Documentation database, you may want to fill in the state and ZIP code automatically after filling in the city field. You could use the following list box item to accomplish this:

Tucson;AZ;85724

The only problem is that if you are in insert mode and subsequent fields already contain data, the state and ZIP code will be inserted at the beginning of the field, and the previously existing data will appear at the end of the field.

Using the following entry will solve this problem:

Tucson;{CTRL+Y}AZ{TAB}{CTRL+Y}85724

This will enter the city and move to the state field where CTRL+Y will erase any entry existing in this field. The new state will then be entered. TAB will move to the next field which will be cleared of any existing data before entering the ZIP code.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Complete_Multiple_Fields_with_One_List_Box_Item)<<1} To Complete Multiple Fields with One List Box Item:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Change a List Box Item:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

1. From the open list box, select the item you want to change.
2. Click **Change**.

   The Change Items dialog box will appear.
3. Make any changes, then click **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Delete a List Box Item:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

To delete all items from a list box at once, see the Deleting All List Box Items topic.

1. From the open list box, select the item you want to delete.
2. Click **Delete**.

   A message will appear asking you to confirm your decision to delete.
3. Click **Yes**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Remove_a_List_Box_from_a_Field)<<1} To Remove a List Box from a Field:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Remove a List Box from a Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

1. Access the field containing the list box you want to delete and press F2 to open the list box.
2. Delete all of the items in the list box following the instructions under Deleting All List Box Items.
3. At the empty list box, click **Delete**.

   A message will appear asking you to confirm your decision to delete.
4. Click **Yes** to delete the list box.

**or** Click **No** to retain the list box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Advanced List Box Configuration Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

When adding or changing a list box, you have a number of options, including whether the list box will pop up automatically; whether you want to allow multiple entries; whether items picked from the list will replace or be added to existing field contents; and how list box items are sorted.

You can also decide whether data typed into the field must match one of the list box entries (that is, whether TeleMagic validates the field).

## To Access the List Box Configuration Dialog Box:

The List Box Configuration dialog box always appears the first time you create a list box. Thereafter, you must follow these steps to recall it.

1. Click in the field for which you want to call up a list box, then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

Multiple Entries
Automatic Pop-up
Modified by Supervisor Only
Show List in Sorted Order
Display Description First
Use Wide List Display
Use List From Other Field
List Box Options

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1} Adding Data Using List Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Field Validation (Listbox)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Hint_for_List_Box_Validation)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

*Field Validation* means asking TeleMagic to verify that data you enter into a field match certain requirements. There are two types of field validation: by list and by expression. You may use these together or separately. Expression validation is set up using the Edit the Field List dialog box and becomes part of a field's properties. List validation is set up at the list box. (For more on expression validation, see the Field Expression Validation topic.)

To standardize data entry, you may want to *require* that choices be made from a list box. For example, you may routinely search the Documentation database for companies interested in certain categories of products. For the search to be effective, items entered in the `Categories of Interest:` field must be correctly named and spelled. Therefore, you should require that entries in the `Categories of Interest:` field exactly match choices in a corresponding list boxeven if you type them manually.

If you are validating a field from both a list box and an expression, the list box validation will be performed when you leave the field; the expression validation will be performed when you click **Save**. Even if the field entry is valid according to the list box, you will not be able to save the record if it conflicts with the validation expression.

### To Require that Field Entries Match List Box Entries:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Validate field contents from list` check box.

4. Click **OK**.

   Any data placed into the field from this point on must match one of the list box entries. If it does not, the list box will appear when the user tries to leave the field. The user can then either add the entry to the list box, or select from one of the valid entries. If the field has also been configured to require expression validation, an entry in the field must match both criteria to be acceptable.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1}
Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Multiple Entries

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

Some fields may have more than one valid entry at the same time. For example, on the Documentation database Contact Data screen, the `Categories of Interest:` field could contain several different categories of books which a retailer might stock. (For example, a school might have an interest in textbooks, reference, and classics.)

When multiple entries are entered into a data field, they are separated by a comma and added to the end of the field, regardless of the cursor's position.

### To Allow Multiple Entries in a Data Field:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Multiple valid entries allowed` check box.

4. Click **OK**.

### To Allow Single Entries Only in a Data Field:

By default, only one valid entry from a list box is allowed in a field.

1. Recall the List Box Configuration dialog box for the desired field. (See steps 1 and 2, above.)

2. Unmark the `Multiple valid entries allowed` check box.

3. Choose **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Automatic Pop-up

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

For some fields, you may want to have the list box appear automatically whenever the cursor is in that field. For example, if you have a `Title:` field before a contact's name, you may want to set an automatic pop-up list box to save yourself time and effort. That way, you can quickly pick options such as "Vice President" or "Director, Procurement" instead of manually typing them.

Any field for which you find that you routinely use a list box for data entry is a good candidate for an automatic pop-up.

If you insert an automatic pop-up list box in a field, it will appear *every single time* you move to that field, whether you need it or not.

### To Cause a List Box to Automatically Pop-up:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Automatically Launch list box` check box.

4. Click **OK**.

### To Require Manual List Box Recall:

1. Recall the List Box Configuration dialog box for the desired field. (See steps 1 and 2, above.)

2. Unmark the `Automatically Launch list box` check box.

3. Click **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1}
Advanced List Box Configuration Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Modified by Supervisor Only

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

In field-level security, there is an option to grant or deny access to a contact field's list box. If the field is not a contact field (such as a field in the Activity Manager or Sales Forecasting), you can control access using this check box.

This option will be unavailable if the list box is for a field on the contact page. Access to contact fields is controlled in Database Security.

## To Set Security on Non-Contact Field List Boxes:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark `Modified by supervisor only`. Non-supervisor users will be able to access and select items from the list box, but they will not be able to add or change list box items, nor access list box configuration.

**or** If you want non-supervisors to retain full access to this list box, leave this option unmarked.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Show List in Sorted Order

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Hint_for_Sorting_List_Box_Items)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

You have the option of viewing list box entries either in alphabetical order, or in the order in which they were added.

### To Sort List Box Items:

1. Click in the field where you want to call up a list box and press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Show list in sorted order` check box if you want to view the list in alphabetical order.

**or** Leave it unmarked if you want to view the list in the order that items were added.

4. Click **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1}
Advanced List Box Configuration Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Display Description First

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

When you add a list box item, you can also add a description that will appear next to the item in the list box. (The description will not appear in the field.) By default, the list box will display the items, then any description. You can opt to display the list with the description first, followed by the item. If you are also sorting on the item, the list box will be arranged in order of the descriptions.

## To Display the Description First:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Display description first` check box if you want the selections in the list box to be shown with the description first, followed by the item.

**or** Leave it unmarked if you want selections to be displayed with the item followed by the description.

4. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Use Wide List Display

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

It is possible to create list box items that are up to 252 characters long. If you have long items, you can widen your list box display to accommodate them.

## To Use the Wide List Display:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Use wide list display` check box if you want to display the wide list box. (This is recommended if you have long list box items.)

**or** Leave it unmarked if you want to display the standard list box. (This is recommended if you want to view more of the contact page.)

4. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Replace, Append or Insert

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

Usually when you pick items from a list box to enter into a field, you want to replace any previous entry in that field. However, sometimes you want to add the data to what was already there. This is usually important in fields which allow multiple entries.

For example, in the Documentation database, if a supermarket decided to add house & garden, do-it-yourself, and cookbooks to its retail line, you would want to pick "non-fiction" from the list box and add it to "pulp fiction" and "bestsellers" already listed in the `Categories of Interest:` field.

You have the option of appending data to the end of a field or inserting it at the beginning.

### To Make List Box Choices Replace Field Entries:

1. Click in the field where you want to call up a list box and press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Choose the `Replace the field` radio button.

4. Click **OK**.

### To Insert or Append List Box Choices to Field Entries:

1. Recall the List Box Configuration dialog box for the desired field. (See steps 1 and 2, above.)

2. Choose the `Append to the end` radio button if you want new items added at the end of any existing data in the field.

**or** Choose `Insert at beginning` if you want new items added at the beginning of the field. Any existing items will be placed after the new entry.

3. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Use List From Other Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

You may have multiple fields in the same database that will contain the same types of information. For example, you may have a `State:` field on more than one level in the database. When setting up a list box, rather than filling in the state information twice, it is possible to have fields share the same list box.

## To Share a List Box Between Fields:

1. Click in the field where you want to call up a list box and press F2.

   The list box will appear.

2. Click **Config**.

   The List Box Configuration dialog box will appear.

3. Mark the `Use list from other field` check box.

   The drop down list will become available.

4. Select the field whose list box you want to use.
5. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# List Box Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

List box options let you maintain your list boxes by performing such functions as printing, deleting, importing, and exporting list box entries.

### To Access List Box Options:

1. Click in the field for which you want to call up a list box then press F2.

   The list box will appear.

2. Click **Options**.

   The Listbox Options dialog box will appear.

Exporting and Importing List Box Items
Deleting All List Box Items
Printing List Box Items:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Exporting and Importing List Box Items

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

You can export the list of list box items to an ASCII file, which can then be imported into a list box in another database or another installation of TeleMagic.

To Export the List Box Items:
To Import List Box Items:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_List_Box_Options)<<1} List Box Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Export the List Box Items:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

1. Click in the field whose list box you want to export and press F2.

   The list box will appear.

2. Click **Options**.

   The Listbox Options dialog box will appear.

3. Click **Export**.

   A Save As dialog box will open.

4. Enter the path where you want to store the export file and give the file a unique name. It is recommended that you use the file extension .TXT. Be aware that if you select an existing file, it will be overwritten on export.

5. Click **Save** to proceed with the export.

   If you have entered an existing file name, you will be informed of the fact that the file already exists and asked if you want to overwrite.

6. Select **Yes** to proceed with the export and overwrite the existing file.

**or** Select **No** to abort the export process.

The list box items will be exported to a carriage-return, delimited ASCII file.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Import_List_Box_Items)<<1} To Import List Box Items:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_List_Box_Options)<<1} List Box Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Import List Box Items:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

1. Click in the field with the list box where you want to import and press F2.

   The list box will appear.

2. Click **Options**.

   The Listbox Options dialog box will appear.

3. Click **Import**.

   An Open dialog box will appear.

4. Enter the path and file name of the file you want to import into the list box.

- **or** Locate the file using the Drive and Directory boxes.

5. Click **Open**.

   The file will be imported. A message will appear informing you what was imported and what was merged.

   If an item did not already exist in the list box, it will have been imported. If the item did exist, it will be listed as merged. (If two items are the same, but the description is different, they will be listed as two separate items.)

6. Click **OK** to acknowledge this message.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Export_List_Box_Items)<<1} To Export the List Box Items:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_List_Box_Options)<<1} List Box Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Deleting All List Box Items

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

If you want to completely clear a list box, you can do so using the delete feature in Options.

## To Delete All List Box Items:

1. Click in the field whose list box items you want to delete and press F2.

   The list box will appear.

2. Click **Options**.

   The Listbox Options dialog box will appear.

3. Click **Delete All**.

   A message will appear asking you to confirm your decision to delete all items in the list box.

4. Click **Yes** to empty the list box.

**or** Click **No** to abort the process.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Delete_a_List_Box_Item)<<1} To Delete a Single List Box Item:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Remove_a_List_Box_from_a_Field)<<1} To Remove a List Box from a Field:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_List_Box_Options)<<1} List Box Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Printing List Box Items:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Note_for_Printing_List_Box_Items)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

You can make a printout of the items in the list box.

## To Print List Box Items:

1. Click in the field whose list box you like to print and press F2.

   The list box will appear.

2. Click **Options**.

   The Listbox Options dialog box will appear.

3. Click **Print**.

   A Print dialog box will appear.

4. Click **OK**.

   The list will print.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_List_Box_Options)<<1} List Box Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<1} Advanced List Box Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

*OLE*, or Object Linking and Embedding, is a powerful Windows feature that allows you to place non-text data into your records, and to update or edit that data as required. This feature can jazz up your pages considerably. For example, you could place into a company record or contact record such items as photographs of contacts or products or sales samples; recordings of verbal agreements or company jingles; spreadsheets, charts, or graphs; progress charts or project management records; or copies of documents and signatures. In the Documentation database, the company logos and national flags at the top center of each Company Data screen are Paintbrush pictures stored in an OLE field.

You add OLE fields using the Screen Designer just as you would any other field. What you enter into an OLE field can be different for each record, just as what you enter into a text field usually differs from record to record.

Unlike text fields, you can place objects of any size into an OLE field. Objects will “shrink” to fit the display area. When you want to view the object, you can open an OLE window to see the object at full size.

You can store objects in an OLE field in one of two ways: by linking, or by embedding.

You create *linked* objects in another program and store them in a file separate from your database. They may or may not be displayed on your contact screen, depending upon the source program. Instead, the icon for the program used to create the object may appear as a placeholder.

When you update the source file, a linked object in an OLE field will be updated also. Documents and spreadsheets maintained as separate files with their own programs and updated frequently by many users are good candidates for linking. On a network, linking can also save local disk space. (Damage to your database will not affect the original data in the linked object’s source file.)

You store *embedded* objects in the OLE field itself. OLE objects do not exist “outside” of the OLE field. If you copy an object from a source file, changes to that source file will not be made in the OLE field unless you re-embed or directly update the object. If you want to change an embedded object, you must open the program used to create the object, make changes, and re-save the object into the OLE field. If you want to copy data from original files, then update them in your database without changing the original file, you should use object embedding. Like linked objects, depending upon the source program, embedded objects may or may not be displayed on the Contact Screen.

If you try to insert Microsoft objects that have labels or captions into an OLE field, you may encounter problems. Microsoft Note it, Object Packager, and Equation Editor, for example, display the captions outside of the OLE field. If you want to use these applications and such problems occur, contact Microsoft for more information.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Embed_a_Picture_Spreadsheet_Chart_or_Other_Object_Using_Cut_and_Paste)<<1} To Embed a Picture, Spreadsheet, Chart, or Other Object Using Cut-and-Paste:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Embed_a_Sound_Document_or_Other_OLE_Object_Directly_From_a_File)<<1} To Embed a Sound, Document or Other OLE Object Directly From a File:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Link_a_Spreadsheet_Chart_Document_or_Other_Object)<<1} To Link a Spreadsheet, Chart, Document or Other Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_View_an_Object)<<1} To View an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Play_a_Sound)<<1} To Play a Sound:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_an_Embedded_Object_Other_than_Sound)<<1} To Edit an Embedded Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_a_Linked_Object_Other_than_Sound)<<1} To Edit a Linked Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Copy_a_Picture_or_Other_Object_from_One_Field_to_Another)<<1} To Copy a Picture or Other Object from One Field to Another:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Move_a_Picture_or_Other_Object_From_One_Field_to_Another)<<1} To Move a Picture or Other Object From One Field to Another:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Delete_a_Picture_or_Other_Object)<<1} To Delete a Picture or Other Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Embed a Picture, Spreadsheet, Chart, or Other Object Using Cut-and-Paste:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

Objects inserted into OLE fields are unique to the record into which they are entered. If you want to insert a picture which will appear on each and every record, you must use the Screen Designer to alter your contact screen. For help with adding fields in the Screen Designer see the Field Tool topic. For general help on using the Screen Designer, see the Screen Designer topic.

1. Open the OLE object you want to insert in its native application.
2. Select the object and copy it to the clipboard.
3. Open TeleMagic to the record which will contain the OLE object.
4. Click anywhere in the empty OLE field.

   The OLE field will be highlighted.
5. From the **Edit** menu, select **Paste**.

   The object will appear in the OLE field.
6. Click **Save**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_View_an_Object)<<1} To View an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_an_Embedded_Object_Other_than_Sound)<<1} To Edit an Embedded Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Embed a Sound, Document or Other OLE Object Directly From a File:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere in the OLE field.

   The OLE field will become highlighted.

2. From the **Edit** menu, select **Insert Object**.

   The Insert Object dialog box will open.

3. Select the **Create from File** radio button.

   The **File** text box will become available.

4. Enter the path and file name of the desired file in the **File** text box.

**or** Click the **Browse** button and use the Browse dialog box to locate the file.

5. Click **OK**.

   A representation of the selected object and the object's file name will appear in the OLE field.

6. Save the record.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_View_an_Object)<<1} To View an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Play_a_Sound)<<1} To Play a Sound:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_an_Embedded_Object_Other_than_Sound)<<1} To Edit an Embedded Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Link a Spreadsheet, Chart, Document or Other Object:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Open the object you want to link in its native application.
2. Copy the Object to the clipboard.
3. In TeleMagic, open the record which will contain the object.
4. Click anywhere on the OLE field.

   The OLE field will become highlighted.
5. From the **Edit** menu, select **Paste Special**.

   The Paste Special dialog box will open.
6. Select the **Paste Link** radio button.
7. Click **OK**.
8. The object, or the portion of the object selected in step 2, will be displayed in the OLE field.
9. Save the record.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_View_an_Object)<<1} To View an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_a_Linked_Object_Other_than_Sound)<<1} To Edit a Linked Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To View an Object:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere in the OLE Field. The OLE window will open.
2. Size or Maximize the OLE window to display the object full size.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Play_a_Sound)<<1} To Play a Sound:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Play a Sound:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere in the OLE field. The OLE window will open.
2. Double-click the Sound Recorder icon. The sound will play.
3. Click anywhere on the Contact Screen. The OLE window will close.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_View_an_Object)<<1} To View an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Edit an Embedded Object (Other than Sound):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere on the OLE field. The OLE window will open.

2. Double-click anywhere in the OLE window. The application used to create the object will open, with the embedded object open in a new file.

3. Edit the object as necessary.

4. When the necessary changes have been made, from the source application's Main menu, select **File**, **Exit & Return to TeleMagic**; or **File**, **Update**; or **File**, **Close** (depending on the application).

   A message will appear asking if you want to update the embedded object.

5. Click **Yes**.

   The source program will close.

6. Click anywhere on the contact screen.

   The object in the OLE field will be updated.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_a_Linked_Object_Other_than_Sound)<<1} To Edit a Linked Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Edit a Linked Object (Other than Sound):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere on the OLE field. The OLE window will open.
2. Double-click anywhere in the OLE window. The application used to create the object will open. The linked object source file will open.
3. Edit the source file data, and save the changes.
4. Switch back to TeleMagic. Click anywhere on the Contact Screen to close the OLE window.
5. Switch to the source application. Close the source file.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Edit_an_Embedded_Object_Other_than_Sound)<<1} To Edit an Embedded Object (Other than Sound):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Copy a Picture or Other Object from One Field to Another:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere in the OLE field to open the OLE window.
2. Press CTRL+C, or select **Copy** from the **Edit** menu.
3. Click anywhere outside the OLE window to close it.
4. Click anywhere in the second OLE field to open the second OLE window.
5. Press CTRL+V, or select **Paste** from the **Edit** menu.
6. Click anywhere on the Contact Screen to close the OLE window.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Move_a_Picture_or_Other_Object_From_One_Field_to_Another)<<1} To Move a Picture or Other Object From One Field to Another:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Move a Picture or Other Object From One Field to Another:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere in the OLE field to open the OLE window.
2. Press CTRL+X, or select **Cut** from the **Edit** menu.
3. Click anywhere in the second OLE field to open the second OLE window.
4. Press CTRL+V, or select **Paste** from the **Edit** menu.
5. Click anywhere on the Contact Screen to close the OLE window.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_To_Copy_a_Picture_or_Other_Object_from_One_Field_to_Another)<<1} To Copy a Picture or Other Object from One Field to Another:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Delete a Picture or Other Object:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(OLE Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. Click anywhere in the OLE field to open the OLE window.
2. From the **Edit** menu, select **Clear**.

**WARNING!**

Do not click Delete ( ● ) on the Contact Manager Toolbar. The Delete button will delete the entire record, not just the data in the OLE window.

3. Click anywhere on the Contact Screen to close the OLE window.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1} Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# The Notebook

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

The Notebook is your personal memo pad. You can use the pages of this pad to write and store notes to yourself on any subject, whether personal or related to your TeleMagic tasks. For example, you could keep Area Code lists, company goals, ideas on a particular topic, and telephone scripts in the Notebook.

Do not confuse the Notebook with an on-screen notepad. An on-screen notepad is linked to a specific contact and is intended to store information about that contact. The Notebook stores reference information not related to one specific record, or serves as a “holding tank” for text you want to transfer to a word processor later.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Viewing_Records_in_the_Notebook)<<1} Viewing Records in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Records_to_the_Notebook)<<1} Adding Records to the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Printing_Notebook_Records)<<1} Printing Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Deleting_Notebook_Records)<<1} Deleting Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Viewing Records in the Notebook

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

## To View a Record in the Notebook:

- From the **Office** menu, select **Notebook**.

**or**

1. From the Contact Manager Toolbar, click the Goto button:
   - 
2. Click **Notebook**.

   The Notebook will open.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Records_to_the_Notebook)<<1} Adding Records to the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Printing_Notebook_Records)<<1} Printing Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Deleting_Notebook_Records)<<1} Deleting Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

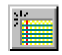
# Adding Records to the Notebook

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

## To Add a Record to the Notebook:

1. From the **Office** menu, select **Notebook**.

   The Notebook will open.

2. From the toolbar, select the New Note button: 

3. If you want to assign the record an ID, enter it in the `Note ID:` field. The Note ID can be used in sorting and searching for the Notebook record.

4. In the `Description:` field, enter a description that will uniquely identify this record. The Description can be used in sorting and searching for the Notebook record.

5. If you want to have this note available to anyone accessing the current database select the `Database` radio button.

**or** If you want to retain exclusive access to this note, select the `Personal` radio button.

6. Type the body of the record into the `Notes` text box. You can use the drop-down menus and buttons above the text area to change font style and size; to underline, italicize or bold-face text; to set margins; to insert color; and to insert bullets

   **Note**: Any changes such as these that you make to the appearance of the text will not be reflected when you print.

7. Click **Save** to save the record without exiting.

**or** Click **Close** to exit the notepad. If you have unsaved work, TeleMagic will prompt you to save. Click **Yes** to save your changes. Click **No** to abandon changes.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Viewing_Records_in_the_Notebook)<<1}Viewing Records in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Printing_Notebook_Records)<<1} Printing Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Deleting_Notebook_Records)<<1} Deleting

Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Listing and Finding Notes in the Notebook

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

There are three ways of viewing and locating Notebook records:

- You can use the VCR-style controls to scroll back and forth through the records one at a time, or to go to the end or beginning of all your Notebook memos;

- You can use the Browse button in the Notebook dialog box to see a list of all of the Notebook records;

- You can use the Notebook's Goto button to quickly locate a specific Notebook record based on the description or ID.

Before working with your records, you may want to set a sort order for viewing and working with your records. You can view your Notebook records in order by either the description or the Note ID.

To Set the Notebook Sort Order:
To Scroll through Notebook Records:
To Browse Records from the Notebook Dialog Box:
To Use the Notebook Goto:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Viewing_Records_in_the_Notebook)<<1}Viewing Records in the Notebook
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Records_to_the_Notebook)<<1} Adding Records to the Notebook
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Printing_Notebook_Records)<<1} Printing Notebook Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Deleting_Notebook_Records)<<1} Deleting Notebook Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Set the Notebook Sort Order:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

1. From the **Office** menu, select **Notebook**.

   The Notebook will open.

2. From the `Index:` radio buttons, select:

   - `Note ID` if you want your records to be in order by the `Note ID:` field;
   - `Description` if you want your records to be in order by the `Description:` field.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Scroll through Notebook Records:

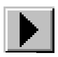
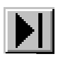
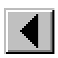
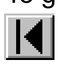
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

1. If you have not already done so, open the Notebook dialog box and set a sort order. (See To Set the Notebook Sort Order: for instructions.)

2. If you want to scroll through notes specific to the current database, select the `Database` radio button.

**or** If you want to scroll through your personal notes, select the `Personal` radio button.

3. Use the following guidelines when scrolling through your records:

   - To see the next record, click the Forward control: 
   - To go to the last record, click the End control: 
   - To see the previous record, click the Reverse control: 
   - To go to the first record, click the Beginning control: 

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1}
Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Browse Records from the Notebook:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

1. If you have not already done so, open the Notebook dialog box. (From the **Office** menu, select **Notebook**.)

2. If you want to browse notes specific to the current database, select the `Database` radio button.

**or** If you want to browse your personal notes, select the `Personal` radio button.

3. Click the Browse button:

   The Notebook Browse window will open.

4. If there are more records than can be displayed in a single window, use the scroll arrows to move through the records.

5. To go to one of the Notebook records, double-click on it.

**or** To close the browse and return to the Notebook records you were viewing before accessing browse, double-click the control box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Use the Notebook Goto:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

1. If you have not already done so, open the Notebook dialog box. (From the **Office** menu, select **Notebook**.)

2. If you want to go to a database specific note, select the `Database` radio button.

**or** If you want to go to one of your personal notes, select the `Personal` radio button.

3. Click the Goto button: ●

   The Go To Notebook Record dialog box will open.

4. If you want to search on the `Note ID:` field, select the `Note ID` radio button.

**or** If you want to search on the `Description:` field, select the `Description` radio button.

5. Enter the data for which you want to search in either the `Note ID:` or `Description:` field.

6. Click **OK**.

   The record will open.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1}
Listing and Finding Notes in the Notebook
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Printing Notebook Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

Printing Notebook records is handled differently from other documents. Additional options have been added to the Print Notebook feature to enhance the value of these records.

## To Print Notebook Records:

1. From the **Office** menu, select **Notebook**.

   The Notebook will open.

2. If you want to print a database specific note, select the `Database` radio button.

**or** If you want to print one of your personal notes, select the `Personal` radio button.

3. Click **Print**.

   The Print Notebook dialog box will open.

4. If you want to print the currently displayed Notebook record, choose the `Current Record` radio button. Skip to step 8.

**or** If you want to print all Notebook records in the current database or all of your personal records (depending on your selection in step 2), select the `All Records` radio button. Skip to step 8.

**or** If you want to print all records in a range, select the `Range of Records` radio button.

5. From the `Order by:` radio buttons, select `Note ID` if you want the records to print in alphanumeric order by the ID. If you have selected to print a range of records, this will also be used to establish the range based on the ID of the records.

**or** Select `Description` if you want the records to print in alphanumeric order by the description. If you have selected to print a range of records, this will also be used to establish the range based on the records' `Description:` field.

   If you have selected to print a range of records, you must establish the range of records to print. The `Beginning with:` field will default to the current record.

6. In the `Beginning with:` field, enter the ID or description of the first record in alphanumeric order in the range. (If you leave this field blank, it will start with the first record and print through to the record specified in the `Ending with:` field.)

7. In the `Ending with:` field, enter the ID or description of the last record in alphanumeric order in the range . (If you leave this field blank, it will start with the record specified in the `Beginning with:` field and print through to the last record.)

8. If you want to preview what will be printed, click **View**. See Page Preview for instructions on using the Page Preview window.

9. To print the records, click **Print**.

   A Windows Print dialog box will open.

10. Click **OK** and the records will be sent to the printer.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Viewing_Records_in_the_Notebook)<<1} Viewing Records in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Records_to_the_Notebook)<<1} Adding Records to the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Deleting_Notebook_Records)<<1} Deleting Notebook Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Deleting Notebook Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

1. From the **Office** menu, select **Notebook**.

   The Notebook will open.

2. Go to the record you want to delete.

3. Click the Delete button: 

   A pop-up message will appear asking you to confirm your decision to delete the record.

4. Click **Yes** to delete the record.

**or** Click **No** to retain the record.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Viewing_Records_in_the_Notebook)<<1}Viewing Records in the Notebook
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Adding_Records_to_the_Notebook)<<1} Adding Records to the Notebook
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Listing_and_Finding_Notes_in_the_Notebook)<<1} Listing and Finding Notes in the Notebook
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Printing_Notebook_Records)<<1} Printing Notebook Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Sorting, Selecting, and Finding Records

# Indexing

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

Before viewing, telephoning from, or doing a mail merge for many records, you may want to sort them into a specific order. For example, post office bulk mailing rates are lower if letters are pre-sorted and bundled by zip code. Therefore, you might want to pre-sort records by zip code before printing form letters.

The sample databases that were provided with TeleMagic come with a number of indexes based on the fields you are most likely to use. You can also create your own indexes and TeleMagic will add these to the list.

There is virtually no limit to the number of indexes you can create. However, if you have multiple indexes for a very large database (more than 10,000 records), or more than twenty-five indexes, it may increase the time it takes your database to load when you first start the program.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Indexes)<<1} Using Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Editing_Indexes)<<1} Editing Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Rebuilding_Indexes)<<1} Rebuilding Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Using Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

### To Sort Records Using an Existing Index:

1. If you have not already done so, open the Contact Manager and choose the level you want to view.

   **Example:** In the Documentation database, select the Company level

2. On the Contact Manager Toolbar, click the `Index:` drop-down list.

   The available index list will appear.

3. Use the scroll bar as necessary and select the index which places your records in the desired order.

   **Example:** Company Name

4. Look through your records. They will appear sorted in the order indicated by the index you selected.

### To Sort Records in the Order in Which they Were Originally Added:

1. On the Contact Manager Toolbar, click the `Index:` drop-down list.

   The available index list will appear.

2. Use the scroll bar as necessary and select `None`.

   The records will return to the order in which they were originally added to the database.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Editing_Indexes)<<1} Editing Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Rebuilding_Indexes)<<1} Rebuilding Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Creating Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

When you create an index, you tell TeleMagic which field to use to order records alphanumerically or by date. TeleMagic will sort the records by the data in the specified field.

You can sort lower-level records by fields on higher level records, but not vice versa. For example, for the Documentation database, you could sort Sales Contract-level records by company name, since every Sales Contract record is associated with only one company record. If you sorted Sales Contract records by company name, TeleMagic would group together all the sales contracts for each company and list them in alphabetical order by company name. However, you could not sort Company-level records by contract date, since each company could have many different active sales contracts. Therefore, each company could be associated with many different contract dates.

You can also create advanced indexes that use multiple fields or expressions to sort records. For example, you could sort all records first by country, and then within countries by region. Then, you might want to group all the records within a region by state. Or, you might want to sort all Sales Contract records by the difference between the Quote and the Order Amount fields.

To Create a New Index:
To Create a Multiple-Field Index with all Fields of the Same Type:
To Create a Multiple-Field Index with Fields of Different Types:
To Create an Advanced Index:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Indexes)<<1} Using Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Editing_Indexes)<<1} Editing Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Rebuilding_Indexes)<<1} Rebuilding Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Create a New Index:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**.

2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.

3. Click **Add**.

   The Select a Level to Index dialog box will open.

4. Choose the level you want to sort. (The current level will be highlighted.)

   The Add Index dialog box will open.

5. In the `Index Name` field, give the index a unique name.

**Warning!**
An index named “E-mail Lookup System Index for Level 1” is created automatically when you establish an e-mail key field. This is a reserved index name. Do not create an index named ” E-mail Lookup System Index for Level 1”.

6. If you want to create a filtered index, select the filter from the `Index Filter` list. (For more information on filtered indexes, see the Filtered Indexes topic.)

7. Click **Edit**.

   The Enter a Calculation Expression for this Field dialog box will open.

8. From the `Fields` list, select the field by which you want to sort.

   The field name will appear in the expression box followed by a default (+) sign.

9. When satisfied with the expression, click **OK**.

   The Index Expression dialog box will close. The index field name will appear in the Indexes dialog box.

   If you have selected a character field, the `Case Sensitive` check box will become available.

10. If you want your index to recognize upper-case and lower-case characters, mark the `Case Sensitive` check box. If this is marked, the index will place all of the records containing an upper-case character at the start of

the selected field at the top of the index, followed by all of the records with lower-case characters at the start of the selected field. (i.e., A - Z, a - z.)   This is useful if you want to do further sorting by case. A case-sensitive check will also be applied when you are searching for a record based on the data in the index field. If you want records to be sorted alphabetically, regardless of case (i.e., Aa - Zz), leave the `Case Sensitive` check box blank.

11. Mark `Check Duplicate` if you want the field on which the index is based to be used in duplicate record checking. As you add contact records, you may want TeleMagic to check to make sure that the records are unique. For example, you may add a Level 2 contact record without realizing that that same contact already has a record under a different Level 1 parent. With duplicate record checking, you can instruct TeleMagic to check for duplicate data when you enter text in the index field and warn you if a match is found. (See Duplicate Record Checking for more information on this feature.)

12. Mark `Multiple Index Search` if you want this index to be included when performing a search across multiple indexes. (See the Searching for Specific Records for details on using this feature.)

13. Mark `Maintain Position` if you want to retain your position in the index when data in the index field changes. For example, if you were indexing on the State field and changed a record's state from CA to NY, when you scrolled to the next record with `Maintain Position` marked you would move to the next record in California. If `Maintain Position` is not marked, TeleMagic will see NY in the field and move you to the next record in New York.

14. Select the `Ascending` radio button if you want to sort from A to Z, 0 to 9, or oldest to most recent

**or** Select the `Descending` radio button if you want to sort from Z to A, 9 to 0, or most recent to oldest.

In the Contact Manager, you have the option on Levels 2 and 3 to only view records associated with the current parent record. In order to only show you these records, TeleMagic creates an automatic index on the records' Contact IDs (which include information about the parent record). In order to be used when this option is selected, an index must begin with the portion of the Contact ID relevant to the selected level. If you have selected a character, unique number, memo, or phone field as your index expression, the `Use this index with the Contact Manager's "See Only" option` check box will become available. When selected, this check box will place the appropriate Contact ID information into the index. (See the topic To View Records for the Current

Parent Only for more information on the See Only option.)

15. If you want to be able to use this index when the See Only option is active in the Contact Manager, mark this check box.

**or** If you want this index available when the See Only option is not in use, leave this check box unmarked.

16. Click **OK**.

17. Click **Close**.

The Index selection box will close, and the Index Rebuild warning notice will appear informing you that you must rebuild the changed indexes before being able to use them. For index rebuild instructions, see Rebuilding Indexes. For full database rebuild instructions, see: Rebuilding Data.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Creating a Multiple-Field Index with all Fields of the Same Type:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

## To Create a Multiple Field Index:

1. From the **Contact Manager** menu, select **Contact Utilities**.

2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.

3. Click **Add**.

   The Select a Level to Index dialog box will open.

4. Choose the level you want to sort.

   The Add Index dialog box will open.

5. In the `Index Name` field, give the index a unique name.

6. If you want to create a filtered index, select the filter from the `Index Filter` list. (For more information on filtered indexes, see the Filtered Indexes topic.)

7. Click **Edit**.

   The Index Expression dialog box will open.

8. From the `Fields` list, select the first field on which you want to sort.

9. From the `Fields` list, select the second field on which you want to sort.

10. Repeat step 9, as necessary.

    Your completed index expression will look similar to the following:
    **contact1.country+contact1.region+contact1.state**

11. Click **OK**.

    The Index Expression dialog box will close. The field selections will appear in the Indexes dialog box.

    If you have selected a character field, the `Case Sensitive` check box will become available.

12. If you want your index to recognize upper-case and lower-case characters, mark the `Case Sensitive` check box. If this is marked, the index will place all of the records containing an upper-case character at the start of the selected field at the top of the index, followed by all of the records with lower-case characters at the start of the selected field. (i.e., A - Z, a - z.) This is useful if you

want to do further sorting by case. A case sensitive check will also be applied when you are searching for a record based on the data in the index field. If you want records to be sorted alphabetically, regardless of case (i.e., Aa - Zz), unmark the `Case Sensitive` check box.

13. Mark `Check Duplicate` if you want the field on which the index is based to be used in duplicate record checking. As you add contact records, you may want TeleMagic to check to make sure that the records are unique. For example, you may add a Level 2 contact record without realizing that that same contact already has a record under a different Level 1 parent. With duplicate record checking, you can instruct TeleMagic to check for duplicate data when you enter text in the index field and warn you if a match is found. (See Duplicate Record Checking for more information on this feature.)

14. Mark `Multiple Index Search` if you want this index to be included when performing a search across multiple indexes. (See the Searching for Specific Records for details on using this feature.)

15. Mark `Maintain Position` if you want to retain your position in the index when data in the index field changes. For example, if you were indexing on the State field and changed a record's state from CA to NY, when you scrolled to the next record with `Maintain Position` marked you would move to the next record in California. If `Maintain Position` is not marked, TeleMagic will see NY in the field and move you to the next record in New York.

16. Select the `Ascending` radio button if you want to sort from A to Z, 0 to 9, or oldest to most recent.

**or** Select the `Descending` radio button if you want to sort from Z to A, 9 to 0, or most recent to oldest.

In the Contact Manager, you have the option on Levels 2 and 3 to only view records associated with the current parent record. In order to only show you these records, TeleMagic creates an automatic index on the records' Contact IDs (which include information about the parent record). In order to be used when this option is selected, an index must begin with the portion of the Contact ID relevant to the selected level. If you have selected character, unique number, memo, phone, or numeric or date fields that have been converted to character in your index expression, the `Use this index with the Contact Manager's "See Only" option` check box will become available. When selected, this check box will place the appropriate Contact ID information into the index. (See the topic To View Records for the Current Parent Only: for more information on the See Only option.)

17. If you want to be able to use this index when the See Only option is active in the Contact Manager, mark this check box.

- **or** If you want this index available when the See Only option is not in use, leave this check box unmarked.

18. Click **OK**.

19. Click **Close**.

- The Index selection box will close, and the Index Rebuild warning notice will appear informing you that you must rebuild the changed indexes before being able to use them. For index rebuild instructions, see Rebuilding Indexes. For full database rebuild instructions, see: Rebuilding Data.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Create a Multiple-Field Index with Fields of Different Types:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**.
2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.
3. Click **Add**.

   The Select a Level to Index dialog box will open.
4. Select the level you want to index.

   The Add Index dialog box will open.
5. In the `Index Name` field, give the index a unique name.
6. If you want to create a filtered index, select the filter from the `Index Filter` list. (For more information on filtered indexes, see the Filtered Indexes topic.)
7. Click **Edit…**.

   The Enter a Calculation Expression dialog box will open.

   To use fields of multiple types, you must create an expression that converts all field types to character type.
8. Use the following guidelines when selecting fields:
   - If you want to use a character field, select the field from the `Fields` list.
   - If you want to use a numeric field, place your cursor in the `Create any type of expression` text area and type: **str()**. Place the cursor inside the parentheses. From the `Fields` list, select the field name. A plus sign (+) will be automatically added to the end of the field name inside the parentheses. Delete the plus sign, then type a comma, the field length, another comma, and the number of decimal places. If you will be using any additional fields, place your cursor outside the parentheses and add a plus sign.

   **Example:** str(contact3.amtorder,10,2) +

   - If you want to use a date field, type: **dtoc()** or select `dtoc()` from the `Date` drop-down list under `Functions`. Place the cursor inside the parentheses. From the `Fields` list, select the field name. A plus sign (+) will be automatically added to the end of the field name. Delete the plus sign within the parentheses. If you will be using any additional fields, place your cursor outside the parentheses and add a plus sign.

**Example:** dtoc(contract3.condate) +

Your completed index expression will look similar to the following:
**contact2.acctrep+str(contact3.amtordr,10,2)+dtos(contact3.condate)**

9. Click **OK**.

   The Index Expression dialog box will close. The expression will appear in the Indexes dialog box.

10. If you want your index to recognize upper-case and lower-case characters, mark the `Case Sensitive` check box. If this is marked, the index will place all of the records with an upper-case character at the start of the index field at the top of the index, followed by all of the records with lower-case characters at the start of the index field. (i.e., A - Z, a - z.) This is useful if you want to do further sorting by case. A case sensitive check will also be applied when you are searching for a record based on the data in the index field. If you want records to be sorted alphabetically, regardless of case (i.e., Aa - Zz), unmark the `Case Sensitive` check box.

11. Mark `Check Duplicate` if you want the field on which the index is based to be used in duplicate record checking. As you add contact records, you may want TeleMagic to check to make sure that the records are unique. For example, you may add a Level 2 contact record without realizing that that same contact already has a record under a different Level 1 parent. With duplicate record checking, you can instruct TeleMagic to check for duplicate data when you enter text in the index field and warn you if a match is found. (See Duplicate Record Checking for more information on this feature.)

12. Mark `Multiple Index Search` if you want this index to be included when performing a search across multiple indexes. (See the Searching for Specific Records for details on using this feature.)

13. Mark `Maintain Position` if you want to retain your position in the index when data in the index field changes. For example, if you were indexing on the State field and changed a record's state from CA to NY, when you scrolled to the next record with `Maintain Position` marked you would move to the next record in California. If `Maintain Position` is not marked, TeleMagic will see NY in the field and move you to the next record in New York.

14. Select the `Ascending` radio button if you want to sort from A to Z, 0 to 9, or oldest to most recent.

**or** Select the `Descending` radio button if you want to sort from Z to A, 9 to 0, or most recent to oldest.

In the Contact Manager, you have the option on Levels 2 and 3 to only view records associated with the current parent record. In order to only show you these records, TeleMagic creates an automatic index on the records' Contact IDs (which include information about the parent record). In order to be used when this option is selected, an index must begin with the portion of the Contact ID relevant to the selected level. When selected, the `Use this index with the Contact Manager's "See Only" option` check box will place the appropriate Contact ID information into the index. See the topic To View Records for the Current Parent Only: for more information on the See Only option.

15. If you want to be able to use this index when the See Only option is active in the Contact Manager, mark this check box.

**or** If you want this index available when the See Only option is not in use, leave this check box unmarked.

16. Click **OK**.

17. Click **Close**.

The Index selection box will close, and the Index Rebuild warning notice will appear informing you that you must rebuild the changed indexes before being able to use them. For index rebuild instructions, see Rebuilding Indexes. For full database rebuild instructions, see: Rebuilding Data (Rebuild).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Create an Advanced Index:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**.

2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.

3. Click **Add**.

   The Select a Level to Index dialog box will open.

4. Choose the level you want to sort.

   The Add Index dialog box will open.

5. In the `Index Name` field, give the index a unique name.

6. If you want to create a filtered index, select the filter from the `Index Filter` list. (For more information on filtered indexes, see the Filtered Indexes topic.)

7. Click **Edit…**.

   The Index Expression dialog box will open.

8. Create an expression following the guidelines in the Expression Builder topic. When creating an expression, keep the following points in mind:

   - The index will sort on the evaluated value of the expression. For example, if you select a field, the evaluated value of the expression is the contents of the field. If you perform a mathematical equation, the evaluated value will be the total of the equation.
   - If you want to sort on a portion of a field, use the **SUBSTR()** function to isolate the desired data.
   - If you are creating an expression that uses a combination of field types, remember that you must convert date and numeric fields to a character string.
   - If you want to perform a mathematical equation based on one or more numeric fields in combination with a character field, place the entire equation inside the **str()** function. For example, str(contact2.budget contact2.terms) would add the contents of the Budget and Terms fields, then convert the total to a character.

9. When satisfied with your expression, click **OK**.

   If your expression is valid, you will be returned to the Indexes dialog box. (If your expression is not valid, you will be given a warning. Correct the expression and click

**OK**.)

If you have selected a character field (or have converted all numeric and date fields to character strings), the `Case Sensitive` check box will become available.

10. If you want your index to recognize upper-case and lower-case characters, mark the `Case Sensitive` check box. If this is marked, the index will place all of the records containing an upper-case character at the start of the selected field at the top of the index, followed by all of the records with lower-case characters at the start of the selected field. (i.e., A - Z, a - z.) This is useful if you want to do further sorting by case. A case sensitive check will also be applied when you are searching for a record based on the data in the index field. If you want records to be sorted alphabetically, regardless of case (i.e., Aa - Zz), unmark the `Case Sensitive` check box.

11. Mark `Check Duplicate` if you want the field on which the index is based to be used in duplicate record checking. As you add contact records, you may want TeleMagic to check to make sure that the records are unique. For example, you may add a Level 2 contact record without realizing that that same contact already has a record under a different Level 1 parent. With duplicate record checking, you can instruct TeleMagic to check for duplicate data when you enter text in the index field and warn you if a match is found. (See Duplicate Record Checking for more information on this feature.)

12. Mark `Multiple Index Search` if you want this index to be included when performing a search across multiple indexes. (See the Searching for Specific Records for details on using this feature.)

13. Mark `Maintain Position` if you want to retain your position in the index when data in the index field changes. For example, if you were indexing on the State field and changed a record's state from CA to NY, when you scrolled to the next record with `Maintain Position` marked you would move to the next record in California. If `Maintain Position` is not marked, TeleMagic will see NY in the field and move you to the next record in New York.

14. Select the `Ascending` radio button if you want to sort from A to Z, 0 to 9, or oldest to most recent.

**or** Select the `Descending` radio button if you want to sort from Z to A, 9 to 0, or most recent to oldest.

In the Contact Manager, you have the option on Levels 2 and 3 to only view records associated with the current parent record. In order to only show you these records, TeleMagic creates an automatic index on the records' Contact IDs (which include information about the parent record). In order to be used when this option is selected, an index must begin with the portion of the Contact ID relevant to the selected level. If you have selected character, unique number, memo, phone, or numeric or date fields that have been converted to character in your index expression, the `Use this index with the Contact Manager's "See Only" option` check box will become available. When selected, this check box will place the appropriate Contact ID information into the index. (See the topic To View Records for the Current Parent Only: for more information on the See Only option.)

15. If you want to be able to use this index when the See Only option is active in the Contact Manager, mark this check box.

**or** If you want this index available when the See Only option is not in use, leave this check box unmarked.

16. Click **OK**.

17. Click **Close**.

The Index selection box will close, and the Index Rebuild warning notice will appear informing you that you must rebuild the changed indexes before being able to use them. For index rebuild instructions, see Rebuilding Indexes. For full database rebuild instructions, see: Rebuilding Data (Rebuild).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Indexes)<<1} Creating Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Rebuilding Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

If you have made any changes to your indexes, they must be rebuilt before they can be used.

Rebuilding indexes that have not been changed is a function of Rebuild. See Rebuilding Data (Rebuild) for more information.

## To Rebuild Indexes:

All other users must be out of the database when you rebuild indexes.

1. If you have made any changes to your indexes, choose **Build Indexes** from the `Indexes` selection box.

   A message will appear asking you to confirm your decision to rebuild the indexes.

2. Click **Yes**.

   The Rebuild status report will display the progress of the rebuild, and alert you when the rebuild is finished.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Editing Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

You can change the details of an index, create a copy of an index to change the details while keeping the original, or delete any existing indexes you no longer use. You can also copy indexes from other databases into the current database, providing that the field structure is compatible.

To Change an Index:
To Copy an Index:
To Delete an Index:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Indexes)<<1} Using Indexes
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Rebuilding_Indexes)<<1} Rebuilding Indexes
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Change an Index:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**.

2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.

3. Highlight the index you want to change and click **Change**.

   The Change Index dialog box will open displaying the index expression.

4. Make any necessary changes to the index following the same guidelines used when creating the index. (See To Create a New Index, for help.)

5. When satisfied with your changes, click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Editing_Indexes)<<1} Editing Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Copy an Index:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**.
2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.
3. Highlight the index you want to copy and click **Copy**.

   The Copy an Index dialog box will open.
4. Select the database which contains the index to be copied from the `Database:` drop down list.

   If you left the current database selected in the `Database` list, the `Copy this Index:` drop-down list will default to the index that was highlighted in the Indexes selection box. If you have changed databases, the `Copy this Index:` list will default to an index in the selected database.
5. If you want to copy an index other than the default, select it from the `Copy this Index:` list.

   The `New Index Name` field will default to `Copy of` followed by the current index name.
6. If you do not want to use the default, give the index a unique name.
7. When satisfied with your selections, click **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Editing_Indexes)<<1} Editing Indexes
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Delete an Index:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**.
2. Choose **Edit Indexes**.

   The Indexes selection box will open. It will list all existing indexes.
3. Highlight the index you want to delete and click **Delete**.

   You will receive a message asking you to confirm your decision to delete.
4. Click **Yes** to delete the index.

**or** Click **No** to retain the index.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Editing_Indexes)<<1} Editing Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Filtering

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

Before viewing, telephoning from, or doing a mail merge for many records, you may want to select certain records with which to work. For example, if you are having a special promotion in a particular region you would want to notify your customers in that area. To avoid confusion, you would not want to mention the promotion to customers outside the target region. In this scenario you would use filtering to pre-select records for customers from the target area before printing form letters announcing the promotion.

You choose sets of records to work with (filters) from a drop-down list on the Contact Manager Toolbar. The databases provided with TeleMagic come with a selection of sample filters. You can also create your own filters and add them to the toolbar drop-down list.

There is virtually no limit to the number of filters you can create. However, if you have multiple filters for a very large database (more than 10,000 records), it may take your database a long time to load when you first start the program.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Choosing_Filters)<<1} Choosing Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filter_Analysis_Counting_Records_in_a_Filter)<<1} Filter Analysis (Counting Records in a Filter)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Simple_Temporary_Filters_Field_Search)<<1} Creating Simple Temporary Filters (Field Search)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Using Tags to Create Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Creating_Filters)<<1} Creating Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Copying_and_Editing_Filters)<<1} Copying and Editing Filters

# Choosing Filters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

Generally speaking, filters search for records that contain a certain piece or type of data in one or more specified fields. For example, in the Documentation database, the Records in California filter searches for "CA" in the `State` field. You may have another filter that further limits the records that would be displayed by specifying a city or zip code in California. In addition to filters that include multiple fields on the same level, you may have filters that use multiple fields across more than one level. For example, you may have a filter that looks for records in California handled by the Account Rep JRC.

When choosing a filter there are two basic types of filters you may encounter:   Those that are based entirely on the same level, and those that are based on multiple levels. Before selecting a filter, it may be helpful to know what you can expect to see.

If you select a filter based entirely on the current level, only records that meet the filter criteria will be shown.

If you select a filter based entirely on a lower level than your current level (e.g., if you are on Level 2 and your filter is based on Level 3 fields), only records that are parents of a record meeting the filter criteria will be included.

If you are on Level 2 or 3 and select a filter based entirely on a higher level, only records that are children of records meeting the filter criteria will be included.

If you select a filter based on fields from multiple levels, a record must meet the criteria for any fields on its level, as well as having at least one child record that meets the criteria for any fields on a lower level (if applicable), and be the child of a record that meets the criteria for any fields on a higher level (if applicable).

Child records will appear in any on-screen Contact Rollup list, whether those children meet the filter criteria, or not. You will not be able to go to a child record that is not in the current filter from a Contact Rollup list.

## To Set a Filter:

1. If you have not already done so, open the Contact Manager and choose the level you want to view.

   **Example:**   In the Documentation database, choose Company

2. On the Contact Manager Toolbar, click the `Filter:` drop-down list.

   The available filter list will drop down.

3. Use the scroll bar as necessary and select the records with which you want to work.

   **Example:**   EC Companies.

4. Look through your records.

   Using the above example from the Documentation database, you will see only records for companies located in Europe.

### To Return to Working With All Records:

1. On the Contact Manager Toolbar, click the `Filter:` drop-down list.

   The available filter list will open.

2. Use the scroll bar if necessary and select `None - All records available`.

   All records in the database will be available for display.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Filter Analysis (Counting Records in a Filter)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

At times it may be useful to know how many records are defined by a given filter. You can perform a quick count of records in the current filter directly from the Contact Manager Toolbar, or perform an analysis of one or more filters from the Filters selection box.

To View Current Filter Statistics
To View Any Filter's Statistics

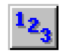
## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1}
Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To View Current Filter Statistics:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

1. From the Contact Manager Toolbar’s `Filter:` drop-down list, select the filter you want to analyze.

2. Click the Contact Manager Toolbar’s Count button: 

   The Filter Count dialog box will open, showing the name of the filter in the title bar.

•

   The analysis tells you how many records there were at each database level for this filter the last time that the filter was analyzed. In the `Last Count:` field, the date and time of that last analysis are shown. This count includes deleted records.

3. To update the analysis, click **Analyze**. The latest statistics will be displayed.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_View_Any_Filter_s_Statistics)<<1} To View Any Filter’s Statistics:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

# To View Any Filter's Statistics:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Filters**.

   The Filters selection box will open.

2. Click **Analyze**. The Select Filters to Analyze dialog box will open, showing all available filters in a list on the left.

3. Use the **Add** and **Remove** buttons to select the filters to be analyzed. You can also double-click a filter to select or deselect it. (All filters in the list on the right will be analyzed when you click **OK**.)

4. Click **OK**.

   The Filter Analysis dialog box will appear, displaying an analysis of the number of records in each filter.

5. If you want to view a printout of the filters, click **Print**.

   A Windows Print dialog box will appear.

6. Click **OK** and the analysis will be sent to your default printer.

7. When finished viewing the analysis, click **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_View_Current_Filter_Statistics)<<1} To View Current Filter Statistics:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

## Creating Filters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

When you create a filter, you tell TeleMagic which field or fields to use to select records containing specific information. For example, you might want to use records for contacts from the state of California. The field you would use to find these records is “State”. The information you would want TeleMagic to search for in that field is “California”. You can select records using fields from any level. (See Choosing Filters for information on how using fields from other levels will affect what records are available with the filter.)

To Create a Simple Filter:
To Create an Advanced Filter:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Create a Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

In the following example, you will create a filter for the Documentation database which picks out records for sales contracts that have closed.

1. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Filters**.

   The Filters selection box will open. It will list all existing filters.

2. Click **Add**.

   The Filters dialog box will open.

3. In the `Filter Name`: text box, give the filter a unique name.

   **Example:** Closed Sales Contracts.

4. Click **Edit**.

   The filter builder dialog box will open.

5. From the `Field` drop-down list, select the field you want to use to select records.

   **Example:** Sales Stage.

6. From the `Compares` drop-down list, pick the appropriate comparison.

   **Example:** Equal.

7. In the `To` text box, type the information you will use to select records, then press ENTER.

   **Example:** Closed.

   In addition to being able to filter on the actual text appearing in the field, you can use the following conditions:

   - .EMPTY Used to find fields containing no data.
   - .TODAY Used with date fields to locate records containing today's date.
   - .TAGGED Used to include tagged records in the filter.

   Using the above example, you have completed a filter that will look for "Closed" in the `Sales Stage` field. You could immediately save this filter by moving on to step 10. However, if you need to add more limits to your filter, or expand your filter, you may do so now. For example, you could expand your filter so that it finds all

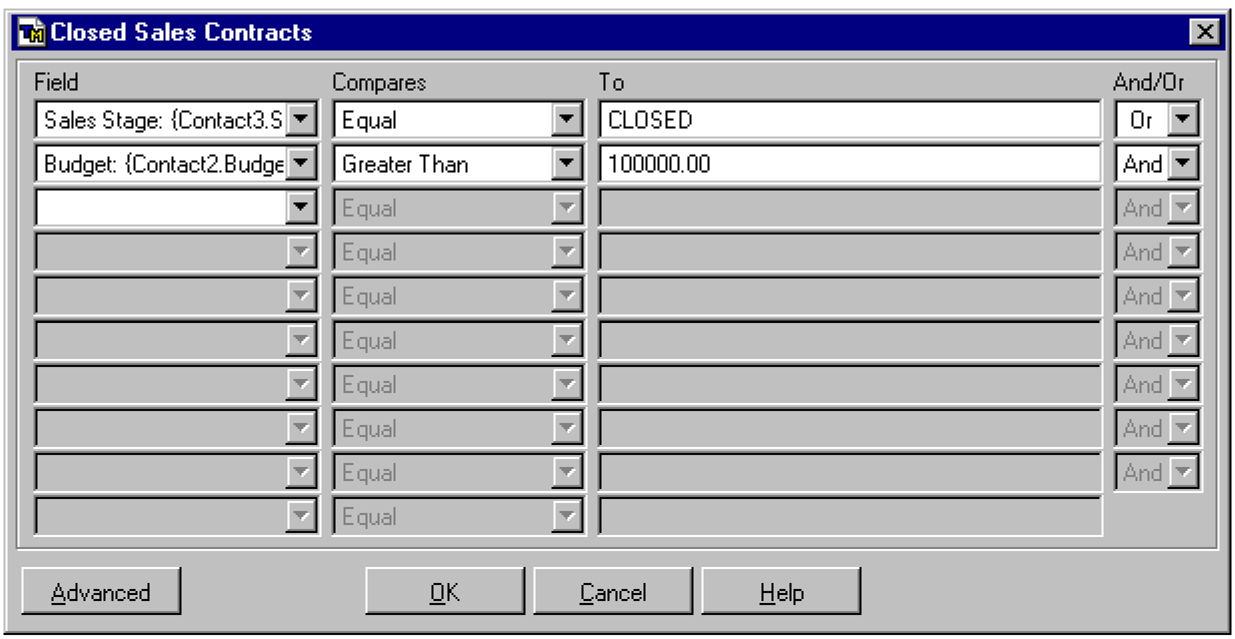
Closed records, as well as all records with a budget of over $100,000; or you could limit it so that it finds only closed sales with a warranty.

8. In the `And/Or field`, select:

   - `And` if you want to require that both lines of the filter be true for a record to be included in the filter. For example, if you wanted only records that are closed with a warranty, you would use `And`. (This option is the default.)
   - `Or` if either line of the filter can be true for the record to be included in the filter. For example, if you want to include records that are closed, or those with a budget of over $100,000 you would use `Or`. To access `Or`, place your cursor in the `And/Or` field and press the SPACEBAR.

9. Repeat steps 6 through 8 for the next line of the filter. You may have up to 10 lines in a filter. (If you need more than 10 filter criterion, see the To Create an Advanced Filter topic.)

   The completed filter expression will look similar to this:




**Sample Completed Filter Expression Dialog Box**

10. Click **OK**.

    You will be returned to the Filters dialog box.

11. Click **OK**.

    The Filters dialog box will close. The new filter will appear highlighted in the Filter selection box.

12. Click **Close**.

    The Filter selection box will close. The new filter will appear in the `Filter:` list on the Contact Manager Toolbar.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Create an Advanced Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Filters**.

   The Filters selection box will open. It will list all existing filters.

2. Click **Add**.

   The Filters dialog box will open.

3. In the `Filter Name:` field, type a name for the filter.

4. Click **Edit**.

   The filter expression dialog box will open.

5. Click **Advanced**.

   The Expression Builder will open.

6. Create an expression following the guidelines found in the Expression Builder topic. Records will be filtered by the evaluated value of the expression. (i.e., If you select a field, the evaluated value will be the data contained in the field; if you perform a mathematical calculation, the evaluated value will be the total of the calculation, etc.)

7. When satisfied with your expression, click **OK**.

   You will be returned to the Filters dialog box.

8. Click **OK**.

   The Filters dialog box will close. The new filter will appear highlighted in the Filter selection box.

9. Click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Copying and Editing Filters

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

After a filter is created, you may find that minor adjustments are necessary. TeleMagic lets you to change filters, or copy a filter so you can make changes while retaining the original. (This can also be used if you will be creating multiple filters that are similar.) Additionally, you can copy a filter from one database in your system into another, providing that the field structure is compatible.

To Copy a Filter
To Change a Filter
To Delete a Filter

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Copy a Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Filters**.

   The Filters selection box will open. It will list all existing filters.

2. Highlight the filter you want to use and click **Copy**.

   The Copy a Filter dialog box will open.

• If you want to copy a filter from a different database, select it in the `Database:` list.

   If you did not change the database in step 3, the `Copy this Filter:` list will default to the filter that was highlighted in the Filters selection box. If you did select another database, the `Copy this filter:` list will default to a filter in the specified database.

4. If you want to copy a filter other than the default, select it from the `Copy this Filter:` list.

   The new filter name will default to `Copy of` followed by the name of the selected filter.

5. Edit the new filter name in the `New Filter Name` field, if necessary.

6. Click **OK** when you are finished.

   The Filter will be copied and you will be returned to the Filters selection box. The copy of the filter will be in the list.

7. To edit the filter, see To Change a Filter.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Copying_and_Editing_Filters)<<1} Copying and Editing Filters
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Change a Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Filters**.

   The Filters selection box will open. It will list all existing filters.

2. Highlight the filter you want to edit and click **Change**.

   The Filters dialog box will open with the name of the filter in the `Filter Name` field.

3. Edit the filter name if necessary.

4. If you do not need to make any further changes, click **OK**.

**or** Click **Edit**.

   The Filter Expression dialog box will open if this is a standard filter, or the Expression Builder dialog box will open if this is an advanced filter.

5. Edit the `Field`, `Compares`, `To`, and `And/Or` fields as necessary following the guidelines used when adding the filter. (If you are unclear on these options, see To Create a Filter: for instructions.)

**or** Edit the expression appearing in the Expression Builder. (See the Expression Builder topic for information on creating expressions.)

6. When satisfied with your changes, click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Copying_and_Editing_Filters)<<1} Copying and Editing Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Delete a Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

1. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Filters**.

   The Filters selection box will open. It will list all existing filters.

2. Highlight the filter you want to delete and click **Delete**.

   A message will appear asking you to confirm your decision to delete.

3. Click **Yes**.

   The filter will be deleted.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Copying_and_Editing_Filters)<<1} Copying and Editing Filters
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Creating Simple Temporary Filters (Field Search)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½CONTACTX_Hint_for_Field_Search)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

There may be times when you need to see a particular group of records that you would not normally need to isolate. For example, you may need to see who placed orders last Thursday. You might not want to create a filter for this information as you will only need to access it this one time. TeleMagic allows you to create a quick, temporary filter that can be used during the current work session.

## To Create a Filter Using the Field Search Feature:

1. On the Contact Manager Toolbar, open the `Filter:` drop-down list.

**or** Open the **Filters** sub-menu from the **Contact Manager** menu.

The list of filters will open.

2. Select `Field Search`.

A Field Search dialog box will open.

3. From the `Select Field` list, click the field containing the data for which you want to search.

4. From the `Select Operation` list, choose the appropriate operator.

5. In the `Value to Search For` field, type the data for which you are searching.

6. Click **OK** to start the search.

The Contact Manager will display the first record that matches your search.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Using Tags to Create Filters

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

You may want to work with a group of records that cannot easily be defined by a filter. For example, you may want a list of all your contacts in California and twelve others from different states. To do this, you would first create a filter for all contacts in California, then tag all records in that filter, and finally tag the twelve other contacts individually.

To Create a Set of Unrelated Records (Tagging Records):
To Filter on Tagged Records:
To Tag and Untag all Records:
To Tag and Untag all Records in a Filter:
To Invert Tagged Records:
To Tag Marked Records:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Create a Set of Unrelated Records (Tagging Records):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Open any record that you want to add to your group of unrelated records.
2. From the **Current Record** menu, select **Tags**, **Tagged**.

**or** Mark the `Tagged` check box on the Contact Manager Toolbar.

**or** Press ALT+T on the keyboard.

3. Repeat this for every record that should be in the new group.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Using Tags to Create Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

# To Filter on Tagged Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

- 
- From the `Filter:` drop-down list, select `Tagged Records`.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Using Tags to Create Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

## To Tag and Untag all Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Current Record** menu, select **Tags**, **Tag All**.
2. When you have finished using all records, from the **Current Record** menu, select **Tags**, **Clear All**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Using Tags to Create Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

## To Tag and Untag all Records in a Filter:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. With the filter selected, from the **Current Record** menu, select **Tags**, **Tag All in Filter**.
2. When you have finished using the group of records, from the **Current Record** menu, select **Tags**, **Clear All in Filter**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Using Tags to Create Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

# To Invert Tagged Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

There will be times when you will want to work with a large set of records that can *almost* be defined by a filter, but not quite. For example, you might want to send out new product information to all your contacts in France, except for the seven contacts whom you have invited to the product launch who will see it personally. To do this, you can use the Invert Tags feature.

1. With the appropriate filter selected, individually tag the contacts you want excluded from your group. (To do this, follow the instructions in the To Create a Set of Unrelated Records topic.)
2. From the **Current Record** menu, select **Tags**, **Invert all in Filter**. This will tag all the records in the filter that were previously untagged, and vice-versa.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Using Tags to Create Filters

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

## Filtered Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

The filtered index feature allows you to radically shorten the time it takes to move around a database, whether you are browsing a list of filtered records or running a report on a subset of your database.

Normally, when you set an index, TeleMagic re-orders every record in your database; then, when you set a filter to define the sub-group of those records with which to work, TeleMagic searches the database and only shows you the specified records. The other records in the database remain in the background in index order. When you navigate through your records, TeleMagic must look at each record to ascertain if it applies to the filter, skipping the ones that do not meet the filter criteria. This allows TeleMagic to accommodate a change of filters while an index is in use.

A filtered index automatically establishes a built-in filter as soon as you choose the index, and manages those filtered records as if they were the only records that exist in the database. When you select a filtered index, you are telling TeleMagic that it will only need to look at records in the specified filter when this index is selected. It will not need to keep the other records sorted in the background, but can simply “remember” which records belong to this index and only work with those.

In practical terms, when you set a filtered index, all database functions are sped up dramatically:

- You can slash the time it takes to search through the database for a particular record.
- You can bring up a browse window much more quickly than would otherwise be possible.
- You can generate reports and quick lists in a fraction of the usual time.
- You can dramatically increase productivity by speeding up database operations.
- You can create filtered indexes as easily as you would create a standard index.

Because TeleMagic “remembers” which records apply to any filtered index in your database, when you add or edit records there will be a slight pause as TeleMagic determines to which (if any) filtered indexes the record applies and updates the filtered index accordingly. When you are adding filtered indexes, keep in mind that the more filtered indexes you have, the longer this process will take.

### To Create a Filtered Index:

1. From the **Contact Manager** menu, select **Contact Utilities**.
2. Choose **Edit Indexes**.

   The Indexes selection box will open, listing all existing indexes.
3. Click **Add**.

The Select a Level to Index dialog box will open.

4. Choose the level you want to sort.

   The Add Index dialog box will open.

5. In the `Index Name` field, type an index name.

   **Example:** Cities in California - Filtered Index.

6. Use the `Index Filter` drop down list to select a filter to attach to this index. To be used in a filtered index, a filter must include only fields (no advanced filters based on expressions) on the same level as the index. If you selected Level 2 in the Add an Index dialog box, any filter that contains Level 1 or Level 3 fields or expressions will not be shown on this list. (If the filter you want to use does not exist, see Creating Filters for help with creating it.)

7. Add the index following the instructions in the Creating Indexes topic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Filters_with_Filtered_Indexes)<<1} Using Filters with Filtered Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

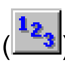
## Using Filters with Filtered Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Filtersï¿½ ï¿½ ï¿½ )<<1}

It is possible to further sort your filtered index by selecting an additional filter in the `Filter:` list on the Contact Manager Toolbar. If the filter is different from the one attached to the index, a record must meet both filter criteria to be viewed.

For example, you may have a filtered index that includes all records in California. You can then create filters on the various cities in California. In the background TeleMagic will still be using the entire list of records in California, but you will only see those in the specified city. While this is not as fast as just using a filtered index, it is faster than if TeleMagic had to search the entire database.

This is useful if you will only be using these records for a single work session and do not want to create a separate index for them. Additionally, if you created a filtered index for each city in California, every time you added or edited a record, TeleMagic would have to check each filtered index to ascertain if the record belonged to that filter. With intelligent planning you can use a single filtered index in conjunction with other filters to minimize this delay.

If you select a filter with your filtered index, the Count button () located on the Contact Manager Toolbar next to the `Filter:` field will show the number of records in the entire database for that filter (not just those in the filtered index). The Count button is solely linked to the filter and has no relationship to a filtered index.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtered_Indexes)<<1} Filtered Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Goto

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Selecting the Goto button  on the Contact Manager Toolbar brings up the Goto dialog box.

The Contact Manager Goto feature allows you to quickly navigate through TeleMagic and locate records. Using Goto you can:

- Find a record based on information stored in any field;
- Quickly change your filter and index;
- Go to any level, view, or page of the current database;
- Change databases “on the fly”;
- Access your Notebook Records
- Quickly access a marked record;
- Quickly go to the last record added;
- Access a browse list of your pending activities;
- Access a browse list of your contacts;

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1}
Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Using Goto to Navigate the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Rather than having to change levels, select a view, set a filter and index, then find the desired page, you can use Goto to go directly to a specified location in your database. The Goto feature allows you to go immediately to any page, view, and level of your database with a specified filter and index already set.

## To Navigate through the Contact Manager Using Goto:

1. From the Contact Manager Toolbar, click the Goto button:

   The Goto dialog box will open.

   The options in this dialog box will default to the current settings in the Contact Manager.

2. If you want to go to a different level, select it from the `Level:` drop down list.
3. If you want to set an index, select it from the `Index:` drop down list.
4. If you want to set a filter, select it from the `Filter:` drop down list.
5. If you want to change your view, select a screen set from the `View:` drop down list. (For more information on views, see the What is a Contact View? topic.)
6. If you want to go to a specific page, select it from the `Page:` drop down list. This list will contain all pages in the specified level and view.
7. When satisfied with your selections, click **OK**.

   The Contact Manager will open to the specified location.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Searching for Specific Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

The quickest way to locate a specific record in TeleMagic is to search for and access that record via the Goto feature. Once you have a piece of information about the record, you can go directly to it. For example, in the Documentation database, you might want to go to a record for a specific company or contact. Using Goto, you avoid scrolling through records until you find the right one.

You will sometimes need to locate a specific contact record based on very little information. You might, for example, know the contact's first name, or know that the company you are looking for is located in a certain city. While you could create a filter to find such records, using the Goto feature will help you locate them much more quickly.

Basically, Goto gives you two different ways of locating a record that contains a particular piece of information:

- A field search for a record that contains a piece of data in a field used in an existing index (or multiple indexes). See: To Find a Specific Record Based on Data in an Indexed Field
- A field search that looks for records which contain a piece of data in any field, whether or not there is already an index on that field. See: To Find a Specific Record Based on Data in a Non-indexed Field:

Starting a Goto search is not the same as selecting a filter. A quick search does not find *every* record matching the description you give; only the *next* record in the index matching your description. If you need to find all records matching a certain description, you should use the filter feature described earlier in this chapter. You may also find it helpful to read the Using Indexes and Choosing Filters topics.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Find a Specific Record Based on Data in an Indexed Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the Contact Manager Toolbar, click the Goto button:
   •

   The Goto dialog box will open.

   The `Find:` field will default to the data that was last entered in the field.

•

2. Type the data you want to use to locate the desired record in the `Find:` text box.

   **Example:** The first name of the contact you are trying to locate is Nels. Type ***Nels***.

3. Choose the level you want to search from the `Level:` drop down list.

4. Select the index you want to use in the search from the `Index:` list. Make sure the index you choose uses the field that contains the data for which you are searching.

•

   **Example:** You know the contact's first name. Choose `Contact Name:` as the index.

**or** If you want to search through all indexes that have been set up for use with the multiple index search feature, select `Multiple Index Search` from the list of indexes. (See step 12 under To Create a New Index for instructions on creating Multiple Index Search indexes.)

•

   **Example:** Level 2 of the Documentation database has 5 phone fields (including the fax field). You have a phone number for the contact, but do not know which phone field contains it. If you have created indexes based on your phone fields with multiple index search enabled, rather than performing 5 separate searches, simply enter the phone number and TeleMagic will locate it in any of the fields.

5. If you would simply like to locate the record, skip to step 9.

**or** If you want to display a particular page of the record in a particular view and set a filter, refer to steps 6 through 8.

6. If you want to set a filter, select that filter from the `Filter:` list. Be aware that if you select a filter that does not contain the record, Goto will not be able to locate it.

7. If you want to view the record in a particular view, select that view from the `View:` list.

8. If you want to open the record to a particular page, select

it from the `Page:` list.

9. When you have defined your search, click **OK**.

   The Contact Manager will display the first record that matches your search.

- **or** If no record matches the search, a browse window will display your records.

   The browse window will display the closest match to your search criterion.

10. Select a record from the browse window and press ENTER.

   The record will open to the specified view and page. The index used in the search will be active, as well as any filter you set.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Find_a_Specific_Record_Based_on_Data_in_a_Non_indexed_Field)<<1} To Find a Specific Record, Based on Data in a Non-indexed Field:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Find a Specific Record Based on Data in a Non-indexed Field:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the Contact Manager Toolbar, click the Goto button:

   The Goto dialog box will open.

2. Choose the level you want to search from the `Level:` drop down list.

3. From the `Filter:` list, select `Field Search`.

   The Field Search dialog box will open.

4. From the `Select Field` list, choose the field containing the data for which you want to search.

   **Example:** Product Category

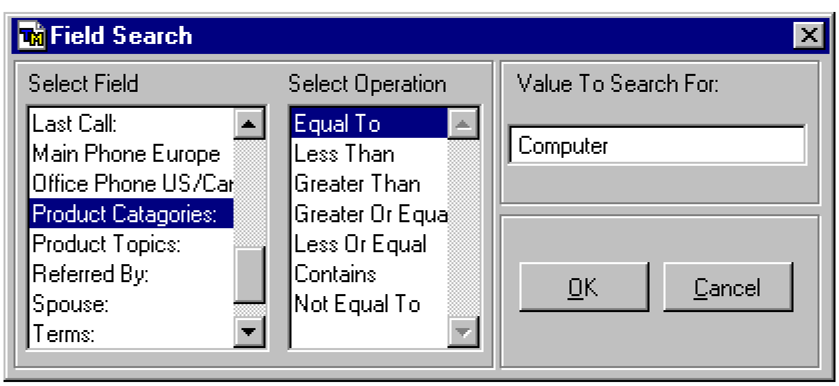
5. From the `Select Operation` list, choose the appropriate operator.

   **Example:** Equal To

6. In the `Value to Search For` text box, enter the data for which you are searching.

   **Example:** Computer

   Your dialog box will look something like this:




**Completed Field Search Dialog Box**

7. Click **OK** to exit the Field Search dialog box.

8. From the Goto Screen, click **OK** to locate the record.

   The Contact Manager will display the first record that matches your search. The Field Search filter will be set as the Contact Manager filter. It will be checked in the

**Filters** sub-menu of the **Contact Manager** menu, and will appear in the Filter drop-down list on the Contact Manager Toolbar (if configured). Only records that match the specified search criterion will be available until you change the filter.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Find_a_Specific_Record_Based_on_Data_in_an_Indexed_Field)<<1} To Find a Specific Record, Based on Data in an Indexed Field:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Changing Databases During a Search

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic's Goto feature provides you with a quick and easy way to switch databases during a search.

## To Change Databases During a Search:

1. From the Contact Manager Toolbar, click the Goto button:
   •

   The Goto dialog box will open.

2. Click **Database**.

   The Select Database selection box will open.

3. Highlight the database you want to open.

4. Click **Open**.

   The Database will open.

5. Click the Goto button on the Contact Manager Toolbar to continue your search.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Notebook Access

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Goto allows you quick access to your Notebook.

### To Access the Notebook from Goto:

1. From the Contact Manager Toolbar, click the Goto button:
   - 

   The Goto dialog box will open.

2. Click **Notebook**.

   The Notebook will open.

3. For help with using the Notebook, refer to the following topics:

Listing and Finding Notes in the Notebook
Adding Records to the Notebook
Printing Notebook Records
Deleting Notebook Records

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Marked Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Marking a record is similar to placing a bookmark in a book. Once a record is marked, you can use Goto to quickly return to that record. You are able to mark as many records as you like in any database.

Do not confuse marking records with tagging records. Marking a record allows you to quickly return to it. Tagging a record allows you to include it in the Tagged Records filter. (This feature allows you to filter a group of records that are not related in any other way.) For information on tagging records, see To Create a Set of Unrelated Records (Tagging Records).

## To Mark and Return to a Record:

1. Display the record.
2. From the **Current Record** menu, select **Mark**.

**or** Click in the `Marked` check box on the Contact Manager Toolbar.

**or** Press ALT+M on the keyboard.

3. Move to another record.
4. To return to the marked record, click the Goto button:

   The Goto dialog box will appear.

5. Click **Marked record**.

   If there is only one marked record in the database, TeleMagic will return to the marked record. If there are multiple marked records, you will be given the Select Marked Record dialog box.

   This dialog box will display the marked records from each database in the order that the records were marked, the level on which the marked record is located, and a description of the record (based on your Record Descriptor established in Key Fields).

6. If you want to unmark a record from this screen, highlight it on the list and click **Clear Mark**. The record will be unmarked when you exit this dialog box.

**or** If you want to remove all marks, click **Clear All**. You will be asked to confirm your decision to clear all marks. If you select **Yes**, the marks will be cleared and you will return to the Goto dialog box. If you select **No** you will remain at the Select Marked Record dialog box.

7. If you want to go to one of the marked records, highlight it on the list and click **Goto**.

**or** Click **Close** to return to the Goto dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Tag_Marked_Records)<<1} To Tag Marked Records:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Tag Marked Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

- From the **Current Record** menu, select **Tags**, **Tag Marked**.

  Any records you have marked will be tagged. You can now include them in the Tagged Records filter.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Marked_Records)<<1} Marked Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Using_Tags_to_Create_Filters)<<1} Tagged Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

# Last Record Added

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Manageri¿½ ï¿½ ï¿½ )<<1}

## To Go To the Last Record Added to the Database:

1. From the Contact Manager Toolbar, click the Goto button:
   ●

   The Goto dialog box will open.

2. Click **Last record added**.

   TeleMagic will display the last record added to the current level.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Using Goto to Access Contact Browse

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Open the view for the level you want to browse.
2. Choose a filter and index for the records you want to browse, if desired.

**WARNING!**
If you have more than 30,000 records in your database, do not apply a filter before using browse view. If you do, you will encounter significant delays while TeleMagic applies the filter.

3. From the Contact Manager Toolbar, click the Goto button to open the Goto dialog box, then click **Contact Browse**.

   The option **Browse** will appear at the end of the Main menu and the Browse window will open.

   The name of each field in the level you selected will appear at the top of the Browse window. The corresponding data for each record will appear in column form beneath each field name.

4. Use the scroll bars at the bottom and right of the Browse window to scan across records and down field columns.
5. If you want to go to a record, highlight it and press ENTER. Browse will close and the record will be displayed.

**or** To exit Browse and return to the current record, double click the control box or press ESC.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Move_a_Field_in_Browse_View)<<1} To Move a Field in Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Exit_Browse_View)<<1} To Exit Browse View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Goto)<<1} Goto

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Sorting_Selecting_and_Finding_Records)<<1} Sorting, Selecting, and Finding Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Working with Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Duplicate Record Checking
Reassigning Child Records
Deleting and Recovering Records
Record Initialization

# Duplicate Record Checking

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Indexesï¿½ ï¿½ ï¿½ )<<1}

There may be occasions when the same record is added to a database more than once. For example, more than one user may add a record for the same person. Duplicate record checking allows you to search for duplicate entries in specified fields.

When you create an index, you have the option of specifying that the field on which you are sorting should be used to search for duplicate records. When an entry is made in this field (regardless of which index you are currently using) TeleMagic will search the contents of the field for all records in your database. If another record contains the same information in the field, you will be notified and given the opportunity to correct the data (if applicable). If you choose to create the duplicate record, you can use the index to view the other record containing the same data. (Set the index, then simply view the records in browse or scroll to the next record.)

If you have a number of duplicate records in your database, you can use Group Duplicate Record Checking to have TeleMagic tag all of the duplicate records in your database.

## To Perform Group Duplicate Record Checking:

1. From the **Contact Manager** menu, select **Contact Utilities**, **Group Duplicate Checking**.

   The Duplicate Record Checking dialog box will open.

2. If you have defined more than one index to search for duplicate records, select the index on which you want to search in the `Search for duplicates using index:` field.

3. If you want to limit your search to a specific group of records, select a filter in the `Only find duplicates within filter:` field.

4. If you want TeleMagic to ignore records that have no entry in the field, mark the `Disregard blank entries` check box. (If you do not mark this check box and you have more than one record with no information in this field, the records will be viewed as duplicates.)

5. Click **OK** to commence with the search.

   A message will appear informing you that any existing tags in the database will be cleared and asking if you want to continue.

6. Click **Yes** to continue.

**or** Click **No** to abort.

If you select **Yes**, TeleMagic will begin to search the database for duplicate records.

A message will appear apprising you of the status as TeleMagic searches the database. When it is complete, a message will appear informing you of how many duplicate records were found and tagged. You will have the opportunity of setting the Tagged Records filter to view the duplicates.

7. Select **Yes** to set the filter to the Tagged Records filter.

**or** Select **No** to return to the Contact Manager using your original filter.

8. If you have selected the Tagged filter, from the Contact Manager Toolbar set the index you used to check for duplicates.

9. Scroll through the records, or access Browse view, to view the duplicate records. (Duplicates will be next to each other in index order.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Working_with_Records)<<1} Working with Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Reassigning Child Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Record reassignment allows you to assign Level 2 or Level 3 records to a different parent record without having to delete and re-add each individual record, thus saving you time and effort. All attached activities, To-Dos, sales forecasts, and any child records (if applicable) will be moved as well. (When you assign a Level 2 record to another parent, all Level 3 children will also be moved with it.)

You must have rights to both add and delete records in the database to use this feature. If you want to reassign a group of records, set a filter to define the group before accessing the Reassign dialog box. (See Creating Filters for more information.)

## To Reassign a Record(s):

1. Go to the record you want to re-assign.

2. From the **Contact Manager** menu, select **Contact Utilities**, **Reassign Records**.

   The Reassign Records dialog box will open.

3. To reassign the current record to another parent, select the `Current Record` radio button and skip to step 5.

**or** To reassign a group of records, select the `Multiple Records with filter` radio button.

   If you select `Multiple Records with filter`, the filter list will become active. (There will be no filter showing in the field—even though filters are available—until you select one from the list.)

4. Select the filter that specifies the group of records you want reassigned.

   Use the `Reassign to:` section to locate the new parent for the records you are reassigning.

5. Select an index from the `Using index` field. The available parent records will be sorted according to this index to facilitate locating the appropriate record.

6. If you know the data that is contained in the selected index field for the desired parent, enter it in the **Search for** field and click **Search for**. (For example, if you were using the Company index, enter the desired company name in the field.)

**or** If you do not know the appropriate data, leave the field blank and click **Search for**.

   A browse window will open with a list available parent records sorted according to the selected index. (If you are reassigning Level 3 records, the list will include all

Level 2 records; if you are reassigning Level 2 records, the list will include all Level 1 records.) If you made an entry in the **Search for** field, the closest matching record will be highlighted.

7. Double-click on the record of your choice.

   You will be returned to the Reassign Records dialog box. The record descriptor for the selected record will display in the `Parent Info:` field and the **Reassign** button will become available.

8. Click **Reassign**.

   The child record(s) will be moved to that parent record and a confirmation dialog will appear.

9. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP□CONTACT1_)<<1} What’s a Relational Database?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Working_with_Records)<<1} Working with Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Deleting and Recovering Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Obsolete, unnecessary, and superseded records take up storage space and memory. Such records should be removed whenever they are identified. Often, you will need to delete just a single record. Sometimes you may need to delete entire groups of records. For example, if your company no longer does business in a particular state, you will probably want to delete all records for that state.

To Delete a Single Record:
To Delete a Group of Records:
To Recover Records:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Working_with_Records)<<1} Working with Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## To Delete a Single Record:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Display the record.
2. From the Contact Manager Toolbar, click the Delete button: •

   A message will appear asking you to confirm your decision to delete the current record and (if you are on Level 1 or 2) any child records attached to it.

**WARNING!**
Deleting a Level 1 or Level 2 record will also delete all related lower lever records. For example, in the Documentation database, deleting the Company record “Barrens Books & Subscription Svcs” would also delete the “John Mason” contact record, and John Mason’s sales contract record.

3. Click **Yes** to delete the record.

**or** Click **No** to abort.

   If there are activities linked to the record, a message will appear asking if you want to delete related activities.

4. Click **Yes** if you want to delete any activities linked to this record to which you have access.

**or** Click **No** to retain any linked activities. They will no longer be linked to a contact.

5. Move to another record. The record you deleted will no longer appear.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Delete_a_Group_of_Records)<<1} To Delete a Group of Records:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Recover_Records)<<1} To Recover Records:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Working_with_Records)<<1} Working with Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Delete a Group of Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

In the following example, we will delete all records in the Documentation database for the state of California.

1. If you have not done so already, create a filter containing the records you want to delete. For help with creating filters, see: Creating Filters

2. From the **Contact Manager** menu, select **Contact Utilities**, **Group Delete/Recover**.

   The Select a Level to Delete/Recover dialog box will open.

3. Choose the record level from which you want to delete.

   The Group Delete/Recover dialog box will open.

4. To simultaneously delete all activities linked to the contacts to be deleted, leave the `Permanently delete related activities` check box marked.

**or** To retain any activities linked to the contacts to be deleted, unmark the `Permanently delete related activities` check box.

5. From the `Records to delete/recover` drop-down list, select the filter that defines the records you want to delete.

**WARNING!**
If you select `None - All records Available` from this list, *all* records in your database will be deleted.

6. Click **Delete**.

   While deleting the records, TeleMagic will display a status box that keeps a count of how many records have been deleted.

   When TeleMagic has finished deleting the records, you will be returned to the Contact Manager.

When you delete records, deletion is not permanent until the database is rebuilt. If you accidentally delete records, but have *not* performed a rebuild, you can recover the records. See: To Recover Records

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Delete_a_Single_Record)<<1} To Delete a

Single Record:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Working_with_Records)<<1} Working with Records
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Recover Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Recovering records will recover all records that have been deleted from the selected filter since the last rebuild that packs and reindexes was performed.

1. If appropriate, create a filter for the records you want to recover.

2. From the **Contact Manager** menu, select **Contact Utilities**, **Group Delete/Recover**.

   The Select a Level to Delete/Recover dialog box will open.

3. Choose the record level which contained the records you want to recover.

   The Group Delete/Recover dialog box will open.

4. Choose the `Recover` radio button.

5. If you want to recover deleted activities that were linked to the records being recovered, mark the `Related Activities` check box. This will recover both activities that were deleted with the record and activities that were deleted manually prior to deleting the record.

6. From the `Records to delete/recover` drop-down list, select the filter for the records you want to recover. All records that have been deleted since the last rebuild that packed the database will be recovered. (This will include both records that were deleted using group delete and those that were deleted individually from the Contact Manager Toolbar.)

7. Click **Recover**.

   While recovering the records, TeleMagic will display a status box that keeps a count of how many records have been recovered.

   When TeleMagic has finished recovering the records, you will be returned to the Contact Manager.

## Continue…


{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Deleting_and_Recovering_Records)<<1} Deleting and Recovering Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Working_with_Records)<<1} Working with Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Handling Activities in the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic contains a full-blown Activity Manager, described in detail in the Activity Manager topic. While you can always switch to your Activity Manager while working in the Contact Manager, sometimes this is inconvenient: for example, you may simply want to see when your next scheduled activity is due, or quickly add an item to your To-Do list without having to go to the trouble of opening the Activity Manager, finding the relevant information, closing the Activity Manager, and reloading the Contact Manager.

For this reason, TeleMagic allows you to work with activities from the contact screen without having to launch the Activity Manager. You are able to add activities directly from the Contact Manager. There are also several tools for viewing your activities from the Contact Manager. You can view a list of all activities linked to a particular contact using the View Activities tool () on the toolbar or view a full list of all pending activities (whether linked or not) from the Pending Activity List.

There are also certain field types that help maintain an up-to-date link between information in your Activity Manager and information in your Contact Manager.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Scheduling_Activities_in_the_Contact_Manager)<<1} Scheduling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Pending_Activity_List)<<1} Pending Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Activity_List)<<1} Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Flipping_to_Activity_Details_Activity_and_Contact_History_Fields)<<1} Flipping to Activity Details: Activity and Contact History Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

## Scheduling Activities in the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

You can schedule activities and To-Dos directly from the Contact Manager without having to open the Activity Manager. You have two options when doing this, you can set single activities, or activities for all contacts in a filter.

Scheduling Single Activities from the Contact Manager
To Set Multiple Activities from the Contact Manager:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1}
Handling Activities in the Contact Manager
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Scheduling Single Activities from the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Scheduling a single activity or To-Do from the Contact Manager gives you all of the options available when scheduling in the Activity Manager, without leaving your contact records. You have the additional option of scheduling a recall in the Contact Manager, which creates an activity with a default type of Call linked to the current contact.

To Schedule an Activity
To Schedule a To-Do
To Set a Recall:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Schedule an Activity from the Contact Manager:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Activity** menu, select **Add an Activity**.

   The Activity dialog box will open. This dialog box is exactly the same as the Activity dialog box that appears in the Activity Manager.

2. Follow the instructions under Scheduling Activities (Phone Calls, Appointments, and Meetings) for help with using this dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# To Schedule a To-Do from the Contact Manager:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Activity** menu, select **Add a To-Do**.

   The To-Do dialog box will open. This dialog box is exactly the same at the To-Do dialog box that appears in the Activity Manager.

2. Follow the instructions under Adding To-Dos for help with using this dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Setting Linked Recalls and Other Activities in the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

When working with your contacts, you may frequently make appointments to call a contact at a certain time. Rather than having to open the Activity Manager to schedule the appointment on your calendar, TeleMagic allows you to set recalls directly from the Contact Manager. Although recalls will probably be the activity type you set most frequently from the Contact Manager, you are able to edit the type to link any type of activity to the contact record.

In addition to scheduling an activity for the current contact, you can also quickly schedule an activity for every contact in a filter. This is very useful for outbound call centers or individuals doing telesales who need to set groups of recalls.

To Set a Single Recall:
To Set Multiple Activities (Recalls) from the Contact Manager:
To Set Multiple Contact Based Recalls (RCL Field):

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

## Setting a Single Recall:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

This will create a linked activity defaulting to the type “Call”.

### To Set a Single Recall:

1. Open the contact record for which you want to set the activity.

2. From the **Activity** menu, select **Set Recall**.

**or** Click the Set Recall icon on the Toolbar.

The Set Activity (Recall) dialog box will open.

The `Description:` field will default to `Call to` and the current contact (based on your key fields).

3. If you are not setting a recall, or if you want to change the default description for any other reason, edit the activity `Description:` as necessary.

The activity duration will default to your Activity Preference setting for `Default activity duration`.

4. Edit the activity `Duration:` as necessary.

5. Enter the activity `Type:` as necessary, or press F2 for a list box of activity types.

6. Select an activity `Priority:` if desired.

7. If you want the item to appear as a To-Do, mark the `To-Do` check box. (The `Call back` section will dim if this is a To-Do.)

8. If this is an activity (rather than a To-Do), type, or use the Date and Time Picker icons to choose a `Call back on` date and a `Call back at` time.

**or** Select the `Call back in` radio button to specify how far in the future you want to set the activity. Type (or use the spinner arrows to select) a number in the `in` text box and choose the appropriate time block from the drop-down list. (For example, Call back in 3 weeks.)

9. If you want to set an alarm for this activity, click the `Alarm` check box, and type an advance warning time in the `Lead Time:` field (or use the spinner arrows to select a time).

10. If you want to assign the activity to another user, choose a user from the `To:` drop-down list. Only those users who have granted you scheduling rights will appear on

the list.

11. Use the `Comments` field to enter any activity or To-Do comments. Use the **Stamp** button to precede your comment with a time, date, and User ID stamp. Use the **Paste Contact Info** button to paste information from the linked contact record into the `Comments` field. (The information pasted into the `Comments` field is based on your Contact Key Fields.)

12. If you want to verify your availability (or the availability of the user to whom you have assigned this activity) at the scheduled time, click **Availability**.

    The Availability dialog box will open.

13. Enter the range of dates on which the activity can be scheduled in the `Between Dates` fields.

**or** Click on the Date Picker icons and select the dates from the Select Date dialog box.

14. Enter the time range during which the activity can be scheduled in the `Between Times` fields.

**or** Click on the Time Picker icons and select the dates from the Select Time dialog box.

• The duration selected in step 3 will be applied to the suggested times entered in the `Between Times` fields. If you choose a range of times other than those suggested, TeleMagic will search for available slots which conform to the duration selected earlier.

15. Mark the **View only available slots** checkbox to limit the display to those periods which are not already scheduled.

16. Click **Search**.

    The search will commence. (Depending on your search criteria, this may take a few seconds to a few minutes.) The window will show the times that the activity can be scheduled. Times which already contain activities will be indicated in red, unless you marked the **View only available slots** checkbox. If this checkbox is marked, slots containing activities will not be shown.

18. Highlight the time slot you want to use.

19. Click **OK** to schedule the activity at that time.

    You will be returned to the Set Activity (Recall) dialog box.

20. When satisfied with your selections, choose **OK**.

    The activity will be added to your schedule (or the schedule of the user to whom it was assigned) at the selected time.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Set_Multiple_Activities_Recalls_from_the_Contact_Manager)<<1} To Set Multiple Activities (Recalls) from the Contact Manager:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Set_Multiple_Contact_Based_Recalls)<<1} To Set Multiple Contact Based Recalls (RCL Field):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# To Set Multiple Activities (Recalls) from the Contact Manager:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Activity** menu, select **Set Multiple Recalls (Activities)**.
2. If you do not have an RCL field in your database, the Set Multiple Activities dialog box will open. Skip to step 4.

**or** If you have a RCL field in your database, the Activity/Recall Type dialog box will open.

3. Select the `Create activities (recalls) in the Activity Manager` radio button.

   The Set Multiple Activities dialog box will open.

4. Select a filter in the `Use this Filter` field. An activity will be created for every contact in that filter.
5. Select an index in the `Use this Index` field. The first activity will be linked to the first contact in the index, and so on.

   The `Activity Type` field will default to `Call` for a recall.

6. If this is not a recall, enter the activity type in the `Activity Type` field, or press F2 for the list box of activity types established in the Activity Manager.
7. Enter the date on which you want the first activity scheduled in the `Start Date` field.
8. Enter how far apart you want the activities scheduled in the `Schedule every` field. This will default to your `Default activity duration` Activity preference.
9. In the `Time Range` area, enter the start and end time of your work day. Activities will be scheduled within that range.
10. If you want to set aside a block of time during the day when activities are not scheduled, such as during your lunch hour, mark the `Exclude this Time Block` check box and enter the start and end times in the `From` and `To` fields.

    An activity will be created for the first contact in the filter on the start date and time. Subsequent activities will be scheduled for each contact in the filter, spaced apart according to the `Schedule every` setting. Activities will be scheduled up until the `End Time` on the first day, then will recommence on the `Start Time` the following day (excluding holidays and weekends). This will continue until all of the necessary activities have been scheduled.

**Example:** If you enter 9/20/99 as the `Start Date`, 30 minutes in `Schedule every`, and a `Time Range` between 8:00 and 5:00, the activity linked to the first record in the filter will be on 9/20/99 at 8:00 a.m. The next activity will be scheduled on 9/20/99 at 8:30 a.m., and so on (excluding the times between the `End Time` and the `Start Time` and the times specified under `Exclude this Time Block`).

11. If you are scheduling the multiple activities for yourself, and want to add an activity for every contact in the filter, skip to step 20.

**or** If you want to assign the activities to one or more other users and/or you want to limit the number of activities that are scheduled, click **Setup Options**.

The Users and Scheduling Options dialog box will open.

The `Available Users` list will include all users who have granted you full access to their activity schedule. The `Create Activities for` list will default to your user name.

12. If you do not want to schedule activities for yourself, highlight your name in the `Create Activities for` list and click **Remove**.

13. Highlight each user for whom you want to create activities and click **Add**. The user will move to the `Create Activities for` list.

14. If you want to only schedule activities for a given number of contacts in the filter, select the `Distribute Fixed Number` radio button and enter the number of activities you want to create for each user.

**or** If you want to schedule activities for every contact in the filter, select `Divide Total Evenly`. If you are scheduling activities for a single user, that user will receive an activity for every contact in the filter. If you are scheduling for multiple users, the activities will be divided evenly between the users.

15. If you want all the selected users to receive an e-mail notification informing them of the assigned activities, select the `Send E-Mail to all users` check box.

16. Click **Analyze** to view a summary of your selections.

The Preview of Distribution of Assigned Activities dialog box will open.

This dialog will list the users who have been selected to receive activities and will give information analyzing how your distribution selections will affect your selected filter. If you have selected to distribute a fixed number of activities, you will be shown the total number of records in the filter, and the number of records that will be left after the selected users receive their allotments. If you have selected to divide the total evenly, you will be given the list of selected users and how many activities each will receive.

17. If you want to print this list, mark the `Print` check box.

18. Click **OK** to close the Preview Distribution of Activities dialog box. If you selected to print the list, it will be sent to the printer.

    You will return to the Users and Scheduling Options dialog box.

19. Make any necessary adjustments to your selections based on the analysis and click **OK**.

    You will return to the Set Multiple Activities dialog box.

20. If you want the selected users to receive an alarm for each activity, mark the `Alarm` check box and enter how soon before the activity time the alarm should go off.

    A field named LCL can be created to keep track of the last time a call is placed to a contact through the TeleMagic Dialer. If you have an LCL field in your database, and have selected `Call` in the `Type` field in step 5, you have the option of emptying the LCL field prior to scheduling the multiple activities. By starting with all records in the filter containing no data in the LCL field, as calls are placed you can create a filter to determine which contacts have not yet received a call. This is particularly useful if you are distributing a fixed number of activities and will need to later isolate the contacts who did not receive an activity. (See the Last Call Field (LCL) topic for information on creating this field if it does not exist.)

21. If you want to delete the current contents of the LCL field for all contacts in the selected filter, mark `Clear LCL Field`.

22. If you do not want to schedule an activity for contacts who have a recent pending activity of the same type, mark `Skip contacts with pending activities after` and enter a date in the date field.

**or** If you want to schedule an activity for these contacts even if they have an existing pending activity of the same type, leave this check box unmarked.

23. When you are satisfied with your selections, click **Schedule**.

The activities will be scheduled. A status bar will appear letting you know the progress.

When it is complete, a Distribution of Assigned Activities dialog box will appear.

24. If you want a printout of this information, click **Print** and click **OK**. The information will be sent to your printer and this dialog will close.

**or** If you do not want a printout of this information, leave **Print** unmarked and click **OK** to close this dialog.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Set_Multiple_Contact_Based_Recalls)<<1} To Set Multiple Contact Based Recalls (RCL Field):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# To Set Multiple Contact Based Recalls:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Make sure you have a field named RCL in your database. (See the Recall Field (RCL) topic for information on creating this field.)

2. From the **Activity** menu, select **Set Multiple Recalls (Activities)**.

   The Activity/Recall Type dialog box will open.

3. Select the `Create recalls using the recall field (RCL) on this level` radio button.

   The Set Multiple Recalls dialog box will open.

4. Under `Use this Filter`, select the filter containing the records for which you want to set a recall.

5. Under `Use this Index`, select an index. The recalls will be scheduled in index order.

6. Enter the date on which you want the first recall scheduled in the `Start Date` field.

7. Enter how far apart you want the recalls scheduled in the `Schedule every` field. (This will default to your `Default activity duration` Activity preference.)

8. In the `Time Range` area, enter the start and end time of your work day. Recalls will be scheduled within that range.

9. If you want to set aside a block of time during the day when recalls are not scheduled, such as during your lunch hour, mark the `Exclude this Time Block` check box and enter the times in the `From` and `To` fields.

   **Example:** If you enter 9/20/99 as the `Start Date`, 30 minutes in `Schedule every`, and a `Time Range` between 8:00 and 5:00, the RCL field for the first record in the filter will be filled in with 9/20/99 8:00. The RCL field in the next record will be filled in with 9/20/99 8:30, the next with 9/20/99 9:00, and so on (excluding the times between the `End Time` and the `Start Time` and the times specified under `Exclude this Time Block`).

10. Under `Schedule for`, select `All Records` if you want to set a recall for every record in the filter.

**or** If you want to limit the number of recalls that are scheduled, select `First` and use the spinner arrows to enter the number of records. The RCL field will be filled in for the specified number of records in the filter and index. (Once the recalls have been completed, you can modify your filter to exclude the records that have already received a recall and schedule for the remaining records, if desired.)

A field named LCL can be created to keep track of the last time a call is placed to a contact through the TeleMagic Dialer. If you have an LCL field in your database, you have the option of emptying the LCL field prior to scheduling the recalls. By starting with all records in the filter containing no data in the LCL field, as calls are placed you can create a filter to determine which contacts have not yet received a call. This is particularly useful if you selected to only schedule recalls for a specific number of records in the filter. (See the Last Call Field (LCL) topic for information on creating this field if it does not exist.)

11. If you want to delete the current contents of the LCL field for all contacts in the selected filter, mark `Clear LCL Field`.

12. If you do not want to schedule an activity for contacts who have a recent or upcoming recall scheduled, mark `Skip contacts with recalls after` check box and enter a date in the date field.

**or** If you want to overwrite the contents of the RCL fields, leave this check box unmarked.

13. Click **Schedule**.

TeleMagic will begin to schedule the activities. A status bar will apprise you of the progress.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Set_Multiple_Activities_Recalls_from_the_Contact_Manager)<<1} To Set Multiple Activities (Recalls) from the Contact Manager:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# Pending Activity List

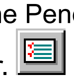
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

The Pending Activity List feature allows you to view, edit, dial from, and add to your list of currently incomplete activities and To-Do's.

## To Access the Pending Activity List:

1. Click **Goto**, then **Pending Activities**.

**or** From the **Activity** menu, select **Pending Activity List**.

**or** Click the Pending Activities button on the System Toolbar. 

The Pending Activity List will open, showing all your incomplete To-Do's and activities in order of due date/time.

2. Browse, add to, or edit your activity list as follows:

- If you want to see your activities in order with the oldest first, select the `Ascending` radio button. If you want to see your activities in order with the most recent first, select the `Descending` radio button.
- Highlight an activity, and click **To Contact** to go to the contact record that is associated with that activity. (If there is no contact record linked to the activity, you will be informed of that fact and returned to the Pending Activity List.)
- Highlight an activity, and click **Notepad** to bring up a window where you can view the contact's Notepad.

  To close this window, press ESC on the keyboard or double-click the control box on the side of the title bar.
- Click **Go To Date** to bring up the Go To Date dialog box. Use the date picker to quickly move through your list of incomplete activities and see those due from a specific date onwards.
- Click **Add** to add an activity. The Activity dialog box will open, allowing you to add activities in the usual manner. (See the Scheduling Activities (Phone Calls, Appointments, and Meetings) topic if you are not sure how to use this dialog box.)
- Highlight an activity or To-Do and click **Edit** to change the details. The Activity or To-Do dialog box will open, allowing you to edit the item in the usual manner. (See the Viewing and Editing Existing Activities and To-Dos for details.)
- Click **Complete** to mark an activity or To-Do as completed. This will immediately remove it from the list of

incomplete activities.

- Click **Delete** to delete an activity or To-Do from your calendar and the list.
- If the activity is linked to a contact you want to call, click on the phone icon at the top of the dialog box corresponding to the number you want to dial. The TeleMagic Dialer will launch. See Placing Calls from the Pending Activity List for details.

3. Click **Close** to close the Pending Activity List.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1}
Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# Flipping to Activity Details: Activity and Contact History Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

If you have activities associated to a contact, and you have activity or activity history fields on a contact page, you can view activities scheduled in the Activity Manager directly from your contact record. There are three ways of viewing activities:   from activity fields, from an activity history rollup, or using the Activity List.

Activity Fields
Activity History Rollup
Activity List

The Activity List is available from every database. The Activity fields and the Activity History Rollup must be added to a database using the Screen Designer. See Activity Fields Tool for help with adding activity fields to a database. See Activity Rollup for help with adding an Activity History Rollup. See Screen Designer for general help with using the Screen Designer. To associate an activity with a contact record, see Associating To-Dos and Scheduled Activities to Contact Records.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# Activity Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Activity fields let you to view the date, time, User ID, and description of activities that have been linked to the current contact directly on a contact screen. The fields may display activities of a specific activity type, or all activity types (depending on how the field was set up in the Screen Designer).

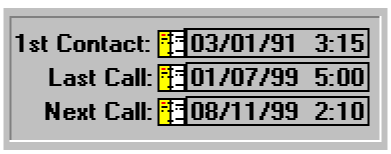
Activity fields fall into one of three categories:

- "First"  will show the first activity linked to the contact that was completed by the current user.

- "Last" will show the most recent activity linked to the contact that was completed by the current user.

- "Next" will show the next pending activity linked to the contact by the current user.

Activity fields appear on your screen preceded by an activity icon:




**Sample Activity Fields**

The amount of data displayed in these fields will depend on the size of the field on the screen. See the Activity Fields Tool topic for help with adding activity fields to a database.

## To Flip to Activity Details Directly from a Field:

- Click the Activity Field icon: ● . (Note that you cannot TAB to this icon.)

  The Activity Manager will open to the associated activity.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

## Activity History Rollup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Manager ï¿½ ï¿½ ï¿½ )<<1}

Activity History (also called Contact History) fields display all events, past or future, scheduled for a contact, no matter who scheduled them. If you have rights to the calendar of the user who scheduled the activity, double-clicking on an activity set by that user will open that activity.

It is possible to filter your Activity History Rollup in the Screen Designer. If a filter has been applied, you may not see all activities. If you want to view all activities, see the Activity List topic.

### To Flip to Activity Details Directly from an Activity History Rollup:

- Double-click the activity history listing for the activity you want to see.
- If have rights to the calendar of the user who scheduled the activity, TeleMagic will open the Activity Manager Day at a Time view, and the Activity dialog box for the associated activity.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# Activity List

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

The Activity List is similar to the Activity History Rollup in that it provides a complete list of all activities linked to a contact. There are, however, two major differences between the Activity List and the Activity History Rollup. First, the Activity List is always available from any database; it does not need to be added as a field to the view. If your view does not have an Activity History Rollup, you can still use the Activity List to get an accurate list of activities linked to a contact. Second, the Activity List offers you more features, including the option of accessing an activity without launching the Activity manager and the ability to add a linked activity directly from the contact record.

To Access the Activity List:
To Go to an Activity from the Activity List:
To Add a Linked Activity from the Activity List:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1} Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

## To Access the Activity List:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

- Click the View Activities button on the Contact Manager Toolbar: •

  The Activity List dialog box will open.

- Use the radio buttons at the top of the screen to determine whether to include complete or incomplete activities, or both, in the list.

  The activities will be listed in either chronological or reverse-chronological order, depending on whether the Ascending or Descending radio button is selected.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Activity_List)<<1} Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

# To Go to an Activity from the Activity List:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Click the View Activities button ( ● ) on the Contact Manager Toolbar to open the Activity List.
2. Use the radio buttons to specify whether the list includes only `Incomplete` activities, `Complete` only, or `Both` (all activities).
3. If you want to launch the Activity Manager and open the associated activity, click **To Activity**. The Activity Manager will open and bring up the related activity.

**or** If you want to edit the activity directly from the Contact Manager, without accessing the Activity Manager, click **Edit**. The related Activity dialog box will open.

4. When you have finished editing the activity, click **Save**.

   The Activity dialog box will close. If you accessed this dialog box using the **To Activity** button, you will be returned to the Activity Manager. If you accessed the Activity dialog box by clicking **Edit**, you will return to the Activity List.
5. Click **Close** to exit the Activity List.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Activity_List)<<1} Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

## To Add a Linked Activity from the Activity List:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

1. Click the View Activities button ( ) on the Contact Manager Toolbar to open the Activity List.

2. Click **Add**.

   The Activity dialog box will open.

3. Add the activity following the guidelines found in the Scheduling Activities (Phone Calls, Appointments, and Meetings) topic.

4. When finished, click **Save**.

   You will be returned to the Activity List dialog box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Activity_List)<<1} Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1} Handling Activities in the Contact Manager

# Closing the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

After working in the Contact Manager, you may find that you have work to do in other areas of the program. It saves memory and increases program speed if you close it before going on to other tasks.

## To Close the Contact Manager:

- From the **Contact Manager** menu, select **Close Contact Manager**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management

# Record Initialization

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

Record initialization is used with Data Synchronization Server to synchronize an entire record. Data Synchronization Server generally performs field level synchronization. This means that only the data from fields that have actually been edited are sent to another installation of TeleMagic when synchronizing. There may be occasions, however, when you want to send an entire record. For example, if you are using filters to control what records an installation of TeleMagic receives, not every record in one installation will necessarily be at another installation. If a change is made to a record that moves it into the filter, with field level synchronization, only the field that was changed will be synchronized. In this case, a record will be added to the other installation of TeleMagic, but it will only contain data in that one field. If this occurs, you must initialize the record at the site where it originally existed to send the rest of the record to the other installation.

## To Perform Record Initialization:

1. From the **Contact Manager** menu, select **Contact Utilities**, **Record Initialization**.

   The Record Initialization dialog box will open. By default, all fields in the current record and its parent record(s) will be synchronized to the site. You may select to additionally include child records and/or linked activities.

2. If you want to include any activities that are linked to the current contact, select the `Linked Activities` check box.

   If the contact record is on Level 1, you have the option of additionally including all associated Level 2 and 3 records. If the record is on Level 2, you have the option of additionally including all Level 3 child records.

3. If you want to include child records, select the appropriate Level check box(es).

4. If you want a count of how many records will be included from each level, select the **Analyze** button.

   The Analyze dialog box will be displayed. This will show how many records will be included from each level and how many activity records will be included.

5. When you are finished reviewing the record count, click **OK**.

   You will be returned to the record initialization dialog box.

6. Click **OK** to create transactions for the specified records.

## Continue…

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## Note for Step 3

If you do not want to open a contact database, choose **No Database**. The Activity Manager will open. (See the Activity Manager topic for help in using the Activity Manager.) Be aware that if you do not open a database, most menu options will be dimmed and will not be available to you and you will not be able to associate your activities with contact records.

## Note for Step 3

For more information on establishing defaults, see the Contact Preferences topic. For more information on views, see the Screen Designer topic.

## Note for Step 4

If the database opens with just a toolbar and a blank page, the Contact Manager is closed. See the The Contact Manager topic for instructions on opening the Contact Manager.

## Note for Step 4

If you do not want to open a contact database, choose **No Database**. The Activity Manager will open. (See the Activity Manager topic for help in using the Activity Manager.) Be aware that if you do not open a database, most menu options will be dimmed and will not be available to you. You will also not be able to associate your activities with contact records.

## Note for Step 4

For more information on establishing defaults, see the Contact Preferences topic. For more information on views, see the Screen Designer topic.

## Note for Step 5

If the database opens with just a toolbar and a blank page, the Contact Manager is closed. See the The Contact Manager topic for instructions on opening the Contact Manager.

## Note for Step 2

The `View:` list will only show views for the level displayed in the `Level` drop-down list.

## Note for Step 2

This list will only show pages for the selected level and view.

## Note for Step 4

Records with no value in a sort field will all be moved to the beginning or end of the record list, depending on whether the index was originally defined as ascending or descending.

## Hint for Step 3

Each record in your database is automatically assigned a unique identifying number called a Contact ID. A Level 2 or Level 3 contact record stores information about its parent in this ID. This information allows TeleMagic to keep track of the relationships between records. When viewing only child records for the current parent, TeleMagic must index on the Contact ID. Because of this, most of your regular indexes will only be available if you are not using the See Only feature. However, when creating indexes, you have the option of creating indexes specifically for use with the See Only feature. If you have created any of these special indexes, they will be available in the `Index` list.

## Note for Step 3

Up to a maximum of 225 fields will appear at any given time in a Contact Manager browse window. When fields are added, you have the option of including them in browse or not. If you do not see a field that exists in your database, either the maximum number of fields is being displayed, or the field was not selected for browse. (See Creating and Defining Fields for more on including and excluding fields from browse.)

## Note for Step 4

In Browse view, memo (notepad) fields and general (OLE) fields are not shown directly, they appear as the words "memo" and "gen" respectively. If there is data in the field, this will be capitalized (i.e., “Memo” and “Gen”). If there is no data, it will be in lowercase.

## Note for Step 4

Up to a maximum of 225 fields will appear at any given time in a Contact Manager browse window. When fields are added, you have the option of including them in browse or not. If you do not see a field that exists in your database, either the maximum number of fields is being displayed, or the field was not selected for browse. (See Creating and Defining Fields for more on including and excluding fields from browse.)

## Note for Step 5

In Browse view, memo (notepad) fields and general (OLE) fields are not shown directly, they appear as the words "memo" and "gen" respectively. If there is data in the field, this will be capitalized (i.e., “Memo” and “Gen”). If there is no data, it will be in lowercase (i.e., “memo” and “gen”).

## Note for Step 3

This field order will not change when you exit Browse view. The fields will continue to display in this order any time you access Browse view for this database. Additionally, if any uses are added in TeleMagic by copying your User ID, they will also see their Browse windows displayed using this field order. (Field order in Browse view is database specific.)

## Hint for Step 6

You can also view all records in a vertical list without splitting the window.

## Note for Step 3

The first three buttons in this dialog box allow you to add records to Level 1, Level 2, and Level 3, respectively. The button titles reflect the names of your database levels.

## Note for Step 4

Level 2 records will have a single parent on Level 1. Level 3 records will have a direct parent on Level 2, and a grandparent on Level 1 (the parent of the associated Level 2 record).

## Note for Step 3

Every page of the record on the current level is copied when you click Copy. None of a record’s OLE objects are copied by this feature.

## Note for Step 2

If you make an error, use the BACKSPACE or DELETE keys to remove the text. Be aware that if you are at the beginning of a field and you backspace, the cursor will move to the previous field. If you continue to backspace, text in that field will be deleted.

## Note for Step 3

If you are entering text into a field that has been set up for use with duplicate record checking, TeleMagic will check to make sure that the same data that you entered in the field does not exist in this field in any other record. If it does, you will receive a warning. (See step 11 under To Create a New Index for more information.)

## Note on Edit Order

Edit order is controlled in the Screen Designer. To change edit order, see the Edit Input Order topic.

## Hint for Step 2

Refer to the Spell Checker topic for information on spell checking your memo field.

## Note for Step 3

It is recommended that you create a file with the extension .TXT. This type of file can be opened in Windows Notepad and can be imported into other memo fields in TeleMagic.

## Note for Step 2

The list will show all memo fields for the current level and higher that have been added to the database, whether or not they appear on any page of the contact view.

## Note for Step 3

The font in use in this dialog box 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 this dialog box.

## Note for Step 1

The font in use in this dialog box 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 this dialog box.

## Note for Step 2

The list will show all memo fields for the current level and higher that have been added to the database, whether or not they appear on any page of the contact view.

## Note for Step 3

The size of this dialog box will reflect the length of the field.

## Note for Step 2

Although fields can be displayed on more than one level, each field actually exists on the level to which it was originally added. When selecting the level for the group replace, you should select the level on which the field actually exists, which is not necessarily the level on which it is displayed.

## Note for Step 5

The text that you place in this dialog box will replace the current text in the chosen field. However, you may want to replace that field's data with the result of an expression. (For example, you may want to replace the User ID in the Account Rep field with the User ID in the Start field for that record.) In this case, you should click the **Advanced** button. The expression builder will open. For help in creating expressions, see the Expression Builder topic.

## Note for Step 5

If you perform a group replace on a check box type field, the text edit region in the Replace Expression dialog box will be replaced with a check box. Mark or unmark the check box as desired.

## Hint for Step 5

You can use group replace to clear all data out of one or more validated fields, leaving them blank.

## Hint for Step 1

You can use the User Monitor feature, available off the **Help** menu to determine if any other users are in the database.

## Note for Step 2

You will be informed if you have changed the template of any unique number field since the last rebuild. Changed fields will not be available until you have run a rebuild.

## Note for Step 3

You may only reset unique numbers from a single contact level at a time.

## Note for Step 4

This option is intended to renumber the field for records that already contain a unique number. Do not select this option if you have just added a unique number field and are generating the unique numbers for existing records (i.e., if the unique number field is blank for those records). If you only reset the counter portion, that is the only part of the number that will be generated for those records. If you have a literal, date, or System ID information in the number, it will be left out.

## Note for Step 6

TeleMagic will count the number of records in your database and compare this information to the counter portion of your unique number field and the selected starting number. For example, if you have 8,000 records in your database, a 4 digit counter portion (allowing up to 9,999 unique numbers), and set your starting number at 5,000, you will run out of unique number at record 4,999. The counter portion will roll over to 0001 and duplicate numbers will be generated. If you are not resetting the date, the varying date information in the fields should ensure that the numbers remain unique even when the counter portion rolls-over. If you are resetting the entire field, all of the dates will be for the current day and you will receive duplicate unique numbers. Consider either setting a smaller starting number, or expanding the counter portion of the unique number template to accommodate more numbers.

## Note for Step 6

Resetting unique numbers will change the numbers already existing in the fields. If you would like to keep the unique numbers already existing in the fields, and simply select a different starting number for new records being added, this may be done at the Edit the Field List dialog box. See the Creating Templates for Unique Number Fields topic for instructions.

## Note for Step 4

If the data that is entered into the field does not appear to match the selected item, it is possible that the format of text you used when creating the list box item is not consistent with the field's template. See the templating option appropriate to your field type under Templated Fields for information on the effects of the `Don't save literal characters with the data` templating option on list box entries.

## Note for Step 1

If this pop-up message does not appear, but an existing list box appears instead, go directly to step 5 for instructions on adding items to the list box. Skip to step 9 for instructions on selecting existing items from the list.

## Note for Step 2

For details on the advanced configuration options available on this screen, see the Advanced List Box Configuration Options topic.

## Hint for Step 3

If you want to use a list box for an existing field rather than adding a new one, see the Use List From Other Field topic.

## Note for Step 6

Avoid using a semi-colon (;) in your entry. If a list box item contains a semi-colon, TeleMagic will assume you want to complete multiple fields with the item. (See the instructions To Complete Multiple Fields with One List Box Item for more details.)

## Hint for Step 6

Consider listing which fields will be filled in from this item.

## Hint for Step 8

It is also possible to run a macro using the semi-colon. For example, you may want to give TeleMagic instructions to clear any existing data in each field before inputting the list box item, or you may want to save the current record and move to the next one when the last field has been completed. Click here for details.

## Note for Step 2

If you change the configuration of a list box, reload the Contact Manager so that all changes can take full effect.

## Note for Step 4

When list box validation is set on you should use extra caution adding a list box entry which exceeds the length of the field. The list box can contain up to 252 characters regardless of the field length. If you select an entry which exceeds the length of the field, in the Contact Manager you will be forced to select another entry; in TeleMagic dialog boxes, the excess characters will be cut off.

## Note for Step 3

When this option is marked, non-supervisor users will see a slightly different list box. The only options will be **Select**, **Close**, and **Help**.

## Note for Step 4

Only fields of a compatible type will be available. For example, you will not be able to use a list box for a character field on a date field.

## Note for Step 4

It is recommended that you only select a carriage-return delimited ASCII file. (These will generally have the file extension .TXT.)   Selecting any other file type could have unpredictable results.

## Note for Step 3

CTRL+C is a standard Windows command used to temporarily store objects in the clipboard. The program you are using may or may not recognize this command. If you are not familiar with selecting and copying items in the program you are using, refer to the documentation that accompanied the program for instructions.

## Note on Embedded Objects

If you change the source file for an embedded object, the object in the OLE field will not be changed.

## Note on Sound Objects

You will not be able to edit a sound object directly from TeleMagic. If you want to edit a sound object, you must do so from the Windows Sound Recorder.

## Hint for Step 2

Instead of selecting the entire file, you can select just a portion of the data. For example, in an Excel spreadsheet, you can select a single cell of data. Although only the selected portion will be displayed from within TeleMagic, you will still be able to access the entire file from TeleMagic for editing.

## Note for Step 2

CTRL+C is a standard Windows command used to temporarily store objects in the clipboard. The program you are using may or may not recognize this command. If you are not familiar with selecting and copying items in the program you are using, refer to the documentation that accompanied the program for instructions.

## Note for Step 6

If **Paste Link** is disabled, go back to the file and copy again.

## Note for Step 2

If the sound does not play, you do not have an installed sound driver. Contact Microsoft or your Windows representative for an update to the Windows sound driver.

## Note for Step 5

If you do not save changes to the source file, or if you do not close the OLE window before you close the source file, a warning box will appear informing you that a link to the object exists and asking if you would like to close anyway. If you have saved changes to the source file, choose **OK**. If you have not saved changes, choose **Cancel**. If you choose **OK**, the changes will not be updated in the OLE field.

## Hint for Step 6

You can copy-and-paste text from any Windows application into a Notebook record. Simply copy the text to the clipboard in the source application, place the cursor in the text area of a Notebook record, then select **Edit**, **Paste** from the TeleMagic Main menu, or press CTRL+V. The text will appear in the Notebook. Some formatting may be lost. Alternatively, you can import any file with a .TXT extension by placing your cursor in the text region and pressing ALT+**I**. See To Import a Text File into a Memo Field for more information.

## Hint for Relational Databases

You do not have to use TeleMagic's powerful relational capability. If you want, you can store all your information at a single level.

## Hint for Add Note Button

There is a security setting that allows users who have rights to view a memo field, but not edit existing notes, to use this option to add notes to a memo field. See steps 8 and 9 under the heading *To Add Database Security and Visibility Rules to a Security Group* in the *Security* chapter of the *System Administrator Guide* for more information.

# Hint for Running a Macro from a List Box

You can use the same basic principles when writing macros for list box items as you do when creating function keys. For help with writing a macro, see the Function Key Setup topic.

## Hint for List Box Validation

You can add a blank entry to a list box, thus allowing a validated field to remain empty. This is useful when you do not yet have the correct information to place in a field, but want to save other information in the record.

## Hint for Sorting List Box Items

If you know which list box items are likely to be used the most often, you can leave the list in as-added order and add the frequently used items to the list box first. They will be available at the top of the list for quick selection.

## Note for Printing List Box Items

This option will print the items in the current list box only. If you want to print for multiple list boxes, select **List Box Report** from the **Reports** menu. See the List Box Report topic for details.

## Hint for Field Search

Creating filters is subject to group security rights. If you do not have access to creating filters, you can use the Field Search feature to filter records.

This feature can be used if you want to find a set of records on a one-time-only or temporary basis. If you want to create a filter that you will use frequently, follow the instructions under To Create a Filter.

## Note for Step 1

You must have at least one index in the current database defined to check for duplicate records to proceed. See To Create a New Index to define a new index with duplicate record checking, or modify an existing one.

## Note for Step 2

Normally, OLE objects are copied to the clipboard by selecting them and pressing CTRL C. This may not be true in all applications. Also, most applications allow selecting objects using menus. See your applications documentation for more information on copying objects to the clipboard.

## Note for Step 13

The Maintain Position feature is applied when you move from record to record. When you select Maintain Position and then open a browse window, the current record will be displayed in its current position in the database.

## Note for the Tagged Records Filter

This filter may not exist. This filter is not automatically created. So, if you are working in a new database, you may need to create this filter first.

## Note for Step 2

If any records have been deleted since the last rebuild, they will be included in the count. To count only records that have not been deleted, you must perform a rebuild. Also note that deleted records will be generated if you start to add a record using Quick Add, but cancel.

## Note for Step 7

It is possible to enter something in the `Description`: field without entering anything in the `Item`: field. This allows you to have a validated list box with “blank” as a valid option. The description can be used, for example, to indicate when it is appropriate for the field to be blank.

## Note for Step 6

The available comparisons are mostly self-explanatory, but when using “Is In” the comparison is made to the entire field, including spaces. For example, if you were searching the Business Type field for the word “RETAIL” and this field was 9 characters long (enough to accommodate “WHOLESALE”), you would need to add 3 spaces to “retail” to be able to find it. You can also search for multiple items by separating them with commas (e.g. RETAIL,WHOLESALE). However, since “RETAIL” in this case is shorter than the field, it would not be found unless you added 3 spaces to it. In cases where you need to find search strings of different lengths, it is usually easier to create an advanced filter where you can use one of the TRIM() functions to ignore spaces.

# The Edit the Field List Dialog Box

### Database Level Radio Buttons

Use these radio buttons to choose a database level. The field list will display all existing fields for that database level.

### Field List

List of all existing fields on the level selected with the Level radio buttons. Select fields for editing from this list. You can also use this list to verify that the prospective prompt and field name for a new field have not already been used.

### Add

Choose **Add** to add a new field. The right side of the dialog box will become active.

### Change

Choose **Change** to change the highlighted field. The right side of the dialog box will become active.

### Delete

Choose **Delete** to delete the highlighted field. (Before choosing this option, see the Deleting Fields topic.)

### Set Calculation Order

If you have at least two calculated fields, selecting this opens the Calculation Order dialog box where you can set the order in which calculated fields are analyzed and filled in. (Click here for details.)

### Prompt

In the `Prompt` field, type a field prompt exactly as you want it to appear on the field list. The field prompt is a plain English description of the field contents. It should be clear, simple, and easy to understand. TeleMagic can display the field prompt as a field label on contact screens. The field prompt must be unique for the database.

### Field name

You must type a unique field name here when creating a field. A field name can contain no more than ten alphanumeric characters. It cannot contain special characters or spaces and the first character must be a letter.

### Type

Choose what type of field this is from the drop-down list. Different field types are used for different purposes in TeleMagic. (Click here for more information on available field types.)

### Length

Type or select a how many characters long you would like this field. The field must be long enough to accommodate the maximum total number of characters you are likely to type into that field. TeleMagic will not save excess characters.

TeleMagic will display a default field length based on the selected field type. If you have selected OLE, Check Box, Memo, or Date as the field type, a pre-set field length that cannot be changed will appear in the `Length` field.

### Dec.

If you have selected Number as the field type, you can decide if you would like to reserve some of the field's length for decimals. Select how many decimal places to use in the `Dec. Places` field. The number of decimal places must be no longer than the total field length.

If you want your number field to display only whole numbers, select or type 0 in this field.

### Template

Templates can prevent data entry errors and save keystrokes. You use them to pre-determine the layout and character types for fields that contain highly-structured data.

You can create templates for Character, Number, Unique Number, Fax, or Phone fields only.

The dialog box that appears when you click this button depends on the field type.

### Auto Capitalization

If this field will contain data that should always be capitalized, such as proper nouns, this check box allows you to have TeleMagic automatically capitalize any entry in the field for you.

### Include in Merge

This option allows you to decide if you would like the field included in the merge field list accessed when creating a document for mail merge or faxing.

### Include in Browse

This check box allows you to decide if you would like the field to be included in the Browse view. There is a maximum number of fields that can be included in Browse. If you have a large number of fields in your database, you should only include those you are apt to want to see in a Browse window.

### Currency Field

Use this check box if you want to use a currency symbol with the field. The currency symbol set up in Database preferences will be used by default. (To set the default currency symbol, see the Database Preferences: Currency Symbol topic.)

### Use custom settings

Mark this check box to use a different currency symbol for this particular field.

### Currency Symbol

If you have checked `Use Custom Settings`, enter the currency symbol you want to use into this field.

**Hint**

If you do not know the keyboard command for a foreign currency symbol, copy it to the Windows clipboard from the Windows Character Map program in the Windows Accessories Program Group. Then use CTRL+V to paste it into the `Currency Symbol` field.

### Position

If you have selected a default currency symbol, use this option to select whether you would like it to be displayed to the left or right of the number.

## Calculated or Validated Field?

Calculated fields are automatically filled in based on data from another field or a variable. If you want this field to display entries such as sales totals or future dates, select the `Calculated` radio button. Calculated fields are calculated and filled in whenever the data upon which they are based changes. You cannot type over or otherwise manually change calculated fields. See Calculated Fields for details.

Validated fields are a means used to ensure that entries made into a field conform to certain pre-determined standards. This is especially important for fields you use to locate, sort, report on, or categorize records. Select the `Validated` radio button if you would like to enter an expression that must be true for data to be accepted in the field. See Field Validation for details.

## Expression

If you have chosen to have a calculated value in this field, or to validate this field based on an expression, click this button to open the Expression Builder dialog box where you can build the expression needed for the field. (See the Expression Builder topic for help with building expressions.)

## Default Value

A default value field allows you to create an expression that TeleMagic will use to automatically fill in the field when a record is added. This is similar to a calculated field, except that the value is offered at the time the record is first added, but isn't updated if the value changes. Also, unlike a calculated field, the default value is just given as a suggestion; you can change it at any time. Click the **Default** button to open the Expression Builder where you can create an expression to define the default value. (You will not be able to enter a default value if the field is calculated.)   See Default Fields for details.

When you click ESC while in edit mode on this dialog box, edit mode will close but the dialog box will remain open. Clicking ESC a second time will close the dialog box.

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proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE2_Creating_and_Defining_Fields)<<1}

# Available Field Types

- Character fields can contain any type of data you like. This will probably be your most common field type.

- Date fields can only contain actual dates.

- Number fields can only contain real numbers. You will not be able to type letters into a number field.

- Memo fields allow you to enter any amount of information in a scrolling window. You can enter letters, numbers, special characters, and spaces into a memo field.

- Check Box fields display on the screen as a box that may be marked or left unmarked (similar to the check boxes available on TeleMagic dialog boxes). In reporting, these are logical fields that return a "Yes" if the box is marked, or "No" if it is not marked.

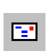
- Phone fields are designed to contain phone numbers. Phone fields will be referenced when using the Dialer feature. The contents will appear in the Dialer dialog box and the field will be preceded in the Contact Manager by a phone icon:
.

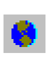
- Fax fields are designed to contain fax numbers and are used with the Fax feature. They will be preceded in the Contact Manager by a fax icon:
.

- Pager fields contain pager numbers. When you click on the pager icon
 the Wireless Messaging dialog box will open.

- Unique Number fields are designed to contain an automatically generated unique number. For example, you may have a page designed to create an invoice. A unique number field may be used to generate the invoice numbers.

- OLE - General fields hold pictures, sounds, charts, graphs, animations, and other objects created in other programs.

- E-mail Address fields contain e-mail addresses. When you click the e-mail icon

your default e-mail client will open.

- Web Address fields contain website addresses. When you click on the web address icon
 your default web browser, as set up in Windows, will open to the site indicated.

- FTP Address fields contain addresses for file transfer protocol (FTP) addresses. When you click on the FTP icon
 your default FTP client, as set up in Windows, will open to the site indicated.

- `Newsgroup` fields contain addresses for newsgroups. When you click the newsgroup icon

 the application you use by default to retrieve newsgroup information, as set up in Windows, will open and retrieve the indicated information.

### More About…

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_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Pre_defined_Fields)<<1} Pre-defined Fields

# The Unique Number Template Dialog Box

Use the check boxes in this dialog box to build a unique number, one section at a time. You can make various date-related information appear as part of the unique number, or you could simply have an auto-incrementing unique number appear in this field. If you uncheck a marked check box, it will remove that item from the unique number.

### Example

As you build the unique number, it will appear in this text box.

### Unique Number Counter

Use this check box to place the counter into the unique number. The counter portion is the part of the unique number that will increment by 1 for each new record added.

### No. of digits

Select the number of digits that should be used for the counter portion.

### System ID

This will add the System ID of the local installation to your unique number. (If you are using Data Synchronization, entering the System ID is required if you want to keep your unique numbers unique among sites.)

### Starting Number

If you do not want to start the unique number counter with 1, enter the desired starting number.

### Literal

This makes an unchanging string of characters part of the unique number.

### Century

This adds the current century to the unique number.

### Year

This makes the current year part of the unique number.

### Month Number

This makes the number of the current month part of the unique number. For example, January is 01, February is 02, etc.

### Month Name

This makes an abbreviation of the current month's name part of the unique number.

### Day of Month

This makes the current date part of the unique number.

### Day of Week

This makes the current day part of the unique number.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templates_for_Unique_Number_Fields)<<1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields>third)<<1} Creating and Defining Fields

# The Phone Template Dialog Box

### Input Mask
Enter the template you would like to use for this phone field in this field.

### Default US Phone
Click this button to use the default phone template for numbers in the United States and Canada.

### Default Intl Phone
Click this button to use the default phone template for international numbers.

### Input Mask Symbols
Use the Input Mask symbols to stand in for characters of data that may be entered in the field at the position occupied by the mask character.

A indicates that only letters are allowed in this position.
X indicates that any character is allowed in this position.
9 stands as a place holder for digits.
# stands as a place holder for digits, signs (+ and -), and spaces.
N allows either letters or digits in this position, but nothing else.
! allows any character, but displays everything entered in this position in uppercase.

### Letters Only
Indicates that only letters are allowed in the entire field.

### Center
Centers all data in the field.

### Right Align
Will override the default left alignment of the field, and cause all data to be right aligned.

### Uppercase
Forces all letters in the field into uppercase.

### Select the Field on Entry
Will cause the entire field to be selected when you tab to it.

### Trim Beginning and Ending Spaces
Will clear the field of any unwanted spaces at the beginning or end of the field.

### Don't save literal characters with the data
Will cause any literal characters you enter to just be part of the field template, not the actual data. Unmarking this will cause literal characters to be viewed as data. (Click here for important information and cautions when using this option.)

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1
} Creating Templates for Phone Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields>third)<<1} Creating and Defining Fields

## Don't Save Literal Characters with the Data

When creating a field's template, your choice for this option can be extremely important. When you create a template for a field, you can have text or symbols--the literal characters--always appear as part of the field. It is important to know whether this information is a part of the field contents (the data), or just used to control the way you would like the field to look. For example, you may have a phone field designed to contain international numbers. Rather than having to enter the international access code 011 into every field, you can have it as part of the field's template. In this case, it is part of the actual data in the field. On the other hand, you may or may not consider literal characters such as the dashes and parentheses in phone fields part of the data. In this case, with this check box marked, although a phone field would display as: (619) 555-1465, TeleMagic would only actually store 6195551465. This option can save disk space, especially in large databases, by not taking up storage space for non-data characters. The tradeoff, however, is that the actual data would not include the literals, thus it would not display as formatted in browse, merge, and reports. Be especially careful when selecting this option for phone fields, as any literals would not be included when dialing, faxing, and sending wireless messages.

**Note**

Be aware that marking this instructs TeleMagic that the literal characters are not included in the data, so it should add them to the display. If you enter data from either list boxes or on group replace with this option selected, make sure that you do *not* include the literal characters in the entry. For example, if you enter (619) 555-1465 in a phone field with this option marked, TeleMagic will know to put in the first parenthesis as the literal, then it will begin to enter your data, in this case, another parenthesis. The final entry would be ((61) 9)5-55-1. (This would, however, display correctly in browse and merge fields.)

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

# The Number Template Dialog Box

### Input Mask
Enter the template you would like to use for this number field in this field.

### Input Mask Characters
The input mask symbols are used as follows:

**.** indicates the position of the decimal point.

**,** shows where larger numbers should be separated by a comma.

9 stands as a place holder for digits and/or signs (+ and -)

# stands as a place holder for digits, signs (+ and -), and spaces.

**Note**
You cannot use non-numeric place holders in number field templates.

### Left Justify
Will override the default right justification of the field.

### Blank if Zero
Will leave the field blank if no number has been entered into it, or if the number entered is zero.

### Use Leading Zeros
Will cause any unfilled digits in the field to appear as zeros. For example, if the field has a length of five characters, and the number currently in it is 26, it will display as follows: 00026

### Select the Field on Entry
Will cause the entire field to be selected when you tab to it.

### Scientific Notation
Can be used to handle extremely large numbers. For example, it will change 10 million to .10000E+8.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1
} Creating Templates for Number Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

# The Character Template Dialog Box

### Input Mask
Enter the template you would like to use for this character field in this field.

### Input Mask Characters
The input mask symbols are used as follows:
A indicates that only letters are allowed in this position.
9 stands as a place holder for digits.
N allows either letters or digits in this position, but nothing else.
X indicates that any character is allowed in this position.
# stands as a place holder for digits, signs (+ and -), and spaces.
! allows any character, but displays everything entered in this position in uppercase.

### Letters Only
Indicates that only letters are allowed in the entire field.

### Center
Centers all data in the field.

### Right Align
Will override the default left alignment of the field, and cause all data to be right aligned.

### Uppercase
Forces all letters in the field into uppercase.

### Select the Field on Entry
Will cause the entire field to be selected when you tab to it.

### Trim Beginning and Ending Spaces
Will clear the field of any unwanted spaces at the beginning or end of the field.

### Don't save literal characters with the data
Will cause any literal characters you enter to just be part of the field template, not the actual data. Unmarking this will cause literal characters to be viewed as data. (Click here for important information and cautions when using this option.)

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Character_Fields)<<1} Creating Templates for Character Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields>third)<<1} Creating and Defining Fields

# The Export Format Dialog Box

## Export Format Name

Type a description of the format in the `Export format name` field. TeleMagic will add this name to the Export Format selection box for future use.

## Output File Name

Type the complete path and a new file name for your exported records in this field.

**Hint**

Choose an extension for the file name that is accepted by your target program. Many programs decide on the format of a file by its extension. You may need to change the extension of the file so the target program will accept the file as the proper format.

## Export From

If you are using the TeleMagic for Windows export format, select Contact Data for contact database records or Activities for Activity Manager records from this list.

If you are using any other format, select Activities for Activity Manager records, or the name of a database level to export records from that level and its parent level(s).

## Index

If you have selected any other export format that TeleMagic for Windows, you can select an index. If you do not care in what order the records are sorted after export, select None.

Remember that your target program can probably re-sort the data after it is imported there, so your decision is not critical.

## Filter

If you only want to export a particular set of records in your database, select the filter you want to use to limit the records to be exported. The list will contain all filters already associated with this database. If you want to export all records, choose None - All records available.

## Export File Type

Select a file format from the Destination File Formats:

- TeleMagic for Windows
  If what you are exporting will be re-imported by a TeleMagic for Windows database, choose `TeleMagic for Windows` format.

- dBase III+
  If what you are exporting will be re-imported by a program that uses the .DBF format (for example, TeleMagic for DOS), choose `dBase III+`.

- SDF and Delimited Formats
  When an exported file is later re-imported into another program, that program needs to know

where one field of data ends and another begins. Two ways of accomplishing this are by using delimiters or Standard Data Format.

A delimiter is a special character used to mark the end of a field. When the delimiter character is encountered by the application into which you are importing, that application will know that the delimiter is not part of the data, but rather a marker between fields. Most word processors can read comma delimited files. Most spreadsheets can read tab delimited files. Check the documentation for the program into which you will be importing your exported file to confirm what type of delimiter your program will recognize.

In delimited format, any spaces at the end of a field are cut off, and only the data is exported. Standard Data Format (SDF), on the other hand, exports the entire field with the trailing spaces. When the file is later imported into another application, fields are separated by the field length.

If your destination program does not recognize the Standard Data Format, and requires a delimiter other than a comma or tab, select `Delimited (user defined)`.

## Options

If you are exporting from TeleMagic for Windows you can click the **Options** button to select the type of activities you want to include in your export. For more information on including activities when exporting see the Creating a TeleMagic for Windows Export Format topic.

## User Defined Delimiter

If you have selected `Delimited (user defined)`, type the delimiter you would like to use into the `User defined Delimiter` field.

Make sure you use a delimiter that will not appear in the output data, and that the target program will accept and recognize the delimiter. If you use a character that does appear in the exported records, the target program will count that character as another delimiter. This means that records could suddenly slip, and have part of one record jump to another. If this appears to happen, try re-exporting with a different delimiter. (You should not use a quote as a delimiter.)

## Select Fields

Even if you have chosen to export all records in a database, you must define which fields within each record are to be included in the export format. To do this, choose **Select Fields**. The Choose Fields to Export dialog box will open.

## Assign Fields

dBase is the only export format that requires fields have unique field name assignments. TeleMagic will automatically assign field names based on the fields' current names. If you are notified that you have duplicate field names, or if you want to adjust field name assignments, choose **Assign Fields**. The Export-Assign Output Field Names dialog box will appear.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM2_Creating_an_Import_Format)<<1}

# The Rebuild Dialog Box

### Start Now / Delay Until

If you want to have the rebuild begin immediately upon your clicking the **OK** button, select the `Start Now` radio button. If you want to delay the start of the rebuild, select the `Delay Until` radio button and choose a `Start Time` and `Start Date`.

### Start Time / Start Date

Enter the time you want the rebuild to begin in the `Start Time` field, using your default time format. If the date you enter in the Start Date field is the current date and the time you enter in this field has already passed, the rebuild will start as soon as you click **OK**.

Enter the date you want the rebuild to begin in the `Start Date` field, using your default date format. If you enter a date that has already passed, the rebuild will start as soon as you click **OK.**

Leave these fields empty if you want the rebuild to begin as soon as you click **OK**.

### On Completion

This section controls what should occur automatically when the rebuild is completed.

### Run Rebuild Report

If you would like to create a printed report on the results of your rebuild, mark this check box. This report will print automatically to your default printer.

### Print Full Report / Print Errors Only

You have the choice of printing a full report that includes information on everything that was rebuilt; or printing a report that only includes any errors that the rebuild encountered.

### Quit TeleMagic

Select this if you would like TeleMagic to automatically shut down after rebuild.

### System

Marking this will ensure that all system files are rebuilt. This includes the core files needed to run TeleMagic.

### Database

Marking this will ensure that your database selection(s) are rebuilt. By default, TeleMagic will perform a full rebuild for the current database only.

If you want to add other databases to the rebuild list, click the **Database** button. The Database Files dialog box will open.

### Global

Marking this will ensure that your global selection(s) are rebuilt. Global files include your database list and your security data. By default, both will be rebuilt. To edit the selections, click the **Global** button to open the Global Files dialog box.

## User Tables

This rebuilds files specific to your User ID. The User Files Dialog Box will open when you click the **User** button.

**Note**

Only the files for your User ID will be included. To rebuild all users, you must run an external rebuild using the /R parameter. See the *System Administrator Guide* for details.

## Floating

Floating files are files that are related to a database, but are not stored with the database. Marking this will ensure that your floating file selection(s) are rebuilt. The Floating Files Dialog Box will open when you click the **Floating** button.

## DSS Tables

DSS tables are used in synchronization. This option is not available if you do not have Data Synchronization Server installed. You can also rebuild DSS tables from Data Synchronization Server. When rebuilding from DSS, you have additional options available. Rebuilding from TeleMagic will perform a default rebuild. The DSS Tables dialog box opens when you click on the **DSS Tables** button.

## Automation Server Tables

Automation Server Tables are associated with the TeleMagic Automation Server. You can rebuild these tables from the TeleMagic Automation Server. When you rebuild them from TeleMagic, a default rebuild is performed. There are additional rebuild options available from Automation Server.

## Reindex / Pack and Reindex

You may choose to just reindex TeleMagic, or to pack and reindex.

During re-indexing, TeleMagic sorts and re-numbers all records according to your designated display order(s). Whenever you have added or deleted more than 10% of your records, re-indexing will significantly improve processing speed.

During packing, TeleMagic permanently removes all records marked for deletion, so that the database occupies the least possible storage area. Whenever you have deleted more than 10% of your records, packing will significantly improve processing speed.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Rebuilding_Data_Rebuild)<<1} Rebuilding Data

# The Change Password Dialog Box For Supervisor Users

This dialog box allows you to add or change your current password. This is the dialog box used for users who are members of the Supervisor security group and does not require that you know the existing password before proceeding. (Non-supervisor users are required to know the existing password before being allowed to alter it.)

## Enter New Password

Type the new password you want to use.

## Confirm New Password

Re-type the new password, making sure to type it exactly as you did above.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_Changing_Passwords)<<1}

# The User Groups Dialog Box

## User Group

This drop-down list shows all of the user groups in the installation.

## Add

Click this button to add a new user group.

## Edit

To change the name of an existing user group, select the group you want to change from the `User Group` list and click **Edit**.

## Delete / Cancel

When you are not adding or editing a group, this button will read Delete. To delete a user group, select the group from the `User Group` list and click **Delete**. You will receive a confirmation message.

When you are adding or editing a group, this button will read **Cancel**. Click this to discard your current edits.

## Close/Save

When you are adding or editing a user group, this button will read **Save** and allow you to save your changes.

When you are not in edit mode, this will button will read **Close** and allow you to close this dialog box.

## Users not in group

This list shows all users who are not members of the user group currently displayed in the `User Group` field.

## Add / Add all / Remove / Remove all

Use these buttons to move users into or out of the group. **Add** will include the user highlighted in the `Users not in group` list in the group. **Add all** will include all users. **Remove** will exclude the user highlighted in the `Users in group` list. **Remove all** will exclude all users from the group.

## Users in group

This list shows all users who are members of the user group currently displayed in the `User Group` field.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½USERGRP_To_Add_a_User_Group)<<1}

# The Activity Access For (Username) Dialog Box

### Users with No Access

This list shows names of all TeleMagic users who have not yet been given access to your calendar.

### Add / Add All

To give any user access to your calendar, highlight his or her name in the list on the left and click the **Add** button. To give all users access to your calendar, click the **Add All** button. Any user added will have the default rights to your calendar. You can change any user's rights to your calendar using the `Set Activity Permission` for options.

### Remove / Remove All

To deny a user rights to your calendar who is currently in the `Users With Access` list, highlight his or her name in the list on the right and click the **Remove** button. To remove all users' access to your calendar, click the **Remove All** button.

### Users With Access

This is a listing of users who already have been given access to your calendar.

### Set Activity Permission for

When you have highlighted an individual who is listed in the `Users With Access` list, the name appears in the `Set Activity Permission` for field. You can then adjust the type of access the individual will have to your calendar.

### View Time Blocks Only

If the user appearing in the `Set Activity Permissions` for field should be able to see the times when you are and are not available, but should not be able to view any other details or alter your calendar in any way, select this option.

### View Full Details

If the user appearing in the `Set Activity Permissions` for field should be able to see details on the activities appearing on your schedule, but should not be able to alter your calendar in any way, select this option.

### Full Access (View, Schedule, Edit)

If the user appearing in the `Set Activity Permissions` for field should be able to fully view your calendar, assign you activities, and edit your existing activities, select this option.

### Set Default

Click this button to change the default settings for users who will be given access to your calendar.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Controlling_Others_Access_to_Your_Calendar)<
<1}

# The Default Access Permissions Dialog Box

By default, any users to whom you grant access can view only the blocks of times on your calendar during which you have scheduled activities. They cannot see full appointment details, and they cannot add to or change your schedule. If you usually grant a different level of access, you can set that default here.

## View Time Blocks Only

View Time Blocks Only means that a user can see your calendar, but no details on your scheduled activities and To-Dos will be available. This will allow users to see when you are not free, but not why you are not free. Users also will not be able to schedule any items for you or edit your existing items.

## View Full Details

View Full Details means that a user can see your calendar, including detailed information on your scheduled activities and To-Dos. Users will not, however, be able to schedule items for you or edit your existing items.

## Full Access

Full Access means that a user can work in your calendar without restriction. Users will be able to see full details of your calendar, edit any existing items, and can schedule new items for you.

## Set Default

Clicking this button will set whichever radio button selected as the default and return you to the Activity Access for (Username) dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Controlling_Others_Access_to_Your_Calendar)<
<1}

# The Activity Archive Dialog Box

While deleting one activity at a time is the best way for most users to deal with obsolete activities on a day-to-day basis, sometimes you will need to delete groups of activities. The Activity Archive feature removes selected activities to a file, which can then be deleted. A supervisor user can use this feature, for example, to delete all completed activities, or to archive all activities assigned to a user who has left your company. Additionally, all can use the feature to archive a set of their own activities. (While a supervisor user can archive activities for other users, every other user in the system has access only to his or her own activities.)   These archives can be re-imported at a later date if desired.

**Note**

You cannot archive extended activities (those that span over more than one day). Also, should you ever re-import your archived activities, comments, contact links, and alarms will not be included and any recurring activities will lose their association with each other.

## Date From / Date To

If you want to only archive activities that fall within a certain date span, enter the range of dates in these fields. If you want to archive all activities from a certain date on, enter the date in the `Date From` field, but leave the `Date To` field blank. If you want to archive all activities up to a certain date, leave `Date From` blank, but enter a date in the `Date To` field. If you do not want to filter by date, leave both fields blank.

## User

If you are a supervisor user, choose the name of the user whose activities you want to delete, or choose All if you want to remove all users' activities. (Users must store their activities in the same path as you to be included.)

**Note**

A supervisor user does not need to have been given access to other users' calendars in order to archive their activities. If you are not a supervisor user, you will only be able to archive your own activities.

## Type

Specify whether you want only activities of a certain type to be deleted, or whether you want all activity types to be considered. If there is a list box attached to the `Type` field in the Activity dialog box, this list will be populated with the contents of that list box. If there is not, this list will include some common activity types.

## All Activities / Complete Only / Incomplete Only

Use these radio buttons to specify whether you want completed activities, pending activities, or both (all activities) to be deleted.

## Archive Method

If you have exclusive use of the TeleMagic installation and the activity tables, select `Fast`. If there are other users logged into TeleMagic, or if you are not sure, select `Multi-User`.

## If archive file already exists

If there is already a file containing TeleMagic activities in the directory to which you are archiving, do you want to overwrite the existing file (replace it with these new activities), or should this new information be appended to the end of the existing file?

## Do not archive Document/Fax-related activities

Activities with the type Letter and LetterFax are created by TeleMagic when you print or fax a document for a contact. (These activities do not appear on your calendar.) They are also used to generate the Document History which is a list of every document sent to a contact. To maintain an accurate history, it is recommended that you do not archive document and fax related activities. If you do not care about the history, unmark this check box to archive these activities with the rest. (If you have selected Letter or LetterFax in the `Type` field, this check box will be unavailable.)

## Do not archive Contact-related activities

If you do not want activities that are linked to contacts archived, mark this check box. Retaining these activities allows you to keep an accurate history of activities associated with any contact. If you do not need to retain a history of these activities, unmark this check box.

## Archive to

Enter the path to the directory where you would like the archive files created. (Do not enter a file name.) TeleMagic will create two files named TMACTARC.DBF and TMACTCMT.DBF in the specified path. Click the **Find** button to browse for the destination directory.

## Archive

Click this button to begin archiving the specified activities and To-Dos.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND2_Archiving_Activities)<<1}

# The Simple Expression Dialog Box

## Field

From the `Fields` list, select the field you want to use to select records. For example, if you wanted to filter on records in California, you would select the State field.

## Compares

From the `Compares` list, pick the appropriate comparison. Using the above example, the data in the State field should equal California, so you would pick the Equal comparison.

## To

In the `To` text box, type the information you will use to select records. In the above example, this would be "CA."

> **Note**
>
> If you are using this dialog box to create a filter to search for empty fields (such as when looking for records with no phone numbers), use the .EMPTY variable. (Type .EMPTY in the `To` field.) This is only used for fields with no data. If you want to use the value of zero (0) in reference to the contents of a numeric field, you will have to create an expression using the **Advanced** button.

## AND/OR

If you are creating an expression with more than one criterion, TAB to the `And/Or` field and type A for AND or O for OR. AND means that both the preceding and the following criteria must be true; OR means that either the preceding or the following criterion should be true.

**Examples:**

Using Account Rep Equal JRC AND State Equal CA will create a filter which pulls all of the records in California whose account rep is JRC.

Using Account Rep Equal JRC OR State Equal CA will create a filter which pulls all of the records whose account rep is JRC, as well as all the records in California.

## Advanced

Click this to create a more complex expression using the standard TeleMagic Expression Builder. Once you have elected to make a filter an advanced filter, it cannot revert to a simple filter.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Creating_Filters)<<1}

# The (Add or Change) Index Dialog Box

The level you selected when initially adding the index is shown on the title bar of this dialog box.

## Index Name

Enter a descriptive name for the index.

## Index Filter

Filtered indexes are special indexes that have a built in filter. When working in large databases, this can significantly optimize TeleMagic. When using a filtered index, you will only be able to work with records in that filter when the index is selected. If you would like to create a filtered index, select the filter from the `Index Filter` list.

## Edit

Click **Edit** to open the standard TeleMagic Expression Builder. You can create a simple index by selecting a single field on which you want to sort, or a more advanced index using TeleMagic expressions. (See the Expression Builder topic for help with building expressions.) When the index expression has been created, it will appear in the `Index Expression` window.

## Case Sensitive

If you would like your index to recognize upper-case and lower-case characters, mark the `Case Sensitive` check box. If this is marked, the index will place all of the records containing an upper-case character at the start of the selected field at the top of the index, followed by all of the records with lower-case characters at the start of the selected field. (i.e., A - Z, a - z.) This is useful if you want to do further sorting by case. A case sensitive check will also be applied when you are searching for a record based on the data in the index field. If you want records to be sorted alphabetically, regardless of case (i.e., Aa - Zz), unmark the `Case Sensitive` check box.

**Note**

When creating index expressions, an UPPER() statement is automatically added to your expression if you do not choose `Case Sensitive`. This instructs TeleMagic to not pay attention to case by viewing everything in the field as uppercase.

## Check Duplicate

Duplicate record checking is used to prevent users from adding the same record more than once. If the data in your index field should be unique between records, mark this check box. When a user tries to enter data in the field that already exists in another record, the user will receive a warning.

**Hint**

If you are indexing on fields such as a Company, Contact, or phone field, the index is a good candidate for duplicate record checking. If you are indexing on a field like the City or State field, you will probably have multiple valid records with the same data. It is not recommended you use duplicate record checking with these indexes.

## Multiple Index Search

This is used to instruct TeleMagic to use this index when the `Multiple Index Search` option is selected in Goto. When searching for a contact record based on a piece of data, if `Multiple Index Search` is selected, TeleMagic will search through every index selected for use with this feature.

## Maintain Position

If you would like to maintain your position in an index when data in the index field changes, mark this check box. For example, if a record's state changes from California to Oregon, with `Maintain Position` marked, when you scroll to the next record, you will be at the next record in California. Without this option marked, you will be at the next record in Oregon, as determined by the data currently existing in the field.

## Ascending/Descending

If you want the index order running from A to Z, 0 to 9, or oldest to most recent, select the `Ascending` radio button. If you want the index order running from Z to A, 9 to 0, or most recent to oldest, select the `Descending` radio button.

## Use this index with the Contact Manager's "See Only" option

If you want to be able to use this index when you have the **See Only...** options selected on the **Contact Manager** menu, select this option. If you want to be able to use this index when the **See Only...** options are *not* in use, unmark this option.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Creating_Indexes)<<1}

# The Change Index Dialog Box

The level you selected when initially adding the index is shown on the title bar of this dialog box.

### Index Name

Change the name of the index, if desired, in this field.

### Index Filter

Filtered indexes are special indexes that have a built in filter. When working in large databases, this can significantly optimize TeleMagic. When using a filtered index, you will only be able to work with records in that filter when the index is selected. If this is a filtered index, you can change the filter. If this is not a filtered index, this option will not be available.

### Edit

Click Edit to open the TeleMagic Expression Builder to edit the field(s) or expression used in this index. (See the Expression Builder topic for help with building expressions.) Any changes will appear in the Index Expression window.

### Case Sensitive

If you would like your index to recognize upper-case and lower-case characters, mark the `Case Sensitive` check box. If this is marked, the index will place all of the records containing an upper-case character at the start of the selected field at the top of the index, followed by all of the records with lower-case characters at the start of the selected field. (i.e., A - Z, a - z.) This is useful if you want to do further sorting by case. A case sensitive check will also be applied when you are searching for a record based on the data in the index field. If you want records to be sorted alphabetically, regardless of case (i.e., Aa - Zz), unmark the `Case Sensitive` check box.

**Note**

When creating index expressions, an UPPER() statement is automatically added to your expression if you do not choose `Case Sensitive`. This instructs TeleMagic to not pay attention to case by viewing everything in the field as uppercase.

### Check Duplicate

Duplicate record checking is used to prevent users from adding the same record more than once. If the data in your index field should be unique between records, mark this check box. When a user tries to enter data in the field that already exists in another record, the user will receive a warning.

**Hint**

If you are indexing on fields such as a Company, Contact, or phone field, the index is a good candidate for duplicate record checking. If you are indexing on a field like the City or State field, you will probably have multiple valid records with the same data. It is not recommended you use duplicate record checking with these indexes.

### Multiple Index Search

This is used to instruct TeleMagic to use this index when the `Multiple Index Search` option is selected in Goto. When searching for a contact record based on a piece of data, if `Multiple Index Search` is selected, TeleMagic will search through every index selected for use with this feature.

## Maintain Position

If you would like to maintain your position in an index when data in the index field changes, mark this check box. For example, if a record's state changes from California to Oregon, with `Maintain Position` marked, when you scroll to the next record, you will be at the next record in California. Without this option marked, you will be at the next record in Oregon, as determined by the data currently existing in the field.

## Ascending/Descending

If you want the index order running from A to Z, 0 to 9, or oldest to most recent, select the `Ascending` radio button. If you want the index order running from Z to A, 9 to 0, or most recent to oldest, select the `Descending` radio button.

## Use this index with the Contact Manager's "See Only" option

If you want to be able to use this index when you have the **See Only...** options selected on the **Contact Manager** menu, select this option. If you want to be able to use this index when the **See Only...** options are *not* in use, unmark this option.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_To_Change_an_Index)<<1}

# The Copy an Index Dialog Box

### Database
If the index is not in the current database, choose the correct database here.

### Copy this Index
Select the index you want to copy from the drop-down list.

### New Index Name
Enter a unique name for the new index. This will default to "Copy Of" and your original index name.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_To_Copy_an_Index)<<1}

# The Group Replace (database level) Dialog Box

## Field List

The list on the left displays the fields on the selected database level. As you select fields whose data you want to replace, they will move to the list on the right. When the group replace is run, TeleMagic will go through each of the selected fields in turn and replace their contents as specified.

## Add

In the list on the left, highlight a field whose data you want to change and click this. The Replace Expression Dialog Box will open where you define what data you want to replace the field's contents with.

## Remove

If you decide you do not want to replace a selected field, highlight it in the list on the right and click this. The field will be returned to the list on the left.

## Replace Mode: Fast /Multi-User

Select `Fast` if there are no other users in the database. This allows quicker group replace since TeleMagic does not have to worry about encountering a locked record. (If you select this and another user is editing a record, when TeleMagic reaches that record you will receive a message informing that the record is locked. You will be given the option to retry or cancel the replace.)

Select Multi-User if there are other users in the database. This method is much slower, but it does not require exclusive use of the database. If TeleMagic detects a locked record, it will skip it and move on. After the replace is completed, you will have the option of printing a report of any records that were skipped and/or tagging those records so you can run the replace again using the Tagged Records filter. (If you will be using this feature, it is recommended that you clear all tags before running the first group replace.)

## Filter

This allows you to select a filter for the records that should be changed.

## Replace

This begins the replace.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Group_Replace)<<1}

# The Group Delete/Recover Dialog Box

The Group Delete/Recover Dialog box allows you to delete all records in a filter or restore all records that have been deleted since the last rebuild.

## Delete / Recover

Choose the appropriate radio button to select to delete records or recover deleted records.

## Related Activities

If you have selected to delete, select this if you would also like to delete all activities in the Activity Manager linked to the contacts being deleted.

If you have selected to restore deleted records, and activities have previously been deleted with their linked contact records, select this if you would like to recover those activities along with the linked records.

## Filter

Select the filter that defines the records with which you want to work. Only records meeting the filter criteria will be deleted or restored.

To Delete a Group of Records:
To Recover Records:

# The Reassign Records Dialog Box

## Reassign

This section allows you to define the child records that should be reassigned.

**Current Record**
Selecting this radio button will allow you to reassign the current child record to another parent.

**Multiple Records with filter**
Selecting this radio button will allow you to open the drop-down list to select a filter. All records meeting the filter criteria will be reassigned.

## Reassign to

This section will allow you to select the new parent record to which the selected child record(s) should be assigned.

## Using Index

Use this drop-down list to select an index to assist in locating the appropriate parent record. The available parent records will be displayed in order according to this index.

## Search for

If you know the data contained in the index field for the desired parent, enter it in this field. (For example, if you are indexing on Company, enter the company name.)  Click **Search for** to bring up a browse window of all available parent records. (If you are reassigning Level 3 records, the list will include all Level 2 records; if you are reassigning Level 2 records, the list will include all Level 1 records.)  If you made an entry in the **Search for** field, you will be taken directly to the closest matching record in the browse window. Double-click on the appropriate parent, or highlight it and press ENTER.

## Parent Info

As soon as you select a record from the **Search for** browse window, the record descriptor for that record will be displayed in this area. This will allow you to confirm that you have selected the correct record.

## Reassign

Click this button to reassign the selected record(s) to the parent displayed in the `Parent Info` field. (This button will be dimmed if you have not yet located a parent.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Reassigning_Child_Records)<<1}

# The Set Recall Dialog Box

## Description

Fill in or change the activity `Description` as necessary. This will default to “Call to” and your Company and/or Contact Key Fields. (If you do not have either Key Field defined, it will default to your record descriptor.)

## Duration

Fill in or change your estimate on how long the call will last.

## Type

This will default to Call. If you do not want to set a recall, fill in or change the activity Type as necessary.

## Priority

Select an activity Priority if desired. The priority is used to filter some activity reports.

## Call Back

Type, or use the date-picker icon, to choose the date for the recall. Type, or use the time picker icon, to set the time to call back.

Alternatively, to set the recall for a date and time relative to the current date and time, select the `in` radio button. Type a number into the `in` text box and choose the appropriate time period from the drop-down list.

## To-Do

If you want the item to appear as a To-Do, mark the To-Do check box. (If this is a To-Do, only the date in the `Call Back` area will be available.

## Alarm / Lead Time

If you want to set an alarm for this recall, mark the `Alarm` check box, and type an advance warning time in the `Lead Time` field.

## Assigned by

The name of the user who originated the activity is indicated in this field.

## Assigned To

If you want to assign the recall to another user, open the drop-down list in the `Assigned to` field, and choose a user from the list. This list will include all users who have granted you access to their calendars.

## Comments

Enter any comments for this activity. Click the **Stamp** button to place a date, time, and User ID stamp on your comments. Click the **Paste Contact Info** button to have contact information added to the comment.

## Availability

Click this button to open the Availability dialog box and verify that the user to whom the activity is being assigned is available.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Setting_Linked_Recalls_and_Other_Activities_
in_the_Contact_Manager)<<1}

# The Notebook

Notebook records are like a personal reference book. You can use them to store text not associated to any particular contact. For example, Area Code lists, company goals, and ideas on a specific topic can all be stored in Notebook records.

## The Notebook Toolbar

The row of tools beneath the title bar comprise the toolbar. The following tools are available:

- **Close**
  Click this button to close the Notebook
- **Goto**
  Click Goto to access the Go To Note dialog box. Use this dialog box to search for a particular notebook record.
- **Browse**
  Click this button to open the Notebook Browse window.
- **Add**
  Click this to add a new notebook record.
- **Edit/Save**
  Click **Edit** to change the current notebook record. This button will turn into **Save** when you are in edit mode.
- **Cancel**
  This button becomes available when you are editing or creating a note. Click it to abandon changes and return to non-edit mode.
- **Delete**
  Deletes the current note.
- **Print**
  Prints the note to your Windows default printer.
- **Sort Notes by Description**
  Toggles with Sort Notes by ID. When this button is selected, the notes will be indexed according to the entry in the `Description` field.
- **Sort Notes by ID**
  Toggles with Sort Notes by Description. When this button is selected, the notes will be indexed by the entry in the `Note ID:` field.
- **View Database Notes**
  Toggles with View Personal Notes. Notes in the Notebook can be either Database or Personal. Database notes can be viewed by anyone with access to the database.
- **View Personal Notes**
  Toggles with View Database Notes. Notes in the Notebook can be either Database or Personal. Only the author can view Personal notes.
- **VCR Buttons**
  The VCR buttons will take you to the first record in the filter (Database or Personal), the previous note, the next note, or the last note.

## Note ID

This is the name of the notebook record. Records can be sorted and searched for based on this ID.

## Description

Describe this notebook record. Records can be sorted and searched for based on this description.

## Notes

This is the area where you type the actual notes that make up the notebook record. At the top of this section are the RTF controls. Use these controls to select the font and set the various font effects. When you press TAB in this area, the cursor will go to the next field in the tab sequence (The Note ID field). If you press SHIFT+TAB, the focus will shift to the Bulleted List control and move through the RTF controls from right to left. When an RTF control is selected in this way, it can be activated by pressing SPACE. To insert a tab in your note, press CTRL+TAB.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Notebook_Access)<<1}

# Print Notes Dialog Box

## Current Record / All Records / Range of Records

Select the radio button corresponding to the item(s) to be printed. If you select `Range of Records`, the `Beginning with` and `Ending with` fields will become available.

## Order By

Select the order in which the Notebook record(s) will be printed. Select either by Note ID or Description. If you have selected to print a range of records, this will also be used to determine whether the range is based on the ID or description.

## Beginning with / Ending with

These fields are used if you have selected to print a range of records.

In the `Beginning with:` field, enter the ID or description of the first record in alphanumeric order in the range . (If you leave this field blank, it will start with the first record and print through to the record specified in the `Ending with:` field.)

In the `Ending with:` field, enter the ID or description of the last record in alphanumeric order in the range . (If you leave this field blank, it will start with the record specified in the `Beginning with:` field and print through to the last record.)

## View

Click this button to preview the print job.

## Print

Click this button to print this information.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Printing_Notebook_Records)<<1}

# The Go To Note Dialog Box

### Order By
Select to search in the order of the Note IDs or the Descriptions of the Notebook records.

### Note ID
If you selected to order by the Note ID, enter the Note ID of the record you want to locate.

### Description
If you selected to order by the description, enter the description of the record you want to locate.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Listing_and_Finding_Notes)<<1}

# The Branch Scripts Dialog Box

## Script
This shows the name of the current script. Click the arrow to open the drop-down list of all available scripts. Highlight a script to make it the current script.

## Branches
When the **Branches** tab is selected. the field on the left side of the dialog box displays a tree view of the script. The number to the left of each branch indicates its level in the tree, with 001 being the first level. Child branches are indented from their parents. To open the tree view and display child branches, double-click on the parent. Click on the parent again to close the tree view for that branch. If the name of a branch does not fit in the available space, you can hold your cursor over it momentarily and a ToolTip will open with the branch name. You can vary the size of the field by holding your cursor over the division between it and the field to the right. When the cursor changes to a sizing arrow, click and drag the border to the desired location.

## Fields
Click on this tab to display any database fields attached to the current branch in the field on the left of the dialog box. You can edit the database fields from this page. This tab is not available if there are no database fields attached to the current branch.

## Text Field
The text of the selected branch is displayed in this field. Text in this field can be selected and copied, but cannot be edited.

## Reset
Clicking **Reset** will bring you back to the primary branch and erase the History list. Use this when you are ready to start a new call.

## Contact
Clicking **Contact** will switch you over to the current contact record without losing your place in the script. To return to the Branch Scripting dialog box, click the Branch Scripting toolbar icon. You will be returned to the place in the script where you left off.

## Setup
Clicking **Setup** will allow you to create a new script or modify an existing script. This option is only available to supervisor users and only one user may access Setup at a time.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT1_To_Make_a_Call_Using_a_Script)<<1}

# The Script Setup Dialog Box

## Script

This shows the name of the current script. To change to a different script, open the drop-down list and highlight another script.

## Create Activity with History

Mark this check box to create an activity each time the script is used detailing the branches that were selected. The activity will be linked to the contact record displayed in the Contact Manager at the time the script is used.

## Level Name / Usage

This lists all of the branches of the current script and details the number of times each branch has been accessed when in use. A plus sign indicates that there are child branches associated with the branch. Clicking on the plus sign displays the child branches and toggles the plus sign to a minus sign. Click on the minus sign to close the child branches on the tree view.

## Set Branch Order

This button becomes available when the current branch has several child branches. Click on this button and you will be able to re-order the branches by dragging them to the desired position. Clicking on this button a second time releases it and prevents further edits to the branch order.

## Text

This area displays the text of the current branch. Text in this field can be selected and copied, but cannot be edited.

## Edit

Click this button to edit the current branch. The Edit Script dialog box will open to allow you to change the branch.

## Add Script

Click this button to add a new script. The Add Script dialog box will open to allow you to create the script name and the text for the first branch of the new script.

## Add Branch

Click this button to add a new branch. The new branch will be a child branch accessible from the currently highlighted branch. The Add Branch dialog box will open to allow you to create the branch name and the text for this branch.

## Delete

Click this button to delete the selected branch and all child branches. You will be prompted to confirm the decision to delete.

## Print

Click this button to print the script. The Branch Scripts Report dialog box will open. You can print the entire script, or just an outline of the script.

## Close

Click this button to leave the script setup area.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT1_To_Set_Up_a_New_Script)<<1}

# The Sales Forecasting Dialog Box (Forecast Page)

### Tabs
Click these tabs to open the other pages of the Sales Forecasting dialog box.

### Description
A description of this forecast.

### Rep
Select the sales representative assigned to this forecast. When you click in this field, the Select Sales Representative dialog box will open with a list of all TeleMagic users.

### Product
Enter a product name. Press F2 to open or create a list box for this field.

### Type
Enter a sales type. You can use this field to categorize your sales. Press F2 to open or create a list box for this field.

### Qty
Enter the quantity of products in this forecast.

### Status
Enter a sales status. You may decide to use this for the status of your prospect (such as new lead, existing customer, etc.), or the status of the actual sale. Press F2 to open or create a list box for this field.

### Forecast Amounts
These fields get completed before the sale is actually made. These fields represent what has been discussed with the contact, or your pending sale information. The amounts are intended to be projections and will not necessarily match the actual sale figures once it is finalized.

#### Quotation
Enter the amount quoted for this forecast. (A quotation amount must be entered for the reports to print properly.)

#### Budget Amount
Enter the amount that the customer has budgeted for this purchase (if known).

#### Projected Sale Date
Enter the projected date that this forecast will become a sale. Click the Date Picker icon to search for a date. (A projected sale date must be entered for the reports to print properly.)

#### Probability of Closure

Enter the percentage of probability that this forecast will become a sale. (A probability of closure must be entered for the reports to print properly.)

### Comments
Enter any comments you want to be recorded with this forecast. It is often beneficial to keep a running account of any notes or information related to the sale or the contact.

### Notepad Stamp
Click this button to create a date, time, and User ID stamp in the comments area.

### Paste Contact Info
Click this button to enter Contact information in the comments area. This button becomes available when the forecast is linked to a contact.

### VCR Buttons
Use these buttons to either go to the first forecast, go to the previous forecast, go to the next forecast, or go to the last forecast in the current filter and index.

### Index
Open the drop-down list to select an index to use for sorting the forecasts. You may sort on almost any of the fields on the Sales Forecasting dialog box.

### Filter
Select the filter to be used to limit the displayed forecasts from the drop-down list. Sales Forecasting filters are not the same as your database filters. Sales Forecasting filters allow you to filter based on sales status and/or the contact or database the forecast is associated with.

### Add/Save
Click this button to create a new forecast. When in edit mode, this button toggles to **Save**. Click on **Save** to save current edits and exit edit mode. Be very cautious when saving a forecast. Depending on your security access, you may not be able to alter saved information. Double-check the information before saving it.

### Edit
Go to the forecast you want to edit and then click this button to go into edit mode.

### Delete/Cancel
Click this button to delete the current forecast. When in edit mode, this button toggles to **Cancel**. Click **Cancel** to abandon changes and cancel edit mode.

### Browse
View the forecasts using a browse window.

### Properties
Click this button to open a message box with link and other information about the current sales forecast.

## Close

Close the Sales Forecasting module.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES1_Adding_Sales_Forecasts)<<1}

# Contact Link Page

### Tabs
Click these tabs to open the other pages of the Sales Forecasting dialog box.

### Description
A description of this forecast.

### Rep
Select the sales representative assigned to this forecast. When you click in this field, the Select Sales Representative dialog box will open with a list of all TeleMagic users.

### Contact Info
Once the forecast has been linked to a contact, key information from that contact record will be displayed in this field.

### No Link/Current Contact/Other Contact
Link this forecast to a contact record. Choose to link it to the current contact, another contact record (whether in the current database or another database), or choose `No Link` if the forecast is not related to one of your contact records.

### Search My Contacts For
This field becomes available when the Other Contact radio button is selected. Enter the information to be searched for and click **Search**. This will search the current database only.

### Advanced Search
This button becomes available when the Other Contact radio button is selected. Click this button to open the Advanced Search dialog box and search for a contact in another database.

### Browse Contacts
This button becomes available when the Other Contact radio button is selected. Click this button to open a browse window of the current database. Click on the desired record to link the sales forecast to that record.

### Close
Close the Sales Forecasting module.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES1_Adding_Sales_Forecasts)<<1}

## Sales Progress Page

### Tabs
Click these tabs to open the other pages of the Sales Forecasting dialog box.

### Description
A description of this forecast.

### Rep
Select the sales representative assigned to this forecast. When you click in this field, the Select Sales Representative dialog box will open with a list of all TeleMagic users.

### Sales Phase
Use this field record the steps that lead up to a sale. It is recommended that you standardize each sales phase. For example, you might have numbered follow-up letters, each one representing a different phase; or a specific set of sales steps which would each constitute a phase. It is useful if all users use the same terminology in naming sales phases. To that end, it is recommended you attach a list box to this field. (The list box will be shared by all seven `Sales Phase` fields.).

### Comments
Enter comments related to each phase of the sale in these fields.

### Date
Enter the date the phase was entered in these fields.

### Date Picker Icons
Use these icons to open the Date Picker dialog box and select the date for each phase.

### Flags
Enter a user definable flag code, consisting of up to 5 characters, that helps to describe the sales phase. For example, Hot, Warm, Cold, Dead, etc.

### Comments
Enter any comments you want to be recorded with this forecast. It is often beneficial to keep a running account of any notes or information related to the sale or the contact. This field is identical to the one found on the Forecast page.

### Notepad Stamp
Click this button to create a date, time, and User ID stamp in the comments area.

### Paste Contact Info
Click this button to enter Contact information in the comments area. This button is available if the forecast has been linked to a contact.

### VCR Buttons

Use these buttons to either go to the first forecast, go to the previous forecast, go to the next forecast, or go to the last forecast in the current filter and index.

## Add/Save

Click this button to create a new forecast. When in edit mode, this button toggles to **Save**. Click on **Save** to save current edits and exit edit mode. Be very cautious when saving a forecast. Depending on your security access, you may not be able to alter saved information. Double-check the information before saving it.

## Edit

Go to the forecast you want to edit and then click this button to go into edit mode.

## Delete/Cancel

Click this button to delete the current forecast. When in edit mode, this button toggles to **Cancel**. Click **Cancel** to abandon changes and cancel edit mode.

## Browse

View the forecasts using a browse window.

## Close

Close the Sales Forecasting module.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES1_Adding_Sales_Forecasts)<<1}

# Closed Sale Page

### Tabs
Click these tabs to open the other pages of the Sales Forecasting dialog box.

### Description
A description of this forecast.

### Rep
Select the sales representative assigned to this forecast. When you click in this field, the Select Sales Representative dialog box will open with a list of all TeleMagic users.

### Purchase Order
Enter the purchase order number provided to you by the customer (if available).

### Actual Sale Amount
Enter the amount of the sale. (A sale amount must be entered for the closed sales reports to print properly.)

### Sale Date
Enter the date that the sale was made. (A sale date must be entered for the closed sales reports to print properly.)

### Cost of Goods
Enter the cost of goods (if known).

### Original Forecast Information
The date, forecast amount, and budget amount of the original forecast are displayed in this section.

### Comments
Enter any comments you want to be recorded with this forecast. It is often beneficial to keep a running account of any notes or information related to the sale or the contact. This field is identical to the one found on the Forecast page.

### Notepad Stamp
Click this button to create a date, time, and User ID stamp in the comments area.

### Paste Contact Info
Click this button to enter Contact information in the comments area.

### VCR Buttons
Use these buttons to either go to the first forecast, go to the previous forecast, go to the next forecast, or go to the last forecast in the current filter and index.

### Add/Save

Click this button to create a new forecast. When in edit mode, this button toggles to **Save**. Click on **Save** to save current edits and exit edit mode. Be very cautious when saving a forecast. Depending on your security access, you may not be able to alter saved information. Double-check the information before saving it.

## Edit

Go to the forecast you want to edit and then click this button to go into edit mode.

## Delete/Cancel

Click this button to delete the current forecast. When in edit mode, this button toggles to **Cancel**. Click **Cancel** to abandon changes and cancel edit mode.

## Browse

View the forecasts using a browse window.

## Close

Close the Sales Forecasting module.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES1_Adding_Sales_Forecasts)<<1}

# The Sales Forecasting Reports Page

## Report

Open the drop-down list and select the report you would like to print. There are four types of reports that are available.

- The Closed Sales report will produce a report of forecasts with data in the `Actual` fields. (Click here for information on the options available when printing the Closed Sales report.)

- The Forecasted Sales report will produce a report of any sales forecast that has data in the `Forecasted` fields but not in the `Actual` fields. (Click here for information on the options available when printing the Forecasted Sales report.)

- The Forecast vs. Actual report will produce a report comparing the `Sale Amount` field to the calculated forecast amount. (Click here for information on the options available when printing the Forecast vs. Actual report.)

- The Sales Progress report will produce a report showing all of the entries from the Sales Progress dialog box. If there are no Sales Progress entries for a sales forecast, a blank line will print. (Click here for information on the options available when printing the Sales Progress report.)

**Note**

These reports read the `Projected Sale Date` field and, depending on the report, the `Sales Date` field to determine which records should be included in the report. Forecasts with no data in these fields will not be included in the report.

## Start Date

Enter the earliest date from which the report is to select records or click the Date Picker icon to bring up a calendar from which you can select a date.

## End Date

Enter the last date from which the report is to select records or click the Date Picker icon to bring up a calendar from which you can select a date.

## Include

The `Include` check boxes allow you to determine how much information will be included.

- If the `Detail` check box is marked, the report will contain additional information specific to the record, such as the Sales Rep and Product, as well as dollar amounts and dates. This information will vary depending upon the report you are printing. You will also be able to select from the following check boxes:

  - If the `Contact Information` check box is marked, the report will contain the Company and Contact fields from the record to which the forecast is linked (if the record is in the current database).

  - The `Other Information` check box allows you to include miscellaneous information pertaining to a forecast, such as the contents of the `Description` field.

- If the `Sales Progress` check box is marked, the report will contain the information from Sales Progress dialog box.

- If the `Comments` check box is marked, the report will contain any notes entered in the notepad on the Sales Forecasting dialog box.

- If the Summary Totals check box is marked, subtotals (based on your grouping selections) and totals will be generated.

**Note**
Not all of these check boxes will be available with each type of report style. In addition, the actual information included in the report as a result of using the check boxes may differ depending on the report style.

## User Group / Individual

Select `Individual` if you want to report on only one user. If you are a supervisor user and want to report on forecasts other than your own, when the `Individual` radio button the drop-down list will show all users in the system. Select the user on whom you want to report from the list. (If you are not a supervisor user you will only be able to view and report on your own sales forecasts.)

If you are a supervisor user, select the `User Group` radio button if you want to report on all members of a user group. When the `User Group` radio button is selected, the drop-down list will show all groups in the system. Open the list and click on your selection. (Consider creating a user group for Sales Reps. See the topic To Add a User Group: for more information.)

## Report on

Open the drop-down list and select the appropriate filter:

- If you choose `All Records` (which is the default), you will get all of the forecasts regardless of database and contact link.

- If you choose `Current Database`, you will get all of the forecasts linked to contact records in the current database.

- If you choose `Current Contact`, you will only get forecasts linked to the current contact.

**Note**
If you select `Current Contact`, contact information will automatically be added to the header of the report and the `Contact Information` check box in the `Include` list will be dimmed.

If you are printing the Sales Progress report, you will have two additional options:

- If you choose `Closed Sales`, you will get all of the forecasts with sales information (based on a date in the Sales Forecast dialog box's `Sale Date` field).

- If you choose Forecasted Sales, you will get all of the forecasts with no sales information (based on having a date in the Projected Sales Date field and no date in Sale Date).

### Type

Open the drop-down list and select a filter based on items in any list box you have attached to the `Type` field on the Sales Forecasting dialog box. If you do not have a list box attached to this field, you will be able to report on either all types or forecasts with no type in this field.

### Status

Open the drop-down list and select a filter based on items in any list box you have attached to the `Status` field on the Sales Forecasting dialog box. If you have no list box attached to this field, you will be able to select between all status types, or forecasts with no status in this field.

### Product

Open the drop-down list and select a filter based on items in any list box you have attached to the `Product` field on the Sales Forecasting dialog box. If you have no list box attached to this field, you will be able to select between all products, or forecasts with no entry in this field.

### Index

Open the drop-down list and select the order in which you want the report to print.

**Note**

The options available in the `Index` list will vary depending upon the report you have selected.

### Use Grouping

Groupings will allow you to group by the Month, Product, Sales Rep, Status, Type, or Year and produce summary totals on each grouping. For example, if you are ordering by Product, and you create a grouping by Sales Rep, the records for each Sales Rep will be in order by product. You can then create a further grouping by month to see the Sales Reps groups in chronological order divided by month, with multiple forecasts in each month arranged by product. You can select up to three sub-groups.

### Groups

This button becomes available when you have marked `Use Groupings`. Click this button to open the Report Groupings dialog box.

### Groupings

The list of groupings will be listed in this field. Up to three groupings can be chosen.

### Report / Graph / Report with Graph

- To generate a standard, text-based report, click the `Report` radio button.

- If you have groupings established and want to see your report in the form of a graphic chart, select the `Graph` radio button.

- If you have groupings established and want to see a standard report with a graph, select the `Report with Graph` radio button.

**Note**

The graph options are unavailable if you are not using data groupings. If you are creating a pie chart, you need only one grouping. If more than one grouping is selected with a pie chart, the report will be based on the first grouping only. (Be aware that because a pie chart only includes one grouping, if you select to group by month, TeleMagic will ignore the year. All forecasts in the same month, regardless of year, will be included in the same section of the pie.) Any other graph styles require two groupings if you are printing any report other than Forecast vs. Actuals. (Forecast vs. Actuals requires one grouping, with the comparison data acting as the other group.) If you have a third grouping, it will not be represented in the graph.

**Note**

The graph options use the MS Graph program (GRAPH.EXE). MS Graph is provided by Microsoft with many of its application programs (not including Windows). TeleMagic Enterprise will automatically search to see if GRAPH.EXE is in your computer. If you do not have MS Graph installed, TeleMagic will install it for you. If for any reason TeleMagic is unable to install MS Graph, the graph options will either be dimmed, or when you select to include a graph in a Sales Forecasting report, the printout will only show a sample of the graph style you have chosen. The sample will not generate any information based on your report selections or sales forecasting data, but will merely give you an example of what the specified type of graph will look like when generated using MS Graph. If this occurs, call TeleMagic Technical Support for assistance in installing MS Graph.

## Graph Style

This drop-down list becomes available when you have chosen to generate a graph. Select the graph style from the list.

## View

Select this to open a preview window of the report as it will print, based on your selections. Click **OK** to close the preview.

## Print

Select this to print the report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES2_Printing_Sales_Reports)<<1}

# The Report Groupings Dialog Box

Groupings will allow you to group by the Month, Product, Sales Rep, Status, Type, or Year and produce summary totals on each grouping. (The available groupings may vary, depending on the report you are printing.)

**Note**

If you have also selected an index on the main report dialog box, the forecasts will be sorted by that index within the groupings you select. For example, if you are indexing by Product and you create a grouping by Sales Rep, the records for each Sales Rep will be in order by product. You can then create a further grouping by month to see the Sales Reps groups in chronological order divided by month, with multiple forecasts in each month arranged by product.

## Available Groupings

Highlight the grouping you would like to use from the `Available Groupings` list and click **Add**. Even though there are a maximum of six groupings to choose from, depending on the report, you are only allowed to choose up to three for each report.

**Note**

When grouping by a month selection and/or a year selection, make sure that the sales forecast records on which you are reporting have dates entered in `Projected Sale Date` and/or `Sale Date` fields in the Sales Forecasting dialog box . If there are no dates entered, these records will be excluded from a report.

## Selected Groupings

Groupings you have selected in the `Available Groupings` list will be moved to this list. The order of the groupings in the Selected Groupings box is very important to how the report is arranged, as well as in calculating subtotals and totals. For example, if you were grouping by Sales Rep, then by Projected Sales Month, Sales Rep must be first in the Selected Groupings box. After you have selected all of the groupings to be used, you can rearrange the order in which they will appear (and, therefore, the order of data's grouping, subtotaling, and totaling).

To change the order of selected groupings, click the button to the left of each grouping, drag it to its new position, and drop it.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES1_Forecasting_Sales)<<1}

# The Fax Dialog Box

### Tabs
Click these to open other pages of this dialog box

### From
By default, the name of the user currently logged into this installation of TeleMagic will be automatically entered here. Enter any changes you desire. This information will be merged into the Fax From directive if it is included in the document being faxed.

### To
By default, the name of the current contact will appear here if you have properly set your Key Fields in Preferences. Enter any changes you desire. This information will be merged into the Fax To directive.

### Fax #
By default, the fax number of the current contact will appear here if you have properly set your Key Fields in Preferences. Enter any changes you desire. This information will be merged in to the Fax Number directive.

### Subject
Enter the subject of the fax in this field.

### Cover
Enter the path and file name of the document you want to use as the cover sheet for this fax. If you have previously sent a fax, TeleMagic will remember the previously used cover sheet and offer it as a default. Enter any changes you desire or click **Cover** to search for a different cover sheet.

### Queue
Open this drop-down list to select the queue that will hold this fax until it is processed. If you have a faxmodem installed locally in your workstation, and you have selected `Use Local Faxmodem` in Fax Preferences, you can select `Send Immediately (Local)`. If this is selected, the fax will be sent using the faxmodem at your local workstation. If you send any other queue, it will be processed by the Automation Server during its regular processing cycle.

> **WARNING!**
> The queue named Print Queue is a special queue designed to batch print word processing documents. If you truly want to use the Automation Server to print the documents and reports selected for this fax, you can select this queue. If you want to send the documents out as a fax, do not select this queue. Items sent to the Print Queue will not be faxed.

### Create Activity
If you would like an activity created to show that this fax was sent, mark this check box. This option will default based on your Fax preferences.

> **Note**
> If you are using the document history to keep track of the correspondence that has been sent to a contact, make sure this check box is marked. This list is generated based on these activities.

## Notepad Stamp

If you would like the contact's Notepad stamped with information about this fax, mark this check box. This option will default based on your Fax preferences.

## Save Merged Files

Mark this checkbox to save a copy of each merged document. Each of these documents will be associated with the contact to whom they were sent. Each copy will be named *document filename x.*doc where *x* is a number assigned in sequence to the file. The *document filename* will be truncated as necessary to accommodate the file name. This option is not available if you are faxing locally and using a filter. To fax with a filter and use this option, you must use the Automation Server.

> **Warning!** Selecting this option can result in the generation and storage of large numbers of files.

## Monitor Fax

If you are sending your fax locally and would like to monitor its progress, mark this check box. (This is not applicable to faxes sent to the queue.) This option will default based on your Fax preferences.

## Notification

If you are sending your fax locally and would like to notified as soon as it is successfully sent, mark this check box. (This is not applicable to faxes sent to the queue.) This option will default based on your Fax preferences.

## Send

Click this button to send the fax.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Sending_a_Fax)<<1}

# Documents Page

## Documents to Fax

Enter the name of up to 10 documents that you want to include with this fax, or click the numbered button on each line to browse for the document to be included on that line, or use the `Next Document` drop-down list. If you are faxing locally, all documents included must have been created with a word processor currently set up in Writing preferences. If you are faxing to the queue, the document must have been created with a word processor that is available to the Automation Server.

## User/Global/Database

Use these radio buttons to select the document folder whose contents are to be displayed in the `Next Document` drop-down list.

## Next Document

This list will report the contents of the document folder indicated by the radio button (`User`, `Global`, or `Database`). When you select a document from this list, the selected document will be entered in the next available `Document to Fax` field.

## Send

Click this button to send the fax.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Sending_a_Fax)<<1}

## Options Page

### Delay Until / Date / Time

This allows you to instruct TeleMagic to wait until the specified time and date to begin processing the fax. It will remain in the queue with the status Hold until that time. (This is only applicable to faxes that will be processed by the Automation Server.)

### Priority

This allows you to prioritize the faxes in the queue to control sending order. The default priority is 2, which causes the faxes to be processed in the order in which they are received by the queue. Priority 1 faxes will be sent first (only supervisor users may select Priority 1). Priority 3 faxes will be processed after all other faxes are sent.

### Email Notify on Successful Completion

Select this option if you would like TeleMagic to send you an e-mail message after the fax has been successfully sent. The e-mail will note the details of the fax.

### Email On Failure

Select this option if you would like to be notified by e-mail only in the event of an unsuccessful fax.

### Stamp Documents

Select this option if you would like to keep a record of the documents, including the path and file name, and reports sent with the fax. If you have chosen the `Create Activity` option in the main Send Fax dialog box, this information will be stamped in the activity's `Comment` field; if you have chosen the `Notepad Stamp` option in the main Send Fax dialog box, this information will be stamped in the contact's notepad; and if your Fax Stamp key field is a memo field, the information will be stamped in the designated field.

### Stamp Comments

Select this option if you would like to record any cover comments. These comments will be stored in the same manner as the document names described above.

### Use Filter

Select this option if you would like to fax to multiple contacts. (`Use Filter` is only available if you are posting the fax to the queue.) If you leave this check box unmarked, a single fax will be sent to the current contact. If you check this box, the `Filter` drop-down list will become active. Open the drop-down list and select a filter. The fax will be sent to every contact in the filter.

> **Note**
>
> Depending on the number of TeleMagic users, servers, and queues at your company, there could be a significant delay between the time that you send the fax to the queue and the time a server gets around to processing it. It is only when the fax is actually processed that TeleMagic Enterprise evaluates the filter on which it is based. Because of this, when faxing to a filter, you should not change or delete the filter until the fax has been sent. When you select a filter, the `To` and `Fax #` fields in the Send Fax dialog box will dim.

### Merge All Documents / Merge Cover Page Only / Do Not Merge Any

These options allow you to expedite faxing by letting TeleMagic know when it does and does not need to search for merge fields in the documents being sent.

- Select `Merge All Documents` if the cover page and any of the following documents contain merge fields. With this selected, TeleMagic will search for merge fields in all documents being sent.

- Select `Merge Cover Page Only` if only the cover page contains merge fields and following documents do not. TeleMagic will search for merge fields in your cover document, but not in any other documents. (If there are merge fields in the following documents, they will print exactly as they appear in your word processor; e.g., <<phone_LVL1>>.) This option is especially useful if you are faxing to a filter. In this case, the cover page will be opened, merged, and closed for each contact, but the following documents will be opened only once.

- Select `Do Not Merge Any` if there are no merge fields at all in your fax. TeleMagic will not search for merge fields in the cover page or any following documents. If you are faxing to a filter, TeleMagic will open the word processor on the first fax in the filter to “print” the document, but will not look for merge fields and will not open it on subsequent faxes in the filter. With this field unmarked, TeleMagic will open the word processor and search for merge fields on every fax. (Do not select this if your document contains merge fields. If there are merge fields in the following documents, they will print exactly as they appear in your word processor; e.g., <<phone_LVL1>>.)

**Warning!**
If you are faxing a document with a graphic from Word for Windows to every contact in a filter, select either `Merge Cover Page Only` or `Do Not Merge Any` to make sure that the document containing the graphic is not merged. If you attempt to fax a document from Word which contains a graphic and merge fields, you may experience a memory problem associated with DLL files in this word processor.

**Warning!**
If you are running the Automation Server under Windows 95 or Windows 98, you are using Word 97 as your word processor, and your fax contains no merge fields, it is important that you select `Do Not Merge Any.` If this option is not selected, the system that is running the Automation Server will eventually generate an Out of Memory error or General Protection Fault. This problem does not occur when running under Windows NT.

## Send

Click this button to send the fax.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX1_Using_the_Fax_Feature)<<1}

# External Docs Page

## Start Capture

Click this button when you are ready to start the capture of a document produced on an application other than one supported by TeleMagic. The External Document Description dialog box will open. After you have closed the External Document Description dialog box, this button will toggle to **End Capture**. Print the document from the external application and click **End Capture** when complete.

## Attach Docs

Click this button to open the Select External Documents to Fax dialog box.

## Select Standard Rpts

Click this button to open the Select Standard Reports to Fax dialog box.

## Select Custom Rpts

Click this button to open the Select Custom Reports to Fax dialog box.

## Send

Click this button to send the fax.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX1_Using_the_Fax_Feature)<<1}

# Comments Page

## Comments

Enter any comments or notes you want to include with this fax in the text field. These comments will be merged into the Fax Notes directive if it has been included in any of the documents (cover sheet or others) included in this fax.

## Send

Click this button to send the fax.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Sending_a_Fax)<<1}

# The (report format) Report of Priority (selected priorities) Dialog Box

This report will print to resemble a page of your calendar. The title will vary according to the specific menu item you chose to open this dialog box.

## Report format

Select the calendar view you would like represented in the report. Each page of the report will resemble one page of the selected view. This will default to the menu item that you chose to open this dialog box.

## Include

- To include activities in your report, mark the `Activities` check box.
- To include To-Do's in your report, mark the `To-Do's` check box.
- To include all pending activities in your report, mark the `Due` check box.
- To include all completed activities in your report, mark the `Completed` check box.

**Note**
You cannot unmark both `Due` and `Completed`. Additionally, if you have unmarked both `Global` and `Personal` under `Extended Activities`, you will not be able to unmark both `Activities` and `To-Do's`.

## Date range

Enter the dates on which you want to report using the `From` and `To` fields, or click the Date Picker icons and select a date from the pop-up calendar.

**Note**
If you are printing a Week at a Time or Month at a Time report, the date range must span at least one week or one month (depending on the report type).

## Time range

Enter the range of time blocks that should be included in the report using the `Time range` fields, or click the Time Picker icons and select the time from the pop-up clock.

**Note**
This option is not available if you are creating a Month at a Time report. Additionally, Week at a Time reports are always 10 hours long. The `To:` field will be completed automatically based on the `From:` field.

## Priority

Use these check boxes to filter items based on the priorities that were assigned to them.

## User

To print a report for a different user, select the user from this list. This will include all users who have granted you access rights to their calendars.

## Resolution

To adjust the time blocks shown on the report, select the number of minutes in each block from this list.. (This option is not available if you are creating a month overview report.)

## Type

To include only a specific type of activity, enter the type exactly as it appears in the `Type` field on the Activity dialog box, or press F2 to select the type from the `Type` field's list box.

## Extended Activities / Global / Personal

If you would like to include extended activities in your report, you can specify whether `Global` (seen by all users) and/or `Personal` (your own) extended activities are to be incorporated. If you unmark both check boxes, no extended activities will be included.

## Detail Page

When you select the Month at a Time report, the `Detail Page` check box becomes available. The basic Month at a Time report resembles a month calendar with an icon to indicate that one or more activities of a certain type are scheduled on a date, but does not allow you to include any specific details on the activities. When the `Detail Page` check box is marked, a page will be printed giving information on each scheduled activity, including the time, priority, activity type, status, and description.

## View

Click this button to preview the report.

**Note**

If you select **View** to preview your Month at a Time report and have the `Detail Page` option selected, the detail page will not immediately display. When you close the Page Preview screen, another Page Preview screen containing the detail information will appear.

## Print

Click this button to print the report.

## Fax

Click this button if you want to send the report out with a fax. The Report Description dialog box will open to allow you to name and then save the report for faxing. After the report has been saved for faxing, you can include it in a fax by selecting it from the `Faxable Reports` list in the **Std. Reps** (Standard Reports) area at the Send Fax dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Activity_Schedule_Reports)<<1}

# The Activity History Report Dialog Box

## Report Title

Enter the title of the report. This will print at the top of every page. You can leave this field blank.

## All Activities / Pending Activities / Completed Activities

Select the completion status of activities on which you want to report. `Pending Activities` will include only activities that have not yet been completed; `Completed Activities` will include only activities that have been completed; `All Activities` will include both.

## Activities Due/Completed Between

If you are reporting on `All Activities` or `Pending Activities`, this will allow you to filter on the activity due dates. If you are reporting on `Completed Activities`, this will allow you to filter on the activity completion dates.

In `Start Date`, enter the earliest date from when the report is to select activities. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

In `End Date`, enter the last date from when the report is to select activities. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

## Created by / Assigned to

Select the `Created by` radio button if you want to report on the individual(s) who created the activities. (For example, if you are printing a report based on your own User ID, selecting `Created` by will cause the report to include all activities that you actually added, whether you kept them for yourself or assigned them to another user.)

Select the `Assigned To` radio button if you want to report on the individual(s) to whom the activities were assigned. (For example, if you are printing a report based on your own User ID, selecting `Assigned To` will cause the report to include all activities that appear on your schedule, whether you created them yourself or another user created them for you.)

## User Group / Individual

Select the `User Group` radio button if you want to report on all members of a user group. A list of user groups in which you are a member, or at least one member of the group has granted you access to his or her calendar, will appear on the list. Select the desired group from the list. (Only those users within a group who have granted you access to their schedules will be included in the report.)

Select the `Individual` radio button if you want to report on only one individual. A list of all users who have granted you access to their calendars will be available. Select the desired user from the list.

## Current Contact Only

Mark this check box if you only want to print a report on activities linked to the current contact.

## All Types / Single Type

Select `All Types` if you do not want to filter the report by activity type.

Select `Single Type` if you want to limit the report to activities of a particular type. If you select `Single Type`, you must choose that type from the drop-down list. The items in this list will be taken directly from the list box attached to the `Type` field in the Activity Manager, if one has been added. If the `Type` field does not have a list box, the list is filled with the following entries only: Blank Type, Call, and Meeting.

### All Status / Single Status

Select `All Status` if you do not want to filter the report by activity status.

Select `Single Status` if you want to limit the report to activities that have a particular status. If you select `Single Status`, you must choose the status on which you want to report from the list. The items in this list will be taken directly from the list box attached to the `Status` field in the Activity Manager, if one has been added. If the `Status` field does not have a list box, the list is filled with the following entries only: Blank Status, Completed, and Pending.)

> **Note**
> We recommend that you attach a validated list box to your `Type` and `Status` fields in the Activity Manager. This will ensure consistent data entry, making your reports more accurate.

### Statistics

If the `Statistics` check box is selected, a detailed statistical summary of the performance of every user included in the report will be generated. The statistical summary will provide a breakdown of the time spent by each individual on TeleMagic activities, and will show these statistics by activity status and activity type. If this box is not checked, no statistics will be printed.

### Detail

Mark the `Detail` check box if you want activity description, due date and time, type, and status information to be included in the report. This will also give you the option of including activity comments and contact information. Unmark it if you do not want to include these details and only print the statistics.

### Comments

Mark the `Comments` check box if you want activity notes to be included in the report. Unmark it if you do not want to include comments. (Comment will not be available unless you check `Detail`.)

### Contact Info

Mark the `Contact Info` check box if you want to include contact information from the contacts linked to activities on which you are reporting. Unmark it if you do not want to include these details. (Contact information will not be available unless you check `Detail`.)

### Key Fields

If you have selected to include contact information, you can choose which contact fields to use. Clicking the **Key Fields** button accesses the Contact Information dialog box. With this dialog box you can decide which Key Fields you want to include in your report.

### View

Click **View** to see a preview of the report. When you have finished previewing the report, click **OK**.

## Print

When satisfied with your selections, click **Print** to print the report.

## Fax

Click this button if you want to send the report out with a fax. The Report Description dialog box will open to allow you to name and then save the report for faxing. After the report has been saved for faxing, you can include it in a fax by selecting it from the `Faxable Reports` list in the **Std. Reps** (Standard Reports) area at the Send Fax dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Activity_History_Report)<<1}

## The Daily Schedule Dialog Box

### Start Date / End Date

In `Start Date`, enter the earliest due date from when the report is to print. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

In `End Date`, enter the last due date from when the report is to print. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

A page will be printed listing all pending activities for each day in the selected range.

### Form / Plain Paper

Select whether this report will print on a pre-printed form or on plain paper. If you choose plain paper, TeleMagic will put a border around each day's printout.

### Page Break on Days

If this is marked, the printer will skip to a new page after printing the list of pending activities for one day. (This report is designed to print in landscape view with two pages side by side on the same sheet of paper. Marking `Page Break on Days` will cause the second page to print on the second half of the paper.) If this is not marked, each day will be printed on the same page separated by a heading.

### User

Select the user whose calendar will be printed. This list will include any users who have granted you access to their calendars.

### Contact Info

Mark this check box if you want to include contact information for any contacts linked to activities included in the report.

### Key Fields

If you have selected to include contact information, you can choose which contact fields to use. Clicking the **Key Fields** button accesses the Contact Information dialog box. With this dialog box you can decide which Key Fields you want to include in your report.

### Activities / To-Do's / Extended Activities

Mark the check boxes representing the type of activity(ies) you want to include in the daily calendar.

### View

Click View to see a preview of the daily calendar. When you have finished previewing the daily calendar, click **OK**.

### Print

Click **Print** to print the report.

### Fax

Click this button if you want to send the report out with a fax. The Report Description dialog box will open to allow you to name and then save the report for faxing. After the report has been saved for faxing, you can include it in a fax by selecting it from the `Faxable Reports` list in the **Std. Reps** (Standard Reports) area at the Send Fax dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Daily_Schedule_Report)<<1}

# The Pending Activities Dialog Box

## Date

Enter the date on which you want to report, or click on the Date Picker icon to use the Go To Date dialog box to select a date. The report will include information on what is past due and what is upcoming, based on this date.

## Portrait / Landscape

Select the paper orientation for the report. Portrait view will print with the paper 8 1/2 inches wide by 11 inches high; landscape will print with the paper 11 inches wide by 8 1/2 inches high. If you select to print in landscape view, the `Form` and `Plain Paper` radio buttons will become active.

## Form / Plain Paper

If you are printing in landscape view, these are used to indicate on what type of paper you will be printing. If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner ™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.) If you select Plain Paper, the report will print in landscape view with the day planner page “drawn in” around it.

## User

Open the drop-down list to select a user on whom to report. You must have rights to access a user’s calendar to include him or her in your report.

## Current Contact Only

Mark this check box to only include pending activities that are linked to the current contact.

## Activities / To-Do’s / Extended Activities

Mark the check boxes representing the type of activity(ies) you want to include in the report. These check boxes are all marked by default.

## Past Due

Mark this check box if you want to include those incomplete activities with a due date older than the date on which you are reporting (past due). This check box is marked by default.

## Upcoming

Mark this check box if you want to include incomplete activities with a due date later than the date on which you are reporting. This check box is marked by default.

## View

Click **View** to see a preview of the report as it will print, based on your selections. When you have finished previewing, click **OK**.

## Print

Click **Print** to send the report to your printer.

## Fax

Click this button if you want to send the report out with a fax. The Report Description dialog box will open to allow you to name and then save the report for faxing. After the report has been saved for faxing, you can include it in a fax by selecting it from the `Faxable Reports` list in the **Std. Reps** (Standard Reports) area at the Send Fax dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Printing_a_Pending_Activity_Report)<<1}

# The Address/Phone List Dialog Box

## Current Record Only

Mark the `Current Record Only` check box if you want to print the report on the record currently showing in the Contact Manager. Leave it blank if you want to print on all records in a filter.

**Note**

If you mark the `Current Record Only` check box, the `Database`, `Filter`, and `Index` options will be dimmed (unavailable).

## Portrait / Landscape

Select the paper orientation for the report. Portrait view will print with the paper 8 1/2 inches wide by 11 inches high; landscape will print with the paper 11 inches wide by 8 1/2 inches high. If you select Landscape view, the `Form` and `Plain Paper` radio buttons will become active.

## Form / Plain Paper

If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner ™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.)   If you select `Plain Paper`, the report will print in landscape view with the day planner page "drawn in" around it.

## Level Radio Buttons

Select the level containing the records you want to print using the database level radio buttons. The radio buttons will be labeled according to the names of your database levels.

## Database

Open the drop-down list and select the database on which you want to base the report.

## Filter

Open the drop-down list and select a filter for your report. Only records in the selected filter will be included in the report.

## Index

Open the drop-down list and select an index for your report. The report will print in order according to the index selected.

## View

Click **View** to see a preview of the report. When you have finished previewing the report, click **OK**.

## Print

When you are satisfied with your selections, click **Print** to print the report.

## Fax

Click this button if you want to send the report out with a fax. The Report Description dialog box will open to allow you to name and then save the report for faxing. After the report has been saved for faxing, you can include it in a fax by selecting it from the `Faxable Reports` list in the **Std. Reps**

(Standard Reports) area at the Send Fax dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Address_Phone_List_Report)<<1}

# The Contact List Dialog Box

**Note**
This report will use key fields when reporting on contact data, so it is essential that you define your Contact Key Fields in Key Field Preferences. In order for this report to print successfully, each database and level for which you are running the report must have a defined key field for Company and/or Contact, Address 1 and/or 2, City, State, Zip, Primary Phone, and Notepad. (You may still print the report if you do not have a Notepad key field defined.)

## Portrait / Landscape

Select the paper orientation for the report. Portrait view will print with the paper 8 1/2 inches wide by 11 inches high; landscape will print with the paper 11 inches wide by 8 1/2 inches high. If you select Landscape view, the `Form` and `Plain Paper` radio buttons will become active.

## Form / Plain Paper

If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner ™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.) If you select `Plain Paper`, the report will print in landscape view with the day planner page “drawn in” around it.

## Include Notepad

If you have a Notepad Key Field, and would like to include notes from the notepad in the report, leave the `Include Notepad` check box marked. (If you do not have a Notepad Key Field, the `Include Notepad`, `Start Date`, and `End Date` fields will appear dimmed.)

If you do not want notes from the notepad included in the report, unmark the `Include Notepad` check box.

**Note**
If you unmark this check box, the `Start Date` and `End Date` fields will become unavailable.

## Start Date / End Date

If you have a mark in the `Include Notepad` check box, enter the oldest date for memo field entries to be included in the report in the `Start Date:` field, or click the date picker icon to select a date from the Go To Date dialog box. Any notes prior to the specified start date will not be included in the report. If you leave this field blank TeleMagic will start from the very first note in the notepad.

Enter the last date for memo field entries to be included in the report in the `End Date:` field, or click the date picker icon to select a date from the Go To Date dialog box. Any notes subsequent to the specified end date will not be included in the report. If you leave this field blank, TeleMagic will include everything up to the very last note in the notepad.

**Note**
Only dates which have been entered using the Notepad Stamp feature, or matching that format, will be recognized. Notes entered using a different format will be considered part of the previous note. If there are no notes entered in the acceptable format, the entire notepad will print.

## Include Linked Activities

Leave the `Include Linked Activities` check box marked if you want to print a list of any activities in the Activity Manager which are linked to this contact.

Unmark the `Include Linked Activities` check box if you do not want to print a list of activities linked to this contact.

**Note**
If you deselect this check box, the activity radio buttons and the `Start Date` and `End Date` fields will become unavailable.

## All Activities / Completed Only / Pending Only

If you have marked Include `Linked Activities`, select the activities you want to include, based on completion status.

## Start Date / End Date

If you have marked `Include Linked Activities`, enter a date range for the activities you would like included in the report in the `Start Date` and `End Date` fields, or use the date picker icons to select the dates using the Go To Date dialog box.

**Note**
Only activities within the specified date range created by users who have granted you `View Full Details` or `Full Access` rights to their calendars will be included in the report.

## Level Radio Buttons

Select the database level that contains the records you want to include in the report using the database level radio buttons. These radio buttons will be labeled according to the names of your database levels.

## Database

Open the drop-down list and select the database on which you want to base the report.

## Current Record

Mark the `Current Record` check box if you want to print the report for the current record only. If you would like to print for all records in a filter, leave this option unmarked. If you mark `Current Record`, the `Database`, `Filter`, and `Index` options will become unavailable.

**Note**
`Current Record` will be dimmed if you have selected to report on another database.

## Filter

Open the drop-down list to select a filter from the selected database.

## Index

Open the drop-down list to select the order in which you want the records to print.

## Group by Index

The `Group by Index` check box option appears dimmed unless there is an index selected. If you have selected any Index other than None, it will become active. Mark this check box if you want to group your information using the selected index. For example, if you are indexing by City, there will be a page break between each city, with the name of the city appearing as a header on the page.

## View

Click **View** to see a preview of the report. When you have finished previewing the report, click **OK**.

## Print

Click Print to print the report.

## Fax

Click this button if you want to send the report out with a fax. The Report Description dialog box will open to allow you to name and then save the report for faxing. After the report has been saved for faxing, you can include it in a fax by selecting it from the `Faxable Reports` list in the **Std. Reps** (Standard Reports) area at the Send Fax dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Contact_List_Report)<<1}

# The Envelopes Dialog Box

## Envelope

Select your envelope size and style from the drop-down list.

## For:

If you would like to print a single envelope for the current contact only, select `Current record` from the drop-down list. The `Database`, `Filter`, and `Index` options will be unavailable. If you would like to print envelopes for filtered records, select `Filtered records`. If you would like to print envelopes for tagged records, select `Tagged records`.

## Print Return Address

If you would like to include your return address on the envelopes, mark the Print Return Address check box. The Return Address dialog box will open.

> **Note**
> If you should decide you do not want to include a return address, for example if your envelopes contain a pre-printed return address, simply deselect the `Return Address` check box. If you want to edit the entry, deselect this check box, then select it again and the Return Address dialog box will re-appear. Edit your entry and click **OK**.

## Database

If you are printing envelopes for all records in a filter, select a database from the `Database` list.

## Level Radio Buttons

Select the database level that contains the records you want to include in the report using the database level radio buttons. These radio buttons will be labeled according to the names of your database levels.

## Filter

Select a filter for the envelopes you want to print from the `Filter` list.

## Index

Select the order in which the envelopes will print from the Index list. (Hint: If you are printing envelopes for bulk mail, print the envelopes in Zip Code order.)

## View

Click **View** to see a preview of the envelope(s). When you have finished previewing the envelope(s), click **OK**.

## Print

Click Print to print the envelope(s).

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Printing_Envelopes)<<1}

## The (label type) Labels Dialog Box

The title of this box will depend on the menu item you selected to open it.

### Label

Select the appropriate label format for the type of label you are using from the list of options. The available labels will depend on the menu item you selected to open this dialog box. (This field will default to the label which was last printed. If you are not printing on a different type of label, you do not need to edit this field.)

### For:

If you would like to print a single label for the current contact only, select `Current record` from the drop-down list. The `Database`, `Filter`, and `Index` options will be unavailable. If you would like to print labels for filtered records, select `Filtered records`. If you would like to print labels for tagged records, select `Tagged records`.

### Skip first # labels

If the label sheet you are using is not full, specify how many blank spots there are using the `Skip first` field. In the field, enter the number of labels that TeleMagic should skip in order to begin printing on the first label on the sheet. (Labels print vertically from the upper-left corner of the page down the column.)

### Database

If you are printing labels for all records in a filter, select a database from the `Database` list.

### Level Radio Buttons

Select the database level that contains the records you want to include in the report using the database level radio buttons. These radio buttons will be labeled according to the names of your database levels.

### Filter

Select a filter for the labels you want to print from the `Filter` list.

### Index

Select the order in which the labels will print from the `Index` list. (Hint: If you are printing labels for bulk mail, print the labels in Zip Code order.)

### View

Click **View** to see a preview of the label(s). When you have finished previewing the label(s), click **OK**.

### Print

Click **Print** to print the label(s).

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Printing_from_the_Labels_Sub_Menu)<<1}

# The Fax Report Dialog Box

## Start Date / End Date

Use these fields to specify the date range on which you want to report. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

## Queue / Archive

If you want to report on faxes currently in a queue, select `Queue` and then open the drop-down list to select the queue on which you want to report. (If you are not a supervisor user, you will only be shown your own faxes in the selected queue.)

> **Note**
>
> If you select the Local queue, you will be given a report on all faxes sent locally for the current user ID, not the current workstation.

Select `Archive` if you want to report on faxes that have been archived through rebuild at the Automation Server. (If you overwrite the archive file on rebuild, only recently archived faxes will be available for the report.)

## Server

If you have selected to report on archived faxes, or any queue other than Local, the `Server` option will become available. By default, faxes processed by all servers will be included in the report. If you want to report only on faxes processed by a particular server, open the drop-down list and select the server.

## Port

If you have selected to report on archived faxes, or any queue other than Local, the `Port` option will become available. By default, faxes processed by all ports (faxmodems) will be included in the report. If you want to report only on faxes processed by a particular faxmodem, open the drop-down list and select the COM Port to which it is attached.

## User Group / Individual

If you are a supervisor user and have selected to report on archived faxes or any fax queue other than Local, you will be given the option of selecting the users on whom to report. If you would like to report on a group of users, select the `User Group` radio button and choose a user group from the drop-down list. If you would like to report on an individual user, choose the `Individual` radio button and select the user from the drop-down list.

## Include

- Mark the `Detail` check box if you would like to include specific information concerning the faxes in the report. `Detail` will include the date and time the fax was queued and processed, the ID of the user who sent the fax, the user’s name, to whom the fax was sent, and his or her fax number. It will further give you access to the `Document Names` and `Cover Sheet Notes` options.

- The `Document Names` option allows you to include the names of the documents and reports faxed.

- The `Cover Sheet Notes` option allows you to include any cover notes from the faxes.

- Marking `Statistics` includes a statistical summary of the specified faxes. The Statistical Summary groups faxes by their status, giving the actual number of faxes in each status type, the percentage of all faxes each represents, the average time in minutes each type was in the queue, the average time it took for the creation (including merge) of each document in seconds, and the average time it took to process each fax in seconds, with totals. Additionally it provides a breakdown of faxes which failed, grouped by the type of error encountered.

## Report On

From the `Report On` check boxes, choose the status of the faxes on which you want to report. Use these check boxes as follows:

- `All Faxes` will report on every fax, regardless of status. When this is marked, all other options are automatically checked and dimmed. (Unmark `All Faxes` to select an individual status.)

- `Sent` will report on all faxes successfully sent.

- `Failed` will report on faxes which were attempted unsuccessfully.

- `All Pending` will report on all faxes currently in the queue waiting to be processed. When this option is selected, all of the following options are automatically checked and dimmed. If this is not selected, the following options can be chosen individually:

- `Active` reports on the fax(es) currently being processed.

- `Done` pertains to the master fax in a set of filtered faxes. When you send a fax to every contact in a filter, the filter is not expanded until you go into process mode. Initially, what is sent to the queue is a place-holder for the information pertaining to the fax. When the queue is processed, this is expanded to include each contact in the filter. The status `Done` is assigned to that place-holder to indicate that the filter has been expanded.

- `Hold` reports on faxes for which a `Delay Until` time and date have been entered in the Options section of the Send Fax dialog box.

- `Queued` reports on faxes which have not yet been attempted and are in line to be sent.

- `Retry` includes faxes which have been unsuccessfully attempted and are waiting to be tried again.

## View

Click **View** to see a preview of the report. When you have finished previewing the report, click **OK**.

## Print

Click **Print** to print the report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|

proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Fax_Report)<<1}

# The Quick Lists Dialog Box

## Quick List Name

In the `Name` field, type the Quick List name as you want it to appear in the Quick List selection box.

**Note**

The name of a Quick List cannot begin with a blank space. If you try to name it with a leading blank space, TeleMagic will automatically trim that space.

## Use Data from

From this list select the database level for the report. You will be able to use fields from the selected level and its parent level(s); or, if you want to create an activity-based Quick List, select `Activities`.

## Filter

From this list, select the filter you want to use with the records included in your Quick List.

**Note**

If you want to include only the current contact record or all children of the current contact record in your Quick List, you will be able to do so at the time of printing. (These options are not available if you are printing an activity-based Quick List.)

## Index

From this list, select the order in which you would like the records in your Quick List to print.

## Fields

This option opens the Select Fields For Quick List dialog box where you can select the fields that should be included.

## Sample Quick List Field

A sample of your Quick List will be displayed in this field. This field cannot be edited.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT2_Producing_Quick_Lists)<<1}

# The Custom Report Dialog Box

### Name

In the `Name` field, type the report name as you want it to appear in the Custom Report selection box.

**Note**
The name of a custom report cannot begin with a blank space. If you try to name it with a leading blank space, TeleMagic will automatically trim that space.

### Filename

This is the name under which this report will be stored. Either accept the automatically generated name, or type a new name in the field.

### Use Data from

From this list, select the database level for the records on which you will be reporting; or, if you want to create an activity-based report, select Activities.

**Note**
If you are creating a contact-based report, be aware that although you will be able to select fields from all three database levels regardless of which level you select, the report will be based on that level. For example, if you select Level 2, a Level 1 field in the report will pull information from the Level 2 record's parent. A Level 3 field will only pull information from the *first* child record attached to the Level 2 record. It is recommended that you base your report on the lowest database level from which you will be pulling information.

### Filter

If you are printing a contact-based report, select the default filter you want to use for the records included in your report. This can be edited at the time the report is printed. (If you are printing an activity-based report, the filter is selected at the time the report is printed.)

**Note**
If you want to include only the current contact record or all children of the current contact record in your report, you will be able to do so at the time of printing. (These options are not available if you are printing an activity-based report.)

### Index

From this list, select an index for records in your report. This can be edited at the time the report is printed.

### Limit Report Access to Certain Users

Mark this if you want to keep certain users from printing this report. When this is marked, a Select Users dialog box will open where you can select the users who may print this report.

### Select Users

If you are limiting rights to print this report, click this button to edit your user access selections.

### Edit

Choose this to open the Report Generator, and start creating or changing the report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1}

# The About Screen

This screen lets you know your version number, maximum number of users, to whom the software is registered, and the serial number.

Also displayed are phone numbers, street address, e-mail addresses, and Web site addresses for our Technical Support department and our Sales and Customer Service departments.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_TeleMagic_System_Information_Screens)<<1}
TeleMagic System Information Screens

# The Call Notes Dialog Box

When placing or receiving a phone call, you can have information from the call stamped into the contact's notepad, and/or create an activity based on the call (based on your Dialer preferences). Use the Call Notes dialog to control what information is recorded.

## Description

When you place a call, the `Description` will be filled in with `Call to` and the name of the contact you are calling, based on your Key Fields selection for that database. When you receive a call, the `Description` will be filled in with `Call from`. The name of the contact will be offered and highlighted. If this is not correct, start typing and the highlighted portion will be overwritten.

## Call Result (Status)

The `Call Result (Status)` will initially default to `Completed`. This may be edited if necessary. Any changes you make will be retained.

## Type

TeleMagic will automatically place `Call` in this field. If you would like to change this, edit it as necessary. (If you have a list box attached to the `Type` field on the Activity dialog box, place your cursor in this field and press F2 to access that list box.) If you change the type, the new type will be retained.

## Complete Activity

If you are creating an activity based on this call, this is used to determine whether the activity is completed or not. By default this check box will be marked to show that this call has been completed. If you terminate the call and it has not been completed, unmark this check box. (Any changes you make will be retained.)

> **Note**
> If you have not edited the `Call Result (Status)` field, it will read `Completed` if this check box is marked, or `Pending` if it is not.

## Duration

After the call has been terminated, the elapsed time of the call will be displayed above the Comments.

## Comments

Type the notes you would like stamped into the contact's notepad and/or recorded in the `Comments` field of an activity created from this call.

## Stamp

Click this to stamp the date, time, and your User ID in the `Comments` field.

## Paste Contact Info

Click this to stamp the date, time, your User ID, and Key Field information from the current contact into the `Comments` field.

### Terminate

Click **Terminate** if you have finished the call and want to stop the timer, but are not ready to save the call and close the Call Notes dialog box. This allows you to review your notes after completing the call, but before it is saved. (Click **Save** or **Set Recall** when you are ready to close this dialog box.)

### Save

After the call has been completed, click **Save** to save the call and leave the Call Notes dialog box. The call information will be stamped into the contact's notepad and/or an activity will be created from the call. (If you want to set a recall, do not click **Save**. See below.)

### Set Recall

If you want to set a recall for this contact, click **Set Recall**. This will save the call and take you directly to the Set Activity (Recall) dialog box.

### Contact

If you want to view the current contact record during the call, click **Contact**. The Call Notes dialog box will be placed in the background and you will be returned to the Contact Manager. To return to the Call Notes dialog box, click the Call Notes button, select `Call Notes` from the **Office** menu, or press ALT+D.

[To Make an Outgoing Call]
[To Answer the Phone]

# The Goto Dialog Box

The left side of this dialog box allows you to work with the Contact Manager, going to a specific record, level, view, or page, or setting a particular filter or index. The buttons on the right side of the dialog box allow you to quickly go to specific areas of TeleMagic.

## Find

If you are searching for a record based on data in an indexed field (i.e., a field on which an index is based), enter the data you want to use to locate the record in the `Find` text box and set that index using the `Index` drop-down list. For example, if you have an index on the Company field, enter the company name in this field.

## Level

You can use the `Level` list to go to the specified level; or, if you are searching for a record using `Find`, to specify the level on which that record is located. (The `Index`, `View`, and `Page` lists will be populated based on the selected level.)

## Index

You can use the `Index` list to set the specified index in the Contact Manager; or, if you are searching for data using the `Find` field, you can select the index based on the field containing the specified data. For example, if you have entered a company name in the `Find` field, select the Company index. Selecting `Multiple Index Search` from this list will cause TeleMagic to search for the data in the `Find` field in all indexes that have been set up for use with this feature.

## Filter

Use the `Filter` list to set the specified filter in the Contact Manager. Alternatively, if you want to search for a record based in data for which there is no index, you can select `Field Search...` from the list. The Field Search dialog box will open where you can define the data on which you want to search and select the field containing that data.

## View

Use the `View` drop-down list to set the specified view in the Contact Manager.

## Page

Use the `Page` drop-down list to go to the specified page in the Contact Manager.

## Database

Clicking this button will open the Select Database dialog box, where you can go to another database.

## Notebook

Clicking this button will open the Notebook Record dialog box where you can work with your Notebook records.

## Marked record

Clicking this button returns you to the record you have marked using the `Marked` check box on the Contact Manager Toolbar. If you have marked multiple records, you will be taken to a Select Marked

Record dialog box.

## Pending Activities

Clicking this button opens the Pending Activities List dialog box, allowing you to view, edit, dial, and add to your list of currently incomplete To-Dos and activities.

## Contact browse

Clicking this button will open a Browse screen showing names of fields and corresponding data for each record based on the level you selected.

## Last record added

Clicking this button takes you to the last record added to the current level of the database you selected.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Goto)<<1}

# The Wireless Messaging Dialog Box

**Note**
Contact information will appear by default in the memo field if you have selected Paste Current Contact Info in Wireless Messaging Preferences.

## Message area
Enter the contents of your message in the message area using standard word processing commands.

## Page
Clicking this button will send the wireless message.

## Paste Cont. Info
Clicking this button will include contact information from the current contact record in your wireless message. Contact information will be appended to the end of the current text.

## Options
This opens the Wireless Messaging Options dialog box.

Queue
Select the queue you will be using to send the wireless message from the drop-down list. If you will be sending the message locally, select **Send Immediately (Local)**.

## Send To   (User / User Group)
Send the message to an individual user or a user group. When a user group is selected, the message will be sent to every user in the user group with wireless messaging information entered into his or her User Preferences.

Open the drop-down list box in the Send To field to select a user or a user group to receive the message. (If you have selected User, this list will include all users who have Wireless Messaging set up in their User Preferences. If you have selected User Group, all user groups will be included in this list. Users in the group who do not have wireless messaging set up in Preferences will be disregarded when the message is sent.)

## Manual Entry vs. Automatic Entry
If you are sending a wireless message to a user, after you have selected a user from the drop down list, that user's Pager # (carrier phone number) and Pager ID (pager PIN) will appear in the Pager # and Pager ID fields. If you have selected a user group, these fields will be blank and unavailable for editing. TeleMagic will read each user's wireless messaging preferences as the messages are sent. If you have selected Manual Entry, you must complete these fields.

If you are sending a wireless message to a contact, and the database has been changed to allow for pager field prompts, that contact's Pager # (carrier phone number) and Pager ID (pager PIN) will appear in the Pager # and Pager ID fields.
To manually send a page to an individual, make sure the `User` radio button is active and leave Manual Entry selected. Enter the Pager # and Pager ID of the individual to whom you want to send the message.

## Message Length / Update

The message length will be displayed at the bottom of the dialog box as soon as you move out of the memo field.

If you want to view the message length before moving out of the memo field, click **Update** to cause the message length to adjust to reflect your message.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WIRE_How_to_Use_Wireless_Messaging)<<1}

# The Add Note Dialog Box

The Add Note dialog box provides a text area for your note, pre-stamped with the date, time, and your User ID.

### Text Field
Enter the note in this field.

### Memo
This drop-down list displays all of the memo fields on the current level and higher (the current contact’s parent records). The drop-down list will default to the Notepad field selected in Contact Key Fields for the current level.

### View Notes
Mark this checkbox to open a display of current notes. This information can be copied, but cannot be edited.

### Stamp
Click this button to add the current date, time, and user ID to the note.

### Save
Clicking this button saves your entry to the currently selected memo field.

### Cancel
Clicking this button exits without saving.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Using_the_Control_Bar_s_Add_Note_Button)<
<1}

# The Notepad Dialog Box

The memo field being displayed will default to the Notepad field selected in Contact Key Fields for the current level.

### Text Field

Current notes are displayed in this field. You can add to this field, and you can edit existing entries.

### Memo Fields

This drop-down list box provides all of the memo fields on the current level and higher (the current contact's parent records). If you do not want to work with the default Notepad field, select the memo field you would like to view from the Memo Fields drop-down list.

### Stamp

Click this button to add the current date and time to the current Notepad.

### Save

Clicking this button saves your edits to the currently selected memo field and exits the Notepad dialog box. You will be returned to the Contact Manager.

### Cancel

Clicking this button exits and returns you to the Contact Manger without saving your edits.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Using_the_Control_Bar_s_Notepad_Button)<<
1}

## The Activity List Dialog Box

### List activities for the current contact that are (Incomplete / Complete / Both)

Select the appropriate radio button for the type of activities you want to view.

### Text field (Due Date / Type / User / Description / Status)

Includes the activity's due date, type, description, status and the User ID of the user who created it.

### Ascending/Descending

If you would like to see your activities in order with the oldest first, select the `Ascending` radio button. If you would like to see your activities in order with the most recent first, select the `Descending` radio button.

### To Activity

Click this button to go to the highlighted activity.

### Add

Clicking this button creates a new Activity and opens the Activity Dialog Box.

### Edit

Clicking this button opens the selected Activity in edit mode.

### Complete

Click this button to change the status of the selected activity to Complete.

### Delete

Click this button to delete the selected activity.

### Close

Clicking this button closes the Activity List Dialog Box without saving.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Activity_List)<<1}

# The Linked Documents Dialog Box - Linked Documents Page

This dialog box displays the documents that are linked to the current contact record.

### Tabs

Use the tabs to select the desired page.

### Document Title / Created On / User ID / Location

This area shows each document's description, when the document was created, the User ID of the user who created the document, and the list that contains the document (user, global, or database).

### Print

Select this to print a copy of the highlighted document for this contact.

### To Word Processor

Click this button to go to the Word Processor Document selection box to view, print, or edit the document. The Word Processor Document selection box will open, with the same document highlighted as was highlighted in the Linked Documents dialog box.

### History

Click this button to view a history of documents that have been printed or faxed for this contact record. The Document History dialog box will open.

### Close

Click this button to return to the Contact Manager.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# Merged Documents Page

### Document Title / User / Location / Date / Time

This area shows each document’s description, the user who created the document, the list that contains the document (user, global, or database), and when the document was created. Only documents that are linked to the current contact are listed.

### Edit

Opens the selected document for editing.

### Print

Select this to print a copy of the highlighted document for this contact.

### Delete

Click this button to delete the selected document.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# The Setup Accounting Link Dialog Box

### Accounting Package

Open the drop-down list box and select the accounting application to which you want to link this database. Access to link to any accounting applications with TeleMagic must be provided by the accounting application. At the time this documentation was written, only DacEasy (TM) 3.0 has provided a link to TeleMagic.

### Accounting Path / Find

TeleMagic will offer a default path to the selected accounting package in the Accounting Path field. Edit this path if necessary, or click the Find button to search for the path using the Windows Select Directory dialog box.

### Default Company

In the Default Company field, open the drop-down list to select the company in the accounting application to which you want to link.

### Level to Link to

In the Level to Link to drop-down list, select the level of the TeleMagic database to which you would like to link. (This should be the level on which you store your company records.)

### Update accounting address information when editing TeleMagic (Automatically / Prompt User / No Update)

Select the appropriate radio button to control how the accounting application is updated with changes made in TeleMagic (Only edits made to records on the level to which you are linking will be updated):

“Automatically” updates from TeleMagic to the accounting application whenever you save edits to a linked TeleMagic record. If selected, as soon as you click Save after making edits to a linked record in TeleMagic, TeleMagic will automatically update the corresponding record in the accounting application.

“Prompt User” sends users a prompt giving them the opportunity to update a linked record in the accounting application with changes made to the corresponding TeleMagic record. If selected, as soon as you click Save after making edits to a linked record in TeleMagic, a prompt will give you the option of copying those edits to the corresponding record in the accounting application.

“No Update” should be selected if you do not want changes to address information made in TeleMagic updated in the corresponding record in the accounting application.

### Create Link

A message will appear informing you that fields will be added to your database and a rebuild will be performed. Make sure you have a valid backup before proceeding.

If you have not performed a recent backup of your TeleMagic installation, select No at the message; or, if you have a valid backup, click Yes to continue. When you click Yes, a message will appear confirming that you want to add the accounting fields to your database.

If you want to abort the linking process and not alter your database structure, click No. If you want to allow TeleMagic to alter your database structure and continue with the link, click Yes. The fields will be added and a rebuild will be performed. A pop-up will appear notifying you of the progress of the rebuild. When the rebuild is complete, you will be given the option of transferring records from your accounting application to TeleMagic.

If you do not want to transfer your accounting application records into TeleMagic, click No. A message will appear informing you that the database link is complete and that no records have been linked. If you would like to transfer existing accounting records into TeleMagic, click Yes at the Transfer Records pop-up.

## Cancel

Click this button to return to the Contact Manager without creating the link.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½LINKS2_Setup)<<1}

# The Document History Dialog Box

## Type / Document / Title / Printed On / User

The list of documents printed or faxed for the current contact is generated from the related activities. In order for a document to be reflected in this list, the user who printed the document must have Create Activity When Printing selected in Writing Preferences, or have Create Activity selected in Fax Preferences and marked on the Send Fax dialog box for faxed documents. Documents will be listed with the most recently sent at the top of the list.

## Ascending/Descending

If you would like to see your documents in order with the oldest first, select the `Ascending` radio button. If you would like to see your documents in order with the most recent first, select the `Descending` radio button.

## View Detail

To view details taken from the related activity for a document, highlight the document and click View Detail. The Document History Detail dialog box will open.

## Close

Click Close to return to the Linked Documents dialog box.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# The Document History Detail Dialog Box

## Description

This shows the description of the document being viewed.

## Date Printed / at

This is the date and time that this document was last printed.

## Type

This is the type of document being viewed. The types available are Letter and LetterFax.

## Printed By

The user ID of the user who printed the document.

## Document Notes

Enter any additional comments in the Document Notes window.

## Close

Click Close to return to the Document History dialog box.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# The Resource Maintenance Selection Box

### Reports

Clicking this button brings up the Resource Reports dialog box.

### Close

Clicking this button closes the Resource Maintenance dialog box and returns you to the Contact Manager.

### Add

Clicking this button opens the Add Resource dialog box.

### Change

Clicking this button opens the Edit Resource dialog box.

### Delete

Clicking this button will bring up a Yes or No prompt asking whether you want to delete the highlighted resource.

### Copy

Clicking this button opens the Copy Resource dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Resource_Management)<<1}

# The Spell Checker Preferences Dialog Box

### Ignore Uppercase Words

Selecting this option will cause the Spell Checker to skip any words which are entirely in capital letters.

### Ignore Words Containing Numbers

Selecting this option will cause the Spell Checker to skip any words which contain any numbers.

### Auto suggest

Mark this check box to have the Spell Checker suggest options for words it does not recognize.

### Recheck Replaced Words

Select this option to have the Spell Checker verify the spelling of any words that you enter manually in the course of performing the spell check.

### OK

Click this button when you are satisfied with your selections.

### Cancel

Click this button to close the Spell Checker Preferences dialog box without saving your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALC_Spell_Checker)<<1}

# The Resource Reports Dialog Box

### Report (List / Schedule)

Choose the `List` radio button if you would like to print a list of all resources with their availability.

Choose the `Schedule` radio button to print a report that lists when the resources are in use and by whom.

### Dates (From / To)

If you selected the `Schedule` radio button, specify the date range on which you would like to report. Enter the dates in the From and To fields, or use the Date Picker icons to select the dates from a Go To Date dialog box.

### Resource

Open the drop-down list box and select the resource you want to report on.

### View

If you want to preview the report, click this button. The Page Preview dialog box will open. After viewing, click **OK** to return to the Resource Reports dialog box.

### Print

Click this button to send the report to the printer.

### Close

Click this button to close the Resource Reports dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_To_Print_the_List_of_Resources)<<1}

# The Add Resource Dialog Box

### Resource
Enter a descriptive name for the resource in the field.

### Hours Available (From / To / Always Available)
In this area, enter the time span during which the resource is available in the From and To fields, or click the Go to Time icons and select the times it will be available. If your resource can be accessed 24 hours a day, mark the Always Available check box. This will also cause the From and To fields to be unavailable for editing.

### Days Available
Mark the days on which the resource may be used. For example, you may want to unmark the check boxes corresponding to your established weekend days.

### OK
Click this button when you are satisfied with your selections.

### Cancel
Click this button to close the Add Resource dialog box without saving your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_To_Establish_a_List_of_Resources)<<1}

# The Edit Resource Dialog Box

### Resource
Change the descriptive name for the resource in the field.

### Hours Available (From / To / Always Available)
In this area, enter the time span during which the resource is available in the From and To fields, or click the Go to Time icons and select the times it will be available. If your resource can be accessed 24 hours a day, mark the Always Available check box. This will also cause the From and To fields to be unavailable for editing.

### Days Available
Mark the days on which the resource may be used. For example, you may want to unmark the check boxes corresponding to your established weekend days.

### OK
Click this button when you are satisfied with your selections.

### Cancel
Click this button to close the Edit Resource dialog box without saving your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_To_Maintain_the_List_of_Resources)<<1}

# The Copy Resource Dialog Box

### Copy resource “resource name” to

Enter a unique name for the new resource in the space provided.

### OK

Click OK when satisfied with your selection.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_To_Maintain_the_List_of_Resources)<<1}

## The Holiday Maintenance Selection Box

### Print
Clicking this button will print the selected holiday.

### Close
Clicking this button will close the Holiday Maintenance selection box.

### Add
Clicking this button will open the Add Holidays dialog box.

### Edit
Clicking this button will open the Edit Holidays dialog box. Make any necessary changes and click **OK** when satisfied.

### Delete
Clicking this button will open the Delete Holiday dialog box.

### Copy
If you would like to add a holiday based on an existing one, highlight the existing holiday and click Copy. It will appear on the list with the same date as the original but will say “Copy of” at the beginning of the name.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Holiday_Maintenance)<<1}

# The Add Holidays Dialog Box

### Date
Enter the date of the holiday in this field, or click the Date Picker icon to select a date.

### Description
Enter a description of the holiday in this field.

### Warn when scheduling on this holiday
Select this radio button if you would like to receive a warning when attempting to schedule an activity on this holiday.

### Allow scheduling on a holiday
Select this radio button if it does not matter if activities are scheduled on this date.

### Recurring Annually
Mark this check box if the holiday occurs on the same date annually. If this check box is marked, you can then select the number of years you would like this holiday to repeat using the spinner arrows on the years list, or enter a number.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Holiday_Maintenance)<<1}

## The Delete Holiday Dialog Box

### Currently Highlighted
Select this radio button to permanently delete only the highlighted holiday.

### Date Range
Select this radio button to delete all of the holidays in a specific date range. If this radio button is selected, the Start and End Date fields will become available.

### Start Date / End Date
Select the beginning and ending dates to delete all of the holidays in a specific date range.

### Delete
When you are satisfied with your choice, click this button to delete the holiday(s).

### Cancel
Click this button to close the Delete Holiday dialog box without deleting any holidays.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_To_Maintain_the_List_of_Holidays)<<1}

# The Fax Maintenance Dialog Box

This dialog box is used for local faxing only.

### Resend
Clicking this button allows you to reprocess the highlighted local fax.

### Show Doc.
Click this button to view the fax document.

### Detail
Clicking this button opens the Fax Detail dialog box.

### Delete
Clicking this button brings up a Yes or No prompt asking if you want to delete the highlighted fax.

### Delete All
Clicking this button brings up a Yes or No prompt asking if you want to delete all faxes.

### Close
Clicking this button returns you to the Contact Manager.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Local_Fax_Maintenance)<<1}

# The Fax Detail Dialog Box

This dialog box will show you the status of the fax, who it was sent to, the subject of the fax, the fax number, the date and time of the fax, the time it took to process, and error description.

## Cover Comments

Add comments about this fax.

## OK

When satisfied with the information, click OK to exit.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX1_Using_the_Fax_Feature)<<1}

# The Wireless Messages Maintenance Dialog Box

## Resend

Highlight the wireless message and click this button to resend.

## Show Detail

If you want to view details on any of the messages displayed, highlight it and click this button. A new screen will appear showing the text of the wireless message, the Send To, Pager #, Pager ID, Status, Error Description, and the Sent On (date and time the wireless message was sent) information.

## Delete

If you want to delete one of the displayed wireless messages, highlight it and click Delete.

## Delete All

If you want to delete all of the displayed wireless messages, click Delete All.

## Close

To return to the Contact Manager, click Close.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WIRE_Accessing_Wireless_Messaging_Maintenance)<<1}

# The Rollover Activities Dialog Box

## Start Date / End Date

In these fields, enter the date range for the activities you would like to roll over, or use the Date Picker icons to select the dates from a Go To Date dialog box.

## Rollover your activities

Use this field to specify how many days forward you would like to move your activities. Enter the number of days in the field, or use the spinner arrows to select the number. Be aware that, unless you have selected to roll your activities over in complete weeks (multiples of 7), activities previously scheduled on a week day may now fall on a weekend.

## Move weekend or holiday activities to nearest workday

Mark this check box if you would like any activities falling on a weekend or holiday moved to the next workday. If you would like to schedule activities on the weekends and holidays leave this check box unmarked.

## Rollover

Clicking this button will start the rollover processing. A message will appear asking you to confirm your decision to roll over the activities. Click **Yes** to proceed or **No** to abort. Only incomplete activities will be rolled over. A message will appear informing you when it is completed.

## Cancel

Clicking this button will return you to the Contact Manager.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND2_Activity_Rollover)<<1}

# The Reassign Incomplete Activities Dialog Box

## From user

Open this drop-down list box to select the user whose activities you would like to reassign. This list will default to your own name, or you can select from a list of users who have granted you full access to their calendars.

## To user

Open this drop-down list box to select the user to whom you would like to assign the activities.

## Incomplete Activities (All / by Date Range)

If you would like to reassign all incomplete activities belonging to the user selected in the From user field to the user selected in the To user field, select the `All` radio button. (This is useful when the user receiving the activities is taking over the former user's position.)

Select the `by Date Range` radio button if you would like to limit the activities that are reassigned to those falling within a specified date range. (This is useful for users who are overburdened or who will be unavailable for a given time period, such as while on a vacation.) Enter the date span in the From and To fields, or use the Date Picker to choose the dates from a Go To Date dialog box.

## Reassign

When you are satisfied with your choices, click Reassign. A message will appear asking you to confirm your decision to reassign the activities. Click Yes to proceed, or click No to abort. If you click Yes, the activities will be reassigned. A message will appear informing you when reassignment is complete.

## Close

Clicking this button will return you to the Contact Manager.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND2_Reassign_Incomplete_Activities)<<1}

## The Filters Selection Box

This lists all available filters.

### Select
Click this button to select the highlighted filter.

### Close
Clicking this button will close the Filters selection box.

### Analyze
Clicking this button will open the Select Filters to Analyze dialog box.

### Add
Clicking this button will add a new filter.

### Change
Clicking this button will change the highlighted filter.

### Delete
Clicking this button will delete the highlighted filter.

### Copy
Clicking this button will open the Copy a Filter dialog box.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT4_Filtering)<<1} Filtering

## The Filters Dialog Box

### Filter Name

Enter the name of the filter.

### Edit

Clicking this button will open the Filter Expression dialog box.

#### Note

You must name a filter before attempting to open the Filter Builder.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Creating_Filters)<<1}

## The Duplicate Record Checking Dialog Box

### Search for duplicates using index

If you have created indexes to search for duplicate records, select an index from the drop-down list box.

### Only find duplicates within filter

To limit your search to a specific group of records, select a filter from the drop-down list box.

### Disregard blank entries

If you would like TeleMagic to ignore records that have no entry in the field(s) used by the index, mark this check box. If you do not mark this check box and you have more than one record with no information in this field, the records will be viewed as duplicates.

### OK

A message will appear informing you that any existing tags in the database will be cleared and asking if you would like to continue. Click **Yes** to continue or click **No** to abort and return to the Duplicate Record Checking dialog box.

If you click **Yes**, the duplicate processing will continue. TeleMagic will search the database and tag the records it believes are duplicates. A pop-up message will appear asking if you would like to view the duplicates now. Click **Yes** to view the duplicates, or click **No** to return to the Contact Manager. TeleMagic will return to the Contact Manager and automatically change the filter to Tagged Records. If the current contact record is one of the tagged records you will return to it. If the current contact record is not one of the tagged records, you will be taken to the first record in the Tagged filter.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Duplicate_Record_Checking)<<1}

# Activity/Recall Type

## Create activities (recalls) in the Activity Manager

Select this radio button to open the Set Multiple Activities for (level name) Level dialog box and create the activities in the Activity Manager.

## Create recalls using the Recall (RCL) field on this level

Select this radio button to open the Set Multiple Recalls for (level name) Level dialog box and create the activities in the Contact Manager. Recalls created in this way will be indicated in the RCL field.

# The Set Multiple Activities for (level name) Level Dialog Box

### Use this Filter
Open the drop-down list and select a filter.

### Use this Index
Open the drop-down list and select an index.

### Start Date
Enter the date to begin your activity, or select the date from the Date Picker icon.

### Schedule every
Using the spinner arrows or entering a number, select how many minutes you want to pass between activities/recalls.

### Time Range (Start Time / End Time)
Enter a Start Time and an End Time for your activities. You may use the Time Picker icons for convenience.

### Exclude this Time Block (From / To)
Mark this check box and then enter the From and To times when you will not be available for scheduling.

### Setup User and Scheduling Options / Setup Options
Click the **Setup Options** button to open the Users and Scheduling Options dialog box.

### Activity Type
Enter the type of activity, or press F2 to open the Type list box.

### Activity Priority
Select a priority from 1 to 3.

### Alarm
If you would like advance notification, mark the Alarm check box.

### Lead Time
When the Alarm check box is marked, the Lead Time field will become available. Enter the amount of advance time you would like to use for the alarm, or use the spinner arrows.

### Clear LCL Field
This check box is available if the Activity Type is Call and you have a field called LCL. If you do have an LCL field and would like to delete the current contents of the LCL field for all contacts in the selected filter, mark this check box.

## Skip contacts with pending activities after

If you do not want to schedule an activity for contacts who already have a recall scheduled, mark this check box and then enter a date in the date field. This will skip those contacts that have an activity with the same Activity Type as you entered in this dialog box.

## Stamp contacts' notepads with activity information

Select this option to include basic activity information in the contacts' notepad.

## Schedule

Click this button and a confirmation pop-up will appear. Click **Yes** and TeleMagic will begin to schedule the activities. A status bar will apprise you of the progress. If you click **No**, you will return to this dialog box.

## Cancel

Return to the Contact Manager without adding any new activities.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_To_Set_Multiple_Activities_Recalls_from_the_
Contact_Manager)<<1}

# Set Multiple Recalls for (level name) Level Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½ )<<1}

### Use this Filter

Open the drop-down list and select a filter.

### Use this Index

Open the drop-down list and select an index.

### Start Date

Enter the date to begin your activity, or select the date from the Date Picker icon.

### Schedule every

Using the spinner arrows or entering a number, select how many minutes you want to pass between activities/recalls.

### Time Range (Start Time / End Time)

Enter a Start Time and an End Time for your activities. You may use the Time Picker icons for convenience.

### Exclude this Time Block (From / To)

Mark this check box and then enter the From and To times when you will not be available for scheduling.

### Schedule for:

Select either All Records or First. If you select First, enter the number of records that the recall should be scheduled for in the numeric field. You can either enter the number directly, or use the spinner arrows.

### Clear LCL field

If you have an LCL field and would like to delete the current contents of the LCL field for all contacts in the selected filter, mark this check box.

### Skip contacts with pending activities after

If you do not want to schedule an activity for contacts who already have a recall scheduled, mark this check box and then enter a date in the date field.

### Schedule

Click this button to schedule the recalls.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLPï¿½CONTACT4_To_Set_Multiple_Contact_Based_Recalls)<<1}

# The Preview of Distribution of Assigned Activities Dialog Box

## User List

This is the list of users who are currently set to receive multiple activities. To the right of the user name is the number of activities that they will receive based on the settings made in the Users and Scheduling Options dialog box.

## Print

If you would like to print this list of users and the number of activities that will be assigned, mark the Print check box.

## OK

Click this button to return to the Users and Scheduling Options dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# The Contact Information Dialog Box (Reports)

This dialog box tells TeleMagic what information to include from the contact record Key Fields for the report you are creating. The Key Fields must be set in Preferences for this information to be included properly. Mark the check boxes of those Key Fields you would like included in the report.

Click **OK** when you have selected the required Key Fields.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½PREFS_Key_Field_Preferences)<<1}

# The Report Description Dialog Box

### Report Name

The Report Name is automatically extracted from the report you selected.

### Please enter a description for this report

Enter a name to describe the contents of the report.

### OK

Click this button to start processing the fax version of this report.

### Cancel

Click this button to return to the previous dialog box without creating the fax document.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1}

# The List Box Reports Dialog Box

## Current Field Only

If the field in which your cursor is currently positioned has a list box assigned to it and you want to report only on this field, mark this check box.

## Database Level Radio Buttons

If you want to include the list boxes from all fields in a database, select the Level on which you want to report from the available radio buttons.

## Database

If you are reporting on all fields in a database, open the drop-down list box and select the database on which you want to report. This list will default to the current database.

## View

Click this button to preview the report.

## Print

Click this button to print the report.

## Close

Click this button to return to the Contact Manager.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_List_Box_Report)<<1}

## The User Monitor Browse Screen

This option opens a Browse window displaying all of the users currently using this installation of TeleMagic.

The Browse window displays the User ID, the User Name, and the Database in which the user is currently active.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_User_Monitor)<<1}

# The System Information Dialog Box

## Tabs

Select the tab corresponding to the internal TeleMagic system information you want to review. The selected page will open displaying the desired information.

### Note

Some of the information may include special characters that will not appear properly in this dialog box. An example of this is the Contact ID found in the Current Record topic.

## Close

Click this button to return to the Contact Manager.

## Print

Click this button to print a report on the information accessible from the System Information dialog box.

## Fax

Click this button to print the information accessible from this dialog box to the fax printer driver. You will be able to include this information with a fax using the Standard Reports option on the Send Fax dialog box. (See Faxing Standard Reports for more information.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_System_Information_Screen)<<1}

# The Timeslips Link Preferences Dialog Box

## TeleMagic Database

This field will display the current TeleMagic database.

## TeleMagic Level

This field displays the TeleMagic database level linked to Timeslips.

## Timeslips database

Enter the path to the Timeslips database to which you will be linking, or click the **Find** button to locate it using a Windows Open dialog box. (Timeslips databases end in the file extension .SLP.)

## Synchronizing changes from TeleMagic to Timeslips

Once the databases are linked, TeleMagic will need to know how you would like to synchronize changes between TeleMagic and Timeslips.

Use the following guidelines to select the appropriate option to tell TeleMagic when to update Timeslips with changes made to TeleMagic records:

## Add (create linked Timeslips record)

If you would like a linked record to be added to Timeslips whenever you add a TeleMagic record in the linked database, select the `Yes` radio button. If you would like to be prompted with the option to add a linked record, select the `Ask` radio button. If you do not want to have a linked record added to Timeslips when you add a TeleMagic record, select `No`.

## Edit (change linked Timeslips record)

If you would like edits made to a TeleMagic record to be duplicated in the linked Timeslips record, select the `Yes` radio button. If you do not want changes to be synchronized with the Timeslips record, select the `No` radio button. If you want to be prompted to save the changes to the linked Timeslips record when you save edits to a record in TeleMagic, select the `Ask` radio button.

## Complete Activity (create Timeslips slip record)

If you would like a slip to be created in Timeslips whenever you complete an activity for a TeleMagic contact who has a linked Timeslips record, select the `Yes` radio button. If you do not want a slip created in Timeslips, select the `No` radio button. If you would like to be prompted when you complete a linked activity to create a slip based on that activity in Timeslips, select the `Ask` radio button.

## Synchronizing changes from Timeslips to TeleMagic

Select the appropriate options to tell TeleMagic how to synchronize changes made to Timeslips records with the corresponding records in TeleMagic.

## Add (create linked TeleMagic record)

If you would like all new Timeslips records to automatically be added to TeleMagic during synchronization, select the `Yes` radio button. If you do not want to have a linked record added to TeleMagic during synchronization, select `No`. If you would like to be prompted with each added record when performing a synchronization, and given the option of adding it to TeleMagic or rejecting it, select the `Ask` radio button.

## Edit (change linked TeleMagic record)

If you would like all edits made to Timeslips records to automatically be made to the TeleMagic records during synchronization, select the `Yes` radio button. If you do not want changes to be synchronized, select the `No` radio button. If you want to be prompted with each change during synchronization, and given the option of effecting the change in the linked TeleMagic record or rejecting it, select the `Ask` radio button.

## Delete (remove linked TeleMagic record)

If you would like all linked records removed from your Timeslips database to also be removed from your TeleMagic database during synchronization, select the `Yes` radio button. If you do not want records deleted from TeleMagic during synchronization, select the `No` radio button. If you would like to be prompted with each deleted record during synchronization, and given the option to delete or keep it in TeleMagic, select the `Ask` radio button.

## Prompt to process changes when opening a TeleMagic database

Mark this check box if you would like to receive a prompt giving you the option of performing a synchronization of changes from Timeslips into TeleMagic whenever you open a linked TeleMagic database.

## OK

Click this button to save your selections and create the link.

## Cancel

Click this button to close the Timeslips Link Preferences dialog box without saving the changes.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½LINKS1_Linking_a_Database_to_Timeslips)<<1}

# The Timeslips Link Established Dialog Box

Once you have set up a link to the Timeslips database and selected a Timeslips user that corresponds to your TeleMagic user, this dialog box will open.

### Import

Clicking this button will instruct TeleMagic to create a new database record for each record in the linked Timeslips database. After the import has been completed you will be returned to the Contact Manager.

### Export

Clicking this button will create a new database record in Timeslips for each record in the linked TeleMagic database. After the export has been completed you will be returned to the Contact Manager.

### Done

Clicking this button will return you to the Contact Manger.

## The Change User Dialog Box

This dialog box allows you to select a Timeslips user that corresponds to your TeleMagic user. Highlight the appropriate Timeslips user and click **OK**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½LINKS1_Matching_Users)<<1}

## The TeleMagic Automation Server Screen

The status of items on the Automation Server Screen can be determined by the color of each line:

- Red Failed
- Green Processed Successfully
- Yellow Active
- White Queued or Merged (Process not yet attempted)

Note that when an item is selected, it will be displayed in inverse color. If you see an item on the screen with a color other than one of those listed, select another item to see the actual color.

### Status

The fields in this column indicate the status of each fax in the queue

### From

The fields in this column indicate the user ID of the originator of each fax.

### Port

The fields in this column indicate the port used to send the fax.

### By

The fields in this column indicate the server which processed the fax.

### To

The fields in this column indicate the recipient of the fax.

### Subject

The fields in this column indicate the subject of the fax as entered in the Fax dialog box by the originator of the fax.

### Number

The fields in this column indicate phone number for the fax.

### Date

The fields in this column indicate the date that the fax was originally sent.

### Last Attempt

The fields in this column indicate the date and time there was an attempt to send the fax.

### Print / Process / Monitor

This button will vary depending on the current queue, and whether or not you have a server selected.

If your current queue is named Print, this button will read **Print**.

If you have no server selected, and your queue is set to anything other than a queue named Print, this button will read **Monitor**. When clicked, you will be able to monitor the progress of a queue currently being processed by another workstation.

If you have a server selected, this button will read **Process**. When clicked, you will go into Process mode and TeleMagic will begin to send the items contained in the current queue.

### Queue

Use the Queue button to set up or select your queues.

### Maintenance

Select this button to access the TeleMagic Automation Server Maintenance screen, where you maintain the currently selected queue.

### Setup

Clicking this will open the Automation Server Setup screen where you can select and edit your servers.

### Configure

Clicking this button opens the Modem Configuration dialog box, which will allow you to configure your faxmodems.

### Rebuild

Clicking this button opens the Choose Rebuild Options dialog box, which will allow you to set up and start your Automation Server rebuild.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_The_TeleMagic_Automation_Server)<<1} The TeleMagic Automation Server

# The Queue Edit Dialog Box

Queues are established by selecting the queue and giving it a name. By default there are three queues already set up when you start TeleMagic Enterprise:

Queue #1, named TeleMagic Fax Q by default, will be ready for use as soon as you install the program.

Queue #5, named Print Queue by default, will allow users to queue word processing documents to be processed by the server.

Queue #10, named Local Faxes by default, stores data about TeleMagic faxes that were sent directly from users' workstations without using the Automation Server. It is mainly useful for generating reports. If you do not need to have a queue dedicated to merely recording local faxing activity, you can rename queue #10 at any time. (Should you decide that you want to use the local fax tracking feature later, simply rename queue #10 so that it starts with the word Local.)

**Note:** Queue #1 and Queue #10 cannot be deleted. You may change the current name, but you may not remove the name.

### Queue Name

This field becomes active when you click Edit. Use it to add, edit, or delete queues.

### Select

Clicking this button will cause the currently highlighted queue to become active for this workstation. You can have multiple servers connected to the same queue simultaneously.

### Edit

Clicking this button will allow you to edit the name of the currently highlighted queue. If you highlight a queue number which does not currently have a name, entering a name in the Queue Name field will activate that queue. If the queue is currently established with a name, you will be able to change or delete the name. Deleting the name will cause the queue to be de-activated. This will not delete items already in the queue, but they will be inaccessible until you give the queue a name again. (You cannot delete the name from Queue #1 or Queue #10.)

### Save

Clicking this button will save new queues or implement the changes made in the Queue Name dialog box.

### Close / Cancel

Clicking this button will return you to the TeleMagic Automation Server screen.

When you are adding or editing a queue the **Close** button will change to a **Cancel** button. Click **Cancel** to discard the changes to the queue. The **Cancel** button will change back to a **Close** button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_Up_a_Queue)<<1}

# The TeleMagic Automation Server Maintenance Screen

## Status

The fields in this column indicate the status of each fax in the queue

## From

The fields in this column indicate the user ID of the originator of each fax.

## Port

The fields in this column indicate the port used to send the fax.

## By

The fields in this column indicate the server which processed the fax.

## To

The fields in this column indicate the recipient of the fax.

## Subject

The fields in this column indicate the subject of the fax as entered in the Fax dialog box by the originator of the fax.

## Number

The fields in this column indicate phone number for the fax.

## Date

The fields in this column indicate the date that the fax was originally sent.

## Last Attempt

The fields in this column indicate the date and time there was an attempt to send the fax.

## Edit

Clicking this button allows you to edit the currently highlighted item.

## Delete

Clicking this button will bring up a dialog box where you can select to delete all tagged items or the currently highlighted item.

## Requeue

Clicking this button will bring up a dialog box where you can select to requeue all tagged items or the currently highlighted item.

## Tag

Clicking this button will tag the currently highlighted item. An asterisk (*) will appear next to the tagged item.

## Tag Opts
Clicking this button will bring up the Tag Options dialog box where you can tag groups of items.

## Goto
Clicking this button will bring up the Goto dialog box. Here you can set an index by date, user and/or status and go to the first item which matches these criteria.

## Print
Clicking this button will allow you to print a hard copy of the currently highlighted item or all tagged items.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Maintaining_Queues)<<1}

# The Automation Server Setup Screen

## Server ID
The Server ID column lists the IDs of all of the servers you currently have set up.

## Fax Directory
The Fax Directory column lists the directory where each server stores its temporary working files.

## Idle Time
The Idle Time column displays the Processing Pause time established for each server.

## Retries
The Retries column displays the setting established for each server controlling the number of times an item should be attempted before it is failed.

## Dial Prefix
The Dial Prefix column displays the number established for each server which is needed to access an outside line.

## Local Prefix
The Local Prefix column displays the local area code which was established for each server.

## Long Distance
The Long Distance column displays any numbers which need to be added in front of a fax or pager number when placing a long distance call for each server.

## Select
To use a particular server on the current workstation, highlight it and click Select. You will return to the main Automation Server screen with the specified server selected, as well as the queue which was last in use for this server.

### Note
You cannot select the same server on more than one workstation. If a server is currently in use at another workstation, when you highlight it and click Select you will return to the main Automation Server screen but the selected server will not be active. Refer to the upper left hand corner of the Automation Server screen for a display of the currently active server id.

## Add
Clicking this button will take you to the Server Setup dialog box, where you can add a new server. You may add an unlimited number of servers.

## Edit
Highlight a server and click Edit to go to the Server Setup dialog box, where you can edit the details of the server.

## Delete

Clicking this button will delete the highlighted server from your system. A message will pop up asking you to confirm your decision to delete. Click Yes and the server will be deleted.

### Password

Clicking this button will open the Password Setup dialog box, where you can establish a password for your servers.

### Word Pro

Clicking this button will open the Edit Word Processors dialog box, where you show TeleMagic where it will find each of the word processors it will need to access when processing items.

### Downtime

Clicking this button will open the Set Server Active Time dialog box, where you can set the global times that the Automation Server will be off-line and on-line.

### Close

Clicking this button will return you to the main Automation Server screen.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

## The Server Setup Screen - General Settings Page

### Server ID
Each server must have a unique three character Server ID. Enter an alphanumeric identification code for the server in the Server ID field.

### Working Directory / Browse
Enter the name of the directory which should contain the server's temporary working files in the Working Directory field. We recommend that you enter a directory here that will be used solely for the purpose of storing the server's temporary working files, and that is located on a drive with plenty of disk space. Click the **Browse** button to search for a directory.

### Processing Pause Time
In the Processing Pause Time field, enter the number of seconds that should pass before the queue is refreshed and updated. Use the radio buttons to determine whether the server pauses between each item, or only when idle.

### Server Processes
Choose whether to use this queue to Merge and Transmit, Transmit only, or Merge only.

#### Note
This setting does not apply to Print Queues. Print Queues will print regardless of this setting. In other queues, this setting does not affect how wireless messages are handled. Wireless messages will be sent regardless of which of these radio buttons are selected. This setting will only affect how faxes and e-mail messages are handled.

### Retry Wait Time
In the Retry Wait Time field, enter the number of minutes (up to 900) the server should wait between each attempt to send the same item.

### Local Area Code
If your system administrator has not set up your local numbers using the North American Numbering Plan feature, enter your local area code in the Local Area Code field. Anytime the Automation Server encounters a number containing this area code, it will treat it like a local call.

### Dial Prefix (Outside Line)
In the Dial Prefix (Outside Line) field enter any number which must be dialed to access an outside line. This number will be used for both local and long distance calls.

### Prefix for Local Call
In the Prefix for Local Call field, enter any digits that need to be added in front of a number as required by your phone system or carrier.

### Modem Speaker On
Mark the Modem Speaker On check box if you want to hear the initialization and dialing sounds made by the faxmodem when items are being sent.

## Long Distance

In the Long distance field, enter any digits that need to be added in front of a fax number to place a long distance call.

## Dialer Suffix

In the Dialer Suffix field, enter any digits that need to be added at the end of a number such as an accounting code or other phone system requirement.

## Downtime

Clicking this button will open the Set Server Active Time dialog box, where you can set the times that this sever will be off-line.

### Note

If you set the global downtime, the downtime setting made for a particular server will override the global setting for that server only.

## Word Pro

Click this button to open the Word Processor Setup dialog box.

## Save

Clicking this button will save your settings and return to the Automation Server Setup screen.

## Cancel

Clicking this button will return you to the Automation Server Setup screen without saving your settings.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_Up_a_Server)<<1}

# Fax Specific Settings Page

### Number Of Retries

In the Number Of Retries field, enter the number of times (up to 9) the server should attempt to send a fax before declaring it failed.

### Local Fax ID

In the Local Fax ID field, enter a name which can be displayed by certain fax machines (for instance, those with an LCD), that will readily identify the origin of your faxes to others. This optional ID can be up to 20 characters in length and can contain spaces and special characters. (Remember that this ID will be applied to every fax processed by this server, so it should be something generic, such as your company name.)

### Fax Server Operators

In the Fax Server Operator field, enter the user ID of any users who will be responsible for maintaining the fax server. In the event of a critical error, the Fax Server Operators will be notified by E-Mail. Use the drop down list to select the users. (The entries in this field must be three-character user IDs separated by commas.)

### Fax Banner

Edit the fax banner in the fields of this section. You can literal content as well as merge fields.

> **Left Justified** contains the formatting for the part of the banner that will appear on the left side of the banner page.
>
> **Centered** contains the formatting for the part of the banner in the center of the banner page.
>
> **Right Justified** contains the formatting for the part of the banner that will appear on the right side of the banner page.

### Downtime

Clicking this button will open the Set Server Active Time dialog box, where you can set the times that this sever will be off-line.

#### Note

If you set the global downtime, the downtime setting made for a particular server will override the global setting for that server only.

### Word Pro

Click this button to open the Word Processor Setup dialog box.

### Save

Clicking this button will save your settings and return to the Automation Server Setup screen.

### Cancel

Clicking this button will return you to the Automation Server Setup screen without saving your settings.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_Up_a_Server)<<1}

# E-mail Specific Settings

### Server Processes

Select the radio button to determine the e-mail traffic being handled by this server. You can select None, Send Only, Receive Only, or Both.

### Retrieve Mail Every

Enter the time, in minutes, that the server will wait between retrieving new mail. This option is only available if you have selected to use this server to retrieve mail.

### Retrieve the following types of e-mail

Select the radio button to determine what type of e-mail this server will retrieve. You can choose to retrieve User Only, DSS Only, or All.

### Downtime

Clicking this button will open the Set Server Active Time dialog box, where you can set the times that this sever will be off-line.

#### Note

If you set the global downtime, the downtime setting made for a particular server will override the global setting for that server only.

### Word Pro

Click this button to open the Word Processor Setup dialog box.

### Save

Clicking this button will save your settings and return to the Automation Server Setup screen.

### Cancel

Clicking this button will return you to the Automation Server Setup screen without saving your settings.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_Up_a_Server)<<1}

## The Password Setup Dialog Box

### Master Password

Click Master Password if you would like to establish a password which will allow users to access all areas of the Automation Server.

### Options Password

Click Options Password if you would like to establish a password which will prompt users for a password each time they try to access another area of the Automation Server.

### Exit

Click Exit to close the Password Setup dialog box without establishing a password.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_The_TeleMagic_Enterprise_Automation_
Server_Password)<<1}

# The Word Processor Setup Dialog Box

## Word Processor

Mark each word processor that will be used by the Automation Server. Selected word processors must be available to the Automation Server.

## Command Line

Enter the path and executable file name of the currently selected word processor in the Command Line field. Keep in mind network security issues when entering this path as it will be used by every server on every workstation processing items.

## Ellipsis Button (Browse)

If you do not know the path and executable file name of the currently selected word processor, click the Ellipsis button to select it from a Windows Open dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Establishing_Your_Word_Processors)<<1}

# The Set Server Active Time Dialog Box

**Note**
If you set this global downtime, the downtime setting made for a particular server will override the global setting for that server only.

## Offline at
Enter the time when the server should go off-line for maintenance using the 24 hour clock.

## Online at
Enter the time when the server should come back on-line using the 24 hour clock.

## Enforce Downtime On
Mark the days when the established downtime will be respected.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Establishing_Server_Downtime)<<1}

# The Modem Configuration Dialog Box - Fax Page

### Tabs
Click the tabs to open the pages corresponding to the type of messaging you will be configuring.

### Device(s) Configured
This field contains a list of all modems configured for this server.

### Auto Configure
Select the Auto Configure button if you would like to have TeleMagic configure your faxmodem automatically. There will be a pause (automatic configuration can take up to five minutes to perform) while TeleMagic checks your system for faxmodems. When completed, it will return a Fax Devices Detected dialog box listing the faxmodems it found.

### Manually Configure
Click this button to open the Configure Faxmodem dialog box to configure the faxmodem at a specified port.

### Delete Modem
Click this button to remove the selected modem from the Device(s) Configured list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Configuring_Modems)<<1}

# Wireless Messaging Page

## Device(s) Configured

This field contains a list of all modems configured for this server.

## Use/Wireless Messaging Device Name

Mark the checkbox in the Use column corresponding to the modem to be used for wireless messaging.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Configuring_Modems)<<1}

# E-mail Page

## Connect Using

The options in this section will determine how the Automation Server connects to the Internet.

### Dial Up Networking

Select this option if the server will be connecting directly to the Internet using a local connection. If you choose this option, you must provide the following information:

**Connection Name -** The identity of this connection to the Internet.
**User Name -** Your Identification on your Internet Service.
**Password -** The password used to gain access to your Internet Service.
**Verify Password** - Same as Password.
**Stay Idle** - The amount of time, in minutes, that the Automation Server should stay online without activity before disconnecting.

### Connect through Local Area Network (LAN)

Select this option if you will be connecting to the Internet via your network.

## SMTP Server

Enter the SMTP name used by your Internet Service.

## Port

This is the SMTP port for your e-mail connection. Do not change this setting unless you know exactly what it is supposed to be.

## Default E-mail Address

Enter the e-mail address to be used when none is otherwise stated.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Configuring_Modems)<<1}

## DSS E-Mail Page

### POP3 Server
Your POP3 (receive) host name.

### Port
The port used by your POP3 host.

### User ID
Enter the user ID that will be used to access the e-mail server.

### Password
Enter the password used to gain access to the e-mail server.

### Verify Password
Re-enter the password.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Configuring_Modems)<<1}

# The Choose Rebuild Options Dialog Box

### Queue
This column will list all ten queues. The radio buttons for queues which you have not named will be unavailable.

### Ignore
Select this radio button for any queues you do not want to rebuild.

### Rebuild
Select this radio button if you want to rebuild a queue, but do not want to remove sent faxes from the queue.

### Archive
Select this radio button if you want to rebuild a queue and remove any sent faxes to an archive file. Archived faxes are stored in files named TMFAXARC.* in the TMFAX directory.

### Clear
Select this radio button to remove all items from the queue.

### Overwrite Archive File?
If you have selected the `Archive` radio button for any queues the Overwrite Archive File? check box will become available. Mark this box if you would like archived faxes to replace any faxes currently in the TMFAXARC.* files. Leave this box unmarked if you would like archived faxes to be appended to the end of the existing TMFAXARC.* files.

### Purge Processed External Docs?
External documents associated with faxes are stored in files that are referenced at the time the fax is sent. After a fax has been deleted or archived, you should purge these files to optimize your system.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_To_Rebuild_the_Automation_Server_Internally)<<
1}

# The User Security Dialog Box

## User Name

The User Name field will default to the user currently logged into TeleMagic. Select the user whose security you want to set from the User Name drop down list. The users shown here will only be those users who have accessed the current TeleMagic database at least once.

### Note

If you select a TeleMagic supervisor user, these fields will dim and you will not be able to edit the settings. By default, supervisors have full access to all areas of TeleMagic.

## Create/Link to Accounts

Mark the Create/Link to Accounts check box if you would like the selected user to be able to access the Create Record Link dialog box where he or she can add accounts to the accounting application from TeleMagic and link TeleMagic records to existing accounts. Unmark this check box if you do not want to allow the user to access the Create Record Link dialog box.

## View Accounting Fields

Mark the View Accounting Fields check box if you want to allow the user to access accounting data from within TeleMagic. Unmark this check box if you want to restrict the user's access to accounting information from within TeleMagic.

## Apply to all non-supervisory users for this database

If all or most users in this system will be using these settings, mark Apply to all non-supervisory users for this database. If marked, as soon as you click OK, TeleMagic will change the security for all non-supervisor users to match these settings. (Supervisors have full access and cannot be edited.)

If you have individually set the security for any users, those settings will be overwritten with the security established for this user. If you want to individually set different security for any users, do so after creating this default. If you want to apply these settings to this user only, unmark this check box.

## Accounting Application Login Information

The Login Information section will reflect the name of the accounting application you are currently using. Use the Login Information section to enter the information used in the login process for the accounting application. When you select any link option that launches your accounting application, TeleMagic will log the user in automatically.

`User Name:` Enter the name of the user as it is recognized in the accounting application.

`Password:` Enter the password the user needs to use when opening the accounting application.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½LINKS2_Establishing_User_Security)<<1}

# The Create / Remove record link for (linked contact record) Dialog Box

**Note**
If you are creating a link, all of these fields and buttons will be available. If you are removing a link, none of the fields and only the **Remove Link** and **Save** buttons will be available.

## Type of Link (New Account / Existing Account)

Choose New Account to create a new record or Existing Account to link to an existing record in the accounting application.

## Ledger (Customer / Vendor)

Choose Customer to add a customer record or Vendor to add a vendor record.

## Account Code

Enter a unique Account ID in the Code field if you are creating a new record.

If you want to link to an existing account, enter the record's Account ID in the Code field or click the **Find Record** button to locate the account. An Accounts Record List will open. Highlight the account you would like to use and click **Select**. The account's Account ID will be entered into the Code field, and its address information will be entered into the Company/Address field.

## Company/Address

The company information and address from the linked contact record will appear in this text box. If you are creating a new link, this text box will be empty.

## Find Record

This button is available when you have selected the `Existing Account` radio button under Type of Link. Clicking this button will open an Accounts Record List where you can highlight and select an accounting application contact record to which you will link the current TeleMagic contact record.

## Create Link / Remove Link

If you are linking to an existing account, you will receive a message asking if you would like to update TeleMagic with the current address information in the accounting application. If you select Yes, the records will be linked and TeleMagic will check to make sure that the address information in the accounting application matches that in TeleMagic. If it does not, the information in TeleMagic will be overwritten with the information from the accounting application. If you select No, the records will be linked, but no changes will be made to the record in TeleMagic.

If the **Create Link** button reads **Remove Link**, this record is already linked to an account in the accounting application. If a record was previously linked to an account, then unlinked, the original Account ID and address information will appear in the Code and Company/Address fields for reference and to facilitate re-linking to the same account. If you link to a different account, this information will be overwritten.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½LINKS2_Removing_and_Changing_Record_Links)<<1}

# The Accounts Transfer Dialog Box

## Please choose the records you want created and/or updated

Mark Customer account records if you would like to add customers. Unmark it if you do not want customer records added to TeleMagic.

Mark Vendor account records if you would like to add vendors. Unmark it if you do not want vendor records added to TeleMagic.

## Specify how you want these records created and/or updated

The Update address data for existing records option is only applicable to batch update and is unavailable at this time.

Mark Prompt before each update if you would like to be given the opportunity to select or reject individual records. If selected, you will be given a prompt for each record in the accounting application (based on your selections in step 12) and allowed to add them or reject them. If unmarked, all records matching your selections in step 12 will be added.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½LINKS2_Synchronizing_Data)<<1}

## The Customer Account Information Dialog Box

This dialog box shows the customer account information as recorded by the accounting application. The information shown will vary depending on the accounting application linked.

# The Inventory Look-up Dialog Box

### Stock Code
This is the company's internal stock number for the item.

### Stock Description
This describes the item stocked.

### Sales Price
This is the price that the item is sold for.

### Quantity in Stock
This is the total quantity of the item on hand.

### Allocated
This is the amount of the item already reserved for sales or other purposes.

### Available Stock
This is the amount of the inventory available after the allocation.

### Quantity on Order
This is the amount of the item that has been ordered but has not yet been received or released to the inventory.

### Company Name
Open this drop-down list box to choose the company you want to look up . Each company will probably have different inventory information.

### List Codes
Clicking this button will show the Product List. Highlight the product to be displayed and click **Select** to see the inventory levels of a particular product, or click **Cancel** to return to the Inventory Look-up dialog box.

### Clear
Clicking this button will clear the product currently being displayed.

### Close
Clicking this button will return you to the Contact Manager.

# The Launch (accounting application name) Dialog Box

## Which Company?

Highlight the company to be launched and click **OK**. The accounting application will be loaded and started.

# The Page Properties Dialog Box

### View
In the View field, enter or change the name of the current view.

### Page
In the Page field, enter or change the name of the current page.

### Change Font
Click this button to open the Font dialog box. The currently selected font, size, and typeface is indicated to the right of the button.

### Wallpaper Bitmap File
Enter the path and file name to the wallpaper file you would like to use as a background for the screen. Click **Find** to open a browse window to locate the file.

### Pen Color
Select a default color for the default font and the outside edge of objects.

### Fill Color
Select a default color for the inside of objects.

### Size (Preset / Height / Width)
In the Preset field, open the drop-down list box to select the default screen size of the view.

In the Height field, use the default height as calculated from the default screen size in Preset or manually enter a number of rows.

In the Width field, use the default width as calculated from the default screen size in Preset or manually enter a number of columns.

### Grid (Use Font Dimensions / Vertical Pixels / Horizontal Pixels)
The Use Font Dimensions check box is marked by default. If the Use Font Dimensions check box is unmarked, the Vertical Pixels field and the Horizontal Pixels field become available.

If the Vertical Pixels field is active, use the spinner arrows to set a size for the height of the Grid.

If the Horizontal Pixels field is active, use the spinner arrows to set a size for the width of the Grid.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Setting_Page_Properties)<<1}

# The Input Order Dialog Box

## Field Box and Mover Arrows

The fields placed on the current Page will be listed in this text box in the current input order. If you want to change the input order, click and highlight the field to be moved. The mover box to the left of the field name will activate. Drag the field to the desired spot in the input order and release it.

## By Row

If you have your fields lined up in rows, click this button to have the input order automatically set based on their position in the row.

## By Column

If you have your fields lined up in columns, click this button to have the input order automatically set based on their position in the column.

## Show Input Order on objects in Screen Designer

Mark this check box to have the input order number appear on the field objects on the page. Marking this check box will put a check next to the Show Input Order menu item.

## OK

Clicking this button will accept your selections and return you to the Screen Designer main screen.

## Cancel

Clicking this button will return you to the Screen Designer main screen without accepting your selections.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Edit_Input_Order)<<1}

# The Grid Size Dialog Box

## Vertical Pixels

If the Vertical Pixels field is active, use the spinner arrows to set a size for the height of the Grid.

## Horizontal Pixels

If the Horizontal Pixels field is active, use the spinner arrows to set a size for the width of the Grid.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Gridlines)<<1}

# Prompt Properties Dialog Box

### Text
Enter the text for the prompt in this field.

### Transparency
Select the transparency mode for the prompt field from the drop-down list. You can select Transparent or Opaque.

### Change Font
Click this button to open the Font dialog box. The selected font and style is indicated beneath this button.

### Alignment
Select the alignment for the font from this drop-down list. This refers to the alignment of the text within the field, not on the screen.

### Pen Color
Click the **Color** button in this section to open a palette from which to select the pen color. The selected color is indicated to the left of the button.

### Fill Color
Click the **Color** button in this section to open a palette from which to select the fill color. The selected color is indicated to the left of the button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SCREENS_Prompt_Properties)<<1}

# The Rectangle Properties Dialog Box

## Border
Use the controls in this section to determine the general appearance of the rectangle.

### Type
Select the border type from the drop-down list. Your choices are Normal, 3D Inset, 3D Outset, and 3D Groove.

### Size
In the Size field, open the drop-down list box to select the thickness of the outside edge of the object from 1 to 6 points.

### Roundness
In the Roundness field, open the drop-down list box to determine how round the edges of the rectangle should be. The scale is from 0 (rectangular) to 99 (completely round).

## Transparency
In the Mode field, open the drop-down list box to select either Opaque or Transparent.

## Pen Color
Click the **Color** button in this area to select a pen color. The pen color for a rectangle determines the outline color for Normal rectangles, and the shadow color for Inset and Outset rectangles. Pen color cannot be set for 3D Groove rectangles. The selected color is indicated to the left of the button.

## Fill Color
Click the **Color** button in this area to select a fill color. This option is only available if Transparency mode is set to Opaque. The selected color is indicated to the left of the button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Rectangle_Circle_Tool)<<1}

# The Select Picture Dialog Box

## File (Name)
Enter the name and path of the graphic file to be added to the page or click **Find** to search for the file.

## Preview
A thumbnail image of the graphic file shown in the Name field will appear in this box.

## Picture (Alignment)
In the Alignment field, open the drop-down list box to select Scale, Stretch, Crop or Center.

Scale means that the graphic will be placed in the object and it will be reduced or enlarged proportionally on all sides as needed to fit in the object. Since this option will keep the graphic proportional, there may be space left over inside the object which is not covered by the image.

Stretch means that the graphic will be placed in the object and it will be reduced or enlarged on all sides as needed to fit in the object exactly. Since this option is not proportional the object may become distorted.

Crop means that the graphic will be placed in the object and, if it is bigger than the object, the graphic's right side and bottom will be cut off as needed to make the graphic fit.

Center means that the graphic will be placed in the center of the object. The object may have extra space on its sides if it is smaller than the object it is being placed into.

## Transparency (Mode)
In the Mode field, open the drop-down list box to select either Opaque or Transparent.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Picture_Tool)<<1}

# The Select Field Dialog Box

## Fields For

Select the database level radio button to see the fields for that level. You can select to work with the current level of the database for which the view has been set up, or the parent levels of the current level.

## Field List

This is the list of fields found in the database level corresponding to the `Fields For` radio button you have selected.

## Display Prompt with Field

Mark this check box to have the prompt associated with this field placed on the page with the field. The prompt will be placed to the left of the field. Click and drag the prompt to any other place on the page that you desire.

## Edit Field List

Clicking this button will open the Edit the Field List dialog box. This allows you to add new fields or edit the existing fields in this database.

## Select

Clicking this button will accept your selections and return you to the Screen Designer main screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Field_Tool)<<1}

# The Activity Dates Dialog Box

## Display the (activity choice)…

Open the drop-down list box to select the activity to be displayed in this field. Your choices are First Completed, Last Completed, Next Incomplete.

## activity that is a (activity type) or…

Enter an activity type in this field to select a specific type of activity to be displayed. To see the list box of choices, click in the field and then right-click. The Type list box will open. (You cannot open this list box by pressing F2.)

## Any activity type for the contact

Mark this check box to have this field display activities of any type.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Activity_Fields_Tool)<<1}

# The Copy View or Page Dialog Box

## Copy

Select the appropriate radio button that describes the type of copy you want to create. Your choices are:

> `Current page to a new page in an existing view` - select this radio button to create a new page from the current page, where the new page will be a part of the current view. Selecting this radio button will activate the New page name field and the Existing view name drop down list.
>
> `Current page to a new page in a new view` - select this radio button to create a new page from the current page, where the new page will be part of a new view. Selecting this radio button will activate the New view name field and the New page name field.
>
> `All pages in current view to a new view` - select this radio button to copy the entire view. Selecting this radio button will activate the New view name field only.

## New view name

Enter the name of the new view in this field. This field is only available if you are copying the page to a new view.

## New page name

Enter the name of the new page in this field. This is not available if you are copying all pages in the current view to a new view.

## Existing view name

Open the drop-down list to select the name of the existing view to which you would like to copy the new page. This is not available if you are copying the page to a new view.

## Go to new view or page after copying

Mark this check box to move immediately to the new view or page that was created as soon as the creation process has ended.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_To_Copy_a_View_or_Page)<<1}

# The Delete View or Page Dialog Box

### Delete View
Clicking this button will delete the current view. A confirmation box will appear to verify that this is what you really want to do.

### Delete Page
Clicking this button will delete the current page. A confirmation box will appear to verify that this is what you really want to do.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Removing_Pages_and_Views_from_Your_Data
base)<<1}

# The Page Order Dialog Box

## Page List

This box shows the list of pages in the current view and their order. To change a page's order, use the mover buttons to click and drag the page to the place in the order you desire.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Arranging_Pages_in_Your_View)<<1}

# The Text Properties Dialog Box

## Text Box
The text is displayed in this box. You can make any changes to the text desired by adding or editing the text in this box.

## Transparency (Mode)
In the Mode field, open the drop-down list box to select either Opaque or Transparent.

## Font (Font / Style / Align / Size)
In the Font field, open the drop-down list box to select a font.

In the Style field, open the drop-down list box to select the style for the font. Your choices are Normal, Bold, Italic, and Bold Italic.

In the Align field, open the drop-down list box to select the alignment for the text. Your choices are Left, Center, and Right.

In the Size field, open the drop-down list box to select the size of the font.

## Pen Color
Select a color for the font.

## Fill Color
Select a color for the inside of the text object.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Text_Properties)<<1}

# The Field Properties Dialog Box

## Field Description
The field name and prompt are displayed in this box.

## Font
Use the controls in this area to establish the font properties for this field. The current font properties are indicated in the lower portion of this area.

### Change Font
Click this button to open the Font dialog box.

### Alignment
In the Alignment field, open the drop-down list box to select the alignment for the text. Your choices are Left, Center, and Right.

## Icon (Display Icon)
If the field you are working with is a date field, this check box will activate. Mark this check box to have the Date Picker icon displayed with the field on the page.

## Transparency (Mode)
In the Mode field, open the drop-down list box to select either Opaque or Transparent.

## Pen Color
Click the **Color** button in this area to open a palette and select the color for any text in this field. The color currently selected is indicated to the left of the button.

## Fill Color
Click the **Color** button in this area to open a palette and select a color for the background color of this field. This color will only be apparent if the Transparency mode is set to Opaque.

## Field Style
Select the style for the field by selecting the appropriate radio button, either `Plain` or `3D`.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Field_Properties)<<1}

# The OLE Properties Dialog Box

## Picture (Alignment)

In the Alignment field, open the drop-down list box to select Scale, Stretch, Crop or Center.

> Scale means that the graphic will be placed in the object and it will be reduced or enlarged proportionally on all sides as needed to fit in the object. Since this option will keep the graphic proportional, there may be space left over inside the object which is not covered by the image.
>
> Stretch means that the graphic will be placed in the object and it will be reduced or enlarged on all sides as needed to fit in the object exactly. Since this option is not proportional the object may become distorted.
>
> Crop means that the graphic will be placed in the object and, if it is bigger than the object, the graphic's right side and bottom will be cut off as needed to make the graphic fit.
>
> Center means that the graphic will be placed in the center of the object. The object may have extra space on its sides if it is smaller than the object it is being placed into.

## Transparency

Select the Transparency mode from the `Mode` drop-down list, either Transparent or Opaque.

## Field Style

Choose the general appearance for the field by selecting the appropriate radio button, either `Plain` or `3D`.

## Fill Color

Click the **Color** button in this area to open a palette and select the fill color for this field.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_OLE_Field_Properties)<<1}

# The List Properties Dialog Box

## Display

The current expression for this list is shown in the Display box. Clicking the **Expression** button will open the Build List Expression dialog box, allowing you to modify the expression.

## Filter

If there is a filter associated with this list, the Filter check box will be marked and the filter expression is shown in the Filter box. Clicking the **Expression** button will open the Build Filter Expression dialog box, allowing you to modify the expression.

## Security

Rollup lists will bypass the standard TeleMagic record level security. If there are sensitive records in your database, you can use this option to set security for the rollup list to limit non-supervisor access. Mark the `Security` check box to open the Expression Builder to add a security filter, or click the **Expression** button to edit an existing security filter.

## Sort

If there is a sort order associated with this list, the drop-down list on the left side will show what the sort is based on. Your choices are: none, List, or Expr. (Expression). The drop-down list on the right side will show whether the sort is in ascending or descending order. If the sort is based on an expression, its expression is shown in the Sort box. Clicking the **Expression** button will open the Build Sort Expression dialog box, allowing you to modify the expression.

## Change Font

Click this button to open the Font dialog box. The currently selected font is indicated below this button.

## Pen Color

Click the **Color** button in this area to open a palette and select a color for any text in this field. The current pen color is indicated to the left of the button.

## Fill Color

Click the **Color** button in this area to open a palette and select a background color for this field. The current fill color is indicated to the left of the button.

## Field Style

Choose a style to set the general appearance for the field, either `Plain` or `3D`.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Rollup_List_Properties)<<1}

# The Multiple Object Properties Dialog Box

## Font
Use the controls in this area to set the appearance of the font for the selected objects.

### Change Font
Click this button to open the Font dialog box.

### Alignment
In the Align field, open the drop-down list box to select the alignment for the text. Your choices are Left, Center, and Right.

## Pen
Use the controls in this area to set the general appearance of the selected objects.

### Type
In the Type field, open the drop-down list box to select the style for the objects. Your choices are Normal, 3D Inset, 3D Outset, and 3D Groove.

### Size
In the Size field, open the drop-down list box to select the thickness of the outside edge of the object. You can select from 1 to 6 points.

### Roundness
In the Roundness field, open the drop-down list box to determine how round the edges of a rectangle should be. The scale is from 0 (rectangular) to 99 (completely round).

## Transparency (Mode)
In the Mode field, open the drop-down list box to select either Opaque or Transparent.

## Picture & OLE (Alignment)
In the Alignment field, open the drop-down list box to select Scale, Stretch, Crop or Center.

Scale means that the graphic will be placed in the object and it will be reduced or enlarged proportionally on all sides as needed to fit in the object. Since this option will keep the graphic proportional, there may be space left over inside the object which is not covered by the image.

Stretch means that the graphic will be placed in the object and it will be reduced or enlarged on all sides as needed to fit in the object exactly. Since this option is not proportional the object may become distorted.

Crop means that the graphic will be placed in the object and, if it is bigger than the object, the graphic’s right side and bottom will be cut off as needed to make the graphic fit.

Center means that the graphic will be placed in the center of the object. The object may have extra space on its sides if it is smaller than the object it is being placed into.

## Pen Color

Click the **Color** button in this area to open a palette and choose a pen color for the selected objects. The selected color is indicated to the left of the button.

## Fill Color

Click the **Color** button in this area to open a palette and choose a fill color for the selected objects. The selected color is indicated to the left of the button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Setting_Multiple_Object_Properties)<<1}

# The Windows WordPad Available Merge Fields Dialog Box

## Field List

In addition to the standard merge fields which pull Contact Manager information, the WordPad Available Merge Fields list box will contain the following directives:

Date inserts the system date when the document is merged.

Time inserts the system time when the document is merged.

Standard Address inserts the standard address if one has been established in Database Preferences, or the address Key Fields if no standard address has been set up. (See Database Preferences: Standard Address for details.)

Fecha inserts the date in Spanish format (DD MONTH (en Espanol) YYYY).

The five fax directives (Fax From, Fax Notes, Fax Number, Fax Subject, Fax To) are used in creating documents for faxing.

Scroll down the list of merge fields. They will appear in alphabetical order grouped by level. If you would like to go to a specific field, type the first letter of the field prompt. You will go to the next field beginning with that letter.

### Note

If you have upgraded to V4 from a prior version of TeleMagic and the Field After Level radio button is selected in Writing Preferences, the level will appear before the field name. V4 does not support this format, so the merge fields that follow it must be changed before they can be used.

Select a merge field from the Available Merge Fields list box by highlighting it and clicking the Select button, or by using the ARROW keys to highlight your choice and pressing ENTER. Once you select a field, you will be taken back to your Write/WordPad document.

## Select

Clicking this button will return you to the WordPad main screen, and place your field selection in the document.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WORD1_Creating_Editing_Memos_Documents_and_Form_Letters_Using_the_Write_WordPad_Interface)<<1}

# The Return Address Dialog Box

The Return Address dialog box will offer as a default whatever address was entered the last time it was accessed.

## Lines 1-5

Enter your return address in Lines 1 through 5 exactly as you want it to print.

**Note**

If you should decide you do not want to include a return address, simply deselect the Return Address check box. If you want to edit the entry, deselect this check box, then select it again and the Return Address dialog box will re-appear. Edit your entry and click OK.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Printing_Envelopes)<<1}

# The North American Numbering Plan Setup Selection Box

### Close
Click Close to close the North American Numbering Plan Setup Selection Box.

### Add
Click Add to open the Add NANP Record dialog box where you can set up your numbers.

### Change
Click Change to open the Change NANP Record dialog box and modify the currently highlighted entry.

### Delete
Click Delete to remove the currently highlighted entry from the list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½DIALER_North_American_Numbering_Plan)<<1}

# The Add NANP Record Dialog Box

## Area Code

Enter the area code of the number you are setting up. If the settings apply to all numbers in this area code, you do not need to enter an exchange.

## Exchange

Enter the exchange of the number you are setting up. (The exchange is the first three numbers following the area code.)

## Through

If there are several exchanges in an area code that require the same dialing pattern, enter the first number in the range in the Exchange field, and the last number in the range in the Through field. (Click here for information on creating sub-sets of ranges.)

## Dialer Formatting Prefix Radio Buttons

The Dialer Formatting radio buttons allow you to control whether or not TeleMagic Enterprise references your Prefix for Local Call or your Prefix for Long Distance Call fields established in Dialer preferences when dialing this number:

> The `Use No Prefix` radio button will cause the number to be dialed without either the Local or Long Distance prefix established in Dialer Preferences. (This setting only applies to the Local and Long Distance prefixes. It has no effect on the Dialer Prefix established in Dialer Preferences.)
>
> The `Use Local Prefix` radio button will cause the number to be preceded by the Prefix for Local Call established in Dialer Preferences.
>
> The `Use LD Prefix` radio button will cause the number to be preceded by the Prefix for Long Distance Call established in Dialer Preferences.

## Use Area Code

Mark the Use Area Code check box if you would like the area code dialed with this number.

## Use Dialer Prefix

Mark the Use Dialer Prefix check box if you would like the Dialer Prefix established in Dialer Preferences dialed with this number. (This setting has no effect on whether or not TeleMagic Enterprise dials the Local or Long Distance Prefix. See Dialer Formatting Prefix Radio Buttons above for more information.)

## Use Dialer Suffix

Mark the Use Dialer Suffix check box if you would like the Dialer Suffix established in Dialer Preferences dialed with this number.

### Note

The Use Dialer Prefix and Use Dialer Suffix options are not directly related to the NANP. These options are being provided here to allow you the flexibility to create exceptions to your Preference settings if the need should arise.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½DIALER_Using_NANP)<<1}

# The Change NANP Record Dialog Box

## Area Code

Enter the area code of the number you are setting up. If the settings apply to all numbers in this area code, you do not need to enter an exchange.

## Exchange

Enter the exchange of the number you are setting up. (The exchange is the first three numbers following the area code.)

## Through

If there are several exchanges in an area code that require the same dialing pattern, enter the first number in the range in the Exchange field, and the last number in the range in the Through field. (Click here for information on creating sub-sets of ranges.)

## Dialer Formatting Prefix Radio Buttons

The Dialer Formatting radio buttons allow you to control whether or not TeleMagic Enterprise references your Prefix for Local Call or your Prefix for Long Distance Call fields established in Dialer preferences when dialing this number:

> The `Use No Prefix` radio button will cause the number to be dialed without either the Local or Long Distance prefix established in Dialer Preferences. (This setting only applies to the Local and Long Distance prefixes. It has no effect on the Dialer Prefix established in Dialer Preferences.)
>
> The `Use Local Prefix` radio button will cause the number to be preceded by the Prefix for Local Call established in Dialer Preferences.
>
> The `Use LD Prefix` radio button will cause the number to be preceded by the Prefix for Long Distance Call established in Dialer Preferences.

## Use Area Code

Mark the Use Area Code check box if you would like the area code dialed with this number.

## Use Dialer Prefix

Mark the Use Dialer Prefix check box if you would like the Dialer Prefix established in Dialer Preferences dialed with this number. (This setting has no effect on whether or not TeleMagic Enterprise dials the Local or Long Distance Prefix. See Dialer Formatting Prefix Radio Buttons above for more information.)

## Use Dialer Suffix

Mark the Use Dialer Suffix check box if you would like the Dialer Suffix established in Dialer Preferences dialed with this number.

### Note

The Use Dialer Prefix and Use Dialer Suffix options are not directly related to the NANP. These options are being provided here to allow you the flexibility to create exceptions to your Preference settings if the need should arise.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½DIALER_To_Edit_NANP_Settings)<<1}

# The Master Password Dialog Box

Once a master password is entered, there are no further security restrictions to the Automation Server. Users will be able to access all areas of the Automation Server without being prompted to enter the password again. Before using the Master Password, bear in mind that users will be able to access Maintenance mode, where they can edit and view full details (including comments) of all items, including those sent by other users. Where security is not an issue, this password is convenient because users will not be continuously prompted for a password.

### Enter New Password

Enter the Master Password in this field. (Make sure it is different from the Options Password if you have established one.)

### Confirm New Password

Re-type the Master Password in this field to confirm your entry. If the confirmation is different from the original password, you will receive an error message.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_The_TeleMagic_Enterprise_Automation_Server_Password)<<1}

# The Options Password Dialog Box

Once an Options Password is entered, users will be prompted to enter the password whenever they try to access another area of the Automation Server. This will restrict users who have not been given the Options Password from being able to change server settings, or enter maintenance mode and change or view details of other users' items. Use this password in situations where security is a consideration.

## Enter New Password

Enter the Options Password in this field. (Make sure it is different from the Master Password if you have established one.)

## Confirm New Password

Re-type the Options Password in this field to confirm your entry. If the confirmation is different from the original password, you will receive an error message.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Setting_The_TeleMagic_Enterprise_Automation_Server_Password)<<1}

# The Branch Scripts Report Dialog Box

The Branch Scripts Report dialog box allows you to create a hard copy of your scripts.

## Current Script

Select the `Current Script` radio button if you would like a printout of the current script only.

## All Scripts

Select the **All Scripts** button if you would like a printout of all of your scripts.

## Include Text

Leave the Include check box marked if you would like to include the script text in the printout.

Unmark the Include Text check box if you would like to print an outline of the branch names only.

## View

Clicking this button will open a preview of the report.

## Print

Clicking this button will open the Windows Print dialog box. Adjust your printer settings if necessary and click **OK** to send the report to the printer.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT2_To_Print_a_Script)<<1}

# The Select Sales Representative Dialog Box

## Sales Representative List

The Select Sales Representative dialog box allows you to assign a sales forecast to a sales representative. Generally, you will be entering your own sales forecasts, but it is possible that a user may be inputting data for another sales person, or a sale could be handled by a representative other that the one who made the initial contact.

#### Note

If you assign a sales forecast to another user and you are not a supervisor user, you will not be able to access the forecast once it is saved.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

# The Dialer Dialog Box

## Phone List

This is the list of all available phone numbers for this contact record.

## Dial

Click this button after you have selected the phone number you want to call.

## Close

Click this button to return to the Contact Manager without making a call.

## Answer Phone

Click this button if you have an incoming call for which you want to record call notes. It does not matter who the current contact is, if necessary, you can switch to the correct contact before saving the call notes.

When you click this button, the Call Notes dialog box will open. TeleMagic will partially fill in the Description as Call from. The Status will default to Completed.

## Manual Dial

Click this button to access the Manual Dialer.

## Initialize Modem

When you dial a number in TeleMagic, your modem is automatically initialized. However, some modems cannot handle too much information at once, and they fail to initialize when a number is dialed.

In such cases, initializing the modem before dialing the number may help solve the problem. Click this button to start your modem without actually dialing.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# The Manual Dial Dialog Box

This dialog box should be used as if it were a touch tone phone. Click the buttons you would normally press on your phone and click **Dial** when ready.

## Numeric Keypad

Use these buttons to input the number you want to dial.

## * and #

The asterisk and the pound sign function like those on your telephone keypad.

## Comma

Add a comma to the number you are dialing if you need to have the dialer pause before continuing. Each comma produces a two-second pause.

## Back

Press this to erase the digit you have just entered.

## Dial

Click this button after you have entered the number and you want to start the dialing process.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½DIALER_Making_Calls_Using_the_Manual_Dial_Feature)<<
1}

# The Login Dialog Box

### User ID
Type your three-character User ID.

### Password
Type in your password. If you have not been assigned a password, press ENTER. If your password does not seem to work, check with your system administrator. If you have a long password, enter it even if it seems longer than the Password box allows. If your password is appearing in a regular, readable typeface, TeleMagic may be having problems locating a Password font. Make sure that the Windows-standard font named Password is installed on your system, and make sure that the Windows \SYSTEM sub-directory exists on your local drive.

### Hint
If you want to avoid having to fill in this dialog box every time you open the program, you can use command line parameters to bypass the Login dialog box. See the topic Command Line Parameters for more information.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MASTER_Starting_The_Program_and_Logging_In)<<1}

# The First Time Login Dialog Box

This dialog box will only appear the first time this installation of TeleMagic is opened. After that, the Login dialog box will be used.

## Enter your 3 character ID

Type a three-character User ID.

#### Hint

The User ID is usually your initials, but you can use any 3 alphanumeric characters.

## Enter your name

Type your name.

## Enter a Password (if desired)

Type a password if you want to secure your accessibility. If your password is appearing in a regular, readable typeface, TeleMagic may be having problems locating a Password font. Make sure that the Windows-standard font named Password is installed on your system, and make sure that the Windows SYSTEM sub-directory exists on your local drive.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MASTER_Starting_The_Program_and_Logging_In)<<1}

# The Select Database Selection Box

## List of Databases

In the Select Database selection box, you will see a list of the databases available to you. If you want to associate your scheduling, word processing, and other functions to specific contacts, you *must* select a database. Use the UP/DOWN ARROWS or the scroll bar to browse all available databases.

## Open

Click this button to open the database you have highlighted.

## No Database

Click this button if you do not want to open a database.

## Add

Click this button to open the Add a Database dialog box, allowing you to add a new database to the Select Database selection box.

## Change

Click this button to open the Change the Database Name dialog box, allowing you to change the name of the database you have selected.

## Delete

Click this button to delete a database. Click Yes at the first confirmation message. You will receive a warning informing you that deleting a database is permanent and asking if you would like to abort. Click No and the database will be deleted.

## Copy

Click this button to create another database by copying the one you have selected. The Copy a Database dialog box will open.

## Usage

Click this button to open the Database Description dialog box and enter a description of the database.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE_Database_List_Maintenance)<<1}

# The Copy A Database Dialog Box

## New Name

Enter a description for the new database.

## Directory

Enter the sub-directory in which your database will reside. The database must be in its own directory, preferably under the TeleMagic directory tree. If you click **Directory**, you will bring up the Select Directory dialog box. Select the directory from this dialog box.

### WARNING!

Do not copy a database to a floppy disk. Databases too large to fit on a floppy and it can cause problems later. For example, when you rebuild, TeleMagic will always expect to find a database in the floppy drive to which the database was originally copied. If you want to copy a database onto a floppy in order to move it to another installation, use the Template Maker instead. First create a template of the database on the hard drive, and then manually copy the template files to a floppy disk.

## Copy Contact Data

Mark the Copy Contact Data check box to copy the data in the source database into the new database.

## Copy Security Settings

Mark the Copy Security Settings check box to copy the database security settings from the source database to the new database.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE_Copying_Existing_Databases)<<1}

# The Change The Database Name Dialog Box

In this dialog box you can change the name (description) of a database.

### Name
This shows the old name of the database.

### Path
This field shows the path to the directory where the database is located.

### To
Enter the new database name.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE_To_Change_the_Name_of_a_Database)<<1}

# The Change Password Dialog Box For Non-Supervisor Users

This dialog box allows you to add or change your current password. This is the dialog box used for users who are not members of the Supervisor security group. Supervisor users have a slightly different dialog box.

## Enter Current Password

Enter your current password.

## Enter New Password

Enter the new password.

## Verify New Password

Enter the new password a second time. This allows you to verify that you entered your new password correctly the first time.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_Changing_Passwords)<<1}

# The Level to Browse Dialog Box

This allows you to choose which of the available levels you would like to browse.

## Database Levels

Click one of the buttons to go to that level.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT1_To_Access_Browse_View_Method_2)<<1}

# The Browse Filter and Index Selection Dialog Box

This allows you to choose which records you would like to browse, in what order.

## Filter

Open the drop-down list and select a filter.

**WARNING!**

If you have more than 30,000 records in your database, do not apply a filter before using browse view. If you do, you will encounter significant delays while TeleMagic applies the filter.

## Index

Open the drop-down list box and select an index.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT1_To_Access_Browse_View_Method_2)<<1}

# The Add Record Dialog Box

This dialog box allows you to add a record to your database.

## Add (level name) record

Click the button that corresponds to the database level where the new record will reside. The label on the button will indicate the name of the level.

> The top button will create a new record in Level 1 of your database.
>
> The second button will create a new record in Level 2 of your database.
>
> The third button will create a new record in Level 3 of your database.
>
> **Note**
> Any level that has not been defined in the database will not be available.

## Quick Add

Click this button to add a record to the current level.

To Add a Level 1 Record
Adding to Multiple Levels

# The Browse Edit Dialog Box

This dialog box allows you to edit the selected field.

### Field name

This is the name of the field you are editing.

### Field contents

This is the data currently in the field. Edit this data as necessary. The dialog box will be as long as the field length allows.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Editing_Records_in_Browse_View)<<1}

## Select a Level for Replace Dialog Box

This allows you to choose one of the available database levels for the group replace. Simply click one of the buttons to select that level.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Group_Replace)<<1}

# The Replace Expression Dialog Box

## Replace Value

In the text box, enter the text with which the data in the selected field is to be replaced.

### Note

If the field you are replacing is a check box field, you will see a check box instead of a text box. Either mark or unmark this check box.

### Note

If the field you are replacing is validated from list, its list box will pop up if what you type is invalid. The only exception to this is if you are emptying the contents of the field.

## Advanced

Click this button if you want to replace the data with the result of an expression. The expression builder will open.

### Note

This will not be available if the field you are replacing is a validated field.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Group_Replace)<<1}

# The List Box for (field name) Dialog Box

### Title of List box

Enter or change the name of the list box. This will appear in the title bar of the list box whenever it is opened.

### Validate field contents from list

Mark this check box to require field entries to match list box entries. Field Validation means asking TeleMagic to verify that data you enter into a field matches certain requirements.

### Multiple valid entries allowed

Mark this check box to allow more than one entry to be in the field at the same time. The entries will be separated with a comma.

### Automatically Launch list box

Mark this check box to always force the list box to appear as soon as the cursor is placed into this field.

### Modified by Supervisor Only

If this list box is for a field other than a contact field (for example, a field in the Sales Forecasting dialog box) this check box becomes available. Mark this check box if you do not want non-supervisor users to be able to change list box items or configuration.

### Show list in sorted order

Mark this check box to always have the data in the list box sorted alphabetically.

### Display description first

When you add a list box item, you can also add a description that will appear next to the item in the list box. (The description will not be entered into the field.) By default, the list box will display the items, then any description. This option allows you to display the list with the description first, followed by the item. If you are also sorting the list, the list box will still be arranged alphabetically by item rather than description.

### Use wide list display

It is possible to create list box items that are up to 252 characters long. If you have long items, use this option to widen your list box display to accommodate them.

### Replace the field / Append to the end / Insert at beginning

Select the appropriate radio button to tell TeleMagic how to place the list box item into the field:

> Replace the field will erase the existing data in the field and replace it with the new data from the list box.
>
> Append to the end will keep any data already existing in the field and add the new data from the list box to the end of the old data.
>
> Insert at beginning will keep any data already existing in the field and add the new data from the list box to the beginning of the old data.

## Use list from other field

If you want to use the same list in a list box assigned to another field, mark this check box. The drop-down list box will open and display all fields with a list box. Select the field with the list box you want to use.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Advanced_List_Box_Configuration_Options)<<
1}

# The (field name) List Dialog Box

### List Items
This field contains a the list of all items in the list box.

### Select
Click on this button to select an item from the list box.

### Add
Click this button to add a new item to the list box. The Add Item to List Dialog Box will open.

### Change
Click this button to change an item. The Change item in List dialog box will appear.

### Delete
Click this button to delete an item.

### Options
Click on this button to open the Listbox Options dialog box. Available options are: Export Listbox Items, Import Listbox Items, Delete All Listbox Items, and Print All Listbox Items.

### Config
Click this button to bring up the List Box dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1}

# The Add Items Dialog Box

## Item
Type what data should appear in the field when this item is selected.

## Description
Type more descriptive information about what you entered in the Item field. This will appear in the list box as an explanation of the item, but will not appear in the field.

## More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

# The Change Items Dialog Box

## Item
Type what data should appear in the field when this item is selected.

## Description
Type more descriptive information about what you entered in the Item field. This will appear in the list box as an explanation of the item, but will not appear in the field.

## More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Entering_and_Editing_Data)<<1} Entering and Editing Data

## The Listbox Options Dialog Box

### Export
Clicking this button opens a Save As dialog box, which allows you to create a file containing the data in this list box.

### Import
Clicking this button opens an Open dialog box, which allows you to select a file to import into this list box.

### Delete All
Clicking this button will remove the contents of this list box. A confirmation pop-up will appear to verify you want to delete everything. Click **Yes** to delete the contents of the list box, or click **No** to cancel the deletion.

### Print
Clicking this button will send the contents of this list box to the default printer. Click **OK** to print, or click **Cancel** to cancel the printing and return to the list box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_List_Box_Options)<<1}

# The Insert Object Dialog Box

## Create New / Create from File

Select the radio button that indicates whether you will be creating a new OLE object, or creating a new one from one of the supported applications.

## Object Type

If you chose to create a new object, this list will be present. The object types that your system can accommodate are listed here.

## File

If you chose to create the object from a file this field will be present. Enter the path and file name in this field, or click **Browse** to open the Browse dialog box and select the file.

## Link

If you chose to create the object from a file, you have the option of linking it to the source file. When this checkbox is marked, the object will be updated to reflect changes in the source file.

## Display as Icon

Mark this checkbox to display an icon for the application used to create the object or the source file for the object. The icon will appear in the OLE field. When the user clicks on the icon, the application will launch with the source file loaded or selected. What is displayed here may be affected by the source application.

## Icon

If you chose to display the object as an icon, the icon will be displayed.

## Change Icon

To select another icon, click this button. The Change Icon dialog box will open.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1}

# The Insert Object from File Dialog Box

### List Files of Type
Drop down this list to show the extension of the file you are looking for. If you do not know its extension, Mark the All Files check box.

### All Files
Mark this if you do not want to limit the search to files with a particular extension.

### Drive
Select the drive where the file's directory is located.

### Directory
Navigate to the source file's directory.

### File Name
Enter the name of the file that is the source of the object.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1}

# The Paste Special Dialog Box

### Source
This indicates the type of file you are about to paste.

### Paste
Click this to paste the object in the standard fashion (not linked.)

### Paste Link
Click this to paste the object, and keep its link to the source file.

### Display as Icon
Mark this checkbox to display an icon for the application used to create the object or the source file for the object. The icon will appear in the OLE field. When the user clicks on the icon, the application will launch with the source file loaded or selected.

### Icon
If you chose to display the object as an icon, the icon will be displayed.

### Change Icon
To select another icon, click this button. The Change Icon dialog box will open.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Entering_and_Editing_Pictures_Charts_Spreadsheets_Documents_Sounds_and_Other_OLE_Objects)<<1}

# Select a Level to Index Dialog Box

Click the button corresponding to the level on which the index is to be based.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Using_Indexes)<<1}

# The Indexes Selection Box

This lists all available indexes.

### Close
Click this button to close the Indexes selection box.

### Build Indexes
Click this button to run a rebuild on all indexes.

### Add
Click this button to open the Add Index dialog box, where you can add a new index.

### Change
Click this button to open the Change Index dialog box, where you can change the highlighted index.

### Delete
Click this button to delete the highlighted index.

### Copy
Click this button to open the Copy an Index dialog box where you can copy the highlighted index.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½CONTACT4_Indexing)<<1} Indexing

# The Filter Count Dialog Box

### Level Information

The analysis tells you how many records there *were* at each database level for the filter named in the title bar *the last time that the filter was analyzed*.

### Last Count

This field shows the date and time of that last analysis.

### Analyze

Click this button to update the analysis. The latest statistics will be displayed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Filter_Analysis_Counting_Records_in_a_Filter)
<<1}

# The Copy a Filter Dialog Box

## Database

If the filter you want to copy is not in the current database, open the drop-down list and select a database.

## Copy this Filter

Open the drop-down list and select the filter you want to copy.

## New Filter Name

Enter the name of the new filter. The words "Copy Of" will automatically be entered here, to stop you from saving the copy to its old name.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_To_Copy_a_Filter)<<1}

# The Select Filters to Analyze Dialog Box

## Available Filters

This shows all available filters in a list box on the left.

## Add, Add All, Remove, Remove All

Use the **Add** and **Remove** buttons to select individual filters to be analyzed. You can also double-click a filter to select or deselect it. (All filters in the list box on the right will be analyzed when you choose OK.)

Click **Add All** to select all of the filters. Click **Remove All** to prevent any of the filters from being analyzed.

## Filters to Analyze

Filters that have been selected for analysis are listed in this field.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Filter_Analysis_Counting_Records_in_a_Filter)<<1}

# The Filter Analysis Dialog Box

## Filter / Level 1-3

This text box displays an analysis of the number of records in each filter selected for analysis. The filter name appears on the left, and the number of records on each level on the right.

## Print

Clicking this button will send the contents of this dialog box to the default printer. Click **OK** to print, or click **Cancel** to cancel the printing and return to the Filter Analysis dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Filter_Analysis_Counting_Records_in_a_Filter)
<<1}

# The Field Search Dialog Box

### Select Field
Choose the field containing the data you want to search for.

### Select Operation
Choose the appropriate operator.

### Value to Search For
Type the data you are searching for.

### OK
Clicking this button will begin the search. When the search has completed, you will be taken to the first record in the database level that matches the search criteria.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Creating_Simple_Temporary_Filters_Field_Se
arch)<<1}

## The Select a Level to Delete/Recover Dialog Box

### Levels

Click the button corresponding to the level where you want to delete or recover a group of records. The Group Delete Dialog Box will open.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Deleting_and_Recovering_Records)<<1}

# The Extended Activity Dialog Box

### Description
Enter a clear description as you want it to appear on your Month Overview screen.

### Start Date
This will be filled in automatically. Adjust it if necessary.

### Duration
This will be filled in automatically. Adjust it if necessary.

### Personal
Choose this radio button if the item is to appear only on your own calendar.

### Global
Choose this radio button if the item is to appear on all users' calendars.

### Assigned By
The name of the user who created the extended activity

### Assigned To
If you want to do so, you may assign the extended activity to another user by choosing that user in the Assigned to dialog box. (Remember, in order to do this, you must have rights to edit that user's activities.)

### Comments
Add notes about the activity.

### Stamp
Click this button to add a date, time, and User ID stamp to the comments field.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_an_Extended_Activity_Multi_Day_Event)<<1}

# The Multiple Alarms Dialog Box

This dialog box shows a list of all currently overdue alarms, indicating when they were due and what they were for.

Clicking on any listed activity will permanently turn of its alarm.

### Off
If a check mark is in this column the activity’s alarm has been turned off.

### Date
This is the date of the activity.

### Time
This is the time of the activity.

### Description
This is the activity’s description.

### Turn off all
Clicking this button will permanently turn off all alarms.

### Snooze all
Clicking this button will snooze all alarms shown, for a period you have previously defined in your Activity Preferences.

### Go to selected activity when done
Marking this check box will bring up the highlighted activity as soon as you click **OK**. (Make sure you have an activity highlighted before clicking **OK**.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Handling_Alarms)<<1}

# Delete Recurring Activity Dialog Box

### This recurring activity for this date only

Mark this radio button to only delete the selected occurrence of the recurring activity.

### All related recurring activities

Mark this radio button to delete every occurrence of the recurring activity, past and future.

### All related recurring activities following this one

Mark this radio button to delete every future occurrence of the recurring activity, except the one currently selected.

### All related recurring activities except this one

Mark this radio button to delete every occurrence, past and future, of the recurring activity, except the one currently selected.

### Delete

Click this button to delete the activity or activities.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND2_To_Delete_a_Recurring_Activity)<<1}

# Word Processor Document Dialog Box

## Tree View

This is a graphical representation of your documents and templates. Under the main folders are folders for user, database, and global items. Individual items are stored in these folders. Click the plus sign next to each folder to open it. The source word processor for each document and template is indicated by the icon associated with the document or template.

## Add

Click this button to open the Add a Document dialog box and begin creating a new document or template.

## Edit

Click this button to open the document or template in the word processor used to create it.

## Print

Click this button to print the selected document.

## Copy

Click this button to open the Copy a Word Processor Document dialog box.

## Change

Click this button to open the Change Document Description dialog box.

## Delete

Click this button to delete the selected document. When you delete a document, you are given the option of deleting the document from the Word Processor Document list only, or deleting the file as well.

## To Contact

Click this button to close the Word Processor Documents dialog box and open the record linked to the selected document.

## Contact Info

Click this button to open the Contact Info screen, which displays key field information for the contact linked to the selected document.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½WORD1_Word_Processing_in_TeleMagic)<<1}

# Copy a Word Processor Document Dialog Box

## Word Processor

The word processor used to create the document is indicated in this field. This cannot be changed.

## Description

Enter the name of the new document or template as you want it to appear in the User Documents for (word processor) selection box.

## File Name

Enter the name and path of the new file. Click **File Name** to search for an existing file.

## Document created by (user name) on (date)

This tells you the creator and the creation date of the original document.

## Store In

Indicate the folder the copy is to be stored in by selecting the appropriate radio button.

## Merge Fields From Level

Select a database level you want to use for merge fields in this document or template.

## Link to (Current Contact / Other Contact / No Link)

Select a contact record to which this document or template is linked. If you do not want this document or template linked to a contact record, select `No Link`.

## Contact Info

If this document or template is linked to a contact record, and that contact record is in the current database, clicking this button will open the Contact Information dialog box, where you will see information from that contact record. If the contact record is in a different database than the one that is currently open, you will be asked if you want to close the current database and open that database. If you answer **Yes**, the new database will be opened and the contact information will be shown in the Contact Information dialog box. If you answer **No**, you will be returned to this dialog box.

## Search my contacts for

Enter the information to be searched for to find the desired contact record to which the copy is to be linked. This field becomes available when the `Other Contact` radio button is marked.

## Search

Click this button when you are ready to begin the search for the information entered in the `Search my contacts for` field. The current database will be searched.

## Advanced Search

Click this button to open the Advanced Search dialog box. Use this feature to link documents to records in other databases. This button becomes available when the `Other Contact` radio button is marked.

## Browse Contacts

Click this button to open a Browse window and select the record to be linked from the browse view. This button becomes available when the `Other Contact` radio button is marked.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WORD1_Copying_Documents_and_Templates)<<1}

# Add a Document Dialog Box

## Add a New
Select whether you are adding a new document or template.

## Word Processor
Select the word processor you will be using to create the new document from the drop-down list.

## Description
Enter the name of the new document as you want it to appear in the Word Processor Documents dialog box.

## File Name
Enter the name and path of the new file. Click **File Name** to search for an existing file.

## Use This Template
Open the drop-down list box and select a template or blank document.

## Store in
Select the folder that the new document will be stored in. You can choose User, Database, or Global.

## Merge Fields from Level
Select a database level you want to use for merge fields in this document.

## Link to (Current Contact / Other Contact / No Link)
Select a contact record to which this document is linked. If you do not want this document linked to a contact record, select `No Link`.

## Contact Info
If this document is linked to a contact record, and that contact record is in the current database, clicking this button will open the Contact Information dialog box, where you will see information from that contact record. If the contact record is in a different database than the one that is currently open, you will be asked if you want to close the current database and open that database. If you answer **Yes**, the new database will be opened and the contact information will be shown in the Contact Information dialog box. If you answer **No**, you will be returned to this dialog box.

## Search my contacts for

Enter the information to be searched for to locate the record the document is to be linked to. This field becomes available when the `Other Contact` radio button is marked.

## Search

Click this button when you are ready to search for the information entered in `Search my contacts for` field. This will search the current database.

## Advanced Search

Click this button to open the Advanced Search dialog box. Use this feature to link documents to records in other databases. This button becomes available when the `Other Contact` radio button is marked.

## Browse Contacts

Click this button to open a Browse screen for the current database and select the record to which the document is to be linked using the browse view. This button becomes available when the `Other Contact` radio button is marked.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½WORD1_Creating_a_Merge_Document_or_Template)<<1}

# Print Options Dialog Box

## Print For (Linked Record / Current Record / Filtered Records)

Select the radio button that will determine the source of merge field information:

> If you want to print this document or template using the information merged from the linked contact record only, select the `Linked Record` radio button. This option is only available if the document or template is linked to a record.
>
> If you want to print this document or template using the information merged from the current contact record only, select the `Current Record` radio button.
>
> If you want to print this document or template using the information merged from a list of filtered contact records, select the `Filtered Records` radio button. Selecting this radio button will make the Filter and Index lists available.

## Send to Print Queue

Mark this check box if you want to send this print job to a print queue in the Automation Server. The drop-down list will become available. This list will include all queues that begin with **Print Queue**. Select the desired queue from the list.

## Preview Merge

Mark this check box if you want to preview the merged document(s) or template(s) before printing.

## Save Merged Files

Mark this checkbox and a copy of each merged document will be generated. These files will be given names consisting of the source documents name, plus a number which is incremented for each merge. The part of the file name which is derived from the source document name will be truncated as necessary to accommodate the generated file name.

> **Warning!** Use this feature with caution. Large numbers of files may be generated and stored.

## Filter

Open this drop-down list box to select the filter you want to use when printing this document or template.

## Index

Open this drop-down list box to select the index you want to use when printing this document or template.

## Stamp Options

Clicking this button opens the Stamp Options dialog box, where you will see the information that will be stamped to a memo field in a contact record and/or to the comments of an activity depending on the settings you have set up in Preferences.

Starting a Mail Merge Using TM-Merge

# Stamp Options Dialog Box

## Date / Time / User ID / Text Window

When this dialog box is opened, the top line will show the date, time, User ID and User Name similar to the stamp that may be placed in a memo field of a contact record or the comments field of an activity if the appropriate settings have been turned on.

The text window shows the other information relating to this printing operation that would be added to the stamp.

## Notepad Stamp

If you have turned this option on in Preferences, this check box will be marked. If you have not already turned on this option, this check box will be unmarked. You can change the setting of this option for this printing job as you desire. Changing the setting here will not change the setting in Preferences.

## Create Activity

If you have turned this option on in Preferences, this check box will be marked. If you have not already turned on this option, this check box will be unmarked. You can change the setting of this option for this printing job as you desire. Changing the setting here will not change the setting in Preferences.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½PREFS_Setting_Preferences)<<1}

# The Database Files Dialog Box

Use this dialog box to select which databases are to be included in the rebuild. Then, from the check boxes below the selection lists, unmark related files and database options which you do not want to rebuild.

## Available Databases/Databases to Rebuild

From the Available Databases list, select the database you want to rebuild, then click **Add**. TeleMagic will add the database name to the Databases to Rebuild list. To add all databases to the Rebuild list, click **Add All**. To remove a database from the rebuild list, highlight it and click **Remove**. To remove all databases from the Rebuild list, click **Remove All**.

## Contact Data

Mark this check box if you want contact records to be rebuilt.

## Filters

Mark this check box if you want filters to be rebuilt.

## Export Formats

Mark this check box if you want new export formats to be rebuilt.

## Import Formats

Mark this check box if you want new import formats to be rebuilt.

## Quick Lists

Mark this check box if you want new quick lists to be rebuilt.

## Report File List

Mark this check box if you want new reports to be rebuilt.

## Views

Mark this check box if you want views to be rebuilt.

## Calculated Fields

Mark this check box if you want to recalculate calculated fields.

## Rebuild Only Level

Mark this check box if you want to only rebuild one particular database level instead of rebuilding all of the levels. The drop-down list will activate. Select the database level you want to rebuild.

> **Note**
>
> The default for this option is to always rebuild every level of a selected database. An example of when this option may be used is if you have a very large database and you have changed or added a field on one level. Since rebuilding the entire database could be a long process, you could choose to only rebuild the affected database level in order to have the database available for use in a much shorter time.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM1_Database_Files)<<1}

# The Global Files Dialog Box

Global Files store information that pertains to all databases and users of your copy of TeleMagic. Unmark the check boxes for the options which you do not want to rebuild.

### Database List
The Database List contains the names and storage locations of all database files.

### Security Data
This is the security settings for all users, groups, records, and fields.

### Word Processor
This data is related to global word processor files.

### Bulletin Board
Bulletin Board files contain all information concerning records on the Bulletin Board.

### Message Taker
These files contain all Message Taker messages.

### Sales Forecasting
Sales Forecasting files contain non-graphic data related to Sales Forecasting.

### Graphing
Graphs for the Sales Forecasting feature are stored in the Graphing files.

### NANP
These files contain your North American Numbering Plan information.

### Templates
Global template data is stored in these files.

### E-mail
These files contain global e-mail information.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM1_Global_Files)<<1}

# The Rebuild Confirmation Dialog Box

### Rebuild will begin:

If you want the rebuild to proceed, do nothing. The rebuild will run at the date and time indicated. The dialog box will remain on the screen until the appointed time. You can switch (ALT+TAB) to other Windows programs and use them, though you cannot use your copy of TeleMagic until the rebuild is finished.

### Start

Click this button to begin the rebuild immediately.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM1_Rebuilding_Data_Rebuild)<<1} Rebuilding Data (Rebuild)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM1_Precautions_when_Rebuilding_on_a_Network)<<1} Precautions when Rebuilding on a Network

# The User Files Dialog Box

User Files store information that pertains to a specific user and all databases used by that user. Unmark the check boxes for the options which you do not want to rebuild.

### Tags
This is the list of tagged records stored in user files.

### Word Processor File List
This is the list of documents stored in the user files.

### E-mail
This is the user’s e-mail records.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM1_User_Tables)<<1}

# The Floating Files Dialog Box

Floating Files are files which store information separate from, but related to, a contact database. Activities, function keys, toolbars, user-defined list boxes, scripts, and E-mail are all saved in files separate from the database to which they relate. Unmark the check boxes for the options which you do not want to rebuild.

## Activities

This is the activities file.

## Function Keys

This is the function key file.

## Tool Bar Config

This is the toolbar file.

## List Boxes

This is the user-defined list box file.

## Scripts

This is the scripts file.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM1_Floating_Files)<<1}

# The Select Marked Record Dialog Box

### Database
This column lists the database containing the marked record. Any database with one or more marked records will be listed.

### Level
This column lists the database level containing the marked record.

### Description
This column lists the descriptor key field from the record that is marked.

### Clear Mark
Clicking this button will unmark the Marked check box on the highlighted record.

### Clear All
Clicking this button will unmark the Marked check box on each record shown.

### Goto
Clicking this button will take you to the highlighted marked record.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Marked_Records)<<1}

# The Export Formats Selection Box

### Run
Highlight an export format and click this button. The Output Filename dialog box will open.

### Add
Clicking this button will add a new export format.

### Change
Clicking this button will change the highlighted export format.

### Delete
Clicking this button will delete the highlighted export format.

### Copy
Clicking this button will copy the highlighted export format.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records)<<1} Exporting Records

# The Activity Options Dialog Box

### Include Activities (Linked Activities / Unlinked Activities / All Activities)

Select the radio button corresponding to the link status of the activities to be exported.

### Date Range (From / To)

Mark this check box to activate the From and To date range fields. In these fields, enter the date range of the activities you want to export, or use the Date Picker icons to select a date.

### Include Unlinked Activities for (All Users / Individual User)

This area becomes available if you have selected either the `Unlinked Activities` or `All Activities` radio button at the top of this dialog box. Select the `All Users` radio button if you want those unlinked activities from all users. Select the `Individual User` radio button and then open the drop-down list box and select the name of the user whose unlinked activities you want to export.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records)<<1} Exporting Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

# The Choose Fields To Export Dialog Box

Even if you have chosen to export all *records* in a database, you must define which *fields* within each record are to be included in the export format.

This dialog box allows you to make sure you do not export any sensitive information, such as costs or salary data, unintentionally. Choose the fields you are exporting with care. Always double-check your exported data before sending it to anyone outside your company, by typing it out or opening it with another program.

By default, all of the fields will be on the left side of this dialog box, which means that they are not selected for export.

### Available Fields
All fields available for selection are listed in this field.

### Add
Highlight a field name on the left side of the dialog box, then click this button. The field will be moved to the right-hand side, indicating it will be exported.

### Add All
Click this button to export data from all fields.

### Remove
If you have inadvertently added a field that you do not want to export, highlight it and click this button.

### Remove All
Click this button to remove all fields from the list of fields to export.

### Selected Fields
All fields that have been selected for inclusion in the export are listed in this field.

### Adjusting Field Order in this Dialog Box
To adjust the order of the fields to export, select any field and drag its positioning arrow up or down as required. The field will move when you drag, and end up where you leave it.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

# The Export-Assign Output Field Names Dialog Box

dBase is the only export format that requires fields to have unique field name assignments. If you are notified that you have duplicate field names; or if you want to adjust field name assignments, use this dialog box.

## Field Exported

This is a list of the original TeleMagic field prompts and field names.

## Assignment

This is a list of output field names proposed by TeleMagic. Any duplicate names will be highlighted.

## New Field Assignment

To change an output field name, highlight the field to be changed, then type a new name in this text box.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

# The System Level Security Screen

The System Level Security screen is where you create security groups. This screen also controls who is a member of which security group, and which of the major features and databases the group has access to.

### WARNING!

Make sure that you keep careful records of security group names and memberships. A user should never be a member of more than one security group. If a user is a member of more than one security group, TeleMagic combines rights, allowing that user access to any feature allowed by any group to which the user belongs. This could cause weaknesses in your security setup. (Of course, if a user is a member of the Supervisor Group, he or she will have full rights to all features automatically.)

### Change settings for security group

Open the drop -down list and select the group whose security you want to modify.

### Change security group description

If you want to change the name of the security group, enter the new name here. If you have clicked Add to add a new security group, enter the name of the new security group here.

### Add new database

Mark this check box if the group members should be able to add databases, but not delete them.

### Delete database

Mark this check box if the group members should be able to delete databases.

### Edit preferences

Mark this check box if the group members should be able to edit User Preferences.

### Allow rebuild

Mark this check box if the group members should be able to access the File menu's Rebuild option.

### Current Members

List of all users. Members of the current security group indicated with an “X”.

### Existing databases

This is a list of all databases in the system. Databases to which the group already has access will be grayed out.

### Accessible databases

This is a list of all databases to which the current group has access.

### Add, Add All, Remove, Remove All

These buttons allow you to move databases from the Existing list to the Available list, and vice versa.

### Database security

Click this button to bring up the Database and Field Security screen. There you can establish database security for the current group.

## Add, Delete, Copy

Click the appropriate button when you want to add, copy, or delete a security group.

## Cancel

Closes the dialog box. You can also close by clicking ESC. In either case, you will receive a message to confirm your decision to close.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_To_Add_a_Security_Group)<<1}

# The Database And Field Security Screen

Database-related security is controlled from this screen, which allows you to make only certain fields or records available to users.

**WARNING!**

Make sure that you keep careful records of security group names and memberships. A user should never be a member of more than one security group. If a user is a member of more than one security group, TeleMagic combines rights, allowing that user access to any feature allowed by any group to which the user belongs. This could cause weaknesses in your security setup. (Of course, if a user is a member of the Supervisor Group, he or she will have full rights to all features automatically.)

## Database Security for

This field shows the name of the database that was highlighted in the Accessible Databases list when you opened this dialog box. To adjust the security settings for a different database, open the drop-down list and select the desired database.

## Full Access All Fields

Mark this check box to allow this security group the ability to access every field in this database. If this check box is marked, the Field Access options will not be available.

If you want to set up specialized access to any fields for this security group, do not mark this check box and you can then use the Field Access options to set up that access.

## Field List

Highlight any field here for which you want to adjust the security access. The field name will appear in the Selected Field window. You can then make your accessibility choices using the Field Access options.

## Selected Field

The field that is currently selected in the Field List is indicate in this field.

## Field Access (No Access / View / Edit/View)

Select the radio button that corresponds to the type of access you want this security group to have for this field.

Select the `No Access` radio button to restrict access to this field. Even if the field is placed on a page, members of this security group will not see it on the screen..

Select the `View` radio button to restrict the access to this field to only view the contents.

Select the `Edit/View` radio button to allow viewing and changing the contents of this field.

## List Box Options (Use / Modify)

Select the `Use` radio button if you want this security group to have the ability to use a list box that may be associated with this field.

Select the `Modify` radio button if you want this security group to have the ability to use and edit a list box that may be associated with this field.

### Memo Field

Mark this check box if you want to allow this security group the ability to add notes to a memo field.

### Select All

Click this button to set Field Access to Edit/View for all fields in the database.

### Unselect All

Click this button to set Field Access to No Access for all fields in the database.

### Add

Mark this check box to allow this security group the ability to add new records to this database.

### Import

Mark this check box to allow this security group the ability to import new records into this database.

### Export

Mark this check box to allow this security group the ability to export records from this database.

### Group Options

Mark this check box if you would like members of this group to be able to use the Group Replace, Group Delete/Recover, and Set Multiple Recalls features.

### Screen Designer

Mark this check box to allow this security group the ability to go into and use the Screen Designer.

### Database Preferences

If you marked the Edit preferences check box on the System Level Security dialog box, this option will be available. Mark this check box to allow this security group the ability to access Database Preferences.

### Filters

Mark the Edit check box to allow this security group the ability to edit filters. Mark the Add check box to allow this security group the ability to add new filters.

### Indexes

Mark the Edit check box to allow this security group the ability to edit indexes. Mark the Add check box to allow this security group the ability to add new indexes.

### User Reports

Mark the Edit check box to allow this security group the ability to edit reports and quick lists. Mark the Add check box to allow this security group the ability to add new reports and quick lists.

### Sales Forecasting (No Access / Add/Limited Edit / Full Edit/Add / Delete/Full Edit/Add)

Select the appropriate radio button to restrict the ability of this security group to access and work with sales forecast records.

Select the `No Access` radio button to deny the security group access to sales forecast records.

Select the `Add/Limited Edit` radio button to allow the security group to add sales forecast records but allow each user to have limited access to edit his or her own records.

Select the `Full Edit/Add` radio button to allow the security group access to add sales forecast records and allow each user full access to his or her own records.

Select the `Delete/Full Edit/Add` radio button to allow the security group the same access to sales forecast records as in the Full Edit/Add option, but also adding the ability to delete the sales forecast records.

## Record Level Access (View / Edit / Delete)

Click the button desired to open the Record Expression dialog box specific to that type of accessibility, where you can build a simple or advanced expression to set up the way this security group views, edits, and deletes records.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_To_Add_Database_Security_and_Visibility_Rules_to_a_Security_Group)<<1}

# View Record Expression Dialog Box

In this dialog box you can build a filter that will specify what records the group members will be able to view.

**Example:** You might want a group to only be able to view records in a database for a particular region.

### Field

From the Fields list box, select the field you want to use to select records.

### Compares

From the Compares list box, pick the appropriate comparison.

### To

In the To text box, type the information you will use to select records.

#### Note

If you are creating a filter to search for empty fields (such as when looking for records with no phone numbers), use the .EMPTY variable. Example: Contact2.usphone=.EMPTY

### AND/OR

If you are creating a filter with more than one criterion, tab to the And/Or field and type A for AND or O for OR. AND means that both the preceding and the following criterion must be true; OR means that either the preceding or the following criterion should be true.

#### Examples:

"Account Rep Equal JRC AND State Equal CA" will allow viewing of records which are located in California whose account rep is JRC.

"Account Rep Equal JRC OR State Equal CA" will allow viewing of records whose account rep is JRC, as well as all the records in California.

### Advanced

Click this to create a more complex expression using the TeleMagic Expression Builder.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_To_Add_Database_Security_and_Visibility_Rules_to_a_Security_Group)<<1}

# The Edit Record Expression Dialog Box

In this dialog box you can build a filter that will specify what records the group members will be able to edit.

**Example:** You might want a group to be able to view all records in a database, but only edit the records for a particular region.

If you do not create a filter in this dialog box, the group will be able to edit all records to which they have View rights.

## Field

From the Fields list box, select the field you want to use to select records.

## Compares

From the Compares list box, pick the appropriate comparison.

## To

In the To text box, type the information you will use to select records.

### Note

If you are creating a filter to search for empty fields (such as when looking for records with no phone numbers), use the .EMPTY variable. Example: Contact2.usphone=.EMPTY

## AND/OR

If you are creating a filter with more than one criterion, tab to the And/Or field and type A for AND or O for OR. AND means that both the preceding and the following criterion must be true; OR means that either the preceding or the following criterion should be true.

**Examples:**

"Account Rep Equal JRC AND State Equal CA" will allow editing of records which are located in California whose account rep is JRC.

"Account Rep Equal JRC OR State Equal CA" will allow editing of records whose account rep is JRC, as well as all the records in California.

## Advanced

Click this to create a more complex expression using the TeleMagic Expression Builder.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_To_Add_Database_Security_and_Visibility_Rules_to_a_Security_Group)<<1}

# The Delete Record Expression Dialog Box

In this dialog box you can build a filter that will specify what records the group members will be able to delete.

Example:   You might want a group to be able to view all records in a database, but only delete the records for a particular region.

If you do not create a filter in this dialog box, the group will be able to delete any records to which they have View rights.

## Field

From the Fields list box, select the field you want to use to select records.

## Compares

From the Compares list box, pick the appropriate comparison.

## To

In the To text box, type the information you will use to select records.

### Note

If you are creating a filter to search for empty fields (such as when looking for records with no phone numbers), use the .EMPTY variable. Example:   Contact2.usphone=.EMPTY

## AND/OR

If you are creating a filter with more than one criterion, tab to the And/Or field and type A for AND or O for OR. AND means that both the preceding and the following criterion must be true; OR means that either the preceding or the following criterion should be true.

### Examples:

"Account Rep Equal JRC AND State Equal CA"   will create a filter which will allow deletion of records in California whose account rep is JRC.

"Account Rep Equal JRC   OR   State Equal CA"   will create a filter which will allow deletion of records whose account rep is JRC, as well as all the records in California.

## Advanced

Click this to create a more complex expression using the TeleMagic Expression Builder.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_To_Add_Database_Security_and_Visibility_Rules_to_a_Security_Group)<<1}

# The Add a Database Dialog Box

## Add New Template
Choose this option if you want to add another template to the list currently displayed in this dialog box.

## Blank Database
Choose this option if you want to add a new database with no fields or views already set up.

This template should never be deleted. It is the template for a blank (empty) database.

## Install
Highlight a template from the list and click this button to create a new database based on it. An Add a Database dialog box will open, allowing you to enter a name and directory for the new database. If you highlight Add a Template and then click Install, the Install a Template Screen will open.

## Remove
Highlight the template you want to delete, and click this button to remove it from the list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE_Database_Installation_and_Configuration)<<1}

# The Install a Template Dialog Box

### Please enter the path to the Template Files (DBtypes)
Enter the path to the template files (DBTYPES.*).

### OK
Click this button to start installing the template(s) contained in the DBTYPES.* files to which you have just pointed.

The program will display a status message while it is copying. When finished, you will be returned to the Add a Database dialog box. The newly copied template will now be in the list of available templates. Follow the instructions in the message box which appears at this stage.

### Browse
If you are not sure where the template files are located, click this button and find them using the Select Directory dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE_To_Install_a_Database_Based_on_an_Existing_Template)<<1}

# The Error Log Dialog Box

The basic information about the error is displayed on the left-hand side of this screen, but you can use the buttons on the right to find out about the status of the user's environment when the error was logged, and the user's description of the error:

### Version
This shows the version number of this installation of TeleMagic Enterprise.

### User
This shows the User ID of the user that created the error log entry.

### Date
This shows the date when the error log entry was created.

### Time
This shows the time when the error log entry was created.

### Error
This shows the type of error that occurred when the error log entry was created.

### Program
This shows the program file running when the error log entry was created.

### Line
This shows the program line of the program file that was running when the error log entry was created.

### Action
This is an internal code added to the error log entry.

### Message
This shows the error message received when the error log entry was created.

### Program Status...
Click this button to view a record of the exact status of TeleMagic when the error occurred: which tables were open, which indexes were in use, etc.

### Memory Variables...
Click this button to view the contents of TeleMagic memory variables at the time of the error log.

### Data Structures...
Click this button to see a description of all data tables which were open when the error occurred.

### CONFIG.SYS...

Click this button to see a copy of the workstation’s CONFIG.SYS file at the time of the error log.

### AUTOEXEC.BAT...
Click this button to see a copy of the workstation’s AUTOEXEC.BAT file at the time of the error log.

### WIN.INI...
Click this button to see a copy of the workstation’s WIN.INI file at the time of the error log.

### SYSTEM.INI...
Click this button to see a copy of the workstation’s SYSTEM.INI file at the time of the error log.

### TM.INI...
Click this button to see a copy of the user's TM.INI file at the time of the error log.

### Misc. Info...
Click this button to view miscellaneous information about the environment and status of TeleMagic at the time of the error log.

### User Answer...
Click this button to view the user's description of the error. This description can be edited or added to at this point.

### Print
Clicking this button will print the current error log entry.

### Delete
Clicking this button will delete the current error log entry.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_Logging_and_Viewing_Errors)<<1}

# The User Answer Dialog Box

## User’s Text

This is a text box that reports the information entered by the user at the time the error log entry was created.

## Summary

This is a second text window that is intended to contain a summary of the fault.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Logging_and_Viewing_Errors)<<1} Logging and Viewing Errors

# The Error Report Dialog Box

**WARNING!**

The Error Report prints a listing of every error in the system error log, either for all users or for a selected user or group of users. To print a report on a *single* error, choose View System Log from the Help menu.

## All Users

Choose this radio button if you want to have a report that includes all users.

## Select Users

If you want to limit the report to the logs of one or more particular users, choose this radio button. The Select Users to Report On dialog box will open.

## User Explanation

Mark this check box to include the user explanation/comments (as seen in the User Answer dialog box) in your report.

## Technical Info

Mark this check box to include the system information (i.e., the status of Windows and TeleMagic).

**Note**

Consider periodically clearing this error log of errors which have been dealt with.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Error_Report)<<1}

## The Select Databases to Report On Dialog Box

### Add

Select the databases you want to report on from the list on the left by highlighting them and clicking this button.

### Add All

Click this button to report on all databases.

### Remove

Remove databases from the report by highlighting them in the list on the right and clicking this button.

### Remove All

Click this button to remove all databases from the report.

# The Select Users to Report On Dialog Box

## Add

Select the users you want to report on from the list on the left by highlighting them and clicking this button.

## Add All

Click this button to report on all users.

## Remove

Remove users from the report by highlighting them in the list on the right and clicking this button.

## Remove All

Click this button to remove all users from the report.

# The Print Custom Report Dialog Box

This dialog box shows the current index and filter settings for the report, and allows you to preview and print the report.

### Report

This is the name of the report you selected to print.

### Current Filter

Open this drop-down list box to select a filter to be used when printing this report.

### Current Index

Open this drop-down list box to select an index to be used when printing this report.

### Current Record Only

Mark this check box to print the report using data from the current contact record only.

### All Children of Current Record

This check box is only available if the current contact record is not on the lowest level of the current database. Mark this check box to print the report using the data from just the child contact record(s) of the current contact record.

### Print

To print the report, click this button.

### Preview

Click this button to see the report before it prints.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1}

# The Print Custom Activity Report Dialog Box

This dialog box allows you to change the activity settings for the report, and allows you to preview and print the report.

## Report

This is the name of the report you selected to print.

## Set Activity Filter

Click this button to open the Activity Filter dialog box, where you can select user-specific and different types of activities on which to report.

## Index

Open this drop-down list box to select an index to be used when printing this report.

## Print

Click this button to print the report.

## Preview

Click this button to see the report before it prints.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1}

# The Activity Filter Dialog Box

### Activities assigned to
In this field, click the names of the users on whom you want to base the report.

### Activity Type
Here you can limit the activity report to a certain type.
For example, in the case of the Call History report, Activity Type should be limited to calls.

### Activity Status
Here you can limit the activity report to a certain status.

### All Activities / Completed Only / Pending Only
Choose the radio button that corresponds to the activity status you desire.

### To-Do's
Mark this check box to include To-Do's in this report.

### Priority One / Priority Two / Priority Three / No Priority
Mark the appropriate check boxes for the Priority level(s) that you want to include in the report.

### Due Date / Time Range
If you want to include incomplete activities, in the Start Date and End Date fields, type a date range for the scheduled completion of the activities on which you want to base the report. If you want to include incomplete activities, in the Start Time and End Time fields, type a time range for the scheduled completion of the activities on which you want to base the report.

### Completion Date / Time Range
In the Start Date and End Date fields, enter the dates between which the activities you want to report on took place. In the Start Time and End Time fields, enter the times between which the activities you want to report on took place.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports

# The Custom Reports Selection Box

### Print
Click this button to print the selected custom report. The Print Custom Report dialog box will open.

### Add
Click this button to add a new report. The Custom Report dialog box will open.

### Change
Click this button to change the highlighted custom report. The Custom Report dialog box will open.

### Delete
Click this button to delete the highlighted custom report. (You will have the chance to cancel this action should you need to do so.)

### Copy
Click this button to copy a custom report from the current or another database. The Copy Report dialog box will open.

### More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

# The Copy Report Dialog Box

**WARNING!**

Reports and Quick Lists are database-specific; that is, you cannot create a report with one database open, and expect to be able to use it automatically in another database. TeleMagic does, however, give you the option of copying a report from a different database, and using it (where possible) in the current database. Of course, often the differences in structure between two databases will mean that a report created in one will be useless in another; but with some adaptation, you will find that one report can serve the same purpose in several different databases.

## Database

Open this drop-down list and select the source database.

## Report

Open this drop-down list and select the report you want to copy from the source database.

## Copy

Click this button to start copying the selected report. The dialog box will close, and the copied report will appear in the Custom Reports selection box.

## More About…

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½RPT3_Copying_Reports_and_Quick_Lists_from_Another_Database)<<1} Copying Reports and Quick Lists from Another Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½RPT3_To_Modify_a_Custom_Report_or_Quick_List_and_Keep_the_Original)<<1} Copying Reports and Quick Lists from the Current Database:

# The Report Menu Configuration Dialog Box

There are many types of reports that you will want to print more than once. Some you may want to use every day, or even several times a day. By configuring your Reports menu, you can facilitate the printing of reports, labels, envelopes and even Quick Lists:   Instead of having to open several dialog boxes each time you need to print a list or report, you can simply select that report from the Reports menu.

**Note**
Once the Reports menu is full, an option will be added to the bottom of the menu for More User Defined Reports. Selecting this option will bring up a sub-menu with the remaining reports.

## Custom Reports/Quick Lists

On the right is a list of your current Reports menu, and on the left the Custom Reports and Quick Lists available to you. Scroll through these lists until you find the item you want to add to the menu.

To add an item, double-click on it, or highlight it and click **Add>>**, or highlight it and press ENTER. It will appear as the last entry in the Reports menu configuration list box on the right-hand side of the screen.

To move the item to another position on the menu, hold the cursor over the mover button next to the item that you want to move. The cursor will change to a double-headed arrow. Click and drag the button to the desired position on the menu.

**Note**
If the item is dragged into the top section of the menu containing the standard reports, it will not stay there when dropped. These sections cannot be reconfigured. You can only reconfigure the bottom section of the menu.

To add a separator to the menu, select the item which should appear below the separator and click **Separator**. Separators can be moved in the same way as other menu items.

## Remove

To remove items from the menu, highlight the item you want to remove and click this button. Double-clicking an item will also remove it from the list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT4_Reports_Menu_Configuration)<<1}

# The Quick Lists Selection Box

### Print
Choose this to print the selected Quick List. The Print Quick List dialog box will open.

### Add
Click this button to add a new Quick List. The Quick List dialog box will open.

### Change
Click this button to change the highlighted Quick List. The Quick List dialog box will open.

### Delete
Click this button to delete the highlighted Quick List. (You will have the chance to cancel this action should you need to do so.)

### Copy
Click this button to copy a Quick List from the current or another database. The Copy Quick List dialog box will open.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT2_Producing_Quick_Lists)<<1}

# The Print Quick List Dialog Box

This dialog box shows the current index and filter settings for the Quick List, and allows you to print the Quick List.

## Report
This shows the Quick List that will be printed.

## Filter
This shows the current filter selected for this report.

## Index
This shows the current index selected for this report.

## Current Record Only
Mark this check box to print the Quick List using data from the current contact record only.

## All Children of Current Record
This check box is only available if the current contact record is not on the lowest level of the current database. Mark this check box to print the Quick List using the data from just the child contact record(s) of the current contact record.

## Print
Click this button to begin the printing process.

**Note**

The following error message may appear at this point: "Sorry! This Quick List contains contact fields that haven't been built into the contact database yet. Run a rebuild on this contact database, then try again." In this case, run a rebuild. If the rebuild does not fix the problem, there is a deeper security issue involved: you are trying to print a Quick List that contains fields to which you do not have full security rights. See your system administrator if you want to change your field access rights.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1}

# The Select Fields for the Quick List Dialog Box

The purpose of this dialog box is to let you design the Quick List. Here you can decide which fields it will include; in what order those fields will appear; and whether there will be any lines separating parts of the list.

## Fields to Select from

This shows the list of fields available for the Quick List.

Data from each field will appear on the Quick List beneath the field prompt. Field prompts will appear in order from left to right across the page until a new line is specified.

Select and add Tab to insert extra space between fields on the same line.

Select and add New Line to begin a new line of fields.

Select and add Draw a Line to insert a line after a group of fields.

Use the slider buttons to change the field order in the list on the right.

## Fields to Report on

This shows those fields currently included in the Quick List.

## Add

Click this button to add the selected field to the Quick List. The field name will appear in the Fields to Report on list on the right side of the dialog box.

## Add All

Click this button to add all of the available fields to the Quick List. The field names will appear on the right side of the dialog box.

## Remove

Click this button to remove the selected field from the Quick List. The field name will appear in the Fields to Select from list on the left side of the dialog box.

## Remove All

Click this button to remove all fields from the Quick List. The field names will appear on the left side of the dialog box.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT2_Producing_Quick_Lists)<<1}

# Import Formats Dialog Box

## Run

Highlight an import format and click this button to execute it.   The File to Import... dialog box will open.

## Close

Clicking this button will close the Import Formats selection box.

## Add

Clicking this button will open the File Import Formats dialog box, where you can add a new import format.

## Change

Clicking this button will open the File Import Formats dialog box, where you can change the highlighted import format.

## Delete

Clicking this button will delete the highlighted import format.

## Copy

Clicking this button will copy the highlighted import format.

# The Go To Date Dialog Box

### Calendar

Click on scroll arrows at the top of the dialog box to flip the Go to Date calendar pages by year (upper set) or month (lower set). Click on a specific date to select that date. A box will appear around the date you have selected.

### Selected Date

The date on this button, located below the calendar, will change depending on which day of the calendar is highlighted. Click this button to select the indicated date.

### Today

Click this button to select today's date (based on the system date in your workstation).

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_the_Calendar_Views)<<1} Working with the Calendar Views

# The Preferences Dialog Box - Activity Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Days in Weekend

Mark the day(s) that you want to designate as weekend days for scheduling purposes. When scheduling an activity on a weekend day, you will receive a notification that it is a non-work day and be given the option to proceed. Your weekend days will also be taken into account when automatically generating activities, such as through recurring activities and multiple recalls.

### Location of Activity Files

When you schedule activities, TeleMagic stores the information in a file named ACTIVITY.DBF, which is stored by default in the global TeleMagic directory. This file contains activity information for all users.

You may want to store your activity information in a separate ACTIVITY.DBF file. Rather than sharing the activity file with all other users, this allows you to keep your activities separate, or share with only selected uses who are pointing to the same location. Be aware that if you change the path to your activity files, you will not be able to schedule activities or have any activities scheduled for you by other users who do not have the same location of activity files.

Enter the name of the desired file path in which the activity files will reside, or click this button and search for a location.

### Default Description to Record Descriptor when linking

If this check box is marked, when an activity is linked to a contact record, the descriptor (based on the Record Descriptor expression in Key Fields) for the linked contact record will be placed in the `Description` field of the activity. If there is already text in the `Description` field it will be overwritten with the descriptor information.

### Link to Current Contact by default

Mark this check box to automatically have any new activity that is created linked to the current record.

### Allow all users Group Scheduling rights to your calendar

Mark this check box to allow any user creating or editing a group activity to include you in that activity, whether or not that user has been granted activity permissions to your calendar. This allows you to be included in group activities, without forcing you to grant users more extensive permissions to your schedule. If this check box is not marked, users will only be able to include you in group activities if you have granted them scheduling rights to your calendar.

### Show Time in Blocks of

The Day at a Time and Week at a Time view calendar pages show each day divided into time slots for viewing activities. You can control the length of time represented by each time slot. The default time block is every 30 minutes, but you can change the interval to every 5, 10, 15, or 60 minutes. It is recommended that you set this to correspond to your average activity duration.

### Default activity duration

This setting provides a default activity length for all new activities. The time block entered into this field will be offered in the `Duration` field when you add an activity. It can be edited for individual activities if necessary.

### Maximum activities per day

This option allows you to prevent overbooking your appointment schedule. Type in, or use the spinner arrows to set, a maximum number of scheduled items per day. If you attempt to set an activity when you have already reached this maximum, you will receive a warning and be given the option to proceed. Select 0 if you do not want to set a limit. (The maximum supported by TeleMagic for Windows is 1440, per user, per day).

### Minimum time gap between activities

This option allows you to set a minimum interval between scheduled items to allow time for preparation and wrap-up following appointments and meetings. Type in, or user the spinner arrows to set, a time in minutes. If you attempt to schedule an activity that is within the specified time span following an existing activity, you will be given a warning and asked if you would like to schedule anyway.

### New Alarm/Snooze Interval

The TeleMagic alarm program checks at regular intervals to determine if there are any alarms pending for which you need notification. The `New Alarm/Snooze Interval:` setting allows you to set that interval. This option determines how often TeleMagic looks to see if any alarmed activities have become due, and additionally determines how much time you have before the alarm is re-activated if you choose **Snooze** when an activity alarm goes off.   If you want to disable all occurrences of all alarms, set Snooze Minutes to zero.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Activity_Preferences)<<1} Activity Preferences

# The Preferences Dialog Box - Contact Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

If you have more than one view for each level of a database, you can select the view that you use most often on each level and set it as your default view for that level. TeleMagic will display the selected view by default whenever you open that level. Additionally, if you have more than one page in your default view, you can set a default for which page should display when that view is first opened. When you select a default page, TeleMagic will show that page first when you open the associated view.

**Note**

If you have **Save Settings on Exit** selected, it will override your Contact preference settings. (See Saving Settings and Exiting TeleMagic for more information.)

## Tabs

Select the tab corresponding to the preference set you want to edit.

## Default View and Page for Level 1

Open the drop-down list to select a view that will be used for Level 1 of the current database. Then open the second drop-down list and select the page that will be used by default from this view.

## Default View and Page for Level 2

Open the drop-down list to select a view that will be used for Level 2 of the current database. Then open the second drop-down list and select the page that will be used by default from this view.

## Default View and Page for Level 3

Open the drop-down list to select a view that will be used for Level 3 of the current database. Then open the second drop-down list and select the page that will be used by default from this view.

## Startup Database

Open the drop-down list to select a default database that will open first every time you launch TeleMagic.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Contact_Preferences)<<1} Contact Preferences

# The Preference Dialog Box - Dialer Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

## Tabs

Select the tab corresponding to the preference set you want to edit.

## Local Area Code

Enter your local area code here. This lets TeleMagic know what numbers are local and which are long distance.

## Dialer Prefix

This field should contain any digits that you need to dial in order to get an outside line. For example, PBX or Centrex systems often require a 9 to access an outside line. (Not all phone systems will require an entry in this field. For example, if you are sharing a single-line telephone with your computer and your phone gives you an outside line whenever you pick it up, you should leave this field blank.) When auto-dialing phone numbers, TeleMagic Enterprise automatically adds the prefix to every phone number.

> **Note**
>
> In some cases, you may be required to dial one number to access an outside line when placing long distance calls, and a different number when placing local calls; for example, some PBX or Centrex systems require an 8 for an outside, long-distance line and a 9 for an outside, local line. (Check with your telecommunications professional for more information.) In this circumstance, leave the `Dialer Prefix` field blank and place the numbers you need to dial for an outside line in the `Prefix for Local Call` and `Prefix for Long Distance` call fields. Only use the `Dialer Prefix` field if your phone system requires you to dial a number to access an outside line which is applicable both when dialing a local number and a long distance number.

## Prefix for Local Call

This field is used if your phone system requires that any number be dialed for a local call which is not required when dialing a long distance call. Enter that number in this field.

## Prefix for Long Distance Call

This is the number you dial when placing a long distance call; for example, in North America, the prefix for long distance calls is 1. Place the required number in the `Prefix for Long Distance Call` field.

> **Note**
>
> If your telephone system requires an accounting code to be entered after a long distance number is dialed, you may have to dial this code manually. It is possible that you can have it as a dialer suffix; contact your telecommunications professional for more information.

## Prefix Override Character

This character, when placed anywhere in a phone field on the Contact Manager, tells TeleMagic to dial any phone number it sees without modification, regardless of if it is in the local area code or not. You can define what character TeleMagic will read as a Prefix Override character by entering it in this field. Use this with care. We recommend that you leave it as something very unlikely to be found in a phone number, such as the caret (^).

## Dialer Suffix

This string is sent out at the end of each phone number that is dialed. In more sophisticated telephone systems, this can be a clever way to transfer calls from single-line dialers to multi-line telephones (so modem- or dialer-initiated calls can appear on a telephone with advanced features). It can also enter a charge code for long-distance calls. We recommend you contact your telecommunications professional for more information.

## Dial Using

Select the dialer device to be used from the drop-down list.

## Custom Configuration

Mark this checkbox if you need to use custom modem settings. This is intended for use with systems which allow dialing without using a modem.

## Settings

This button becomes available when you have marked the Custom Configuration checkbox. Click **Settings** to open the Custom Dialer Configuration dialog box. See your hardware documentation for information on the correct settings.

## Tone / Pulse

While most modern telephone systems and telephone central offices support touch-tone (tone) dialing, older systems supported pulse dialing (which sounds like clicks). Since pulse dialing is slower and does not work on many newer telephone systems, we recommend using tone dialing wherever possible. Select the `Tone` radio button if your system uses touch-tone dialing, or select the `Pulse` radio button if your system uses pulse dialing. This option is only available if you are using the dialer to dial using an alternative dialing system, and not using a TAPI modem.

## Zoom Dial

This is used in high-volume calling to automate repetitive tasks. If you mark `Zoom Dial,` as soon as you finish a call, TeleMagic will immediately go to the next contact in the selected filter and index and proceed to either launch the Dial menu if you dialed the first record from there, or it will proceed to dial the selected phone number if you used the Phone Icon beside a phone field to start the Zoom Dial process. If you are conducting telemarketing sales, phone surveys, or other tasks which require high-volume dialing, you should turn on `Zoom Dial`.

## Create Activity

If you want a new activity created for each phone call you make or receive, mark this check box. The call notes will be added to the activity's comments.

## Insert Notes into Notepad

If you want your call notes to be added to the memo field you have designated as your Notepad, mark this check box.

## Prompt for Setting Recall

If you will not be recording call notes (if you have not selected `Create Activity` or `Insert Notes into Notepad`) and want to receive a prompt asking if you would like to set a recall at the conclusion of each call, mark this check box. If you do not want to be prompted, leave this box unmarked.

> **Note**
> This check box will only be available if both the `Create Activity` and `Insert Notes into Notepad` check boxes are unmarked.

## Initially Bring up Call Notes

If you would like the Call Notes dialog box to come up immediately after a call is dialed or answered, mark this check box. If you would prefer to go to the contact's record first, then access the dialog box using the **Call Notes** button on the toolbar, unmark this check box.

> **Note**
> This check box will be unavailable if neither the `Create Activity` or `Insert Notes into Notepad` check box is unmarked. (If you are not creating an activity or stamping the notepad, you will not receive the Call Notes dialog box.)

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences

# The Preference Dialog Box - Directory Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

## Tabs

Select the tab corresponding to the preference set you want to edit.

## Function Keys

Function keys in TeleMagic allow you to create macros to automate frequently performed tasks. You have the option of using global, database specific, or user specific user-defined function keys.

### Global Directory

If you want to create function keys that can be shared with other users, and are available in all areas of TeleMagic, regardless of what database is open, select the `Global Directory` radio button. Any function keys that you set up will be available to any other users who also have their function keys set to the global directory; and you will be able to access any function keys those users have set up. (The global directory is where TeleMagic is installed.)

### Database Directory

If you primarily create function keys to perform database specific tasks, consider storing your function keys in the database directory. Any function keys you set up while a database is open will be accessible from that database by you and any other users who have their function keys set to the database directory. (They will not be accessible from other databases. If you need to access a function key in more that one database while storing them in the database directory, you will need to create it in each database separately.) You will also be able to access any function keys set up in the current database by any other users using the database directory.

### User Directory

If you want to create function keys for your personal use only, select the `User Directory` radio button. Any function keys you create will be accessible from anywhere within TeleMagic whenever you log in using your User ID. (You will not be able to share function keys with other users with this setting.)

## List Boxes

List boxes allow you to quickly fill in fields by selecting an item from a list. You populate the lists with items that would commonly be entered into the field. (For example, a list box for a State field would contain the states.)

### Note

Because list boxes in the Contact Manager are attached to fields, and are only accessible from the field, many list boxes themselves are database specific. You will only be able to access a list box from the database in which it was created, regardless of where you are storing the file. (This does not apply to list boxes accessed in TeleMagic dialog boxes such as in the Activity Manager and Sales Forecasting.)

### Global Directory

When storing list boxes in the global directory (the directory containing all of TeleMagic's files), any list boxes that you set up will be available to any other users who also have their list boxes set to the global directory; and you will be able to access any list boxes those users have set up. Note that with this setting, any of your contact databases that share the same structure will use the same list boxes for the same fields.

### Database Directory

With this option selected, any list boxes you set up will be accessible by you and any other users who have their list boxes set to the database directory. You will also be able to access any list boxes created by any other users using the database directory. List boxes will only be accessible, however, when you are in the contact database in which the list box was created.

> **Note**
>
> Be aware that with this option selected, any list boxes that you create for other areas of TeleMagic, such as the Activity Manager and Sales Forecasting, will only be accessible when you have the contact database open that you were in when the list box was created. (If you have no contact database open, the common directory will be used. The common directory contains files common to all databases and users, and is called \TM4\COMMON.)

### User Directory

If you want to create list boxes for your personal use, select the `User Directory` radio button. Any list boxes you create will only be accessible when you log in using your User ID. (You will not be able to share list boxes with other users when using this setting.)

## Toolbar Configuration

TeleMagic allows you to customize the toolbar that appears above the contact screen.

### Global Directory

If you want share a toolbar with other users, and use the same toolbar regardless of what database is currently open, select the `Global Directory` radio button. You will access the same toolbar as any other users who also have their toolbar configuration set to the global directory. The global directory is where TeleMagic is installed.

### Database Directory

If you use different tools depending on which database you currently have open, consider storing your toolbar configuration in the database directory. The toolbar that you set up for a database will be accessible from that database by yourself and any other users who have their toolbar configuration set to the database directory. Additionally, if any other users make changes to the toolbar for a database, you will see those changes when you open the database.

### User Directory

If you want to customize the toolbar for your personal use only, select the `User Directory` radio button. Your toolbar will be accessible from anywhere within TeleMagic whenever you log in using your User ID. (You will not be able to share the toolbar with other users.)

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Preferences)<<1} Directory Preferences

# The Preferences Dialog Box - Display Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Time Format

Select the `12 Hour` radio button if you want your time displayed in a 12 hour manner (e.g., 1:00p), using "a" for morning times and "p" for evening times.

Select the `24 Hour` radio button if you want your time displayed in military time (e.g., 1300).

### Decimal Point Symbol

American standard number display uses a period (.) to separate decimals. International displays vary. For example, German-speaking countries use a comma (,) to separate decimals.

Type your decimal preferences in the `Decimal Point Symbol` field. A sample number using your preferences will appear in the `Example` field.

### Separator Character

American standard number display uses a comma (,) to separate thousands. International displays vary. For example, German-speaking countries use a period (.) to separate thousands.

Enter your thousands separator preferences in the `Separator Character` field. A sample number using your preferences will appear in the `Example` field.

### Example

A sample of your time format based on existing selections is displayed in this field.

### Data Entry Bell

During high speed data entry, it can be helpful to have a data entry bell to warn you that you have filled a field and that the cursor has moved to the next field. To turn on the data entry bell, mark this checkbox. To turn off the data entry bell, unmark this checkbox.

### Force "Tab" Every Field

As you type data into a field, by default TeleMagic moves the cursor to the next field when the field is full. If you want to confirm by pressing TAB that entries are correct before moving to the next field, mark this checkbox. If you want to allow maximum data entry speed, unmark this checkbox.

### List Box on Date Fields

If you would like to be able to assign list boxes to fields that are set up to contain date information, mark this check box. If this is unmarked, pressing F2 in a date field will open the Go To Date dialog box instead.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Display_Preferences)<<1} Display Preferences

# The Preferences Dialog Box - Fax Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

## Tabs

Select the tab corresponding to the preference set you want to edit.

## Fax Local ID

In this field, type a name that will readily identify the origin of your faxes to others. The fax ID can be up to 20 characters in length, and can contain spaces and special characters.

This name is used as an identification tag which can be displayed by certain fax machines; for instance, those with an LCD. Not all receiving fax machines have the ability to read and display this ID, but for those that can the fax ID can be useful.

Consider putting your name, or department and company name, in the fax ID field. Each user in the system can set up a different fax ID.

## Configure Faxmodem(s)

When you click this button, the Faxmodem Configuration dialog box will open. Use this if you want TeleMagic Enterprise to search the computer on which you are working for faxmodems and configure them for faxing. (This is required if you want to use a local faxmodem.)

## Use Local Faxmodem

Mark this check box if you have a faxmodem installed locally and want to use it. If you do not mark this check box, TeleMagic will automatically assume you want to send all faxes to the fax queue from where they will be processed at the Automation Server.

> **Note**
> You must configure your faxmodem to send faxes locally. If you have not configured your modem, you will receive a pop-up message asking if you would like to configure your modem. If you select **Yes**, you will be taken to Faxmodem Configuration. If you select **No**, this check box will be unmarked.

## Modem Speaker On

Mark this check box if you want to hear the initialization and dialing sounds made by your faxmodem when you send a fax locally.

## Close Word Processor After Faxing

When you are sending a fax locally, TeleMagic Enterprise will open your word processor when processing the fax. If you would like to have TeleMagic close the word processor after completing the fax, mark this box.

**WARNING!**

If your word processor was open prior to sending the fax, TeleMagic will not prompt you to save your work before the word processor closes if you have this option selected. Always save your work before initiating the fax feature if you will be faxing locally and have selected this option.

## Use Dialer Prefix

In Dialer preferences, there is an option called `Dialer Prefix` where you enter the number you normally dial to get an outside line. In many cases, you will need to dial that number when making a phone call, but not when sending a fax. If you want TeleMagic to ignore this prefix when sending a fax, leave this check box unmarked. Mark this option if you want TeleMagic to use the prefix as entered in Dialer preferences.

**Note**

This option will only be available if you have `Use Local Faxmodem` selected. If you are sending faxes to a queue to be processed by the Automation Server, the server's setting for this option will be used instead of your preference setting.

**Note**

If you are not sure about this option, try leaving it blank initially. You can change it later if you have problems sending faxes.

## E-mail Notify

Mark this check box if you would like TeleMagic to send you an e-mail message after a fax has been successfully processed. The e-mail message will note the details of the fax.

## E-mail on Failure

Mark this check box if you would like to be notified by E-mail in the event of an unsuccessful fax.

## Create Activity

Mark this check box if you would like TeleMagic to create an activity with the type LetterFax and the status Completed in your Activity Manager. This will also cause the fax to be included in the Document History rollup for the contact.

**Note**

To avoid overloading your Activity Manager, activities created in a merge (either a mail merge or a fax merge), will not appear on your schedule; they will only appear in Browse view.

## Notepad Stamp

Mark this check box if you would like a "Sent fax" note stamped in the contact's notepad.

**Note**

The notepad stamping features will only be applicable if you have designated a memo field to be the Notepad in Key Fields.

## Monitor Fax (Local)

Mark this check box if you would like to have TeleMagic display the status of local faxes. (This is only available if you are faxing locally.)

### Notification (Local)

Mark this check box if you would like a pop-up to appear notifying you on successful completion of local faxes. (This is only available if you are faxing locally.)

### Stamp Comments

Mark this check box if you would like fax cover comments stamped into the contact’s notepad, the activity comments field in the Activity Manager, and/or the Fax Stamp field established in Key Fields, if that key field is a memo field.

### Stamp Documents

Mark this check box if you would like a list of the documents (path and file names) sent with the fax stamped in the contact’s notepad, the activity comments field in the Activity Manager, and/or the Fax Stamp field established in Key Fields, if that key field is a memo field.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Fax_Preferences)<<1} Fax Preferences

# The Faxmodem Configuration Dialog Box

### Device(s) Configured
All currently configured faxmodems are listed here.

### Auto Configure
If you would like to have TeleMagic configure your faxmodem automatically, click this button. There will be a pause (automatic configuration can take up to five minutes to perform) while TeleMagic checks your system for faxmodems. When completed, it will return a Fax Devices Detected dialog box, listing the faxmodems it found.

### Manually Configure
If you know the COM Port to which your faxmodem is attached, click this button. The Configure Modem dialog box will open, where you can specify the COM Port. This will result in quicker configuration time as TeleMagic will not have search your system for the faxmodem.

### Delete Modem
Click this button to remove the selected faxmodem from the list of configured devices.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½PREFS_Configure_Faxmodem_s)<<1}

# The Preferences Dialog Box - Wireless Messaging Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Pager ID

In this field, enter your pager PIN (Personal Identification Number).

### Pager #

In this field, enter the number TeleMagic needs to dial when sending you a wireless message (the carrier's phone number).

### Modem To Use

In this field, open the drop-down list and select the modem you will be using for wireless messaging.

### Baud Rate

In this field, open the drop-down list and select the baud rate your paging carrier can accommodate.

> **WARNING!**
> The baud rate information entered in Wireless Messaging Preferences is the baud rate which can be accepted by your paging carrier; not the baud rate at which your modem is capable of sending information. Paging carriers will generally accept information at a much lower rate than the modem is capable of sending. This field defaults to 300. Exercise caution before changing this setting.

### Packet Size

In this field, enter the maximum packet size your paging carrier will accommodate. (For more information on packet size, see the Setting Up Wireless Messaging topic .)

> **WARNING!**
> Be careful not to enter a packet size larger than your paging carrier will accommodate. If you do so, when you are sent messages, information may be lost.

### # of Retries

In this field, enter the number of times TeleMagic should attempt to send a page before declaring it failed.

### Notify On Completion

Mark this check box if you would like to be notified with a pop-up when a message is successfully sent.

### Paste Current Contact Info

Mark this check box if you want to have standard contact information (Company, Contact, and address key fields) from the associated contact record pasted into the message. In the Contact Manager, this will be information from the current record. In the Activity Manager, this will be information from the linked record. This information can be edited or deleted if necessary.

### Monitor Transmission

Mark this check box if you would like to be able to view a dialog box displaying the progress of the page transmission.

### Activity/ToDo - Paste Comments

Mark this check box if you want to have the contents of the activity or To-Do `Comments` field pasted into the message. This information can be edited or deleted if necessary.

### Notify on Failure

Mark this check box if you would like to be notified with a pop-up if a message fails to send after the specified number of retries. The message will include an error code indicating the reason for failure.

### Use Dialer Prefix

Mark this check box if you want TeleMagic to dial the `Dialer Prefix` entered in Dialer preferences when sending wireless messages.

### Modem Speaker On

Mark this check box if you want to hear the initialization and dialing noises made by the modem when sending a message.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Wireless_Messaging_Preferences)<<1} Wireless Messaging Preferences

# The Preferences Dialog Box - Writing Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Word Processors

Select all word processors you want to configure for this workstation from this list. To select a word processor, mark the associated checkbox.

### Command Line

Highlight the word processor you want to configure in the Word Processors list and type the complete path to the storage location of the executable file, and adjust the file name if necessary. If the word processor is OLE compliant, this can be automatically determined. If you do not know the path, and the word processor is not OLE compliant, use the Ellipsis button to locate the file using the Windows Open dialog box.

### Working Directory

Use this field to set a default directory which will contain your word processing documents. (The default can be edited for individual documents at the time a document is created.) This field will default to your TeleMagic user directory. Enter a different path if desired, or use the **Find…** button to select the path from a Windows Open dialog box.

### Include Current Date and Dear Field in Quick Letter Header

When adding a word processing document, you have the option of creating a quick letter. A quick letter will automatically place the standard address into the letter. If your standard address does not already contain the date and a salutation line, or if you have no standard address and are using key fields for the address instead, the `Include current date and Dear field in Quick Letter header` check box will allow you to include the date and the contents of the Dear field (if one exists) with the address information. (If your standard address already contains this information, leave this check box unmarked.)

> **Note**
> You must have a character field in the database named "Dear" to include the Dear field.

### Create Activity When Printing

Mark this check box to have an activity created for each merge document that is printed. This will also cause the merge to be included in the Document History rollup for the contact.

### Stamp Notepad on Merge

Mark this check box if you want to place a date, time, and file name stamp into the notepads of contacts included in a mail merge.

## More About

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Writing_Preferences)<<1} Writing Preferences

# The Preferences Dialog Box - Database Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Contact Level

TeleMagic allows you to have up to 3 contact levels for each database . You can name these levels to help you identify how each is used. (The names for the levels do not affect the operations of TeleMagic databases or the names of views created for those databases.)

Type a unique name for each level on its respective line in the `Level 1, 2 and 3` fields.

### Controlling level

In any database, there will probably be one level that you use more than the others. You are able to establish this level as your controlling level. The controlling level will be displayed by default when you open the database.

To set the controlling level, select the appropriate level from the drop-down list. (The levels will be represented by the contact level names, established above.)

### Standard Address (Lines 1-5)

You have the ability to set up a standard address expression (consisting of fields and, optionally, text and functions) for your contacts which will be copied to the Windows Clipboard when you press CTRL+P. Additionally, this address is used in Quick Letters and merged into the Standard Address directive used with the Windows Write and WordPad word processors.

To build your address, enter the expression you would like for each line of the address in the **Line one...** through **Line five...** fields. The expression could be as simple as the field containing a line of your address (e.g., contact1.company) or as complex as you would like to make it. (Click here for sample advanced standard address expressions.)   If you would like to use the TeleMagic Expression Builder to create the expression for each line, click the **Line one...** through **Line five...** buttons. (For information on using the Expression Builder, see the Expression Builder topic.)

> **Note**
> If you have established your address fields in Key Fields, you have the option of using your Key Field selections, or using the Standard address fields. The advantage of using the Standard address fields is that you will have access to the Expression Builder, which offers you further control over the address. If want to use your Key Fields selection, simply leave all of the Standard address fields blank. (If there is an entry in even one of these fields, TeleMagic will use this information as your standard address.)

## Currency Symbol

Currency fields are number fields that include a currency symbol to indicate that the data contained there represents a monetary amount. You can establish a default currency symbol for the database using the `Currency symbol` field. When you create a new currency field, this default symbol will be used, unless you specify otherwise.

> **Note**
>
> This setting provides a default for new fields being added. It will not change the symbol used for existing fields.

If you would like to specify a currency symbol other than the one provided, click or tab to the box and type in the symbol you would like. If you do not know how to type in a symbol, such as "¥" or "£", refer to the Hint in the Database Preferences: Currency Symbol topic.

## Insert at

This setting works with your selected currency symbol, allowing you to control whether it appears at the left or right of the data in the field. This will be the default for all new currency fields added. It can be edited for individual fields, if necessary.

## Sample

A sample of the default currency display, as formatted, is shown in this field.

## Lock record when dialed

`Lock record when dialed` is a safety feature which prevents users from dialing a contact or gaining edit access to a contact's record while another user is dialing and already talking to that same contact. When a user places a call to the contact, the record will be locked and remain so for the entire duration of the conversation.

If your users want to have exclusive rights to a record while they are talking to the contact, mark this field. With this box marked, other users will get a warning message if they attempt to change or dial to this record while a call is in progress. If you would like other users to continue to be able to work with a record while a call is in progress, unmark this check box.

## Apply security in activity lists

You may access a list of activities for the current contact from either the Activity List (accessed from the View Activities button on the Contact Manager Toolbar), or by adding an Activity Rollup list to your contact view. The Activity List includes the activity's due date, type, description, status and the User ID of the user who created it. Rollups will include whatever activity information you specify when the rollup is created.

By default, all activities linked to the contact will be displayed, whether or not the user viewing the list has been granted permission to view activity information for the user who created the activity. The `Apply Security in Activity Lists` check box allows you to apply security to the lists so that each user will only view information from the calendars of user who have granted them access.

If you want to have a complete list of activities linked to a contact, leave `Apply Security in Activity Lists` check box unmarked. If you want to respect users' security, mark this check box.

## Calculate upper levels on save

This option allows you to update calculated fields that use the ChildSum( ) and ChildCount( ) functions as records are edited.

Calculated fields that use ChildSum( ) and ChildCount( ) are based totals from the child level. These functions either count the child records belonging to a parent, or total the contents of a field across all of those child records. When a Level 2 or Level 3 record is edited, that edit could change the calculation results from an upper-level child sum or child count. Selecting this preference gives you the option of searching the upper level for a calculation using one of these functions and recalculating it when you edit a child record. The advantage to this is that your upper level calculations will always accurately reflect the current data in the child records. Be aware, however, that in order to perform this recalculation, TeleMagic must analyze every child record belonging to the same parent as the current record. In some databases, this could be thousands of records, potentially resulting in a significant delay every time a Level 2 or Level 3 record is edited. You may want to consider performing a test with this option marked to determine if this is an issue in your database.

## Calculate Lower Level on Save

This option forces a recalculation, when the parent record is saved, of any calculated fields in lower level records which are based on fields in parent levels. Normally, this recalculation is performed only when the child record is opened for editing, or a Recalc is performed. This affects any subordinate records of the parent. For example, if there are calculated fields based on a level 1 field in both level 2 and level 3, both level 2 and level 3 calculated fields will be recalculated.

> **Warning!** Using this option can significantly affect the time required to save upper-level records.

## Save Merged Files

Mark this checkbox to create a file of each merge document produced. The new file will be named using the name of the source document plus an incrementing number. The original file name will be truncated as required to accommodate the incrementing part of the new file name. These files will be accessible from the record they were created for.

> **Warning!** Use this option with caution. It can result in large numbers of files being generated and stored.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Database_Preferences)<<1} Database Preferences

## Sample Standard Address Expressions

**Note**

The fields contained in the sample expressions below are provided for example purposes. If you want to use these expressions, substitute the appropriate fields from your database.

**Sample 1**

This sample will create a standard address using the address fields on Level 1.

**Line One:** **dtoc(date()) replicate(chr(13),3)**

*This will enter the current date then return three times.*

**Line Two:** **contact1.com iif(empty(contact2.contact),' ',chr(13) contact2.contact)**

*This will enter the company name, then the contact name from Level 2, provided there is a linked contact record containing data in the name field.*

**Line Three:** **contact1.ad1 iif(empty(contact1.ad2),' ',chr(13) contact1.ad2)**

*This will enter the first address line. If there is data in the second address line, it will return once and enter that data.*

**Line Four:** **rtrim(contact1.cit) ', ' rtrim(contact1.sta)+ ' ' contact1.zip**

*This will enter the city with a comma followed by a space, the state followed by two spaces, and the ZIP code. Any blank spaces at the end of the city and state fields will be trimmed.*

**Line Five:** **replicate(chr(13),2) 'Dear ' iif(empty(contact2.contact),rtrim(contact1.com),rtrim(contact2.contact)) ':'**

*This will return twice then enter the word "Dear" followed by the contact name if there is one, or the company name if there is not, followed by a colon.*

**Sample 2**

This example is designed for databases with address fields on more than one level. It will use the address fields from the current level.

**Line One:** **dtoc(date()) replicate(chr(13),3)**

*This will enter the current date then return three times.*

**Line Two:** **contact1.com iif(ccurlevel='1',' ',chr(13) contact2.contact)**

*If Level 1 is the current level, it will enter the company. If Level 2 is the current level, it will enter the company, then enter the contact on the next line.*

**Line Three:** **iif(ccurlevel='1',contact1.ad1 iif(empty(contact1.ad2),' ',chr(13) contact1.ad2),contact2.conad1 iif(empty(contact2.conad2),' ',chr(13) contact2.conad2))**

*This will enter the Address Line 1 and 2 fields from the current level. If there is no data in the Address Line 2 field, it will be skipped.*

**Line Four:** **iif(ccurlevel='1',rtrim(contact1.cit) ', ' rtrim(contact1.sta) ' ' contact1.zip,rtrim(contact2.concity) ', ' rtrim(contact2.const) ' ' contact2.conzip)**

*This will enter the city with a comma followed by a space, the state followed by two spaces, and the ZIP code for the current level. Any blank spaces at the end of the city and state fields will be trimmed.*

**Line Five:** **replicate(chr(13),2) 'Dear ' iif(ccurlevel='1',rtrim(contact1.com) ':',rtrim(contact2.contact) ':')**

*This will return twice then enter the word "Dear" followed by the company and a colon on Level 1 or the Contact and a colon on Level 2.*

**Sample 3**

This sample is based on the Documentation database. In that database, Level 1 contains address fields, Level 2 contains the contact name and title, and Level 3 contains contract information. The following example will create a standard address that takes into account the current level.

**Line One:** **dtoc(date()) replicate(chr(13),3)**

*This will enter the current date then return three times.*

**Line Two:** **contact1.company iif(ccurlevel='1',' ',chr(13) contact2.contact iif(empty(contact2.contitle),' ',chr(13) contact2.contitle))**

*If the current level is Level 1, this will enter the company . If it is Level 2 or 3, it will enter the company, then return and enter the contact, then return and enter the contact's title, provided there is data in the Contact Title field.*

**Line Three:** **contact1.add1 iif(empty(contact1.add2),' ',chr(13) contact1.add2)**

*This will enter the first address line. If there is data in the second address line, it will place that data on the next line.*

**Line Four:** **rtrim(contact1.city) ',   ' rtrim(contact1.state) '    ' contact1.zip**

*This will enter the city with a comma followed by a space, the state followed by two spaces, and the ZIP code. Any blank spaces at the end of the city and state fields will be trimmed.*

**Line Five:** **replicate(chr(13),2) 'Dear ' iif(ccurlevel='1',rtrim(contact1.company) ':',iif(ccurlevel="2",rtrim(contact2.contact) ':',rtrim(contact2.contact) ':' replicate(chr(13),2) 'RE:   ' contact3.conno))**

*This will return twice then enter the word "Dear". If it is Level 1, it will enter the company name with a colon. If it is Level 2, it will enter the contact name with a colon. If it is Level 3, it will enter the contact name with a colon, then return twice and enter the word "RE:", then enter the Level 3 contract number.*

# The Key Fields Preferences Dialog Box

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Key Fields for: (Level 1 / Level 2 / Level 3)

Select the radio button for the database level for which you would like to assign Key Fields.

### Company and Contact related Key Fields

Open the drop-down list and select the database field that contains the information referenced in each of these Key Fields.

### Notepad

The notepad in TeleMagic is a special memo field that is used to track contact information. For example, calls placed through the dialer, letters sent through word processing, and faxes sent to a contact are all logged in the notepad. The Notepad drop-down list will only contain the memo fields in the database (other field types will not be listed). The memo field does not have to be displayed on any contact screen, but it must exist in the database in order to be selected as a Key Field. If there are no memo fields in the database, and you want to establish a Notepad for your records, see the Database Management Creating and Defining Fields topic for instructions on adding a memo field.

> **Note**
>
> If you have upgraded from a version of TeleMagic prior to V4.0, this Notepad Key Field replaces the previous method of requiring that the notepad memo field be named Notepad. If there is a field named Notepad already existing a database the first time it is opened after installing or upgrading to V4, the key field will default to this memo field. If you want to use the field named Notepad as your Notepad key field, you do not need to edit this setting. If you want to use a different field, or if there was no previously existing Notepad field, you will have to select a memo field from Key Fields.

### Address, City, State, Zip, and Country

Open the drop-down list and select the database field that contains the information referenced in each of these Key Fields.

### Primary Phone, Phone 2, Phone 3

These fields are used with the Dialer feature to allow you to make outgoing calls to your contacts. See the topic Dialing Outgoing Calls for more information on using the Dialer.

### E-Mail Address

Open the drop-down list and select the database field that contains the information referenced in each of this Key Field.

## Pager # and Pager ID

These fields are used with the Wireless Messaging feature to allow you to send messages to your contacts. You must first create the fields to contain the information then select those fields from the drop-down lists. See the topic Adding Wireless Messaging Fields to Your Database for more information.

## Fax #

This field is used with the Faxing feature to automate faxing your contacts. For more information on faxing, see Using the Fax Feature .

## Fax Stamp

The Fax Stamp Key Field is used to record information on the contact record concerning faxes to each contact. The type of field you select as your key field will determine what information is stamped in it.

If a fax is successfully sent, the following field types will be stamped according to these guidelines:

A memo field will be stamped with all details regarding the fax: the date and time it was sent, who sent it, the subject, and optionally the document(s) sent and any cover comments.

> **Note**
>
> When sending a fax, you have the option of stamping your Notepad Key Field with this same information. If you select to stamp the Notepad, and have a different memo field selected as your Fax Stamp Key Field, both memo fields will be stamped. If you select the same memo field for your Notepad and Fax Stamp and select to stamp the Notepad, the stamp will be duplicated. If you are using a memo field for your Fax Stamp, it is not recommended that you also stamp the Notepad when faxing.

A date field will be stamped with the date when the most recent fax was sent. (Each new entry will replace any previous entry in this field.)

A character field will be stamped with the date and the time the most recent fax was sent, the User ID of the sender, and as much of the fax's subject as will fit in the field. (Depending on the length of your character field, the fax subject may be partially truncated.) Each new entry will replace any previous entry in this field.

A numeric field will increment by 1 for each fax to a contact, indicating how many faxes have been sent to that contact.

A logical field (checkbox) will be turned on (or marked). This is useful if you are faxing to a filter and would like an easy way to reference which contacts received the fax.

> **Note**
>
> It is recommended that you perform a search and replace to unmark this field prior to faxing, as any logical fields previously turned on will not be unmarked for failed faxes. See the Group Replace topic.

An additional feature of the Fax Stamp field allows you to track failed faxes sent from the Automation Server if you have selected a character field for your Fax Stamp Key Field. When a queued fax fails, an X will be placed in the field, followed by the date of the fax, the percent of completion the fax reached before failing, and the number of pages that were successfully completed over the total number of pages. (For example, X 11/19/99 75 3/4 would indicate the fax sent to the contact on November 19, 1999 was 75% complete, with three out of four total pages successfully sent, prior to failing.)   This stamp is only used with faxes sent through the Fax Server.

**Hint**

You can create a filter that searches for an X as the first character in the field selected as your Fax Stamp Key Field to quickly view or report on contacts with failed faxes. See the Creating Filters topic for more information on creating filters.

## Default Page

Setting a default page allows you to have a particular page open automatically whenever you scroll to a record. While you can set a default page in Contact preferences that will open automatically when you open the database level, this assumes that you will want to view the same page for all records. This may not always be the case. For example, you may want to open the record of a sales lead to a page containing information on the status of the sale, but want to open the record for an existing customer to their account status page.

You can create a field to contain the names of the pages on the current level, then select that field as your Controlling Page Key Field. If you would like a particular record to open automatically to a certain page whenever it is accessed, enter the name of that page in the field. When the record is opened, TeleMagic will read the contents of that field and open the appropriate page. (It is highly recommended that you place a validated list box on the selected field containing the names of the pages on the level.)

Before accessing Key Fields, you should create the field you will be using to contain the controlling page information. (See the Creating and Defining Fields topic for more information.)

## Record Descriptor

The record descriptor is used throughout TeleMagic to identify a record. For example, the title bar of the contact screen contains the record descriptor for the current record. The record descriptor should allow you to readily identify the record. It may be the contact's name, a product code, an invoice number, etc. A default record descriptor has been provided which uses your Company and Contact key fields. If you want to change this, you can create an expression to specify the information you would like to include in the descriptor. (For example, in the Documentation database, the expression: **"Contract Number " contact3.conno "   For " contact2.contact** could be used on Level 3 to include the contract number and contact name in the descriptor.)   Click the **Record Descriptor** button to open the Expression Builder, where you can create an expression to define each record on the level. (For information on using the Expression Builder, see the Expression Builder topic.)

**Note**

Do not confuse a contact with a record. Although many databases are designed to primarily contain contact information, a TeleMagic database can contain anything you like. The record descriptor is used whenever the record as a whole is being referenced. In some areas of TeleMagic, on the other hand, you will be referencing a contact directly. For example, when you place a phone call, it is assumed you are calling a person, not the record. In these cases, the Contact and/or Company Key Fields will be provided instead of the descriptor. In areas that deal with a person, if both the company and contact are defined, TeleMagic will show Contact at Company. If only one of these fields is defined, that information will be provided. If neither is defined, the record descriptor will be given.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences

# The Function Keys Preferences Dialog Box

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

## Tabs

Select the tab corresponding to the preference set you want to edit.

## The following function keys are assigned

This text box contains all of the function keys that are available. This list can be stored in the global, database, or user directory; depending on where it is being stored the list of available function keys may vary. (See Directory Preferences for more information.)

## Add / Remove / Copy

Clicking these buttons allows you to create and manage your function keys. For more information about using them, see the topic Function Key Setup.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Function_Key_Setup)<<1} Function Key Setup

# Properties Dialog Box

## Key Assignment

Every function key must be assigned a keystroke that will launch the function key. When you add a new function key, the Select Function Key to Add dialog box will automatically open where you can select from the available key combinations. Your selection will be displayed in this field. Clicking in this field when editing an existing function key will launch the Change Function Key Assignment dialog box where you can adjust your setting.

## Description

This field contains the description of the function key. Try to put enough information in the description so its operation will be understandable.

## Literal / Expression

There are two types of function keys that you can create: literal based or expression based.

Literal function keys are used when your function key only contains keystrokes. For example, if you wanted to create a function key that will open the Notebook and go to a record with the Note ID SAM, you would create the following literal function key:

G{ALT+N}GSAM{ALT+O}

Select the `Literal` radio button and type the keystrokes needed for the function key in the text box. If you must hold down two keys simultaneously, place them in braces separated with a plus sign. For example: {CTRL+HOME}.

Expression function keys are used when your function key contains TeleMagic variables and functions. If, for example, you wanted to open the Notebook and go to a record with the current user's User ID in the Note ID, you would require a variable to analyze the current User ID. This will require an expression instead of a literal. For example:

"G"+"{ALT+N}"+"G"+cUserID+"{ALT+O}"

To create a function key that uses an expression, select the `Expression` radio button. The Expression Builder will open. (If you want to edit an expression later, use the **Expression** button to launch the Expression Builder.) Your expression will display in the text field.

**Note**
Remember when entering keystrokes in an expression, they must be surrounded by quotes. Do not use quotes in a literal unless they are part of the text.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Function_Key_Setup)<<1} Function Key Setup

# The Preferences Dialog Box - System Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### System ID

The System ID is how TeleMagic tracks the source of a record in synchronization. It is generated automatically upon installation, and normally does not need modification. When setting up TeleMagic for synchronization with another installation, a Site ID is created that should correspond to this System ID. If a different Site ID is selected, this System ID will be changed by Data Synchronization Server to match that Site ID. Once Data Synchronization Server is installed, this option will not be accessible.

### Default Pager #

If all or most users in your system use the same paging carrier, you can enter a carrier phone number which will be offered as a default when a user sets up Wireless Messaging. Having this default established can save time and repetition in data entry. It can be edited on an individual basis for any users who have a different carrier number.

### Date Format

To select the date format that will be used by all users of TeleMagic, use the `Date Format` drop-down list. MM, DD, and YY stand respectively for numeric Month, numeric Day, and numeric Year. Once Data Synchronization Server is installed, this option will not be accessible. Changes to your date format are made directly in Data Synchronization Server.

### Display Century on Dates

To display all four digits of the year in date formats, leave this check box marked. (This is highly recommended.)

### Century Rollover

Enter the one or two-digit number to be used to indicate the lowest number year to be considered as a date in the twentieth century, when the year is entered as a two-digit number. For example, if you enter "95" in this field and a user enters "95" in a date field, the year will be stored as "1995". However, with the same setting, if a user entered "94", that entry would be stored as "2094". If you have any number besides "0" in this field, and you need to enter a date in the twentieth century that occurred before the century rollover, you must enter the date as a four-digit number.

### Downtime

You can enter a beginning and ending downtime in these fields. No users will be able to log into TeleMagic during this time period. Any users already in the program will be given a 5 minute, then a 1 minute warning that they must exit TeleMagic. It is recommended that you set a downtime during your regularly scheduled rebuild and backup to avoid problems with users in the system when files are being accessed.

## Disable Login

This check box forces all other users out of TeleMagic. This can be used if you need to perform system maintenance, such as rebuild. When this is marked, no other users will be able to log into TeleMagic. Users currently in the program will receive a 5 minute, then a 1 minute warning that they must exit TeleMagic. Any users (with the exception of the user who selected this option) still in TeleMagic at the end of the 5 minutes will be automatically exited from the program. Login will be disabled until the user who marked this check box unmarks it.

**Note**

If the user who initiated the disabled login exits TeleMagic while this is activated, he or she can log back in with the User ID that was in use at the time this was selected. No other User ID will be accepted. The user *must* log in by launching TeleMagic with the /U=***UserID*** command line parameter.

## Master Password

This button will open the Master Password dialog box which allows you to set the master password. When a user enters the master password they will have unrestricted access to all areas of the Automation Server.

## Options Password

This button will open the Options Password dialog box which allows you to set the options password. When using this option, users will be prompted to enter the password whenever they try to enter another area of the Automation Server.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_System_Preferences)<<1} System Preferences

# The Preferences Dialog Box - Toolbar Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### Configure Tools For

Select the toolbar you want to configure from the drop-down list. There are three toolbars in TeleMagic; one System toolbar, and two Contact Manager toolbars.

### Available Toolbar Options

Highlight the tool you want to add to the selected toolbar from this list. If you choose to add a User-defined button, you will need to create a bitmap to serve as the button's face. The bitmap can be produced using any bitmap editor. It can be no larger than 19X17 pixels, and it must be stored as \TM4\TOOLS*filename*.BMP.

### Add / Remove / Remove All

Use these buttons to move tools onto and off of the selected toolbar.

### Edit

Click this button to open the Edit User Defined Tool dialog box. This button is only available if you have selected a user-defined tool which has already been assigned to the toolbar.

### Default

Click this button to restore the default tools to the selected toolbar.

### Selected Options

Tools which have been added to the are listed in this field. Drag the mover buttons to change the order that the tools appear on the toolbar. To remove a tool, highlight it and click **Remove**.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Toolbar_Configuration)<<1} Toolbar Configuration

# The Preferences Dialog Box - Users Page

The Preferences dialog box contains most preference settings for TeleMagic. It does not include preferences for TeleMagic Internet Mail. The title bar of the dialog box indicates the selected preference page and the category of preferences found on that page, User, Database, or Global. If the preference set is User, the user's name will appear. If the preference set is database, the database name will appear. When the preference set is Global, the title bar will indicate *Preference Set Name* for TeleMagic.

### Tabs

Select the tab corresponding to the preference set you want to edit.

### The following users are installed

This is a list of all users in this TeleMagic installation.

### Add / Remove / Copy

Click any of these buttons to add a new user or work with the highlighted user in the user list.

### Properties

Click this button to open the Properties dialog box.

### Details

The selected user's Pager ID, Pager #, and E-mail address is displayed in this area.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Preferences)<<1} User Preferences

# User Properties Dialog Box

### User ID

When adding a user, enter new the User ID in this field. When editing an existing user, this will be display only.

### Name

Enter or edit the name of the user.

### Pager ID

Enter or edit the Pager ID that TeleMagic should use when sending Wireless Messages to the current user.

### Pager #

Enter or edit the carrier terminal number that TeleMagic should use when sending Wireless Messages to the current user.

### E-mail Address

Enter the user’s e-mail address in this field. If this field contains an e-mail address, the user will appear in the Internet address book in TeleMagic Internet Mail.

### Change Password

Click this button to open the change password dialog box, where you can add or modify a password for this user.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Preferences)<<1} User Preferences

# The Activity Dialog Box - Activity Page

## Tabs

Click the tab associated with the scheduling feature you want to access.

## Description

Enter a description for the activity here. If this activity is linked to a contact record, and you have the `Default Description to Record Descriptor when linking` option marked in Activity preferences, this field will contain the descriptor from the linked contact record if the activity is linked.

## Date

This is the date that this activity is due.

## Time

This is the time that this activity is due.

## Duration

This is how long the activity will last. The default is set in Activity preferences.

## Direction (In / Out)

These radio buttons can be used any way you like to further classify the activity.

## Hide this activity

Mark this checkbox to display the activity only in the Browse view. This affects the user who owns the activity as well as any users who have access to this users calendar.

## Type

This is the activity type. Consider using the list box on the field to classify the types of activities you use. There are two pre-defined activity types in the list box for reporting purposes: Call and Meeting. Any activities automatically generated by phone calling will have the Call type.

## Status

This is the activity's status. Completed activities have a status of Completed.

## Priority

Open the drop-down list and select a priority level for this activity. The priority can be used as a filter in some activity reports.

## Alarm / Lead Time

Mark this check box to activate the alarm feature. The lead time lets you specify how long before the activity is due the alarm should go off.

## Completed (Date / Time)

If this activity has been completed, mark this check box. This will activate the `Completion Date` and `Time` fields. By default, these fields will contain the date and time when the check box was marked. Change them to any date or time you desire.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# Activity Dialog Box - Link Page

### Tabs
Click the tab associated with the scheduling feature you want to access.

### Contact Info
If the activity is linked to a contact, key field information for that contact will be displayed in this field

### Link to (No Link / Current Contact / Other Contact)
If you do not want to link this activity to a contact record, select the `No Link` radio button.

If you want to link this activity to the current contact, select the `Current Contact` radio button.

If you want to link this activity to any other contact record, select the `Other Contact` radio button.

### Search My Contacts For
This field becomes available when the Other Contact radio button is selected. Enter the information to be searched for and click **Search**. This will search the current database only.

### Advanced Search
This button becomes available when the Other Contact radio button is selected. Click this button to open the Advanced Search dialog box and search for a contact in another database.

### Browse Contacts
This button becomes available when the Other Contact radio button is selected. Click this button to open a browse window of the current database. Click on the desired record to link the sales forecast to that record.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# Activity Dialog Box - Comments Page

### Tabs
Click the tab associated with the scheduling feature you want to access.

### Comments / Stamp / Paste Contact info
Enter any comments you want associated with this activity into the `Comments` text box. If you want to stamp the current date, time, and your User ID into your comments, click the **Stamp** button. If you want to add the key field information from the linked contact record, click the **Paste Contact Info** button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# Activity Dialog Box - Assignment Page

## Tabs
Click the tab associated with the scheduling feature you want to access.

## Assign to a single User
Select this radio button if only one user is to be assigned the activity. Select the user from the drop-down list.

## Assign to multiple users or groups
Select this radio button to assign the activity to more than one individual user, a user group, more than one user group, or some combination of individuals and user groups.

## Tree view of available users and groups
Click on the plus signs to open the tree view and display members of the available groups. Mark the check boxes to select the users and groups to whom the activity is to be assigned.

## Page
If this activity is assigned to a user who is able to accept wireless messaging, this check box will be available. If it is available, mark this check box to send a wireless message to the user informing him or her of the activity assignment.

## Notify
Mark this check box to send a pop-up message to this user to notify him or her of the assigned activity.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

## Activity Dialog Box - Resources Page

### Tabs

Click the tab associated with the scheduling feature you want to access.

### Available Resources

Mark the checkbox(es) associated with the resource(s) to be assigned to the activity.

### Select All

Click this button to assign all resources to the activity.

### Select None

Click this button to deselect all resources.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointmen
ts_and_Meetings)<<1}

# The Activity Dialog Box - Availability Page

## Tabs
Click the tab associated with the scheduling feature you want to access.

## Between Dates
Enter the range of dates during which the activity should occur. The dates can be entered in their respective fields directly, or you can click on the Date Picker icons and select the dates from the calendar.

## Between Times
Enter the range of times during which the activity should occur. You can either enter the times directly in the fields, or click on the Time Picker icons and use the Select Time dialog box. The times selected are for each day selected in the Between Dates section of this page. For example, if you chose the first through the fifth of the month in Between Dates, and 1:00p through 5:00p in Between Times, TeleMagic will find free time slots for the selected users and resources for the afternoons of each of the first five days of the month, but not the mornings.

## Report On Drop-Down List
Select the combination of users and resources for which you want to find available time slots. The following choices are available:

- All Users and Resources
- All Users Only
- All Resources Only
- Selected Users and Resources
- Selected Users Only
- Selected Resources Only

## View only available time slots
Mark this checkbox to restrict the report to time slots that do not have activities scheduled.

## Search
Click this button when you are ready to begin searching for available time slots.

## Results
The results of the search will be displayed in this field. The user and resource names will be in a column on the left, the time slots will appear to the right.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# Activity Dialog Box - Recurring Page

## Tabs
Click the tab associated with the scheduling feature you want to access.

## Frequency
Select how often the activity will recur from the list. The exact choices available will depend on the first day that the activity is scheduled. For example, if the first time the activity occurs is on the first Friday of the month, some of the choices available will be Every Friday, The First Friday of the Month, and Every Other Friday. In addition, there are choices for the activity to recur on specific dates each month, on alternate months, or on annual schedules.

## Duration
Select how long the activity will recur from the drop-down list. The list includes periods up to two years. If the list does not include the desired duration, select User Defined and enter the date after which the activity should not recur in the date field of this section.

## Conflict Resolution
Use these radio buttons to choose how you want to handle conflict: i.e., what you want TeleMagic to do if the recurring activity conflicts with another activity already scheduled, or the activity occurs on a weekend or holiday.

## Rescheduling Action when the Conflict is with Another Activity:

**Schedule regardless of conflict**
Always schedule this activity.

**Skip this activity when conflicting**
Never schedule this activity if there is a conflict.

**Schedule before conflicting activity**
Reschedule this activity for the closest working day prior to the day of the conflict.

**Schedule after conflicting activity**
Reschedule this activity for the next working day after the day of the conflict.

## Rescheduling Action when the Conflict is with a Weekend or Holiday:

**Schedule on weekends and holidays**
Select this radio button to allow this recurring activity to be scheduled on weekend days or holidays.

**Skip weekends and holidays**
Select this radio button to not allow this recurring activity to be scheduled on weekend days or holidays.

**Slide weekend or holiday activities to nearest weekday**

Select this radio button if the recurring activity you are scheduling might sometimes fall on a weekend day. Checking this box ensures that the activity will be scheduled for weekdays only.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# The To-Do Dialog Box - To-Do Page

### Tabs
Click the tab associated with the scheduling feature you want to access.

### Description
Enter a description for the To-Do here.

### Date
This is the date that this To-Do is due.

### Direction (In / Out)
These are user-defined radio buttons that can be used to further classify your To-Do.

### Type
This is the To-Do type. Consider adding a list box to the field to classify the types of To-Dos you use.

### Status
This is the To-Do's status. Completed To-Dos have a status of Completed.

### Priority
Open the drop-down list and select a priority level for this To-Do. To-Dos will be listed on the calendar page in the order of their priority.

### Complete (Date)
If this To-Do has been completed, mark this check box. This will activate the `Completion Date` field. By default, this field will contain the date when the check box was marked. Change them to any date you desire. Completed To-Do items will only appear on this due date.

### Show only when due
If you want this To-Do to only appear on the To-Do list on the day it is due and later, mark this check box. If this check box is not marked, this To-Do will appear on the To-Do list every day prior to when it is actually due.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Adding_To_Dos)<<1}

# To-Do Dialog Box - Link Page

## Tabs

Click the tab associated with the scheduling feature you want to access.

## Contact Info

If the To-Do is linked to a contact, key field information for that contact will be displayed in this field

## Link to (No Link / Current Contact / Other Contact)

Select the radio button to determine whether the To-Do is linked to a contact:

If you do not want to link this To-Do to a contact record, select the `No Link` radio button.

If you want to link this To-Do to the current contact, select the `Current Contact` radio button.

If you want to link this To-Do to any other contact record, select the `Other Contact` radio button.

## Search My Contacts For

This field becomes available when the Other Contact radio button is selected. Enter the information to be searched for and click **Search**. This will search the current database only.

## Advanced Search

This button becomes available when the Other Contact radio button is selected. Click this button to open the Advanced Search dialog box and search for a contact in another database.

## Browse Contacts

This button becomes available when the Other Contact radio button is selected. Click this button to open a browse window of the current database. Click on the desired record to link the sales forecast to that record.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Adding_To_Dos)<<1}

# To-Do Dialog Box - Comments Page

### Tabs

Click the tab associated with the scheduling feature you want to access.

### Comments / Stamp / Paste Contact info

Enter any comments you want associated with this activity into the `Comments` text box. If you want to stamp the current date, time, and your User ID into your comments, click the **Stamp** button. If you want to add the key field information from the linked contact record, click the **Paste Contact Info** button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Adding_To_Dos)<<1}

# To-Do Dialog Box - Assignment Page

### Tabs
Click the tab associated with the scheduling feature you want to access.

### Assign to a single User
Select this radio button if only one user is to be assigned the To-Do. Select the user from the drop-down list.

### Assign to multiple users or groups
Select this radio button to assign the To-Do to more than one individual user, a user group, more than one user group, or some combination of individuals and user groups.

### Page Users
Mark this checkbox to page users to whom this To-Do has been assigned. This checkbox becomes available when you assign the To-Do to multiple users or groups.

### Notify Users
Mark this checkbox to send pop-up notification of the To-Do to users to whom the To-Do was assigned. This checkbox becomes available when you assign the To-Do to multiple users or groups.

### Tree view of available users and groups
Click on the plus signs to open the tree view and display members of the available groups. Mark the check boxes to select the users and groups to whom the To-Do is to be assigned.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Adding_To_Dos)<<1}

## The Copy Resource Dialog Box

### Copy resource (resource name) to

Enter the new name for the copied resource.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLP>secondï¿½CALEND1_Resource_Management)<<1} Resource Management

# The (calendar view) Report of Priority (priority choices) Dialog Box

This dialog box is used for the Day at a Time, Week at a Time, and Month at a Time Reports. The title of this dialog box will depend on the menu item that you selected to open it. The title will change if you make certain choices.

### Report Format

The radio button will be set to the type of report that you want, based on the menu item you used to open this dialog box. To change to a different report, select the appropriate radio button.

### Include (Activities / To-Do's / Due / Completed)

Use these check boxes to filter the information included in the report. Mark a check box to include the item; unmark it to exclude it from the report.

### Date range (From / To)

Enter the beginning and ending dates for the range on which you want to report.

### Time range (From / To)

Enter the beginning and ending times for the range on which you want to report.

### Priority

Mark the appropriate check boxes for the priorities on which you want to report. You must select at least one.

### User

If any other users have granted you access to their calendars, open the drop-down list and select the user on whom you want to report. This list will only contain users who have granted you activity permissions.

### Resolution

This report resembles a calendar page when printed. In the Day at a Time and Week at a Time reports, you can control how much time is represented in each time block shown on the report. The default is your `Show Time in Blocks of` setting in Activity Preferences.

### Type

Use this to filter the report by type. Enter the activity and To-Do type you would like included in your report, or press F2 to access any list box you have attached to the `Type:` field in the Activity dialog box.. Only those activities and To-Dos of that type will be included in the report. (This option is not case sensitive.) Leave this blank to include all types.

### Extended Activities (Global / Personal)

If you would like to include extended activities in your report, mark the `Global` and/or `Personal` check box to select the type of extended activities you would like. If you unmark both check boxes, no extended activities will be included.

### Detail Page

This feature is only available when running a Month at a Time report. Mark this check box to include the activity and To-Do details.

### View

Click this button to preview your report.

### Print

Click this button to print your report.

### Fax

Click this button to create a fax document of your report. This fax document can then be included in any fax that you send.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT1_Activity_Schedule_Reports)<<1}

# The Rejected Assignments Dialog Box

### Type
This column will display a code indicating the type of activity that was rejected. (S) indicates a user single activity; (G) indicates a group activity; and (M) indicates a group activity rejected by the owner. This will occur if ownership of the activity was assigned to another user by selecting that user in the `Assigned To` field for the group activity.

### Date
This is the due date of the assigned activity.

### Time
This is the due time of the assigned activity.

### To
This is the person who has rejected the assigned activity.

### Description
This is the description of the assigned activity.

### Edit
Click this button to change the details of the assigned activity. This can be used to reassign the activity to yourself or another user. (If the Activity Manager is open when you access the Rejected Assignment dialog box and you reassign the activity to yourself, it will not appear on your calendar until the Activity Manager refreshes itself.)

### View Comment
Click this button to open the Activity Comment dialog box where you can read any comments associated with this activity.

> **Hint**
> If you want to add to or edit the comments, you must click **Edit** and open the activity to do so.

### Return
Click this button to send the rejected activity back to the user who rejected it.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Acknowledging_Accepting_and_Rejecting_Assig
nments)<<1}

# The Activity Comment Dialog Box

## Comments Text

These are the comments associated with the current rejected activity. To add to or edit the comments, return to the Rejected Assignments dialog box and click **Edit**. You will not be able to edit group activities.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Acknowledging_Accepting_and_Rejecting_Assignments)<<1}

# The Multiple Alarms Dialog Box

### Off
If you would like to turn off the alarm for an activity, click on it. A check mark will appear in this column, the alarm is off. To turn the alarm back on, double-click the activity if it is highlighted, or click once if it is not.

### Date
This is the activity’s due date.

### Time
This is the activity’s due time.

### Description
This is the activity’s description.

### Turn off all
Click this button to turn off the alarm for all activities on the list. A check mark will appear beside each activity.

### Snooze all
If you do not want to deal with the activities at the current time, you can click this button to put all of the alarms into snooze mode. You will be reminded of the activity again during the next alarm sweep, based on the `New Alarm/Snooze Interval` Activity preference setting.

### Go to selected activity when done
Mark this check box to tell TeleMagic that when you finish working in this dialog box, you want to go to the highlighted activity.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1}

# The View Record Expression Dialog Box

In this dialog box you can build a filter that will specify what records the group members will be able to view.

> **Example:** You might want a group to be able to view only the records for California companies in a database.

If you do not create a filter in this dialog box, the group will be able to view all records.

## Field

Select the field you want to use to select records. For example, to limit the group to only viewing records in California, you would select the State field.

## Compares

Select the appropriate comparison. This is how the data in the field should compare to the filter criterion you establish. In the above example, the data in the State field should equal California.

## To

Type the information you will use to select records. Using the above example, you would type California.

## AND/OR

If you are creating a filter with more than one criterion, tab to the And/Or field and type A for AND or O for OR. AND means that both the preceding and the following criterion must be true; OR means that either the preceding or the following criterion should be true.

**Examples:**

"Account Rep Equal JRC AND State Equal CA" will create a filter which pulls all of the records in California whose account rep is JRC.

"Account Rep Equal JRC OR State Equal CA" will create a filter which pulls all of the records whose account rep is JRC, as well as all the records in California.

## Advanced

Click this to create a more complex expression using the standard TeleMagic Expression Builder.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SECURITY_To_Add_Database_Security_and_Visibility_Rules_to_a_Security_Group)<<1}

# The Contact Manager Browse View

Browse view allows you to view records in a tabular format.

While in browse mode, you can rearrange the order of fields so that two fields can be examined side-by-side by clicking and dragging the field.

Change the size of columns by holding the cursor over the border between the headers of two columns. When the cursor becomes a double-headed arrow, click and drag the border to the desired position.

You can split the window into two partitions by clicking in the lower left corner and dragging a partition window open.

Edit the data in any field by highlighting the field and pressing the SPACEBAR. Open a Contact Manager view of a record by highlighting a record and either double-clicking, clicking **Select**, or pressing ENTER.

## Save Settings

Click this button to retain any changes you made to the order in which the fields appear, or their size.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager_Layout)<<1} Contact Manager Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Access_Browse_View_Method_1)<<1} To Access Browse View, Method 1:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_To_Access_Browse_View_Method_2)<<1} To Access Browse View, Method 2:

# The Pending Activity List

This is a browse list of all incomplete activities.

If the highlighted activity is not linked to a contact record, there will be a message at the top of the dialog box to inform you of that fact.

If the highlighted activity is linked to a contact record and your Key Fields are properly set up, the Pri. Phone, Phone 2, and Phone 3 Key Field information from that contact record will be displayed at the top of the dialog box.

### Due Date

This shows the contents of the `Date` field from the activity.

### Due Time

This shows the contents of the `Time` field from the activity.

### Description

This shows the contents of the `Description` field from the activity.

### Type

This shows the contents of the `Type` field from the activity.

### Priority

This shows the contents of the Priority field from the activity.

### Duration

This shows the contents of the Duration field from the activity.

### Database

This shows the name of the database containing the contact record to which the activity is linked. This will be blank if the activity is not linked.

### To Contact

Click this button to go to the contact record to which the highlighted activity is linked. If the activity is not linked, this button will not be available.

### Notepad

If the highlighted activity is linked to a contact, you can click this button to bring up a window where you can view the contact's Notepad. To close this window, press ESC on the keyboard or double-click the control box on the side of the title bar.

### Goto Date

Click this button to open the Go to Date dialog box, where you can select a date whose activities you want to view. This is used when you have a large number of activities due on different days.

## Add

Click this button to add a new activity.

## Edit

Click this button to open the highlighted activity in edit mode.

## Complete

Click this button to have the highlighted activity completed. The `Completed` check box in the activity will be marked and the completed `Date` and `Time` fields will reflect the current system date and time. The activity will be removed from the list. (This list only includes incomplete activities.)

## Delete

Click this button to have the highlighted activity completed deleted.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Pending_Activity_List)<<1}

## The Activity Manager Browse View

Browse view allows you to view records in a tabular format.

While in browse mode, you can rearrange the order of fields so that two fields can be examined side-by-side by clicking and dragging the field. You can change the size of the columns by placing your cursor near the border of two column’s headers. When the cursor changes to a double-headed arrow, click and drag the border to the desired location.

### Browse Field

The activities are listed here in column format. You can rearrange the order of the items in the display by clicking on the column header and dragging it to the desired position.

### Edit

Click this button to open the Activity dialog box for the selected activity and edit the activity.

### Go To Activity

Click this button to open the Activity Manager to the selected activity.

### Save Settings

Click this button to keep any changes you have made in the way the activity information is displayed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND2_Activity_Manager_Full_Browse_Mode)<<1}

# TeleMagic for DOS to TeleMagic for Windows Conversion Utility

# The Convert Database Dialog Box

## TM-DOS Database Directory

In the `TM-DOS Database Directory` field, change the path to the TeleMagic DOS database directory that you want to convert.

If you are not sure of the database's location, click **TM-DOS Database Directory** to open the Select Directory dialog box. Use this dialog box to locate and highlight the database, then click **Select**. You will return to the Convert Database dialog box.

## TM-WIN Database Name

Enter a new name for the TeleMagic Enterprise for Windows database you want to create in the `TM-Win Database Name` field.

## TM-WIN Database Directory

If necessary, in the `TM-Win Database Directory` field, edit the path to the directory where you want to store this new database, then complete the path by entering a sub-directory name for the new database.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM2_Creating_a_TeleMagic_for_DOS_Import_Format)<<1}

# The Database Conversion Information Dialog Box

## Convert Database with Multiple Contacts per Company

If you want to convert all records to one level only, unmark this check box.

If you want to assign records to two levels (Company and Contact), mark this check box. This will activate the two buttons directly beneath the check box.

## Identify Company Records...

Click this button to open the Identify Company Records dialog box, where you can specify what fields identify your Level 1 records. (This is not all of the Level 1 fields; it is the minimum field or fields required to determine the company.) If TeleMagic encounters multiple records with the same data in the specified fields, it will create one Level 1 record for all of them. (For example, if you have three records for different contacts at a company, one Level 1 record will be created with three child records.)

## Assign Fields to a Level

Click this button to open the Assign Fields to a Level dialog box, where you can select which fields should be used in the Level 1 records and which should be used in the Level 2 records.

## Contact Recalls

Choose None if you do not want to convert your recalls into Call type activities.

Choose `All...` to create an activity for each of your recalls. The Recall Information dialog box will appear, allowing you to determine on whose calendar the recalls should be scheduled.

## Indexes

Choose `None` if you do not want to add your DOS indexes to Windows.

Choose `All` if you would like the indexes available after the conversion.

## Listboxes

Choose `None` if you do not want to convert any list boxes.

Choose `All...` if you want to convert all list boxes. The Select Directory dialog box will appear where you can locate your DOS database list boxes. Locate the directory which contains list boxes and click **Select**.

> **Note**
> The list boxes will be added to the database directory in TeleMagic. They will only be available if you have your Directory preferences for list boxes set to use the database directory.

## Filters

Choose `None` if you do not want to convert any filters.

Choose `All` if you would like your filters available after the conversion.

## Activities

Choose `None` if you do not want any of your DOS activities available in Windows.

Choose `All` if you want to convert all activities. The Select Directory dialog box will appear where you can locate your DOS activities. Locate the directory which contains your activities and click **Select**.

## Call History

Choose `None` if you do not want to create completed activities based on your call history files.

Choose `Some...` if you want to convert a group of call history records based on a date range. The Call History dialog box will appear where you can select the directory containing your call history files and the range of records to convert.

Choose `All` if you want to convert all call history data to completed activities. The Select Directory dialog box will appear. Locate the directory where call history is recorded and choose Select.

**WARNING!**

It is not recommended that you convert all of your call history unless absolutely necessary. Be aware that if you do so, the conversion may take an extremely long time, especially if you have an extensive call history. If possible, choose `Some...` and limit the records that are converted.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

# The Identify Company Records Dialog Box

Use this dialog box to indicate which fields the conversion program should examine when determining whether two records belong to the same company.

## TM-DOS Fields

This list shows all fields in the DOS database.

## Fields Which are the Same...

This list shows the fields TeleMagic should use to identify contact records that belong to the same company. If TeleMagic encounters multiple records with the same data in the specified fields, it will create one Level 1 record for all of them. (For example, if you have three records for different contacts at a company, one Level 1 record will be created with three child records.)

> **Note**
>
> This is not the entire list of fields that should be used on Level 1. It is the minimum needed to identify records with the same company. If you select multiple fields, TeleMagic will check each one to make sure that the data contained in them exactly matches. A difference in punctuation, case, or spelling between records will result in two Level 1 records being created. Selecting fewer fields will help minimize this.

## Add, Add All, Remove, Remove All

Use these buttons to move fields from the list on the right to the list on the left, and vice versa.

## Expression

Use the Expression text box to write a dBase expression that will help TeleMagic recognize which contacts belong to the same company. When you have completed the expression, click **Add** to add it to the list on the left. (See the topic Detailed Listing of Command Functions for help in writing expressions.)

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

# The Assign Fields To A Level Dialog Box

### Company Level Fields
Fields common to all records in the same company should appear under this list. These fields will be used in your Level 1 records.

### Contact Level Fields
Fields containing data unique to each contact should appear under this list. These fields will be used in your Level 2 records.

### Move
Use these buttons to move fields from one list to the other.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½MANAGE2_Creating_and_Defining_Fields)<<1}

# The Recall Information Dialog Box

This dialog box is used to convert recalls to scheduled activities in TeleMagic Enterprise. In TeleMagic for DOS, recalls were not user-related, but contact -related. In TeleMagic Enterprise, recalls must be assigned to a user. You must select the user(s) who should receive the new recall activities.

## Start Field

By default, TeleMagic will assume that the user who created the contact record in DOS should be assigned the recall for that record. TeleMagic will check for a Start field in the DOS database and offer it as a default. If you would like to use the Start field, or another field in the database that contains the User ID, select the `Start Field` radio button. If you want to use the Start field, leave the default entry. If you want to use a different field, select it from the drop-down list.

## Expression

If a field contains a User ID, but the User ID is buried among other information in the field, select the `Expression` radio button and write an expression in this text box that will pull the User ID from the rest of the information in that field.

## User to Assign Recalls to if...

Select the user who should receive the activities in the event there is no data in the selected field or expression for a record.

**Note**

TeleMagic for Windows will not View $$$ as a valid User ID. If $$$ was the only user in your system, all activities will be assigned to the user selected in this list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½UM2_Creating_a_TeleMagic_for_DOS_Import_Format)<<1}

# The Call History Dialog Box

## Call History Directory

Point TeleMagic to the correct location of the Call History directory by entering it in this field, or by clicking **Call History Directory...** and using the Select Directory dialog box.

## Start Date / End Date

Enter a Start Date and an End Date to limit the call history information that will be converted. Only entries recorded between those dates will be converted.

# The Error Log System Status Log Dialog Box

This dialog box appears when an error has occurred. The entries you make here can be used by your system administrator or TeleMagic reseller or technical support to troubleshoot the problem.

### Steps to Reproduce Fault

Enter the different keystrokes, button clicks, check box marks, and menu item selections that you made immediately prior to having an error occur.

### Observed Behavior

Enter exactly what happened at the time the error occurred.

### Expected Behavior

Enter exactly what you thought was supposed to happen.

### Additional Comments

Enter any additional information about the error, your installation, your workstation or anything else that you feel may help in identifying the cause of the problem.

### Summary

Enter a summary of the problem in this field.

### OK

Click this button to save the error log entry. When this error log entry is saved, TeleMagic will also save information about the portion of the program you were in, your system environment and settings, and other detailed information that is important when attempting to analyze the problem.

After you have saved the error log entry, contact your corporate help desk, system administrator, or TeleMagic reseller for assistance. In addition, if the problem is severe or recurrent, you can contact TeleMagic's Technical Support department for assistance.

Any error log entry that is created will be stored in the error log and can be viewed by going to **Help**, **View System Log**.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLP>secondï¿½ADVANCED_Logging_and_Viewing_Errors)<<1}
Logging and Viewing Errors

# The Script Fields Dialog Box

## Available fields from level (level number)

This is the list of fields that are available from the current and parent levels of the current database.

## Selected fields from level (level number)

This is the list of fields that have been selected from the current and parent levels of the current database. You will be able to input data directly into these fields from the script without having to go to the contact record.

**Note**

Be aware that if you use this script in another database, the selected fields will only be available if they are named exactly the same as they are in the current database. It is generally assumed that you will be using a script that contains fields in the database in which it was created.

## Add / Add All / Remove / Remove All

Select **Add** to select the field highlighted the `Available fields from level (level number)` to be included in the script. It will move to the `Selected fields from level (level number)` list.

Select **Add All** to select all available fields.

Select **Remove** to exclude the field highlighted in the `Selected fields from level (level number)` list. It will move to the `Available fields from level (level number)` list.

Select **Remove All** to exclude all selected fields.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

# The Browse Sales Forecasts View

Browse view allows you to view records in a tabular format.

All of the Sales Forecasting fields are shown in the Sales Forecast browse window. While in browse mode, you can rearrange the order of fields so that two fields can be examined side-by-side by clicking and dragging the field.

You can change the size of the columns by holding the cursor near the border of two column headers. When the cursor changes to a double-headed arrow, click and drag the border to the desired location.

You can split the window into two partitions by clicking in the lower left corner and dragging a partition window open.

Open a Sales Forecast record by double-clicking it, highlighting it and either clicking **Edit**, or highlighting it and pressing ENTER.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SALES1_Sales_Forecast_Browse_View)<<1}

# The Report Groupings Dialog Box

## Available Groupings

This is the list of options you can use to group forecasts in the report.

## Selected Groupings

Forecasts in the report will be grouped according to these selections. For example, if you select `Sales Rep`, all forecasts for the same Sales Rep will appear together in the report and sub-totals can be generated for each Rep. You can select up to three groupings per report.

The order of the groupings in the list is very important to how the report is arranged, as well as in calculating subtotals and totals. For example, if you want to group by Sales Rep, then have the forecasts for each Sales Rep further grouped by Month, Sales Rep must be first in the list. After you have selected all of the groupings to be used, you can rearrange the order by dragging the mover box to the left of the grouping.

## Add

Click this button to move the highlighted grouping from the `Available Grouping` list to the `Selected Groupings` list. You can select as many as three groupings.

## Remove

Click this button to move the highlighted grouping from the `Selected Groupings` list to the `Available Grouping` list.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

# The TeleMagic Automation Server - Monitor Mode Screen

Press ESC to exit from this screen.

## Status line

This line at the top of the dialog box shows the selected server, selected queue, the current date, and the current time.

## Status

This column shows the status of each item. The possible statuses here are:

| | |
|---|---|
| Queued | The item has not yet been attempted and is in line to be sent. |
| Sent | The item was successfully sent. |
| Failed | The item was attempted but not successfully sent. |
| Retry | The item was attempted but not successfully sent and is waiting to be tried again. |
| Active | A item currently being processed. |
| Done | The master fax in a set of filtered faxes that has been expanded. |
| Pending | An item currently in the queue waiting to be processed. |
| Hold | An item for which a Delay Until time and date has been entered. |
| Printed | An item sent to the Print Queue that has been processed. |

## By

This is the ID of the server that processed the item.

## Port

This is the COM Port to which the modem or faxmodem that processed the item is connect.

## From

This is the User ID of the user who queued the item.

## To

This is the name of the person receiving the fax or message.

## Subject

This will display the fax subject if it is a fax, or `Wireless Message` if it is a message.

## Error

This shows any error that occurred for failed items.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Monitoring_a_Queue)<<1}

# The Edit Fax Dialog Box - Automation Server

### From
This is the author of the fax.

### To
This is the recipient of the fax.

### Fax #
This is the fax number to which the fax will be sent.

### Subject
This is the subject of the fax.

### Cover
This shows the cover sheet assigned to this fax. Enter the path and file name for a different cover sheet or click **Cover** to search for a file.

### Queue
This is the queue that this fax is currently in. Open the drop-down list to select a different queue.

### WP
This shows the word processor selected as the default by the user who created this fax. This is display only.

### Queued
This field shows the date the fax was added to the queue.

### Processed
This field indicates what has been done with the fax since it was added to the queue.

### Documents
These are the documents that are to be sent as part of this fax.

### Comment
Click this button to open the Fax Comments/Notes dialog box, where you can read or edit the cover comments included with this fax.

### Options
Click this button to open the Fax Options dialog box, where you can set a delay time and modify any of the settings for this fax.

### Detail
Click this button to open the Fax Detail pop-up window, where you can see all of the details and settings for this fax.

## Reports

Click this button to open the Select Custom Reports To Fax dialog box, where you can choose any custom reports you would like to be included in this fax.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_To_View_Change_the_Details_of_a_Fax)<<1}

# The Fax Comments/Notes Dialog Box - Automation Server

## Comments for cover sheet

This text box shows the comments that were recorded for this fax. Enter any changes or new information as needed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_To_View_Change_the_Details_of_a_Fax)<<1}

# The Fax Options Dialog Box - Automation Server

### Delay Until / Date / Time

This shows you the specified time and date to begin processing the fax. (If no hold time was set for the fax when it was created, this will display the current date and time.) If you set a future date or time, the fax will remain in the queue with the status Hold until that time.

### Priority

This shows you the priority of this fax. The default priority is 2, which causes the faxes to be processed in the order in which they are received by the queue. Priority 1 faxes will be sent to the top of the queue. Priority 3 faxes will be processed when there are no pending priority 1 or 2 faxes.

### Email Notify

This shows if the Automation Server will send the fax's author an e-mail message noting the details of the fax after it has been successfully processed.

### Email On Failure

This shows if the fax's author will be notified by e-mail in the event of an unsuccessful fax.

### Activity Create

This shows if a completed activity should be created for the fax's author after the fax is sent. (The document history for the contact record is based on these activities. This is recommended to maintain an accurate history.)

### Backward Compatible

This shows if the documents associated with this fax were created by a user who had the Backward Compatible setting marked in their Writing preferences. This alerts the Automation Server that the merge fields in the documents will be listed with the level first.

### Fail On Invalid Fields

This shows if the fax's author has his or her Fax preferences set to fail this fax if any of its merge fields are not valid.

### Notepad Stamp

This shows if the contact to whom the fax is being sent will have details of the fax stamped into his or her notepad.

### Stamp Documents

This shows if the a record of the documents sent with the fax, including the path and file name, will be stamped into the contact's notepad (if it is being stamped), the activity `Comments` field (if an activity is being created), and/or the Fax Stamp Key Field (if it is a memo field).

### Stamp Comments

This shows any cover comments will be stamped into the contact's notepad (if it is being stamped), the activity `Comments` field (if an activity is being created), and/or the Fax Stamp Key Field (if it is a memo field).

### Merge All Documents

This shows if the Automation Server should look for merge fields on the cover page and all additional documents being faxed.

### Merge Cover Page Only

This shows if the Automation Server should only look for merge fields on the cover page. If there are merge fields on the attached documents, they will be ignored. (This optimizes faxing if the following documents do not contain merge fields.)

### Do Not Merge Any

This shows if the Automation Server should not look for merge fields in any of the documents being faxed. (This optimizes faxing if there are no merge fields in the cover page or any following document.)

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Getting_Ready_To_Fax)<<1} Getting Ready to Fax

# The Fax Detail Dialog Box - Automation Server

This is a read-only description of the details of the information, settings, and status of this fax.

## From
This is the author of the fax.

## To
This is the recipient of the fax.

## Subject
This is the subject of the fax.

## Status
This is the status of the fax. It will display:

| | |
|---|---|
| Queued | If the item has not yet been attempted and is in line to be sent. |
| Sent | If the item was successfully sent. |
| Failed | If the item was attempted but not successfully sent. |
| Retry | If the item was attempted but not successfully sent and is waiting to be tried again. |
| Active | If this is an item currently being processed. |
| Done | If this the master fax in a set of filtered faxes that has been expanded. |
| Pending | If this is an item currently in the queue waiting to be processed. |
| Hold | If this is an item for which a Delay Until time and date has been entered. |
| Printed | If this is an item sent to the Print Queue that has been processed. |

## Priority
This shows you the priority of this fax. The default priority is 2, which causes the faxes to be processed in the order in which they are received by the queue. Priority 1 faxes will be sent to the top of the queue. Priority 3 faxes will be processed when there are no pending priority 1 or 2 faxes.

## Server
This displays the server that processed any sent or failed faxes.

## Retries
This displays how many times a failed fax has been attempted.

## Tagged
This displays Yes if the fax is tagged in Maintenance; No if it is not.

## Queued
This displays the date and time the fax was sent to the queue.

## Processed
This displays the date and time the fax was processed. If it has not been sent, it will display `Not Yet`

`Processed`.

## Email
This shows if the Automation Server will send the fax's author an e-mail message noting the details of the fax after it has been successfully processed.

## Email On Failure
This shows if the fax's author will be notified by e-mail in the event of an unsuccessful fax.

## Activity Create
This shows if a completed activity should be created for the fax's author after the fax is sent.

## Notepad Stamp
This shows if the contact to whom the fax is being sent will have details of the fax stamped into his or her notepad.

## Stamp Documents
This shows if the a record of the documents sent with the fax, including the path and file name, will be stamped into the contact's notepad (if it is being stamped), the activity `Comments` field (if an activity is being created), and/or the Fax Stamp Key Field (if it is a memo field).

## Stamp Comments
This shows any cover comments will be stamped into the contact's notepad (if it is being stamped), the activity `Comments` field (if an activity is being created), and/or the Fax Stamp Key Field (if it is a memo field).

## Fail On Invalid Fld
This shows if the fax's author has his or her Fax preferences set to fail this fax if any of its merge fields are not valid.

## # Times Requeued
This shows how many time the fax has been requeued.

## Port
This shows the COM Port that processed the fax.

## Document Process
This shows the total time it took to process the documents being faxed, including the cover letter.

## Online Time
This shows the total time spent on-line while the fax was being sent.

## More About…
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Fax_Report)<<1} Fax Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_View_Change_the_Details_of_a_Fax)<<1} To View/Change the Details of a Fax on the Automation Server:

## The Select Custom Reports To Fax Dialog Box

### Available Reports

This is the list of reports that are available for faxing.

### Selected Reports

This is the list of reports that have been selected for this fax.

### Add / Add All / Remove / Remove All

Select **Add** to move the highlighted report in the `Available Reports` list to the `Selected Reports` list.

Select **Add All** to move all reports in the `Available Reports` list to the `Selected Reports` list.

Select **Remove** to move the highlighted report in the `Selected Reports` list to the `Available Reports` list. The report will not be sent with this fax.

Select **Remove All** to move all reports in the `Selected Reports` list to the `Available Reports` list. No reports will be sent with this fax.

### Current Record Only / Reports' Default Filters

Select the `Current Record Only` radio button to merge only the fields in the record to which the fax is linked.

Select the `Report's Default Filters` radio button to use the default filter established for the custom report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Faxing_Custom_Reports)<<1}

# The Wireless Messaging Dialog Box - Automation Server

### Message text
This is the text of the wireless message. Enter any changes you desire.

### Save
Click this button to save your changes and return to the Automation Server Maintenance dialog box.

### Cancel
Click this button to return to the Automation Server Maintenance dialog box without saving your changes.

### Options
Click this button to open the Wireless Messaging Options dialog box, where you can change the preferences set for this message.

### Sending To
Indicates the recipient of the message

### Pager #
This is the phone number that the Automation Server will dial to send this message.

### Pager ID
This is the ID of the recipient of this message.

### Message Length
The number of characters in the message

### Update
Click this button to update the Message Length display.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_To_View_Change_the_Details_of_a_Wireless_Message)<<1}

# The Wireless Messaging Options Dialog Box - Automation Server

## Email On (Completion / Failure)

The `Completion` check box will be marked if the message's author wants to be notified by e-mail of the message is successfully sent.

The `Failure` check box will be marked if the message's author wants to be notified by e-mail if the wireless message fails to be sent.

## Baud Rate

This shows the baud rate set by the message's author. Remember, this is the baud rate that can be accommodated by the paging carrier for the recipient of the message. Do not change this unless you know the baud rate for that paging carrier.

## Number Of Retries

This shows the number of times this message will be retried if it fails in processing.

## Packet Size

This shows the packet size set for this message. Do not change this unless you know the maximum packet size that can be accommodated by the recipient's paging carrier.

## Delay Until Date / Time

These settings allow you to set a hold time for the message. Enter the date and time you would like the message sent in the `Delay Until Date` and `Time` fields. The message will be held in the queue until the specified time.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_To_View_Change_the_Details_of_a_Wireless_Message)<<1}

# The Delete Faxes Dialog Box - Automation Server

### Tagged

Click this button to delete the tagged items. (Tagged items are indicated by an asterisk in the Maintenance screen.)

### Highlighted

Click this button to delete the highlighted item.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Deleting_Faxes_and_Wireless_Messages)<<1} Deleting Faxes and Wireless Messages on the Automation Server

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Automation Server Queues

# The Requeue Entries Dialog Box - Automation Server

## Tagged

Click this button to requeue the tagged items. (Tagged items are indicated by an asterisk in the Maintenance screen.)

## Highlighted

Click this button to requeue the highlighted item.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Automation Server Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Requeuing_Faxes_and_Wireless_Messages)<<1} Requeuing Faxes and Wireless Messages on the Automation Server

# The Tag Options Dialog Box - Automation Server

## Tag All

Select this radio button to tag all of the items in the current queue.

## Tag All Status

Select this radio button to tag all of the items in the current queue with a particular status. Open the drop-down list to choose the desired status.

## Tag All User

Select this radio button to tag all items by a specific user. Open the drop-down list and select a user.

## Tag All Date

Select this radio button to tag all items by a specific date. Enter a date or click the Date Picker icon to search for a date.

## Clear Tags

Select this radio button to clear all tags.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Tagging_Faxes_and_Wireless_Messages_in_Maintenance_Mode)<<1}

# The Print Faxes Dialog Box - Automation Server

## Tagged

Click this button to print the tagged items. (Tagged items are indicated by an asterisk in the Maintenance screen.)

## Highlighted

Click this button to print the highlighted item.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Printing_Faxes_and_Wireless_Messages)<<1}

# The Goto Dialog Box - Automation Server

### Date
Mark this check box to go to items of a specific date. Enter the date or click the Date Picker icon to search for a date.

### User
Mark this check box to go to items of a specific user. Open the drop-down list and select the user.

### Status
Mark this check box to go to items of a specific status. Open the drop-down list and select the status.

### OK
Click this button to go to your selection in the Automation Server Maintenance dialog box. Items will be grouped according to your selection and the first item for the selected goto criterion will be highlighted. (For example, if you selected User TST, the items will appear in order by user with the highlight on the first item queued by TST.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Finding_a_Specific_Fax_or_Message_in_Maintenance_Mode)<<1}

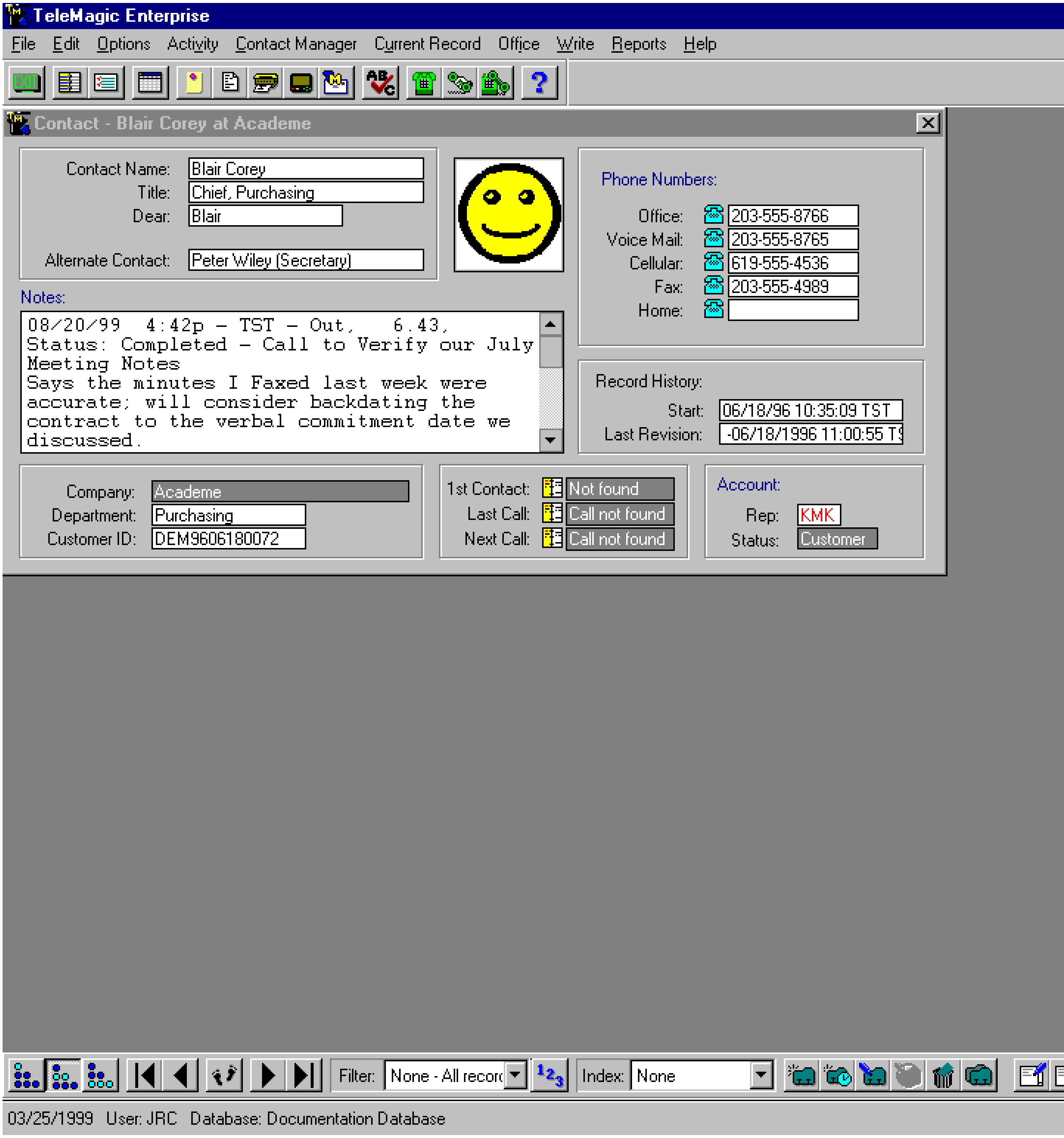
## The TeleMagic Contact Manager Screen

The Contact Manager screen consists of several elements. Near the top of the screen is the menu bar. Most TeleMagic functions can be performed from menu selections. There are also as many as three toolbars in the Contact Manager. Each of these toolbars can be configured to your requirements, and repositioned on the screen as necessary. To find the name of a particular tool on a toolbar, move your cursor over it and, in a few seconds, a ToolTip will open with the name of the tool.

Two toolbars are pre-configured with TeleMagic: the System Toolbar and the Primary Contact Manager Toolbar. The System Toolbar is located by default near the top of the screen, just below the menu bar. The Contact Manager Toolbar is located by default near the bottom of the screen, just above the status bar. If you undock either of these toolbars, you will see that they have labels identifying them. The name of the System Toolbar will depend on your Toolbar Configuration preference setting, found on the Directory page of the Preferences dialog box. The Primary Contact Manager Toolbar is labeled "Contact Manager Toolbar". If you configure the Secondary Contact Manager Toolbar, it will be labeled "Contact Manager Toolbar (Secondary)". To change the configuration of the pre-defined toolbars, or to configure the Secondary Contact Manager Toolbar, open the Preferences dialog box to the Toolbar page. If the Activity Manager is open, one or two of its toolbars may be at the top of the screen as well.

The Status bar is located at the very bottom of the screen and provides information such as the current user, current database, time, etc.

The most significant part of the Contact Manager Screen is your database screen. This provides you with a direct interface with your data in a manner that makes the most sense in your business. You can present your information in many different ways using a variety of views, each with its own particular function.




**Click on the screen for brief descriptions of the different areas**

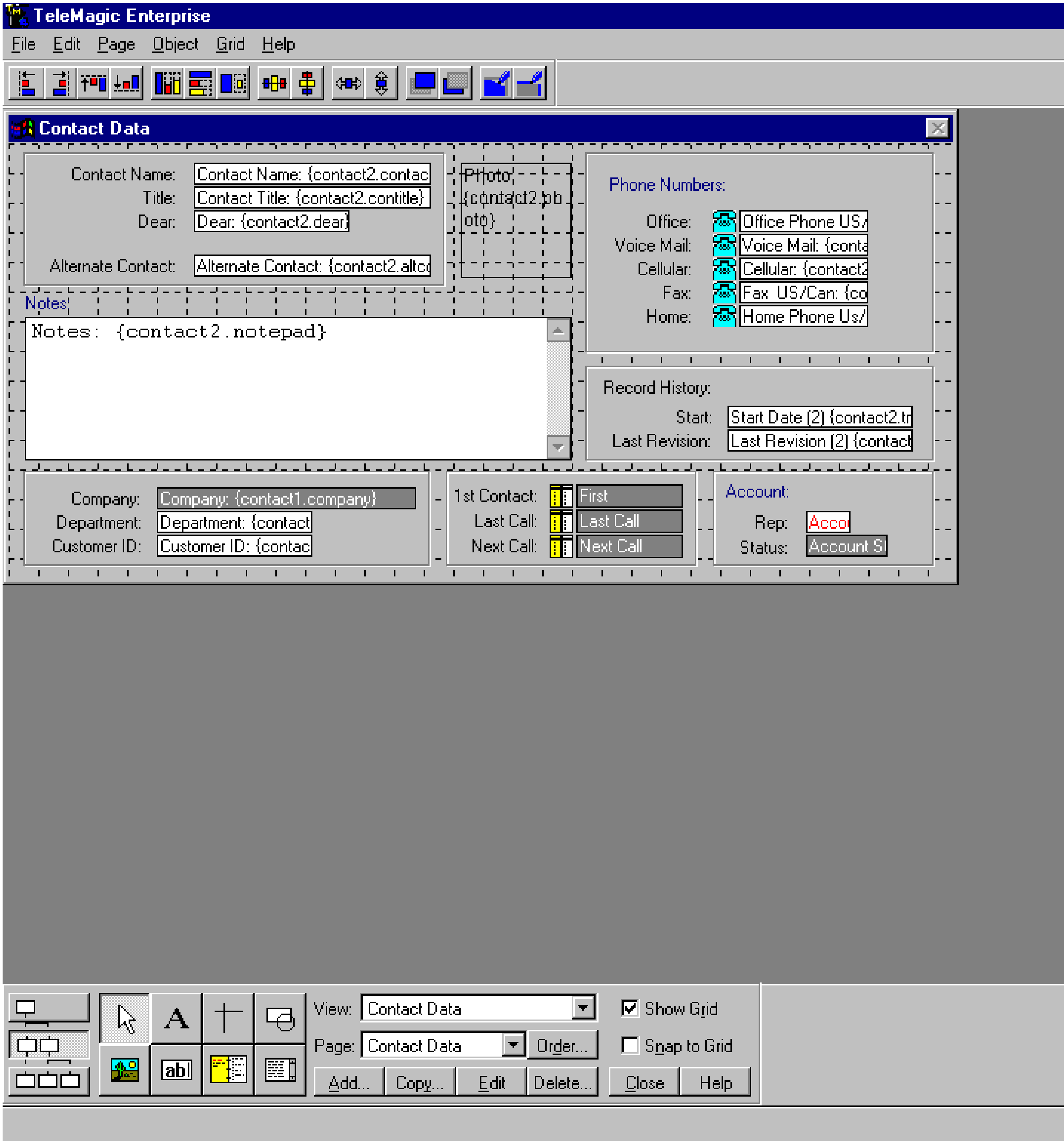
## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1}The Contact Manager

## The Screen Designer Screen

The TeleMagic Screen Designer allows you to easily create one or more views for each level of a database. Each view can be comprised of any number of individual pages.

On the graphic below, click on the portion of the Screen Designer screen on which you want more information.




Click on the graphic for a brief explanation of the different areas.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Screen_Designer)<<1} The Screen Designer

## The Spell Checking Dialog Box

### Not Found
This shows the word being evaluated that does not appear in the master or custom dictionaries.

### Replace With
Enter the correct spelling in this field. If the correct spelling appears in the list below, click on it and it will be entered automatically.

### Suggestion list
This is the list of suggested alternative spellings provided by the Spell Checker for the highlighted questionable word. The number of suggestions offered is affected by the number of close matches that the Spell Checker finds.

### Suggest
If you have selected to not have the Spell Checker auto suggest any words to you in Maintenance, this button will become available. Click it to have the Spell Checker offer a list of alternative spellings for a questionable word.

### Undo Last
Click this button to cause the last change made to revert to the previous spelling.

### Change All
Click this button to replace all occurrences of the misspelling with the indicated spelling.

### Change
Click this button to replace the questionable word with the word in the `Change to` field.

### Ignore all
If the word is not misspelled, click this button to have the Spell Checker ignore this and any additional instances of the highlighted word.

### Ignore
If the word is not misspelled, click this button to keep the original word. If the word is repeated in the text, it will be questioned again.

### Add
Click this button to add the word being evaluated to the dictionary. New words are added to the user's dictionary, they are not available to others.

### Auto Correct
Click this button to add the unrecognized word to the Auto-Correct dictionary. The word will be changed to the selection whenever it is encountered in the future. There is no warning when a word in the Auto-Correct dictionary is being replaced.

## Done

Click this button when you are finished with the Spell Checker. Any changes you have made will be placed into the text region.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALC_Spell_Checker)<<1}

# The Wireless Messaging Options Dialog Box

## Notify On (Completion / Failure)

Select the `Completion` check box if you want to be notified by e-mail of the successful sending of the message.

Select the `Failure` check box if you want to be notified by e-mail if the wireless message fails to be sent.

## Baud Rate

This is the default baud rate that can be accommodated by the paging carrier for the selected recipient of the message. If this message is for a single TeleMagic user, this will default to that user's Wireless Messaging preference and cannot be edited. If it is for a user group or a contact, it will default to the lowest possible setting. Do not edit this setting unless you know that the paging carrier for each recipient of the message can accommodate a higher baud rate.

## Number Of Retries

This sets the number of times this message should be retried if it fails the processing.

## Monitor Transmission

Mark this check box to have a pop-up window show you the status of the transmission while it happens.

## Packet Size

This is the default packet size that can be accommodated by the paging carrier for the selected recipient of the message. If this message is for a single TeleMagic user, this will default to that user's Wireless Messaging preference and cannot be edited. If it is for a user group or a contact, it will default to the lowest possible setting. If the packet size is set higher than the paging carrier can accommodate, information may be lost. Do not edit this setting unless you know that the paging carrier for each recipient of the message can accommodate a higher setting.

## Delay Until Date / Time

If you are sending your message to a queue, you can specify that the message should be held in the queue until a specific time. Enter the date and time you would like the message sent in the `Delay Until Date` and `Time` fields.

## Use Filter

If you are sending your message to a queue, and you have a Page ID and Pager # field established for your database, you can select to send the message to all contacts in a filter. Mark this check box, then select the filter from the list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLP>thirdï¿½WIRE_How_to_Use_Wireless_Messaging)<<1}

# The Add a Letter Dialog Box

## Description

Enter the description for this letter here. This description will appear in the Word Processor Document selection box for future use.

## Filename

Enter a unique file name for this letter here. (Do not enter the path to the file. The default path will be used for Quick Letters. If you need to store the document in a different path, add the letter from the Document selection box.)

## Log in document history

Mark this check box if you intend to create and print this letter immediately from the word processor. Normally, an activity logging that a document was printed is only created if you print it using the **Print** button at the Document selection box. If you print from the word processor, TeleMagic has no way of knowing it was printed. This check box allows you to have a log entry created for this letter if you intend to print it in the same session that you create it.

## This file will be stored in (path name)

This shows the location where the file will be stored.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WORD1_Quick_Add)<<1}

# The Output Filename Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

### Enter output filename

The default name for the file that should be created on export will appear here. Enter a different file name if necessary.

### How to…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½UM3_To_Execute_an_Existing_Contact_Record_Export_Format)<<1} Execute an Existing Contact Record Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½UM3_To_Run_an_Existing_Activity_Export_Format)<<1} Run an Existing Activity Export Format:

# The Wireless Message Detail Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

This view-only dialog box shows the contents and sending information from the highlighted wireless message.

### Message

This is the contents of the selected message.

### Send To

This will display the user, user group, or contact who was selected to receive the message.

### Pager #

This will display the pager carrier number of the user to whom the message is being sent.

### Pager ID

This is the Pager ID of the user to whom the message is being sent. (If the message was sent to a user group, this can be used to determine to which user in the group this message belongs.)

### Status

This displays the current status of the message:

**Queued** Messages which have not yet been attempted and are ready to be sent will have this status.

**Sent** Messages which have been successfully sent will have this status.

**Active** The message currently being processed will have this status.

**Retry*** If the message has already been unsuccessfully attempted, it will be tried again the number of times specified Wireless Messaging preferences. The status will read Retry1, Retry2, etc.

**Failed** Messages which were attempted unsuccessfully the specified number of times will have this status.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WIRE_Wireless_Messaging_Maintenance)<<1}

# The Edit Holidays Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Maintenanceï¿½ ï¿½ ï¿½ )<<1}

### Date

Enter the date of the holiday in this field. Use the Date Picker icon to select the date from a Go To Date dialog box.

### Description

Enter a description of the holiday in this field.

### Warn when scheduling on this holiday

Select this radio button if you would like to receive a warning when attempting to schedule an activity on this holiday. This will be treated the same as a weekend day and is generally used for holidays that are non-work days.

### Allow scheduling on a holiday

Select this radio button if it does not matter if activities are scheduled on this date. Holidays will be noted on the calendar, otherwise it will be treated as any other day. This is generally used for holidays on which you will be working.

### Recurring Annually

This option is not available if you are changing an existing holiday.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND1_Holiday_Maintenance)<<1}

# The Tasks Assigned by User (user ID) Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Assigned Tasksï¿½ ï¿½ ï¿½ )<<1}

## List tasks assigned (by you / to you)

Select the `by you` radio button to view tasks you have assigned to others. Select the `to you` radio button to view tasks others have assigned to you.

## Index on (Status / User / Date / Description)

Select the order in which want the activities and To-Dos to appear:

| | |
|---|---|
| **Status** | Sort by the activity or To-Do's Status field. |
| **User** | If this is a list of tasks assigned by you, this will sort by the user to whom the task is assigned. If this is a list of tasks assigned to you, this will sort by the user who assigned you the task. |
| **Date** | Sort by the activity or To-Do's due date. |
| **Description** | Sort by the activity or To-Do's Description field. |

## # Activities

This is the number of the activities that have been assigned either by you or to you (depending on your selection in the `List tasks assigned`, above).

In the text box you will see information about each assignment.

## # To-Do's

This is the number of the To-Dos that have been assigned either by you or to you (depending on your selection in the `List tasks assigned`, above).

In the text box you will see information about each assignment.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Multi_User_Calendars)<<1}

## The Accept/Reject Activity Assignment Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Assigned Tasksï¿½ ï¿½ ï¿½ )<<1}

When a new assignment is made to you, it is in a “pending” status, and will appear on this list with no mark in either the `Accept` or `Reject` columns. If you want to leave it pending, do not accept or reject it. The activity or To-Do will appear in your calendar, but will have the word “Pending” in the title bar.

Press SPACEBAR to toggle between Accept and Reject for the selected activity.

### Accept

This shows whether you have accepted this assignment. If you have accepted it there will be a mark here.

### Reject

This shows whether you have rejected this assignment. If you have rejected it there will be a mark here.

### Date

This is the due date of the assigned activity or To-Do.

### Time

This is the due time of the assigned activity. This will be blank for To-Dos.

### Owner

This is the person who has assigned this task to you.

### Description

This is the description of the assigned activity or To-Do.

### Accept All

Click this button to accept all of the assignments.

### Reject All

Click this button to reject all of the assignments.

### Add comment to highlighted

Click this button to open the Comment for Pending Assignment dialog box where you can view existing comments associated with the highlighted activity or add a new comment.

### OK

Click this button to close this dialog box. If you have rejected any task, it will be sent back to the user who assigned it to you. If you have accepted the task, the word “Pending” will be taken off of the title bar and it will become a normal activity or To-Do.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Acknowledging_Accepting_and_Rejecting_Assignments)<<1} Acknowledging, Accepting, and Rejecting Assignments

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Multi_User_Calendars)<<1} Multi-User Calendars

# The Comment for Pending Assignment Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Assigned Tasksï¿½ ï¿½ ï¿½ )<<1}

### Stamp

Click this button to add a date, time, and User ID stamp to the new comment text.

### Add New Comment

This allows you to enter a new note that will be stamped into the `Comments` field of the associated activity or To-Do. If you are rejecting the assignment, consider entering a comment to explain the reason.

### View Existing Comments

This shows any comments already associated with this assignment. This is display only.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp| proceddn.BMP<JumpId(TM.HLP>thirdï¿½CALEND3_Acknowledging_Accepting_and_Rejecting_Assignments)<<1}

# The Center Objects Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

If you have selected a single object, you can center it vertically and/or horizontally on the page.

## Individually / As a Group

If you are centering multiple objects, you can center them on the page as a group or individually.

If you select `Individually` each object will be exactly centered with no reference to other objects in the group; objects will be stacked on top of each other.

If you select `As a Group` the entire group will be centered vertically and/or horizontally on the page while each individual object retains its relative position in the group.

## Vertically

Mark this check box to center the object(s) top to bottom.

## Horizontally

Mark this check box to center the object(s) left to right.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Centering_Objects)<<1}

## The Line Properties Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

### Pen

Select the thickness of the line here.

### Pen Color

Click on the **Color** button to open a palette and select a color for the line. The currently selected color is indicated to the left of the button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_Line_Properties)<<1}

# The Add View or Page Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

## Add View

Click this button to add a new view.

## Add Page

Click this button to add a new page to the current view.

## How to…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_To_Add_a_New_View)<<1} Add a New Screen View:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½SCREENS_To_Add_a_Page)<<1} Add a New Screen Page:

# The Add Script Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

### Script

Enter the name of the new script here.

### Font

Select the font for the text from the drop-down list.

### Font Size

Select a point size for the text from the drop down list.

### Font Effects

Select font style and color using these four buttons. You can make the text any combination of bold, italic, and underlined. Click on the Font Color button to open a palette and select a color for the text.

### Centering Controls

Select whether the text should be left-justified, centered, or right-justified using these three buttons.

### Bulleted List

Click this button to begin making a bulleted list. When finished, click on this button again to end the bulleted list.

### Script text

Enter any text for the first branch. In this top branch you may want to have special information regarding the use of the script, such as the database with which it was designed to be used, the database level that should be used, etc.

### Insert Expression

Click this button to open the Expression Builder and create an expression to use in your script.

### Associate Fields

Click on this button to open the Script Fields dialog box and select database fields which can be accessed from this script.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT1_Script_Setup)<<1}

# The Add Branch Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

### Branch

Enter the name of the new branch here.

### Font

Select the font for the text from the drop-down list.

### Font Size

Select a point size for the text from the drop down list.

### Font Effects

Select font style and color using these four buttons. You can make the text any combination of bold, italic, and underlined. Click on the Font Color button to open a palette and select a color for the text.

### Centering Controls

Select whether the text should be left-justified, centered, or right-justified using these three buttons.

### Bulleted List

Click this button to begin making a bulleted list. When finished, click on this button again to end the bulleted list.

### Branch text

Enter the text for the branch.

### Insert Expression

Click this button to open the Expression Builder and create an expression to use in this branch.

### Associate Fields

Click on this button to open the Script Fields dialog box and select database fields which can be accessed from this branch.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT1_Script_Setup)<<1}

# The Select External Documents To Fax Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

## These documents are available to be selected for faxing

This is the list of documents that have already been captured that can be selected to be sent with the current fax.

## These documents will be sent with this fax

This is the list of documents that will be sent with the current fax.

## Add / Add All

Select **Add** to move the highlighted document in the top list to the bottom list. The document will be sent with the current fax. Select **Add All** to move all documents in the top list to the bottom list.

## Delete

Click this button to delete the document highlighted in the top list. It will not be available for future faxes.

## Remove / Remove All

Select **Remove** to move the highlighted document in the bottom list to the top list. The document will not be sent with the current fax. It will remain available for future faxes. Select **Remove All** to move all documents in the bottom list to the top list.

## Preview

Click this button to preview the document highlighted in the bottom list.

## Cancel

Click this button to return to the External Documents dialog box without saving your choices. (Clicking this will only cancel your document selections. It will not restore any documents you have deleted.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Faxing_External_Documents)<<1}

# The External Document Description Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

## Doc. Type

This tells you what type of document you are going to capture.

## Please describe this document

Enter the a brief description of the document you will be capturing. This will allow you to identify it when selecting it to send with the fax.

## OK

Click this button to begin the capture procedure and return to the External Documents dialog box. At this point, your default printer has been changed to the TeleMagic Fax printer. To capture a document, *leave TeleMagic open* and ALT+TAB to the application containing the document you would like to capture. Print the document in the normal manner.

## Cancel

Click this button to return to the External Documents dialog box and canceling the capture procedure.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Faxing_External_Documents)<<1}

# The Select Standard Reports To Fax Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

## Faxable Reports

This is the list of reports can be selected to be sent with the current fax. If the report you would like to fax is not displayed, exit the Send Fax dialog box and open the report dialog box. If there is a **Fax** button on the dialog, this report is faxable. Make any necessary report settings and click **Fax**. The report will be generated at that time and added to the Faxable Reports list.

## Selected Reports

This is the list of reports that will be sent with the current fax.

## Add / Add All

Select `Add` to move the highlighted report in the `Faxable Reports` list to the `Selected Reports` list. The report will be sent with the fax. Select **Add All** to move all reports in the Faxable Reports list to the Selected Reports list.

## Delete

Click this button to delete the report highlighted in the `Faxable Reports` list. It will not be available for future faxes.

**Note**

These reports are generated when the report dialog box is opened and the **Fax** button is selected. As the information on which the report is based changes in TeleMagic, these reports become obsolete. Old reports should be periodically deleted.

## Remove / Remove All

Select **Remove** to move the highlighted report in the `Selected Reports` list to the `Faxable Reports` list. The report will remain available for future faxes. Select **Remove All** to move all reports in the `Selected Reports` list to the `Faxable Reports` list.

## Preview

Click this button to preview the report highlighted in the `Selected Reports` list.

## Cancel

Click this button to return to the Send Fax dialog box without saving your choices. (Clicking this will only cancel your report selections. It will not restore any reports you have deleted.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1}

# The Copy Quick List Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

**Note**

Reports and Quick Lists are database-specific; that is, you cannot create either type of report with one database open, and expect to be able to use it automatically in another database. TeleMagic does, however, give you the option of copying a report from a different database and using it (where possible) in the current database. Of course, often the differences in structure between two databases will mean that a report created in one will be useless in another; but with some adaptation, you will find that one report can serve the same purpose in several different databases.

## Database

Open this drop-down list and select the database containing the report you would like to copy.

## Report

Open this drop-down list and select the report you would like to copy.

## How to…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½RPT3_To_Modify_a_Custom_Report_or_Quick_List_and_Keep_the_Original)<<1} Modify a Custom Report or Quick List and Keep the Original:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½RPT3_Copying_Reports_and_Quick_Lists_from_Another_Database)<<1} Copy Reports and Quick Lists from Another Database

# The Set Server Active Time Dialog Box - Server Specific

**Note**

If you have set the global downtime, the downtime setting made here for a particular server will override the global setting for this server only.

## Offline at

Enter the time when the server should go offline using the 24 hour clock.

## Online at

Enter the time when the server should come back online using the 24 hour clock.

## Enforce Downtime on

Mark the days when the downtime will be in effect.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SERVER_Establishing_Server_Downtime)<<1}

# The Record Initialization Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Synchronizationï¿½ ï¿½ ï¿½ )<<1}

This dialog box allows you to write a Data Synchronization Server transaction for every field in the current record and its parent record(s). This will allow you to send the entire record to synchronized installations of TeleMagic the next time the site is processed.

## Linked Activities

If you would like to additionally include any activities that are linked to the current contact, select this check box.

## Level 2 Children

If the current record is on Level 1, select this check box to additionally include Level 2 child records.

## Level 3 Children

If the current record is on Level 1 or Level 2, select this check box to include Level 3 child records. (If you are on Level 1, you must also include the Level 2 children to include Level 3 children.)

## Analyze

If you would like a count of how many records will be included from each level, select the **Analyze** button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT4_Record_Initialization)<<1}

# The Users and Scheduling Options Dialog Box

This dialog box allows you to select the users who should receive the activities and specify how the activities should be distributed.

## Available Users

This list will include all users who have granted you full access to their activity schedules.

## Add

Click this button to move the highlighted user in the `Available Users` list to the `Create Activities for` list.

## Add All

Click this button to move all users in the `Available Users` list to the `Create Activities for` list.

## Remove

Click this button to remove the highlighted user from the `Create Activities for` list and return him or her to the `Available Users` list.

## Remove All

Click this button to remove all users from the `Create Activities for` list and return them to the `Available Users` list.

## Create Activities for

The users in this list will be assigned activities for the contacts selected in the Set Multiple Activities for (Level) dialog box.

## Send Email to All Users

If you would like the user(s) in the `Create Activities for` list to receive e-mail notification informing them of the assigned activities, select the `Send E-Mail to all users` check box.

## Distribute Fixed Number

If you would like each of the selected users to only receive a given number of activities, select the `Distribute Fixed Number` radio button and enter the number of activities you would like to create for each user in the `Distribute Fixed Number` field.

**Note**

When activities are scheduled, TeleMagic will go through the selected filter in order of the selected index. If the total number of activities you are scheduling is less than the number of records in the filter, the last records in index order will not receive activities. (For example, if you have 5 users and are scheduling 10 activities each, only the first 50 records in the index will receive activities.) If the total number of activities is greater than the total number of records, some users may not receive activities. (For example, if there are 43 records in the filter, you have 5 users, and are scheduling 10 activities each, one user will receive only 3 activities, while another will not receive any.)

## Divide Total Evenly

If you want to schedule activities for every contact in the filter, and have those activities evenly distributed between users, select `Divide Total Evenly`.

## Analyze

Click this button to view a summary of your selections. This will show the total number of records in the filter, how many activities each user will receive, and how many records are left over and will not receive activities (if applicable).

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager)<<1}

# The Zip Code Entry Dialog Box

### Zip Code

Enter the ZIP code for the contact and press ENTER.

### List of Cities

As soon as you enter a ZIP code, this text field will be populated with the list of cities located in that ZIP code area. Highlight the city in which your contact is located.

### OK

Click on this button to select the highlighted city. The city, state, ZIP code and telephone area codes will be automatically entered into the appropriate fields in your contact record (based on your Key Fields).

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(addon.hlpï¿½IDH_CONTENTS)<<1}

## The Notebook Browse View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notebookï¿½ ï¿½ ï¿½ )<<1}

This dialog box provides a browse view of all Notebook records. To go to a record, point to it and double-click, highlight the record and press ENTER, or highlight it an click **Edit**. You can change the order the columns appear by clicking on the column header and dragging the column to the desired position. You can resize the columns by holding the cursor over the border between two headers. When the cursor changes to a double-headed arrow, click and drag the border to the desired proportions.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|CONTDN01.BMP<JumpId(TM.HLPï¿½CONTACT3_The_Notebook)<<1}

# The Edit Script Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

## Script:

Enter the name of the script in this field. (This will also be the name of the top branch in the script.)

## Font

Select the font for the text from the drop-down list. You can shift the focus to this control by pressing CTRL+F.

## Font Size

Select a point size for the text from the drop down list. You can shift the focus to this control by pressing CTRL+S.

## Font Effects (RTF Controls)

Select font style and color using these four buttons. You can make the text any combination of bold, italic, and underlined. Click on the Font Color button to open a palette and select a color for the text. The following hot key combinations can be used with these controls:

CTRL+B – `toggles the bold setting`

CTRL+I – `toggles the italic setting`

CTRL+U – `toggles the underline setting`

CTRL+O – `displays the color picker dialog`

## Centering Controls

Select whether the text should be left-justified, centered, or right-justified using these three buttons. The following hot key combinations can be used with these controls:

CTRL+L – `left align`

CTRL+E – `center align`

CTRL+R – `right align`

## Bulleted List

Click this button to begin making a bulleted list. When finished, click on this button again to end the bulleted list.

## Text Window

In the window, enter the text for the top branch of the script.

## Save

Click on this button to save changes to the branch and return to the `Branch Scripts Setup` dialog box.

## Insert Expression

Click this button to open the Expression Builder and create an expression to use in your script.

## Associate Fields

Click on this button to open the Script Fields dialog box and select database fields which can be accessed from this script.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT2_Editing_Branches)<<1}

# The Edit Branch Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

## Branch:

Enter the name of this branch.

## Font

Select the font for the text from the drop-down list. You can shift the focus to this control by pressing CTRL+F.

## Font Size

Select a point size for the text from the drop down list. You can shift the focus to this control by pressing CTRL+S.

## Font Effects (RTF Controls)

Select font style and color using these four buttons. You can make the text any combination of bold, italic, and underlined. Click on the Font Color button to open a palette and select a color for the text. The following hot key combinations can be used with these controls:

CTRL+B – toggles the bold setting

CTRL+I – toggles the italic setting

CTRL+U – toggles the underline setting

CTRL+O – displays the color picker dialog

## Centering Controls

Select whether the text should be left-justified, centered, or right-justified using these three buttons. The following hot key combinations can be used with these controls:

CTRL+L – left align

CTRL+E – center align

CTRL+R – right align

## Bulleted List

Click this button to begin making a bulleted list. When finished, click on this button again to end the bulleted list.

## Text Window

In the window, enter the text for this branch of the script. You may place an expression in the text using the guidelines above.

## Insert Expression

Click this button to open the Expression Builder and create an expression to use in your branch.

## Associate Fields

Click on this button to open the Script Fields dialog box and select database fields which can be accessed from this branch.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT2_Editing_Branches)<<1}

# The Change Document Description Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

## Word Processor

The word processor used to create the document is indicated in this field. This cannot be changed.

## Description:

Enter any changes to the document’s description in this field.

## File Name...

If you want to use a different document than the one originally selected, enter it in the `File Name` field. If you enter a new file name, it will be created. If you enter the name of an existing file, that file will be used. You can browse for the document by clicking on the **File Name…** button.

**Note**

The previous document will still exist, but it will no longer be associated with this description in TeleMagic.

## Document Created By

The originator of the document, and the date it was created, is indicated on this line.

## Store In

Select the appropriate radio button under this heading if you would like to store the document on a different list.

- If you would like the document to appear on your user specific list of documents or templates, select the `User` radio button. You will be the only user with access to this document or template.

- If you would like the document or template to appear on the global list of documents or templates, select the `Global` radio button. All users will have access to this document or template.

- If you would like the document or template to appear in the database specific list of documents or templates, select the `Database` radio button. The document or template will be available to any users who are working in the current database.

## Merge Fields From This Level:

If you will be changing this document or template to contain fields from a different level than the one currently selected, select the level from the `Merge Fields From Level:` radio buttons. The levels are indicated by name. Level 1 is the leftmost radio button.

**Warning!**

Exercise caution when changing the Level. Unless you will be changing the fields contained in the document, you should not change this setting. The selected level should reflect the lowest level from which TeleMagic is required to pull data when printing this document or a document based on this template.

## Link to (Current Contact / Other Contact / No Link)

Select a contact record to which this document is linked. If you do not want this document linked to a contact record, select `No Link`.

## Contact Info

If this document is linked to a contact record, and that contact record is in the current database, clicking this button will open the Contact Information dialog box, where you will see information from that contact record. If the contact record is in a different database than the one that is currently open, you will be asked if you want to close the current database and open that database. If you answer **Yes**, the new database will be opened and the contact information will be shown in the Contact Information dialog box. If you answer **No**, you will be returned to this dialog box.

## Search my contacts for

Enter the information to be searched for to locate the record the document is to be linked to.

## Search

Click this button when you are ready to search for the information entered in `Search my contacts for` field. This will search the current database.

## Advanced Search

Click this button to open the Advanced Search dialog box. Use this feature to link documents to records in other databases.

## Browse Contacts

Click this button to open a Browse screen for the current database and select the record to which the document is to be linked using the browse view.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WORD1_To_Change_the_Details_of_a_Document_or_Template)<<1}

# The Reset Unique Number Fields Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Unique Number Fieldsï¿½ ï¿½ ï¿½ )<<1}

Use this dialog box to reset up to five unique number fields at a time. (If you do not have five unique number fields on the database level, the excess drop-down lists will be unavailable.)

## Contact Level:

From the `Contact Level` radio buttons, select the level containing the unique number(s) you would like to reset. If a level does not contain any unique number fields, it cannot be selected.

## Replace:

If you would like to only reset the counter portion, select the `Counter portion` radio button. The unique numbers for existing records will continue to contain the date information from the date on which the record was added. If the System ID has changed since a record was added, the original System ID will be displayed in fields that contain this information.

If you would like to reset the entire field, select the `Entire field` radio button. Any dates contained in the field will be updated to the current date and System ID information will reflect any changes.

**Note**

The `Counter portion` option is intended to renumber the field for records that already contain a unique number. Select the `Entire field` option if you have just added a unique number field and are generating the unique numbers for existing records (i.e., if the unique number field is blank for those records). If you only reset the counter portion, that is the only part of the number that would be generated for those records. If you have a literal, date, or System ID information in the number, it would be left out.

## Unique Number Field

Select the field or fields you want to reset from the drop-down list(s).

## Starting Number

From the `Starting Number` fields, select the number with which you would like the counter portion of the unique number to begin.

**Example:** If your unique number template starts with CONTRACT, then allots 5 characters for the counter portion of the unique number field, setting the starting number at 500 would cause the field in the first record in the database to be reset to CONTRACT00500, the next to CONTRACT00501, and so on.

**WARNING!**

Every unique number field is templated to contain a certain number of digits in the counter portion. Be careful that you do not set a starting number that will cause the unique numbers to exceed the highest number allowed by the template. For example, if you have a three-digit unique number field, you can have 999 unique numbers. Make sure the starting number plus the total number of records in your database does not exceed this. If it does, duplicate numbers may be generated.

## Reset Numbers

When you have selected all of the fields you would like to reset, click this button.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½CONTACT2_Resetting_Unique_Numbers)<<1}

# The External Program Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Toolbar Configurationï¿½ ï¿½ ï¿½ )<<1}

### Filename...

Enter the complete path and executable file name to the program that this toolbar icon should launch or click the Ellipsis button to browse for external programs. When you have located the desired program, double-click to select.

### Parameter:

Type any command line parameters that are required when opening the program. See the documentation for the software in question to determine what command line parameters may be required.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½PREFS_Adding_a_Button_to_Launch_an_External_Program)<<1} Toolbar Configuration: Adding a Button to Launch an External Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>thirdï¿½PREFS_Toolbar_Configuration)<<1} Toolbar Configuration

## The First Product Registration Screen

### Company/User Name

If this is an evaluation or unregistered copy of TeleMagic, you may use these fields to change the registration information that was entered during installation. Enter the Company and User name under which you would like the product registered in the appropriate fields. (Once TeleMagic is registered, you will not be able to modify this information.)

### Call In Registration

Select this radio button if you intend to register by phone. You may register by telephone, Monday through Friday, between the hours of 8 a.m. and 5 p.m., Pacific Time.

### Fax Registration

Select this radio button if you intend to fax your registration to TeleMagic. You may use this registration option any time.

### Email Registration

Select this radio button if you intend to send your registration to TeleMagic via e-mail. You may use this registration option at any time.

### Next

After making your selection, click **Next** to proceed with the registration process.

### Cancel

Click **Cancel** to exit the registration process without registering.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_The_Product_Registration_Process)<<1}

# The Second Product Registration Dialog Box

Enter each serial number you are registering in the fields. If you have not yet registered your main installation of TeleMagic, enter the TeleMagic serial number in the *first* field and press ENTER. Enter each TeleMagic Additional User Pack you are registering in the following fields. (You must enter the main TeleMagic serial number in the first field.)

## Incompatible Serial Number for this Installation

This message will appear next to the serial number field if the number you have entered is not valid for your installation of TeleMagic. Some examples of incompatible serial numbers include the following:

- If you have already registered your TeleMagic installation, you will not be able to enter a first time installation or upgrade serial number.

- You will not be able to enter a first time installation serial number if you have performed an upgrade, or an upgrade serial number if you have performed a first time installation.

- Professional to Enterprise serial numbers can only be entered on an installation of TeleMagic Enterprise that was upgraded from an installation of TeleMagic Professional. Additionally, you will only be able to use Professional to Enterprise user packs on the number of users that originally existed in TeleMagic Professional. After that number has been reached, you will use standard TeleMagic user upgrade serial numbers.

- You will only be able to enter user upgrade serial numbers for the number of users who existed in your installation of TeleMagic prior to upgrade.

- You will not be able to enter a single user pack serial number on an installation of TeleMagic that already has 5 or more users. (Single User packs are only valid on network installations with less than 5 users.)

If you have received an incompatible serial number, contact your reseller or TeleMagic for assistance.

## Invalid Serial Number!

This message will appear next to the serial number field if the number you have entered is not a valid TeleMagic serial number. Double check the number to make sure you have entered it exactly as it appears on your Key Card. Make sure that you have not entered the number 0 using the letter O. If the serial number has been entered correctly, contact TeleMagic or your reseller for assistance.

## Next

Click on this button when you have entered the serial number(s) of the product(s) you are registering and are ready to continue with the registration process.

**Note**

If you have entered an invalid serial number, you will not be able to proceed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_The_Product_Registration_Process)<<1}

## The User Information Dialog Box

Enter name, address, telephone, e-mail address, and dealer information in the fields indicated. (Your Dealer ID is located on your Key Card.)

### Back

Click on this button to return to the Save Registration Information dialog box.

### Print

When you have entered the required information, click on this button to print the registration form. The printed form will contain a fax number where you can send your registration information. TeleMagic will return your Authorization Code. When you receive the code, access the registration screen again and select `Enter authorization code or change registration information` on the first Product Registration screen.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp| proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_The_Product_Registration_Process)<<1}

# The Product Authorization Dialog Box

The serial number you entered on the Product Registration dialog box will be displayed in the top field on the left side of this dialog box. Verify that this information is correct before proceeding.

### Registration Code:

Call the number displayed on the screen and provide this code and the serial number for the product you are registering.

### Authorization Code:

When you call in your registration code and serial number, you will receive an authorization code. Enter the authorization code in this field.

### Back

Click this button to return to the Product Registration dialog box and make any necessary corrections before proceeding.

### Next

Click this button when all required information has been correctly entered and you are ready to proceed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_The_Product_Registration_Process)<<1}

# The Save Registration Information Dialog Box

The fields on the left side of this dialog box will contain the information regarding the products you are currently registering.

### Back

Click on this button to return to the preceding dialog box and correct any errors in the fields on this screen.

### Finish

Click on this button to save registration information and complete the registration process.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_The_Product_Registration_Process)<<1}

# The Unable to Locate Activity Files Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½ )<<1}

This dialog box will appear if your activity files do not exist in the path you have specified for them. This could be caused if you do not have access to the directory containing the files from the current workstation or if you do not have network security access to the files or path using your current network login. It could also occur if the activity files have been deleted from the directory containing them.

If you receive this message, you should determine why TeleMagic is unable to access the files in the specified path and correct the problem accordingly. You may need to move your files to a network path that can be accessed from your workstation or with your network login. If the activity files have been deleted from the network, you may have to restore them from backup.

## Find

This will default to the TeleMagic \COMMON directory. If you have moved your files from the directory entered in Activity preferences, this will temporarily return you to using the common activity files. (If you want to permanently use the activities files in the common directory, you must go into Activity preferences and update your `Location of Activity Files` setting.)

If you have valid activity files in another path, enter it in the field or click **Find** to locate the directory containing the files. The selected directory must contain the following files:

actcmts.cdx
actcmts.dbf
actcmts.fpt
actextdf.cdx
actextdf.dbf
actextdf.fpt
activity.cdx
activitiy.dbf

## OK

Click on this button to accept the selected path and open TeleMagic. (The files must exist in the specified path to access TeleMagic.)

## Exit TeleMagic

Click on this button to exit TeleMagic without selecting a path.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½PREFS_Activity_Preferences)<<1}

# The Delete Word Processor Document Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

Use this dialog box to delete a word processing document. You have the choice of deleting the actual document file, or only deleting TeleMagic's association with the file.

## Document Description

The document's description.

## Document Path

The location of the document.

## Delete file from TeleMagic word processing only

Select this radio button to remove the document's entry on the Word Processor Documents list but keep the file on disk.

## Delete file from disk as well as TeleMagic

Select this radio button to delete the document completely.

## OK

Click on this button to delete TeleMagic's reference to the file. If the `Delete file?` check box is marked, the file will be deleted as well.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½WORD1_Deleting_Documents_and_Templates)<<1}

# The Welcome to TeleMagic V4 Dialog Box

This dialog box opens when you first launch TeleMagic. It contains important information regarding the use of TeleMagic and the need to make regular backups of the data stored with TeleMagic. Be sure that you read and understand this dialog box.

### I have read this message, do not display it in the future.

Select this check box if you understand the message, and no longer want for it to be displayed at start-up. Until this check box is marked, this message will continue to appear each time you log in with your User ID.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM1_How_You_Should_Back_Up)<<1} How You Should Back Up
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# The Create Record? Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Accounting Linksï¿½ ï¿½ ï¿½ )<<1}

## Company

The company name for the record to be synchronized will appear in this field.

## Address

The address of the company whose record is to be synchronized will appear in these three fields.

## Phone

The voice telephone number of the company whose record is to be synchronized will appear in this field.

## Fax

The fax number of the company whose record is to be synchronized will appear in this field.

## Yes

If you want to add or update the record indicated, click on this button. When this record is updated the procedure will continue with the next record.

## No

If you do not want to update the record indicated, click on this button. The procedure will continue to the next record without updating.

## Cancel

Click on this button to discontinue the process without updating any more records.

## Continue w/o prompting

Click on this button to update all remaining records. No further prompts will be displayed.

# The [Level] Calculation Order Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Calculated Fieldsï¿½ ï¿½ ï¿½ )<<1}

## Field List

This list shows all calculated fields for the current level. TeleMagic will calculate the fields in the order that they appear on this list. Use the mover box to the left of the field name to change the calculation order.

## Expression

This box displays the calculation expression defined for the highlighted field.

**Hint**

If another calculated field is contained in the expression, that field should be calculated first.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TM.HLP>thirdï¿½ADVANCED_Setting_the_Calculation_Order_for_Calculated_Fields)<<1}

# The Limited List Box Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(List Boxesï¿½ ï¿½ ï¿½ )<<1}

This dialog box appears if security has been placed on this list box that limits modification to supervisor users. It also appears if you are in an area of the program where you already have the maximum number of windows open. (In this case, you will not be able to access any of the dialog boxes available off the main list box.)

### Select

Click this button to place the highlighted item in the field.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|CONTDN01.BMP<JumpId(TM.HLP>thirdï¿½CONTACT3_Adding_Data_Using_List_Boxes)<<1}
Adding Data Using List Boxes

# Select Users

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

### Give Access to Users from Group

If you would like to quickly assign access to all users in an existing user group, select the group from this list. All users in the group will move from the `Users Without Access` list to the `Users With Access` list.

### Users Without Access

Users in this list will not see this report on the list at the Custom Reports selection box.

### Add

To move a user from the `Users Without Access` list to the `Users With Access` list, highlight the user and click this button.

### Add All

To move all users from the `Users Without Access` list to the `Users With Access` list, click this button.

### Remove

If you have added a user in error, highlight him or her in the `Users With Access` list and click this button. (You will not be able to remove supervisor users.)

### Remove All

To deny access to this report to all non-supervisor users, click this button.

### Users With Access

Users in this list will have access to this report. (The level of access is controlled by their database security rights.)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|
proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT2_Accessing_the_Report_Generator_and_Starting_a_Report)<<1}

# The Which Activity? Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½ )<<1}

### Completed

If the activity has been completed, the date it was completed will be entered in this column.

### Time

The scheduled start time for the activity.

### Description

The description of the activity as it appears on your calendar. The description may be truncated to fit the available space.

### Status

The status of the activity as indicated in the Activity dialog box. This column will indicate completed when the completed checkbox is marked in the Activity dialog box.

### Type

The type of activity, such as call or meeting.

### Select

Press this button to go to the Activity dialog box for the highlighted activity.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Viewing_and_Editing_Existing_Activities_and_To_Dos)<<1} Viewing and Editing Existing Activities and To-Dos

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND2_Working_with_Existing_Activities)<<1} Working With Existing Activities

# Import Format Name

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Enter a Name for the Import Format

Enter a name for the format in the field provided. This is the name that will appear on the list of available import formats when you begin an import. The name can be up to 47 characters long. Any printing character can be used in the name, including spaces, underscores, quotation marks, etc. Carriage returns and control characters cannot be used.

## Back

Use this button to return to the previous step in the wizard. Since this is the first step in the wizard, this button is disabled.

## Next

When you are satisfied with the name for your import format, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Import Format Type

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

In this step, you will select the type of import your new format will perform. The format type is based on the file to be imported.

### Import using TeleMagic for Windows format

Select this radio button if this format will be used to import from other TeleMagic databases. This format can be used for any Windows version of TeleMagic, including Professional.

### Import directly from a TeleMagic for DOS installation

Select this radio button if the source of your imports were created in any version of TeleMagic for DOS. The DOS installation where the database was created must be available to use this option.

### Import from a single dBase III file

Select this option if the database is a dBase III file.

### Relate separate database files for each level in TeleMagic

Select this option if you have several flat files and would like to combine them into a single TeleMagic relational database. Each file being imported will become a separate level on the TeleMagic database.

### Other import file types

Select this option for any other format.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Name step.

### Next

When have chosen the format type, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Import Activity Files?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Import contact records

Select this option if you will only be importing contact records.

### Import to the Activity Manager

Select this option if your import will include activity data. If you select this, you will be able to import contact data as well.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Format Type step.

### Next

When you have determined whether to import activity data, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Locate the TMCUMAST.DBF File

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Enter the path to the TeleMagic TMCUMAST.DBF file

Enter the path in the field provided.

### Find

Click this button to open a Select Directory dialog box to find the path to the TMCUMAST.DBF file.

### Create Express Import Format

Mark this checkbox if all of the fields in your TeleMagic for DOS database exactly match the fields in your TeleMagic Enterprise database and you intend to accept all of the default options for the import.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Format Type step.

### Next

When you have identified the path to the TMCUMAST.DBF file and decided whether to use the Express Format option, click this button to proceed to the next step. You will be able to return and change this later if necessary. If you have chosen to create an Express Import Format, this button will toggle to **Finish**. Click **Finish** to complete the new format.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Locate and Identify the Related Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Enter the path where your related files are located.

Enter the path in the designated field. All files to be imported must be located in the same directory (folder).

### Find

Click this button to open a Select Directory dialog box and browse for the location of the files.

### Select the file that contains your Level 1 records.

Click on the arrow to open a drop-down list. Select the file from the list that will become the Level 1 records in your database.

### Select the file that contains your Level 2 records.

Click on the arrow to open a drop-down list. Select the file from the list that will become the Level 2 records in your database. You must identify a file to be imported to Level 2 to use this option.

### Select the file that contains your Level 3 records.

Click on the arrow to open a drop-down list. Select the file from the list that will become the Level 3 records in your database. This field may be left blank.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Format Type step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# List of File Types

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### List of File Types

Select the file type you will be importing from the list. Scroll down the list for more choices.

### Select the Delimiter for this file:

Enter the character that will be used as a delimiter in this field. This field is only available when you have selected the User Defined Delimited file type.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Format Type step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Locate TeleMagic Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## File Path Field

Enter the path to the TeleMagic files in the field. If the files were exported, the file corresponding to level 1 will be named FILENAME1.DBF. If you are importing directly from a TeleMagic installation, the file corresponding to level 1 will be named CONTACT1.DBF. All files to be imported must be in the same directory. When the level 1 file has been identified, the files for the other level(s) will be indicated below this field.

## Find

Click **Find** to open a Select Directory dialog box and browse for the file location.

## Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Activity Files? step.

## Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Create Import Expression

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Import Expression

Enter the expression that will be used to limit the files to be imported in the field.

### Expression

Click the **Expression** button to open the Expression Builder. Use the Expression Builder to create the desired expression.

### Clear

Click **Clear** to clear the Import Expression field.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Locate TeleMagic Files step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary. Since an expression is optional, this button is always available.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

# Match Source Fields with Target Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Field Name

The names of the fields in your target database are listed in this column. Click on the **Field Name** button, which serves as the column header, to toggle between displaying the field name and prompt and displaying the field name only.

## Assigned Field

Click on the field in this column to make a drop-down list of fields from the source database available. Select the field from the list that you want imported into the target field indicated in the column to its left. Fields that have already been assigned are indicated with an “X”. Fields indicated in red are of different data types. You can use an expression instead of specifying a field. Click the **Assigned Field** button, which serves as the column header, to toggle the display between field names and sample data.

## Ellipsis Button

Click on the ellipsis button in each field to open the Expression Builder and create an expression to determine what data is imported into the target field.

## Auto Assign

Click the **Auto Assign** button and TeleMagic will match any fields in the source database with fields in the target database of the same name. It is possible that incompatible fields will be matched. When field of one type is matched with a field of an incompatible type, the entry will be indicated in red.

## Prev Sample

Click the **Prev Sample** button to change the sample data displayed in the Assigned Field column. The Assigned Field column must be in the Sample Data mode, and there must be at least one field assigned, for this button to have any effect.

## Next Sample

Click the **Next Sample** button to change the sample data displayed in the Assigned Field column. The Assigned Field column must be in the Sample Data mode, and there must be at least one field assigned, for this button to have any effect.

## Back

Use this button to return to the previous step in the wizard. There are more than one places from which this step can be accessed. Clicking this button will return you to the previous step in whichever procedure you are following.

## Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

# Include Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Do not include activities

Select this radio button if you do not want to import activities.

### Include linked activities only

Select this radio button to only import activities that are linked to contact records.

### Include unlinked activities only

Select this radio button to only import activities that are not linked to contact records.

### Include both

Select this radio button to import all activities.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Match Source Fields with Target Fields step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Select the Import Mode

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Single user

Select this radio button for the fastest import. You must have exclusive use of the database to use this option.

### Multi-user

Select this radio button to perform imports if you do not have exclusive use of the database. Some import options will not available if you choose this option.

### Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Select Action to be Taken when Validation Fails

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

This step applies to data which is stored in fields with validated list boxes, or which is validated based on an expression.

### Ignore the validation and import the data anyway

Select this radio button to import the data even though it fails the validation for this field in the target database.

### Reject the entire record if any field fails validation.

Select this radio button to reject the entire record if any of its fields fail validation.

### Import the record, but skip any invalid fields

Select this radio button to import only those fields which either pass validation, or which are not validated. Fields which do not pass validation will not be imported.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Select the Import Mode step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Select Action to be Taken if the Record Already Exists

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Create a new record anyway

Select this radio button to create a new record.

### Merge with existing record

Select this radio button to merge the imported record with the existing record.

### Reject incoming record

Select this radio button to reject the incoming record.

### Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

## Select When to Update the Index Order

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### During Import

Select this radio button to update the index order during the import. This is the recommended option for relatively small imports.

### After import, during rebuild

Select this radio button to update the index order during the post-import rebuild. If this option is chosen, the import will be faster. This is the recommended option for larger imports.

### Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Perform Field Calculations During Import?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Calculate Fields During Import

Select this radio button to perform field calculations during the import. When this option is selected the import will take longer, but the fields will be up-to-date when the import is complete.

### Do not calculate fields

Select this radio button to skip calculating fields during the import. Selecting this option will result in a faster import, but the fields will not be up-to-date until the database is recalculated.

### Always update the Last Revision Field.

Mark this checkbox to update the Last Revision Field. If this option is selected, the Last Revision field for all records that are merged or added will contain the date and time of the import. If this option is not selected, the Last Revision field will be updated only if it is blank.

### Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Stamp Notepad

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Stamp Notepad

Mark this checkbox if you want the notepad, as designated in Key Field Preferences, to be stamped with the date and time of the import and the user ID of the person performing the import.

### Optional Text Field

Enter any text that you want included in the stamp (in addition to the date, time, and user ID) in this field. You must have marked Stamp Notepad for this field to be available.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Perform Field Calculations During Import? step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Progress Display Update

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Number of Records

Enter the number of records to be processed before updating the progress indicator. The higher the number, the faster the import will proceed. Setting this value to 0 will disable the progress indicator.

## Back

Use this button to return to the previous step in the wizard. There are several ways to arrive at this step, clicking **Back** will return you to the previous step in whatever procedure you were following.

## Finish

When you have completed your import design, click this button.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Include and Filter DOS Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Include Activities

Mark this checkbox to include activities from your DOS database in the import.

### Import linked and unlinked activities

Select this radio button to import all activities, regardless of link status.

### Import unlinked activities only

Select this radio button to import only those activities that are not linked.

### Import linked activities only

Select this radio button to import only those activities that are linked.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Match Source Fields with Target Fields step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# DOS Call History File

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Include Call History File

Mark this checkbox to create completed activities based on your DOS Call History file.

## Path to the Call History File

Enter the path to the DOS Call History file in this field.

## Find

Click the **Find** button to open a Select Directory dialog box and browse for the location of your Call History file.

## Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

## Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Create Activities Based on the DOS RCL Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Create activities from the RCL field…

Mark this checkbox to create recall activities in the Activity Manager based on the contents of your DOS RCL fields.

### …with duration of

Enter the duration, in minutes, that should be assigned to the recall activities in this field.

### Assign activities to a user

Select this radio button if all activities imported from the RCL fields are to be assigned to a specific user.

### User Drop-Down List

If you have elected to assign the activities to a user, select which user they are to be assigned to from this list.

### Use an expression to determine the user

Select this radio button to use an expression to determine which user each activity should be assigned to.

### Expression Field

If you are assigning the activities to users based on an expression, enter the expression in this field. You can choose to use the Expression Builder to create the expression rather than entering it directly.

### Expression

Click the **Expression** button to open the Expression Builder and create the expression used to select users to whom the activities will be assigned.

### Clear

Click the **Clear**  button to clear the contents of the Expression field.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the DOS Call History FIle step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import

Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1}
Importing Records From Another Program
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder)<<1} Expression Builder

# Import Filters, Indexes, and List Boxes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Import Filters

Mark this checkbox to import filters from your DOS database. Invalid filters will not be imported. Filters with duplicate names will be numbered.

### Import Indexes

Mark this checkbox to import indexes from your DOS database. All indexes will be imported, even if invalid. Invalid indexes can be edited to be made valid.

### Import List Boxes

Mark this checkbox to import list boxes from your DOS database. List boxes will be imported for fields which do not already have list boxes. List boxes which do not correspond to any existing field will be imported and will become active if the field is ever added.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Create Activities Based on the DOS RCL Field step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Attach Imported Activities to What Level

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Level:

Select the level that all imported activities will be attached to from the drop-down list. Activities can be created based on RCL fields, the Call History file, and TeleMagic for DOS activities.

### Assign unmatched activities to:

Select the user who will receive any activities that are not otherwise matched to a user who exists in the TeleMagic Enterprise installation from the drop-down list.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Filters, Indexes, and List Boxes step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

## Identify Parent-Child Relationships

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Select the level 1 field or expression that uniquely identifies each parent record for level 2

The drop-down list is a complete list of all fields on level 1. Choose the field which will be used to identify each record as a unique parent.

### Ellipsis

Click the ellipsis button to open the Expression Builder and create an expression that will identify unique records.

### Select the corresponding level 2 field or expression that identifies the children for each parent.

The drop-down list contains a list of all fields on level 2. Select the field which will be used to determine which level 1 record is the parent for each level 2 record.

### Ellipsis

Click the ellipsis button to create an expression which will be used to identify the parent record for each level 2 record.

### Select the level 2 field or expression that uniquely identifies each parent record for level 3

The drop-down list is a complete list of all fields on level 2. Choose the field which will be used to identify each record as a unique parent.

### Ellipsis

Click the ellipsis button to open the Expression Builder and create an expression that will identify unique records.

### Select the corresponding level 3 field or expression that identifies the children for each parent.

The drop-down list contains a list of all fields on level 3. Select the field which will be used to determine which level 1 record is the parent for each level 3 record.

### Ellipsis

Click the ellipsis button to create an expression which will be used to identify the parent record for each level 3 record.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Locate and Identify Related Files step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Locate and Identify the Source Import File

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Enter the path and file name of the source import file.

Enter the full path and file name for the source file in the field. You can choose to use the **Find** button to browse for the file rather than entering it directly.

### Find

Click the **Find** button to open a Select Directory dialog box to browse for the file to be imported.

### Create Express Import Format

Mark this checkbox if all of the fields in your source database exactly match the fields in your TeleMagic Enterprise database and you intend to accept all of the default options for the import.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Import Activity Files step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary. If you have chosen to create an Express Import Format, this button will toggle to **Finish**. Click **Finish** to complete the new format.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# SDF Field Parser

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Character Position Indicator

Each small line in this field represents one character position in the Data Field, immediately below. Larger lines alternate with numbers, representing 5 and 10 character positions, respectively. The numbers refer to which group of 10 they represent. For example, 1 marks the end of the first group of 10. When you click anywhere on this field, a limit pointer will appear. Also, a line associated with the pointer will appear in the Data Field. Click and drag the limit pointer to indicate where the break between fields should occur. You can create as many limit pointers as there are places where breaks in the data may occur.

## Data Field

This field displays data from the file identified in the previous step. Use this display as a guide to determine precisely where the breaks should occur.

## Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Locate and Identify the Source Import File step.

## Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Filter Activities Based on Date Range

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## From:

Enter the starting date in this field. Activities prior to this date will not be included in the import. This field may be left blank. If this field is filled in, but the `To:` field is left blank, all activities after the date indicated in this field will be included in the import.

## To:

Enter the ending date in this field. Activities after this date will not be included in the import. This field may be left blank. If this field is filled in, but the From: field is left blank, all activities prior to this date will be included in the import.

### Hint:

Leave both fields blank if you do not want to filter on date.

## Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

## Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Select Users for Whom to Import Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

This step only affects importing records that are not linked.

### Import activities for all users

Select this radio button if you want to import all unlinked records, regardless of the user they are assigned to.

### Import activities for selected users

Select this radio button if you only want to import unlinked records for certain users.

### Available Users

This field lists all users for whom activities can be imported.

### Add

Click this button to add the selected user from the Available Users list to the Selected Users list. You must have a user in the Available Users list highlighted for this button to be available.

### Add All

Click this button to add all of the users listed on the Available Users list to the Selected Users list.

### Remove

Click this button to remove the highlighted user from the Selected User list. The user will be returned to the Available Users list. You must have a user on the Selected Users list highlighted for this button to be available.

### Remove All

Click this button to return all users on the Selected Users list to the Available Users list.

### Selected Users

Users whose activities will be included in the import are listed in this field.

### Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import

Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1}

Importing Records From Another Program

# How Should Duplicate Records be Identified

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Use all existing indexes TeleMagic used for “duplicate record checking”

Select this radio button to identify imported records as duplicates if they are identified as duplicates by any index in the target database with the “duplicate record checking” property.

### Select an individual existing index

Select this radio button to identify duplicates based on a single index for each level which already exists in the target database.

### Create a new, temporary index

Select this radio button to use a temporary index which will be created in the next step.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Select Action to be Taken if Record Already Exists step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1}
Importing Records From Another Program

# Select Index

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Level 1 Index Name

Select the index to be used to identify duplicate level 1 records from the drop-down list.

## Level 2 Index Name

Select the index to be used to identify duplicate level 2 records from the drop-down list.

## Level 3 Index Name

Select the index to be used to identify duplicate level 3 records from the drop-down list.

## Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the How Should Duplicate Records be Identified step.

## Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Create Temporary Index

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Level 1

Enter an expression in this field which will be used to determine whether an incoming record already exists in the target database. You can enter the expression directly in the field, or you can use the Expression Builder.

### Expression

Click this button to open the Expression Builder and create the expression for this level.

### Clear

Click this button to clear the expression field for this level.

### Level 2

Enter an expression in this field which will be used to determine whether an incoming record already exists in the target database. You can enter the expression directly in the field, or you can use the Expression Builder.

### Expression

Click this button to open the Expression Builder and create the expression for this level.

### Clear

Click this button to clear the expression field for this level.

### Level 3

Enter an expression in this field which will be used to determine whether an incoming record already exists in the target database. You can enter the expression directly in the field, or you can use the Expression Builder.

### Expression

Click this button to open the Expression Builder and create the expression for this level.

### Clear

Click this button to clear the expression field for this level.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the How Should Duplicate Records be Identified step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Specify Memo Fields to Contain Rejected Data

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Select a memo field to contain rejected data on level 1

All level 1 memo fields are listed on the drop-down list. Select one to receive any data which is rejected from this level. If you do not want to retain rejected data, leave this field blank.

### Select a memo field to contain rejected data on level 2

All level 2 memo fields are listed on the drop-down list. Select one to receive any data which is rejected from this level. If you do not want to retain rejected data, leave this field blank.

### Select a memo field to contain rejected data on level 3

All level 3 memo fields are listed on the drop-down list. Select one to receive any data which is rejected from this level. If you do not want to retain rejected data, leave this field blank.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Select Action to Take When Validation Fails step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Include Activity Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Include Activities

Mark this checkbox to include activity records in this import.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Match Source Fields with Target Fields step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Select Enterprise Users for Whom to Import Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

This step only affects importing records that are not linked.

### Import activities for all users

Select this radio button if you want to import all unlinked records, regardless of the user they are assigned to.

### Import activities for selected users

Select this radio button if you only want to import unlinked records for certain users.

### Available Users

This field lists all users for whom activities can be imported.

### Add

Click this button to add the selected user from the Available Users list to the Selected Users list. You must have a user in the Available Users list highlighted for this button to be available.

### Add All

Click this button to add all of the users listed on the Available Users list to the Selected Users list.

### Remove

Click this button to remove the highlighted user from the Selected User list. The user will be returned to the Available Users list. You must have a user on the Selected Users list highlighted for this button to be available.

### Remove All

Click this button to return all users on the Selected Users list to the Available Users list.

### Selected Users

Users whose activities will be included in the import are listed in this field.

### Back

Use this button to return to the previous step in the wizard. There is more than one way to arrive at this step. Using this button will return you to the previous step in whatever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import

Format
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1}
Importing Records From Another Program

# Locate the TMAPPTS.DBF File

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Enter the path to the TeleMagic for DOS TMAPPTS.DBF file.

Enter the path to the file in the field. You can enter the path directly, or you can use the Select Directory dialog box.

### Find

Click this button to open the Select Directory dialog box and browse for the file's location.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Select Enterprise Users for Whom to Import Activities step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Locate the TMACMAST.DBF File

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Enter the path to the TeleMagic for DOS TMACMAST.DBF file.

Enter the path to the file in the field. You can enter the path directly, or you can use the Select Directory dialog box.

### Find

Click this button to open the Select Directory dialog box and browse for the file's location.

### Back

Use this button to return to the previous step in the wizard. From this step, **Back** will take you to the Select Enterprise Users for Whom to Import Activities step.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

# Import Field Rules

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

### Field Name

This field contains a list of all fields in the target database which have been matched to fields in the source database. Select the field for which field rules are to be set by clicking on it. The selected field will be highlighted. You can select one field rule for each field. Field rules that are incompatible with the selected field cannot be selected.

### Always replace

Select this radio button if you want to replace the contents of the field in the target database with the data from the source database in all cases.

### Replace if source is not blank

Select this radio button if you want to replace the contents of the field in the target database with the data from the source database as long as the data in the source database is not blank.

### Only replace if target is blank

Select this radio button if you only want to replace the contents of the field in the target database if the target is blank.

### Insert at beginning of existing data

Select this radio button to add the data in the source field to the beginning of the data in the target field.

### Append to end of existing data

Select this radio button to add the data in the source field to the end of the data in the target field.

### Sum of new and existing numeric data

Select this radio button to add the values of the source and target fields together and store the result. This option is only applicable to numeric data.

### Merge list data

Select this radio button to combine the contents of two lists. Duplicates will be eliminated and the resulting list will be presented in alphabetical order.

### Never replace

Select this radio button to retain the contents of the field in the target database in all cases.

### Back

Use this button to return to the previous step in the wizard. There are more than one places from which this step can be accessed. Clicking this button will return you to the previous step in whichever procedure you are following.

### Next

When you have identified the files to be imported and their respective levels, click this button to proceed to the next step. You will be able to return and change this later if necessary.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1}
Importing Records From Another Program

# System Information - User Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Helpï¿½ ï¿½ ï¿½ )<<1}

## Information Field

This page displays information about the current user. The information includes user ID, Name, rights granted, and the location of the user directory. The location of various user files, such as toolbar configurations and activities, are also listed here. This information cannot be edited on this page.

## Close

Click this button to close the System Information dialog box.

## Print

Click this button to print the information displayed on the current page.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_General_Problem_Solving_Methodology)<<1} General Problem-Solving Methodology

# System Information - Database Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Helpï¿½ ï¿½ ï¿½ )<<1}

## Information Field

This page displays general information about the current database. This information includes the name of the database, the current filter, the current index for each level, and the database directory. This page will indicate whether the database is linked to another application. If there is an entry on this database's Usage field, it will be displayed here.

## Print

Click this button to print the information displayed on the current page.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_General_Problem_Solving_Methodology)<<1} General Problem-Solving Methodology

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Database_Troubleshooting)<<1} Database Troubleshooting

# System Information - Current Record Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Helpï¿½ ï¿½ ï¿½ )<<1}

## Information Field

This page displays information about the current contact record. Information displayed includes CONTACTID, when the record was last changed and by whom, the record number relative to the database (e.g., 253 of 1097), and whether the record is linked to another application.

## Print

Click this button to print the information displayed on the current page.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_General_Problem_Solving_Methodology)<<1} General Problem-Solving Methodology

# System Information - System Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Helpï¿½ ï¿½ ï¿½ )<<1}

### Information Field

This page displays information about the installation including the location of the root directory, System ID, whether raster fonts are used, whether the installation is being run from a node, and the amount of memory available. The serial number will be displayed if the installation is registered, and the number of users will be indicated. Following is a list of significant files associated with the installation. These files are the .EXE, .DLL, and .APP files used by the various features of TeleMagic. The revision date and size of each file is indicated.

### Close

Click this button to close the System Information dialog box.

### Print

Click this button to print the information displayed on the current page.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_General_Problem_Solving_Methodology)<<1} General Problem-Solving Methodology

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Installing_a_Node)<<1} Installing a Node

# System Information - Environment

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Helpï¿½ ï¿½ ï¿½ )<<1}

## Information Field

This page displays information about the machine and operating system currently in use. The processor, operating system, screen resolution, available disk space on the current disk drive, and available RAM are all indicated.

## Close

Click this button to close the System Information dialog box.

## Print

Click this button to print the information displayed on the current page.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_General_Problem_Solving_Methodology)<<1} General Problem-Solving Methodology

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Isolating_and_Recognizing_the_Problem_Type)<<1} Isolating and Recognizing the Problem Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Memory)<<1} Memory

## System Information - Dealer Info

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Helpï¿½ ï¿½ ï¿½ )<<1}

### Information Field

This page displays information about the reseller who sold this copy of TeleMagic and TeleMagic's dealer information telephone number. If this information is missing, you will be provided with a toll-free number to call for dealer information. This information is found in the file DEALER.INF which is located in the \COMMON directory.

### Print

Click this button to print the information displayed on the current page.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½ADVANCED_System_Information_Screen)<<1} System Information Screen

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½ADVANCED_General_Problem_Solving_Methodology)<<1} General Problem-Solving Methodology

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½ADVANCED_Network_User_Count)<<1} Network User Count

# Advanced Contact Search

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Linkingï¿½ ï¿½ ï¿½ )<<1}

### Search For:

Enter the information to be searched for in this field.

### Search

Click this button to commence the search. This button will not become available until you have entered something in the `Search For:` field. The item will be linked to the first record matching the entry in the `Search For:` field.

### Database:

Select the database to be searched from the drop-down list.

### Level:

Select the level to be searched from the drop-down list.

### Index:

Select the index to be used for the search from the drop-down list. The index chosen will determine which field is searched for the information entered in the `Search For:` field.

### Browse

Click this button to open the Browse screen. The Browse screen will display the contents of the database indicated in the `Database:` field using the selected index.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SALES1_To_Go_to_a_Linked_Contact)<<1} To Go to a Sales Forecasting Linked Contact:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_To_View_Linked_Contact_Information)<<1} To View Contact Information from a Linked Activity:

# Select a Contact

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Linkingï¿½ ï¿½ ï¿½ )<<1}

## Field Names

The name of each of the fields in the selected database will appear at the top of each column. The columns can be resized by moving the cursor over the division between neighboring column headers, When the cursor changes to the sizing arrow configuration, click and drag to the desired proportions. The order of the fields can be changed by clicking the header of the column to be moved and dragging to the desired location.

## Record Display

All accessible records of the selected database and level are displayed across this field. Each record occupies one row.

## Select

Click this button to link the current item (sales forecast, activity, or e-mail message) to the highlighted record.

## Save Settings

Click this button to retain any changes made to the browse display.

## More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SALES1_To_Go_to_a_Linked_Contact)<<1} To Go to a Sales Forecasting Linked Contact:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_To_View_Linked_Contact_Information)<<1} To View Contact Information from a Linked Activity:

## Select Time

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½ )<<1}

### AM/PM

The selected radio button will indicate whether the time was in the morning or afternoon. When entering a time other than what is displayed, select the radio button corresponding to the desired time. These radio buttons are not displayed when 24 hour times are used.

### Hours

The buttons on either side of this label will change the time by one hour every time they are clicked.

### Minutes

The buttons on either side of this label will change the time by one minute every time they are clicked.

### Increment by Duration

The buttons on either side of this label will change the time by the default activity duration, set in Preferences, every time they are clicked.

### Select

Click this button to use the currently displayed time.

### Now

Click this button to change the time to the current time and apply it to the field from which this dialog box was called.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1} Scheduling Activities (Phone Calls, Appointments, and Meetings)

# Sales Forecasting Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Salesï¿½ ï¿½ ï¿½ )<<1}

### Information Field

The date and time the forecast was created, the ID of the user who created the forecast, the date and time the forecast was last changed, the ID of the user who last changed the forecast, the status of the sale, and the record the forecast is linked to, if any, is listed in this non-editable field.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Tack-It

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notes and Messagesï¿½ ï¿½ ï¿½ )<<1}

## Text Area

Type in the text area to leave a message.

## Pop-up Menu

To open the pop-up menu, right-click anywhere on the Tack-It. The following options are available:

- Save Select this option to save the note.
- Cancel Select this option to close the menu without making changes.
- Link This option opens a submenu to select the type of link; none, database, or contact.
- Font This option opens the Font dialog box. Only one font can be used at a time on a Tack-It.
- Text Color This option opens the Color dialog box. Select a color for the font. Only one color can be used at a time on a Tack-It
- Note Color This option opens a submenu from which to select the desired background color for the note.
- Delete This option deletes the Tack-It.
- Properties This option opens a message box indicating when the Tack-It was created and by whom, when it was last changed, and how it is linked.

Tack-Its are always on top, and they cannot be minimized or closed. They can be deleted or moved. To move the Tack-It, place the cursor near the top. Click and drag to the desired location. To change the size of a Tack-It, place the cursor near the right or lower side of the note. When the cursor changes to a sizing arrow configuration, click and drag to the desired proportions.

## Note Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notes and Messagesï¿½ ï¿½ ï¿½ )<<1}

### Information Field

The date and time the Tack-It was created, the author, when it was last changed (if ever), and the type of link used are indicated in this section.

# Bulletin Board

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notes and Messagesï¿½ ï¿½ ï¿½ )<<1}

## Company Name

The name of the registered owner of the TeleMagic installation appears in the top section. Notes cannot be added to this area.

## Bulletins

All notes are added in this area. To add a note or change the Bulletin Board's properties, right-click anywhere on the Bulletin Board. The Bulletin Board's pop-up menu will open.

## Bulletin Board Pop-Up Menu

The following options are available:

- Add Note Select this option to create a new note.
- Refresh Select this option to check for new postings.
- Line Up Notes Select this option to automatically organize the notes.
- Background This option opens a submenu from which to select the background color. When the background color is changed from the menu, it will only remain changed for the current session. To change the background permanently, it must be changed in the User Preferences dialog box.
- PreferencesThis option opens the User Preferences dialog box for the Bulletin Board.
- Close This option closes the Bulletin Board.

## Note

To move the note, place the cursor near the top. Click and drag to the desired location. To change the size of a note, place the cursor near the right or lower side of the note. When the cursor changes to a sizing arrow configuration, click and drag to the desired proportions.

## Note Pop-Up Menu

The notes used in the Bulletin Board are similar to Tack-Its. To open the Note pop-up menu, right-click on the note. The following options are available:

- Choose Font Select this option to open the Font Dialog box and set the font for the note. Only one font can be used on a Note.
- Text Color Select this option to open the Color dialog box and set the coler of the text for the note. All text on a note is the same color.
- Note Color This option opens a submenu from which to select the background color for the Note.
- Properties This option opens a message box indicating when the Note was created and by whom, and when it was last changed.
- Delete Select this option to delete the Note.

# User Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notes and Messagesï¿½ ï¿½ ï¿½ )<<1}

## Font

The currently selected default font is indicated in the non-editable field. To change the default font, click the ellipsis button. The Font dialog box will open and you can select the desired font, size, and style. Changing the default font does not affect any existing notes. The default can be overridden on individual notes.

## Color

You can set the default text and background colors for your notes. Select which default you want to set from the drop-down list. Click the ellipsis button to open a Color dialog box and select the desired color. Changing the default color for either text or background does not affect existing notes. The default can be overridden on individual notes.

## Show Scroll Bars

Mark this checkbox to display scroll bars on notes. If scroll bars are not displayed, scrolling is accomplished by using the arrow keys.

## Width

Set the width of new notes in this field by either entering the value or using the spinner buttons. The size is expressed in pixels. Changing this does not affect existing notes.

## Height

Set the height of new notes in this field by either entering the value or using the spinner buttons. The size is expressed in pixels. Changing this does not affect existing notes.

## Background

Select the desired color from the drop-down list. Changing this takes effect immediately and will remain the background color until changed.

## Refresh Rate

Set how often, in minutes, the Bulletin Board should check for new postings. If set to zero, you will need to manually refresh the bulletin board to view new messages from other users.

## Sample

This area displays a partial view of the Bulletin Board with a note. Use this display to see how the Bulletin Board will appear with your current changes.

# Message Taker

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Notes and Messagesï¿½ ï¿½ ï¿½ )<<1}

The Message Taker has two modes; edit and non-edit. If you open the Message taker and have no messages waiting, it will be in edit mode (ready to start a new message). If you have messages waiting, it will be in non-edit mode (displaying a message). The differences in the two modes is what set of controls are available in the row of controls just above the Message Taker status line, and you cannot edit the message unless you are in edit mode. Most fields are optional. Only the From field must be filled in. The Date and Time fields will be filled in automatically, if blank, when the message is sent.

### For

Select the recipient of the message from the drop-down list. If you are not in edit mode, this field will indicate the intended recipient of the message.

### Date

In edit mode, the current date will be entered in this field automatically. You can manually enter another date, or click the date picker icon and choose another date. If this field is blank when the message is sent, it will be filled in with the current date. In non-edit mode, this field will contain the date that the message was written, or whatever date the originator entered.

### Time

In edit mode, the current time when the message taker was opened will be entered in this field by default. You can manually enter another time, or click the time picker icon and choose another time. If this field is blank when the message is sent, it will be filled in with the current time. In non-edit mode, this field will contain the time the message was written, or whatever time the originator entered.

### From

Enter the name of the person calling if in edit mode. If in non-edit mode, the name of the caller is indicated in this field. This field must be filled in to send the message.

### Company

Enter the name of the company that the caller represents in this field if in edit mode. If in non-edit mode, the name of the company represented by the caller is indicated in this field.

### Phone

Enter the caller’s phone number if in edit mode. If in non-edit mode, the caller’s phone number will be indicated in this field.

### Ext.

Enter the caller’s extension if in edit mode. If in non-edit mode, the caller’s extension will be indicated in this field.

### Regarding

Enter the purpose or subject of the call if in edit mode. If in non-edit mode, the reason for the call will be indicated in this field.

### Message
Enter the message left by the caller if in edit mode. If in non-edit mode, the message left by the caller will be displayed in this field.

### Checkboxes
If in edit mode, mark any of these checkboxes that apply. If in non-edit mode, any checkboxes marked by the originator will be indicated. The checkboxes have no effect on how the message is sent.

## Edit Controls

The following controls are only available in edit mode:

### Notify
Mark this checkbox if you want the recipient to receive a pop-up notice that they have a new message. The message will close as soon as the recipient clicks anywhere on the TeleMagic screen.

### Password Protect
Mark this checkbox to require that the recipient's password be entered before the message will be displayed. The TeleMagic password is used. The recipient will be queried for their password when they attempt to open the Message Taker. If they have no password, they should leave the response field blank. If the wrong password is entered, they will still be able to view their non-password protected messages.

### Page
This checkbox is only available if the recipient has pager information entered in User Preferences. Mark this checkbox to notify the recipient of the new message by wireless message.

### Link to Contact
Click this button to open the Contact Link dialog box and link the message to a contact record. The message can be linked to any record accessible to the message originator.

### Send
Click this button to send the message.

### Cancel
Click this button to go to non-edit mode.

## Browse Controls

The following controls are only available in non-edit mode:

### Linked to Contact
Click this button to open a display of the linked record's key information. This button is only available if the current message is linked.

### Create New Message
Click this button to switch to edit mode and create a new message.

### Remove Current Message
Click this button to delete the current message.

### Browse list of messages
Click this button to open a browse view of all messages.

### Go to previous message
Click this button to view the previous message.

### Go to next message
Click this button to view the next message.

## Status Line
The number of messages you have waiting is indicated here.

## Close
Click this button to exit the Message Taker.

# Report Menu Configuration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Menu Optionsï¿½ ï¿½ ï¿½ )<<1}

## Custom Reports

This field contains a list of all available custom reports. Select the report that you want to add to the menu from this list.

## Quick Lists

This field contains a list of all available Quick Lists. Select the quick list that you want to add to the menu from this list.

## Separator

Click this button to add a separator to the Report Menu. This button becomes available when you have selected an item in the Report Menu field.

## Add

Click this button to add the selected item to the menu. This button becomes available when an item in either the Custom Reports field or the Quick Lists field has been selected.

## Remove

Click this button to remove the selected item from the Report Menu. This button becomes available when an item has been selected in the Report Menu field.

# (Calendar View) Report of Priority (Priority Choices)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Reportsï¿½ ï¿½ ï¿½ )<<1}

### Report Format

Select the radio button corresponding to the calendar view on which you wish to report, either Day, Week, or Month at a Time..

### Include

Mark the checkbox(es) to include either activities, To-Dos, or both in the report. Mark whether to include due items, complete items, or both. You must mark either Due or Completed.

## Date Range

### From:

Enter the earliest date to be included in the report. You can enter the date directly, or click the date picker icon to open a calendar and choose the date from there.

### To:

Enter the latest date to be included in the report. You can enter the date directly, or click the date picker icon to open a calendar and choose the date from there.

## Time Range

The time range determines the activities that will be included in the report for each day. For example, if you only wanted your report to include activities that occurred in the morning, you would probably choose a time range from 7:00a to 12:00p. If you choose this, then activities that occurred in the mornings of each day selected in the Date Range section will be included in the report

### From:

Enter the earliest activity start time to be included in the report. Activities with earlier start times will not be included, even if the activity is scheduled to end after the time indicated in this field.

### To:

Enter the latest activity start time to be included in the report. Activities that begin before this time will be included even if they are not scheduled to end until after the time in this field.

### Priority

Mark the checkbox(es) for the priorities to be included in the report. At least one priority must be selected. You can select any combination of one or more priorities.

### User

Select the user on whom to report from the drop-down list. You will only be able to report on a user if you have access to their calendar.

### Resolution

Enter the size, in minutes, of the time slots to be used in the report. You can enter the time directly, or use the spinner arrows.

### Type

Enter the type of activities and To-Dos to be included in the report. You can enter the type directly, or open the List Box and choose the type. Only activities and To-Dos of the type indicated will be included.

### Extended Activities

Mark the checkbox(es) corresponding the extended activities to be included in the report. You can mark either personal, global, both, or neither.

### Detail Page

Mark this checkbox to include the detail page in the report. This option is only available for the Month at a Time view.

### View

Click this button to open the Report Preview dialog box and preview the report.

### Print

Click this button to print the report

### Fax

Click this button to open the Report Description dialog box. Once the description has been entered, the report will be added to the list of standard reports and can be faxed.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Reports)<<1} TeleMagic Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

# Print Preview

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Reportsï¿½ ï¿½ ï¿½ )<<1}

The controls specific to the preview screen are located on the Print Preview toolbar. This toolbar can be moved elsewhere on the screen.

### First Page

Click this button to display the first page in the report.

### Previous Page

Click this button to display the previous page.

### Go To Page

Click this button to open the Go To Page dialog box and select a specific page to display.

### Next Page

Click this button to display the next page.

### Last Page

Click this button to display the final page in the report.

### Zoom

Select a level of magnification from the drop-down list. If you select "Zoom" from the list, the report will be displayed in low magnification and your cursor will be replaced with the magnifier. Place the magnifier over the part of the report you want to zoom in on and click. The selected area of the report will be displayed at 100%.

### Close Preview

Click this button to close the Report Preview.

### Print Report

Click this button to print the report.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Accessing_the_Report_Generator_and_Starting_a_Report)<<1} Accessing the Report Generator and Starting a Report

# List Type

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

### Contact List

Click this button if the list should be a contact list. The Expression Builder will open.

### Activity List

Click this button if the list should be an activity list. The Expression Builder will open with a default expression offered. The default expression will display the due date and time, the user ID, and the description for the linked activity.

### Document List

Click this button if the list should be a document list. The Expression Builder will open with a default expression offered. The default expression will display the first 35 characters of the description, the date, user ID, and where the document is stored.

### E-mail List

Click this button if the list should be an E-mail list. The Expression Builder will open with a default expression offered. The default expression will display the date the message was received, the recipient, the sender, and the subject.

### Sales List

Click this button if the list should display linked Sales Forecasting information. The Expression Builder will open with a default expression offered. The default expression will display the description, type, product, and status of the forecast.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rollup_List_Properties)<<1} Screen Designer: Rollup List Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rollup_Tools)<<1} Screen Designer: Rollup Tools

## Grid Size

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Note the minimum screen size.

### Vertical Pixels

Enter the number of pixels between horizontal gridlines. You can enter the value directly, or use the spinner arrows.

### Horizontal Pixels

Enter the number of pixels between vertical gridlines. You can enter the value directly, or use the spinner arrows.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Gridlines)<<1} Screen Designer Gridlines

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Gridlines_and_Position_Indicator)<<1} Gridlines and Position Indicator in the Screen Designer

## Database Description (Usage) Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Contact Managerï¿½ ï¿½ ï¿½ )<<1}

### Memo Field

Enter the description of the database in this field. You can include any information that may be useful to those who will be using or maintaining the database.

### OK

Click this button to save changes and return to the Select Database dialog box.

# Custom Dialer Configuration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

### Com Port

Select the COM port to be used from the drop-down list.

### Baud Rate

Select the baud rate to be used for the dialing device from the drop-down list.

### Modem Initialization Command String

Enter the string which initializes your dialing device in this field, if required.

### Modem Dial Command String Prefix

Enter the command string required by your dialing device when dialing. The default value is ATD.

### Modem Hang Up Command String

Enter the command string required by your dialing device when terminating a call. The default value is ATH0. The asterisk indicates that this action is taken when the selection made in Release Modem After section.

### Modem Command String Terminator

Enter the expression required by your dialing device to indicate the end of each command string. The default value is chr(13).

### Release Modem After Dial Completion/Call Termination

This option allows you to control when the dialing device is released by TeleMagic. When using most devices, once dialing has been completed, TeleMagic no longer needs to remain connected to the device. Some phone systems, on the other hand, require that TeleMagic remain connected until the call is completed. If your device should be released as soon as the call has been successfully dialed, select `Dial Completion`. If your modem should be released when the call is terminated, select `Call Termination`. The asterisk indicates that when the selected event occurs, the string indicated in Modem Hang Up Command String will be sent to the dialing device.

> **Hint**
> If you are unsure which option to select, try choosing Dial Completion and make a test call. If you are able to complete the call without a problem, leave this setting. If the call gets cut off after successfully dialing, you should select Call Termination.

### More About…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.hlpï¿½DIALER_Dialer_Configuration_Options)<<1} Dialer Configuration Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

______154.BMP<JumpId(TM.hlpï¿½DIALER_Phone_Calls)<<1} Phone Calls

# DSS Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Rebuildï¿½ ï¿½ ï¿½ )<<1}

Data Synchronization Server uses several tables which should be rebuilt periodically. Note that the options available here differ from those available when rebuilding the server in DSS. You can select to rebuild any combination of the following tables:

- Site Table
- Transaction Table
- Received Packet List
- File Attachments
- Field Rules
- Scripts

All tables are rebuilt by default. Tables should only be excluded from rebuild for specific reasons, such as when directed by technical support.

# Import - Source File Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

### Tabs

Click the tab corresponding to the part of the import format you want to change.

### Import Name

The name of the format appears in this field and can be changed as necessary.

### Source File

This field shows the path and filename of the source file for the import. This can be edited directly if necessary. If this import format uses the `Relate separate database files for each level in TeleMagic` option, there will be a separate field for each level. The fields for levels 2 and 3 will be drop-down lists.

### Find

Click this button to open the Open dialog box and locate a new source file.

### Filter Source

The Expression used to limit which records are imported is displayed in this field. This cannot be edited directly. To edit the expression, you must open the Expression Builder (Click **Expression…**).

### Level 1 Parent Identifier / Level 1 Child Identifier / Level 2 Child Identifier / Level 3 Child Identifier

These fields are only present if the format uses the `Relate separate database files for each level in TeleMagic` option. Each contains the expression or field which uniquely identifies each record’s indicated relationship. Select new fields from the drop-down list, create or modify expressions by clicking the ellipsis button associated with the field to be changed.

### Expression…

Click this button to open the Expression Builder and create a new expression or modify the existing expression.

### Clear

Click this button to clear the existing expression.

# Import - Field Assignments

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

## Tabs

Click the tab corresponding to the part of the import format you want to change.

## Field Name

This column lists the names of the fields in the source database. Click on the column header to toggle between the field names and the prompts.

## Assigned Field

This column lists the fields in the target database that have been associated with fields in the source database. Click on the column header to toggle between field names and sample data.

## Expr

Click on the ellipsis button associated with each pair of source and target fields to open the expression builder and create an expression to limit what is imported into the field, or to edit already existing expressions.

### Warning!

If this import format imports directly from RCL fields in a TeleMagic for DOS database to RCL fields in the V4 database, dates used in the expression must follow specific formats. If the import is from V14.5, the format is YYYY MM DD. If the import is from earlier versions, the format is YY MM DD.

## Auto Assign

Click this button to automatically associate fields in the source database with their closest matches in the target database.

## Prev Sample / Next Sample

Click these buttons to scroll through the sample data displayed in the `Assigned Field` column. These buttons have no effect if sample data is not displayed.

# Import - TeleMagic DOS Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

### Tabs

Click the tab corresponding to the part of the import format you want to change.

### Include Activities

Mark this checkbox to include activities in the import. This checkbox must be marked for the remaining controls in this section to be available.

### Path to activity files

The path to the activity files is indicated in this field. This can be edited if required.

### Find…

Click this button to open the Select Directory dialog box and browse for the location of the activity files.

### Linked / Unlinked / All

Select the radio button indicating whether you want to import linked activities only, unlinked activities only, or all activities. This option applies only to V14 and higher.

### All Users / Individual Users

Select the radio button indicating whether you want to include personal activities for all users, or only selected users.

### Select Users

This button becomes available when `Individual Users` is selected. Click this button to open the Select Users dialog box and choose the users whose activities are to be included in the import.

### Include Call History File

Mark this checkbox to include the Call History file in the import. This checkbox must be marked for the remaining controls in this section to be available.

### Path to Call History file

The path to the Call History file is indicated in this field. This can be edited if necessary.

### Find…

Click this button to open the Select Directory dialog box and browse for the location of the Call History file.

### Create Activity from RCL

Mark this checkbox to create an Activity Manager activity based on RCL field information in the source database. This checkbox must be marked for the remaining controls in this section to be available.

### Recall Duration (Mins)

The duration for the activities to be created is indicated in this field. This field can be edited as required.

### User ID / Expression

Select the radio button which indicates whether the activities will be created for a particular user, or by different users using an expression. If an expression is used, it is indicated in the field just below these controls. This field cannot be edited. To edit the expression you must open the Expression Builder (click **Expression…**).

### Expression…

Click this button to open the Expression Builder and create a new expression to determine which users will receive imported activities, or edit the existing expression.

### Clear

Click this button to clear the expression used to identify which users should receive imported activities.

### From / To

The range of dates to be included in the import is indicated in these fields. This can be edited directly, or buy using the date pickers.

### Link Level

Select which level should be used for linking the incoming records.

### Assign Unmatched Activities To

The user who will receive activities that are not otherwise assigned is indicated in this field. Change this by selecting another user from the drop-down list.

### Include: Indexes / Filters / List Boxes

Mark any combination of these checkboxes to include the indicated items in the import.

# Import - General Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

## Tabs

Click the tab corresponding to the part of the import format you want to change.

## Single User (Faster) / Multi User

Select the radio button that indicates whether the import will be run with exclusive access to the target database. The Single User (exclusive) option is faster, but the Multi User option does not require exclusive access to the target database.

## During Import / Do not calculate fields

Select the radio button that indicates when you want to calculate fields. Calculating during the import will require more time for the import.

## During import / After import, during Rebuild

Select the radio button that indicates when indexes should be updated.

## Refresh status every _ seconds

When the import is being run, a status window will indicate the progress of the import. This field indicates how often, in seconds, that this indicator is updated. The more often this is updated, the slower the import will proceed.

## Always Update the Last Revision Field

Mark this checkbox to update the Last Revision Field with the date and time of the import.

## Stamp Notepad

Mark this checkbox to stamp the notepad of records in the target database with the date and time of the import. Add any additional text to be stamped in the memo field below this control.

# Import - Existing Record Check

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

### Tabs

Click the tab corresponding to the part of the import format you want to change.

### Create a New Record / Merge with Existing Record / Reject Incoming Record

Select the radio button that indicates the action you want taken when a duplicate record is being imported.

### How should TeleMagic look for duplicate records

Select the radio button that indicates how TeleMagic should determine that incoming records are duplicates. You can use all existing indexes with the `Check Duplicate` option selected, select one existing index, or create a custom index. These controls are only available if you have chosen some action other than `Create a New Record` from the options above. The `Use all existing indexes in TeleMagic used for "duplicate record checking"` is only available if there is an index in the target database which is set up for duplicate record checking.

### Level 1 / Level 2 / Level 3

Select the level that will be used for the duplicate record checking. These controls are only available if you have chosen to select a particular index for duplicate checking, or you are creating a custom index.

### Index drop-down list

Select the index to be used for duplicate record checking from the drop-down list. This control is only available if you have chosen to select a single existing index for duplicate checking.

### Temporary Index

The temporary index that is to be used for duplicate checking is shown in this field. This field cannot be edited. To create a new index or edit the existing one, you must open the Expression Builder (Click **Expression…**). This field is only available if you have chosen to create a temporary index to detect duplicates.

### Expression…

Click this button to open the Expression Builder and create a temporary index for detecting duplicate records during import. You can also create a new index if there is not one already. This control is only available if you have chosen to create a temporary index to detect duplicates.

### Clear

Click this button to delete the existing temporary index. This control is only available if you have chosen to create a temporary index to detect duplicates.

### Field Rules

If you are merging duplicate incoming records you can use field rules to determine how specific fields are merged. Highlight the field in the list on the left and choose the applicable rule from the drop-down list on the right.

# Import - Validation

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

### Tabs

Click the tab corresponding to the part of the import format you want to change.

### Action to be taken when validation fails

If you have validated fields in the target database, TeleMagic will check incoming records for compliance with the validation. Select the radio button that indicates the action to be taken when fields contain invalid data.

### Select a Memo Field…

There is a separate drop-down list for each level of the target database. For each level, you have the option of identifying a memo field in which rejected data will be stored. These controls are only available if you have chosen to `Import the records, but skip invalid fields`.

## Import - Activity Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importï¿½ ï¿½ ï¿½ )<<1}

### Tabs

Click the tab corresponding to the part of the import format you want to change.

### Include Which Activities

Select the radio button that indicates which activities should be imported.

### From / To

Enter a date range or cutoff dates for activities to be imported. If there is an entry in both fields, activities in that range will be imported. If only `From` has an entry, then activities after that date will be imported. If only `To` has an entry, activities prior to that date will be imported.

### Import Activities for All Users / Import Activities for Selected Users

Select the radio button that indicates which users should have activities imported.

### Add / Add All / Remove / Remove All

If you have chosen to import activities for selected users only, use these buttons to add users to and remove users from the list of selected users.

# Activity Manager - Calendar View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Calendarï¿½ ï¿½ ï¿½ )<<1}

By default this screen displays the To-Do view and the Day View. The Activity Manager can be reconfigured to suit your individual needs. You can display as many as 4 views at the same time. There are 5 views available:

## To-Do View

To-Dos are activities that need to be completed by a certain day, but not at any particular time. A To-Do may or may not have a priority. If a To-Do has a priority, it can be 1, 2, or 3. To-Dos normally appear on the To-Do view as soon as they are created, but they can be set to only appear when they are due. To-Dos that are not set to only appear when due are color-coded to indicate how far they are from the due date. On the day that the To-Do is due, it appears in red. The day before it is due, it appears in blue. Any number of days earlier, the To-Do is displayed in black. When a To-Do is overdue, it appears in red with the number of days overdue indicated to the right of the To-Do.

## Day View

The Day View displays a single day. The day is divided into periods whose length can be set in Activity Preferences. The default is 1 hour. Activity type is indicated by icons. If there is more than one activity in any period, a plus sign (+) will appear with the description of the first activity. Click on the plus sign to open a pop-up menu listing all of the activities for that period. Select the activity that you want to change or review from the menu.

## Week View

The Week View displays seven days, starting with the current day. Columns are days, and rows are periods whose lengths can be set in Activity Preferences (the default is 1 hour). As with the Day View, activity type is indicated for each activity by an icon. If there is more than one activity in any period, a plus sign (+) will appear with the description of the first activity. Click on the plus sign to open a pop-up menu listing all of the activities for that period. Select the activity that you want to change or review from the menu.

## Month View

The Month View displays thirty-five days. You can choose to set this display so that the entire month containing the day that is selected is displayed. If you choose this feature, days that are not in the same month as the currently selected day will appear in gray. Each day on this view will indicate how many activities and To-Dos are scheduled for that day. Extended activities are indicated on this view by colored bars that extend across all of the days in which the extended activity is to occur. Double-click on the day containing an activity or To-Do that you want to review or edit. If there is more than one activity or To-Do for that day, a list will open from which to select the activity that interests you.

## Detail

This view displays information about all activities and To-Dos scheduled for the currently highlighted period (when a period on the Week or Day View is selected) or day (when a day on the Month View is selected).

You can change the displayed date or date range by double-clicking near the top of any view except detail. This will open the Select Date dialog box where you can enter or browse for the desired date. If you have selected Synchronize All Views (from the Open View Layout Tools toolbar), all displayed views will be changed to include the date or date range selected of the view where you next perform some action.

You can open the Activity dialog box and add a new activity by double-clicking on the period where you want to schedule the activity. If there is already an activity in that period, click on the period and then right-click to open a pop-up menu. If you double-click on a day in the Month View, the Select a Type dialog box will open. Choose what sort of activity you want to schedule from this dialog and click **Select**. You can open the To-Do dialog box and add a new To-Do by double-clicking anywhere on the To-Do view.

You can display more than one copy of each view. To view different dates or ranges of dates, make sure that the Synchronize All Views button is not selected.

You can reschedule activities by dragging and dropping. You can drag from one View to another, even if they are of different types. You cannot drag activities from the Month View, but you can drop them there from other views.

Most functions on this screen can be accomplished using the tools on the Activity Manager Toolbar, and the Open View Layout Tools toolbar. Tools on the Activity Manager Toolbar are used to create, edit, and review activities and To-Dos on your calendar and the calendars of others who have granted you permission. The tools on the Open View Layout Tools toolbar are used to configure your calendar display and navigate through the different views. To see what any of the tools on these toolbars are, hold your cursor over them momentarily and a ToolTip will open with the name of the tool or a brief description.

## Select a Type

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Calendarï¿½ ï¿½ ï¿½ )<<1}

### Activity / To-Do / Extended Activity

Select the radio button that corresponds to the type of activity that you want to add.

### Select

Click this button when you have chosen the type of activity that you want to add.

# Custom Merge Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

## List of Custom Merge Fields

This field lists all Custom Merge Fields for the current document.

## New Field

Click this button to open the Add a Merge Field dialog Box.

## Modify Field

Click this button to open the Change a Merge Field dialog box and edit the selected Custom Merge Field.

## Remove Field

Click this button to delete the selected Custom Merge Field.

# Add a Merge Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

### Field Name

Enter the name of the new Custom Merge Field in this field.

### This is a memo field

Mark this checkbox if the new Custom Merge Field is to be a memo field.

## Change a Merge Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

### Field Name

The name of the Custom Merge Field appears in this field. Edit as necessary.

### This is a memo field

If this checkbox is marked, the Custom Merge Field will be a memo field.

# Sales Forecasting Rollup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

## List of Forecasts

This field is a complete list of sales forecasts that are linked to the current contact.

## Edit

Click this button to open the Sales Forecasting dialog box and edit the selected sales forecast.

# TeleMagic E-mail

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(E-mailï¿½ ï¿½ ï¿½
)<<1}

## E-mail List

All e-mail that is linked to the current contact is listed in this field.

## View

Click this button to read the selected message.

## Delete

Click this button to delete the selected message.

# Availability

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Calendarï¿½ ï¿½ ï¿½ )<<1}

## Between Dates

Enter the range of dates to be checked for availability in the two date fields. The upper date is the start date, the lower date is the end date. You can either enter the dates directly, or you can click the date picker icons and use the Select Date dialog box to choose the start and end dates.

## Between Times

Enter the range of times to be checked for availability in the two time fields. The upper field is the start time, and the lower field is the end time. You can either enter the times directly, or you can click the Time Picker icons and use the Select Time dialog box to choose the start and end time.

## View only available time slots

Mark this checkbox to limit the report of available time slots to those that are available.

## Search

Click this button to commence the search for available time slots.

## Available Time Slots

After the **Search** button has been clicked, the time and date range specified will be displayed. If you did not mark the View only available time slots checkbox, open time slots will be indicated in green. Slots that already have scheduled activities are indicated in red. If you click in a time slot, it will display in reverse color. When a time slot that is not available is selected it will appear green, but **No** will be displayed in the slot to prevent confusion.

# Import Formats

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## List of Available Formats

All available formats are listed in this field. Select a format by clicking on it.

## Run

Click this button to run the selected import format.

## Close

Click this button to close the Import Formats dialog box.

## Add

Click this button to start the TeleMagic Import Wizard and create a new import format.

## Change

Click this button to open the Import dialog box and edit the selected import format.

## Delete

Click this button to delete the selected import format.

## Copy

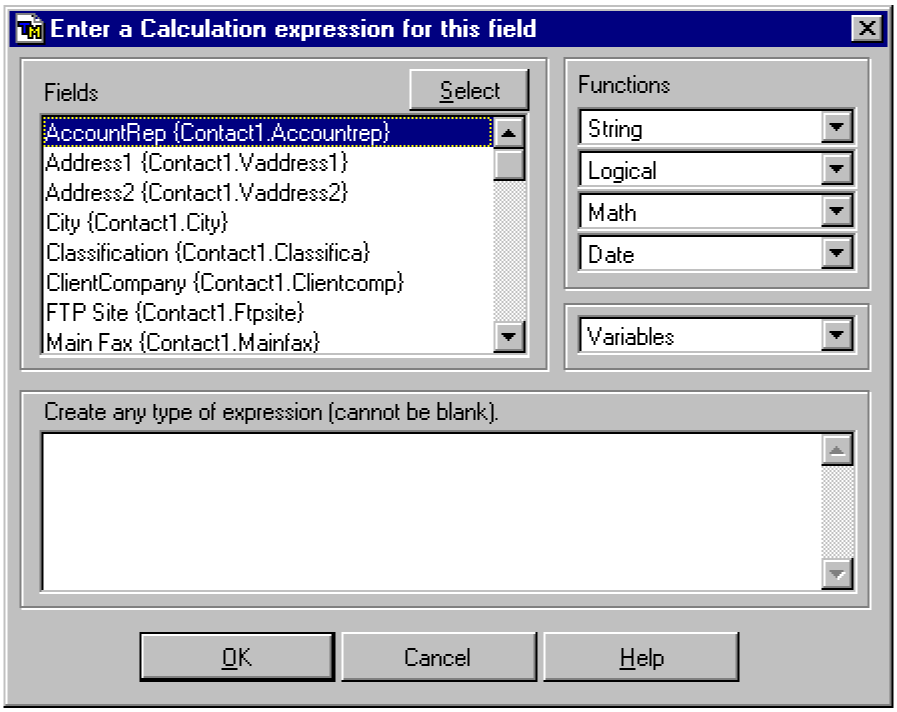
Click this button to make a copy of the selected import format. By default the copy will be named “Copy of <original format name>”. You can change the name by selecting the copy and clicking **Change**. The name is on the Source File page of the Import dialog box.

# Expression Builder

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½ )<<1}

The Expression Builder is a dialog box that appears whenever you need an expression to complete a task. Expressions are used to define field defaults, roll-up fields, and calculated fields; set up filters, indexes, and reports, and wherever you need TeleMagic to make a decision about which data to use.

The standard Expression Builder dialog box is illustrated here:




**The Expression Builder Dialog Box**

- 

The Expression Builder allows you to create expressions that, when evaluated, generate a value of Character, Numeric, Logical or Date type. An expression can be as simple as a field name, a single variable or a number, or it can be very complex. In general, expressions are formed with the following elements:

- Field names
- Memory variables
- Constants (or literals)
- Functions and operators

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Expression_Builder_Dialog_Box_Overview)<<1}

Expression Builder Dialog Box Overview

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Functions_Overview_by_Type)<<1} Functions Overview by Type

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½APPEND_A_Some_Examples_of_Common_Expressions)<<1} Examples of Common Expressions

## Select Installation Directory

### Select the directory you would like to install to:

The directory that will be the location of the node installation is indicated in this field. You can change it directly, or click the **Find** button and search for the location from the Select Directory dialog box.

### Find

Click this button to open the Select Directory dialog box and browse for the installation directory.

# Select Directory

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Nodeï¿½ ï¿½ ï¿½ )<<1}

## Select a directory tree view

This field is a tree view of the directory structure of the selected drive. Folders with plus signs (+) contain additional folders. Click on the plus sign to open the folder and display the folders that it contains. When you open a folder, the plus sign will change to a minus sign (-). Click the minus sign to close the folder.

## Drive

Select the drive that you want to browse from this drop-down list.

## Select

Click this button to choose the selected folder and close the Select Directory dialog box.

# Spell Checker Dictionary

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Spell Checkerï¿½ ï¿½ ï¿½ )<<1}

## List of Words

Any words that have been added to your custom dictionary are listed in this field.

## Add

Click this button to open the Edit Dictionary dialog box and add a new word to your custom dictionary.

## Edit

Click this button to open the Edit Dictionary dialog box and change the selected word in your custom dictionary.

## Remove

Click this button to delete the selected word from your custom dictionary.

## Edit Dictionary

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Spell Checkerï¿½ ï¿½ ï¿½ )<<1}

### Enter the word you would like to add: / Modify the Word:

Enter the new word exactly as it should be spelled, or change the existing word. The Spell Checker is case-sensitive; if a word can be spelled with either upper or lower-case characters, there should be a separate entry for each.

## Contact Link

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Linking Contactsï¿½ ï¿½ ï¿½ )<<1}

### Contact Information

If the message is linked to a contact, information related to the contact will be displayed in this field.

### No Link / Current Contact / Other Contact

Select the radio button that indicates which contact the message should be linked to.

### Search my contacts for:

Enter the search criterion in this field. The criterion must be located in a field which is included as the first item in an index’s expression.

### Search

Click this button to begin searching for the contact.

### Advanced Search

Click this button to open the Advanced Contact Search dialog box.

### Browse Contacts

Click this button to open the Select a Contact dialog box and browse for the contact.

# Phone Calls

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½DIALERX_Hint_for_Phone_Calls)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

Anyone who uses the telephone to communicate with contacts and clients on a regular basis will find the TeleMagic Dialer indispensable. The Dialer allows you to truly integrate your contact records with your phone, dialing from TeleMagic, keeping notes on your conversations in the contact records, and creating completed activities based on phone activity.

While using the TeleMagic Dialer you can make an outgoing call from either the Contact Manager or the Activity Manager; during the course of the call you are free to move about in the program as necessary.

When you conclude a call, TeleMagic will automatically update your call tracking system.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

## Dialer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic can automatically dial contacts through your telephone using a modem or serial dialing device. It requires you to set up the program, and Microsoft Windows, to “talk” to your telephone or telephone system. The program will then easily dial your telephone so you do not have to.

If you are sharing a single line voice telephone line with a modem or fax/modem installed in your own computer, it is very simple to set up a quick way to phone your customers, clients and contacts. You can have the computer dial the phone; once a connection is established, you pick up the handset and press any key on the computer.

Before Setup
Dialer Configuration Options
North American Numbering Plan

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

## Before Dialer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

Before performing setup, you need to be aware of the following special situations and how to deal with them:

**WARNING!**
If you are setting up a new modem for your computer, and you have a sophisticated telephone system, check with an expert before plugging your modem into a telephone socket. If you plug it into the wrong place, you could damage your computer, your new modem, your telephone, your telephone system, or even your computer network. Even though a plug may look right, it may be the wrong kind.

- If you are setting up a shared copy of TeleMagic for use by multiple users, all of whom will use the same dialing scheme, set all the TeleMagic options for the Dialer *before* installing each individual user account. Then, assuming that you are using a "master user" scheme to create users by copying them from a master template, the same dialer preferences will be copied to all users. (See the instructions: *To Create a Master Template User* under the heading *Step 7: Add Users to TeleMagic* in the *Multi-User Installation* section of the *System Administrator Guide*.)

- If you are using a serial dialer device (other than a modem), or a special interface for PBX or Centrex telephones, the setup procedure may be slightly more complex. We suggest that you contact your telecommunications support personnel for guidance on this matter.

- If you are using a modem pool, a communications server, such as Novell's NetWare Connect, NACS/NASI, or an INT 14 modem interface, you must contact your network administrator or reseller for assistance in connecting them to your phone system.

- If you have a serial dialing device that is not Hayes-compatible (that is, it does not follow the standard AT command set as used by modems built by Hayes or workalikes) you will need to set the Advanced options for its particular setup information. Contact your telecommunications professional for more information.

- If your telephone system requires an accounting code to be entered after a long distance number is dialed, you may have to dial this code manually. It is possible that you can have it as a dialer suffix; contact your telecommunications professional for more information.

- Ensure that your modem is configured for the correct speed before attempting to use or install it. These parameters are changed with the Device Manager tab under System Properties in the Control Panel, and are documented in the Windows 95 online help. Make sure that the port is not set for a speed faster than the modem can handle.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Configuration_Options)<<1} Dialer Configuration Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_North_American_Numbering_Plan)<<1} North American Numbering Plan
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Dialer Configuration Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

Dialer configuration is set up using Dialer preferences. (For information on the other preference sets available at the Preferences screen, see the Setting Preferences topic.)

Your Dialer may already have been configured by your System Administrator if you are using TeleMagic in a multi-user environment.

## To Configure the Dialer:

1. From the **Options** menu, select **Preferences**.

   The Preferences screen will open.

2. Click the **Dialer** tab.

   The Dialer page will open.

3. Make changes to this screen following guidelines given in the topics below.

Local Area Code
Dialer Prefix
Prefix for Local Call
Prefix for Long Distance Call
Prefix Override Character
Dialer Suffix
Zoom Dial
Create Activity
Insert Notes into Notepad
Tone or Pulse

4. When you are done making changes for this user's Dialer setup, click **OK** to exit the Preferences screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Before_Setup)<<1} Before Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_North_American_Numbering_Plan)<<1} North American Numbering Plan
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# North American Numbering Plan

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

If your company is not located in North America, this option should be ignored. There are also some areas in North America that have not yet implemented the North American Numbering Plan; TeleMagic users in those areas may ignore these instructions.

One of the basic premises when dialing in the past has been that all numbers which have the same area code as your phone are truly “local” numbers; and that all numbers with different area codes are long distance.

Because of the increasing amount of numbers for fax, cellular, and other communication devices, changes have been incorporated into the North American Numbering Plan. This is resulting in new and different area codes, multiple area codes for the same region (all of which are considered local), and numbers within the “local” area code which are considered long distance. As a result of NANP revisions, it is quite possible that a user might:

Dial a different area code even though the call is local.

Dial a number with the same area code even though the call is considered long distance.

Dial 10 digits (area code number) for a local call with the same area code.

Have some other unusual dialing pattern.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Using_NANP)<<1} NANP Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Configuration_Options)<<1} Dialer Configuration Options

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Before_Setup)<<1} Before Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Using NANP

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

NANP Setup is a global setting. Any changes made to your NANP Setup will be applied to all users and all databases, both for dialing and for faxing. If you are not a Supervisor user, you will not be able to access NANP Setup.

## To Set Up NANP

1. Compile a list of any numbers that have an unusual dialing pattern. The standard support in TeleMagic assumes that long distance numbers will be dialed with the long distance prefix entered in the Dialer preference's `Prefix for Long Distance Call` field (usually a 1), followed by the area code, followed by the exchange (the first 3 numbers after the area code), followed by the number (e.g. 1-123-555-7890); and that local numbers will be dialed with just the exchange and the number (e.g. 555-7890). Any exceptions to this should be included in this list.

2. From the **Options** menu, select **Maintenance**, **NANP**.

   The North American Numbering Plan dialog box will open.

3. Click **Add**.

   The Add NANP Record dialog box will open.

4. In the `Area Code:` field, enter the first area code on your list. If all numbers within that area code use the same settings, skip to step 8.

5. In the `Exchange:` field, enter the exchange (the three numbers following the area code).

6. If there are several exchanges in an area code that require the same dialing pattern, use the `Through` field to enter a range of numbers. Enter the first number in the range in the `Exchange:` field and the last number in the `Through` field. (If there are exceptions within this range, see the NANP Tips topic for information on creating sub-sets of ranges.)

7. Use the `Dialer Formatting` radio buttons using the following guidelines:

   - Select `Use No Prefix` if you do not want a local or long distance prefix dialed. (This will not affect your dialer prefix used to access an outside line. See step 11 if you want to control your dialer prefix.)
   - Select `Use Local Prefix` if you want TeleMagic to reference the `Prefix for Local Call`

field in Dialer preferences when dialing this number. (The `Prefix for Local Call` field should contain any number that should precede a local call, but that should not be used with a long distance call.)

- Select `Use LD Prefix` if you want TeleMagic to reference the `Prefix for Long Distance Call` field in Dialer preferences when dialing this number. (The `Prefix for Long Distance Call` field should contain any number that should precede a long distance number, but that should not be used with a local number. In North America, the prefix for long distance calls is generally 1.)

8. Mark the `Use Area Code` check box if you would like TeleMagic to dial the area code when dialing this number. Leave it unmarked if the area code should not be dialed.

9. Mark the `Use Dialer Prefix` check box if you would like TeleMagic to use the `Dialer Prefix` from Dialer preferences. Unmark it if this prefix should not be dialed. (This only affects the number needed to get an outside line. It will not affect whether TeleMagic dials a local or long distance prefix. See step 7 for more on these options.)

10. Mark the `Use Dialer Suffix` check box if you would like TeleMagic to use the `Dialer Suffix` from Dialer preferences. Unmark it if the suffix should not be used.

11. Click **OK** to save the entry and return to the North American Numbering Plan Setup selection box.

**or** Click **Cancel** to return to the North American Numbering Plan Setup selection box without saving the entry.

12. Repeat steps 5 through 11 for each number on your list.

13. When you have finished entering all numbers, click **Close** to close the North American Numbering Plan Setup selection box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_NANP_Tips)<<1} NANP Tips

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_To_Edit_NANP_Settings)<<1} To Edit NANP Settings:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_To_Remove_NANP_Settings)<<1} To Remove NANP Settings:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# To Edit NANP Settings:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **NANP**.

   The North American Numbering Plan Setup dialog box will open.

2. Highlight the entry in the North American Numbering Plan selection box and click **Change**.

   The Change NANP Record dialog box will open where you can adjust your settings. (If you are unclear on the options available on this dialog box, see the Using NANP topic.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Using_NANP)<<1} NANP Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_NANP_Tips)<<1} NANP Tips
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

## To Remove NANP Settings:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Maintenance**, **NANP**.

   The North American Numbering Plan Setup dialog box will open.

2. Highlight the entry in the North American Numbering Plan selection box and click **Delete**.

   A pop-up will appear asking you to confirm your decision to delete.

3. Click **Yes** and the entry will be deleted.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Using_NANP)<<1} NANP Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_NANP_Tips)<<1} NANP Tips

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

## NANP Tips

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

Use the following guidelines when selecting your `Dialer Formatting` settings in the Add NANP record dialog box:

### Local number, prefix optional, no area code:

If you are setting up a truly local number (one for which you only need to dial seven digits, without the long distance prefix and the area code), select the `Use No Prefix` or the `Use Local Prefix` radio button (depending on whether your phone system requires a local prefix) and leave the `Use Area Code` check box unmarked. (This is only required for local numbers that are in an area code other than what is entered in the `Local Area Code` field in Dialer preferences.)

### Long distance, with area code, without prefix:

If you are setting up a long distance number which requires the area code, but does not require the long distance prefix, select the `Use No Prefix` radio button and mark the `Use Area Code` check box.

### Long distance, without area code, with prefix:

If you are setting up a long distance number which requires the long distance prefix, but does not require the area code, select the `Use LD Prefix` radio button, and unmark the `Use Area Code` check box.

### Long distance, with area code and prefix:

If you are setting up a long distance number which requires the long distance prefix and the area code, select the `Use LD Prefix` radio button, and mark the `Use Area Code` check box. (This is only required if the long distance number is in the area code entered in the `Local Area Code` field in Dialer preferences.)

### Sub-sets of ranges:

You may have created settings for a range of area codes and exchanges, but find that there are a few numbers within that range which require different settings. To save you time in NANP setup, TeleMagic allows you to create sub-sets of any range of numbers and use different settings for those sub-sets. A sub-set can be anything from a smaller range of numbers within the larger range, to a single entry. (Be aware that the sub-set must be contained within the original range.) You can create multiple sub-sets, or even break the sub-sets down into smaller sub-sets.

### Order of precedence:

When TeleMagic prepares to dial a number, it will check the NANP table first for a single area code with exchange. If that is not found, it will look for the number in a range. If the number belongs to more than one range, TeleMagic will use the settings for the smallest range. If there is not a range assigned for the exchange, TeleMagic will look for the area code without an exchange. If this is not found, TeleMagic will look at the `Local Area Code` field in Dialer preferences. If the area code does not match this preference, TeleMagic will dial it as a standard long distance number.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
______154.BMP<JumpId(TM.HLPï¿½DIALER_Using_NANP)<<1} NANP Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
______154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
______154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
______154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Dialing Outgoing Calls

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

## To Make an Outgoing Call:

1. From the Contact Manager, go to the record for the contact you want to call. (If you do not have a contact record for the person you want to call, create one.)

**or** From the Activity Manager, select an activity that is linked to the contact you want to call. (See the Associating To-Dos and Scheduled Activities to Contact Records topic for more information on linking activities to contact records.)

2. From the **Office** menu, select **Dial**, or press ALT+D.

**or** If you are dialing from the Contact Manager, click the phone icon beside the number you want to dial.

The Dialer selection box will open. It will display all phone numbers for the contact you have displayed (or to whom your activity is linked).

3. Highlight the phone number you want to call, and choose **Dial**.

If you have the Dialer preferences `Com Port` field set to `None` for no modem, the Call Notes dialog box will open when you choose **Dial**. (If you have no modem set up, you must dial the phone manually.)

**or** If you have set TeleMagic up to dial the phone for you, there will be a brief pause as TeleMagic dials the phone, then you will be instructed to pick up the phone and press any key.

4. Press any key on the keyboard to acknowledge that you have picked up the phone and are ready to proceed with the call.

The Call Notes dialog box will open.

The `Description` will default `Call to` and the contact's name. The `Call Result (Status)` will initially default to `Completed` and the `Complete Activity` check box will default to marked. The `Type` will initially default to `Call`.

The contact name will be highlighted in the `Description` field. As the call progresses, the call duration will appear at the bottom left-hand corner of the screen:

Call in progress - duration: 0:02:07

5. If necessary, enter a new description. (The description will appear in the associated activity in your Activity Manager and any related contact history field.)

   The `Call Result (Status)`, `Type`, and `Complete Activity` fields will be used if you are creating an activity based on the call (i.e., if you have `Create Activity` in selected Dialer preferences.)

6. If necessary, edit the information in the `Call Result (Status)` field or press F2 to access the list box that is used in the `Status` field in the Activity Manager.

7. If necessary, edit the Activity `Type` or press F2 to access the list box that is used in the `Type` field in the Activity Manager.

- 8. If you do not complete the call, unmark the `Complete Activity` check box.

- 9. Keep notes of your conversation for future reference in the `Comments` field. These will be recorded in the `Comments` box of the scheduled activity in the Activity Manager and in the contact's notepad in the Contact Manager (based on your preference settings). Select the **Stamp** button to place the standard notepad stamp into the `Comments` field (date, time, and User ID). Select the **Paste Contact Info.** button to place key field information from the associated contact into the `Comments` field.

10. To access the Contact Manager, click **Contact**.

    The Call Notes dialog box will be placed in the background and you will be able to move through the Contact and/or Activity Manager in the usual fashion.

- 11. When you want to return to the Call Notes dialog box, press ALT+D or select **Call Notes** from the **Office** menu. (**Call Notes** replaces **Dial** in the Office menu when a call is in progress.)

    If you are using the `Create Activity` feature to create an activity based on your call, the call status will appear in the `Call Result (Status)` field in the new activity.

12. If necessary, edit the call status in the `Call Result (Status)` field or press F2 for a list box.

- 13. If you are not recording call notes, click **Terminate**. Your modem will disconnect from the call.

**or** If you are recording call notes, you have three options when completing the call:

- **Terminate** will stop the call duration timer. A duration display will appear in the right-hand corner displaying the length of the call. You will remain at the Call Notes dialog box where you can make any additional notes. (When you are ready to exit, click **Save** or **Set Recall**. Alternatively, you can click **Cancel** to exit without saving the call.)
- **Save** will stop the call duration timer, save the call, and exit the Call Notes dialog box.
- **Set Recall** will terminate and save the call and open a Set Recall dialog box. See Scheduling a Recall for instructions on scheduling a recall.

If you have a Last Call field, TeleMagic will update it with the call date and time.

If you have the notepad field defined in Key Fields and have `Insert Notes into Notepad` selected in Dialer preferences, TeleMagic will update the designated field with the date and time of the call, your user ID, whether the call was incoming or outgoing, the duration of the call, the call status, call description, and your call notes.

If you have dialed from the Contact Manager and have `Create Activity` selected in Dialer preferences, TeleMagic will also add a scheduled activity to your calendar with the call date, time, description, duration, and status entered into the appropriate fields, and call notes entered into the `Comment` box. In addition, if you have a `Contact History` rollup list, TeleMagic will update it to show the call.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Making_Calls_Using_the_Manual_Dial_Feature)<<1} Making Calls Using the Manual Dial Feature

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Placing_Calls_from_the_Pending_Activity_List)<<1} Placing Calls from the Pending Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_To_Place_a_Series_of_Calls_Using_Zoom_Dial)<<1} To Place a Series of Calls Using Zoom Dial

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Making Calls Using the Manual Dial Feature

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

There may be times when you need to reach a contact who is away from the office, or at another temporary number. While it is possible to add the number to the contact's record and delete it later, it may be more efficient to use the manual dial feature.

## To Use the Manual Dial Feature:

1. From the **Office** menu, select **Manual Dial**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|procedn.BMP<Jumpld(TM.HLP>thirdï¿½ PREFS_Toolbar_Configuration)<<1}

**or**

Click on the Manual Dial button  on the User Toolbar. If this button does not appear on your toolbar, and you would like to add it, follow the procedure accessed from the button to the left of this step.

The Dialer selection box will open.

2. Choose **Manual Dial**.

   The Manual Dial dialog box will open.

3. Use this dialog box as you would a touch tone phone, remembering to dial the entire number, including any number you need to access an outside line. (Numbers entered in Manual Dial will not reference your Dialer preference settings. They will be dialed exactly as entered.)   Dial either by pointing at the number and clicking with the mouse, or by entering the numbers on your keyboard. As you enter numbers, they will appear in the display window at the top of the dialog box.

   - Use the asterisk (*****) and pound (**#**) signs exactly as you would on your telephone keypad.
   - Use the comma (**,**) to create a two second pause in dialing, such as after the dialer prefix, or before an extension.
   - Use the **Back** button to erase the digit you have just entered.
   - The hot keys on this dialog box operate without using the ALT key.

4. Click **Dial**. The number will be dialed exactly as you entered it.

   There will be a brief pause as TeleMagic dials the phone, then you will be instructed to pick up the phone and press any key.

5. Press any key on the keyboard to acknowledge that you have picked up the phone and are ready to proceed with the call.

   The **Dial** selection in the Office menu will change to **Call Notes** and the Call Notes dialog box will open. The call will be associated with the current contact in the Contact Manager.

6. Follow steps 5 through 13 under Dialing Outgoing Calls for instructions on completing this dialog box and terminating the call.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Placing_Calls_from_the_Pending_Activity_List)<<1}
Placing Calls from the Pending Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_To_Place_a_Series_of_Calls_Using_Zoom_Dial)<<1}
To Place a Series of Calls Using Zoom Dial

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Answering_the_Phone)<<1} Answering the Phone

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Answering the Phone

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

You can record call notes and update Activity Manager entries when answering the phone, just as you do when dialing out.

## To Answer the Phone and Record Call Notes:

1. From the toolbar, click the Answer the Phone icon.

   **or**

   Go to the record of the contact who is calling and click **Dial**.

   The Dialer selection box will open.

2. Choose **Answer phone**.

   The call duration timer will start and the Call Notes dialog box will open.

   As the call progresses, the call duration will appear at the bottom left-hand corner of the screen. The `Call Result (Status)` will initially default to `Completed` and the `Complete Activity` check box will default to marked. The `Type` will initially default to `Call`.

   TeleMagic will fill in the `Description` with `Call from` and the current contact name. The contact's name will be highlighted.

3. Type in the name of the person calling if it is not the current contact, or enter a different call description.

   The `Call Result (Status)`, `Type`, and `Complete Activity` fields will be used if you are creating an activity based on the call (i.e., if you have `create Activity` selected in Dialer preferences.)

4. If necessary, edit the information in the `Call Result (Status)` field or press F2 to access the list box that is used in the `Status` field in the Activity Manager.

5. If necessary, edit the Activity `Type` or press F2 to access the list box that is used in the `Type` field in the Activity Manager.

6. If you do not complete the call, unmark the `Complete Activity` check box.

7. If you were not at the correct contact record when you accessed the Dialer feature, click **Contact** to access the Contact Manager and navigate to the desired record.

The Call Notes dialog box will be placed in the background and you will be able to move through the Contact Manager in the usual fashion to locate the correct record.

8. When you want to return to the Call Notes dialog box, press ALT+D or select **Call Notes** from the **Office** menu. (**Call Notes** replaces **Dial** in the Office menu when a call is in progress.)

9. Keep notes of your conversation for future reference in the `Comments` field. These will be recorded in the `Comments` box of the scheduled activity in the Activity Manager and in the contact's notepad in the Contact Manager (based on your preference settings). Select the **Stamp** button to place the standard notepad stamp into the `Comments` field (date, time, and User ID). Select the **Paste Contact Info.** button to place key field information from the associated contact into the Comments field. (The contact information will be from the contact record that was open when the Call Notes dialog box was first accessed.)

   If you are using the `Create Activity` feature to create an activity based on your call, the call status will appear in the `Call Result (Status)` field in the new activity.

10. If necessary, edit the call status in the `Call Result (Status)` field or press F2 for a list box.

11. If you are not recording call notes, click **Terminate**. Your modem will disconnect from the call.

**or** If you are recording call notes, you have three options when completing the call:

- **Terminate** will stop the call duration timer. A duration field will appear in the right-hand corner displaying the length of the call. You will remain at the Call Notes dialog box where you can make any additional notes. (When you are ready to exit, click **Save** or **Set Recall**. Alternatively, you can click **Cancel** to exit without saving the call.)
- **Save** will stop the call duration timer, save the call, and exit the Call Notes dialog box.
- **Set Recall** will terminate and save the call and open a Set Recall dialog box. See Scheduling a Recall for instructions on scheduling a recall.

If you have a Last Call field, TeleMagic will update it with the call date and time.

If you have an on-screen notepad and have `Insert Notes into Notepad` selected in Dialer preferences, TeleMagic will update it with the date and time of call, your user ID, whether the call was incoming or outgoing, the duration of the call, the call status, call description, and your call notes.

If you have `Create Activity` selected in Dialer preferences, TeleMagic will also add a scheduled activity to your calendar, with the call date, time, description, duration, and status entered into the appropriate fields, and call notes entered into the `Comments` box. In addition, if you have a `Contact History` field, TeleMagic will update it to show the call.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialing_Outgoing_Calls)<<1} Dialing Outgoing Calls

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# To Place a Series of Calls Using Zoom Dial

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

If you make a series of outgoing phone calls on a regular basis, the Zoom Dial feature will help you save time and increase your productivity. Using Zoom Dial, you can automatically scroll through the database, calling all contacts in the current filter in index order.

## To Set Up and Use Zoom Dial:

1. On the **Options** menu, select **Preferences**.

   The Preferences screen will open.

2. Click the **Dialer** tab.

   The Dialer preferences screen will open.

3. Mark `Zoom Dial` (if it not already marked).

4. Click **OK**.

5. Open the database containing the contacts you would like to call and set the appropriate filter and index (if necessary).

6. Click the phone icon next to the contact's phone field that you would like to dial. (This will allow you to dial the desired number directly, bypassing the Dialer selection box. The number contained in this phone field will be dialed for each contact.)

**or** Click **Dial**.

The Dialer selection box will appear showing the available phone numbers for the current contact.

7. Highlight the appropriate phone number and choose **Dial**.

**or** Select **Manual Dial**. (See Making Calls Using the Manual Dial Feature for help with using Manual Dial.)

8. Refer to the instructions under Dialing Outgoing Calls to complete the call.

- When you complete the call, TeleMagic will automatically move you to the next record and bring up the Dialer selection box for that record. (If you initiated Zoom Dial from a phone icon, the number in that phone field will be dialed for the next contact.)

- Once Zoom Dial has been turned on, the process will continue and allow you to work your way through the current filter. To stop the Zoom Dial process, simply close the Dialer selection box or click **Cancel** at the Call Notes dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Placing_Calls_from_the_Pending_Activity_List)<<1}
Placing Calls from the Pending Activity List

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Placing Calls from the Pending Activity List

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

You are able to access a list of your pending activities directly from the Contact Manager. This allows you to use this list to check your upcoming activities without going through the process of opening the Activity Manager. This is especially useful for anyone who periodically makes a series of calls based on existing activities.

## To Place a Call from the Pending Activity List:

1. From the toolbar, select the Pending Activity tool.

**or** Click the Goto button ( ● ) on the Contact Manager Toolbar, then click the **Pending Activities** button.

The Pending Activity List will open.

2. Highlight the activity on which you would like to call.

If the activity is linked to a contact record, that contact's three phone number key fields will appear at the top of this dialog box. The field prompt will be listed, followed by a phone icon and the number.


3. Select the phone number you would like to dial and click the phone icon.

**or** On the keyboard, press the number preceding the phone number's prompt.

The call will be dialed and the Call Notes dialog will appear.

4. Complete the call following the instructions under Dialing Outgoing Calls.

When you complete the call, you will be returned to the Pending Activity List dialog box. (If you selected to go to the linked contact, you will be returned to that record instead of the Pending Activity List.)

5. Select the next activity on the list and repeat steps 2 through 4.

**or** Click **Close** to exit the Pending Activity List.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Scheduling_Activities_Phone_Calls_Appointments_and_Meetings)<<1} Scheduling Activities (Phone Calls, Appointments, and Meetings)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_To_Place_a_Series_of_Calls_Using_Zoom_Dial)<<1} To Place a Series of Calls Using Zoom Dial

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Dialer_Troubleshooting)<<1} Dialer Troubleshooting

# Scheduling a Recall

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

After completing a call, you will be given the opportunity of setting a recall.

## To Schedule a Recall:

1. After completing a call started with the Dialer, click **Set Recall** at the bottom of the Call Notes dialog box.

   The Set Activity (Recall) dialog box will open.

   The `Description:` field will default to `Call to` and the contact associated with the just completed call (based on your key fields).

2. Edit the activity `Description:` as necessary.

   The activity duration will default to your Activity preference setting for `Default activity duration`.

3. Edit the activity `Duration:` as necessary.

   The `Type` field will default to `Call`. You are not limited to Call type activities. If you need to schedule a different type of activity as a result of your phone conversation, you may do so.

4. Edit the activity `Type:` as necessary or press F2 for a list box of activity types.

5. Select an activity `Priority:` if desired.

6. If you want the item to appear as a To-Do, mark the `To-Do` check box. (The `Call back` section will dim if this is a To-Do.)

7. If this is an activity (rather than a To-Do), type, or use the Date and Time Picker icons to choose a `Call back on` date and a `Call back at` time.

- **or** Select the `Call back in` radio button to specify how far in the future you want to set the activity. Type (or use the spinner arrows to select) a number in the `in` text box and choose the appropriate time block from the drop-down list. (For example, Call back in 3 weeks.)

8. If you want to set an alarm for this recall, click the `Alarm` check box, and type an advance warning time in the `Lead Time:` field (or use the spinner arrows to select a time).

9. If you want to assign the recall to another user, choose a user from the `To:` drop-down list. Only users who have granted you scheduling rights will appear on the list.

10. Use the `Comments` field to enter any activity or To-Do comments. Use the **Stamp** button to precede your comment with a time, date, and user ID stamp. Use the **Paste Contact Info** button to paste the information from the linked contact record into the `Comments` field (based on your Contact Key Fields).
11. If you would like to verify your availability (or the availability of the user to whom you have assigned this activity) for the scheduled time, click **Availability**.

    The Availability dialog box will open.
12. Enter the range of dates on which the activity can be scheduled in the `Start Date:` and `End Date:` fields.
13. Enter the time range during which the activity can be scheduled in the `Start Time:` and `End Time:` fields.

    The `Activity Duration` field will show the duration set in step 3. When the search is performed, TeleMagic will use this duration to determine how large a time block needs to be free in order to accommodate the activity.
14. If you would like to change the activity duration, enter a new duration in the `Activity Duration` field, or use spinner arrows to select the duration. Be aware that if you change the search duration, the duration of the recall will also be changed.

    The `Number of Slots:` field is used to limit how many available time slots during the specified date and time are displayed.
15. Enter a number from 1 to 40 in the `Number of Slots:` field.
16. Click **Search**.

    The search will commence. (Depending on your search criteria, this may take a few seconds to a few minutes.) The window will show the times that the activity can be scheduled without conflicting with another item.
17. Highlight the time slot you would like to use.
18. Click **OK** to schedule the activity at that time.

    You will be returned to the Set Activity (Recall) dialog box.
19. When satisfied with your selections, choose **OK**.

    The activity will be added to your schedule (or the schedule of the user to whom it was assigned) at the selected time. If you have a `Next Call:` field, TeleMagic will update it with the recall date and time.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(tm.hlpï¿½CONTACT4_Handling_Activities_in_the_Contact_Manager)<<1}
Handling Activities in the Contact Manager
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

# Dialer Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Dialerï¿½ ï¿½ ï¿½ )<<1}

*Tone dialing does not work:* There is an easy way to tell if you cannot use touch-tone dialing. If you set up for tone dialing, and you hear your modem dial but the dial tone does not disappear, your phone either is set up incorrectly or will only perform pulse dialing.

*If your modem will not dial at all:* This is probably not a TeleMagic problem, but rather a problem with your modem's setup. Review the documentation that came with the modem and your Windows manual, especially the section on communications. If you have a Windows communications program, try it out first. If you cannot get the modem to work properly under any Windows program, it needs to be set up correctly for Windows use.

*If you dial the phone, but no Call Notes dialog box appears.* The Call Notes dialog box is used to generate information concerning the call, such as the duration of the call and any comments, which can be placed into an activity and in the contact's notepad. If you do not have `Create Activity` and/or `Insert Notes into Notepad` in Dialer preferences set on you will not see a Call Notes dialog box.

*If your modem dials, connects and communicates properly under another program, but still does not work with* TeleMagic*:* The problem is likely in the setup for the modem or dialer in TeleMagic. Read the Setup topics carefully for suggestions on settings. (See Dialer Preferences for help.)

*The Dialer selection box appears but you cannot dial out*. Try clicking **Initialize Modem** on the Dialer selection box. This will tell TeleMagic to send the initialization string to the modem. While the initialization string is automatically sent to the modem whenever the modem is sent a phone number to dial, this process may have been interrupted due to problems with the phone line or other temporary disruptions.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

## Note for Step 10

The `Use Dialer Prefix` and `Use Dialer Suffix` settings do not specifically apply to the North American Numbering Plan. They have been included to allow you the flexibility to create exceptions to your Preference settings if the need should arise.

## Note for Step 2

It is possible to enter letters in a phone field. The Dialer will automatically convert upper case letters to their numeric equivalents when the number is dialed. Lower case letters will be ignored.

## Note for Step 2

TeleMagic will display all phone numbers listed on any page of the *current level*. For example, in the Documentation database, if you display Blair Corey's contact record, TeleMagic lists any phone number on the Contact Data, Contact History, or Contact Profile pages. Phone numbers on pages of the Level 1 (Company Data) view are not listed.

## Note for Step 4

There is a Dialer preference that controls whether or not the Call Notes dialog box opens immediately after a call is dialed. If this preference is not selected, select **Call Notes** from the **Office** menu when you are ready to access the Call Notes dialog box.

## Note for Step 4

If the **Dial** selection in the **Office** menu changes to **Terminate** and the Call Notes dialog box does not appear, your Dialer setup is not configured to record call notes. If you want to have your call notes recorded in TeleMagic, you must have either `Insert Notes into Notepad` or `Create Activity` in Dialer preferences selected. If you are not recording call notes, skip to step 13.

## Note for Step 4

If you change the defaults for the `Call Result (Status)`, `Complete Activity`, and `Type` fields, your changes will be used the next time you access this dialog box with your User ID.

## Note for Step 8

If you have not edited the `Call Result (Status)` field, it will change from `Completed` to `Pending` when the `Complete Activity` check box is unmarked.

## Note for Step 9

If you have accessed the Call Notes dialog box from a Call type activity, any comments associated with the activity will be pasted in the `Comments` field of the Call Notes dialog box by default.

## Note for Step 11

If you have made any changes to the contact record, they will be saved when you press ALT+D or select **Call Notes**. If you do not want to save the changes, click the Cancel button on the Contact Manager Toolbar before returning to the Call Notes dialog box.

## Note for Step 13

There is a Dialer preference for `Prompt for setting recall` that is available when you are not recording call notes. If this is marked, you will be asked if you would like to set a recall. If you click **Yes**, the Set Recall dialog box will open. See Scheduling a Recall for instructions on scheduling a recall.

## Note for Step 13

If you have dialed from the Contact Manager, and you are no longer at the same record in the Contact Manager that was open when you accessed the Dialer feature, you will be asked whether you want to return to that contact's record when you save the call. If you choose **Yes**, the call will be associated with the contact record that was open when you first accessed the Dialer feature. If you choose **No**, the call will be associated with the currently open contact record. If you have dialed from the Activity Manager, you will be asked if you want to associate the call with the activity from which you dialed. If you choose **Yes**, the activity will be updated. If you choose **No**, a new activity will be created without affecting the existing activity.

## Note for Step 13

When you save call notes, you may see a prompt similar to this:
"Add call information to the call you had scheduled at 9:00 a.m. today?" This appears only if you are using the `Create Activity` feature and have scheduled a call for this contact sometime today and have placed a call without using that scheduled call. Select **Yes** to complete the existing activity. Select **No** to schedule a new completed activity without affecting the existing pending activity.

## Note for Step 13

Even if you have accessed the Dialer from an activity in the Activity Manager, the activity will only be updated with the call results if you have `Create Activity` selected.

## Note for Step 2

There is a Dialer preference that controls whether or not the Call Notes dialog box opens immediately after a call is answered. If this preference is not selected, select **Call Notes** from the **Office** menu when you are ready to access the Call Notes dialog box.

## Note for Step 2

If the **Dial** selection in the **Office** menu changes to **Terminate** and the Call Notes dialog box does not appear, you do not have any preference settings selected which will save your call notes. If you want to have your call notes recorded in TeleMagic, select `Create Activity` and/or `Insert Notes into Notepad` in Dialer preferences. If you are not recording call notes, skip to step 11.

## Note for Step 2

If you change the defaults for the `Call Result (Status)`, `Complete Activity`, and `Type` fields, your changes will be used the next time you access this dialog box with your User ID.

## Hint for Step 3

Just the contact name will be highlighted in the `Description` field. If you want to leave the description as `Call from` and only change the contact name, simply start typing. If you want to change the entire field, use your mouse to highlight the whole entry.

## Note for Step 6

If you have not edited the `Call Result (Status)` field, it will change from `Completed` to `Pending` when the `Complete Activity?` check box is unmarked.

## Note for Step 8

If you have made any changes to the contact record, they will be saved when you press ALT+D or select **Call Notes** from the **Office** menu. If you do not want to save the changes, click the Cancel button on the Contact Manager Toolbar before returning to the Call Notes dialog box.

## Note for Step 11

There is a Dialer preference for `Prompt for setting recall` that is available when you are not recording call note. If this is marked, you will be asked if you would like to set a recall. If you click **Yes**, the Set Recall dialog box will open. See Scheduling a Recall for instructions on scheduling a recall.

## Note for Step 11

When you save the call, if you are no longer at the same record in the Contact Manager that was open when you accessed the Dialer feature, you will be asked whether you want to return to that contact's record. If you choose **Yes**, the call will be associated with the contact record that was open when you first accessed the dialer feature. If you choose **No**, the call will be associated with the currently open contact record.

## Note for Step 11

When you save call notes, you may see a prompt similar to this:
“Add call information to the call you had scheduled at 9:00 a.m. today?” This appears only if are using the `Create Activity` feature and you have scheduled a call to this contact for sometime today and have placed a call without using that scheduled recall. Select **Yes** to complete the existing activity. Select **No** to schedule a new completed activity without affecting the existing pending activity.

## Note for Step 8

If you dialed from a phone icon, and you left the Call Notes dialog box when the call was in progress, the Dialer selection box may open rather than automatically dialing the number in the phone field.

## Note for Step 8

If you are not using the Call Notes dialog box, click ESC to stop the Zoom Dial process.

## Note for Step 2

You will be notified if the activity is not linked, or is linked to a contact in another database.

## Hint for Step 4

Click the **Contact** button on the Call Notes dialog box to go to the contact to which the activity is linked.

## Note for Step 7

If you set a day specific `Call back in` time period (as opposed to time specific, i.e., minutes or hours), the activity will be scheduled at the time displayed in the dimmed `at` field.

## Note for Step 10

The activity will be linked to the contact associated with the recent call.

## Note for Step 14

Smaller durations can dramatically increase the time it takes to generate the list of available times. Consider setting a higher duration for the purpose of searching, then set the duration back once the time slot is selected.

## Hint for Step 15

If the activity can be scheduled at any time during your selected time and date range, you can select the first available time slot. In this case set the `Number of Slots:` to 1. If you would like to be able to choose from a selection of available times, set a higher number. Be aware that the more available slots that must be generated, the longer the search will take.

## Note for Dialer Troubleshooting

If you are using a more high tech dialer, such as an INT 14 communications device or a modem pool, it must be accessible through a Windows-compatible COM interface to be used as a dialer for TeleMagic. Please contact the provider of the equipment or your telecommunications representative for more details in these cases.

## Hint for Phone Calls

Even if you are not using a modem to dial the phone from TeleMagic, you can still use the dialer feature to track your calls and call notes.

# Errata

This is a list of corrections to your TeleMagic manuals. All corrections have already been integrated into the appropriate sections of this help file.

System Administrator Guide Errata
Getting Started Errata
Data Synchronization Server Guide Errata

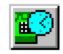
## Getting Started Errata

**Page:**

## Page ii

The telephone number for Administration is incorrect. The correct number is 972-818-3900. This number appears under *For help not found in this manual call TeleMagic:* section, and above the Sage logo near the bottom of the page.

## Page 13

The button for Set Recall is incorrect. The button should be: 

## Page 79

The sentence “You will be able to send Internet mail through MAPI, but not receive.” should be replaced with “ If you do not establish an e-mail account, you will be able to send Internet mail through MAPI, but not receive.”

## Page 92

The following steps should be added to the procedure *To link messages automatically:*

5. Click **Set Search Order**.

   The Select Databases dialog box will open.

6. Mark each database that should be searched.

   The databases will be searched from top to bottom.

7 Change a databases place in the list by highlighting it and clicking **Move Up** or **Move Down**.

8. Click **OK**.

## Page 115

Step 3 should read:

Use the `Add a New` radio buttons to determine whether the new item will be a Document or a Template.

**Page 127**

Disregard this page. Ami Pro is not supported.

**Page 128**

References to WordPro should be Word Pro.

## Page 181

Several controls have been added to the Notebook: Sort Notes by Description, Sort Notes by ID, View Database Notes, View Personal Notes, and a set of VCR buttons. These buttons replace the radio buttons for Use: and Index:, and the browse buttons that were located on the corners of the message area of the Notebook.

# System Administrator Guide Errata

**Page:**

## Page 8

Step 2 under To Install TeleMagic on Windows 98 should read:

> From the **Start** menu on the taskbar, select **Run**. In the Open: field, type D:\UTILS\WIN98\SPEU.EXE (substitute the correct drive letter for your CD ROM if different from D) and click **OK**.

Step 2 under To Install TeleMagic on Windows 95 should read:

> From the **Start** menu on the taskbar, select **Run**. In the Open: field, type D:\UTILS\WIN95\DCOM95.EXE (substitute the correct drive letter for your CD ROM if different from D) and click **OK**.

## Page 247

Step 4 should include the following note:

**Note**: Do not include spaces between command line parameters for REBUILD.EXE.

## Page 212

In step 1 after the **or**, /PROGRAMS should read \PROGRAMS.

## Page 222, 223

In step 24:

- Following the first bullet point, *User Only* should be in a different font from the rest of the sentence.
- Following the second bullet point, *DSS Only* should be in a different font from the rest of the sentence.
- Following the third bullet point, *Both* should be in a different font from the rest of the sentence.

# Data Synchronization Server Guide Errata

**Page:**

## Page 81

The heading for the last paragraph on the page should be:

**Do Not Transport packets to this site**

## Page 101

The parameter /D=# *of days* has been changed to /NDAYS=# *of days*.
The parameter /ALLRECS is now /NOTRANS.

**Page 102**

The parameter /DETACH is now /REMDETACH.

## Page 174

References to the parameter /ALLRECS in step 4 and in the warning should be /NOTRANS.

## Page 182

Step 3 should read:

To control what information is included in this display, click **Filter**.

## Error Messages

Error 1105: File write Error_1105_File_write_error
Error 1705: File access denied
Multi-user Conflict 6: Too Many Files Open
Multi-user Conflict 15: Not a table / DBF
Multi-user Conflict 26: Table is not ordered
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Out of Memory Messages from Windows
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Out of Memory Errors or General Protection Faults when Running Automation Server

## Out of Memory Messages from Windows

"Out of Memory" messages are usually caused by one of two things. Either there is insufficient RAM installed, or Windows is extremely low on resources. Other problems such as General Protection Fault and Page Fault errors may also occur on a computer which is low on resources.

**Insufficient Memory**

If you have less than 32MB of RAM installed, you will want to install additional RAM to a minimum of 32MB, preferably 64MB.

**Insufficient Resources**

If you are running other programs while running TeleMagic, you may be running low on System Resources. To check available resources in Windows 95 or 98, go to the Start menu, select Settings and then Control Panel. Double-click the System icon, then click the Performance tab.

The closer System Resources are to 100%, the better off you are. If you are below about 35% then you are getting too low for safe operation. First try closing some applications. If that doesn't resolve the errors, exit all applications and restart Windows. The reason for this is that over time, as you switch between programs and applications are opened and closed, Windows gradually runs out of resources. The only way to get these resources back is to restart Windows. Depending on how you use your computer, you may need to do this a few times a day.

There are some programs which can actually cause a serious drain on resources. This is known to happen with some drivers added to the Windows SYSTEM.INI file. If the Out of Memory errors just started happening, find out if anything was installed on the computer recently. If this is the case, uninstall or otherwise disable the new software, at least temporarily, and see if the memory problems persist.

## Multi-user Conflict 15: Not a table / DBF

## Multi-user Conflict 41: MEMO file is missing / invalid

These are both errors that occur most commonly due to losing power, turning the computer off or rebooting the computer while TeleMagic is running. If you are running TeleMagic on a network, the problem could be due to the server losing power or crashing. Usually the error indicates that damage has occurred to one of the TeleMagic files.

If you receive this error, TeleMagic will usually exit. Before you click anything, make a note of one item. The very first line just inside of the large box that shows up immediately below the error message will say that a table could not be opened. An example would be:

**Sorry, the Activity table could not be opened. One of the following could...**

In this example, the Activity table is the problem. This will be *critical* information later on, so make a note of it. The next step taken depends on whether you are running a single user version or a network version:

**Single User / Windows 95 / Windows 98**
Close any applications currently running and restart Windows. From the Start menu, select Programs, Accessories, System Tools, then **ScanDisk**. Click the Start button to begin checking the hard drive.

If the hard drive check reports any errors, you may have lost data from one or more files, and some of those are likely to be TeleMagic files. Have ScanDisk fix any problems it encounters.

**Network**
If you have TeleMagic installed on a network drive, how you proceed depends on the type of network software installed. If it is a Windows 95 or 98 network, run the ScanDisk program as indicated in the Windows 95/98 section. Novell Netware has built in utilities used for correcting file system errors on the server. Contact your system administrator for more information on this.

It is usually in your best interest to restore a backup of TeleMagic after repairing any damage to the file system on the hard drive. Depending on which file is damaged, you may also be able to restore only select files from the backup. If there is no backup available, you can either use the Database Repair utility described below, or replace the affected files by copying them from the CD. To determine which files need to be restored or replaced, take a look at the table name you made a note of earlier (from the error message, the table that could not be opened). Below you will find a list of tables in bold print, and under each are the files that are associated with that table. If the table name matches the one in the error message, the files listed below it are the ones you will need to restore from backup or copy from the CD:

**Activity, Activity Comments, Extended Activities**
ACTIVITY.DBF, ACTIVITY.CDX, ACTCAMP.DBF, ACTCAMP.CDX, ACTCMTS.DBF, ACTCMTS.FPT, ACTCMTS.CDX, ACTEXTDF.DBF, ACTEXTDF.FPT, ACTEXTDF.CDX, ACTEXTDG.DBF, ACTEXTDG.FPT, ACTEXTDG.CDX

**User, User-DB Preferences**
USERS.DBF, USERS.FPT, USERS.CDX, USERDB.DBF, USERDB.FPT, USERDB.CDX

**Security Group, Security Expression, Field-level Security**
GROUPS.DBF, GROUPS.CDX, SECEXPR.DBF, SECEXPR.FPT, SECEXPR.CDX, FIELDSEC.DBF, FIELDSEC.CDX

**E-Mail**
MAIL.DBF, MAIL.FPT, MAIL.CDX

**Contact Level 1, Contact Level 2, Contact Level 3**
ALL FILES IN THAT SPECIFIC DATABASE DIRECTORY

**Unique Numbers**
ALL FILES IN ENTIRE TELEMAGIC INSTALLATION

The files mentioned by name in the first three groups will all be found in the TeleMagic common directory, usually \TM4\COMMON. All files listed under any one group must be restored from the backup. DO NOT RESTORE ONLY PART OF THE APPROPRIATE GROUP OF FILES!

If you will be replacing files rather than restoring from a backup, keep in mind that any information kept in the files you are replacing will be LOST. For example, if you are replacing the group of Activity files, then all activities for the entire TeleMagic installation will be lost; if you are replacing the group of User files, then you will need to recreate all of your User IDs and recreate the preferences for those users; if you are replacing the group of Security files, then all security groups will need to be recreated.

If ScanDisk did not indicate any problems, then the Database Repair program in Database Utilities may be able to repair the problem file.

> **Note:** The Database Repair program will check to be sure that the record count in the header of a database file matches the number of records that can be read in the file. If there is a difference in the numbers, Database Repair will change the number in the header of the database file to match that which can be read in the file. This can result in a loss of records, which is why we recommend restoring from a backup if you receive a “multi-user conflict 15” error rather than using this program. However, in the case of a “multi-user conflict 41” error, usually this utility works well. The error message indicates that a pointer between the database (DBF) file and the memo (FPT) file is out of alignment. Database Repair can fix the pointer, allowing the database to be used again with little or no data loss.

**Prevention and Preparation**
There are several ways you can prevent damage to your files, or at least be better prepared in case it does happen:

**/X Command Line Parameter**
On a single user installation of TeleMagic, include a space and then a /X at the end of the command line used to start TeleMagic. This opens the TeleMagic files in “Exclusive Mode”, preventing any other users from accessing TeleMagic (for this reason it is not usually practical for network installations), and also causing the program to perform an immediate write to disk whenever a change is made to a file. This will help prevent damage to TeleMagic files from an accidental reboot or power failure, except in the unlikely event of a power failure at the exact instant that you are saving a record. The single user version of TeleMagic now starts in exclusive mode automatically.

**Uninterruptable Power Supply**
An uninterruptable power supply (or UPS) is used on the server as a backup power supply. This ensures a steady flow of electricity to the server even if there is a power failure.

**Backup Frequently**
Use a reliable backup system. Rotate your backups using different tapes or disks, so that there are always several copies. Keep at least one copy off site.

**Use a Dedicated Server**
One of the most common causes of damage to TeleMagic files is the use of a non-dedicated server. A non-dedicated server simply means that the machine being used as the file server is also used as a

workstation. If that machine crashes (and it will, because of the unusually high demand placed on it), you may end up with damage to TeleMagic files.

## Multi-user Conflict 26: Table is not ordered

This error may also show up as “Error 26: Table is not ordered”, and is usually the result of a rebuild being interrupted. The rebuild may have been interrupted by something external to TeleMagic, or by a problem in another TeleMagic file. If you encounter this error, first try running an external rebuild using the TeleMagic Rebuild icon in the TeleMagic program group. Select the **Run Rebuild Report** option in the rebuild screen, and be sure that the machine used to run the rebuild has access to a printer.

Watch the rebuild closely, and make a note of any other errors that occur. If the rebuild does return another error, make detailed notes of the error number and message, and what files were being rebuilt at the time of the error. Contact TeleMagic Technical Support with these details, or check the Answer Disk or the TeleMagic web site (www.telemagic.com) for the solution.

If the rebuild completes normally, double-check the printed rebuild report and verify that all files were successfully rebuilt. If this is the case then you have already resolved the error.

## Error 1105: File write error

This error may occur when starting TeleMagic, trying to save a record, or when running a rebuild. It indicates that TeleMagic was not able to write to the specified device. In a network installation, this usually means that the user does not have full network rights to the directories used by TeleMagic. Users must have sufficient rights to be able to read, write, and delete files in the global TeleMagic directory, as well as their user directory and any database directories they will need to access. Contact your network administrator for more information on network rights. The error could also indicate that the workstation or server is out of hard drive space, or that there are insufficient file handles. See help file #WIN028 for more information on file handles.

There is also a possibility that a problem with the hard drive itself is causing the error. An example of this would be a "bad sector", where a small portion of the hard drive surface is damaged and can no longer store data. To remedy this, run the DOS or Windows 95 SCANDISK program, with the "Surface Scan" or "Thorough" option enabled. This will find and mark bad sectors on the drive, so that that portion of the drive is not used again.

## Multi-user Conflict 6: Too Many Files Open

This error is generated when your system is not set up to provide sufficient file handles. File handles are simply the maximum number of files your computer or network can have open at the same time. TeleMagic will open up to 100 files. Since the default number of file handles in Windows 95 and Windows 98 does not account for a number of this size, you will need to modify a file on each computer that runs TeleMagic.

**Windows 95/98**

By default, Windows removes the FILES= line from the CONFIG.SYS on upgraded machines. With both upgraded and new installations, Windows has an internal setting for file handles which defaults to 60. You can override this simply by setting the FILES= statement in the CONFIG.SYS to 150.

Use a text editor such as DOS Edit, Notepad, or Sysedit to open the CONFIG.SYS file. This file will usually be found at the root of the boot drive, which will normally be C:. In this file there should be a statement that reads FILES= followed by a number. If the number is less than 150, change it to read FILES=150. If you are running other applications that require additional file handles, you will need to increase the number to accommodate both TeleMagic and the additional applications. FILES=150 is usually sufficient, but you can set it as high as 255. Save the CONFIG.SYS file, close any running applications and restart the computer.

> **Note:** You may need to create the CONFIG.SYS file if it doesn't already exist.

**Windows NT**

In Windows NT, file handles may be changed by editing the CONFIG.NT file in the \SYSTEM32 directory, but this should not be necessary to run TeleMagic.

## Multi-user Conflict 114: Index does not match table. Recreate index

This error is usually caused by an index file that does not match the corresponding DBF file, or by a damaged index file. If you receive this error, TeleMagic will usually close as soon as you click the OK button. Before you click anything, make a note of one item. The very first line just inside of the large box that shows up immediately below the error message will say that some table could not be opened. An example would be:

**Sorry, the Contact level 1 table could not be opened. One of the following could...**

In this example, the CONTACT1 table is the problem. This will be *critical* information later on, so make a note of it. Click the **OK** button to close the error dialog box and TeleMagic.

Using Windows Explorer, locate the \TM4\DATA directory, then locate the database directory under the \TM4\DATA directory. In our example, the problem file is the CONTACT1.CDX. Locate this file, right-click on it and select Rename. Give it the same file name but with a different extension, such as CONTACT1.OLD.

Close Explorer and start the TeleMagic external Rebuild program. Mark the Reindex checkbox rather than Pack and Reindex. Run a rebuild on all the databases, and be sure to print a rebuild report if you have a printer available. Because we renamed the CONTACT1.CDX file, the rebuild program will not be able to find it, and will automatically generate a new one. When the rebuild is finished and the report has printed, check the report to be sure all files were rebuilt.

Start TeleMagic and open your database. If you receive the same error but on a different file, follow the above instructions again. If there is a different error, make note of it and either contact Technical Support or check the TeleMagic help files for the solution.

## Multi-user Conflict 1705: File is in use by another

## Error 1705: File access denied

These errors indicate that a needed file is currently locked or not available to the program. This may be due to a file locking problem between the network and the workstation(s), a network rights issue (the user in question has insufficient rights to the drive or directory), insufficient file handles, or the attributes of a needed file are set to read-only. We will examine each of these situations.

**File Locks**

The first thing to check is if a user has an “exclusive lock” on a file. This can usually be done through your network software, so check the network documentation for more information. One way that a file can be locked open is if someone exits TeleMagic abruptly (such as their machine locks up while TeleMagic is open, and they just shut off their machine and leave for the day). Their machine may be off, but the network software is maintaining their lock on a file. Something similar may happen if the server crashes while TeleMagic is open. The server’s lock on a TeleMagic file may not have been cleared, or the damaged system files from the crash will continue locking the data files incorrectly on restarting the server.

We recommended that the system administrator instruct all users to close all Windows applications and log off the network before turning off the workstation. You may also want to consider purchasing a program that will automatically log users off the network at a specific time (if it is not already provided with your network software). One advantage to an automatic log off program is that your backups and rebuilds are assured of operating properly since there will be no one accessing the files.

**Network Rights**

In order for TeleMagic to operate properly on a network, full rights to the TeleMagic global directory, the user directory, and any database directories the user will need to access is required. For a Novell Netware network, these rights would be Read, Write, Create, Erase, Modify and File Scan. For a Windows NT network, this would be Change (RXWD)(RXWD). Check the documentation for your particular network software for the equivalent to these rights. The error would typically occur if the user does not have Modify rights.

**File Handles**

The 1705 error will rarely occur due to insufficient file handles (normally you would receive a “multi-user conflict 6: too many files open”), but it has happened. See help file #WIN028 for more information on file handles.

**File Attributes**

The error may also occur if a database file is set read-only through the operating system. Make sure all database files (files with an extension of DBF, FPT and CDX) are set read-write.

## Unable to Launch: The specified file was not found

This error occurs when you attempt to launch a mail client, web browser, or other such application by clicking on the icon associated with the Web Address, E-mail Address, FTP Site, or Newsgroup fields. There must be a default application of the type being requested established in Windows to be able to use these icons in this way.

You can establish TeleMagic Internet Mail as your default mail client by marking the Make TeleMagic Internet Mail my default mail client in General Preferences of the Internet Mail program. (From the **Tools** menu of TeleMagic Internet Mail, select **Options**.) See the documentation for your web browser, FTP client, mail client, or equivalent for information on how to make them your default client.

## Error 1958

This error occurs when running under Windows NT with a Generic/Text-Only printer set as default. It will only occur under limited circumstances. To prevent this error, replace or update your printer driver.

## Out of Memory Errors or General Protection Faults when Running Automation Server

When running the Automation Server under Windows 95 or Windows 98 it is possible to generate Out of Memory Errors or General Protection Faults if you are using Word 97 as one of your Word Processors. These conditions result from sending faxes which do not contain merge fields. When trying to fax a document without merge fields, this word processor sends an error which is automatically handled by the Automation Server. However, there is an unrecoverable loss of resources when this is done under Windows 95 or Windows 98. There are 3 ways to avoid this condition:

- Run Automation Server under Windows NT.
- Do not fax documents created with Word 97 unless they contain merge fields. The field can be blank, or can print in white so that it does not appear on the fax.
- When faxing Word 97 documents that do not contain merge fields, select the `Do Not Merge Any` option on the Options page of the Fax dialog box when sending the fax.

The preferred option is to run the Automation Server under Windows NT. The other options should be used only if this is not possible.

## Error 2: File Does Not Exist (...\maillocl.dbf)

This error will occur when attempting to open TeleMagic Internet Mail and one or more supporting files are missing. If the files were accidentally lost or damaged, and there are backups available, restore the backups to the user's directory. (C:\TM4\USERS\??? by default. Replace the ??? with the user's three-character ID.) The files that need to be replaced will be any from the affected user's directory named MAIL*.*.

**Warning!**
Do not copy other user's MAIL*.* files to the affected user's directory.

If backups of the missing files are not available, you must clear mailbox information from the registry on the workstation where the error occurs. To clear the registry of mailbox information:

1. From the Windows Taskbar, click **Start** and select **Run**.

   The Windows Run dialog box will open.

2. Enter the complete path and file name to TMMAIL.EXE followed by a space and /CLEANREG=???, replacing ??? with the user's three-character ID. For example:

   C:\TM4\PROGRAMS\TMMAIL.EXE /CLEANREG=JRC

   This would remove the registry entry for the mailbox of user JRC in an installation using the default directory location.

3. Click **OK**.

   You will receive a message that the mailbox was successfully removed.

Once the mailbox information has been removed from the registry, you will be able to create a new mailbox for the user whose files were lost. New files will be created, all old information will be lost.

# Using the Fax Feature

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

In today's business environment, the ability to communicate instantaneously has become essential. TeleMagic makes such instant communication easier, by making it possible to fax documents created in your word processor, and to include merge fields that pull information from your contact database, without your having to print them first.

TeleMagic provides you with two ways to deal with faxes:

- You can send an immediate fax to an individual contact from within TeleMagic on your local workstation.

- You can send faxes (either for individual contacts or groups of contacts) to a fax queue, where they can be processed (either immediately or later) by an external fax server.

Your system setup and your faxing needs will determine which of these two methods you use. In some cases, you will even be able to switch between the two whenever you like.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½FAX1_Setting_Up_the_Fax_System_for_Local_Faxing)<<1} Setting Up the Fax System for Local Faxing

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Getting_Ready_to_Fax)<<1} Getting Ready To Fax

# Setting Up the Fax System for Local Faxing

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Setting up the Fax System for sending faxes from a server is discussed in the Automation Server Setup topic. (The Automation Server processes faxes, Wireless Messages, and word processing print merge.)

Before you can send faxes locally with TeleMagic, you need to install a class 1 or class 2 faxmodem on your computer. You should then check that the faxmodem initializes correctly, and that it sends faxes successfully. (Do this by installing and testing the software that accompanied your faxmodem.)

Check your Modems Properties (available from the Control Panel) to make sure the settings Windows is using match the settings you have established for the modem. (Pay particular attention to the COM settings Windows has established.) If there are any discrepancies, adjust your Windows settings to match your modem settings.

**Note**

Although TeleMagic provides all the software and drivers necessary for faxmodem initialization and configuration, it is highly recommended that you do not test your new faxmodem for the first time using TeleMagic.

You should also check that Windows recognizes your faxmodem before proceeding.

## To Check That Windows Recognizes Your Faxmodem:

1. From the Taskbar choose **Start**, **Settings, Control Panel**.
2. Double-click the Modems icon.

   The Modems Properties dialog box will open.
3. Click the Diagnostics tab.
4. Select the COM Port on which your faxmodem is installed.
5. Click the More Info… button.

   Windows will attempt to communicate with the selected faxmodem.

   A More Info… dialog box will appear. This indicates that the faxmodem is functioning properly.

   **or** You will receive an error message indicating that there was no response from the faxmodem. If this is the case, you will need to refer to your faxmodem installation instructions to install and configure the faxmodem correctly.

Once you have installed the faxmodem and its accompanying software according to the manufacturer's instructions, and have ascertained that Windows recognizes it and it initializes and faxes without error, you can set up TeleMagic to send faxes.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX1_Before_Setting_Up_Local_Faxing_You_Need_to_Know)<<1} Before Setting Up Local Faxing You Need to Know

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX1_Performing_Local_Fax_Setup)<<1} Performing Local Fax Setup

# Before Setting Up Local Faxing You Need to Know:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Some faxing terminology;

If you do not know what a COM Port is, or what a faxmodem does, we recommend looking at the definitions of these terms which are provided in the glossary. Click the **Glossary** button that appears at the top of every help topic to access the glossary.

Where your faxmodems are installed;

You may only send faxes from a computer that has a faxmodem installed. If your workstation does not have a faxmodem, you may only send faxes to the TeleMagic Automation Server,From there they must be processed by running the server on a workstation that has one or more faxmodems. (If this is the case, refer to the The TeleMagic Automation Server topic.)

If you know that you will always be faxing locally (that is, faxing to individual contacts from a faxmodem attached directly to your workstation, without using a fax queue/server) you should only need to follow the steps in the Setting Up the Fax System for Local Faxing topic.

On the other hand, if you will always be sending faxes to a queue, or if you do not have a locally installed faxmodem, you do not need to perform local faxing setup. You can instead refer to the setup steps outlined in the Automation Server Setup topic.

If you will be using both approaches (for example, sending urgent faxes locally, and queuing faxes sent to all contacts in a filter), you should follow both procedures.

Even if you will not be faxing locally, it is recommended that you refer to the Fax Preferences topic for instructions on establishing your Fax preference settings. Although these settings will not affect the server's settings, many of these options are offered as defaults when you send a fax. While these settings can be entered when you prepare to send a fax, if you will be consistently using the same settings it is a good idea to establish them in Preferences.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX1_Setting_Up_the_Fax_System_for_Local_Faxing)<<1} Setting Up the Fax System for Local Faxing

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX1_Performing_Local_Fax_Setup)<<1} Performing Local Fax Setup

# Performing Local Fax Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Local faxing means creating a single fax and processing it immediately from the computer on which you are working. Local faxing is only available on a workstation which has a locally installed faxmodem that has been configured by TeleMagic. You may not send a fax to a group of contacts (in a filter) in this manner: faxes to all records in a filter must be processed by a server.

## To Set Up the Fax System for Local (Immediate) Faxing:

1. Open TeleMagic on the computer where you have installed and tested a faxmodem.
2. From the **Options** menu, select **Preferences**.
3. Click the **Dialer** tab.

   The Dialer Preferences dialog box will open.
4. Make sure that the fields from `Local Area Code` to `Dialer Suffix` are completed correctly. (Click here for help with your entries in these fields.)
5. Click the **Fax** tab.

   The Fax Preferences page will open.
6. Click **Configuration**.

   The Faxmodem Configuration dialog box will open.
7. If you want to have TeleMagic configure your faxmodem automatically, click **Auto Configure**. There will be a pause (automatic configuration can take up to five minutes to perform) while TeleMagic checks your system for faxmodems. When completed, it will return the names of the modems it found in the window on the left.

**or** If you know the COM Port to which your faxmodem is attached, click **Manually Configure**.

8. Select the COM port to be used for faxing from the drop-down list.
9. Click **Configure**.

   There will be a momentary pause as the new modem is added to the list.
10. Click **Close**.
11. Mark the Use Local `Faxmodem` checkbox.
12. Mark any other preferences from the choices available. See the context sensitive help for more information.
13. Click **Writing**.

The Writing preferences screen will open.

14. Make sure you have a word processor set up for your workstation in the `Word Processors` field. (For information on setting up a word processor, see the Writing Preferences topic.)

15. Click **Key Fields**.

    The Key Fields screen will open, showing the Key Field setup for the currently open database.

16. Select the `Level 1` radio button and click the drop-down list box for the field named `Fax #`.

17. From the list of Level 1 fields, choose the field that contains the main fax number.

    The fax number will be pulled from this field whenever you send a fax from the **Write** menu or using the fax toolbar icon from this level of this database.

18. Repeat steps 16 and 17 for the other levels of the current database, changing levels by clicking the appropriate radio button.

19. When you have set up a fax field for each level of this database, click **OK**.

20. If you will be faxing from more than one database, open each database in turn and set up the Fax Key Field(s).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Getting_Ready_to_Fax)<<1} Getting Ready To Fax

## Dialer Configuration Options Settings

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½ )<<1}

Local Area Code
Dialer Prefix
Prefix for Local Call
Prefix for Long Distance Call
Prefix Override Character
Dialer Suffix

# Getting Ready To Fax

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Before you can send faxes, you need to make sure that your fax system has been set up. If you will be sending faxes locally, make sure you have followed the steps in Setting Up the Fax System for Local Faxing. If you are working on a network with a multi-user version of the program and will be sending faxes to a queue, it is likely that your system administrator has already set up the fax system. If not, you should refer to the Automation Server Setup topic and set up the system yourself.

Once the fax system is set up, you are ready to begin preparing the documents and files to fax.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Selecting_Documents_to_Fax)<<1} Selecting Documents to Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Creating_a_Fax_Cover_Page)<<1} Creating a Fax Cover Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Broadcast_Faxing_vs_Batch_Faxing)<<1} Broadcast Faxing vs. Batch Faxing
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1} Preparing Standard Reports to Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Sending_a_Fax)<<1} Sending a Fax

# Selecting Documents to Fax

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½FAXX_Note_on_Selecting_Documents_to_Fax)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Before sending a fax, you need to create the documents to be faxed. You can fax documents created in any of the following word processors supported by TeleMagic Enterprise with the full power of the TM-Merge:

Ami Pro 3.0 or 3.1

Word for Windows 2.0, 6.0, or 7.0

WordPerfect 6.1 or 7.0

Windows Write and WordPad

Faxing documents from any of these supported word processors will allow you to include merge fields and fax directives in your documents. You will also be able to fax TeleMagic custom and standard reports with information from the Contact Manager, Activity Manger, Sales Forecasting, and other areas of TeleMagic merged into them.

In addition to merge documents and reports, you can fax documents created in external applications. You will be able to fax most documents that you can print.

If you will be faxing locally and want to fax word processing documents with merge fields, make sure that all of the documents to be faxed have been created in the word processor currently set up in Writing preferences (or in Windows Write or WordPad if you do not have a word processor set up). If you will be sending the fax to a queue, you can include documents with merge fields created in different word processors, as long as each word processor has been set up and marked as active in the Automation Server, and as long as the workstation where the server is running has access to the directory where the document is stored. (See Establishing Your Word Processors for more on setting word processor paths for the Automation Server.) If you want to fax a document that was created in a non-supported word processor, you may do so using the external documents feature. (You will not be able to include merge fields in these documents.)

Some word processors use document templates. If the word processor used by the Automation Server is a different installation than was used to create the document, the server may or may not have the template you used. If it does not have the template, it will simply use the settings in the document. If it does have the template, it will use the template as it is defined in that installation. This could create formatting problems if the two templates use different settings (such as fonts, margins, etc.). If the word processor in use by the Automation Server has a document template with the same name as the document template you used to create the document, make sure that the two templates use the same settings.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Creating_a_Fax_Cover_Page)<<1} Creating a Fax Cover Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Broadcast_Faxing_vs_Batch_Faxing)<<1} Broadcast Faxing vs. Batch Faxing

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1} Preparing Standard Reports to Fax

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Sending_a_Fax)<<1} Sending a Fax

# Tips for Faxing Graphics

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Use the following guidelines when faxing graphics in TeleMagic:

- Although you can directly fax black-and-white graphic files with the extensions .PCX, .BMP, .DCX, and .TIF, better results are normally obtained by faxing graphics that have been embedded in a word processing document. You can usually embed a graphic by copying it to the Windows clipboard and pasting it into the document. Many word processors also have the ability to import the graphic directly from a file without using the clipboard. Consult your word processor documentation for more information.

- We recommend using a graphic resolution no greater than 1728 pixels (width) by 1070 pixels (height). If you are having problems faxing a graphic, try decreasing the size. (Many word processors will allow you to size the graphic after it has been embedded in a document. Consult your word processor documentation for more information.)

- Files containing graphics will generally take longer to process than other files. If you will be sending graphics from the Automation Server, you should process using a merge only server.

- You can use the fax printer driver settings to adjust the resolution of graphics that are faxed through TeleMagic. In Windows 95, access Print Manager and right click on the TeleMagic For Windows Fax icon. Select **Properties** from the menu that appears. Select the **Details** tab and click the **Setup** button. Select the **Graphics** tab to access graphic properties. You can use the settings on this window to adjust the dithering , resolution , and intensity .

- If you use the external capture feature to capture a graphic, you can use the FaxMan Viewer to see how the changes you make to these settings will affect your graphics. After you have adjusted the settings, capture a graphic file and preview it to see how your graphics will fax with the new settings. For instructions, see the Faxing External Documents topic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Getting_Ready_to_Fax)<<1} Getting Ready To Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Sending_a_Fax)<<1} Sending a Fax

## Merge Only Server

In the Automation Server, a server that has been set up to only merge faxes. A second server would be used to actually send the faxes. Dividing the tasks of merging and printing the documents and actually sending the documents between different servers can dramatically increase processing speed.

## Creating a Fax Cover Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

The process of creating a fax cover page is the same as the process for creating any document. All sample databases include a FAXCOVER.WRI for Write/WordPad, a FAXCOVER.DOC for Word 6 and greater, and a FAXCOVER.WP for WordPerfect. In addition, the Global directory, where TeleMagic is installed, will have these same files set up without merge fields, but it will point to where the merge fields can be inserted. (See the Word Processing in TeleMagic topic for more information on using TM-Merge.). The only difference between a regular document (with or without merge fields), and a document you will fax, is that you may use special fax directives to add fax-related information and last-minute comments to a document being faxed.

TeleMagic allows you to incorporate fax directives into any of your TM-Merge documents. These directives will merge information from the Send Fax dialog box (the dialog box where you send your faxes). You can create a special fax cover letter which you can use every time you fax, or you can incorporate fax directives into the body of a document to be faxed.

Fax directives are added to a document the same way that other merge fields are added: simply select the appropriate directive from the list of merge fields when you are setting up the document. The fax directives available in TeleMagic are as follows:

| | |
|---|---|
| `Fax Subject:` | If a document contains this directive, it will merge the contents of the `Subject:` field in the Send Fax dialog box. |
| `Fax To:` | This directive is filled in automatically with the information from the `To:` field in the Send Fax dialog box. |
| `Fax From:` | This is the name of the user sending the fax. |
| `Fax Number:` | This is the number to which the fax is being sent. It is pulled from the `Fax #` field in the Send Fax dialog box. |
| `Fax Notes:` | This field will merge any cover comments you create when sending the fax. |

If a fax cover letter also contains database-specific merge fields, it may only be faxed from databases with a compatible structure. Consider creating a cover letter template using the fax directives, then creating separate fax cover letters with merge fields for each database from which you will be faxing.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Selecting_Documents_to_Fax)<<1} Selecting Documents to Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Broadcast_Faxing_vs_Batch_Faxing)<<1} Broadcast Faxing vs. Batch Faxing
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1} Preparing Standard Reports to Fax

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Sending_a_Fax)<<1} Sending a Fax

# Preparing Standard Reports to Fax

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

If you want to fax a standard report, you must first access the report and select the settings you want to use before faxing.

When you fax a document or report, it is first "printed" to the fax printer driver, then output over the modem. This is similar to printing to a printer, except that it is done electronically and not output to paper.

When you print a standard report, you select from a series of options to specify what you want included in the report. Your selections can dramatically change the output of the report. When faxing a standard report, you have to set these options and print the report to the fax printer driver prior to faxing. When you print to the fax printer driver, the report is generated and held ready to be faxed.

## To Prepare a Standard Report to Fax:

1. Access the dialog box for the report you want to fax. (If you are not already familiar with the report, refer to the TeleMagic Reports topic for information on accessing the report you want to fax and completing the settings available to that report.)
2. On the report's dialog box, click **Fax**. (If there is no **Fax** button on the report dialog box, the report is not faxable.)

   The Report Description dialog box will open.
3. Enter a description for the report that will be available for selection when sending the fax.
4. Click **OK**.

   Your default printer will be switched to the TeleMagic Fax Printer driver and the report will be printed to that driver.

   When the fax printer has completed "capturing" the report, your default printer will be reset and you will be returned to the report dialog box.
5. Click **Close** to exit.
6. If you want to fax any additional reports, select the report and repeat steps 1 through 5.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Selecting_Documents_to_Fax)<<1} Selecting Documents to Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Creating_a_Fax_Cover_Page)<<1} Creating a Fax Cover Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Sending_a_Fax)<<1} Sending a Fax

# Broadcast Faxing vs. Batch Faxing

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½FAXX_Hint_for_Broadcast_Faxing_vs._Batch_Faxing)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

The standard way to send a mass fax in TeleMagic is to send a batch fax (a fax that contains documents with merge fields and is sent to a filtered group of contacts). Because there are merge fields in one or more of the documents being faxed, TeleMagic opens a copy of the document(s) for each recipient, replaces merge fields with actual data, sends the fax, closes the document(s), and starts the process again for the next contact in the filter.

However, if you are sending a fax to a group of contacts and you do *not* want to personalize the fax using merge codes, you can send what is called a broadcast fax (one that will not go through the TeleMagic merging process, and will therefore be processed and sent more quickly). A broadcast fax is a fax that is sent to a filtered group of contacts, but not merged with contact data. When the fax is being sent, the user alerts TeleMagic that no merging needs to take place. When the fax is processed, TeleMagic does not open a separate copy of the document(s) for each contact in the filter; it is opened only once and sent to each contact.

Additionally, you have the option of sending a batch fax that only merges data in the cover sheet (see the Creating a Fax Cover Page topic). This is very useful if you are sending out a document that does not require merging, but want to individualize the cover page. When using this option, the cover page is treated like a batch fax, while the subsequent pages are treated like a broadcast fax.

When creating your documents to fax, note whether or not they contain merge fields and if the merge fields are contained in the cover sheet only or in multiple documents.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Selecting_Documents_to_Fax)<<1} Selecting Documents to Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Creating_a_Fax_Cover_Page)<<1} Creating a Fax Cover Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1} Preparing Standard Reports to Fax
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Sending_a_Fax)<<1} Sending a Fax

# Sending a Fax

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Once you have created the documents to be faxed and a fax cover sheet, you are ready to send a fax.

## To Send a Fax:

1. If you will be faxing to an individual contact, go to the record for the contact you want to fax.

2. To send the fax to the number in the Fax Key Field for this database level, from the **Write** menu, select **Send Fax** or click the Fax icon on the toolbar.

**or** To send the fax to the current contact only using any other fax field, click the fax icon next to the field: .

The Fax dialog box will open.

The `From:` field will be filled in automatically with the name of the user currently logged into TeleMagic. The `To:` field will be filled in automatically with information from the contact record, based on your `Contact` Key Field. The `Fax #:` will contain information from the contact record, based on your `Fax #` Key Field if you have accessed the Send Fax dialog box from the toolbar or **Write** menu, or the number contained in the fax field if you have accessed this dialog box from a field's fax icon. (If there is no information in the specified field in the Contact Manager, or if the key field has not been defined, no default will be offered.)

3. Edit the default `From:`, `To:`, and `Fax #:` information, if necessary.

4. If you have included the directive `Subject:` in the document to be faxed, enter a brief explanation of the subject of the fax in the `Subject:` field. (If you are not using the `Subject:` directive, any entry in this field will simply be ignored.)

5. If you are including a separate cover sheet, enter its path and file name in the `Cover` field. If you do not know the path and file name, click **Cover** to locate the file using the Windows Open dialog box. (TeleMagic will remember what document you enter in the `Cover` field and offer it as a default the next time you send a fax.)

6. If you have included the `Fax Notes` directive in the document to be faxed, click **Cover Comm.**.

The Fax Comments/Notes page will open.

7. Enter the text you want merged into the `Fax Notes` directive. This field can hold an unlimited amount of data.

8. When finished, click **Fax**.

   You will return to the Fax page.

   You have the choice of sending faxes from your local workstation (provided it has been set up to do so), or sending them to a queue where they can be processed by a server.

9. If you want the fax to be processed by the server, select the appropriate queue from the Queue: list box.

**or** If you have a faxmodem at your workstation and are not faxing to a filter you can send the fax immediately.

10. Use the check boxes as follows:

    - Select `Create Activity` if you want TeleMagic to create an activity with the type `LetterFax` and the status `Completed` in your Activity Manager. The activity will be linked to the contact being faxed. (If you are sending the fax to a filtered group of records, an activity will be created for each contact in the filter.)
    - Select `Notepad Stamp` if you want a “Sent fax” note stamped in the contact’s Notepad Key Field. (Be aware that if you have a memo field selected as your Fax Stamp Key Field, selecting `Notepad Stamp` will cause the same stamp to be placed in both memo fields. See Using the Fax Stamp for more information on the Fax Stamp Key Field.)
    - Select `Monitor Fax` if you want TeleMagic to display the status of the fax as it is being sent. (`Monitor Fax` is only available if you are faxing locally.)
    - Select `Notification` if you want a pop-up to appear notifying you on completion of the fax. (`Notification` is only available if you are faxing locally.)

11. Click the **Options** tab to open the Fax Options page.

    The Fax Options page allows you to further define specifics concerning this fax:

    - The `Delay Until: Date`: and `Time:` options allow you to instruct TeleMagic to wait until the specified time and date to begin processing faxes that have been sent to the queue. If you delay a fax, it will remain in the queue with the status `Hold` until the specified time. (These options are unavailable when faxing locally. See step 9, above, for more information on selecting to send locally or to the queue.)
    - `Priority:` allows you to adjust the priority of the fax in the queue. The default priority is 2. Priority 1 faxes will be sent to the top of the queue, followed by

priority 2 faxes, then priority 3 faxes. (This option is unavailable when faxing locally.)

- Select `Email Notify On Successful Completion` if you want TeleMagic to send you an E-mail message when the fax is successfully sent.
- Select `Email On Failure` if you want to be notified by E-mail in the event of an unsuccessful fax.
- Select `Stamp Documents` if you want a record of the documents, including the path and file name, and reports sent with the fax. If you have chosen the `Create Activity` option in the main Send Fax dialog box, this information will be stamped in the activity's `Comments` field; if you have chosen the `Notepad Stamp` option in the main Send Fax dialog box, this information will be stamped in the contact's notepad; and if your Fax Stamp key field is a memo field, the information will be stamped in the designated field. (See Using the Fax Stamp for more information on this Key Field.)
- Select `Stamp Comments` if you want to record any cover comments. These comments will be stored in the same manner as the document names described above.
- Select `Use Filter` if you want to fax to multiple contacts. (`Use Filter` is only available if you are posting the fax to the queue. See step 9, for more information on selecting a queue.) If you leave this check box unmarked, a single fax will be sent to the current contact. If you check this box the `Filter:` list box will become active.
- If you have selected `Use Filter`, select the desired filter from the list. The fax will be sent to every contact in that filter.
- Select `Merge All Documents` if you want TeleMagic to search for merge fields in every document being sent and to open every document for each contact in the filter.
- Select `Merge Cover Page Only` if your cover page contains merge fields, but the documents that follow do not. When selected, the cover page will be opened, merge fields will be replaced with contact data, then the cover page will be closed. (If faxing to a filter, this will occur for each contact in the filter.) TeleMagic will not search for merge fields in any documents following the cover page. If you are printing to a filter, they will be opened only once and left open for all records in the filter. (Since TeleMagic does not need to worry about merging data, there is no reason for the document to be opened separately for each contact.) This option can dramatically shorten the time it takes to process faxes, especially those containing graphics.
- Select `Do Not Merge Any` if your document(s) contain no merge fields. With this option

selected, TeleMagic will not search for merge fields in the document(s). In the case of a filtered fax, it will open the word processor on the first fax in the filter to “print” the document, but will not look for merge fields and will not open it on subsequent faxes in the filter. Do not select this option if your documents contain merge fields.

12. When satisfied with your selections, click **Fax** to return to the Fax page.

13. If you want to include any information in the fax in addition to the cover sheet, use the guidelines in the following sections when making your selections:

    If you are faxing the cover sheet plus any additional documents that were created in the word processor you currently have set up in Writing Preferences if faxing locally, or set up for the server if faxing to the queue, see Faxing Documents Created in Supported Word Processors.

    If you are faxing a TeleMagic Custom Report, see Faxing Custom Reports.

    If you are faxing a Standard Report, see Faxing Standard Reports.

    If you are faxing any other external documents, see Faxing External Documents.

**or** If you are only faxing the cover sheet, click **OK** to send the fax.

If you sent the fax to the queue, the fax will be queued.

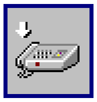
The fax will remain in the queue until you start processing on the server (see The TeleMagic Automation Server for more information) or, if the server is already processing your queue, until the server reaches that part of the queue.

If you have a local faxmodem and chose to send the fax immediately, a processing message will appear:

If you have included any documents from your word processor, the word processor will be launched, the fax will be “printed” to the faxmodem, and the first attempt to send the fax will be made. If you chose to monitor the fax in step 10, a status message box will appear:

Clicking **Abort** at this point will stop the fax in mid-transmission.

If you chose not to monitor faxes in step 10, but want to see the progress of (or abort) the fax, hold down the ALT key and press TAB. Release the ALT+TAB keys when you see this:



The Monitor dialog box will appear.

If you chose to be notified upon completion of the fax in step 10, once the fax has been processed, a message will appear:

Also, depending on your other choices above, an E-mail will be created describing the fax and its progress; an activity will be created and linked to the appropriate contact; the contact's notepad will be stamped, and the `Fax Stamp` field will be stamped. (See the Using the Fax Stamp topic for more information on the `Fax Stamp` feature.) While the notepad is being stamped and/or the activity is being created, you will be notified. If for some reason the notepad could not be stamped or the activity could not be created, you will receive an E-mail explaining what happened.

If you encounter any errors, refer to the Local Fax Troubleshooting topic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Local_Fax_Maintenance)<<1} Local Fax Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Fax_Report)<<1} Fax Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Sending Queued Faxes

# Faxing Documents Created in Supported Word Processors

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

When faxing documents, TeleMagic needs to know where the word processor that is used to open the document is located. When faxing locally, this is accomplished through Writing Preferences. When faxing to the queue, this is accomplished through the word processor setup. (See the Establishing Your Word Processors topic for more information on setting up word processors at the server.)

If you are faxing locally, you can only fax files created in the word processor currently set up in Writing Preferences. If you are using the Automation Server, you can fax documents created in any of the word processors established when setting up the server. Remember, though, that the machine where the server is processing faxes needs to be able to access the documents you want to fax. In a network environment, for example, you should store documents on drives to which the user logged into the workstation running the server has access.

## To Fax Additional Documents:

1. If you have not already done so, follow steps 1 through 12 under To Send a Fax.
2. At the Send Fax dialog box, click the **Docs** tab.

   The Docs page will open.

3. If the document you want to fax was created using TM-Merge (i.e., created from within TeleMagic) in a Word Processor currently set up in Writing preferences, select it from the `Next Document:` list. This list will include any documents which currently appear in the User specific list of documents in your word processor selection box. (If the document you want to use is global or database specific, select the appropriate radio button. See Word Processor Document Selection Box for information on the available document lists.)

   The file name and path to your selection will appear in the first Documents to Fax: field.

4. Click the number button next to the `Documents to Fax:` field if:

   - You are faxing locally and the document you want to fax was created in the word processor currently set up in Writing Preferences, but was not created within TeleMagic (i.e., is not a merge document);
   - You are faxing to the queue and the document you want to fax was created in a word processor that has been set up for use with the server that will be processing the queue. This can include both documents with merge fields and those without merge fields.

   An Open dialog box will appear. The directory will default to your Writing preferences Working Directory selection.

5. Select the document you want faxed and click **Open**. It will appear in the `Documents to Fax:` field.

6. When you have selected all of the documents you want to fax, click **OK** to send the fax.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Custom_Reports)<<1} Faxing Custom Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Standard_Reports)<<1} Faxing Standard Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_External_Documents)<<1} Faxing External Documents

# Faxing Custom Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

You have the option of including with your fax any custom reports that you have designed using the Report Generator.

## To Include Custom Reports in a Fax:

1. If you have not already done so, follow steps 1 through 12 under To Send a Fax.

2. Open the External Docs page and click **Custom Reps**.

   The Select Custom Reports to Fax dialog box will open.

   Any custom reports you have added using the Report Generator will appear on this list.

3. Highlight the report you want to fax in the `Available Reports` list and click **Add**.

   The report will appear in the `Selected Reports` list.

4. Repeat step 3 for each report you want to fax.

**or** If you want to include all of your custom reports, select **Add All**.

   You have the option of having your reports merged using information from the current contact only, or using the filter associated with the report (in the Custom Report dialog box).

5. If you want to merge the reports for the contact being faxed, select the `Current Record Only` radio button. This is useful, for example, if you are faxing an invoice or other report that is specific to an individual contact.

**or** If you want to merge each report using the filter that is associated with it, select the `Reports' Default Filters` radio button. This is useful, for example, if you are faxing a list of phone numbers to a sales representative.

6. When satisfied with your selections, click **OK**.

   You will return to the Send Fax dialog box.

7. Click **Send** to send the fax.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Standard_Reports)<<1} Faxing Standard Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Documents_Created_in_Supported_Word_Proces

sors)<<1} Faxing Documents Created in Supported Word Processors
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_External_Documents)<<1} Faxing External Documents

# Faxing Standard Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

You have the option of faxing any of the reports that have been printed to the fax printer driver. You should already have "captured" the report(s) you want to fax. (See the topic Preparing Standard Reports to Fax for instructions on printing a standard report to the fax printer driver.)

## To Fax Standard Reports

1. If you have not already done so, follow steps 1 through 12 under To Send a Fax.

2. Click on **External Docs**.

   The External Docs page will open.

3. Click **Attach Standard Rpts.**.

   The Select Standard Reports To Fax dialog box will open.

   The `Faxable Reports` list will display any reports that have been printed to the fax printer driver.

4. Highlight each faxable report you want to include in the fax in turn and click **Select**. The reports will move to the `Selected Reports` list.

5. To remove a report from the selected list, highlight it on the `Selected Reports` list and click **Remove**. The report will return to the `Faxable Reports` list.

   When the fax is sent, the reports will be sent in the order in which they appear in the `Selected Reports` list.

5. If you want to change the order in which the reports are sent, click the mover button next to a report name and drag the report into the desired position.

6. If you want to preview any of the selected reports, highlight it on the `Select Reports` list and click **Preview**.

   The Faxman Viewer will open.

   A preview of your report will be displayed in the window.

7. If there are more pages in the report than will display in the window, use the scroll arrows to view the additional pages.

8. If you want to zoom in on any page of the preview, double-click the page.

   The Page View screen will open.

9. Use the scroll bars to view parts of the page that are not

currently visible.

**or** Use the **Image** menu to size the display to fit the window. You have the option to view the page at 100%, 50%, 25%, or to fit the page to the window.

10. If you want to view the next page in the report, select **Image**, **Next Pg**.

**or** If you want to view the previous page in the report, select **Image**, **Previous Page**.

11. When you have finished viewing the page, double click the control box (located on the left of the title bar) or press ESC.

    You will return to the FaxMan Viewer.

12. When you have finished previewing the report, select **Exit** from the **File** menu.

    You will be returned to the Select Standard Reports To Fax dialog box.

13. When you are satisfied with your selections, click **OK**.

    You will return to the Send Fax dialog box.

14. Click **OK** to send the fax.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_To_Maintain_the_List_of_Faxable_Reports)<<1} To Maintain the List of Faxable Reports:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Custom_Reports)<<1} Faxing Custom Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Documents_Created_in_Supported_Word_Processors)<<1} Faxing Documents Created in Supported Word Processors

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_External_Documents)<<1} Faxing External Documents

## To Maintain the List of Faxable Reports:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Write** menu, select **Send Fax** or click the Fax icon on the toolbar.
2. Click on the **External Docs** tab.

   The External Docs page will open.
3. Click **Attach Standard Rpts**.

   The Select Standard Reports to Fax dialog box will open.

   When a standard report is prepared for faxing, the report is generated at that time. If the information on which you are reporting changes, the information contained in the report will be outdated. It is a good idea to remove reports that you no longer need, or that are outdated, from the list of faxable reports.
3. Highlight the report you want to remove from the `Faxable Reports` list and click **Delete**.

   A message will appear informing you that deleting a fax report file is permanent and asking if you want to continue.
4. Click **Yes** to delete the report.

**or** Click **No** to retain the report.

5. When you have deleted all necessary reports, click **OK**.

   You will return to the Send Fax dialog box.
6. If you do not want to send a fax at this time, click **Cancel**. (Clicking **Cancel** will cancel sending a fax; it will not cancel your edits to the list of faxable standard reports.)

**or** If you want to send a fax, refer to the instructions under To Send a Fax.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Preparing_Standard_Reports_to_Fax)<<1} Preparing Standard Reports to Fax

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Standard_Reports)<<1} Faxing Standard Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Custom_Reports)<<1} Faxing Custom Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Documents_Created_in_Supported_Word_Processors)<<1} Faxing Documents Created in Supported Word Processors

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_External_Documents)<<1} Faxing External

Documents

# Faxing External Documents

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

In addition to faxing documents created in word processors supported by TeleMagic, you have the ability of faxing documents external to TeleMagic. Faxable external documents include most documents or files that can be printed. This includes documents created in non-supported word processors, spreadsheets, graphic files, and more.

Normally, when a document is printed, it is printed to a printer driver then output to paper. In order to fax a document, instead of printing to your regular printer driver, you must print the document to TeleMagic's fax printer driver. Once the document has been printed in this manner, it is held ready for you to output it over the modem with your fax.

You must have the TeleMagic Fax printer driver installed to use the external capture feature. This gets installed automatically when you configure your workstation for local faxing. If you have not, select **Preferences** from the **Options** menu. Select **Fax** from the Choose a Topic to Edit list and click the **Configure Faxmodem(s)** button. A message will appear informing you that the TeleMagic Fax printer driver has been added. (If you do not have a modem, exit the Faxmodem Configuration dialog box without performing setup. This will not affect the installation of the printer driver.) When you restart Windows, the printer driver will be available.

## To Fax External Documents:

1. If you have not already done so, follow steps 1 through 12 under To Send a Fax.
2. Click **External Documents**.

   The Fax External Documents page will open.
3. Click **Start Capture**.

   An External Document Description dialog box will open.
4. Enter a description of the document you want to fax in the `Please describe this document:` field. This description will be used to identify the document when you select it for faxing.
5. Click **OK**.

   There may be a brief pause while TeleMagic sets up the fax printer. When it is finished, the External Documents page will indicate that Print Capture is on.
6. Open the file you want to print in its associated application.
7. Print the file in that application. (The file will not be sent to your printer.)
8. If you want multiple documents in this file, repeat steps 6 and 7 for each file you want to fax then return to TeleMagic.

9. At the External Documents dialog box, click **End Capture**.

   The dialog box will indicate that print capture is off. A file will be created containing the external document(s) you have printed.

10. To create another file of external documents, repeat steps 3 through 9.

    By default, any external document files that you have created during this work session will be included with the fax in the order in which you have created them.

11. To preview the documents that will be faxed, remove any files from the list to be faxed, change the order in which they are faxed, or include any previously printed documents, click **Attach Docs**.

    The Select External Documents to Fax dialog box will open.

    The list on the top will include any external document files you have previously created. The list on the bottom includes the files that will be sent with this fax.

12. If you want to include any external document files that were created in a previous work session, highlight the file on the list on the top and click **Add**.

    The file will move to the list on the bottom.

13. If you want to exclude any external document files that are currently selected for faxing, highlight the file on the list on the bottom and click **Remove**.

14. If you want to preview the contents of any selected file, highlight the file on the list on the bottom and click **Preview**.

    The FaxMan Viewer will open displaying the file you have selected.

    A preview of the external document(s) included in the selected file will be displayed in the window.

15. If there are more pages in the file than will display in the window, use the scroll arrows to view the additional pages.

16. If you want to zoom in on any page of the preview, double-click the page.

    The Page View screen will open.

17. Use the scroll bars to view parts of the page that are not currently visible.

**or** Use the **Image** menu to size the display to fit the window. You have the option to view the page at 100%, 50%, 25%, or to fit the page to the window.

18. If you want to view the next page in the file, select **Image**, **Next Pg**.

**or** If you want to view the previous page in the file, select **Image**, **Previous Page**.

19. When you have finished viewing the page, double click the control box (located on the left edge of the title bar) or press ESC.

    You will return to the FaxMan Viewer.

20. When you have finished previewing the file, select **Exit** from the **File** menu.

    You will be returned to the Select External Documents to Fax dialog box.

21. If you want to change the order in which any of the external documents are faxed, click the mover button next to a file description and drag the item into the desired position.

22. When you have selected all of the external document files you want to fax, click **OK**.

23. Click **Send** to send the fax.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_To_Maintain_the_List_of_External_Documents)<<1} To Maintain the List of External Documents:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Documents_Created_in_Supported_Word_Processors)<<1} Faxing Documents Created in Supported Word Processors

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Standard_Reports)<<1} Faxing Standard Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Custom_Reports)<<1} Faxing Custom Reports

# Maintaining the List of External Documents:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

## To Maintain the List of External Documents:

1. Open the Send Fax dialog box (from the **Write** menu, select **Send Fax** or click the Fax icon on the toolbar.

2. Click **External Docs**.

   The External Docs page will open.

3. Click **Attach Docs**.

   The Select External Documents to Fax dialog box will open.

   Once you have faxed an external document you should delete the document file if you will not need to fax it again in the future.

4. Highlight the file you want to delete from the list on the top and click **Delete**.

   A message will appear asking you to confirm your decision to delete the file.

5. Click **Yes** to delete the file.

**or** Click **No** to retain the file.

6. When you have removed any necessary files, click **OK**.

   You will return to the Send Fax dialog box.

7. If you do not want to send a fax at this time, click **Cancel**. (Clicking **Cancel** will cancel sending a fax; it will not cancel your edits to the list of external documents.)

**or** If you want to send a fax, refer to the instructions under To Send a Fax.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_External_Documents)<<1} Faxing External Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Documents_Created_in_Supported_Word_Processors)<<1} Faxing Documents Created in Supported Word Processors

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Standard_Reports)<<1} Faxing Standard Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Faxing_Custom_Reports)<<1} Faxing Custom Reports

# Local Fax Troubleshooting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

As a general rule, most faxmodem problems will be ironed out in advance if you test the faxmodem with its own software before trying to run it with TeleMagic.

*If your first fax failed with the message "No Dialtone"*, either the phone line to which your faxmodem is connected is not an active line, or the faxmodem is not plugged into the phone line. Check the phone line by attaching a regular phone to it, and listening for a dial tone. If you do not hear one, use a different phone jack.

**WARNING!**
Make sure that the phone line you are using is an analog line. If the phone runs through a PBX, it is more than likely a digital phone line and could damage your modem.

*If a fax will not send*, and the program gives no indication that there is anything wrong, check your Dialer preferences options. Make sure that the `Dialer Prefix` setting is correct.

TeleMagic uses Windows to access COM Ports: it does not access them directly. As a result there are some general Windows-related setup problems that you may experience when setting up your server. Try the tips below if you are experiencing non-TeleMagic related problems.

*If you are experiencing delays of several minutes* while TeleMagic searches for faxmodems on your system, make sure that your COM Port does not have IRQ or memory address conflicts with other devices on the system. Also, check that your COM Port is identified correctly within Windows. The Control Panel's Port settings must match the hardware setup.

By default, COM 1 and COM 3 share the same IRQ (interrupt) and COM 2 and COM 4 share the same IRQ. Unless your modem supports an IRQ other than the default (IRQ4 for COM 1 and 3, or IRQ 3 for COM 2 and 4), if you have COM 1 and COM 2 already in use on your machine, you will not be able to use the fax feature.

Make sure that the COMM settings for your modem match the COMM settings in Windows 95. To check the COMM settings in Windows 95, select **Modems** from the Control Panel to open the Modems Properties dialog box. Refer to your Windows documentation for information on viewing and adjusting these settings if necessary.

*Some third party Windows COMM drivers may cause problems with* TeleMagic. Try setting the COMM.DRV line in the [system] section of your SYSTEM.INI file to COMM.DRV=COMM.DRV. (Remember to save the older setting in case you need to restore it later. The easiest way to save the older COMM.DRV= line is to place a semicolon (;) directly in front of it, then enter our suggested setting on a separate line. This will effectively disable the old setting until the semicolon and the new line are removed.)

*If you are experiencing COMM port conflicts,* this may be the result of having an active COMM port with nothing actually attached to it. If your COMM settings show the modem set to this port, conflicts will occur. Make sure that your COMM settings reflect the true port to which your modem is attached.

*If you consistently have problems with a particular faxmodem that supports multiple classes,* it is possible that the modem is not fully compatible with a "supported" class. Refer to Fax Preferences:

[Configure Faxmodem(s)] for instructions on selecting which class to use.

*If you encounter errors when performing external document capture,* close TeleMagic, access the Windows Printer folder and delete the TeleMagic Fax driver. Launch TeleMagic. A message will appear informing you that the TeleMagic Fax printer driver has been installed. When you restart Windows, the printer driver will be available.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Fax_Error_Messages)<<1} Fax Error Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Local_Fax_Maintenance)<<1} Local Fax Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

## Fax Error Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

The following is a list of the possible error messages you may encounter for failed faxes and their meanings:

| **Error Message (Fax Result Code)** | **Meaning** |
|---|---|
| Error Dialing | **TeleMagic** encountered a problem dialing the phone. |
| Error Initializing Faxmodem | **TeleMagic** was unable to initialize the faxmodem. Reconfigure the faxmodem in Fax preferences. |
| Fax File Invalid | This may indicate a problem with the Local ID set up in Preferences. Try deleting the Local ID and resending the fax (select **Resend** at the local Fax Maintenance screen). |
| Faxmodem Not Compatible | You must be using a Class 1 or Class 2 faxmodem to send faxes with **TeleMagic**. |
| Incompatible DLL/Server Versions | This will occur if the fax print driver has not been completely updated. Delete the TeleMagic for Windows Fax printer from Windows' Print Manager. The next time you send a fax, TeleMagic will reinstall the print driver. |
| No Dialtone | There is no dial tone on the phone line to which your faxmodem is connected. Test the phone jack using a regular phone and connect the faxmodem to a different jack if necessary. |
| User Cancel | The user aborted the fax. |

The following list of errors are a result of a problem with the receiving fax machine:

| | |
|---|---|
| No Answer | Remote Fax Busy |
| Remote Error (MPS) - Multi-Page Sync error (error between pages) | Remote Error (EOP) - End Of Page not acknowledged |
| Error Setting Local ID | General Modem Error (Unknown) |
| FDCS Not found | No FHNG |

| | |
|---|---|
| Remote Error (Train) - Receiving machine will not reset for new page | Unable To Connect - Problem with phone line, or similar error |
| Command Not Acknowledged | Unknown Error |
| Connect Error | Error Negotiating With Remote |
| Timing Error - Different modem speeds | |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Local_Fax_Troubleshooting)<<1} Local Fax Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½FAX2_Local_Fax_Maintenance)<<1} Local Fax Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

# Local Fax Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Faxingï¿½ ï¿½ ï¿½ )<<1}

Local fax maintenance allows you to deal with faxes that have been sent from your workstation. You have the ability to resend a fax, view details, or delete the fax from the list. You cannot use this procedure to maintain faxes that were sent using the Automation Server.

## To Use Local Fax Maintenance:

1. From the **Options** menu, select **Maintenance**, **Faxes**.

   The Fax Maintenance dialog box will open.

2. Use the following guidelines when maintaining your faxes:

   - If a fax has failed, highlight it and click **Resend**.
   - If you want to see a preview window of the document(s) sent with the fax, click **Show Doc**.
   - Click **Detail** to display a Fax Detail screen with information about your fax.
   - Click **Delete** to remove the highlighted fax from the list.
   - Click **Delete All** to clear the list.

3. Click **Close** to exit the Fax Maintenance screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Local_Fax_Troubleshooting)<<1} Local Fax Troubleshooting
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½FAX2_Fax_Error_Messages)<<1} Fax Error Messages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½TM_Troubleshooting)<<1} Troubleshooting

## Note for Step 2

This dialog box will list any modems which have been configured for use with Windows. Because it is possible to manually add peripherals to your Windows installation using the Control Panel, the modem(s) listed here may or may not actually exist in your system. It is also possible that a modem listed here has been incorrectly configured, and so will not function properly.

## Note for Step 4

Do not change your other Dialer settings (`Tone`, `Pulse`, `Insert Notes into Notepad`, `Zoom Dial`, `COM Port`, `Baud Rate`, or the Advanced settings) to match your faxmodem. These settings are for use with the Dialer feature and have nothing to do with faxing.

## Note for Step 5

This current set of steps only refers to the Fax preferences settings that are essential in the fax setup process. For more information on every preference setting, see the Fax Preferences topic.

## Hint for Step 7

You will probably not need to adjust this setting. This option is provided for troubleshooting in the event that your faxmodem is not completely compatible with a supported class.

## Hint for Step 9

If you are encountering any problems using automatic configuration with your system, try using the manual configuration method instead.

## Note for Step 10

If you select a COM Port which does not have a faxmodem attached, you will receive an `Unable to Add Device` message.

## Note for Step 12

If you check `Use Local Faxmodem`, but have not yet configured your faxmodem, you will receive a pop-up informing you that you must configure your faxmodem to send locally.

## Note for Step 13

If you are not sure about this option, try leaving it blank initially. You can change it later if you have problems sending faxes.

## Note for Step 17

If you do not have a contact database open, `Key Fields` will not appear on the `Choose a Topic to Edit:` list. Additionally, `Key Fields` will not appear on the list if you do not have security access to edit database specific preferences.

## Note for Step 19

Only Phone and Fax type fields will appear on the list of available fields. If there are no fields listed, you do not have any phone or fax fields on Level 1 of the current database.

## Note for Step 21

You also have the option of establishing a fax stamp field from the Key Fields screen. Refer to the Using the Fax Stamp topic for more information.

## Note for Step 4

The report is being printed to the fax printer in preparation for faxing. No actual printout will be made of the report when you use the **Fax** button.

## Note for Step 6

Information for the report is read at the time it is printed to the fax printer. If you will be making any changes to the contact records or activities included in the report, make the changes before you capture the report. It is generally recommended that you capture the report as close to the time you intend to fax it as possible.

## Note for Step 1

If you will be faxing a document that uses merge fields from a lower level than the contact you want to fax (for example, if your contact is on Level 2 and your document is for Level 3), you should go to the appropriate record on the level associated with the document. If you do not, fields will be merged from the first lower level record linked to the record you are faxing.

## Note for Step 2

If you have not established a Fax # Key Field you will receive a pop-up informing you that no key field has been defined. You will still be able to access the Send Fax dialog box, but you will not be offered a default fax number. Similarly, if the contact record from which you access the Send Fax dialog box has no fax number, you will not be offered a default.

## Note for Step 2

If there is a pipe character "|" anywhere in the fax field, you will not be able to fax to this number. (Placing this character in a field allows you to maintain a record of the fax number, while preventing faxes from being inadvertently sent to it. This is particularly useful if you have received a request from a contact that no faxes be sent, especially if this request is for a limited duration, such as while the contact is on vacation.) When TeleMagic finds a pipe character in the field set up as the `Fax #` field in Key fields, you will not be able to access faxing from the menu or the toolbar for that record. When there is a pipe character in any other fax field, you will not be able to click on the field's fax icon. If you are faxing to all contacts in a filter, any fax numbers containing a pipe character will be skipped.

## Hint for Step 2

You may attach a list box to any of the text fields on this screen. For example, attaching a list box to the **Cover** field can be useful if you have a selection of cover letters you use, as it saves you having to enter the path and file name manually. See Adding Data Using List Boxes for more information.

## Note for Step 3

If you are faxing from your local workstation, pay special attention to the contents of the `Fax #:` field, as these are the exact numbers TeleMagic will use to send the fax. Any Dialer preferences you have will be analyzed and accounted for when this dialog box first appears. (For example, if your local area code is 707, and the fax number begins with the area code 707, the 707 will not be included as part of the default fax number in the Send Fax dialog box.) TeleMagic will not reference your Dialer preferences beyond offering the initial default. If you make any changes to the contents of this field, the number will be dialed as it appears. (For example, if you place 707 back in the field it will be dialed, even if it is your local area code.) If you are faxing to the queue, TeleMagic will send the number in the `Fax #` field (as edited) to the server and apply any settings established there. (For example, if you place the area code 707 in the `Fax #` field, the number will be sent to the server as edited. However, if the local area code established at the server is 707, the area code will not be dialed.) It will not reference your local preferences.

## Hint for Step 3

If you will be sending the fax to a queue, but currently have selected to send locally, change to the queue *before* editing the `Fax #` field. When you send locally, TeleMagic reads your Dialer preferences to determine if the number is local or long distance. When you send to the queue, it reads your server's settings. If you are able to send locally, when you open the Send Fax dialog box, the fax number will be based on your Dialer preferences. If you then change to a queue, TeleMagic will go back to the Contact Manager for the actual number so the server's settings can be applied when the fax is sent. When this occurs, any edits you have made to the `Fax #` field will be lost and will have to be re-entered. (See step 9 for more information on changing your queue.)

## Note for Step 5

If you are faxing locally, you must select a cover letter that was created in the word processor currently set up in Writing preferences (or in Write or WordPad if you do not have a word processor set up in Preferences). If you are posting the fax to the queue, make sure the cover letter file (as well as any other document files) is in a location accessible to the workstation where the fax will be processed.

If the document contains merge fields, make sure the merge fields are compatible with current database (i.e., that the fields actually exist in the database).

## Note for Step 7

If you are using a cover letter created in Ami Pro, it will not recognize paragraph markers entered in the comments. It will translate paragraph markers (carriage returns) into spaces, so everything you type will be faxed as one paragraph.

## Note for Step 9

The `Send Immediately (Local)` option will not appear on this list if you do not have a faxmodem at your workstation or did not mark the `Use Local Faxmodem` check box in Fax Preferences.

## Note for Step 10

These check boxes will default to the selections you made in faxing preferences. They can be edited as necessary for individual faxes.

## Note for Step 10

To avoid overloading your Activity Manager, the activity will not appear on you calendar. It will be available from Browse in the Activity Manager and in reporting. It will also appear on any activity lists for the contact, as well as the contact's document history.

## Note for Step 10

If you are faxing locally, and you select Create Activity or Notepad Stamp, you will be briefly interrupted as soon as the fax is sent while TeleMagic creates an activity and stamps the contact's notepad. Faxes sent successfully from the queue will stamp notepads and create activities without causing any interruptions.

## Note for Step 11

The check boxes will default to the selections you made in Fax preferences. They can be edited for individual faxes if necessary.

## Note for Step 11

Only supervisor users will be able to select Priority 1 for their faxes.

## Note for Step 11

When a fax is sent to all contacts in a filter, the fax number will be taken from your Fax Key Field. If you used the icon next to a fax field to access the Send Fax dialog box, you will receive a message informing you that the Key Field will be used instead of the field selected in the Contact Manager.

## Note for Step 11

Depending on the number of TeleMagic users, servers, and queues at your company, there could be a significant delay between the time that you send the fax to the queue and the time a server gets around to processing it. It is only when the fax is actually processed that TeleMagic evaluates the filter. Because of this, when faxing to a filter, you should not change or delete the filter until the fax has been sent. Additionally, be aware that if you make an edit to a record that moves it out of the filter, that contact will not receive the fax.

## Note for Step 11

If you are not creating an activity or stamping the notepad, and if your Fax Stamp Key Field is not a memo field, selecting either Stamp Documents or Stamp Comments will have no effect.

## Note for Step 11

See Broadcast Faxing Versus Batch FaxingFAX2_Broadcast_Faxing_vs_Batch_Faxing for more on the benefits of this option.

## Note for Step 11

If you attempt to fax a document from Word 6.0 which contains a graphic and merge fields, you may experience a memory problem associated with DLL files in this word processor. If you are faxing a document with a graphic from Word for Windows 6.0 to every contact in a filter, make sure this option is selected. Alternatively, if you need to fax a graphic and use merge fields, select Merge Cover Page Only and make sure the graphic is not included on the cover page. (It may be located on any of the following pages.)   If you must include both a graphic and merge fields in a Word for Windows 6.0 document, be aware that there will be a loss of resources when the document is merged for each contact in the filter. See Automation Server TroubleshootingADVANCED_Automation_Server_Troubleshooting for help with using TeleMagic's resource tools at the server to monitor and compensate for this problem.

## Note for Step 12

If you selected a filter, when you return to the Send Fax dialog box, the `To:` field will contain the name of the filter instead of the contact’s name, and all other information will be dimmed.

## Note for Step 3

If the document contains merge fields, make sure the merge fields are compatible with current database (i.e., that the fields actually exist in the database).

## Note for Step 4

If you would like to fax a document that was not created in a supported word processor, see Faxing External Documents.FAX2_Faxing_External_Documents

## Note for Step 4

In addition to text files, you may select black-and-white files with the extensions .PCX, .BMP, .DCX, and .TIF. We recommend using a resolution no greater than 1728 pixels (width) by 1070 pixels (height).

## Hint for Step 5

You can edit your entries in the `Documents to Fax:` fields in the same way you edit any text field. To remove an entry, use the mouse to highlight the entry and press BACKSPACE or DELETE.

## Note for Step 5

If you are faxing to a filter and select this option, each contact in the filter will receive the report with information from his or her own record.

## Note for Step 4

A maximum of 5 standard reports can be included in a single fax. If you select more than 5 standard reports for inclusion in a single fax, only the first 5 will be accepted and you will receive a message advising you to include additional reports in a separate fax.

## Note for Step 4

The contents of these reports was generated at the time the report was sent to the fax printer driver. If the information on which you are reporting has changed since the report was printed to the fax driver, the changed information will not be reflected in the report. Ideally reports should be printed to the fax driver just prior to faxing.

## Note for Step 5

Clicking **Cancel** at this point will only cancel any selections you have made to the `Selected Reports` list when sending a fax. It will not undo the deletion of any reports.

## Note for Step 7

Some external applications do not support printing to the fax driver used by TeleMagic. If the **Print** menu option is dimmed in the application containing the file you would like to fax, you will not be able to use this option. However, many types of files can be embedded into a word processing document. If you are unable to fax the desired document directly, consult the documentation for your word processor to determine if you can include the file in a document created in a word processor supported by TeleMagic. (It may then be selected in the list of `Documents To Fax`.)

## Hint for Step 8

Documents will be faxed in the order in which they are printed. If you need to be able to change the order, end the capture, then perform a separate capture for the next document.

## Note for Step 6

Clicking **Cancel** at this point will only cancel any selections you have made to the list on the bottom. It will not undo the deletion of any files.

## Hint for Step 5

If you want to determine what class of faxmodem you have installed, scroll to the bottom of the More Info… screen. Next to the entry ***AT+FCLASS=?*** will be one or more numbers, separated by commas. (**Example:** 0,1) If 1, 2, or 2.0 are included in the return, you will be able to use the installed faxmodem with TeleMagic.

## Note on Selecting Documents to Fax

In addition to files created in support word processors, you may fax black-and-white files with the extensions .PCX, .BMP, .DCX, and .TIF without using the external documents feature. We recommend using a resolution no greater than 1728 pixels (width) by 1070 pixels (height). For more information on faxing graphics, see the Tips for Faxing Graphics topic.

## Hint for Broadcast Faxing vs. Batch Faxing

Even if you will be sending a fax to an individual contact (not to a filter) it is quicker to send a broadcast fax as TeleMagic does not have to search for merge fields.

Because graphic files usually take longer to print than text files, going through the process of opening a graphic file for every contact in a filter can take a considerable amount of time. If at all possible, send a broadcast fax or only merge the cover page when faxing graphics.

## Note for Step 3

You must first prepare reports for faxing for any to be listed on the Select Standard Reports to Fax dialog box. To prepare a report for faxing, select the report from the list of reports on the Standard Reports submenus and click **Fax.**

## About Screen

Part of the **Help** menu, this screen gives you general information about the version of TeleMagic you are running, and valuable numbers to call for customer and technical support.

## Access

Permission to see, use, or change information, records, or programs. You can control who sees, uses, or changes your records and databases by granting or denying access.

## Active

Describes the icon or window which is currently in use or selected. When a window becomes active, its title bar changes color. When an icon is active, its name becomes highlighted. Only one window or icon can be active at any one time; all others are inactive.

## Active Filter

The filter currently in use. See also: Filter

## Activities

Scheduled items such as calls, meetings, and To-Do’s.

## Activity Archive

To move a group of activities to a file outside of TeleMagic Enterprise, which can then be archived (stored) or deleted.

## Activity Based Recall

An activity with the type “Call” scheduled in the Activity Manager. Activity based recalls are assigned to a specific user and will appear on that user’s calendar. Compare: Contact Based Recall

## Activity Browse

A tabular list of all activities for the current user. Activity Browse is accessed through the Activity Manager **Browse** button.

## Activity Manager

The TeleMagic program which manages your appointments, activities, and things to do.

## Activity Rollover

A feature which allows you to move your incomplete activities forward a specified number of days.

## Activity Reassign

A feature which allows you to assign activities from one user to another.

## Activity Rollup

A list of all activities attached to a particular contact. The Activity Rollup List is accessed from the Contact Manager.

## ACTIVITY.DBF

The file in which activities are stored. In the TeleMagic Enterprise global directory (where all TeleMagic files are located), this file holds the activities which appear in your Activity Manager.

## Actual Memory

The amount of installed RAM. See also: RAM

# Alarm

A TeleMagic feature which allows you to warn yourself of a pending appointment using an on-screen prompt.

## Alias

An alternative name assigned to a table for convenience or consistency.

## Align to Grid

A tool in the Report Generator and Screen Designer which helps you place objects in alignment with one another. Align to Grid allows you to select the objects you want aligned, and position them relative to an invisible grid you define.

## Anti-aliasing

The automatic removal of the jagged appearance produced by diagonal lines, curves, or circles when display resolution is too coarse to hide the stair-stepped appearance. This can be done by using a higher resolution, or by shading or coloring the neighboring pixels to minimize the effect.

## Append

To add to the end of existing text without overwriting.

## Application

A collection of computer programs used for a related set of tasks. TeleMagic is an application; the contact manager is a program within the application.

## Application Icon

Small picture which represents a Windows application, group of applications, document, or embedded object.

## Arrow Keys

Found on the keyboard, these keys are often used in positioning your cursor.

## Assign

In the Activity Manager, to schedule an activity or To-Do for another user. During the import process, designating which TeleMagic data fields will correspond to respective data fields in the source database. See also: Data Field

## Authorized Marketing Partner (AMP)

Your local Reseller: a resource for planning, installation and support of TeleMagic.

## Auto-Dial

Automatically dialing your phone using the Dialer in TeleMagic. See also: Dialer

## AUTOEXEC.BAT

The batch file which is executed when you first turn on or boot the computer.

## Auto-Incrementing Field

A field which contains a unique number, See: Unique Number Field

## Automation Server

The TeleMagic program that is used to process faxes, wireless messages, and word processing documents from a dedicated workstation.

# Auto-Tracking

Throughout TeleMagic, auto-tracking allows you to keep a record of activity related to a contact. For example, you can auto-track print merge, faxing, phone calls, etc. See also: Productivity Tracking

## Background Color

The color of the area behind the active window and anything else currently on screen.

## Backup

The process of copying information on hard disk to floppy disk, tapes, or other types of backup devices. This is a safety feature which ensures against data loss in the event of a system failure. *It is extremely important that you maintain a current backup.*

## Batch Fax

A fax that contains documents with merge fields that is sent to a filtered group of contacts. Batch faxes must always be posted to a queue and processed by a server. Because there are merge fields in one or more of the documents being faxed, TeleMagic Enterprise opens a copy of the document(s) for each recipient, replaces merge fields with actual data, sends the fax, closes the document(s), and starts the process again for the next contact in the filter. Compare to: Broadcast Fax

## Baud Rate

The speed at which your modem can process information. Higher baud rates indicate faster processing time.

## Branch Scripting

A multi-layered pre-written set of statements, answers, questions, or prompts based on the branches of a tree for customer contact by phone. Choose one branch, it will lead to another, etc.

## Bitmap

A pattern of pixels combined to create a picture; for example: the icons in the toolbar.

# Broadcast Fax

A fax that is sent to a filtered group of contacts, but not merged with contact data. When the fax is being sent, the user ensures that no merging takes place by selecting the `Do Not Merge Docs` radio button in the Send Fax dialog box. Because of this, TeleMagic opens only one copy of the document(s), and sends the fax to each contact in the filter without ever closing the document(s). Broadcast faxes must always be posted to a fax queue and processed by a fax server. Broadcast faxing is much faster than Batch Faxing since you are not performing a merge.

## Browse

To look at database in a tabular format based on an index listing.

## Button

An on-screen tool (usually containing a key word or picture) which graphically represents an action. Clicking on a button starts the action associated with that button.

## Byte

A data measurement, representing one character or number.

## Caching

The ability to reserve a certain amount of RAM as a temporary storage place for data that is in use when data is being read from or written to a hard disk.

## Calculated Field

A field which contains the result of a calculation based on other fields or an expression.

## Call Notes

Notes the user enters to record the results of a call made or received using the Dialer feature, which can then be used in various areas of the program.

## Call Tracking

A TeleMagic feature which allows you to create an activity and stamp a contact's notepad with the results of a call. Used to provide a history of communication with the contact and in productivity tracking.

## Cancel

To abort a process without saving any changes made.

## Cascading Menu

A sub-menu, indicated by a small arrow. which opens when an option from another menu is selected. The **Tags** option on the **Current Record** menu opens a cascading menu.

## Case Sensitive

When a program distinguishes between upper and lowercase characters.

## CD-ROM

*Compact Disk - Read Only Memory.* A type of disk that allows you to store large amounts of data on one disk. TeleMagic installs from a CD-ROM.

## Central Database

In database synchronization, this is the main TeleMagic Enterprise database which contains source records. It is the database with which all remote databases communicate.

## Character Field

A data field which contains textual information. Names, addresses, and job titles are stored in Character Fields. Numbers which are not used for math, such as ZIP codes, telephone numbers, product codes, and social security numbers are also stored in character fields. See: Data Field, Logical Field, and Number Field.

## Check Box

A box followed by text used to turn settings on and off. If a checkbox contains an X, the associated setting is turned on. More than one box in a group may be checked.

## Check Mark

Indicates that an item, such as a menu option or check box, is selected.

## Child Record

In a relational database, a record which is accessed from another record (the Parent Record). A lower-level record is a “child” of a higher-level record. In TeleMagic’s Documentation Database, the Contact Data level record is a child of the Company Data level record.

## Click

To point to an item and then press and release the mouse button quickly. This action is used to select or activate items on the screen.

## Clipboard

An area of memory which stores any data which has been cut or copied. See also: Copy, Cut, and Paste.

## COM Port

The computer socket into which you plug a serial device, such as a mouse or a modem.

## Command

The actual commands contained on a menu which, when selected, instruct TeleMagic to take a particular action. See also: Menu

## Command Line Parameter

An extra piece of information added to the end of a command line (the path and file name specification used to open a program). Command line parameters provide additional startup instructions.

## Compatibility

The ability of different hardware and software to work together. Compatible software would be two applications which are able to work with each other without errors.

## Completed Activity

An activity which has been checked off as having been accomplished.

## Configurable

Any area of the program which can be customized to the user's specifications.

## Configuration File

The file containing information about how a specific application is set up for an individual user or a group of users.

## Contact

A specific person or company about whom you want to store information.

## Contact Based Recall

A recall scheduled with a contact using the RCL field. This field displays the date and time that the contact should be called. Compare: Activity Based Recall

## Contact Browse

A browse table of contact records. See also: Browse

## Contact Database

Where TeleMagic stores all your contact information. Consists of fields, arranged and displayed on one or more pages of the contact view.

## Contact Information

The data stored in a contact record.

## Contact Level

A record's position in a relational structure. TeleMagic allows for three Contact Levels which may be user defined. In the Documentation Database, these are the Company Data, Contact Data, and Contract Detail (Level 1, 2, and 3, respectively.) See: Child Record; Parent Record.

## Contact Manager

The TeleMagic program which allows you to store, arrange, link and display information about contacts.

## Contact Record

All information stored about a contact in a Contact Database.   The contact record includes all data field and any associated on-screen notepads.

## Contact Rollup

A scrollable list of all records from the lower database levels that are attached to the current record in the upper level.

## Contact View

All of the pages that make up one level of a contact database. You can have multiple views of any level that allow you to tailor the way data is displayed for different users.

## Contact Screen Designer

TeleMagic feature which allows complete design and customization of contact views. Accessed from the **Contact Manager** menu.

## Contact Manager Toolbar

The dockable toolbar which appears in the TeleMagic window when the Contact Manager is open. Mainly used to navigate through the records and levels that make up a contact database.

## Control Box

The box in the upper left hand corner of a window, dialog box, or selection box. Double clicking on the control box will usually close the item.

## Control Key (CTRL)

A key on your keyboard which is used with other keys to execute commands.

## Copy

To duplicate information (selections of data or whole databases). The copied information can then be edited without affecting the original. The **Copy** command when used from the **Edit** menu will copy the information from a field into the clipboard. It can then be pasted into another location. See also: Clipboard

## Cursor

When entering data into a field, the vertical bar which indicates where the typed text will appear.

## Custom Report

A fully user defined printout of data from records. In addition to including data, custom reports allow you to add headers, footnotes, illustrations, charts, graphics, and color to report pages.

## Cut

Remove text from its position on the page and store it in the clipboard. Cut text can then be pasted into another location. See also: Clipboard, Copy, and Paste.

## Data

The specific information, such as names, facts, and figures, which you enter into fields.

## Data Access

Permission to see, use, or change information, records, or programs. You can control who sees, uses, or changes your records and databases by granting or denying access.

## Data Backup

The process of copying information on hard disk to floppy disk, tapes, or other types of backup devices. This is a safety feature which ensures against data loss in the event of a system failure. *It is extremely important that you maintain a current backup.*

## Data Entry

To enter information into a record.

## Data Entry Bell

An audible bell which can be set to ring when the end of a field has been reached in data entry.

## Data Field

A box on a data entry (contact) screen which is formatted and labeled to hold a specific piece of information.

## Data Field Assignment

During import process, designating which TeleMagic data fields will correspond to respective data fields in the source database. See also: Data Field

## Data Grouping

In the Report Generator and Sales Forecasting reports, associating groups of data for analysis.

## Database

All the information which you have typed into data entry screens and saved; the entire collection of data records.

## Database Level

In a relational database, the position of a data set in a Database Structure as related to other data sets. A Parent record is at a higher level than a Child record. Also known as a Table (in programming terminology).

## Database Specific

Any settings which will affect only the database in which they were effected.

## Database Structure

The way a program has organized a database to hold information. TeleMagic has a three-level relational structure.

## Database Synchronization

A method of linking two or more databases together to share data, typically used when the databases reside in different installations of TeleMagic. See: Data Synchronization Server

## Data Synchronization Server

Software designed to manage database synchronization for TeleMagic Enterprise.

## Date Field

A field which can only contain valid dates.

## Date Picker Icon

An icon ( ● ) appearing in many TeleMagic dialog boxes and (optionally) on the Contact page next to date fields, which, when clicked, brings up the Go To Date dialog box.

## Day at a Time View

A view in the Activity Manager which allows you to see your schedule for a single day, broken down into a time increment you define.

## dBase

A popular programming language used by many of the programs from which or to which you may need to import or export records. See also: Programming Languages

## .DBF

The file extension generally associated with database files, such as those written in dBase.

## Dedicated Server

The ability to set up a workstation that is dedicated to processing faxes, wireless messages, and word processing documents using the Automation Server.

## Default

Settings, formatting, and options which take effect unless you change them.

## Default Preferences

Configuration settings that will remain valid until changed by the user.

## Default System Printer

The printer to which information is sent as a default.

## Delimited Text Format

In import and export, a file format which separates fields with a delimiter. See also: Delimiter

## Delimiter

The separator between fields in a file. The delimiter, commonly a comma or a tab, tells any program into which a file is being imported where one field stops and another starts.

## Description Fields

Any time a user creates something which will be accessed from a selection dialog box (such as a word processor document or a copy of a database), a description field will prompt for a name to be placed in the selection dialog box. This description is not the actual name under which the information is stored, but is used for internal identification purposes only.

## Dialer

The software used with a modem to automatically dial a contact's phone number. Features in the Dialer are also used to keep track of call productivity.

## Dialog Box

A window which serves one of several purposes: to request information, provide information, present warnings or present an explanation of why a command can not be completed.

## Dimmed

A menu pad selector or option currently unavailable for use.

## Directives

Information which can be merged into a document and is based on something other than a single TeleMagic field, such as the date or a standard address which combines all address fields.

## Directory Tree

The specific path, including the drive and all directories, leading to a program or a file. The map the computer uses to locate specific information.

## Disabled

A menu pad selector or option currently unavailable for use. Disabled options will appear gray or dimmed.

## Disk

The physical space where programs and data are stored.

## Disk Caching

The ability to reserve a certain amount of RAM as a temporary storage place for data that is in use when data is being read from or written to a hard disk.

## Disk Drive

Any of the drives which read data from disks, be they hard disk or floppy disks. Drives A and B are reserved for floppy disks, drive C is the local drive which contains the hard disk. See also: Disk, Local Drive, and Hard Disk

## Dithering

The use of dots, or pixels, of different colors or shades to produce what appears to be a new color. Dithering is used to soften the edges of an image as an anti-aliasing technique, and to add realism to computer graphics.

## DLM

The extension which indicates a file is stored in delimited text format. See also: Delimited Text Format

# Documentation

The instruction manuals and help files which assist you in using your software or hardware.

## Dockable Toolbar

A toolbar which can be repositioned by dragging (like a window or dialog box). Most dockable toolbars can assume a variety of rectangular shapes by using the sizing feature. Dockable toolbars are sometimes referred to as ‘docking toolbars’ and ‘undockable toolbars’.

## Dot-Matrix Printer

A printer which interprets text and images as a series of dots. Not recommended for use with TeleMagic.

## Double-click

To point to an item, then press and release the mouse button twice in quick succession.

## Drag

To hold the mouse button depressed as you move the mouse.

## Drag and Drop

To hold the mouse button depressed as you move the mouse, then release the button when the pointer has reached a specific place on the screen. This is used to move a selected item around on the screen.

## Edit

To change existing text or an existing object.

## Edit Mode

In the Contact Manager, you can only enter and edit data when in edit mode. Activate edit mode by clicking the Edit button on the Contact Manager toolbar, by pressing ALT+E or by clicking anywhere in the contact record.

## Edit Order

The order in which fields in a screen become active when you TAB through them.

## Electronic Mail

On a network, correspondence from one computer to another.

## Ellipsis

Three dots (**...**) following a menu option, indicating that whenever the option is selected, a dialog box will open.

## E-mail

Electronic mail. On a network, correspondence from one computer to another.

## Embedded Object

An object (picture, graph, spreadsheet, etc.) created in one application and displayed in another. An embedded object can be edited whenever displayed by double-clicking it to open the application used to create it.

## EMS

*Expanded Memory.* An area of additional memory which stores data in files kept separate from the base memory and only brought in when needed. A small portion of base memory is reserved for this data.

## Enter Data

To put information into a field or document.

## Error Log

When a problem arises in TeleMagic the user can log the system status which will create an error log, or a record of what the user was doing at the time of the error, what went wrong, and the user's system configuration at the time of the error.

# Error Report

A printout of every error log currently in the system.

## ESC

On the keyboard, a key used to exit or undo an action.

## Exclusive

The ability to open TeleMagic for the sole use of a single user; once the program is opened exclusively, other users are locked out of it until the exclusive user's session is ended. Do Not use this feature if there are other users already working with TeleMagic!

## Executable File

A file ending in the extension .EXE used to run an application.

## Exit

To close TeleMagic or a related program.

## Expanded Memory

(EMS) An area of additional memory which stores data in files kept separate from the base memory and only brought in when needed. A small portion of base memory is reserved for this data.

## Export

To save data so that it can be read by and imported into another application.

## Export Format

A format designed by the user to determine how a file will be exported. An export format includes field specification, the location and name to which to create the export file, and the format of the exported data (i.e. Standard Data format, Delimited Text format, dBase, etc.).

## Expression

A string of characters which, when evaluated, generate a new or specific piece of information.

# Expression Builder

A dialog box that helps you in creating your own expressions.

## Extended Activity

An activity which spans multiple days.

## Extended Memory

Additional memory which can be added to your system and behaves in the same way as base memory.

## Extension

The three-character designation at the end of a file name that generally indicates the purpose of the file. For example a file with the extension .TXT is a text file; the extension .EXE indicates an executable (program) file.

## External Document

A document or other file created in an external application that can be faxed from TeleMagic.

## External Program

An outside program which can be accessed from within TeleMagic.   Word processors are examples of external programs.

## External Rebuild

A rebuild executed from outside TeleMagic Enterprise. See also: Rebuild

## Fax

To send text and graphics over the phone line. TeleMagic comes with a fax program which, when connected to a faxmodem, can fax documents.

## Fax Board

An internal peripheral device used for faxing. While some fax boards also allow additional communication functions, such as dialing the phone, many are used exclusively for faxing. See: Modem, Faxmodem.

## Faxmodem

A modem used for faxing, which can be internal or external. A faxmodem can also be used as a regular modem to access phone lines for additional communication purposes, but not all regular modems will allow you to send faxes. See: Modem

## Field

A box on a contact page or dialog box which is formatted and labeled to hold a specific piece of information.

## Field Assignments

In import, associating source fields with target fields so data will be brought into TeleMagic in the proper layout. See also: Import, Source Field, and Target Field.

## Field Length

The total number of individual characters (letters and numbers) which can be stored in a data field. If you type more characters than will fit in the designated field length, the extra characters you type will not be saved.

## Field Name

The name of a field as referenced by TeleMagic (similar to a file name). Compare: Field Prompt

## Field Prompt

A standard English description which usually appears on a contact screen near a field, indicating what data belongs in that field. Field Prompts are defined when a field is added to the database. Compare: Field Name

## Field Search

A filter option which allows you to create a filter on the fly.

## Field Type

A field type is assigned to each field indicating the kind of data stored in the field. See*:* Character Field, Logical Field and Number Field.

## Field Validation

You can set up validation criteria to establish what kind of data may be entered in a field. When entering data, TeleMagic will check to be sure that you have entered the right kind of data into a field.

## File

Where information is stored. The last branch of a directory tree. See also: Directory Tree

## File Name

When information is stored to a file it is given a unique file name for identification purposes. If you are prompted to enter a file name for something you are creating, you can enter any name you like and the information will be stored on disk under that name. File names cannot be longer than eight characters, followed by a period and a three-character extension. They cannot contain special characters. When you are prompted to enter a file name for information for which you are searching, you need to enter the name under which the information was stored. This tells the program where to find the file.

# Fill

Report Generator and Screen Designer feature that allows you to select a pattern and color for the inside of objects. See also: Fill Color and Fill Pattern

## Fill Color

In the Report Generator and Screen Designer, the color of a fill pattern that is used inside objects. See also: Fill Pattern

# Fill Pattern

In the Report Generator and Screen Designer, the pattern which is filled into rectangles, circles, and squares.

## Filter

A quick way to select only a few contact records to appear in a report, list, on-screen as you flip through records, etc. The records selected must match all criteria specified by the filter in order to be selected.

## Filter Analysis

Analyzes a filter to see how many records meet the filter criteria.

## Filter Count

A count of how many records are in a filter based on the last filter analysis.

## Filtered Indexes

An Index with a filter built into it. Using a filtered index will dramatically speed up database functions by dealing with records in the filter as if they were the only records in the database.

## Flat File

A non-relational database. Each record stands alone and cannot be connected to any other record.

## Floppy-Backup

A backup to floppy disks. See also: Backup

## Floppy Drive

Disk drives A and B which have been reserved for floppy disks.

# Font

In typography, a complete set of type sizes and character typefaces. For example, one popular standard font is 10-pitch Courier, another is 12 point Times Roman.

## Font Size

The size of a character measured in points. The higher the number of point, the larger the font size.
Example: 8 points, 12 points.

## Font Style

The typeface used to define a font. Examples of font style would be **bold face**, or *italic.*

## Footer

Text which will appear on the bottom of every page of a report or other document.

## Forward Control

The button on the Contact Manager toolbar with an arrow pointing to the right. Used to move forward through the records in order of the active index.

## MAPI

MAPI stands for Messaging Application Programmer Interface, a software development standard for e-mail programs. TeleMagic Mail only supports Simple MAPI, not Extended MAPI

## FoxPro
The programming language in which TeleMagic is written.

## Function Key

The keys numbered F1 through F12 located across the top of the keyboard.

# General Field

A General Field is one which can contain OLE objects such as pictures, spreadsheets, or word processing documents.

**Note**

The General Field does not actually contain the OLE object. Rather, it contains a reference to the OLE object to be displayed.

## Gigabyte

One gigabyte (1G) is equal to 1,073,741,824 bytes or 1,000,000K (kilobytes) or 1000M (megabytes).
See also: Byte, Kilobyte, and Megabyte.

# Global Settings

System settings which pertain to all users.

## Go To Date Dialog Box

In the Activity Manager, a dialog box which resembles a calendar and allows you to quickly select a date to view. In the Contact Manager and other areas of TeleMagic, it allows you to select a date to enter into a date field.

## Go To Time Dialog Box

In the Activity Manager, a dialog box which resembles a digital clock and allows you to quickly select a time to view. In the Contact Manager, it allows you to select a time to enter into a time field.

## Goto

A command which allows you to find records quickly by searching on specific data.

# Grid

In the Report Generator and Screen Designer, an invisible section of crossing vertical and horizontal lines to which objects are aligned.

## Group Delete

To simultaneously delete a preselected group of records.

## Group Recover

To undelete every record in a filter which has been deleted since the last rebuild.

## Group Replace

To simultaneously edit a preselected group of records, so that changes can be made to all selected records.

## Hard Disk

The permanent disk which is connected to your computer where programs and files are stored.

## Hardware

Tangible computer equipment, such as the keyboard, mouse, monitor and the computer itself. Your hardware must have certain physical capabilities for TeleMagic to work correctly. See: Software.

## Hayes-compatible

A modem or faxmodem which recognizes the standard Hayes commands.

## Header

Text which will appear on the top of every page of a report or other document.

## Help

On-line documentation which can be accessed from within the program to answer questions concerning the program's use. (This *Glossary* is part of the on-line help.) See also: Documentation

## Help Index

A screen which gives you a list of help topics you can access. Click the **Contents** button at the top of this window for the list of TeleMagic help topics.

## Highlight

Indication that an item is selected. Highlighted objects usually appear surrounded by dark shading.

## Hot Keys

The underlined key in a dialog box or menu that activates the related command. Press ALT plus the hot key to select an option instead of clicking on it with the mouse. Not all hot key combinations work on all keyboards. Most hot key combinations are not recognized or have different effects when using Dvorak and certain non-US style keyboards.

# Icon

Small picture which represents a Windows application, group of applications, document or embedded object.

## Import

To bring a file created in one application into another application.

## Import Format

A format designed to control the import of data into TeleMagic. The import format lists where the source file is stored, under what name, and the format in which it is written (i.e., Standard Data format, Delimited format, dBase, etc.). It also assigns the source fields to target fields in the TeleMagic database to which you are importing. See also: Import, Source Field, and Target Field.

## Index

A record sort order based on a particular field. For example, you can sort chronologically by recall date, or alphabetically by company name.

## Ink-jet Printer

A printer which is capable of producing high quality fonts and graphics. Ink-jet printers are recommended for use with TeleMagic.

## Install

Making a copy of program files onto your hard disk in a format which your computer can read and use. During installation, you have the opportunity to make certain choices about how your program will work.

## Installation Preferences

Preferences that affect the entire installation of TeleMagic. Only Supervisor users may edit Installation preferences.

## Integration

In TeleMagic, using another program or application within TeleMagic. See also: Word Processor Integration

## Intensity

The degree of apparent brightness of a screen or display element.

# Internal Rebuild

To run a rebuild while TeleMagic is open. You can select which (any or all) of the databases are to be rebuilt. Only the current user files are rebuilt with an internal rebuild. See also: Rebuild

## Key Fields

A TeleMagic preference that allows you to specify which fields you use to store “key” data. You must have Key Fields set up to use many of the features of TeleMagic.

## Kilobyte

One kilobyte (1K or 1KB) is equal to 1024 bytes. See also: Byte, Gigabyte, and Megabyte.

## Label

On screen text, often used to indicate the contents of a data field. Alternatively, a standard report option that allows you to print address information to a mailing label.

## Landscape

A paper orientation option which prints 11” wide by 8 1/2” long.

## Laptop

A small, portable computer. Commonly used as a remote database site in Database Synchronization.
See also: Database Synchronization and Remote Database

# Laser Printer

A printer which is capable of printing high quality fonts and graphics. It is the recommended printer for use with TeleMagic.

## Layout

Arrangement of graphics and text on a page. Particularly important when using the Report Generator

## Layer

In the Screen Designer, the position of an object relative to other, overlapping objects. To layer an object is to decide in which order it will be selected, relative to overlapping objects, when clicking TAB key to move through the fields on a page.

## Lead Time

The amount of time before a scheduled activity when the alarm is set to go off. Used to provide the user time to prepare for the scheduled activity.

## Level

In a relational database, the position of a data set in a Database Structure as related to other data sets. A Parent record is at a higher level than a Child record. Also known as a Table (in programming terminology).

# Level Selector

The buttons on the Contact Manager toolbar which are used to change levels.

## Level Specific

Any setting which can be set uniquely for each level. A level-specific setting will not be in effect when you change levels unless it has been set on that level as well.

## Licensed Users

The number of users who can access TeleMagic Enterprise simultaneously. You can exceed the number of licensed users when creating users, but only the allotted number will be able to log in to TeleMagic at the same time.

## List Arrow

A button (  ) indicating that a list of selections are available to choose from.

## List Box

A box listing available pre-defined choices for a particular field. . A pop up list box for a field appears when you press F2.

## Literal Characters

When creating a template for a field, you can hard-code characters into the field. These literal characters will always appear in the field in the same place. You only be able edit or remove this data by changing the field's template.

## Local

This adjective usually describes something stored on or working from the current workstation. For example, a local faxmodem means a faxmodem that is installed on your workstation; storing a database locally means putting its files on your workstation’s hard drive (usually named C:).

## Local Drive

The drive containing your hard disk, generally the C: drive found on your local workstation. The opposite of a network drive. See also: Network and Network Drive

## Locked Record

A record which is in use by a user and is not available to other users.

## Logical Field

A data field which stores the answer to an either/or question, such as Yes/No or True/False.

# Login

To record your user ID and password when opening an application. You are required to login when opening TeleMagic.

## Macro

A stored set of instructions that can be invoked by inputting one special key combination.

## Mail Merge

Combining specific information (field data) from records with form letter text to produce documents for mass mailing.

## Marked Record

The record which has the `Marked` check box on the Contact Manager toolbar checked. Marking is used as an easy way to return to a record during the course of a work session.

## Marquee

In the Report Generator, a rectangle with dotted lines drawn around objects to select them for editing.

## Mask Characters

When adding a new field, you create a template for the field. The template specifies what information can be contained in each position of the field. Mask characters are used in templating to stand in for types of data. For example, 9 is a mask character that means the data entered into this space in the field must be a number. (The data entered into the field does not necessarily need to be a 9.)
Compare:   Non-Mask Character

## Master Password

In the Automation Server, one of two passwords that can be set. When the Master Password is used to log into the server, you will unrestricted access to all server options. Compare: Options Password

## Master Template User

A simulated user which has been set up for the purpose of copying preferences to actual TeleMagic users. Creating a Master Template User for various preference sets is a way to save time and avoid having to manually enter the same preferences for a group of users.

## Maximize Button

The small box containing an up arrow at the right of the title bar. Click the button to enlarge a window to full screen size.

## Megabyte

One megabyte (1M) is equal to 1,048,576 bytes or 1,000K (kilobytes). See also: Byte, Gigabyte, and Kilobyte.

## Memo Field

A scrollable field used to store free-form text.

## Memory Manager

A program which manipulates your computer's resources to enable you to get the maximum memory efficiency.

## Memory Variables

Instructions which tell the Report Generator how and where to store various calculations made during the printing of a report.

## Menu

A list of choices that activate TeleMagic commands.

## Menu Bar

The horizontal bar located at the top of the screen which displays titles of available menus. Menus are opened from here.

## Menu Command

The actual commands contained on a menu which, when selected, instruct TeleMagic to take a particular action. See also: Menu

## Menu Options

The actual commands contained on a menu which, when selected, instruct TeleMagic to take a particular action (also known as Menu Commands). See also: Menu

## Menu Pad

The drop down menu option list which appears below a selected menu bar item. The menu options are displayed on the menu pad.

## Merge

To replace a placeholder (merge field) with actual data from a contact record, activity record, or other area of TeleMagic. See also: Place Holder

## Merge Field

Field which can be merged into a document. See also: Place Holder and Merge

## Message Box

A pop-up box which tells you the status of a TeleMagic operation.

## Minimize Button

The small box containing a down arrow at the right-hand side of the title bar. Click this button to shrink a window to an icon.

## Modal

Any dialog box which becomes the only active window; you are not able to access other areas of the program while such a dialog box is open.

## Modem

A peripheral device that links your computer to other computers using telephone lines.

## Monitor

A device, similar to a television screen, that displays whatever the computer is working on. The monitor allows users to see and act upon programs.

## Month at a Time View

In the Activity Manager, the view which allows you to see your schedule for any given month.

## Mouse

A small peripheral device used to control an on-screen pointer. The pointer's movements correspond to the movements of the mouse.

## MS-DOS Prompt

A window that allows you to enter MS-DOS command directly. In Windows NT, this is called the Command Prompt.

## Multitasking

The ability to run several applications at one time. Windows allows multitasking.

## Multi-User

An installation of TeleMagic which is licensed to allow access to more than one user at a time.

## NANP

*North American Numbering Plan.* A dialing plan used throughout North America to specify what constitutes a local and long distance call.

## Natural Order

The order in which records were added.

## Network

A group of computers connected by cables which uses special software to share equipment and exchange information.

## Network Administrator

The main user who installs and maintains a TeleMagic database or a network.

## Network Drive

A hard disk accessible by the network. The opposite of a local drive. See also: Local Drive and Network

## Network Rights

On a network, the security rights which grant a user access to specific drives and directories.

## Network Server

The computer station devoted to processing commands on and to the network.

## Next Call

An optional field showing the next telephone call to a contact scheduled in the Activity Manager.

## Non-Mask Character

When adding a new field, you create a template for the field. The template specifies what information can be contained in each position of the field. Non- mask characters are characters that TeleMagic will display as-is in the field (also called literal characters). The parentheses in phone fields are an example of non-mask characters. Compare: Mask Characters

## Non-Network Drive

The drive containing your hard disk, generally the C: drive found on your local workstation. The opposite of a network drive. See also: Network and Network Drive

## Non-Relational

A database which does not provide multi-levels, and does not allow you to connect parent and child records.

## North American Numbering Plan

A dialing plan used throughout North America to specify what constitutes a local and long distance call.

## Notepad

A special memo field (scrollable text field) that allows you to track information about activity related to a contact.

## Notebook Record

A free-form text record not associated to any particular contact. Often used to store reference information, such as scripts, ZIP codes, personal notes, or company goals.

## Notepad Stamp

To automatically enter the User ID, time, and date preceding a notepad entry. Achieved by pressing ALT+N in a notepad.

## Number Field

A field into which you can only enter numbers. These fields are useful when you want to keep track of true numbers (dollar amounts or square feet).

## Numeric Field

A field into which you can only enter numbers. These fields are useful when you want to keep track of true numbers (dollar amounts or square feet).

## Objects

Items such as pieces of text, drawings, graphs, spreadsheets, and pictures, which can be linked or embedded from other applications.

## OLE

*Object Linking and Embedding.* Object edit, update, and embedding. The ability to display objects created in one application in another application.

## On-Screen Notepad

A special free-form memo field that can be added to the database and set up in Key Fields which is linked to the auto dialer, faxing, and word processing to allow you to track contact related activity. See also: Key Fields

## Open

To activate an application or show the contents of a file.

## Options Password

In the Automation Server, you can set up two different passwords: a Master Password and an Options Password. When you start the Automation Server using the Options Password, you will be prompted to input it again every time you try to access another area of the server; for example, when you try to go into Maintenance mode. When you start the Automation Server using the Master Password, you will not be prompted for a password again during this session. Use the Options Password in a network environment if you want to allow users to view the progress of faxes and wireless messages, but not interfere with server operations; use a Master Password if you are not concerned with what other users might do with the Automation Server.

## Owner

The user who creates an activity, whether he or she completes it, or assigns it to another user to complete.

## Packing

The process in rebuild which removes deleted records and blank spaces, thus minimizing storage space and maximizing program speed. See also: Rebuild

## Page

At any level, one screen-full of information. There can be multiple pages in any view.

## Page Layout

In the Report Generator, a menu option which allows you to control the layout of a report. See also: Layout

## Page Name

The title of one page of a view as designated in the Screen Designer.

## Page Orientation

Determines if the printer uses portrait mode or landscape mode. See also: Portrait and Landscape.

## Pager

A wireless messaging device. See also: Wireless Messaging

## Pager #

The Carrier Phone # used in Wireless Messaging. The number TeleMagic needs to dial to send a user a page.

## Pager ID

The Pager Personal Identification Number or Pager PIN used in Wireless Messaging. The unique ID assigned to your pager.

## Parameter

An extra piece of information added to the end of a command line (the path and file name specification used to open a program). Command line parameters provide additional startup instructions.

# Parent Record

In a relational database, a record with related lower-level records. A parent record contains data common to all related child records on the lower level. In TeleMagic's Documentation Database, the company-level record is the parent of the contact-level record.

## Parse

When importing records in Standard Data format, all data appears as a single field and must be parsed, or divided into separate fields.

## Password

An alphanumeric string which a user must enter to gain access to TeleMagic.

## Paste

To insert the contents of the clipboard at the cursor, either by selecting **Paste** from the **Edit** menu, or by pressing CTRL+V. See also: Clipboard

## Path

The list of directory and sub-directory names that defines the location of a file.

## PC

Personal Computer.

## Pen

In the Report Generator and Screen Designer, the line used in squares, rectangles, and circles.

# Pen Color

In the Report Generator and Screen Designer, the color of the line used in lines, squares, rectangles, and circles.

## Pending Activities

Activities which have not been completed. See also: Activities

## Pending Activity List

A browse list of incomplete activities available in the Contact Manager. You can view, edit, and call on your pending activities directly from the Contact Manager.

## Pending E-mail

E-mail which has been written to send at a later time.

# Personal Organizer Pages

Pages which are designed to fit in a day planner or address book. A number of the options on the **Reports** menu are designed to print on organizer pages, which can then be transferred to your personal organizer book.

## Phone Field

A data field which is formatted to contain a phone number. See also: Data Field

## Physical Memory

The amount of RAM on a system. See also: RAM

## Pixels

Individual points of color on a screen arranged to display text and graphics. The smallest unit of a picture which can be edited.

## Place Holder

In a document or report, the indicator of a merge field, which is replaced by actual contact data when merged.

## Point

To position the pointer by moving the mouse.

## Point and Click

To move the mouse so that the pointer is positioned over an item, and then press and release the mouse button quickly.

## Point Size

The size of a character measured in points. The higher the number of points, the larger the point size.
Example: 8 points, 12 points.

## Pointer

The movable on-screen arrow controlled with a mouse, used to indicate where a cursor should be placed or for what option an action should be performed.

## Pop-up Boxes and Windows

Usually refers to lists that can be caused to appear (or pop up) by pressing certain keys. In the case of TeleMagic list boxes, press F2.

## Portrait

A page orientation which prints 8 1/2” wide by 11” long.

## Ports

The computer socket into which you plug a serial device, such as a mouse or a modem.

## Positioning Arrow

In configurable lists (such as the **Reports** menu's Configuration dialog box), an arrow which allows you to rearrange the order of items on the list.

# Pre-Defined Reports

A selection of useful reports which come with TeleMagic and are based on the fields in your database.

## Preferences

User-defined configuration options. You can set preferences to determine which screens your program opens to; the order in which you input data; which buttons appear on the toolbar; and many other aspects of TeleMagic.

## Prefix Override Character

In a phone field, a character which tells TeleMagic to ignore any Dialer preference settings and dial the number exactly as it appears.

## Printer Settings

The configuration of the printer being used. These generally include, among other things, which printer to use, how many copies to print, and the page orientation.

## Priority

In the Activity Manager, the order of importance of To-Do's; also used as a way to group Activities and To-Do's for printing reports. In faxing, setting a priority allows you to have your fax take precedence over other faxes in a queue.

## Productivity Tracking

The ability in TeleMagic to create reports which gauge user productivity. Activity reports and Sales Forecasting reports can both be used to perform productivity tracking.

## Program Group

In Windows, a set of (usually related) application icons that are stored in the same window. Clicking on the program group Icon with the appropriate name will open the program group window and display a set of program icons.

## Program Group Window

The window which displays a group of related program icons.

## Program Icon

The graphic that represents an application. Double-clicking on this icon starts that particular application.

## Programming Languages

The computer languages in which applications and programs may be written. TeleMagic is written in FoxPro.

## Prompt

A pop-up box which instructs you to take an action. Also, another name for a field prompt. See also: Field Prompt

## Proportional Font

A font which does not have a specified number of characters per inch. Each character uses only the space it needs, as opposed to non-proportional fonts in which there is a specified number of characters per inch and every character is assigned the same amount of space, regardless of its size. This is a proportional font. This is a non-proportional font. See also: Font

## Pulse Dialing

An older, slower method of dialing associated with rotary phone systems.

## Push Button

An on-screen tool (usually containing a key word or picture) which graphically represents an action. Clicking on a button starts the action associated with that button.

## Queue

A holding place for items that will be dealt with at a later time. For example, faxes and Wireless Messages that are going to be processed by the server are held in a queue until the server processes them. External documents that are going to be included in a fax are printed and held in a queue until the fax is sent.

## Quick List

A quick report. *Quick Lists* allow you to specify which records to use, which fields to print, in what order data should appear, and how data should be laid out on the page. See: *Custom Report*.

## Quick Order

In the *Contact Screen Designer*, an option which causes TeleMagic to automatically designate in what order the tab key will move the cursor through data fields.

## Quick Report

A Report Generator option which allows you to select a number of fields to appear in a report and allows the Report Generator to arrange them for you, instead of having to enter each one manually. Fields can then be arranged and other Report Generator features can be incorporated into the report. See also: *Custom Report*.

## RAM

Random Access Memory. The area of memory where programs are actually run.

## Radio Button

A hollow circle followed by text. When a radio button is selected a solid mark appears in the center of the hollow circle. Only one button in a group may be chosen at any given time.

## RCL Field

*See: Recall Field.*

## Re-Indexing

During rebuild, TeleMagic sorts and re-numbers the records in an index. This is especially important if a large number of records have been deleted. See also: *Rebuild*.

## Read-Only

Files which can be viewed but not changed.

## Readme

A file which contains the very latest information about the application. Any changes to the application which occur after the documentation has been printed will be referred to in the README file.

# Rebuild

To remove deleted records, reindex and pack a TeleMagic database for quickest operation and minimum size.

## Recall

An activity type which enables you to input the date and/or time you have another activity related to a contact.

## Recall Date

See: *Recall*.

## Recall Field

A Recall or RCL field is used to create a *contact based* recall (as opposed to an *activity based* recall). It allows you to store the next recall date and time directly in the Contact Manager.

## Record

All related information for a particular company or contact.

## Recurring Activity

An activity which is scheduled to occur multiple times at a given interval, such as once a week or annually.

## Record Descriptor

A record descriptor is an expression that defines a record. It will usually consist of a combination of text and fields. For company records, you may want to use the field that contains the company name. For records designed to contain an invoice, you may want to use the invoice number. (It is suggested that you include text to identify the contents of the field if it is not readily identifiable.) For example, the descriptor for a Level 3 record in the Documentation database may be: **Contract Number: con9606180074**. The default record descriptor will use your key fields to return `Contact` at `Company` (e.g., Blair Corey at Academe).

See Key Field Preferences for more information.

## Registration

To officially log yourself as the owner of your TeleMagic software with its unique serial number. You must be registered to receive technical support and use TeleMagic to its full capacity.

## Relational Database

A multi-level database which allows you to connect parent records to child records.

## Remote Database

In Database Synchronization, a database into which information from the central database is placed, which can then be used at an outside location. See also: *Database Synchronization* and *Central Database*.

## Report Generator

The TeleMagic program which allows you to design and edit *Custom Reports*.

## Resolution

The degree of sharpness of a printed or displayed image. In printing it is often referred to in DPI, or dots per inch. When referring to display resolution it is usually referred to in terms of pixels. The higher the resolution, the sharper the image.

## Restore Button

The small box containing an up and down arrow at the right-hand side of the title bar. The button appears after you have minimized or maximized a window. When selected, the window is restored to its previous size.

## Resource

A *Resource*, in the context of TeleMagic's Activity Manager, is anything which is not reserved for the exclusive use of a particular person or group. The use of a resource, therefore, introduces the potential for a conflict of interest. Examples of resources include: conference rooms, audiovisual equipment, and vehicles.

## Reverse Control

On the Contact Manager toolbar, the back arrow which allows you to view the previous record in index order.

## Rollover

In the Activity Manager, an incomplete To-Do will continue to “rollover” to the next day until it has been completed.

## Rollup

A type of *Contact View* field which displays information on a Parent-Level *record* from associated Child-Level *records*.

## Run

To start an application.

## SDF

See: *Standard Data Format*.

# Sales Forecasting

The Sales Forecasting feature keeps track of projected and actual sales, and relates those sales to contact records in any TeleMagic database. It also includes several pre-formatted reports, which can be used to predict sales trends, analyze sales forecasting accuracy, and evaluate the performance of your salespeople. See Forecasting Sales.

## Save

To store information on a disk.

## Screen

All of the pages which make up one level of a contact database.

## Screen Designer

See: *Contact Screen Designer*.

## Screen Set

The set of screens designed for viewing a database. A database can provide selections of multiple screen sets for a database level, which offer layout alternatives for the same information.

## Screen Tools

The buttons in the *Contact Screen Designer* Toolbox which allow you to designate which mouse action you want to perform during screen design.

## Scripts

Prewritten text used by salespeople, customer service representatives, and others to answer questions or provide information on specific topics. See Branch Scripting.

## Scroll

To move through data being viewed.

## Scroll Arrows

Arrows located at the top (up arrow) and bottom (down arrow) of the right edge or left and right bottom edge of windows and list boxes. Click on the arrows quickly to move the screen up/down or left/right one line at a time. Click and hold the mouse button down to move the screen up/down or left/right rapidly.

## Scroll Bars

Located along the right edge and along the bottom edge of windows and list boxes when they contain more information than can be seen on one screen.

## Scroll Box

A small box between the scroll arrows on a scroll bar that indicates what part of a list or document is currently displayed. Click on the scroll box and drag it along the scroll bar to move quickly through a document or list.

## Search

To give instructions to locate a specific piece of data or a specific record.

## Security

The system which grants or denies a user access to information stored on the computer.

## Select

To highlight an object in a list box, menu pad, or dialog box using the SPACEBAR, ARROW keys, ENTER key or mouse. Compare: *Click* .

## Selection Box

A type of dialog box which displays a list of existing items (e.g., databases, reports, screens, formats) which can be affected by displayed buttons.

## Selection Marquee

In the *Report Generator*, a rectangular box with broken lines displayed around selected objects.

## Serial Number

The number assigned to your software which uniquely identifies it.

## Server

A piece of software that automates handling tasks in one or more other pieces of software. A server in Data Synchronization is used to perform the synchronization process. The TeleMagic Automation Server is used to process faxes and Wireless Messages.

## Session

The span of time from when you access TeleMagic to when you close it.

## Settings

The specific configuration of hardware or software.

## Shareable

In a network, databases or files which multiple users can access.

## Shortcut Key

A key combination that allows you to choose a menu option without displaying the menu. For example pressing CTRL+C performs the same action as selecting **Copy** from the **Edit** menu.

## Single User

An installation of TeleMagic which allows access to only one user at a time.

## Sizing Border

In the *Contact Screen Designer* and *Report Generator*, a visible, thickened border which appears when an object is selected. Used to change the object's size by dragging or using CTRL+ARROW keys.

## Sizing Handle

In the *Contact Screen Designer* and *Report Generator*, a small box which appears at the corner(s) of a selected object. Used to change an object's size by dragging.

## Snap

To cause an object to automatically move to a specified point. For example, in edit mode if the cursor is placed in the middle of an empty field it snaps to the beginning of the field.

## Snap-to-Grid

In the *Contact Screen Designer* and *Report Generator,* a menu option which, when checked, causes TeleMagic to "snap" selected object sizing to an invisible grid with lines the same height and width as one character of the default screen font.

## Snooze

To temporarily turn off an alarm until a later time. The amount of time the alarm stays off is determined in Activity Preferences.

## Software

Intangible computer equipment, such as programs and data. Information stored on disks and hard disks or present in the computer’s memory is software. See: *Hardware*.

## Sort, Sort Order

To place records in a particular order. See: *Index*.

## Source Database

In Import, the database which originally contained the record to be imported. Information from that database is then exported to a file, and the file is imported into TeleMagic Enterprise.

## Source Field

In Import, the fields in the file you are importing into TeleMagic.

## Source File

In Import, the file you are importing into TeleMagic.

## Spinner Arrows

Two small arrows  at the edge of a data entry field (usually date or numeric). Clicking on these arrows will increase or decrease the number currently displayed in the field.

## Split Box

A black band on the scroll bar of a browse table which allows you to split the table and scroll parts of the record independently.

## Stamp

See: *Notepad Stamp*.

## Standard Address

In the Write Interface, a merge option which merges all address fields as a unit.

## Standard Data Format

In Import and Export, a data format which separates the fields by the number of characters (which includes data and empty spaces) contained in the field. Standard Data Format uses no delimiter.
Compare: *Delimited Text Format*

## Status Bar

The space at the very bottom of a window which displays current information, such as time, position, or directions, for using a particular program feature.

## Supervisor

A user with rights to all TeleMagic features.

## Supervisor Preferences

Preferences to which only Supervisor users have access. These include System ID setup and User setup.

## Supervisor User

A user with full security access to TeleMagic Enterprise.

## Swap to Disk

When all of the RAM resources are being used, the system will swap to disk, or use hard disk space as RAM. This slows down the operation of TeleMagic and should be avoided if possible.

## Synchronization

The ability to have a database in TeleMagic interact with data from another database, whether it is from another TeleMagic installation (through Data Synchronization Server) or a non-TeleMagic application. This link with another database allows for a time and effort savings by to reducing the duplication of effort. See also: *Database Synchronization*.

## System Administrator

The main user who installs and maintains a TeleMagic database or a network.

## System ID

The ID which identifies and distinguishes each installation of TeleMagic.

## System Information Screen

Part of the **Help** menu, this screen provides valuable information on your local and system configuration.

## System Reports

A set of reports designed for the System Administrator which gives information concerning the setup of TeleMagic Enterprise V4.

## System Resources

The amount of memory resources that Windows allocates for its internal functions. The amount of available system resources affects the speed of TeleMagic; with more resources available TeleMagic works faster.

## Tab

To press the TAB key on the keyboard. In data entry, tabbing moves the user through the fields.

## Table

See: *Database Level*.

## Tagged Records

A set of records which have the Tagged check box marked and can be grouped together in filters. Tags are user specific.

## Tape Backup System

A system of backup which stores a large volume of data on a single tape cartridge.

## Target Directory

In export, the directory to which you are sending an exported file. In import, the directory into which you are importing.

## Target Field

The field into which a specific piece of data will be imported.

## TeleMagic Root Directory

This directory contains all of the sub-directories used for databases, users, data synchronization, etc. There are not normally any files stored here.

## Template

A framework on which like items may be based. In TeleMagic, a field template is the structure of the field, including what information can be entered into any given space in the field. A database template is the structure of the databases. In word processing, a template is a document on which you can base other documents. In security, it is a user that is used to create new users through copying that have a specific set of preferences and security rights.

## Templated Field

A field which has information hard coded into it. For example, the parentheses in a phone field are part of a template.

## Text Box

A box that indicates an editable text area. Click in the text box to position the cursor, then type.

## Title Bar

The colored bar at the top of each window which displays the name of the window.

## To-Dos

In the Activity Manager, scheduled events which have no specific time for completion.

# To Time Dialog Box

In the Activity Manager, a dialog box which allows you to go to a specific time in Day or Week at a Time view.

## Toggle

A single option which produces one result when activated and another when deactivated. Also used to refer to the Windows feature that allows you to use the ALT+TAB keys to switch between two or more open applications.

## Toolbar

The row of icon buttons at the top of your TeleMagic screen which are used to perform specific tasks.
See also: *Icon*.

# Toolbox

In the *Contact Screen Designer* and *Report Generator*, a set of *Icon* buttons (tools) used to design, layout, format screens, and reports. Toolboxes are not user defined, and are not available elsewhere in the program.

## ToolTips

A small balloon which contains the name of a tool. A ToolTip will appear if the mouse cursor is left over a control for a brief time. ToolTips are also called Hints, Hint Balloons, Balloons, and Tips.

## Trackball
Similar to a mouse, but the directional ball is moved by hand not against a mouse pad.

## Transaction Logging

A process which occurs at a site which is under synchronization. Transaction logging does not occur until an initialization packet has been processed.

## Truncated Data

Data which has been cut off and lost, usually in import.

## Unique Number Field

A field in which TeleMagic generates a unique number based upon a user (installer) defined template. In the Documentation database customer ID’s and contract numbers are all examples of Unique Numbers.

## Update

To create a new (or updated) version of a file. To replace an older version of a program with a newer one.

## User

The person using an application.

## User-Defined

Anything which has been customized by the user.

## User ID

A three-character code (often initials) identifying a particular user. Entered when you login to the program or select **Change User** from the **File** menu. TeleMagic uses the user ID to store preferences and security settings (permissions or "rights").

## User Monitor

A screen available off the **Help** menu that allows supervisor users to monitor the activity in TeleMagic.

## User Preferences

Those configuration options which affect only one user -- the user who set them up. See: *Preferences*.

## User Setup

To add a user and set his or her *preferences*.

## User Specific Settings

Settings which pertain to the current user only.

## Validation

See: *Field Validation*.

## Validity Checking

In list boxes, data must match one of the list box entries if the field validation option is selected.

## View

All of the pages that make up one level of a database. Any database level may have multiple views.

## Virtual Memory

A process where data stored in RAM is temporarily placed on the hard disk, freeing up RAM for other uses. See also: *RAM*.

## Visible Alarm

An alarm which appears as a dialog box on screen. See: *Alarm*.

## Warnings

Pop-up boxes that alert you to a potential problem with your present course of action.

## Week at a Time View

A view in the Activity Manager which allows you to see activities and To-Dos in one-week blocks.

## Window

The area that displays information on the screen. You can open or close a window, change its size, and edit its contents.

## Window Sizing

The ability to size the TeleMagic window using the **Restore** button.

## Windows

Microsoft operating systems which allow you access to multiple programs and applications simultaneously.

## Windows 95

An upgrade release of the Windows operating system. See also: *Windows*.

## Windows Write

Word processing software that is included with the Windows 3.1 and prior operating systems. See also: *Word Processing*.

## Wireless Messaging

The ability to send a message to a personal paging device from TeleMagic.

## Wireless Messaging Service

A Paging Carrier. A company that provides local carrier terminals to receive a wireless message and remote messaging terminals which transmit the wireless message to the receiving party.

## WordPad

Word processing software that is included with the Windows 95 and later operating systems. See also: *Word Processing*.

## Word Processing

Creating and editing text documents in a word processor application.

## Word Processor Integration

A link created to allow you to use your word processor in connection with TeleMagic.

## Wrap

In certain fields, when the end of a line is reached, new information is automatically moved to the next line. The Notepad is an example of a field which wraps data.

## Write

See: *Windows Write*.

# Write Interface

A connection between TeleMagic Enterprise V4 and the Windows Write word processor.

## XMS

See: *Extended Memory*

## Zoom Dial

To set the Dialer to automatically dial the next contact in an index as soon as a call is terminated. This is especially useful for Telemarketers and anyone who routinely places a high volume of calls.

## Zoom In

In the Page Preview window accessed in the Report Generator and when printing reports, to view a specific part of the report up close.

## Underscore

An underscore is the horizontal line under a word that defines the word as being underlined. The underscore is the character itself alone, without a letter above it. It looks like this: _

## Standard Deviation

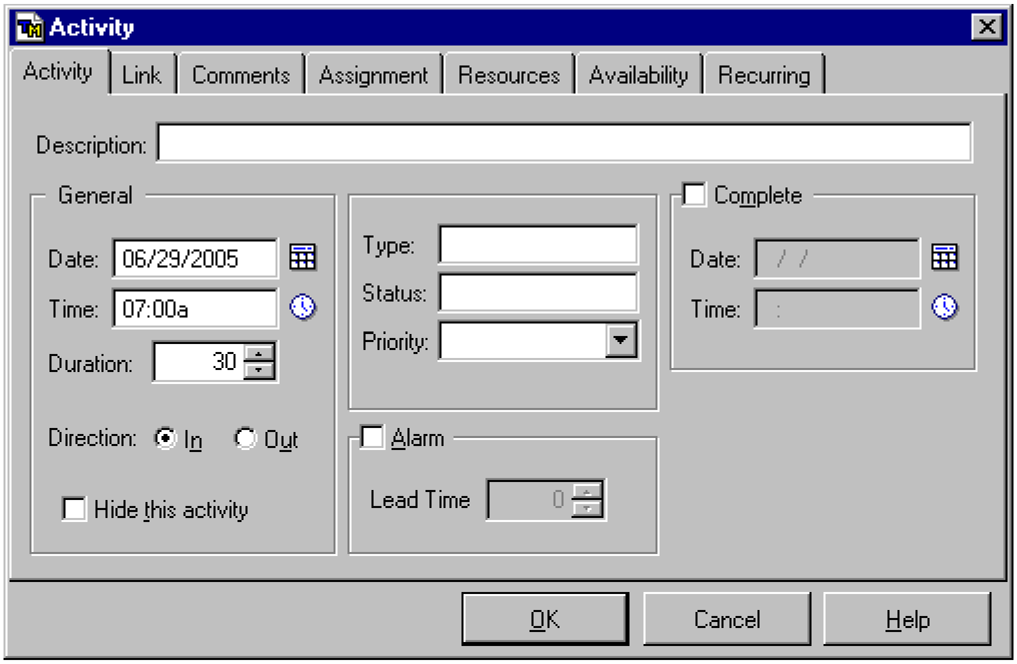
Standard deviation is defined as the square root of the arithmetic average of the squares of the deviations from the mean in a frequency distribution.

## Variance

Variance is the square of the standard deviation.

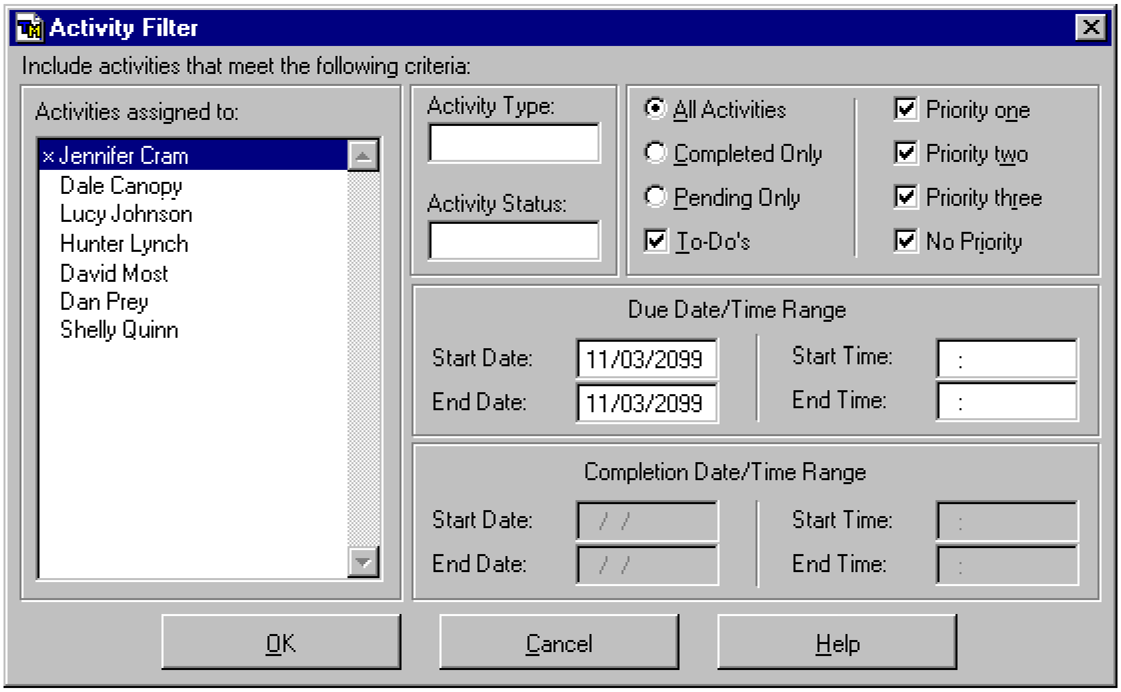
## Activity Archive Dialog Box

## Activity Dialog Box

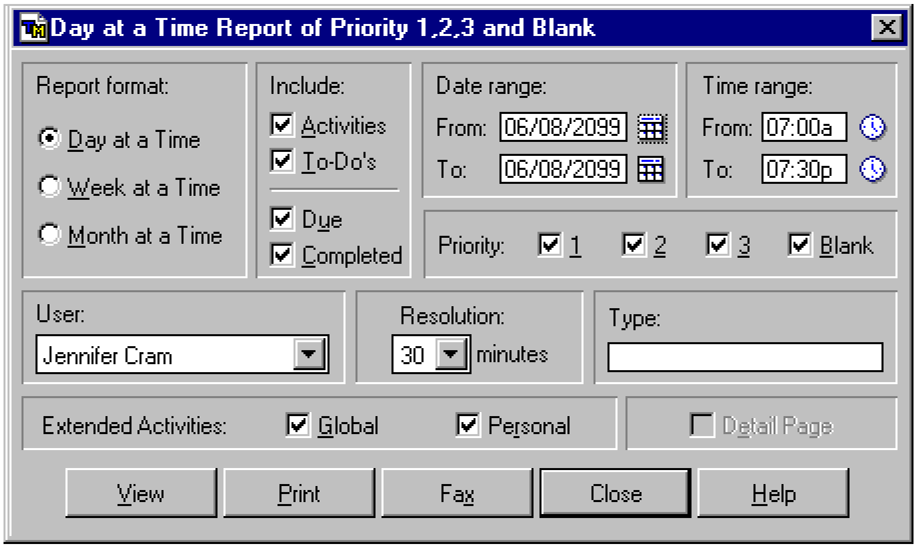


## Activity Field

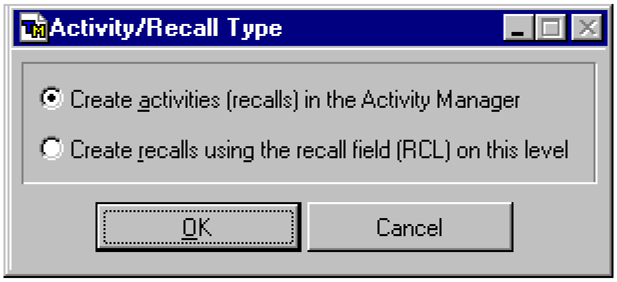
## Activity Filter Dialog Box



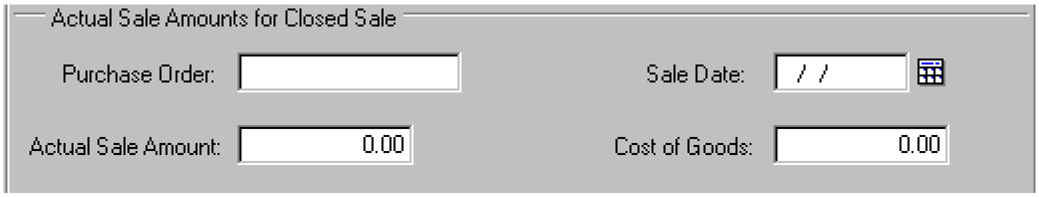
## Activity Report Dialog Box



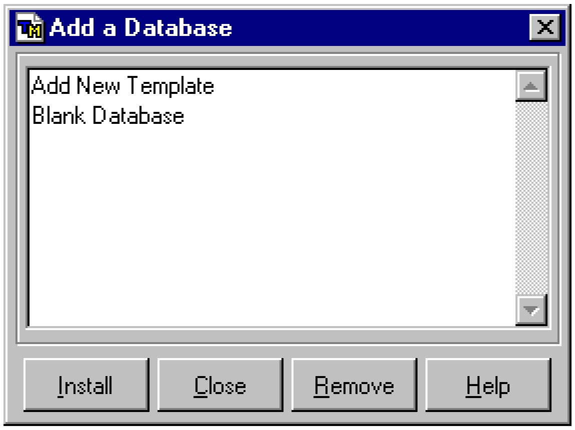
## Activity/Recall Type Dialog Box



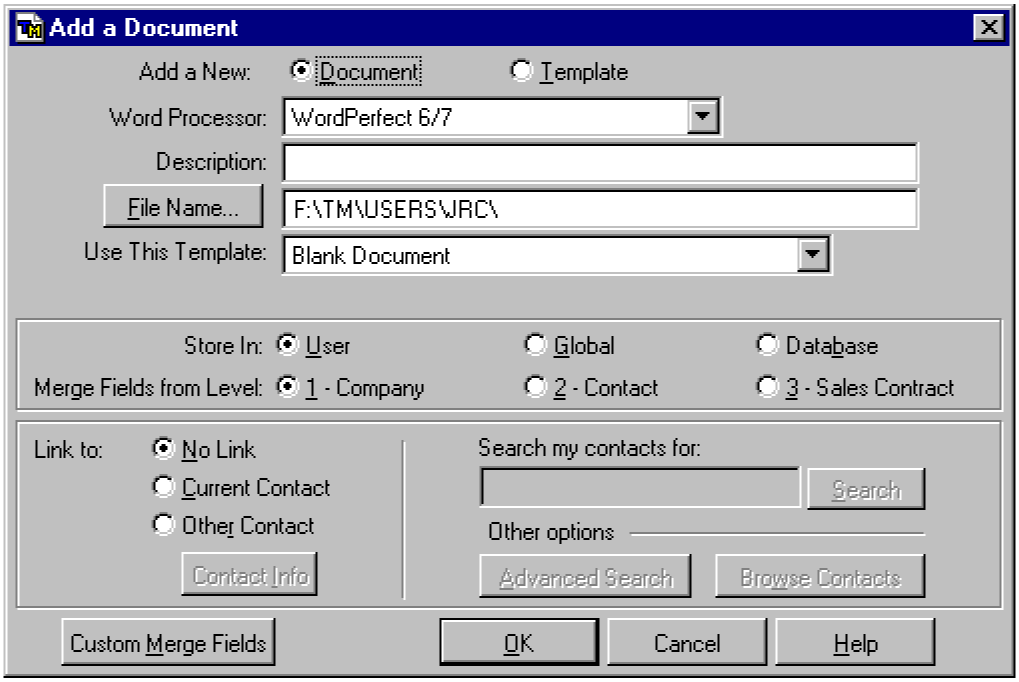
## Actual Sale Fields



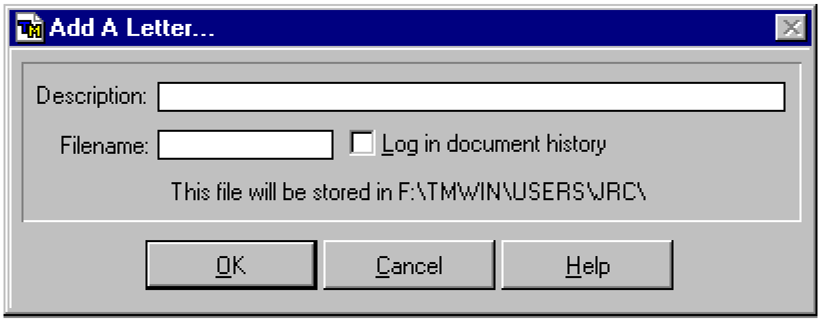
## Add a Database Screen



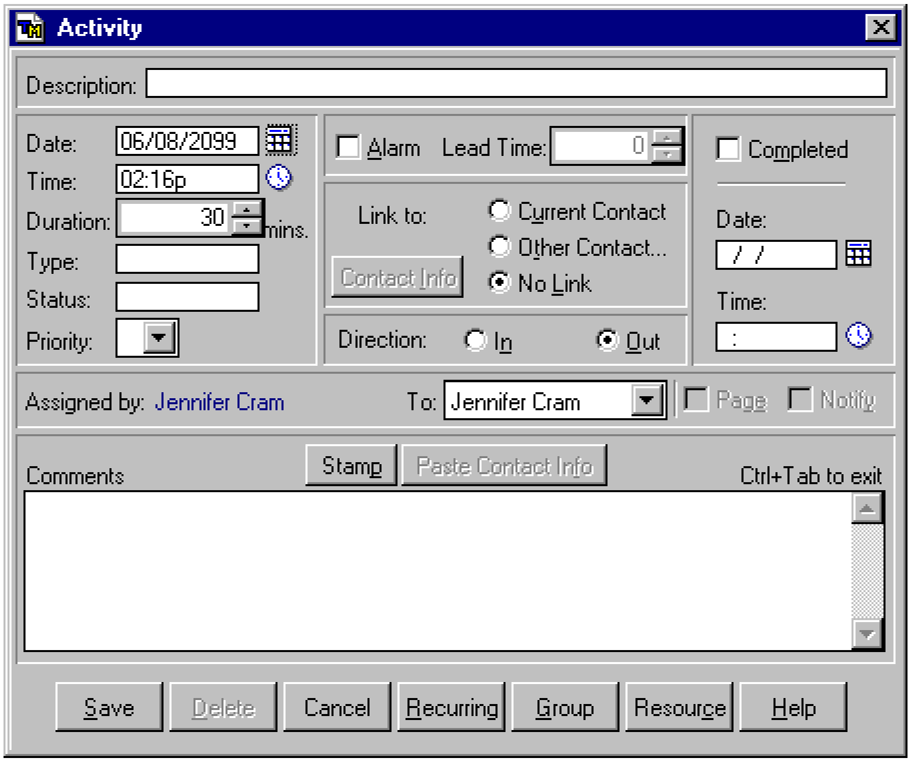
## Add a Document Dialog Box



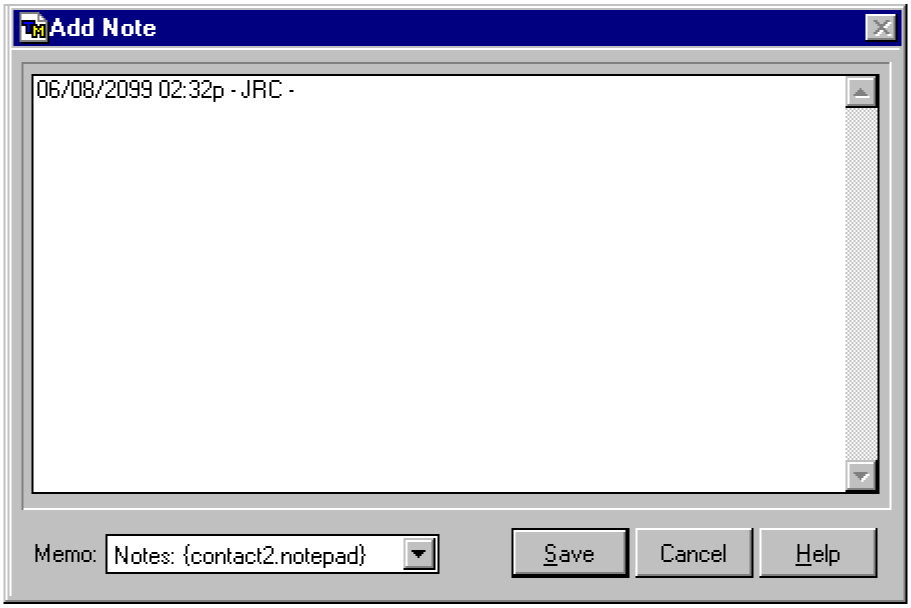
## Add a Letter Dialog Box



# Add Activity Dialog Box

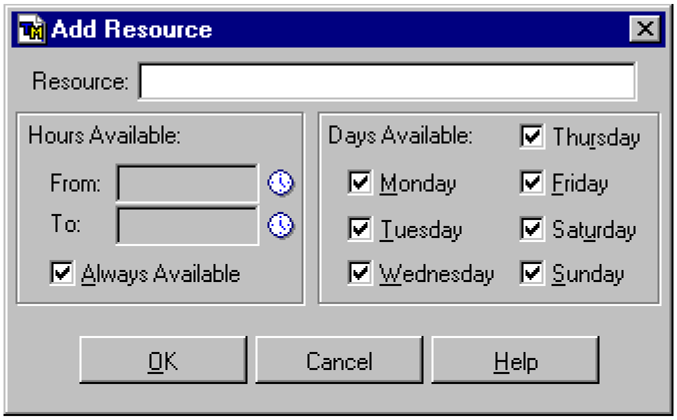


## Add Note Dialog Box

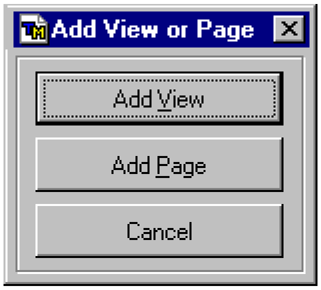


## Add Record Dialog Box (Documentation Database)

## Add Resource Dialog Box

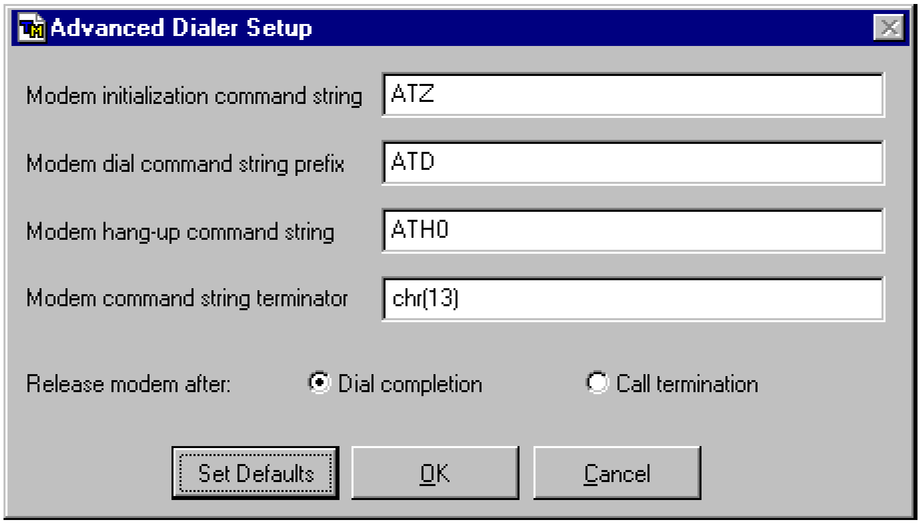


## Add View or Page Dialog Box



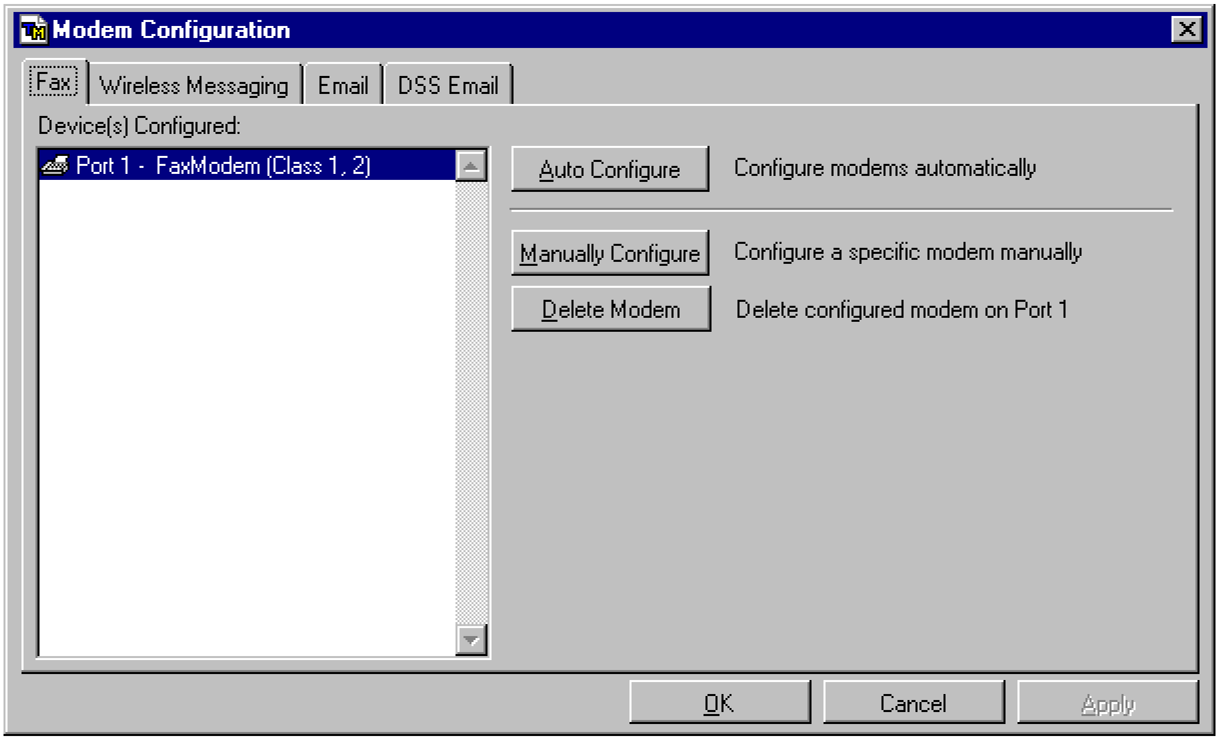
## Address/Phone List Dialog Box

# Advanced Dialer Setup Dialog Box



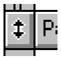
## Answer the Phone Toolbar Icon

## Automation Server Faxmodem Configuration Dialog Box

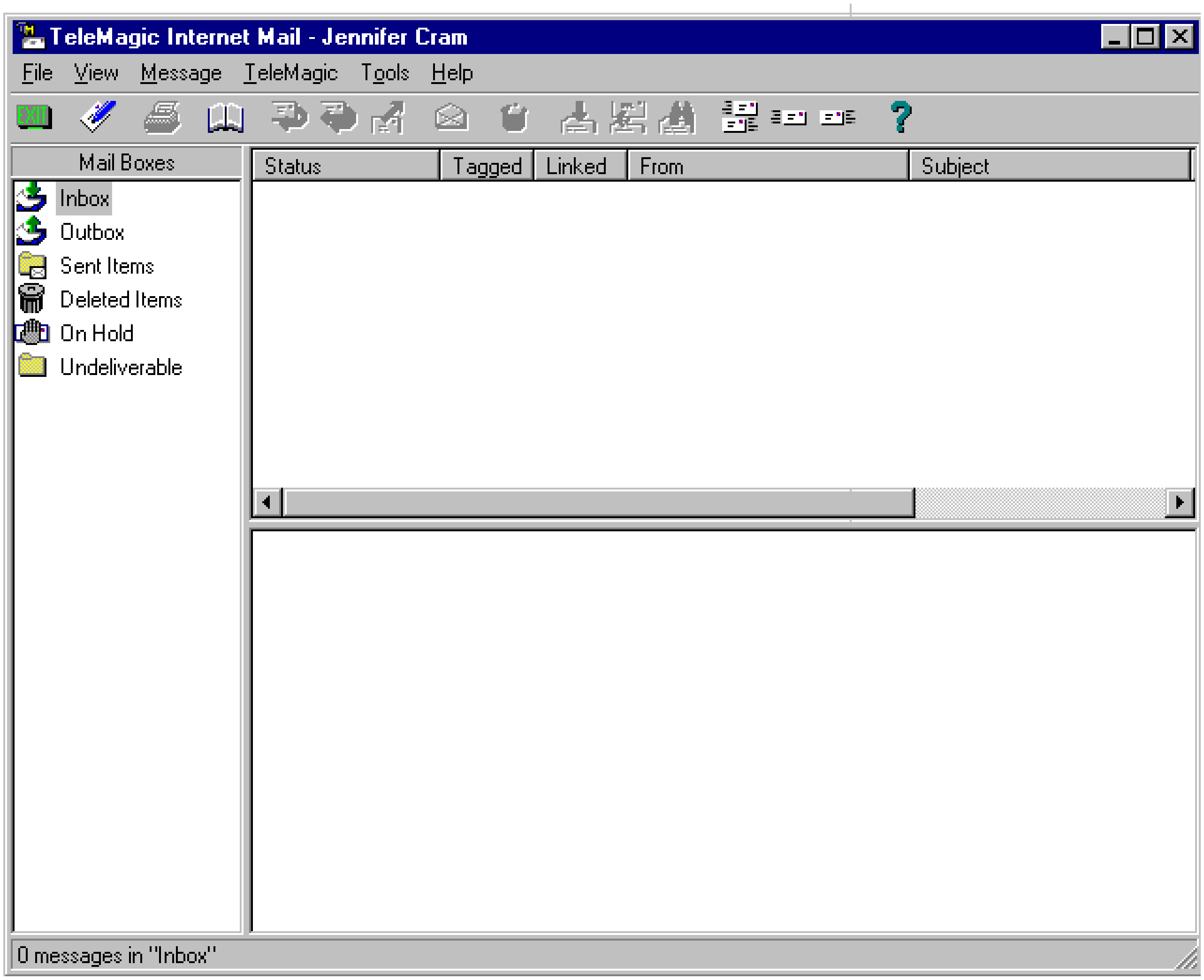


## Automation Server Icon

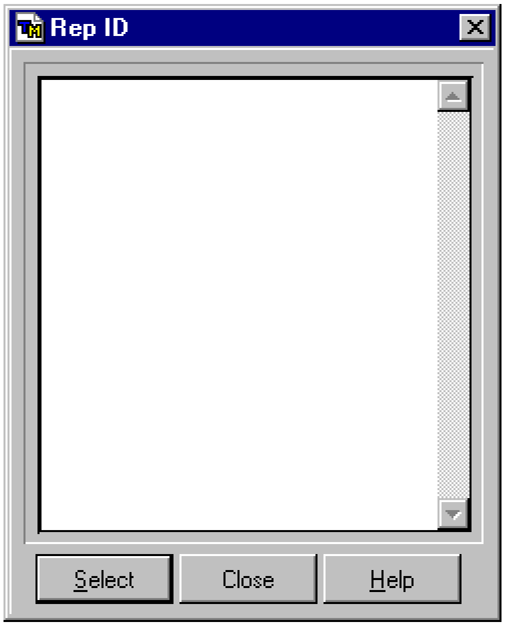
## Band Sizing Arrows



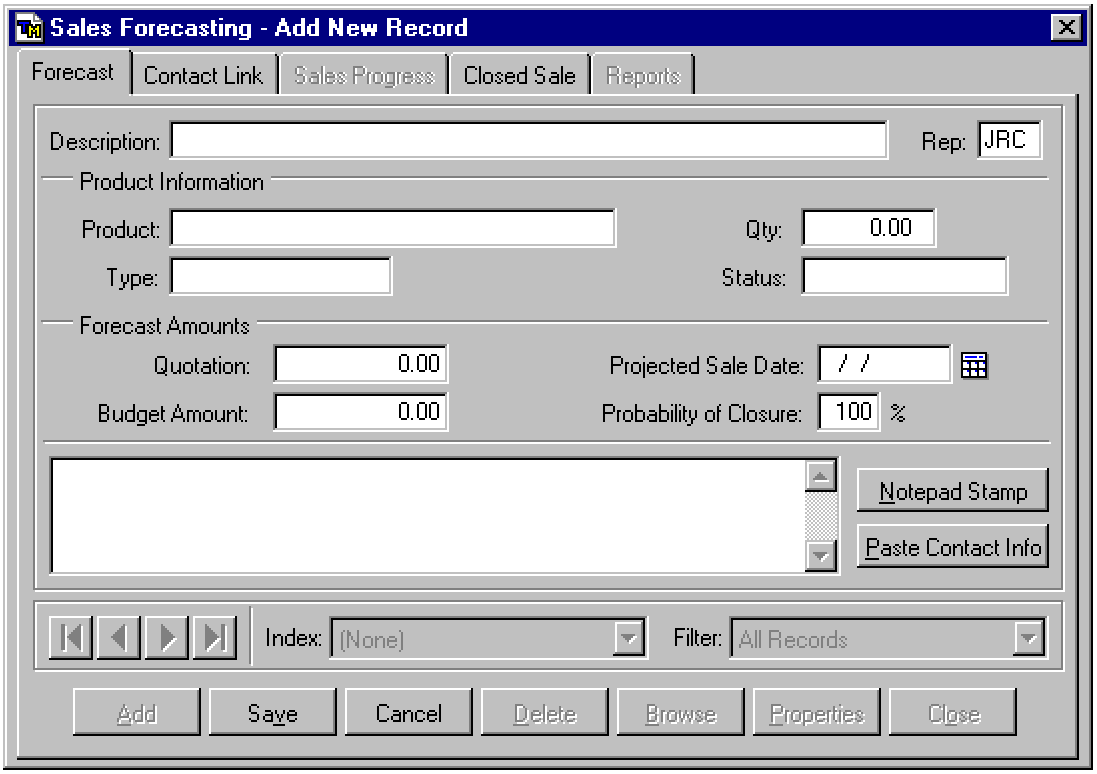
## Blank E-Mail Dialog Box



## Blank List Box

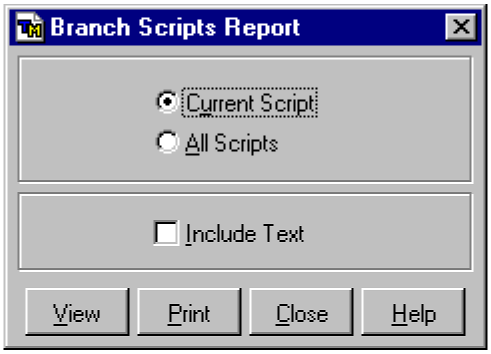


## Blank Sales Forecasting Dialog Box

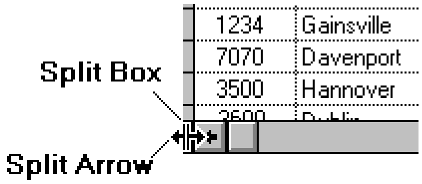


## Branch Scripting Toolbar Icon

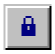
## Branch Scripts Report Dialog Box



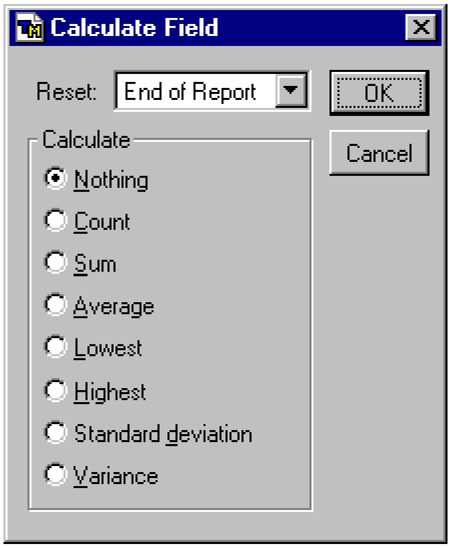
## Browse Split Arrow



## Button Lock

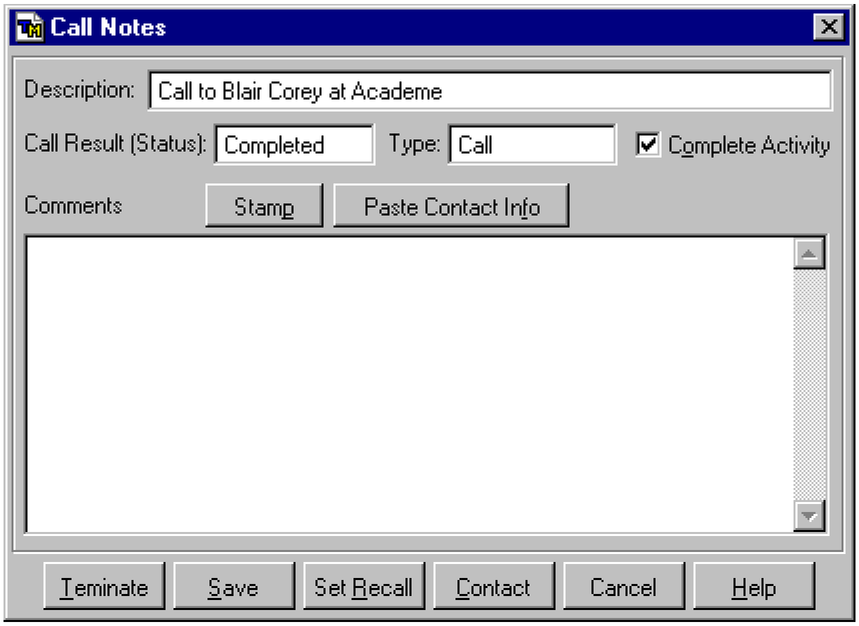


## Calculate Field Dialog Box

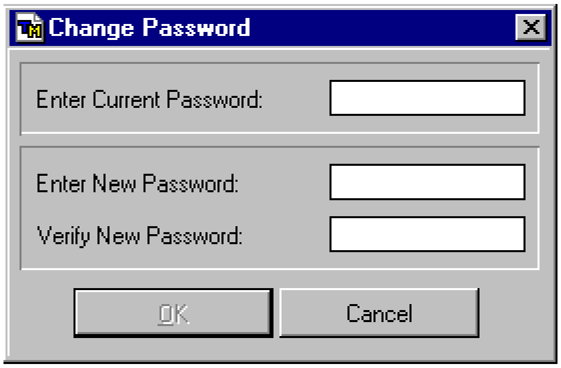


## Calculator

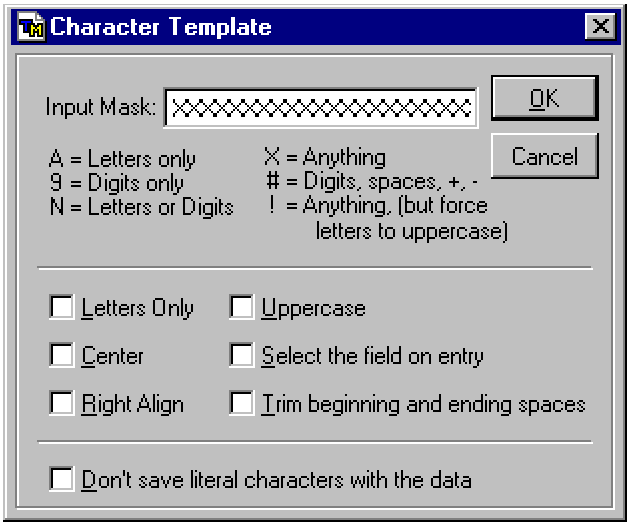
## Call Notes Dialog Box



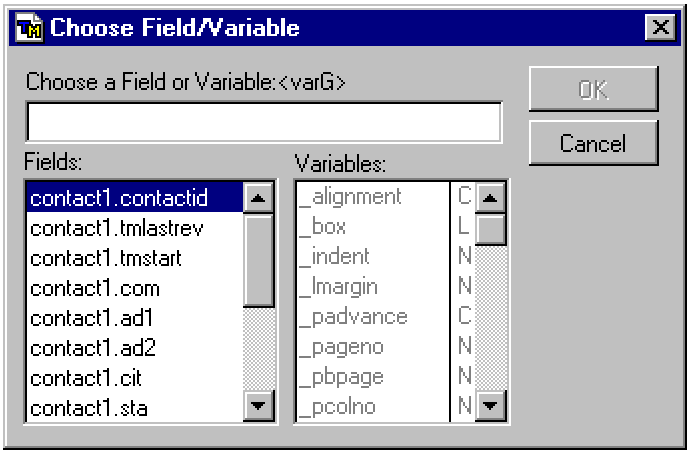
## Change Password Dialog Box



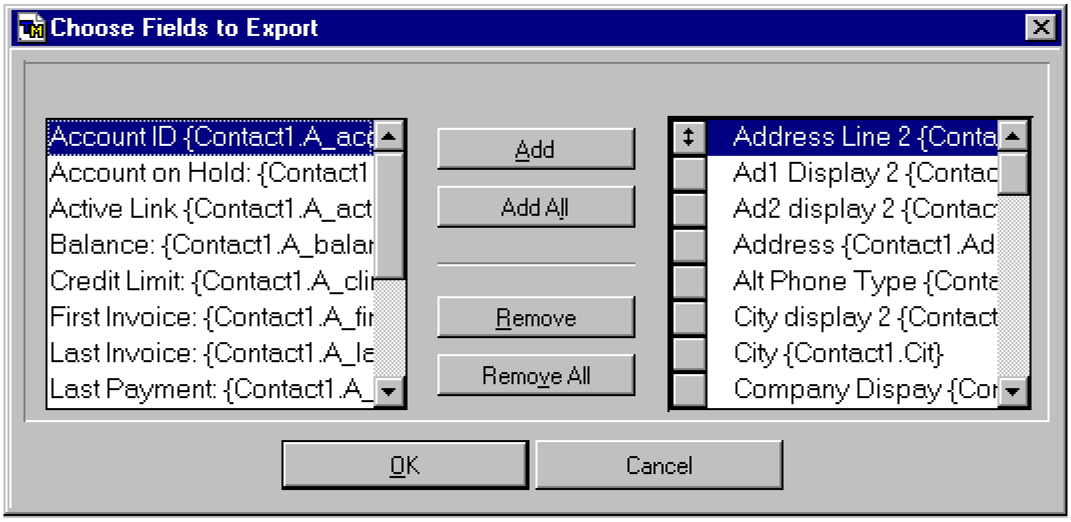
## Character Template Dialog Box



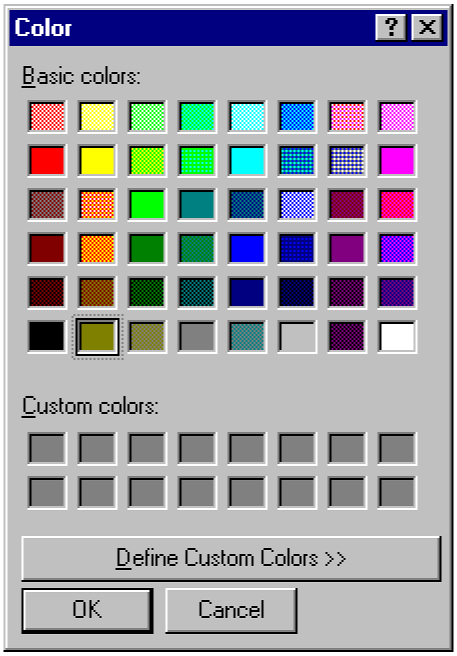
## Choose Field/Variable Dialog Box



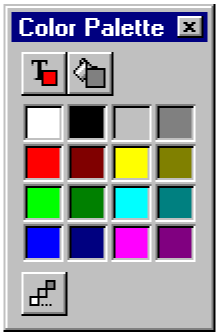
## Choose Fields to Export Dialog Box



## Color

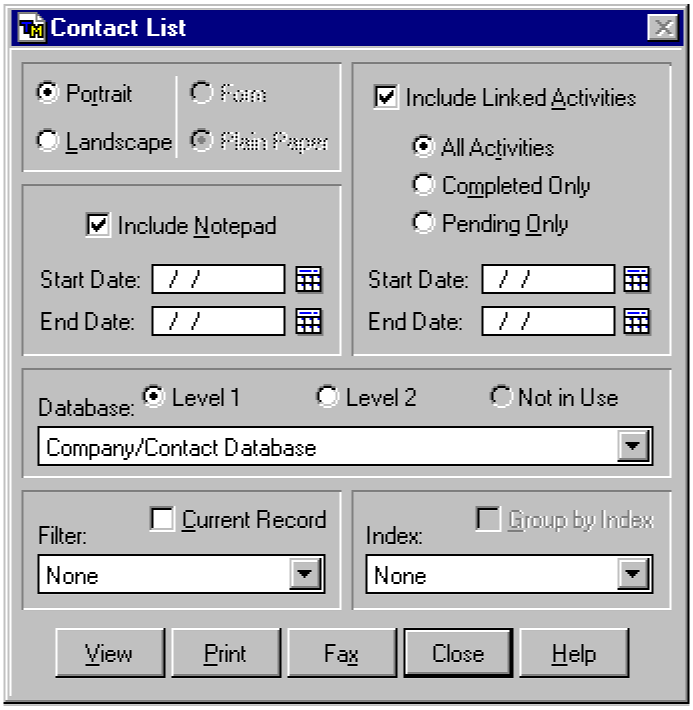

Color
Basic colors:
Custom colors:
Define Custom Colors >>
OK
Cancel

## Color Palette

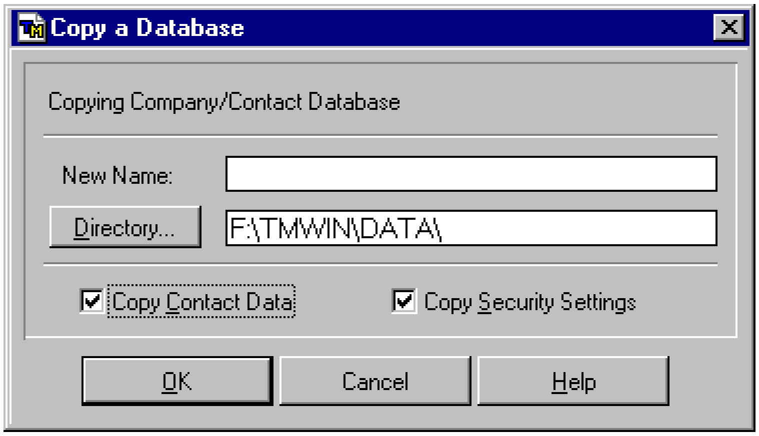


This is a dockable toolbar. Its actual appearance will vary.

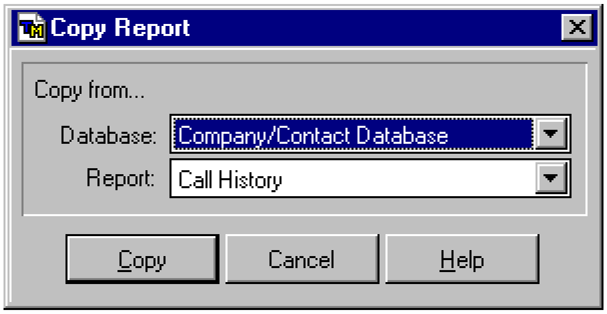
## Contact List Report Dialog Box



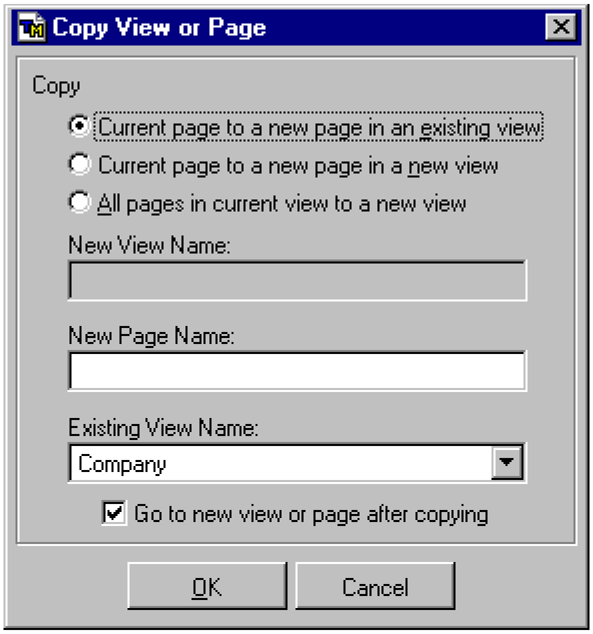
## Copy a Database Dialog Box



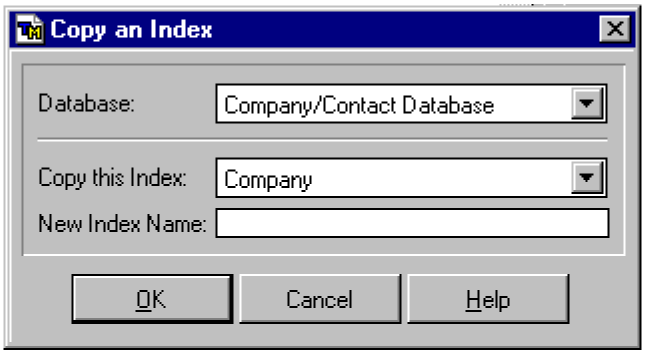
## Copy a Report Dialog Box



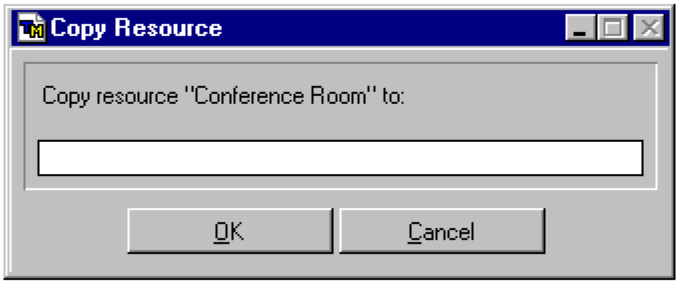
## Copy a View or Page Dialog Box



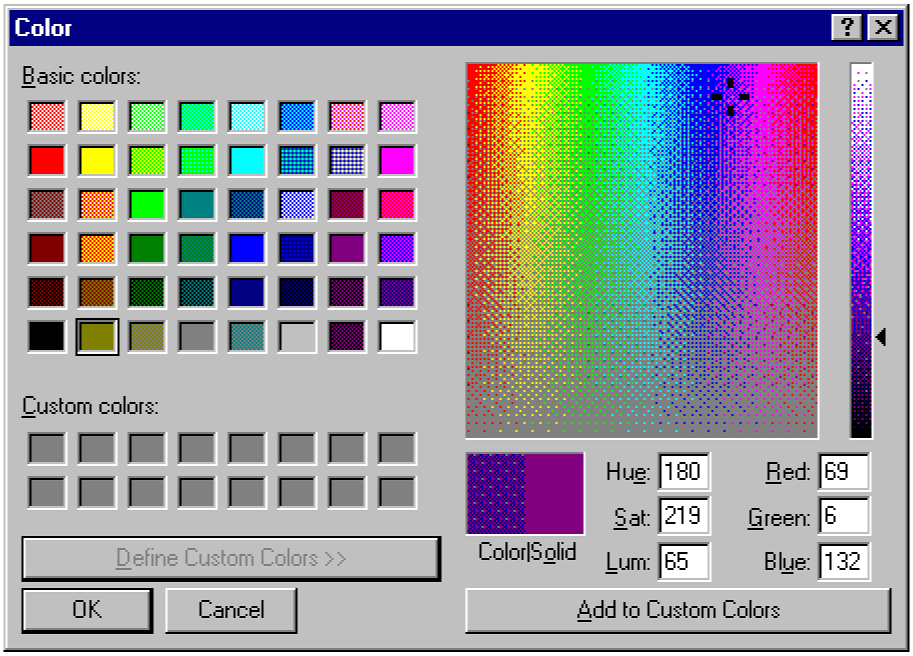
## Copy an Index Dialog Box



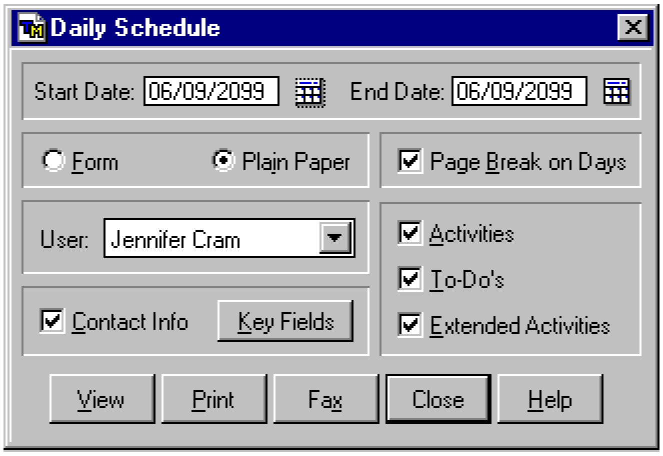
## Copy Resource Dialog Box



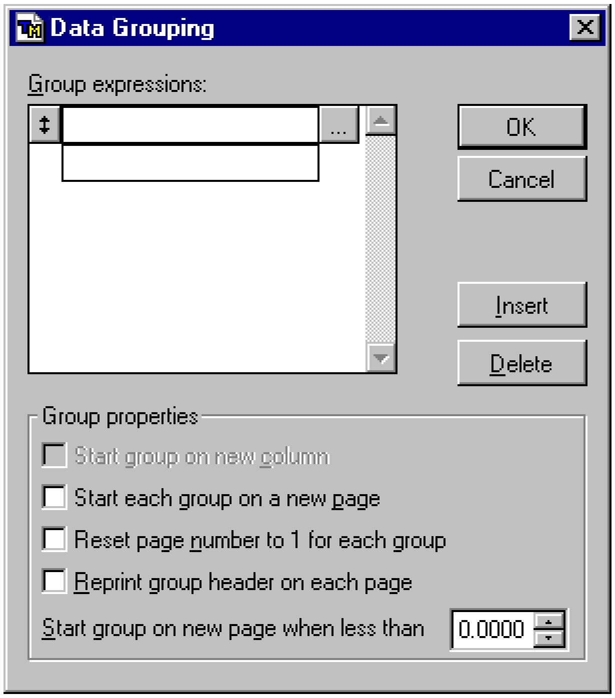
## Custom Colors



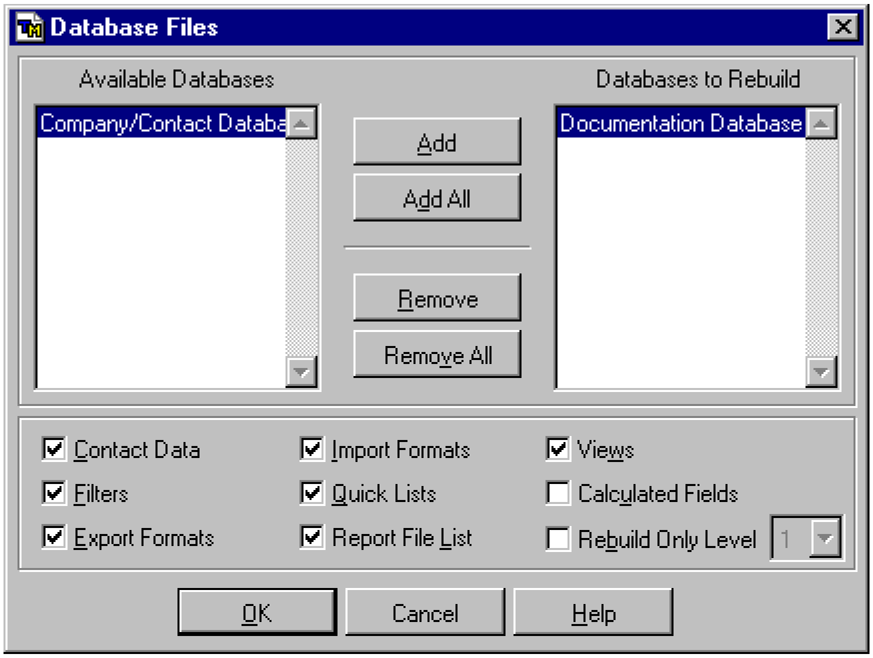
## Daily Schedule Dialog Box



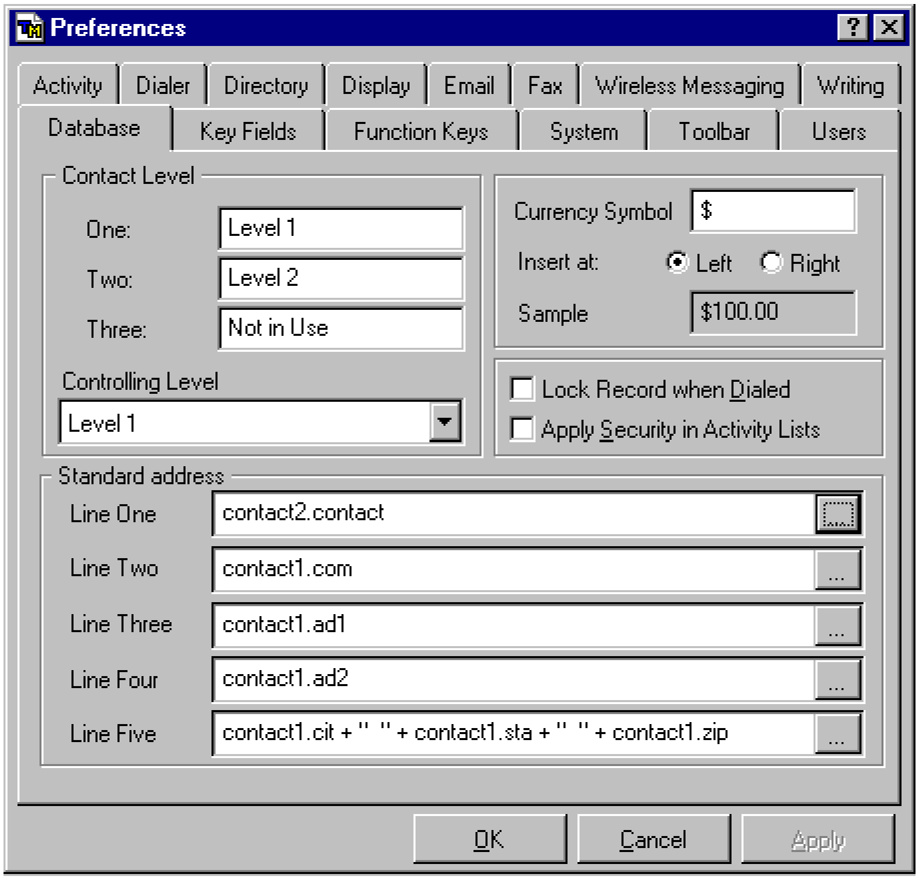
## Data Grouping Dialog Box



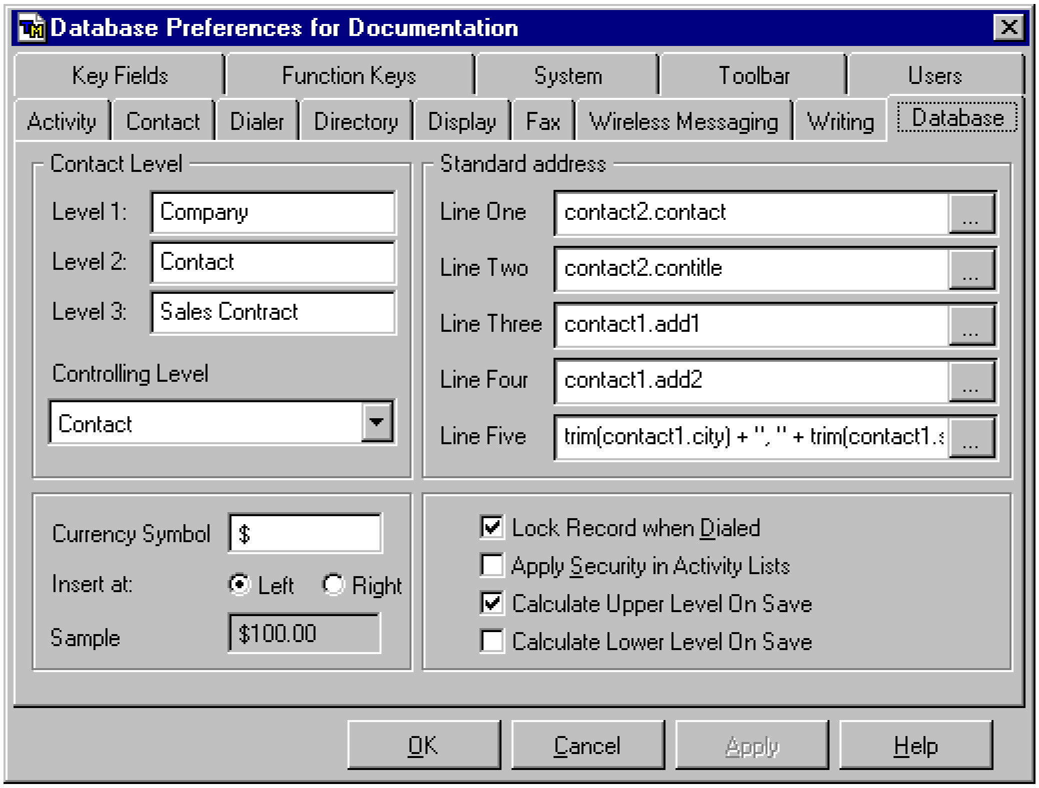
## Database Files Dialog Box



## Database Preferences Screen



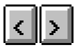
## Database Preferences Dialog Box



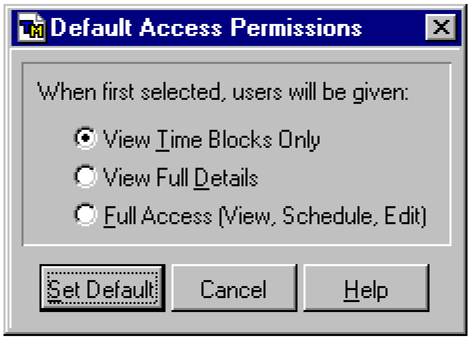
## Date Picker Icon

-

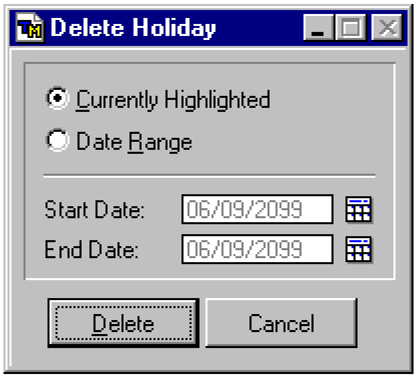
## Date Scroll Arrows



## Default Access Permissions Dialog Box

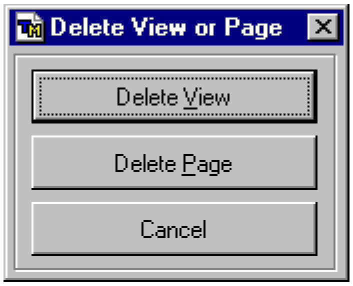


## Delete Holiday Dialog Box

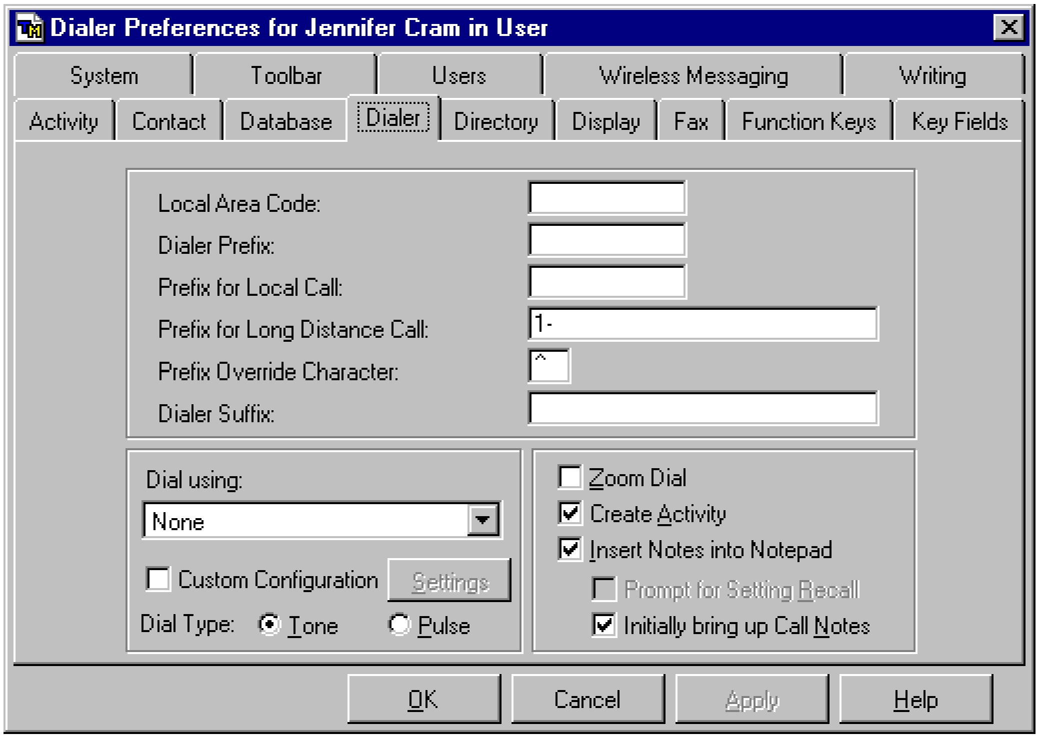


## Delete Recurring Activities Dialog Box

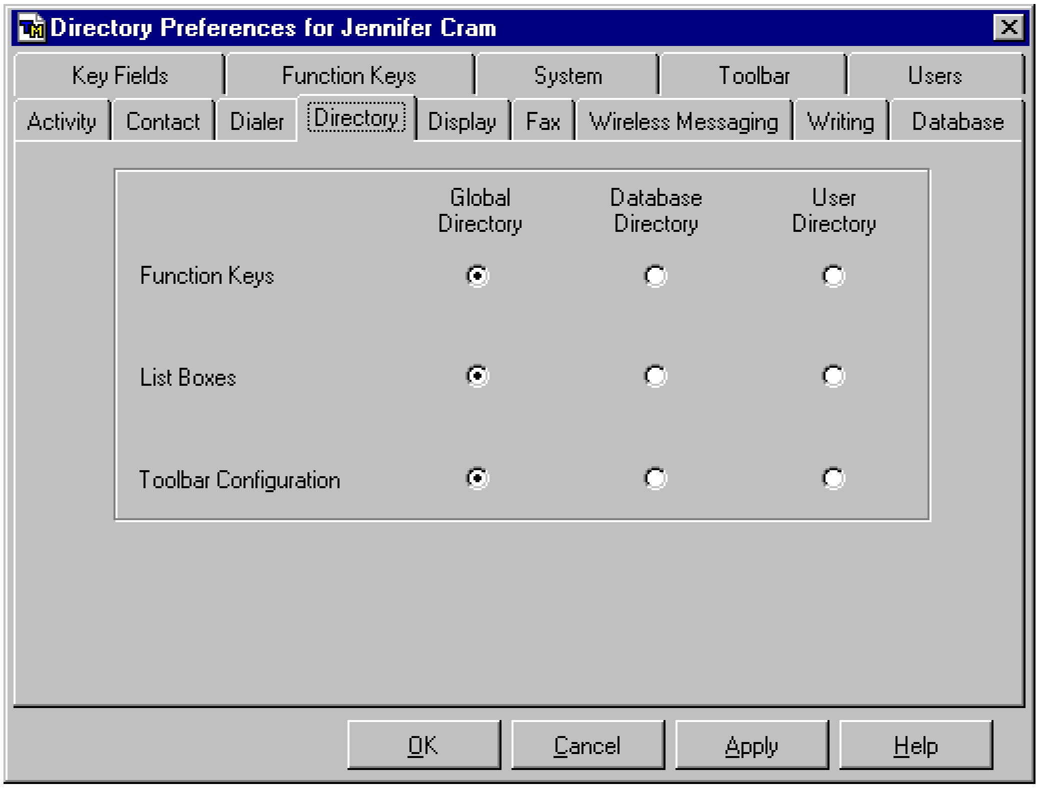
## Delete View or Page Dialog Box



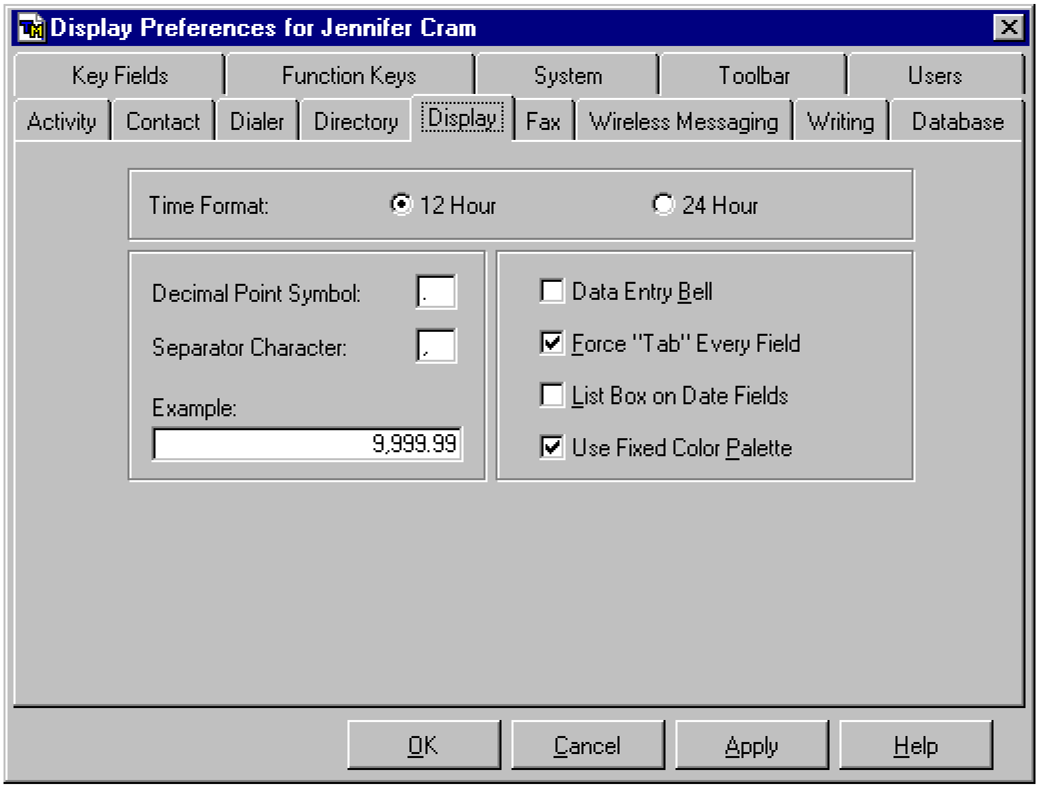
## Dialer Preferences Screen



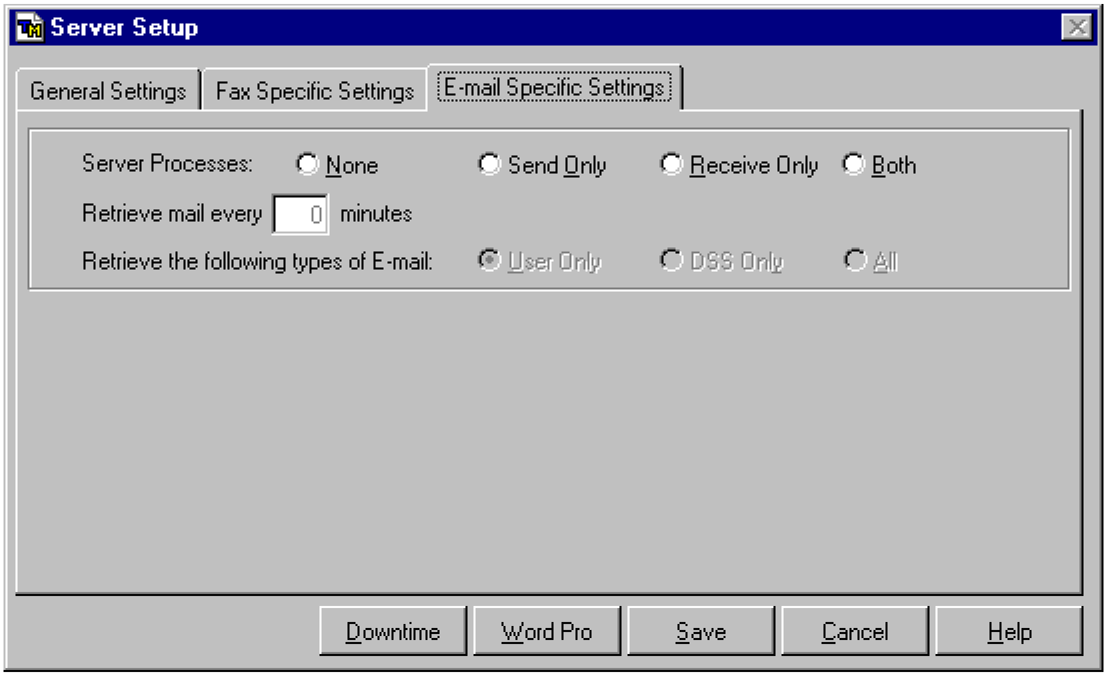
## Directory Preferences Screen



## Display Preferences Screen

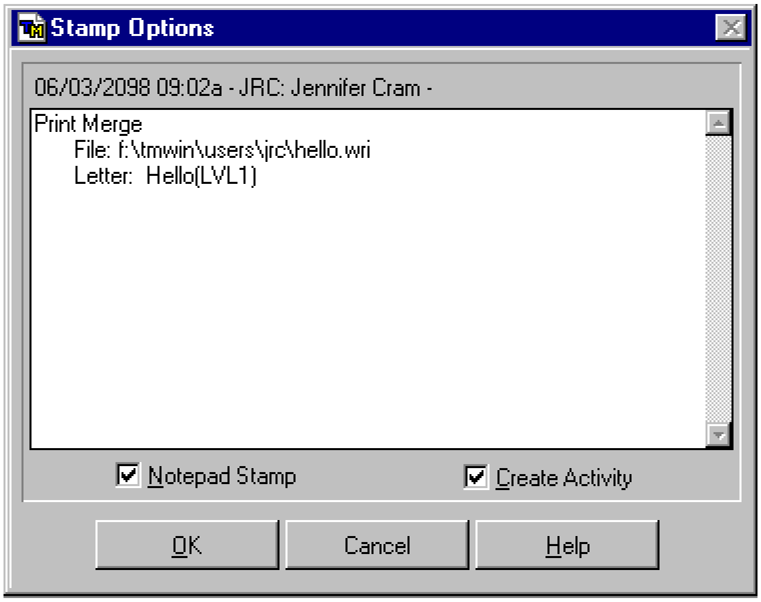


## E-mail Specific Settings Page

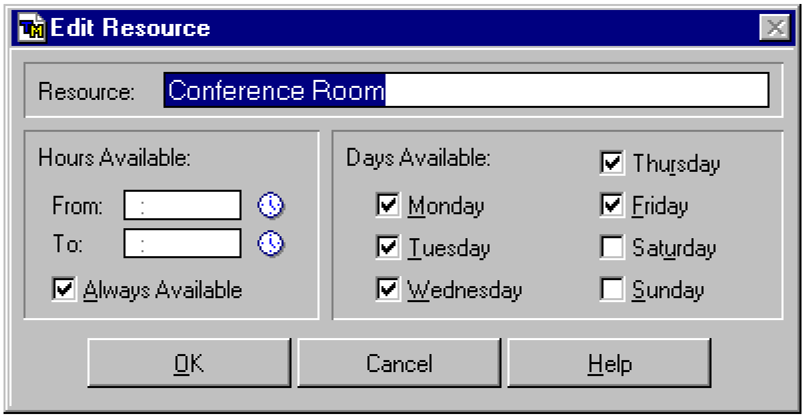


## E-mail Toolbar Icon

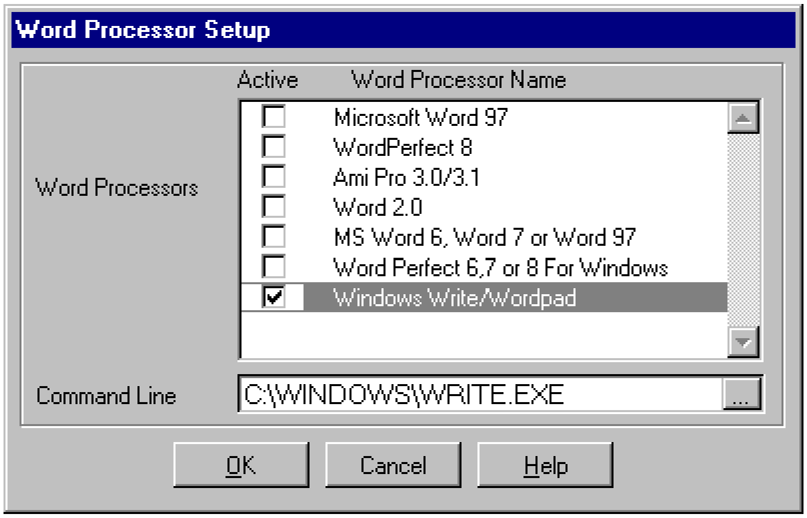
## Edit Notepad Stamp Text Dialog Box



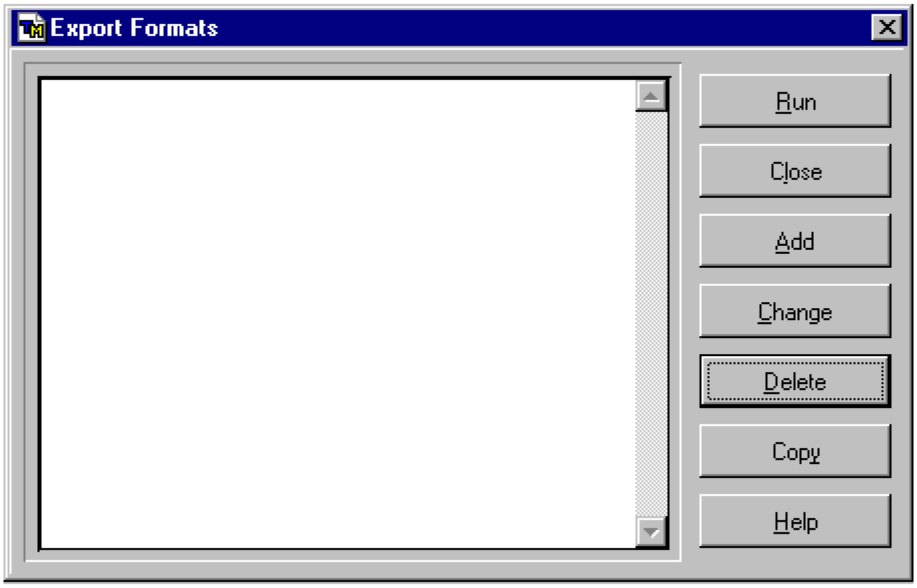
## Edit Resource Dialog Box



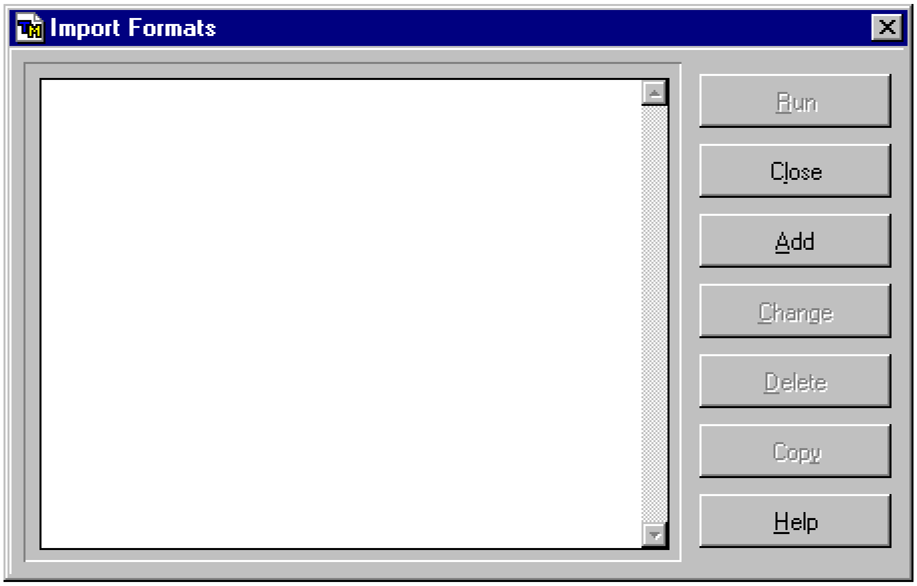
## Word Processor Setup Dialog Box



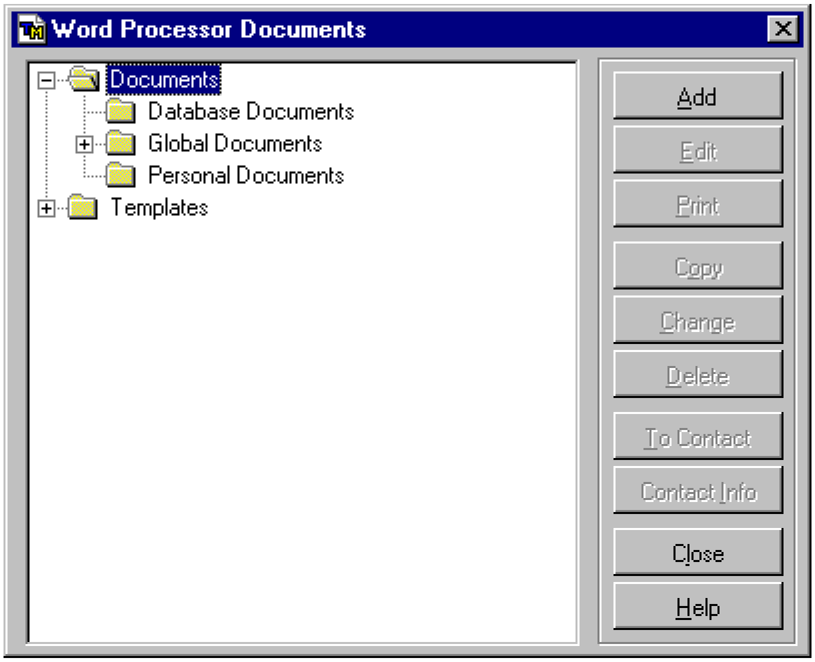
## Empty Export Formats Selection Box



## Empty Import Formats Selection Box

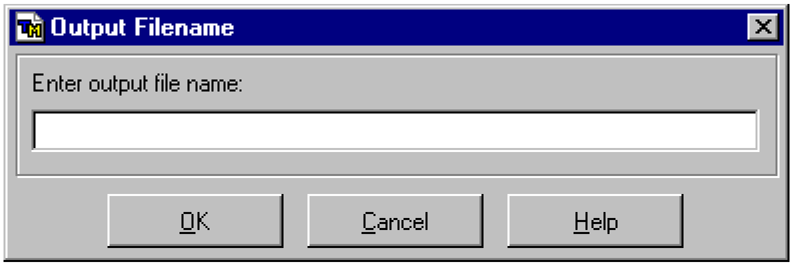


## Empty Word Processor Document Selection Box

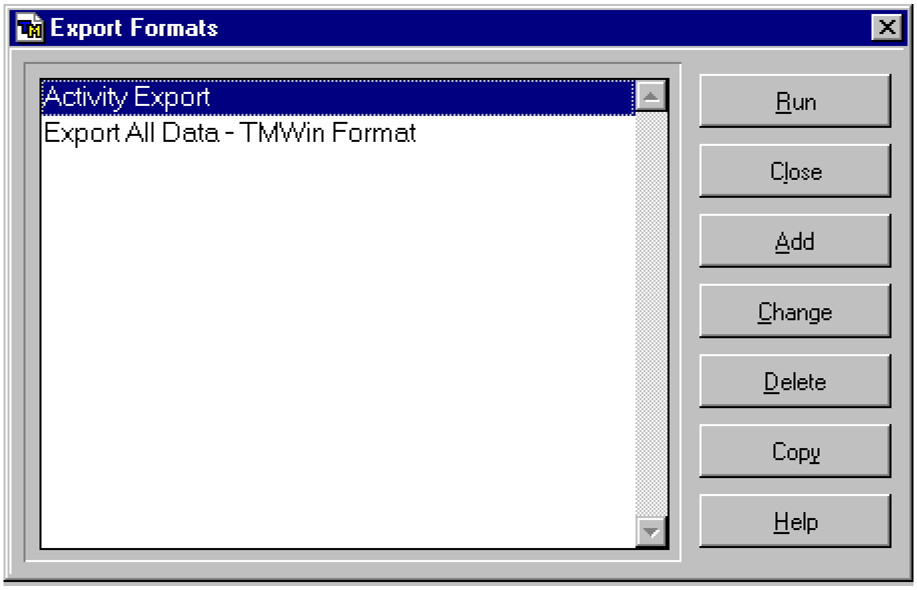


## Exit Toolbar Icon

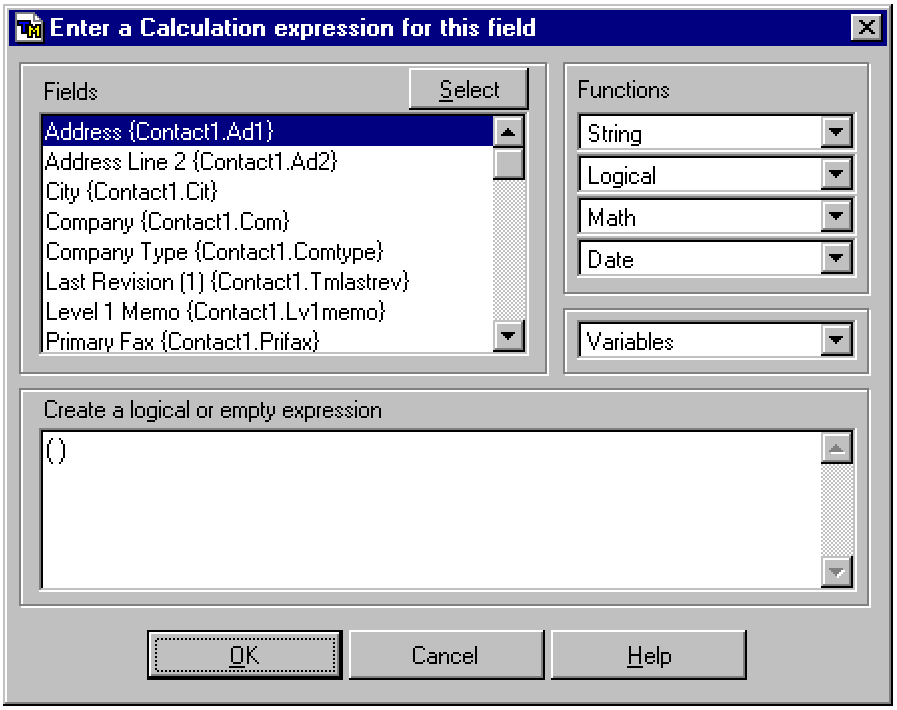
## Export Format's Output Filename Box



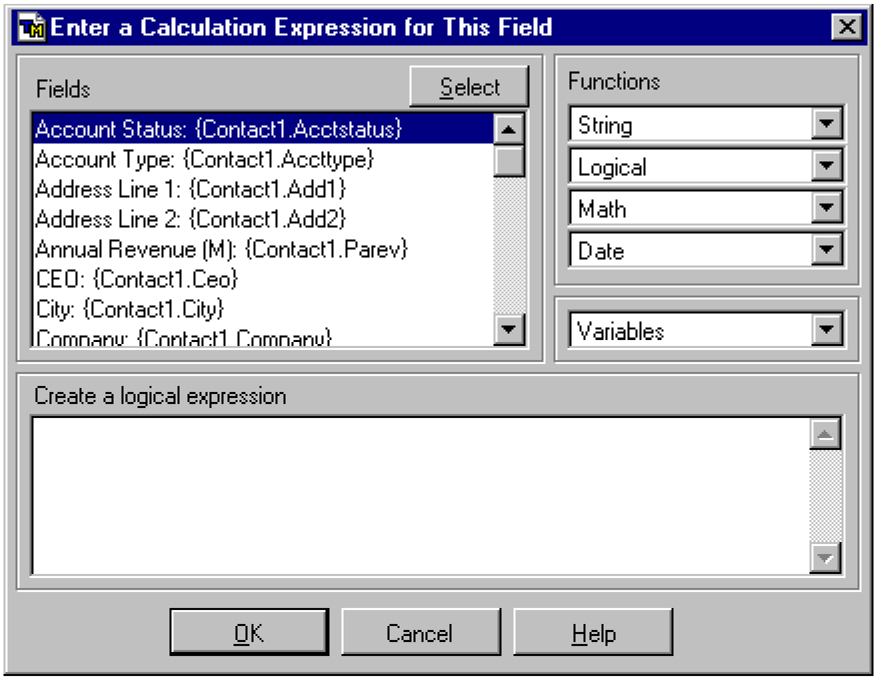
## Export Formats Selection Box



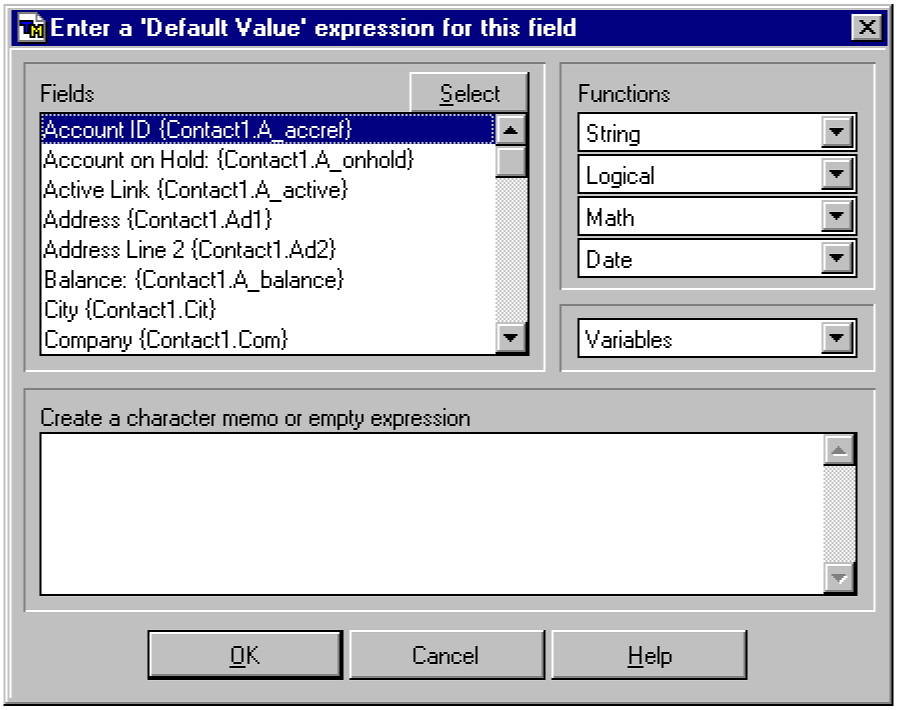
## Expression Builder Dialog Box For Assigned to Current User Filter



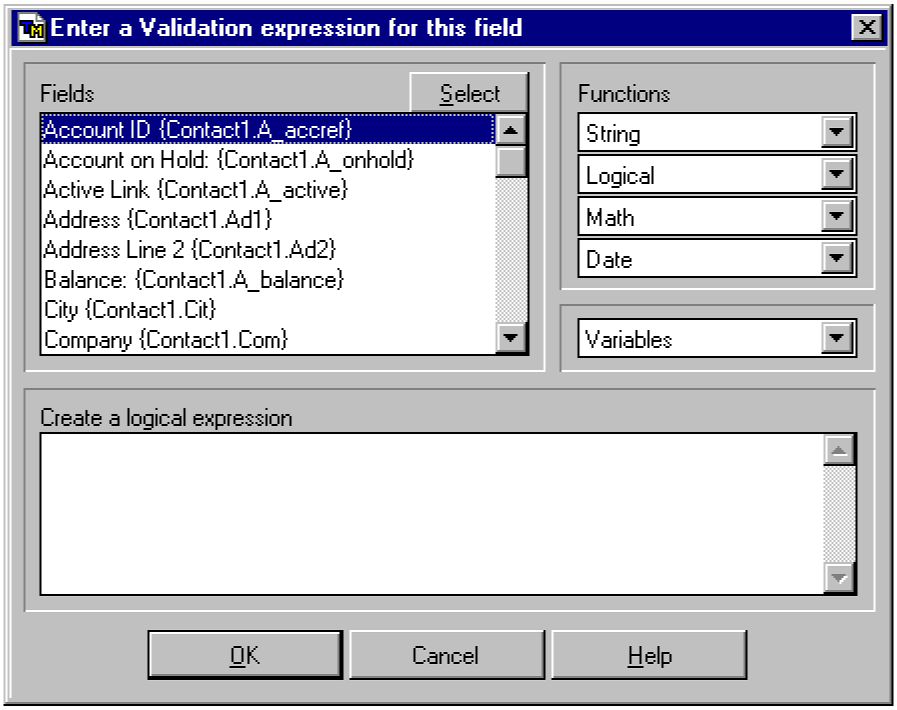
## Expression Builder for Calculated Field



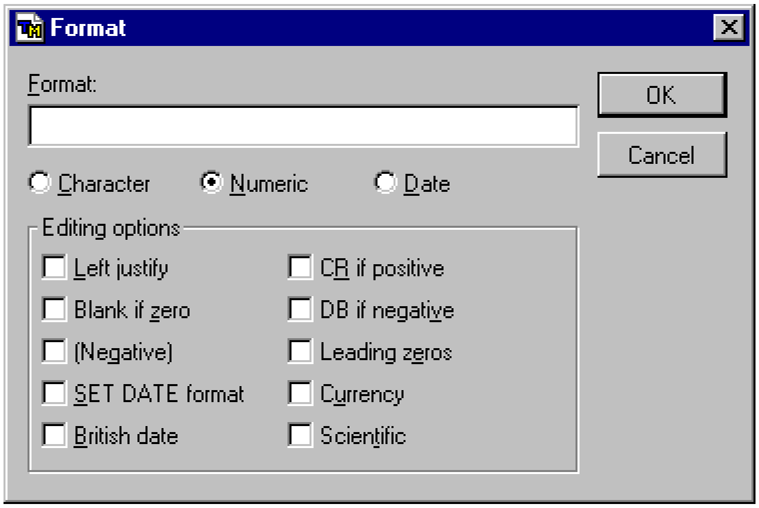
## Expression Builder for Default Value Field



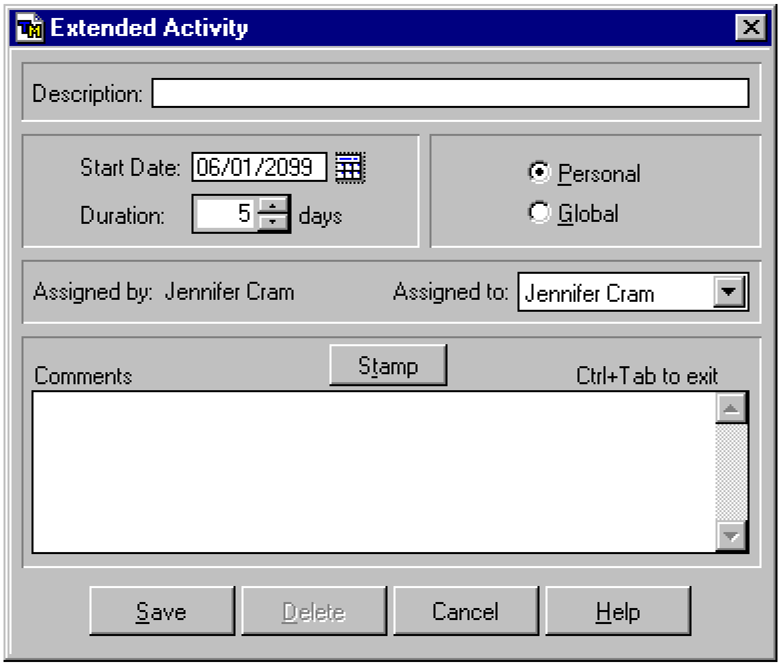
## Expression Builder for Validated Field



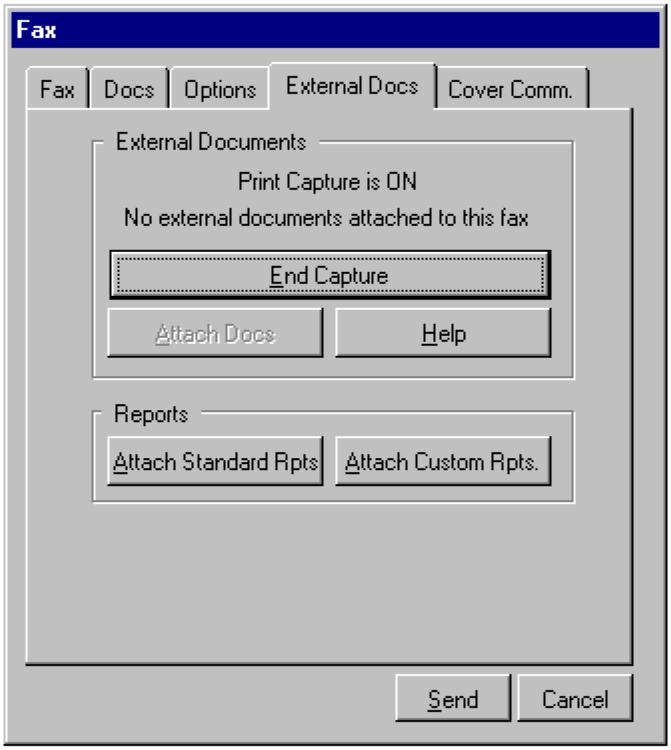
## Expression Format Dialog Box



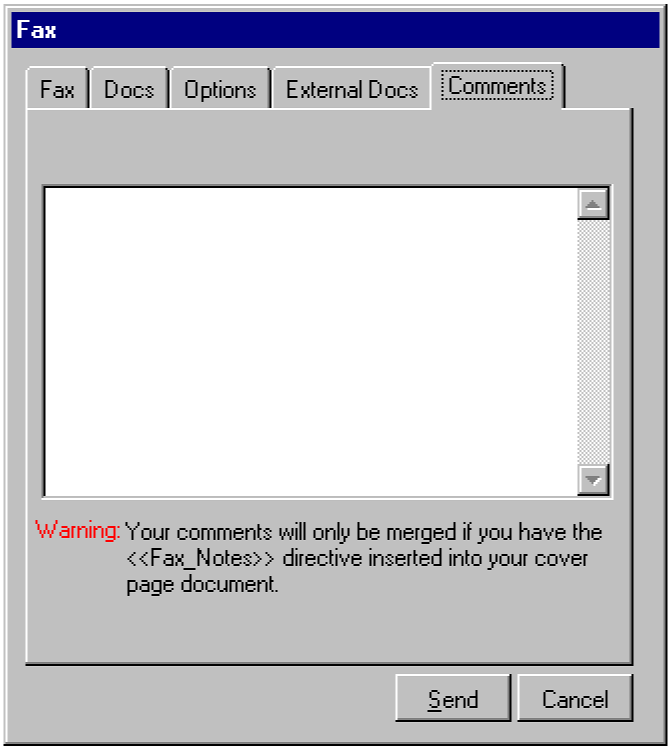
## Extended Activity Dialog Box



## External Document Dialog Box with Print Capture On

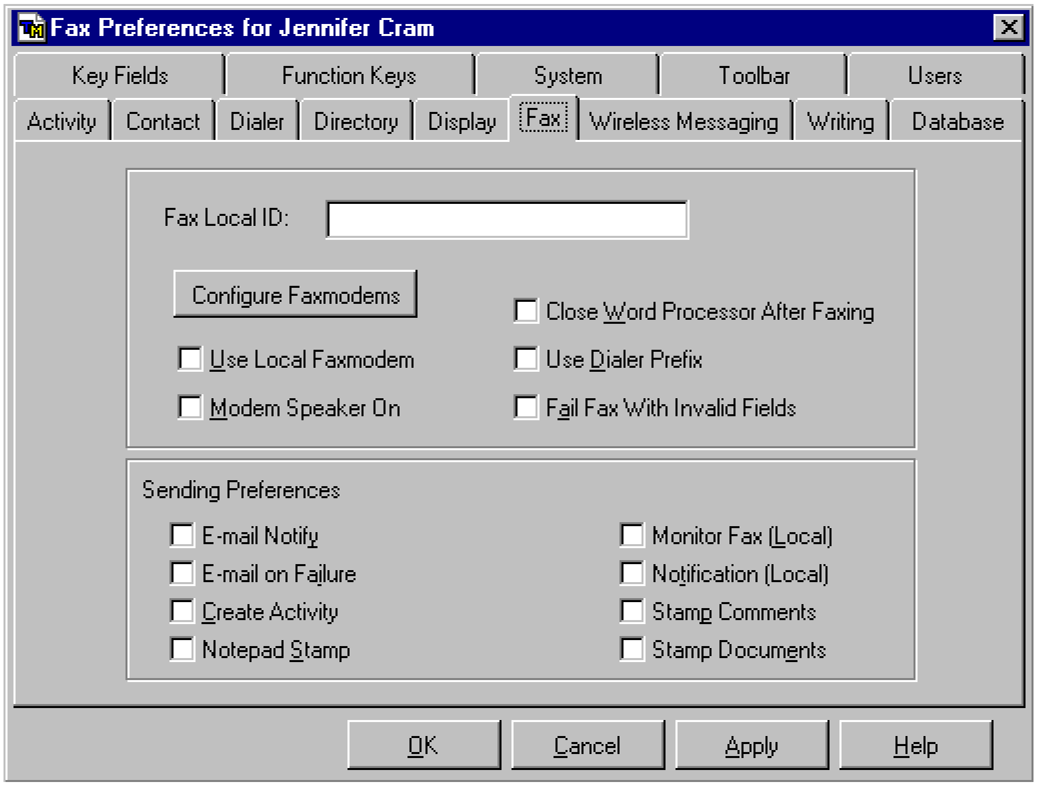


## Fax Comments/Notes Dialog Box

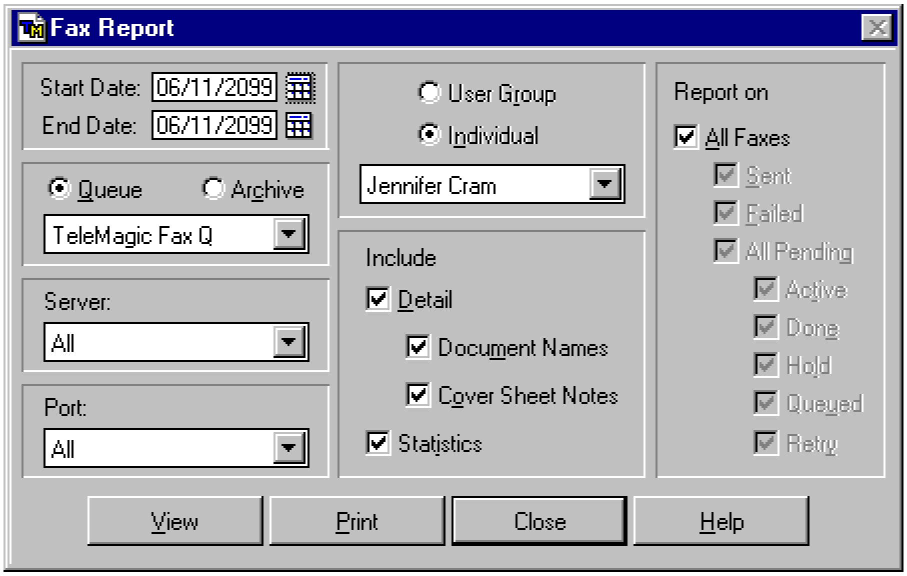


## Fax Options Dialog Box

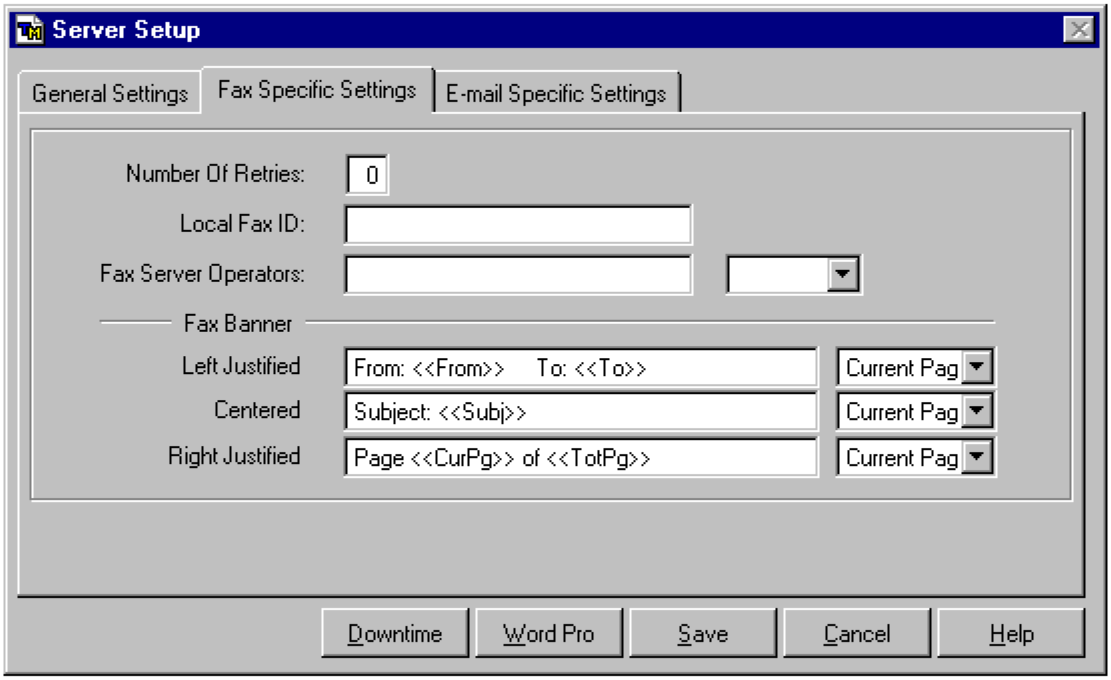
## Fax Preferences



## Fax Report Dialog Box

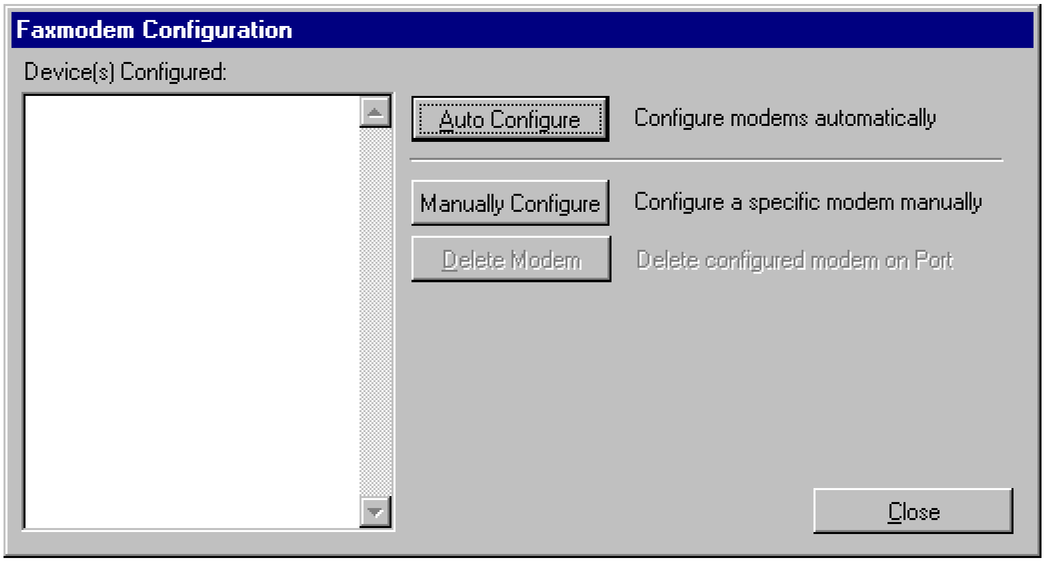


## Fax Specific Settings Page

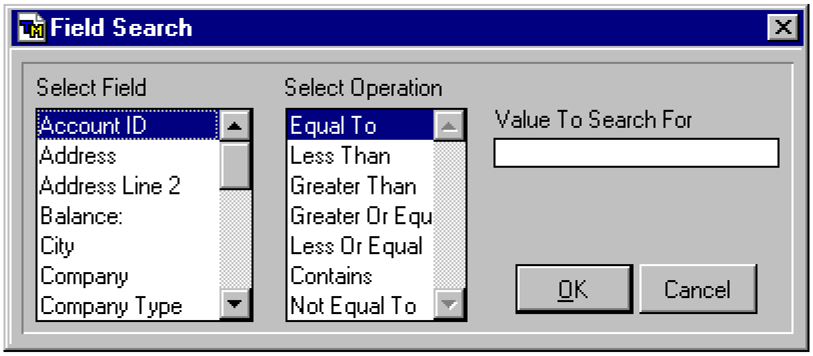


## Fax Toolbar Icon

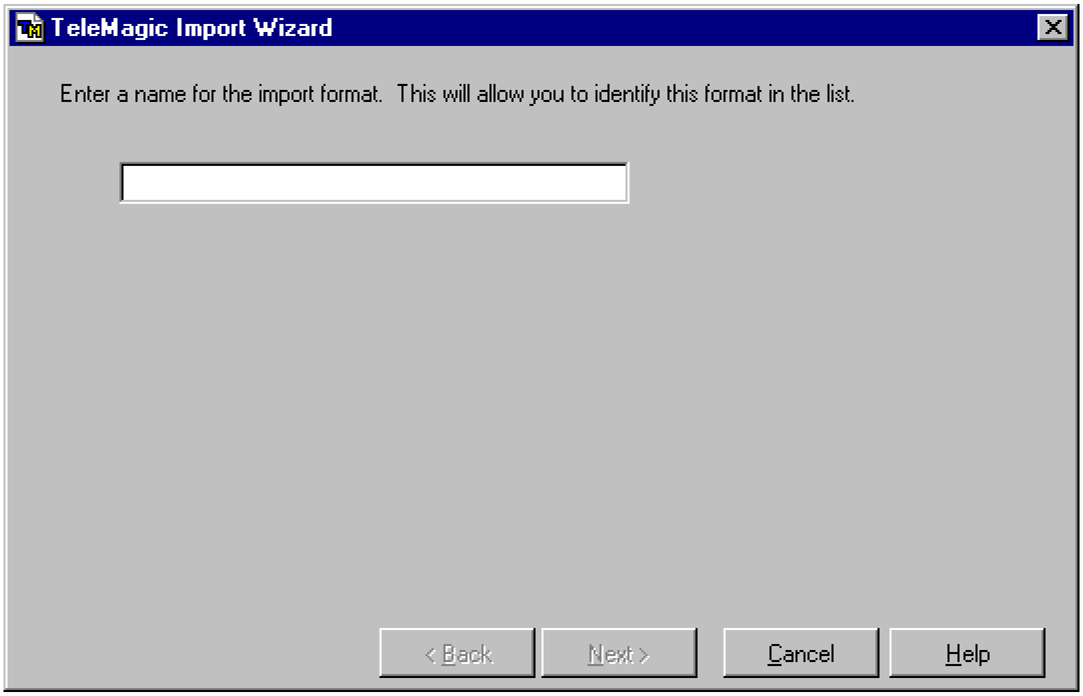
## Faxmodem Configuration Dialog Box



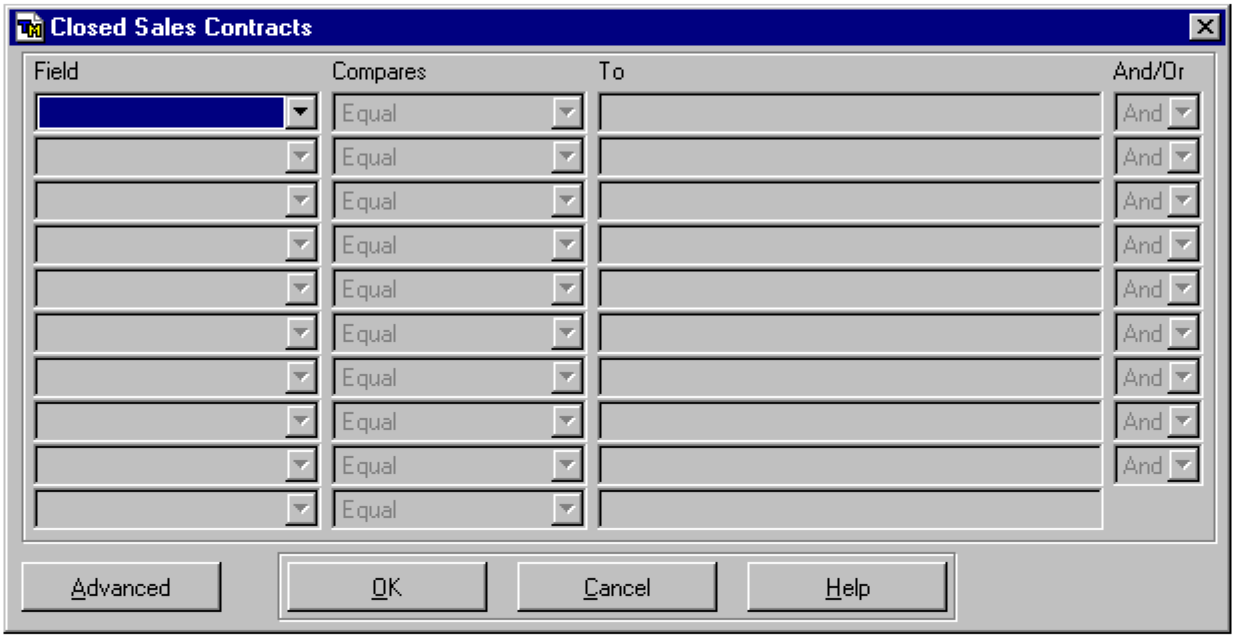
## Field Search Dialog Box



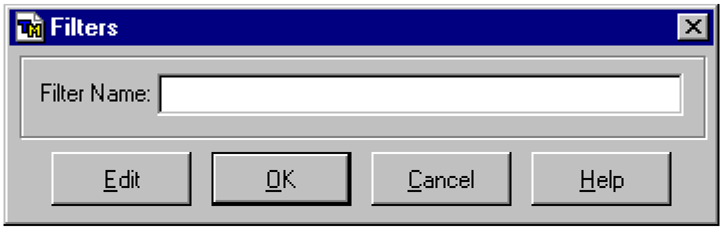
## The TeleMagic Import Wizard



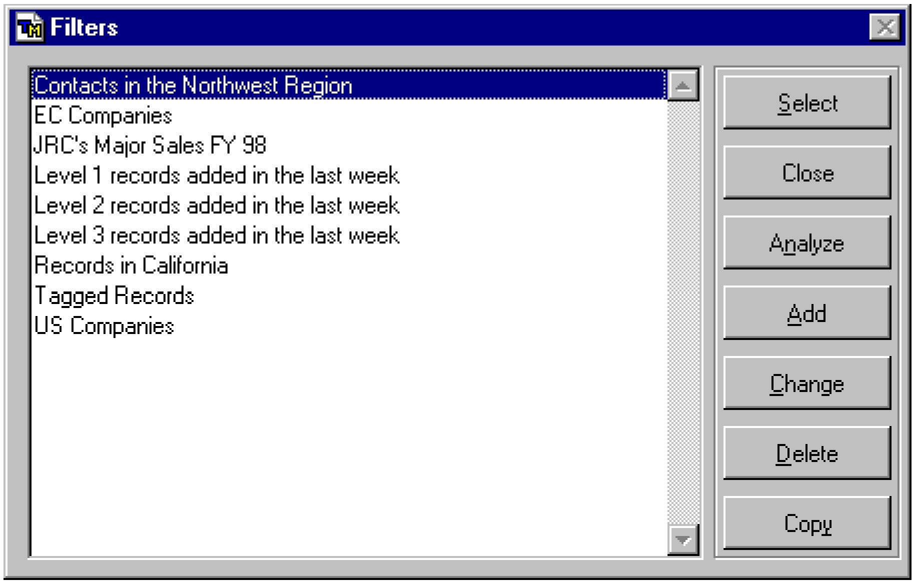
## Filter Expression Dialog Box



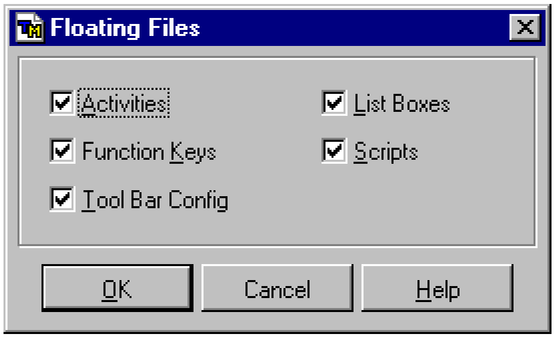
## Filters Dialog Box



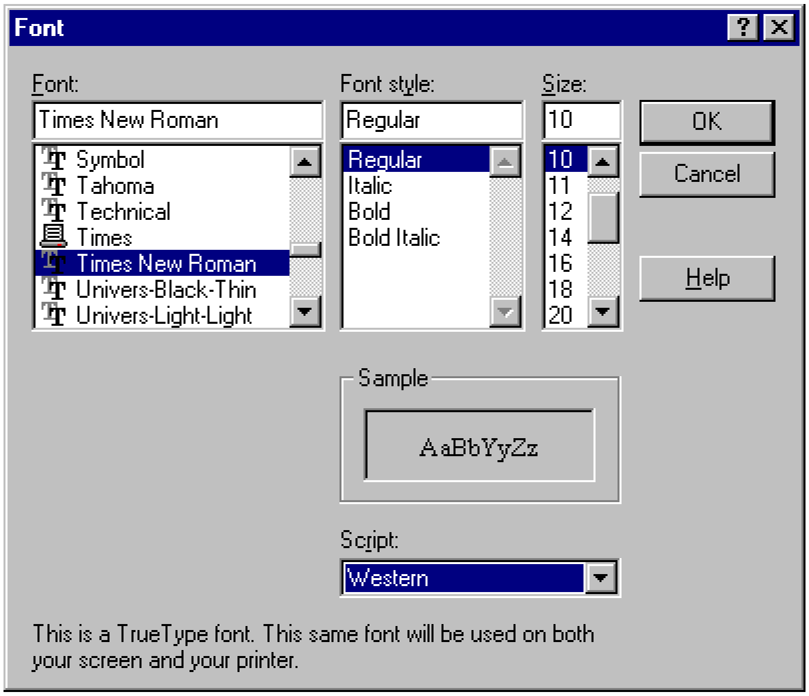
## Filters Selection Box



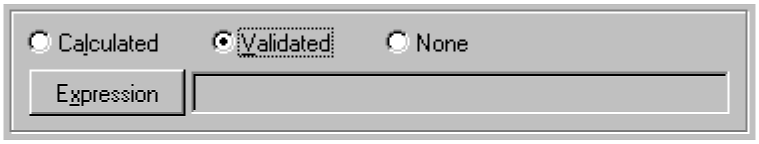
## Floating Files Dialog Box



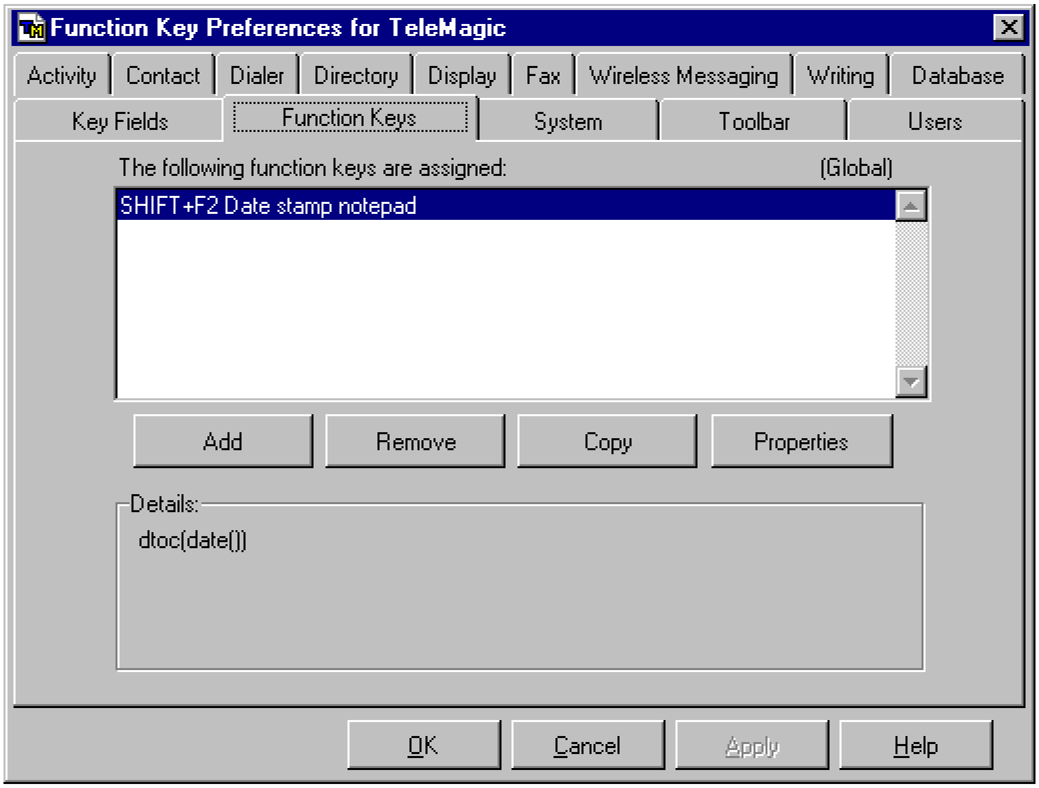
## Font Dialog Box



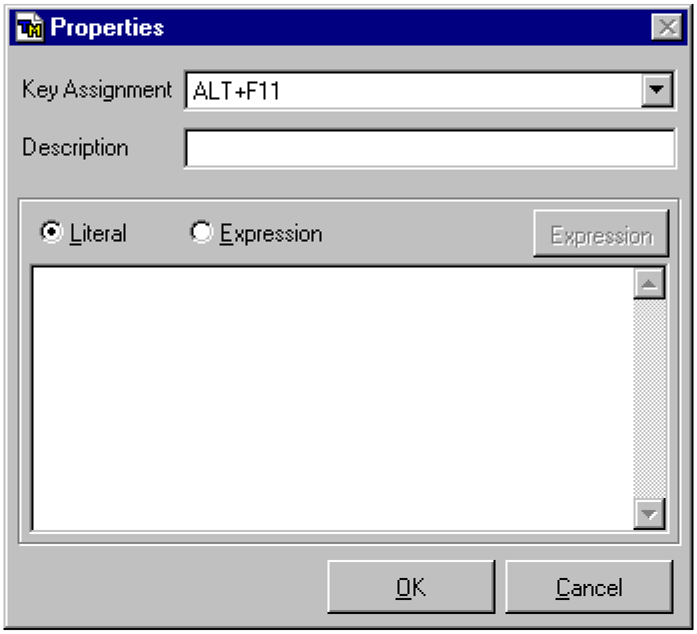
## From Expression Validation



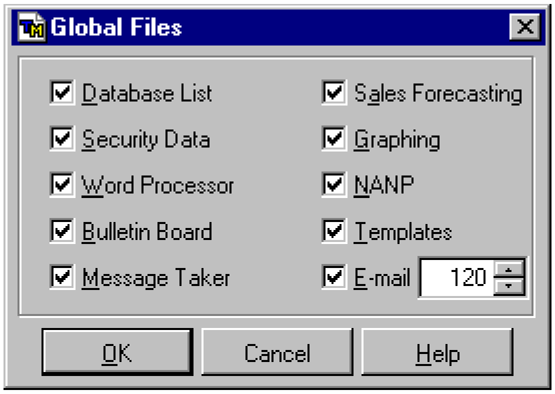
## Function Key Setup Options



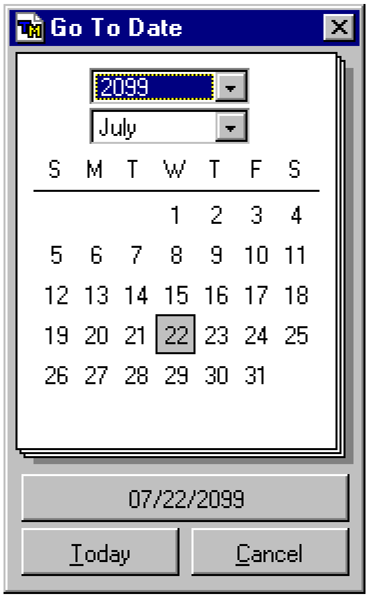
## Function Key Properties Dialog Box



## Global Files Dialog Box

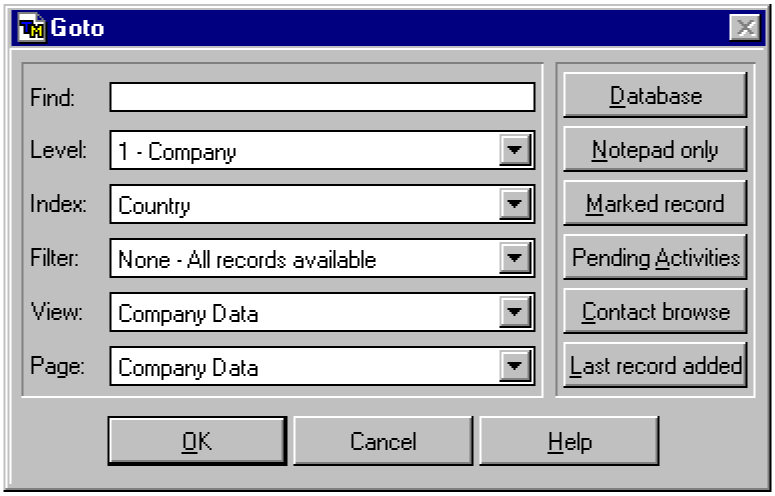


## Go to Date Dialog Box

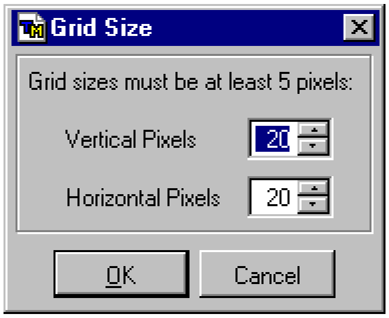



To Go to a Specific Date:

# Goto Dialog Box

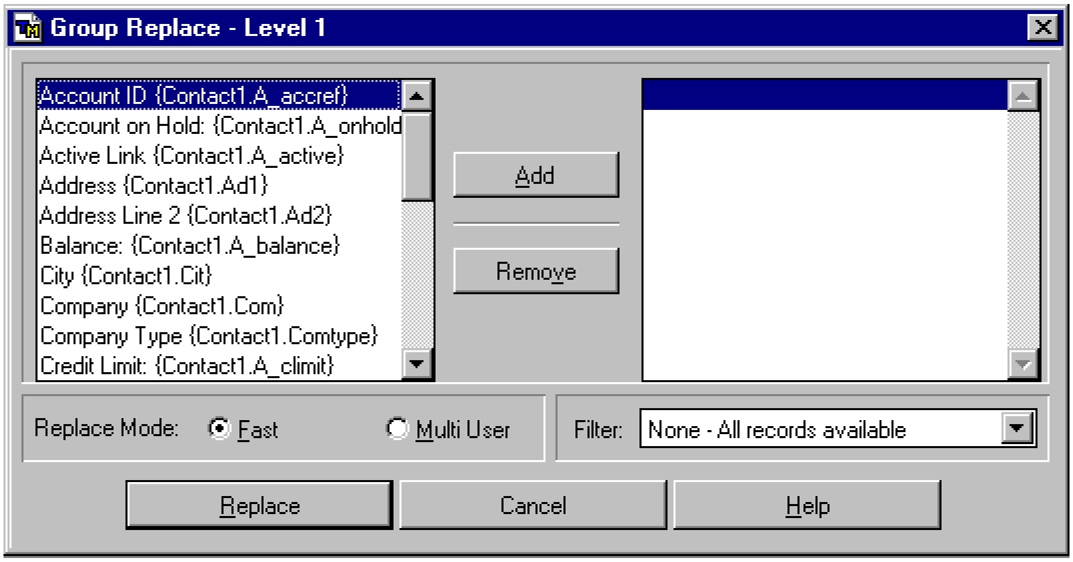


## Grid Size Dialog Box

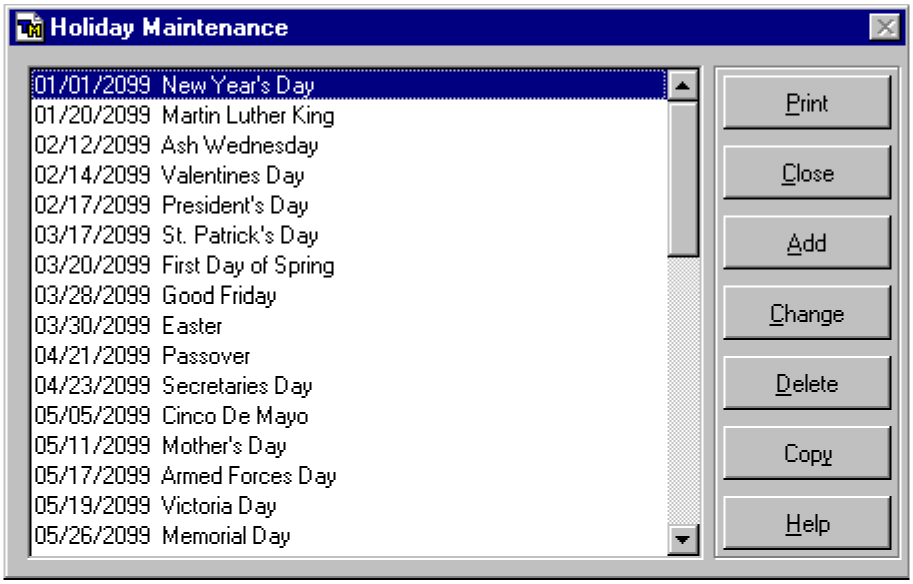


## Group Delete/Recover Dialog Box

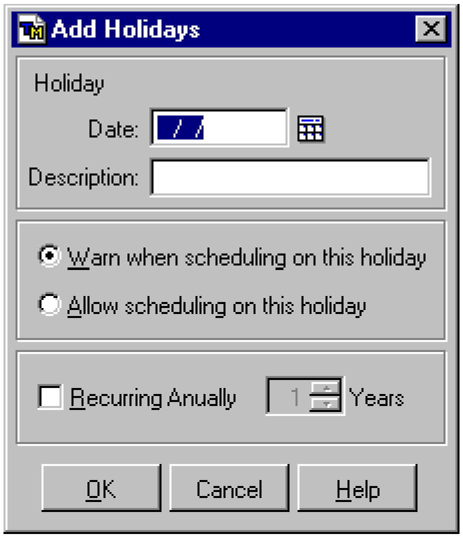
## Group Replace Dialog Box



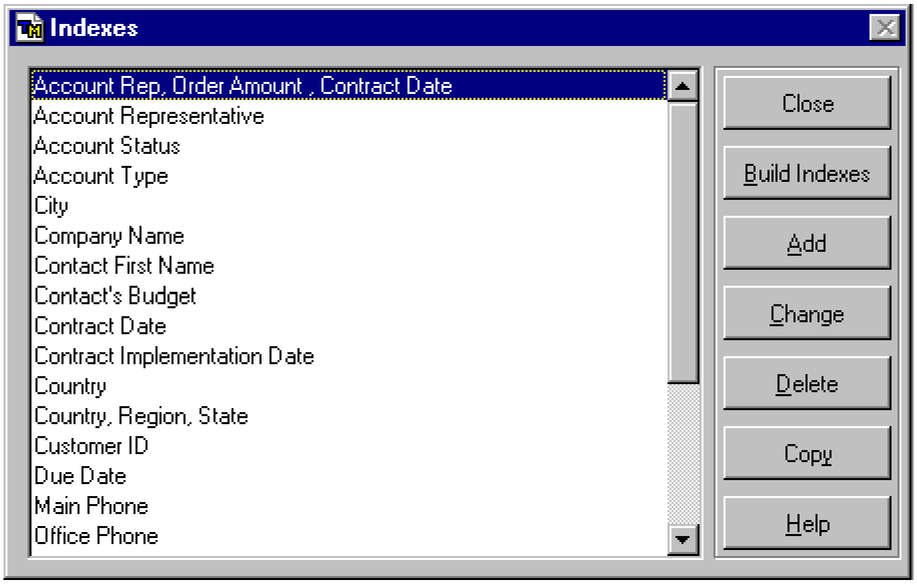
## Holiday Maintenance Selection Box



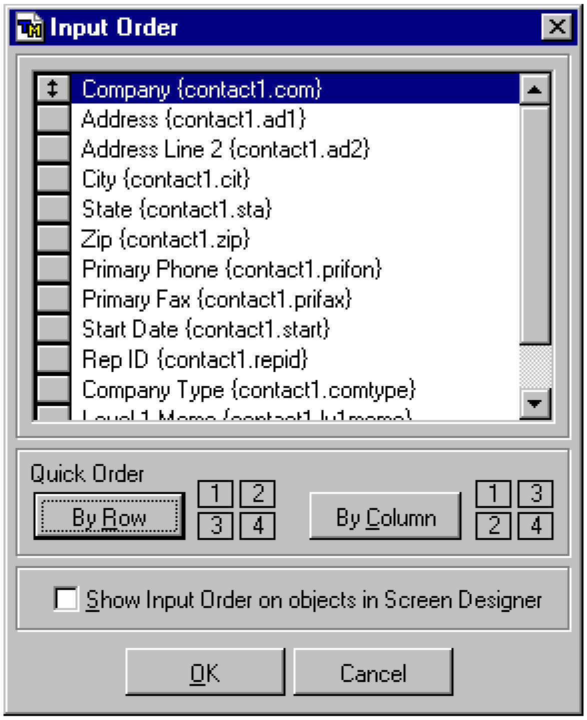
## Holiday Record Dialog Box



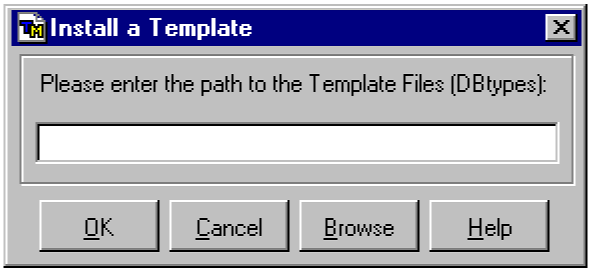
## Indexes Selection Box



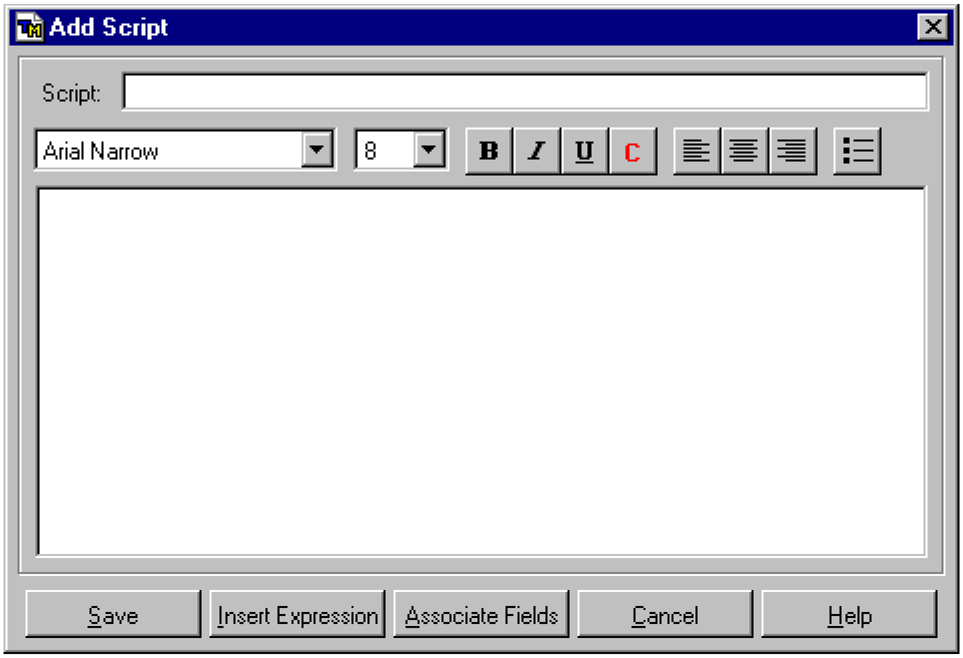
## Input Order Dialog Box



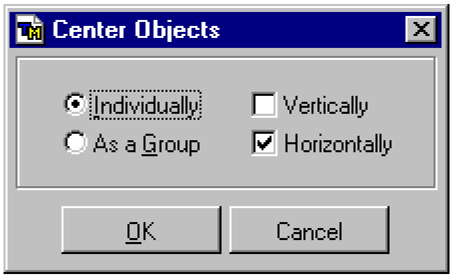
## Install a Template Dialog Box



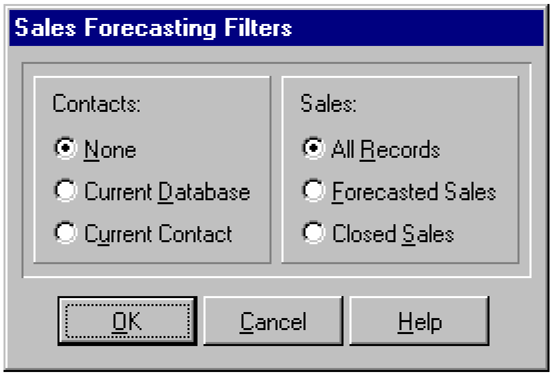
## Blank Add Script Dialog Box



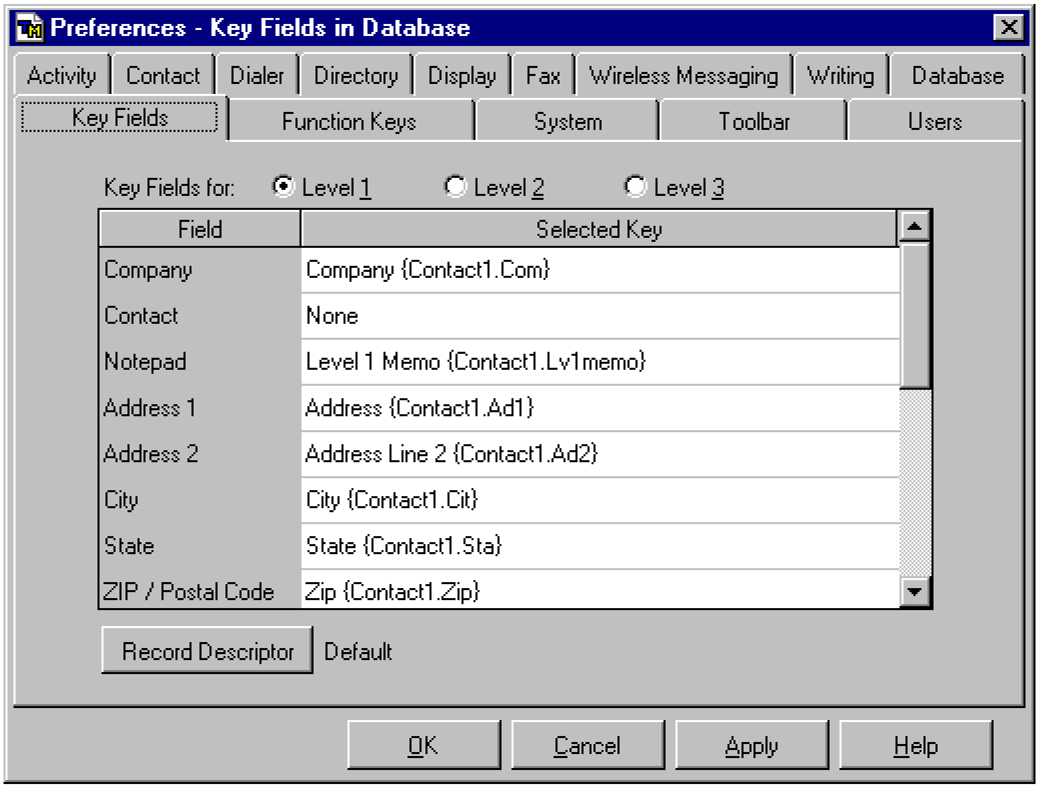
## Centering Options Dialog Box



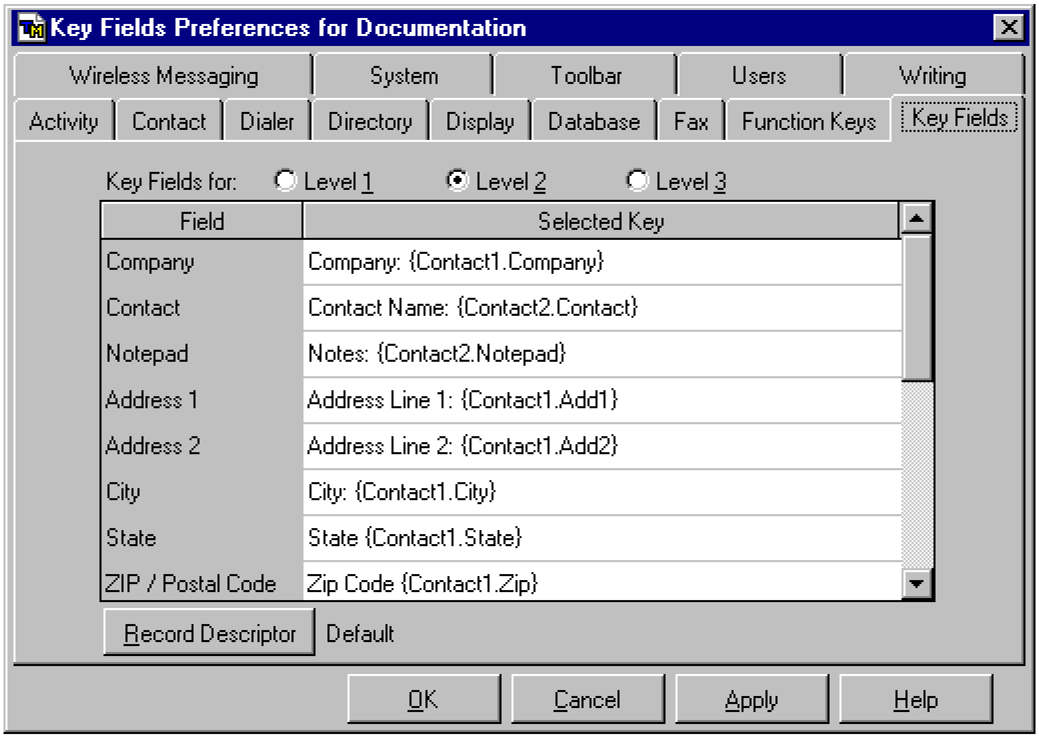
## Sales Forecasting Filters Dialog Box



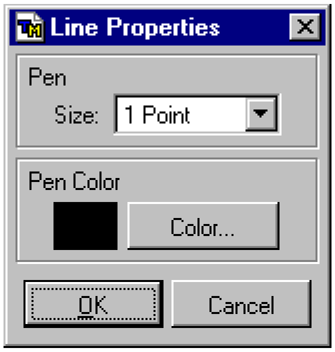
## Key Fields Dialog Box



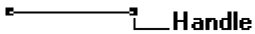
## Key Fields Screen



## Line Properties Dialog Box



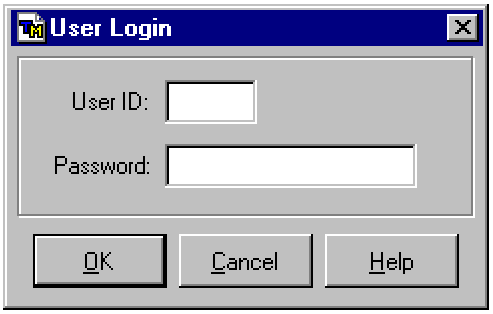
## Line Sizing Handles



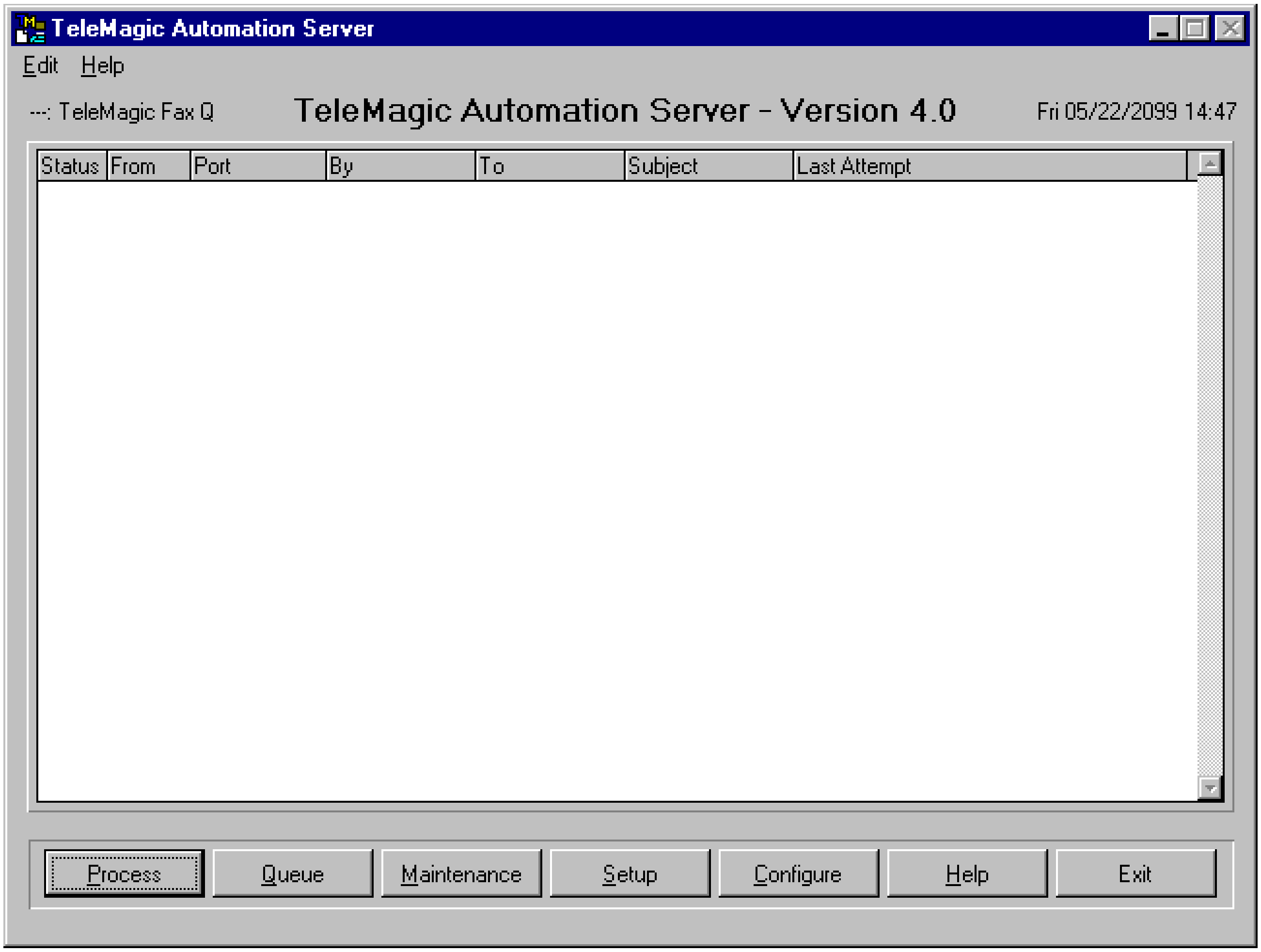
## List Arrow

-

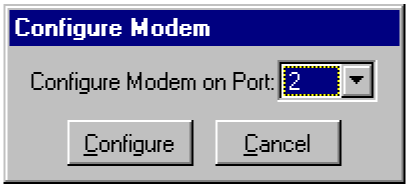
## Login Dialog Box



## Main Automation Server Screen, Showing an Empty Fax Queue



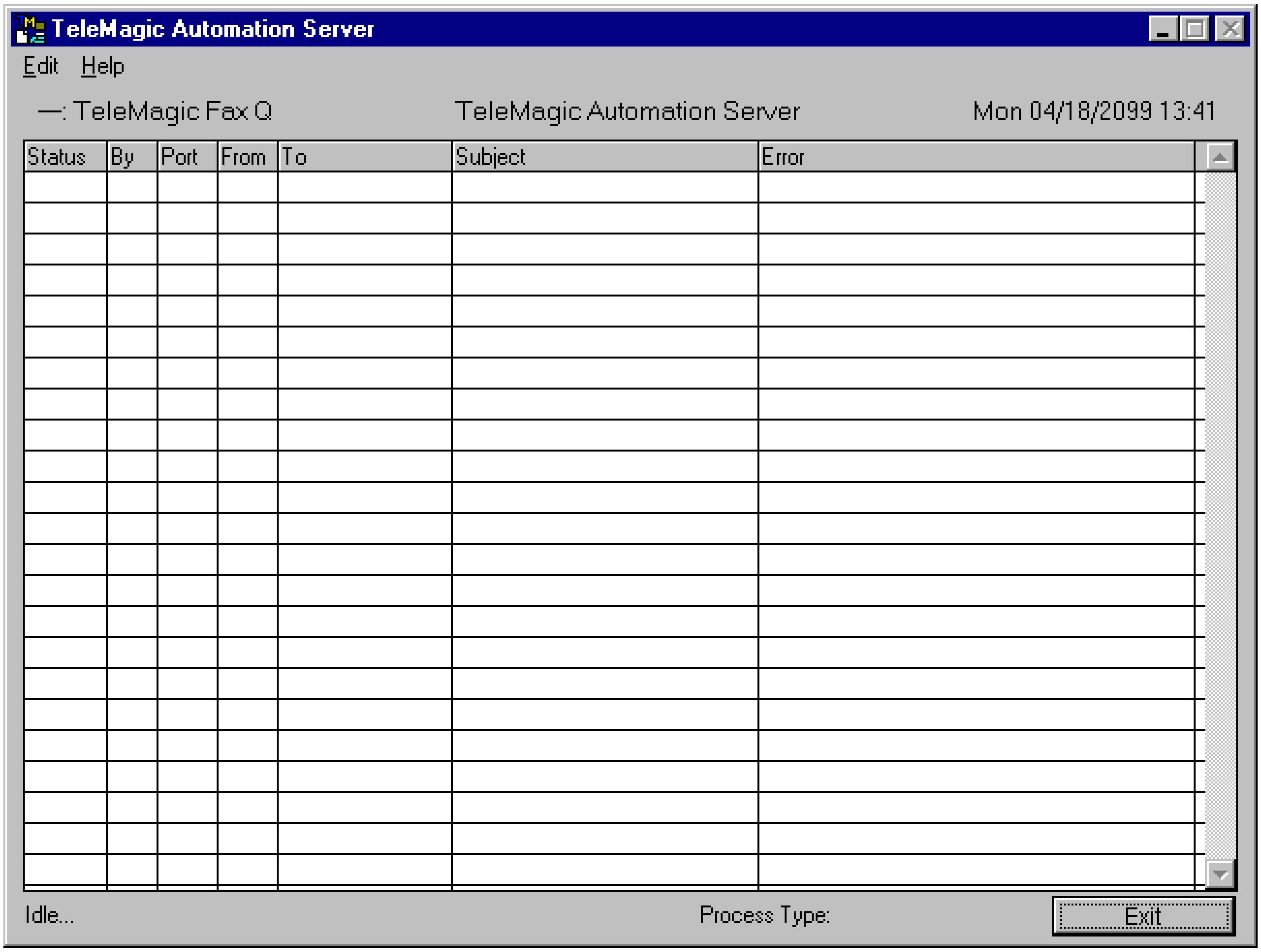
## Manual Faxmodem Configuration



## Master Password Dialog Box

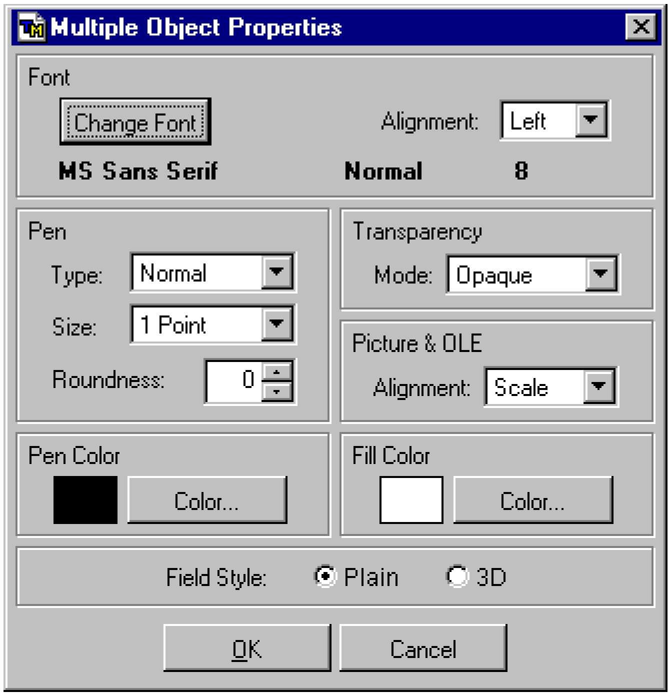
## Microsoft Word Merge Field List: Documentation Database Example

## Monitor Mode

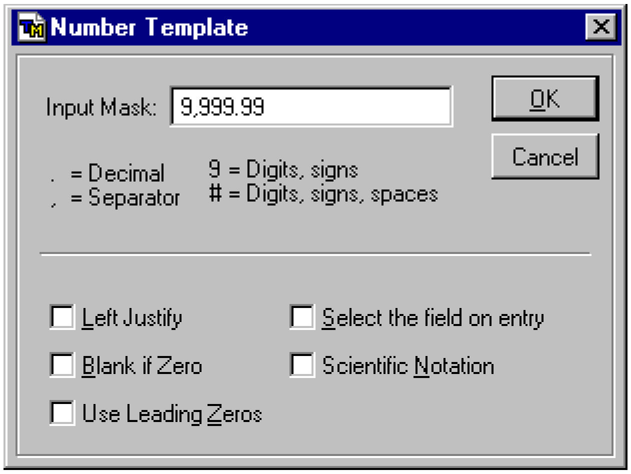


## Mover Button

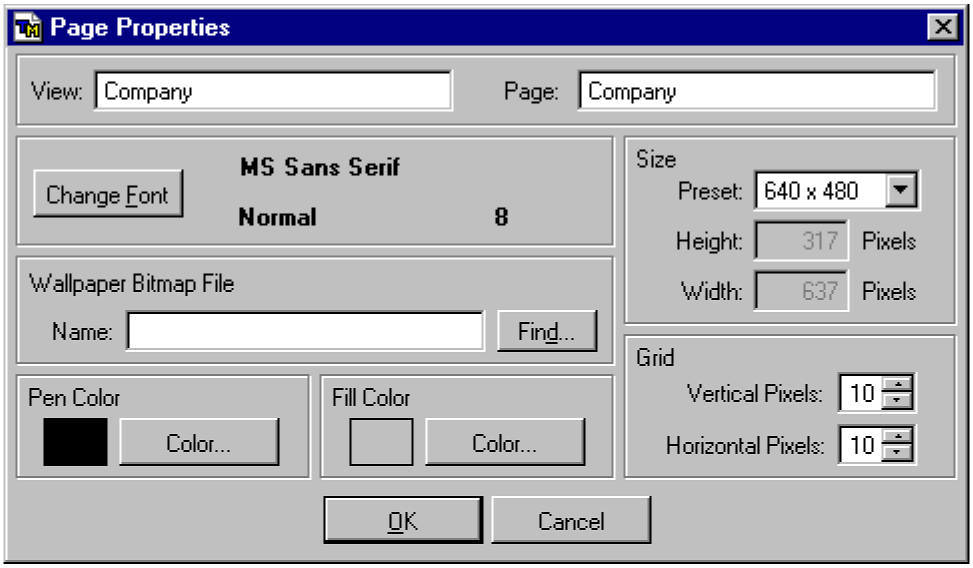
## Multiple Object Properties



## Number Template Dialog Box



## Page Properties Dialog Box

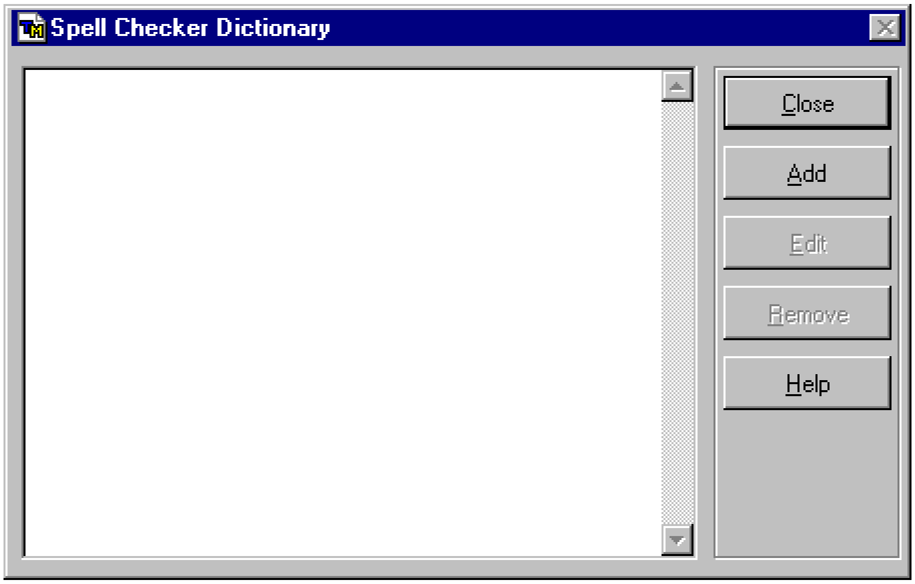


## Password Setup Dialog Box

## Pending Activity Toolbar Icon

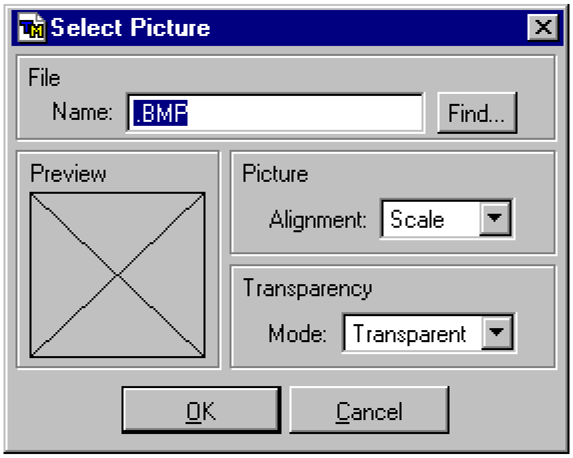
## Personal Dictionary Browse Window

## Spell Checker Dictionary Dialog Box

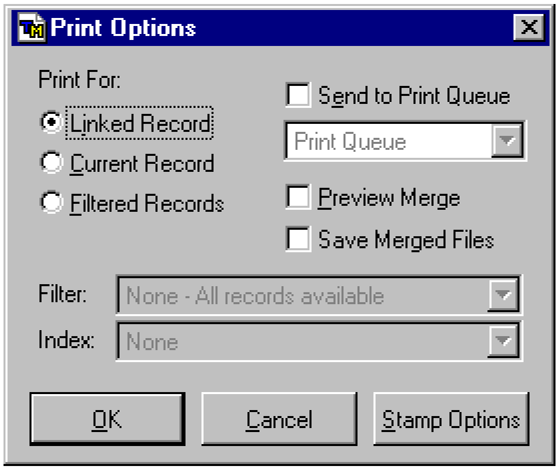


# Phone Number Template Dialog Box

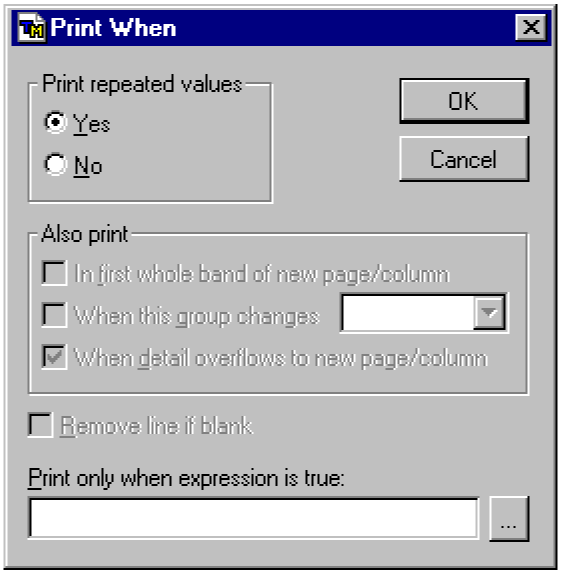
## Picture Properties Dialog Box



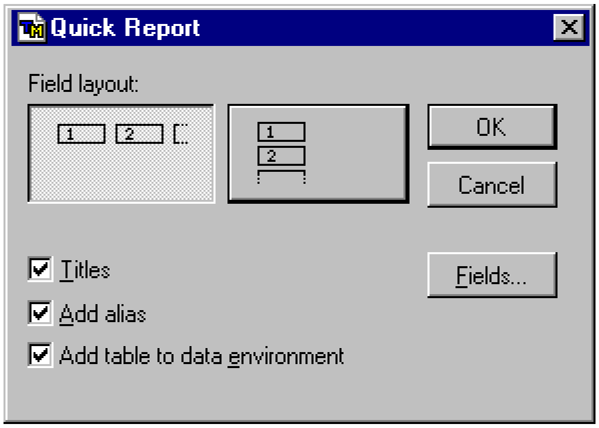
## Print Options Dialog Box



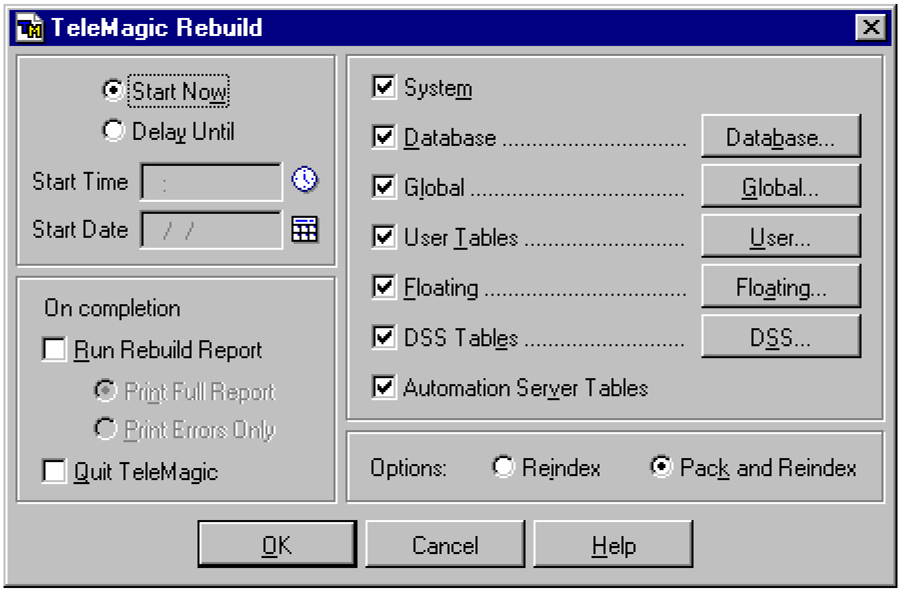
## Print When Dialog Box



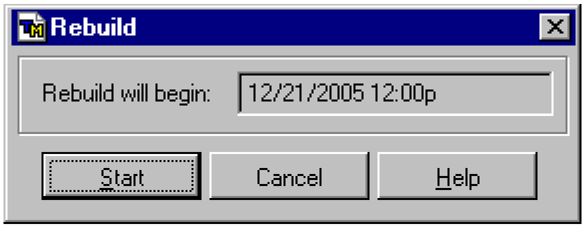
## Quick Report Dialog Box



## Rebuild Dialog Box

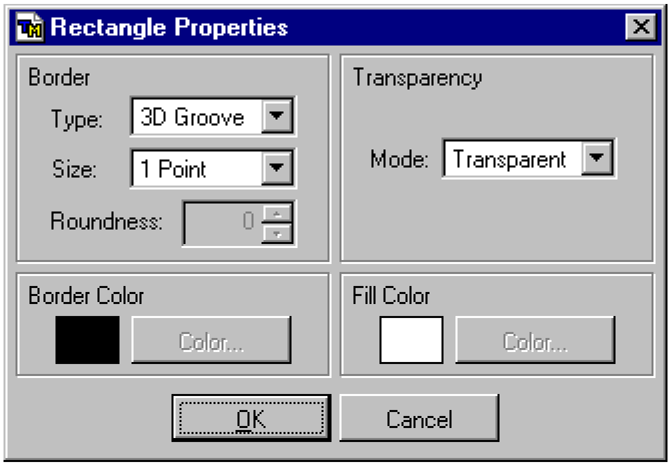


## Rebuild Wait Dialog Box

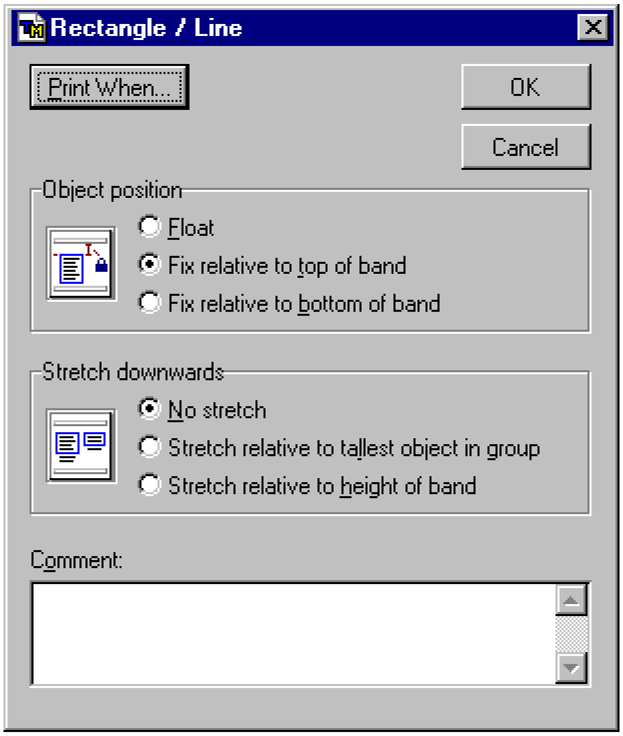


## Recall Toolbar Icon

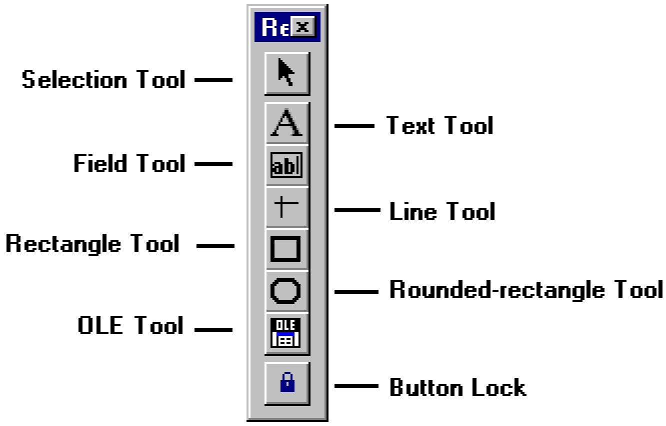
## Rectangle Properties Dialog Box



## Rectangle/Line Dialog Box

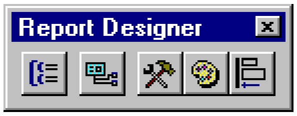


## Report Controls Toolbar



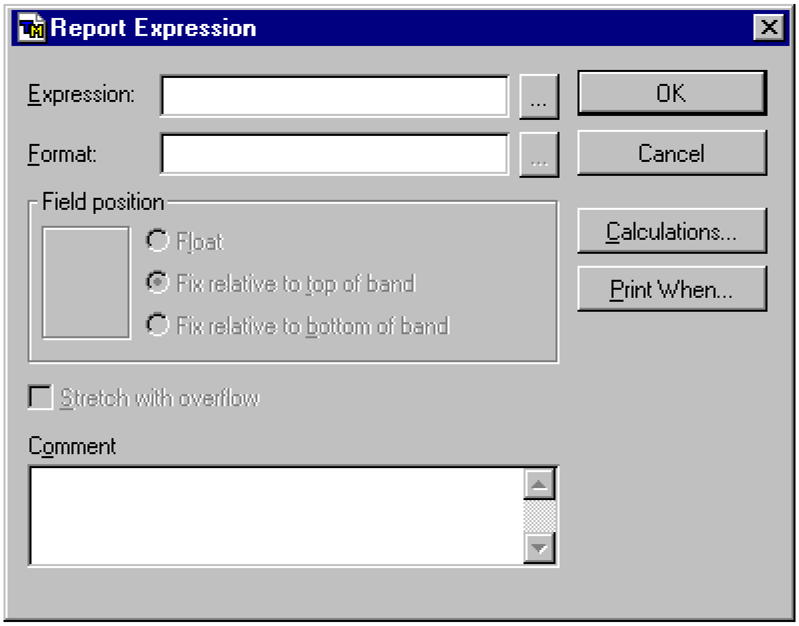

(This is a dockable toolbar , its appearance may vary)

## Report Designer Toolbar

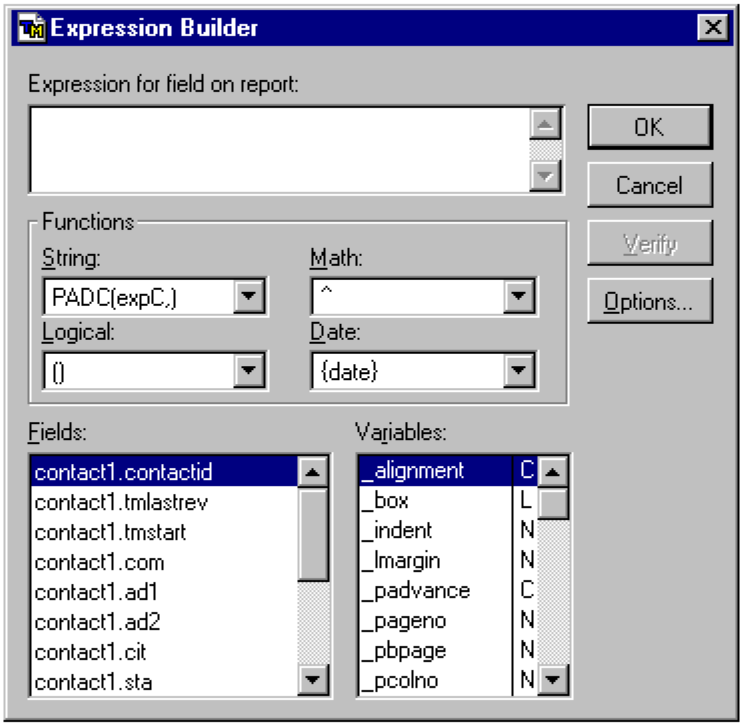



(This is a dockable toolbar , its appearance may vary)

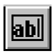
## Report Expression Dialog Box



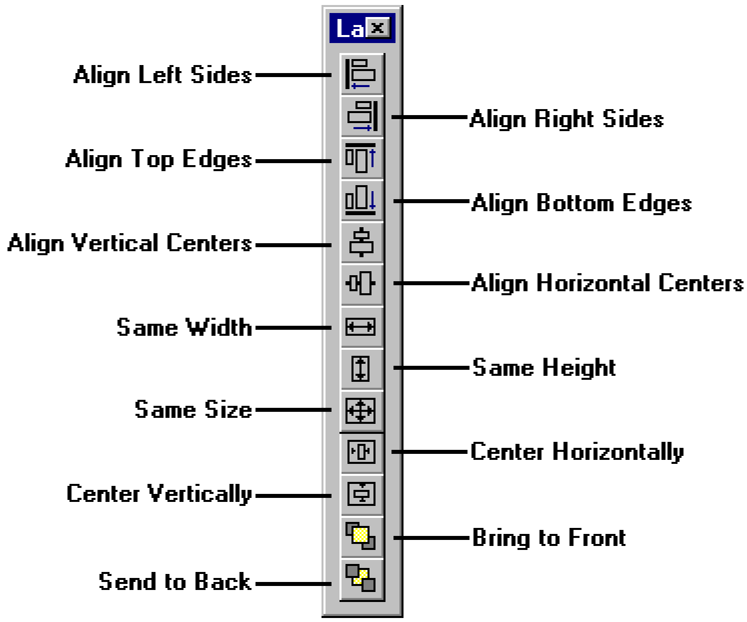
## Report Generator Expression Builder Dialog Box



## Report Generator Field Tool

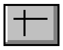


## Report Generator Layout Toolbar



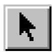

This is a Dockable Toolbar. Its actual appearance may vary.

## Report Generator Line Tool

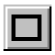


## Report Generator Picture Tool

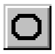
## Report Generator Pointer Tool



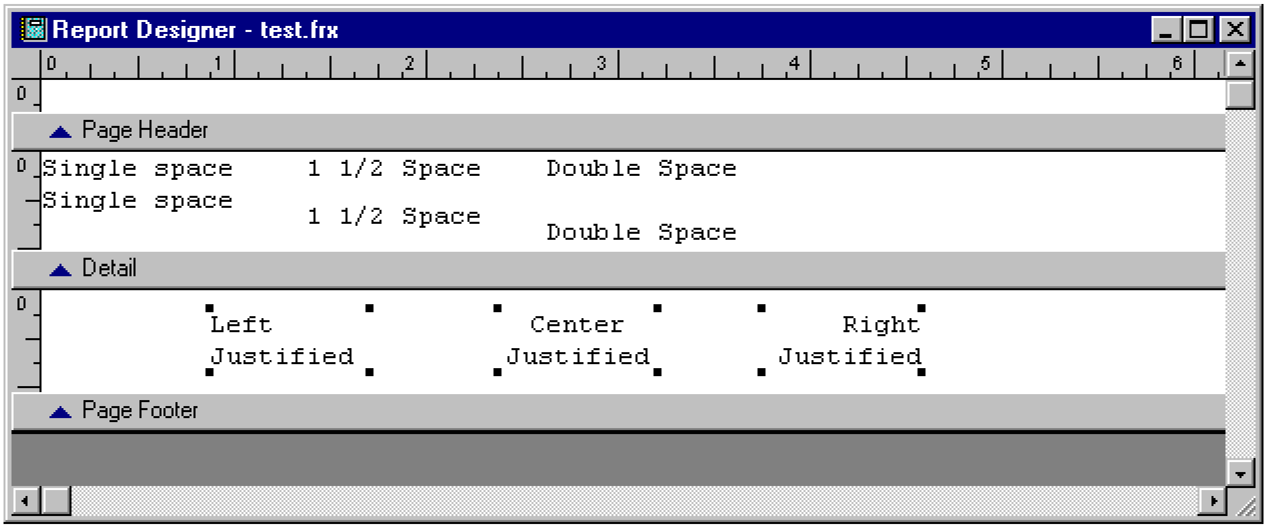
## Report Generator Rectangle Tool



## Report Generator Round Rectangle Tool

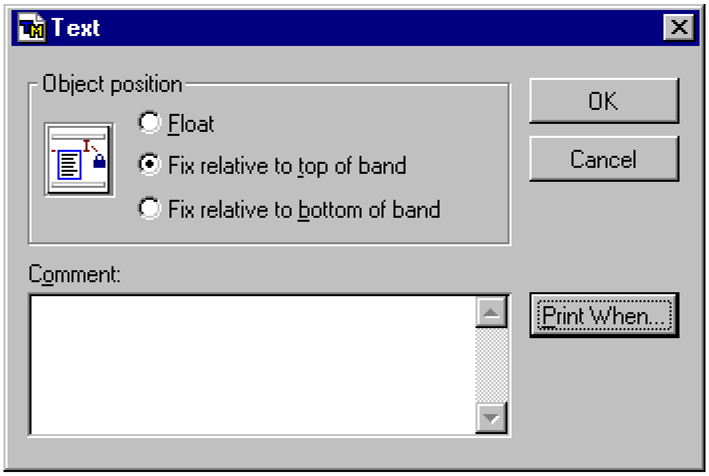


## Report Generator Text Alignment



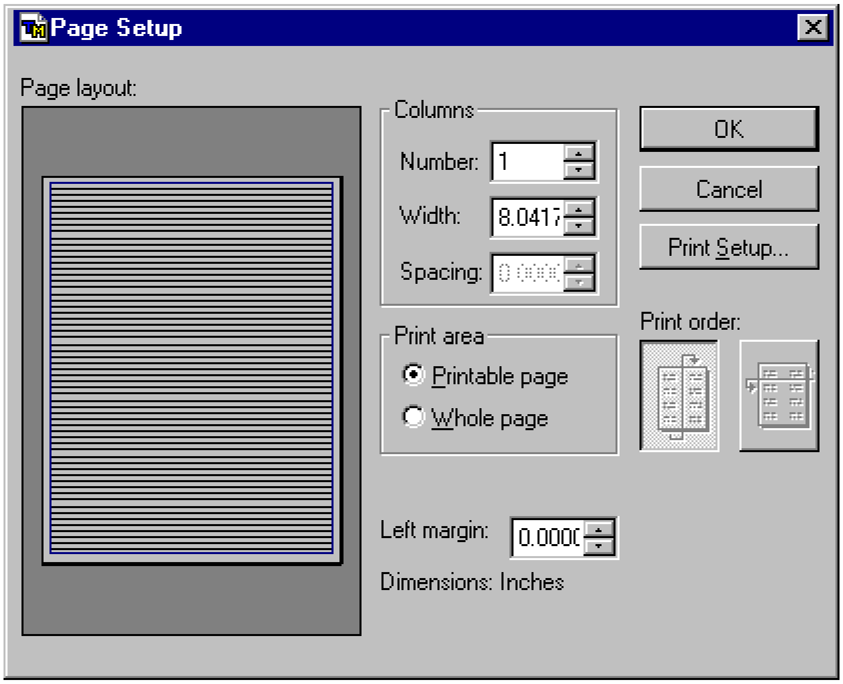

Justification is relative to the individual text object.

## Report Generator Text Dialog Box

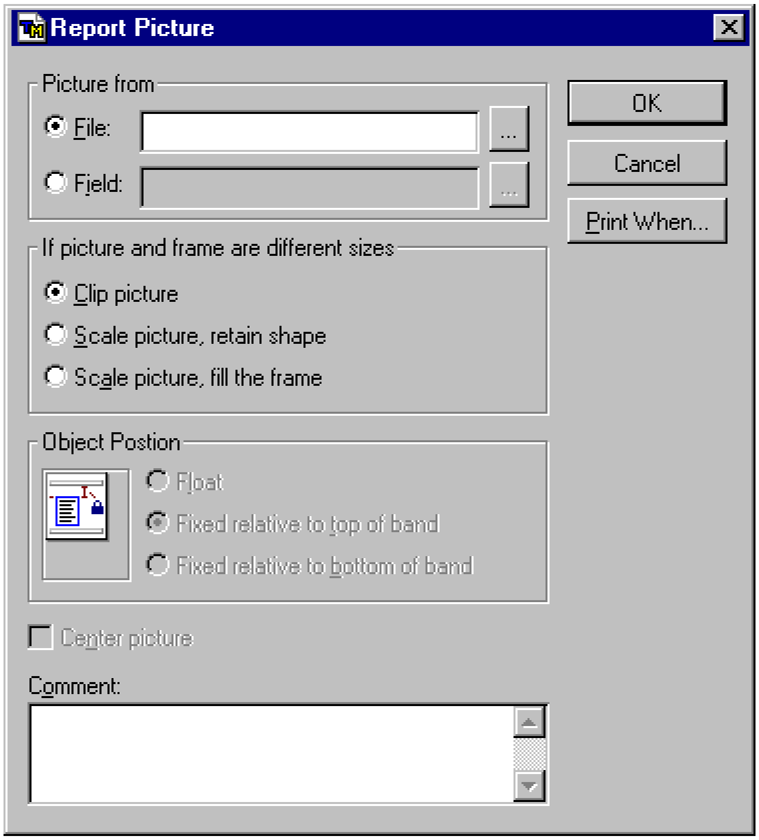


## Report Generator Text Tool

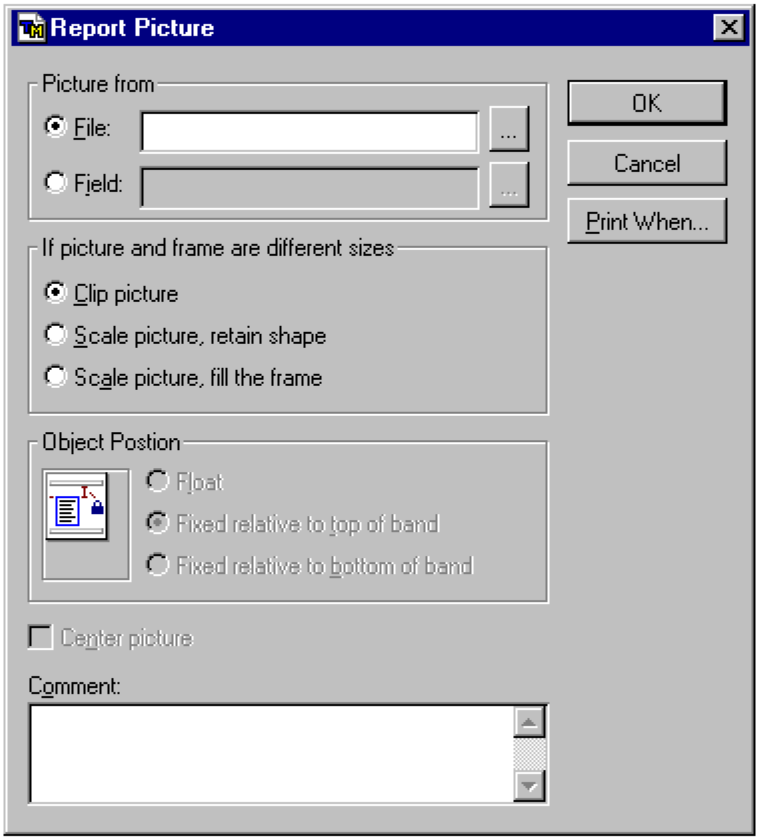
## Report Page Setup Dialog Box



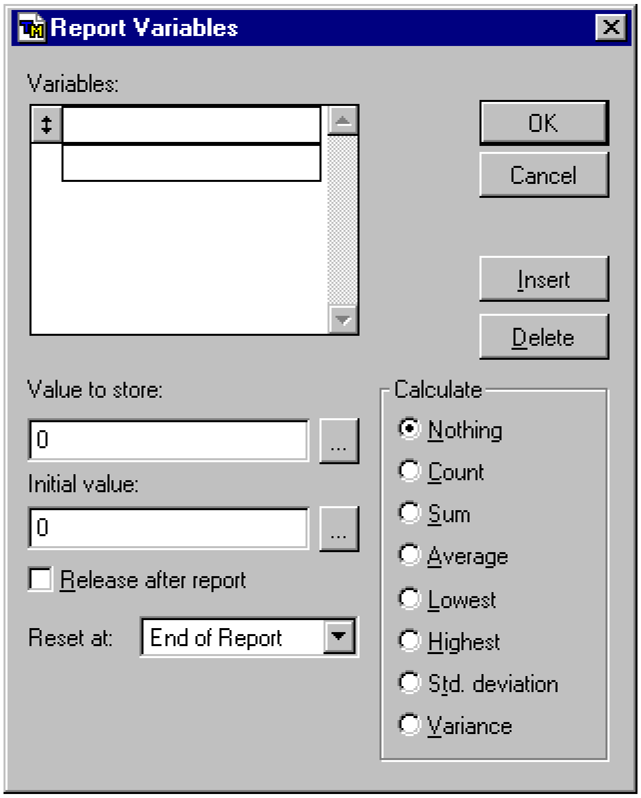
## Report Picture Dialog Box



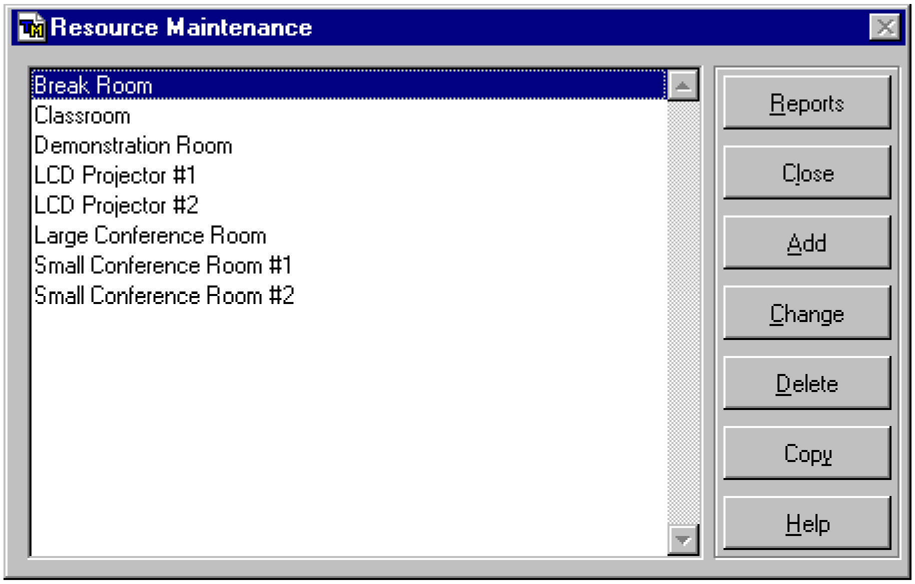
## Report Picture Dialog Box with File Radio Button Selected



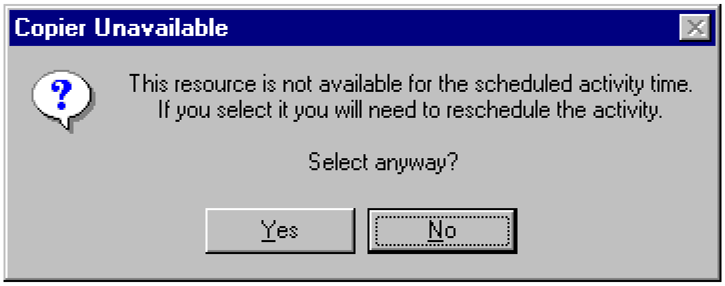
## Report Variables Dialog Box



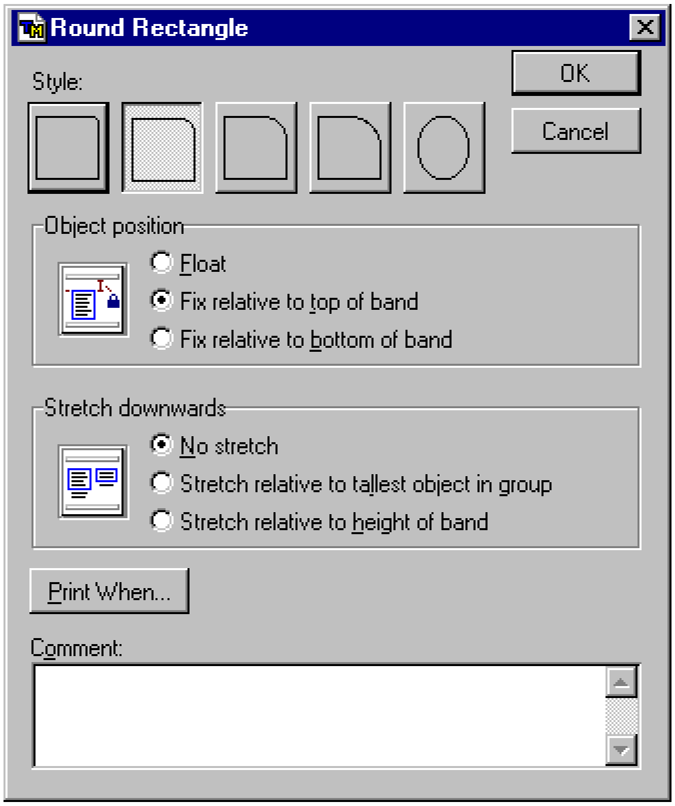
## Resource Maintenance Selection Box



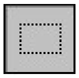
## Resource Unavailable Message



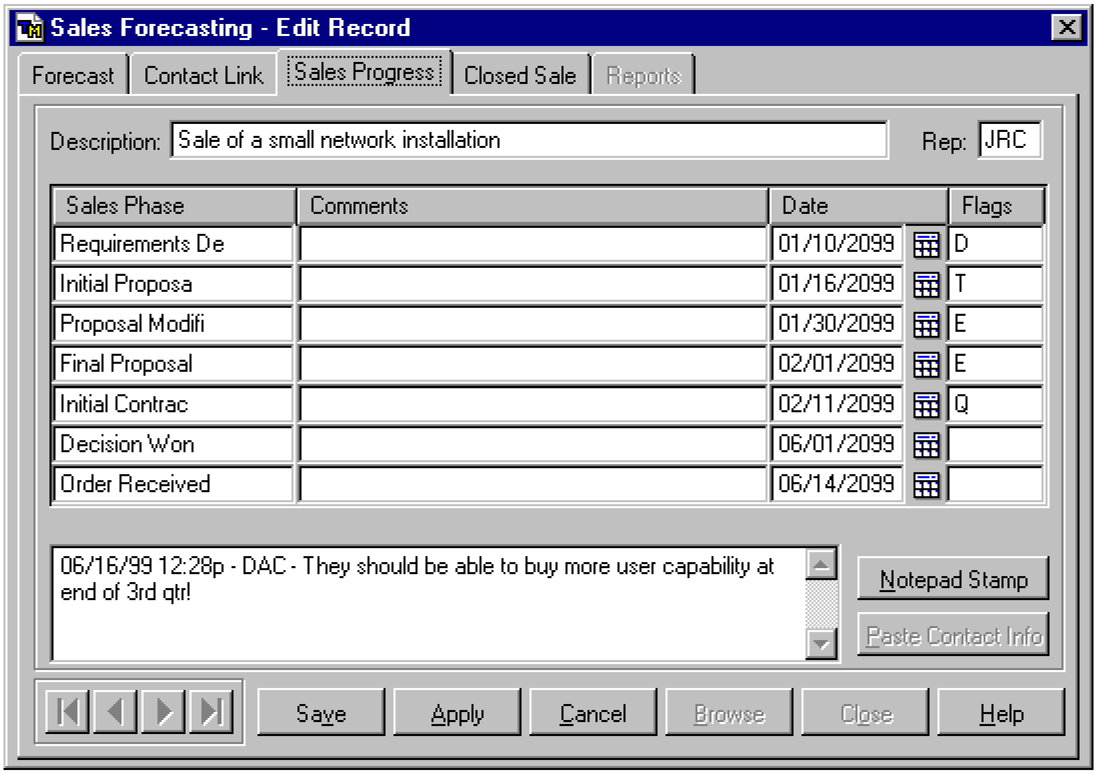
# Round Rectangle Dialog Box



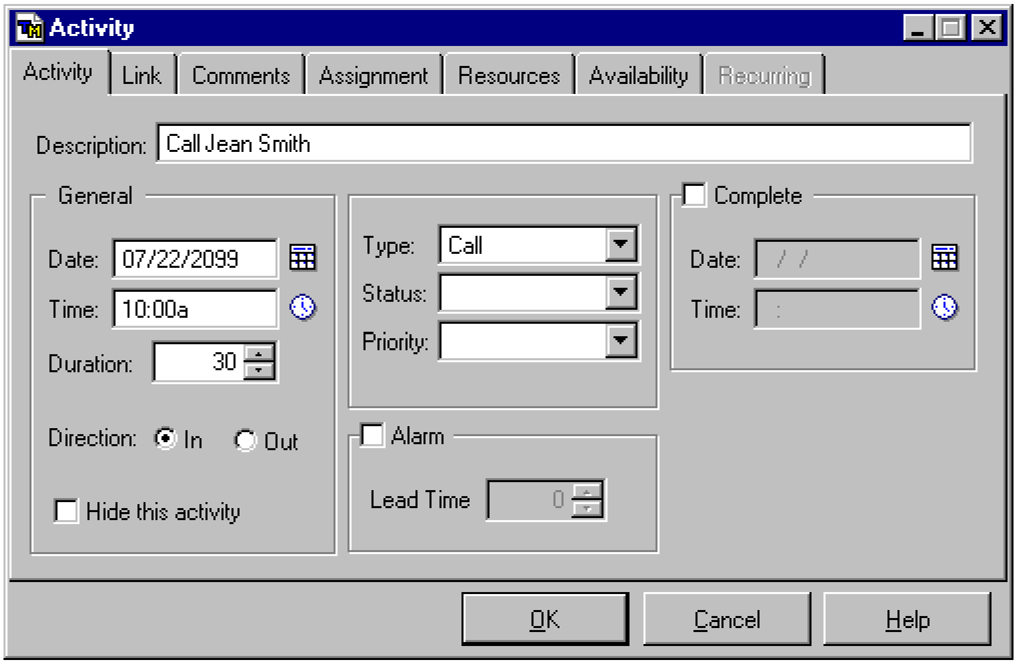
## Rubber Band Tool



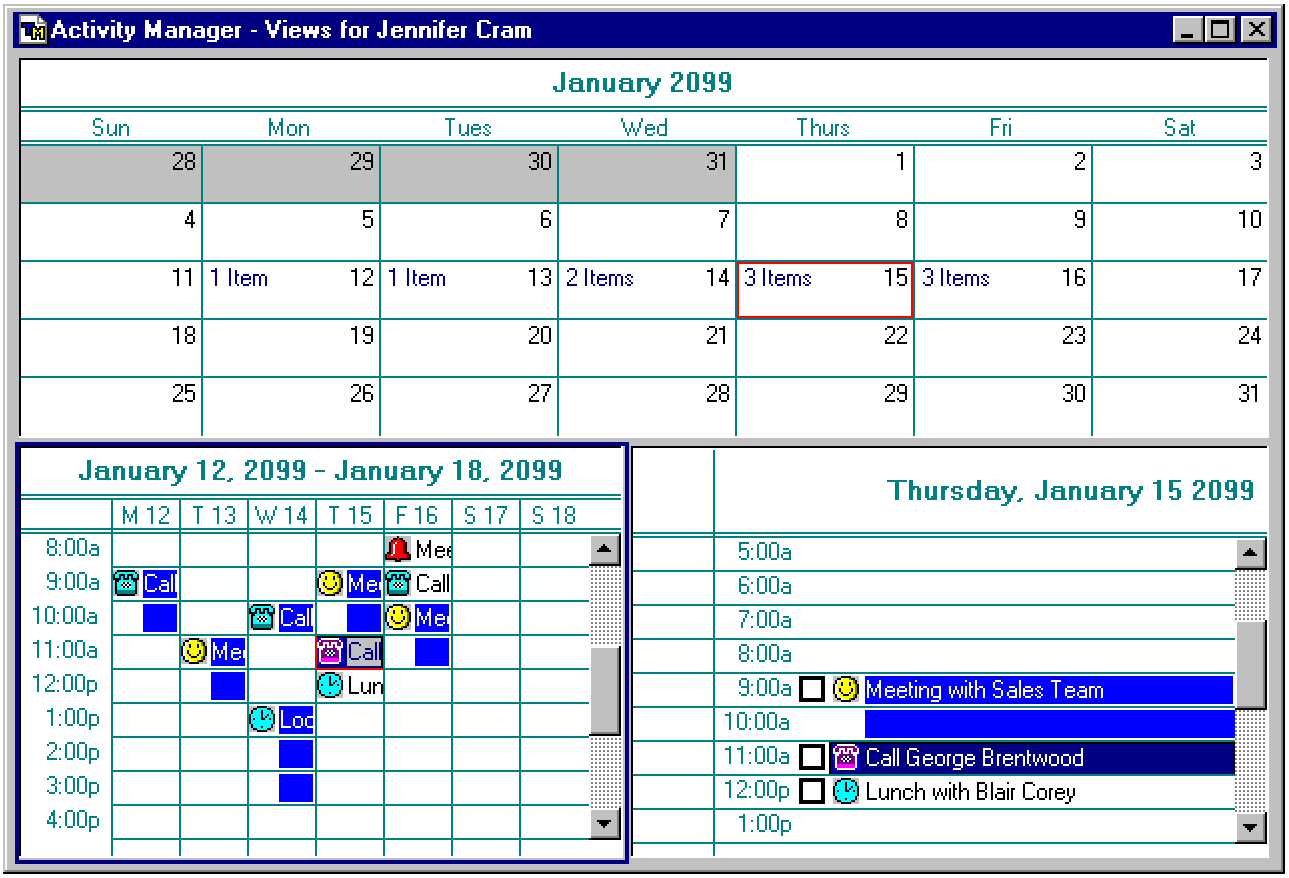
## Sales Progress Dialog Box



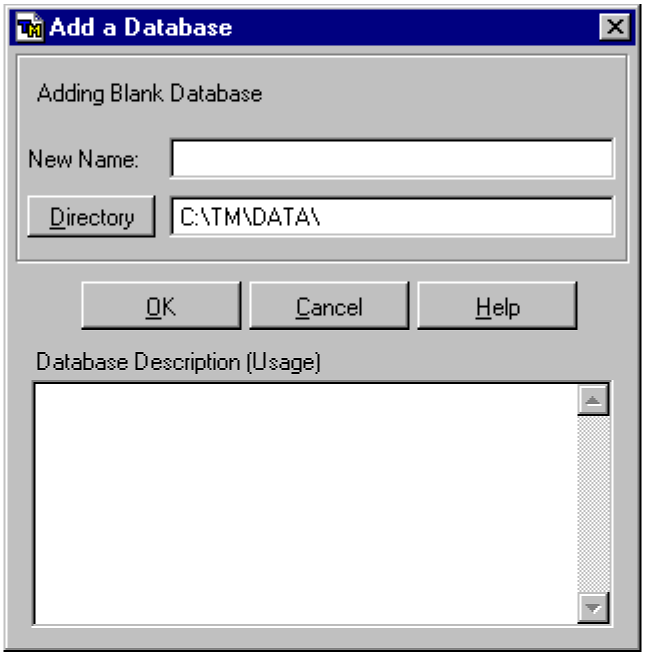
## Sample Activity Dialog Box



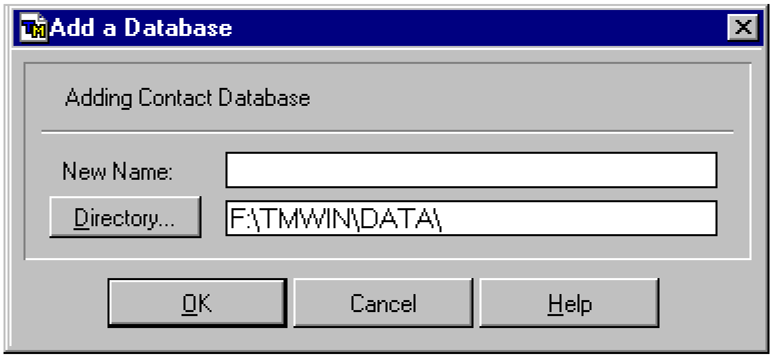
## Sample Activity Manager Month at a Time View



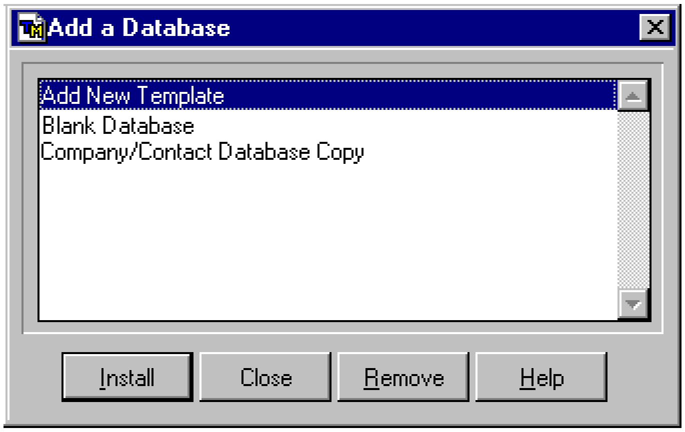
## Sample Add a Database Dialog Box



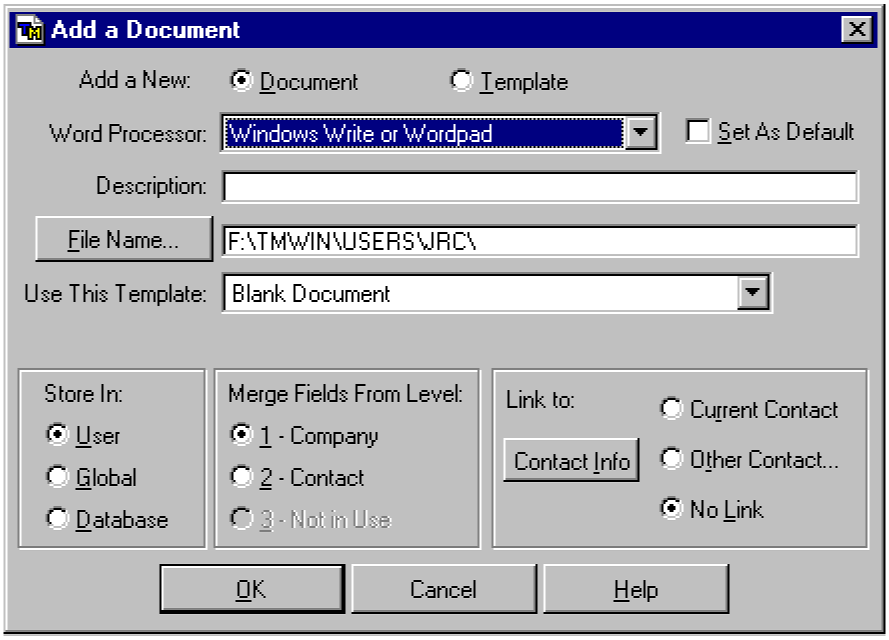
## Sample Add a Database Dialog Box (Based on Template)



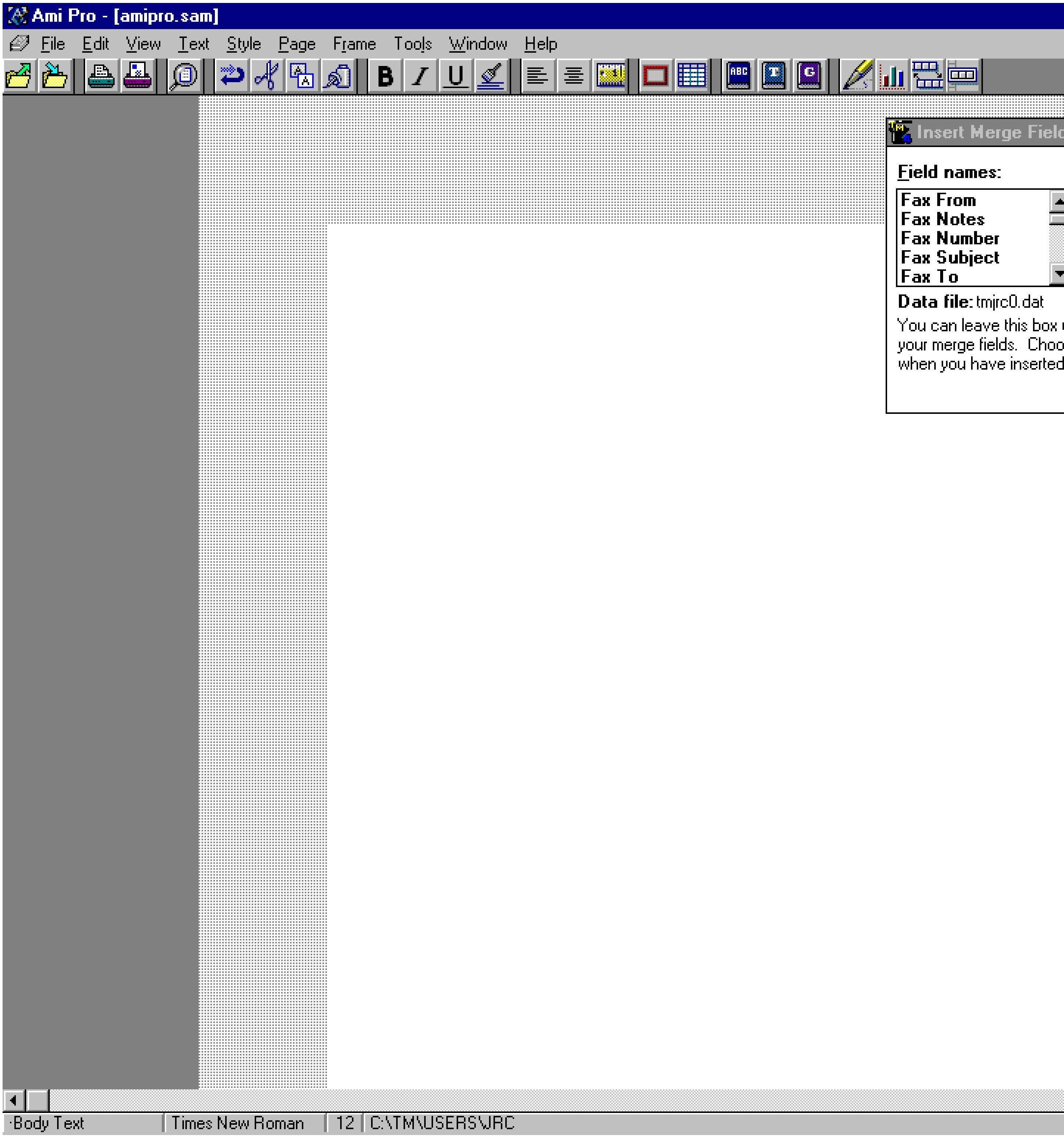
## Sample Add a Database Screen with Templates



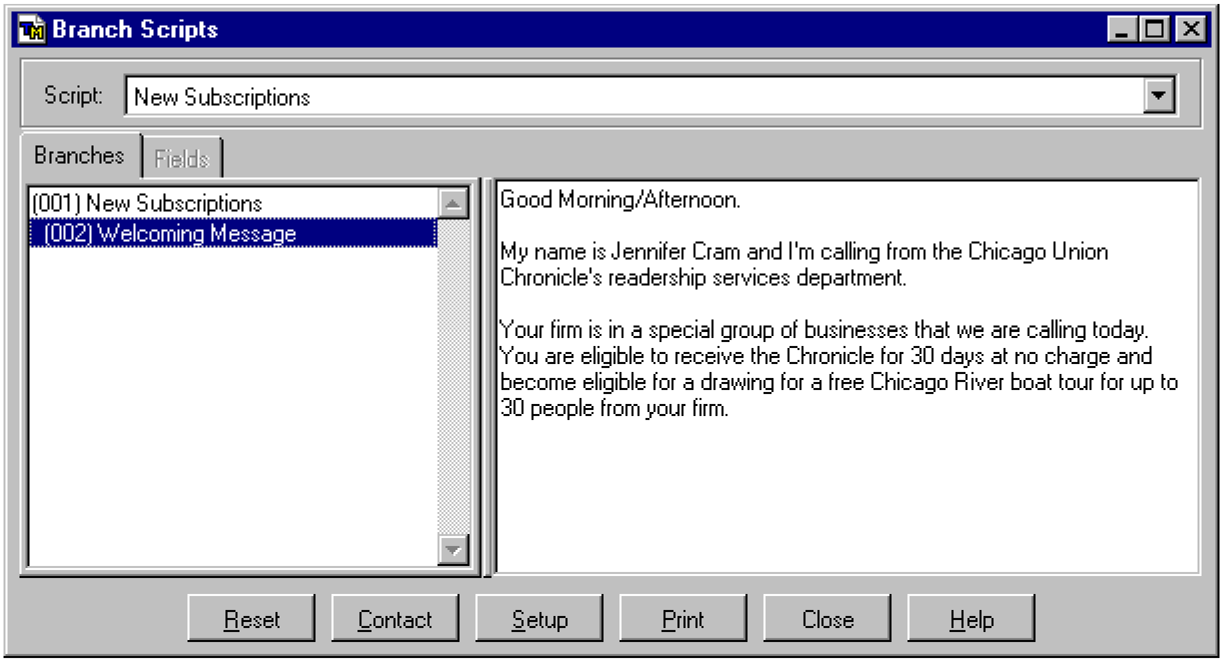
## Sample Add a Document Dialog Box



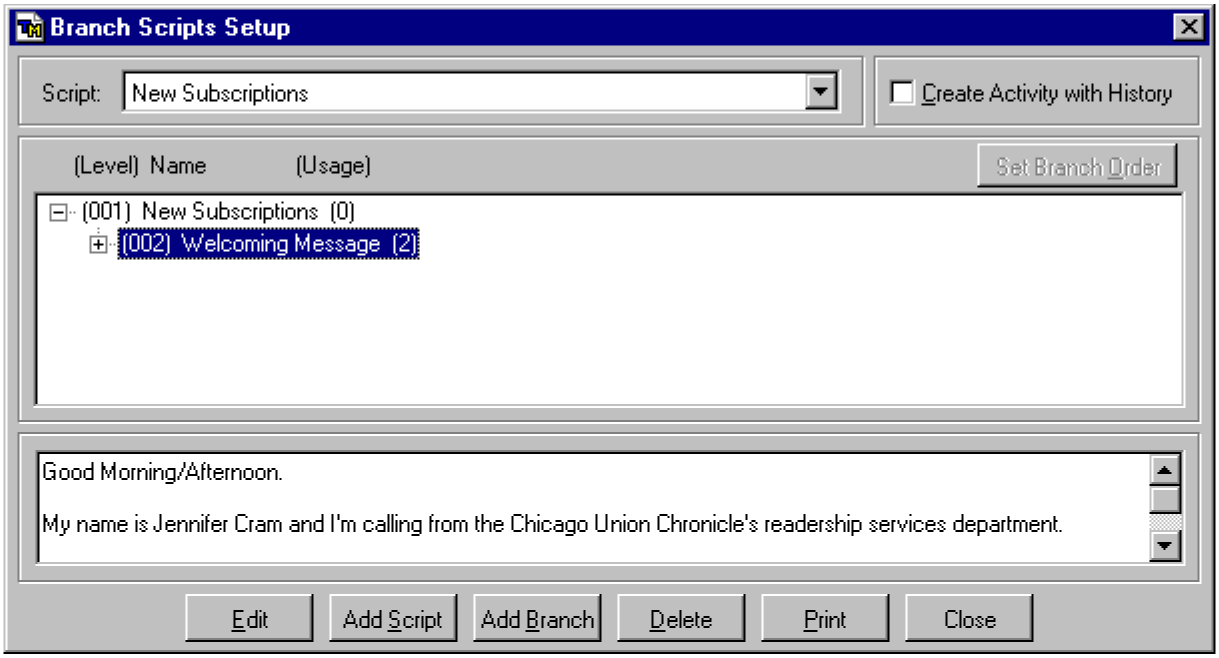
# Sample Ami Pro Document



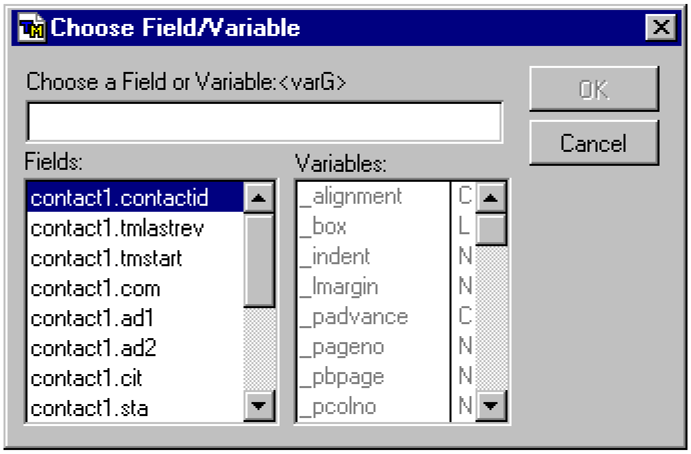
## Sample Branch Scripts Dialog Box



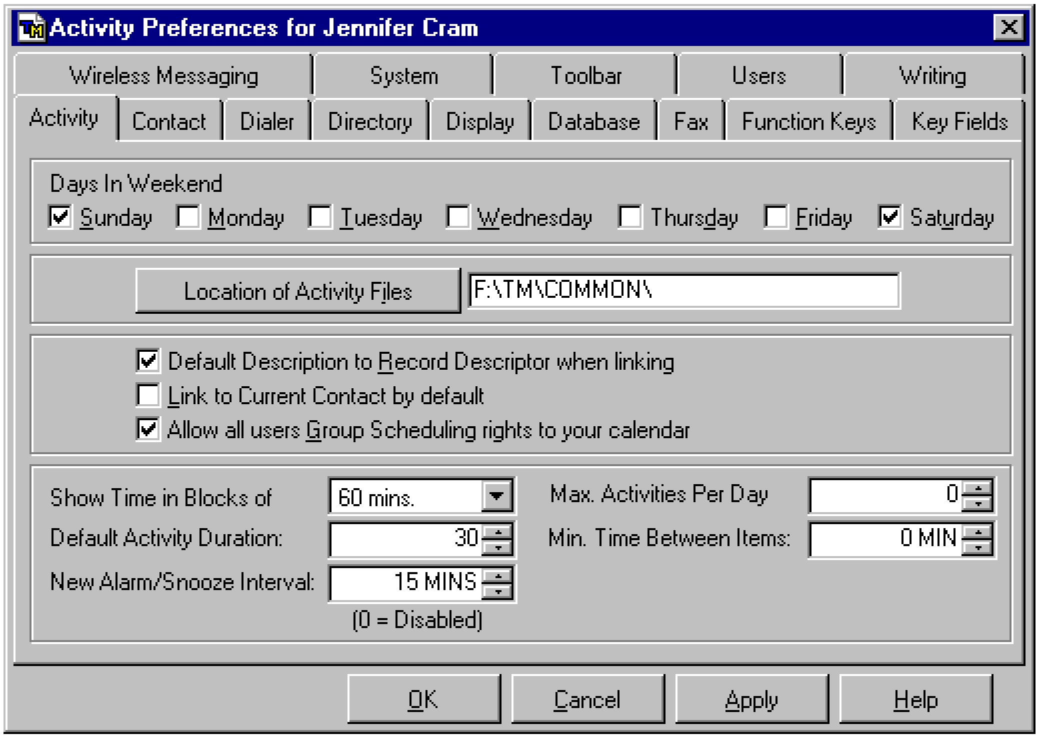
## Sample Branch Scripts Setup Dialog Box



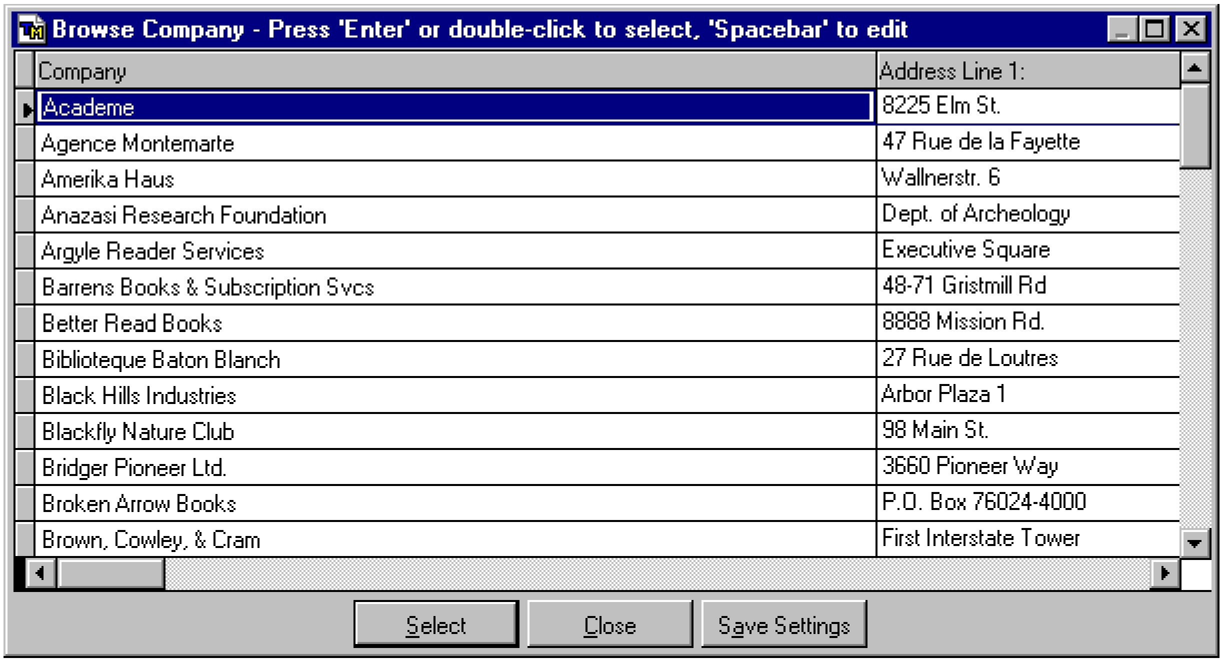
### Sample Choose Field/Variable Dialog Box With General OLE Field Selected



## Sample Preferences... Dialog Box

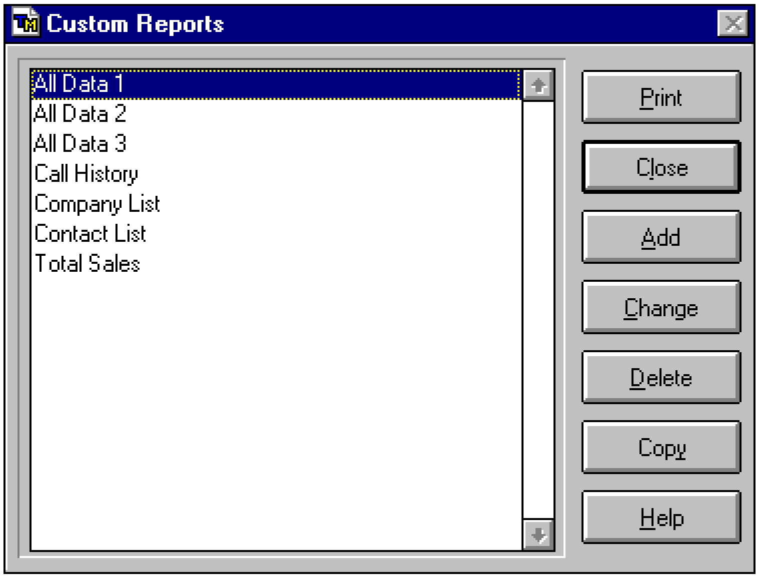


## Sample Contact Browse Window

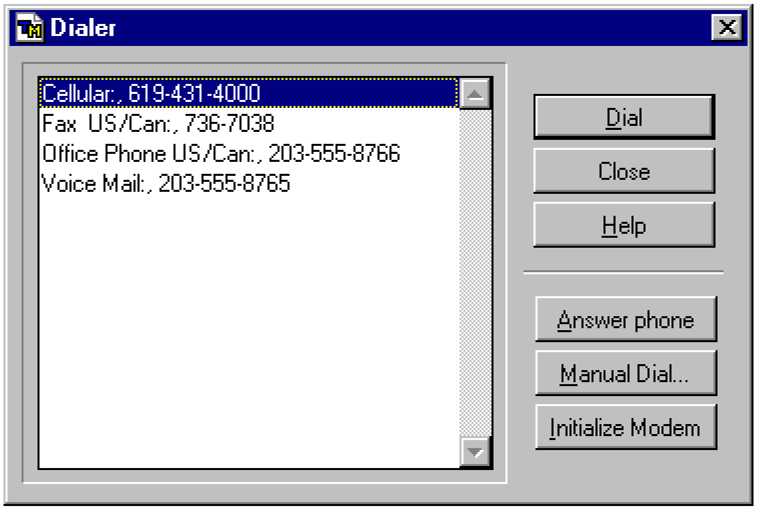


## Sample Contact Information Pop-up For Linked Record

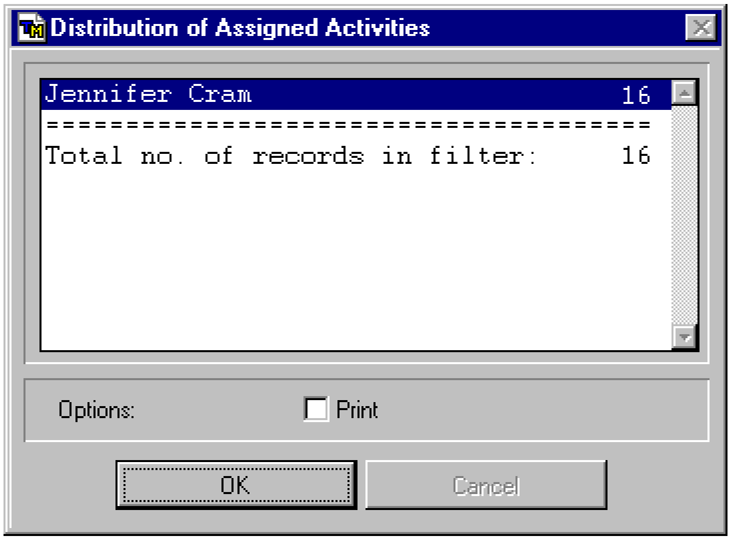
## Sample Custom Reports Selection Box



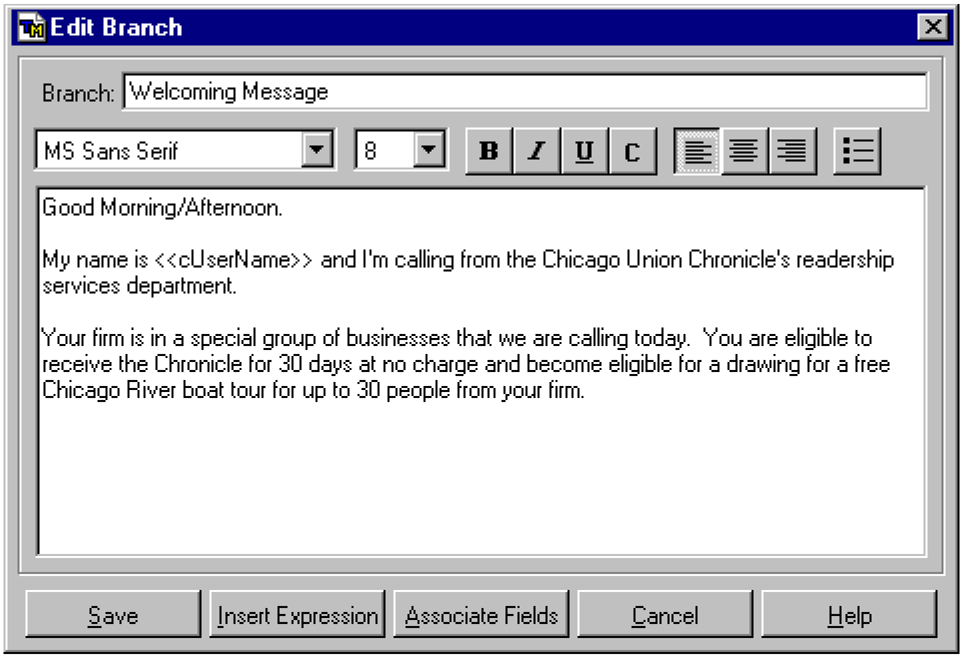
## Sample Dialer Selection Box



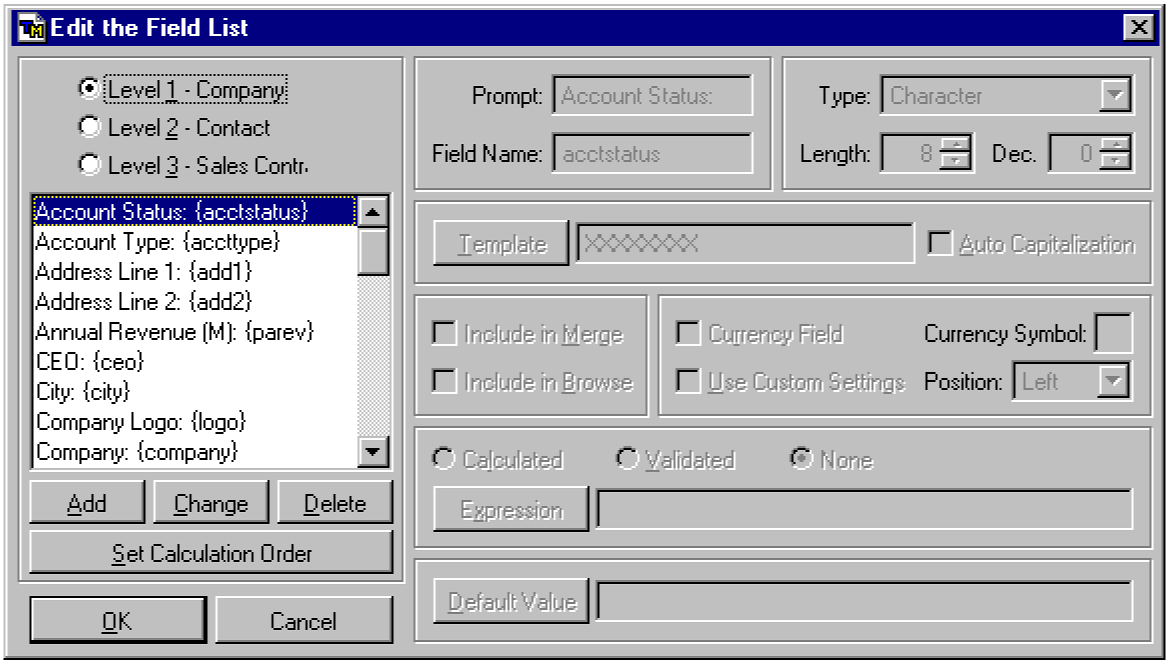
## Sample Distribution of Assigned Activities



## Sample Edit Branch Dialog Box

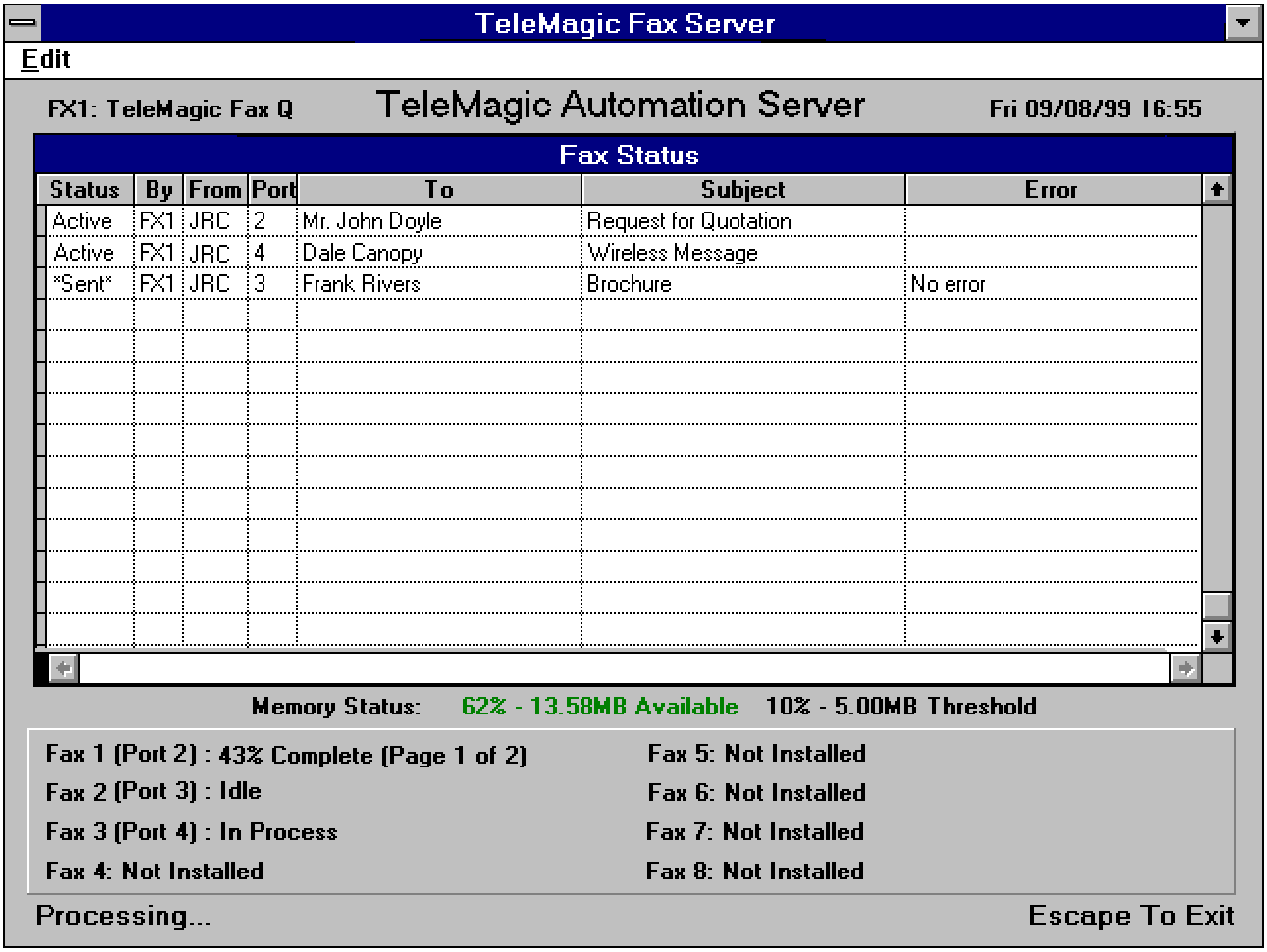


## Sample Edit the Field List Dialog Box



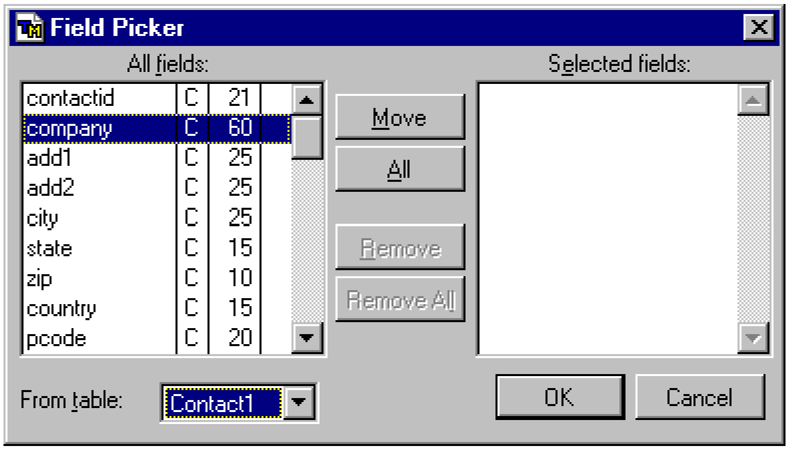

(Your list of fields may appear different)

## Sample Automation Server Processing Screen



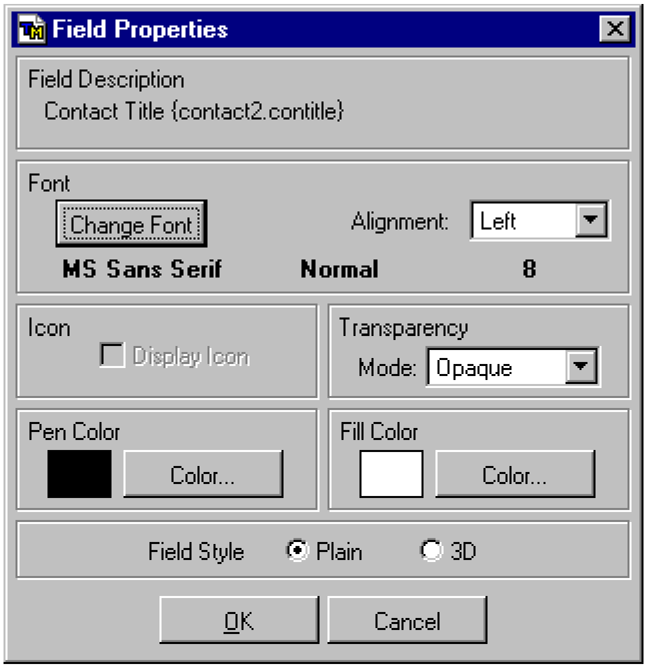

(During server downtime periods you will see a “Server is Offline” message instead of this browse list.)

## Sample Field Picker Dialog Box



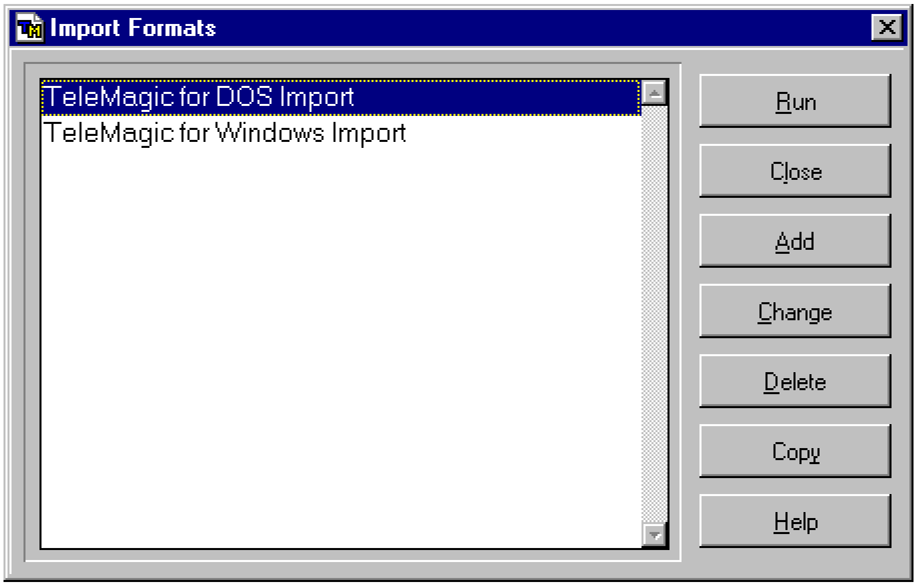

Your field list may be different

## Sample Field Properties Dialog Box

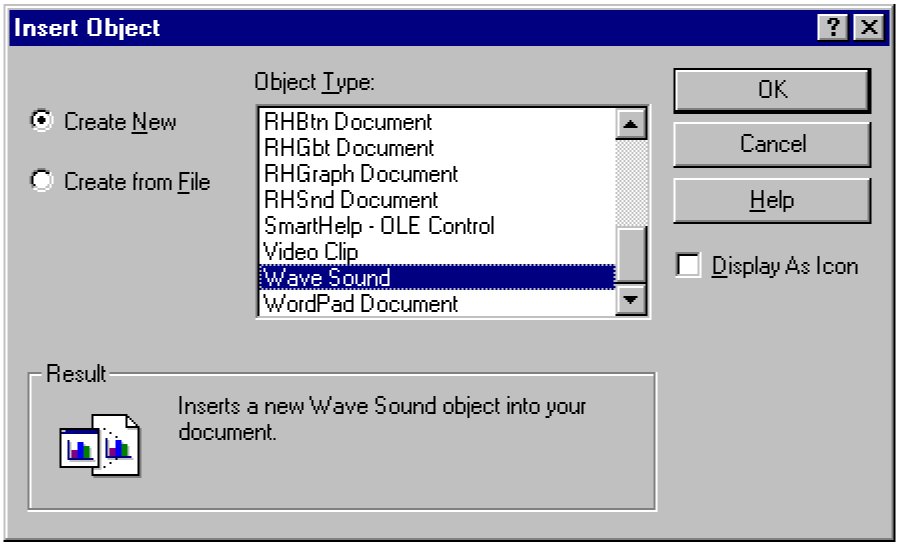


## Sample Filename Displayed in Documents to Fax Field #1

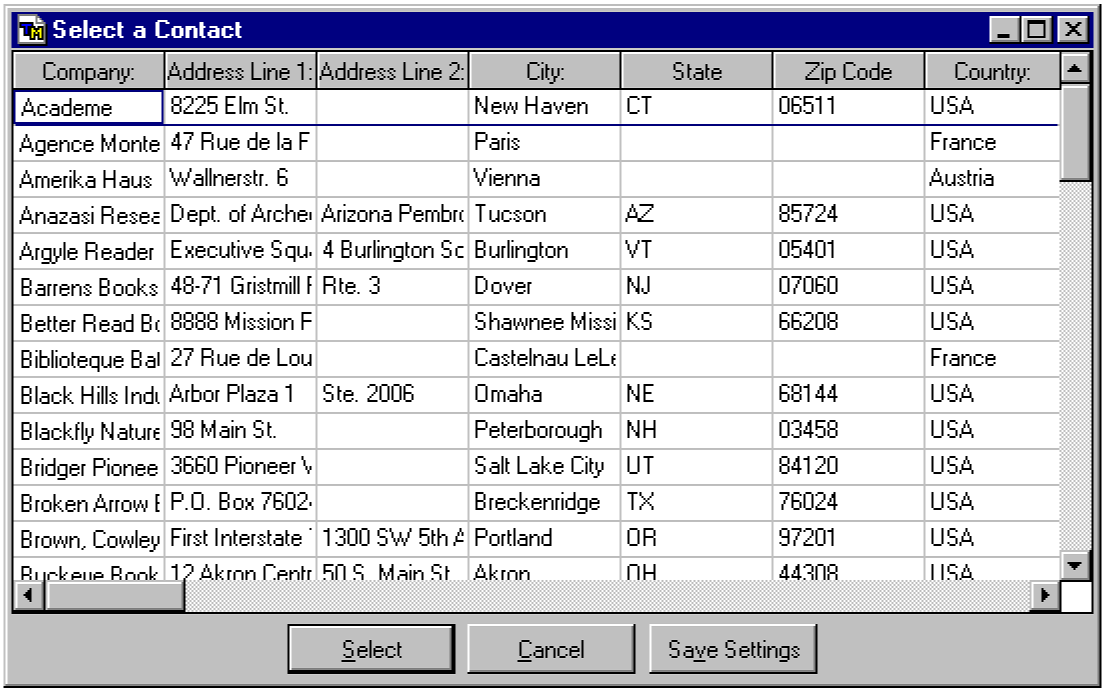
## Sample Import Formats Selection Box



## Sample Insert Object Dialog Box (Sound Object is Selected)

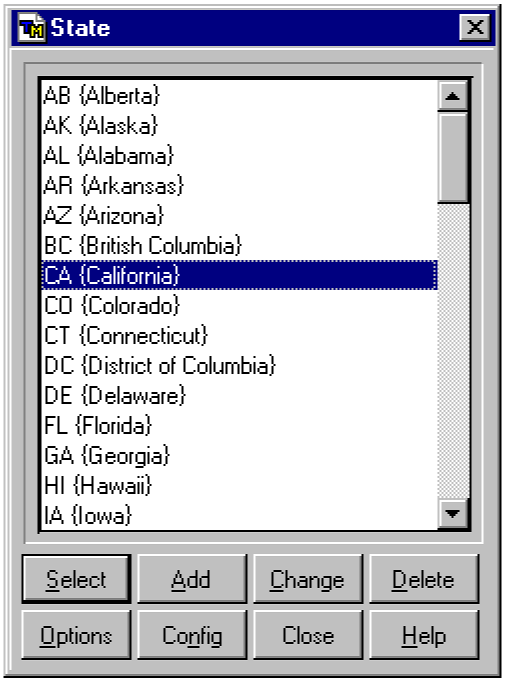


## Sample Link to Contact Browse Window

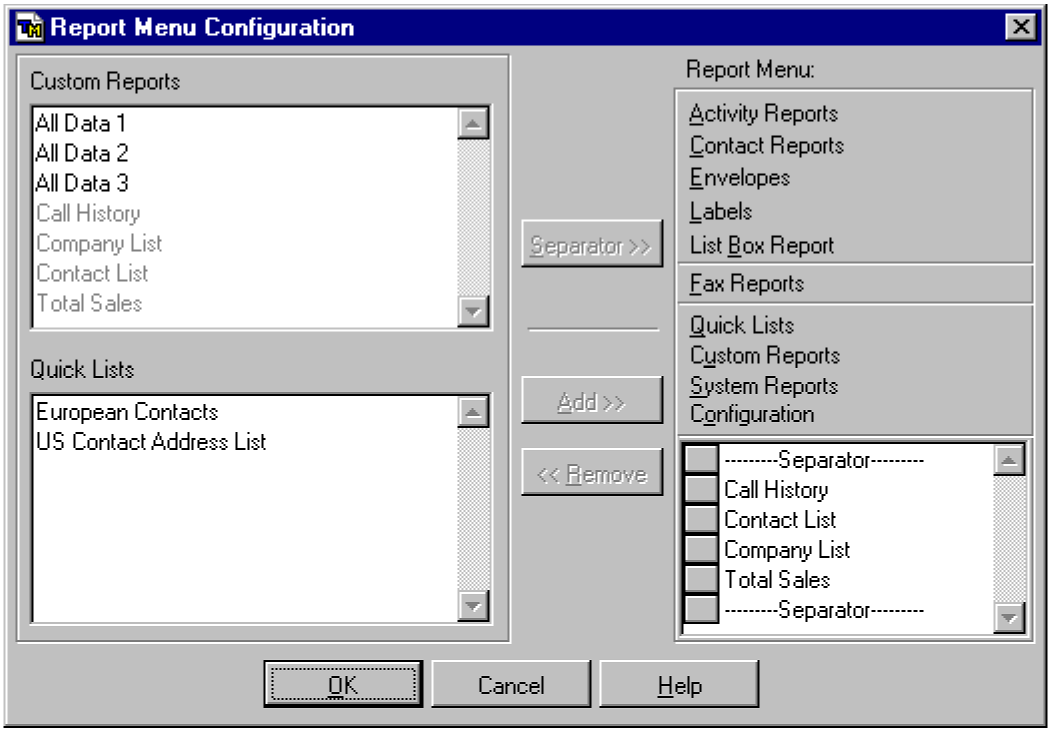



| Company: | Address Line 1: | Address Line 2: | City: | State | Zip Code | Country: |
|---|---|---|---|---|---|---|
| Academe | 8225 Elm St. | | New Haven | CT | 06511 | USA |
| Agence Monte | 47 Rue de la F | | Paris | | | France |
| Amerika Haus | Wallnerstr. 6 | | Vienna | | | Austria |
| Anazasi Resea | Dept. of Arche | Arizona Pembr | Tucson | AZ | 85724 | USA |
| Argyle Reader | Executive Squ | 4 Burlington Sc | Burlington | VT | 05401 | USA |
| Barrens Books | 48-71 Gristmill I | Rte. 3 | Dover | NJ | 07060 | USA |
| Better Read B | 8888 Mission F | | Shawnee Missi | KS | 66208 | USA |
| Biblioteque Bal | 27 Rue de Lou | | Castelnau LeL | | | France |
| Black Hills Indu | Arbor Plaza 1 | Ste. 2006 | Omaha | NE | 68144 | USA |
| Blackfly Nature | 98 Main St. | | Peterborough | NH | 03458 | USA |
| Bridger Pionee | 3660 Pioneer V | | Salt Lake City | UT | 84120 | USA |
| Broken Arrow I | P.O. Box 7602 | | Breckenridge | TX | 76024 | USA |
| Brown, Cowley | First Interstate | 1300 SW 5th A | Portland | OR | 97201 | USA |
| Buckeye Book | 12 Akron Centr | 50 S. Main St. | Akron | OH | 44308 | USA |

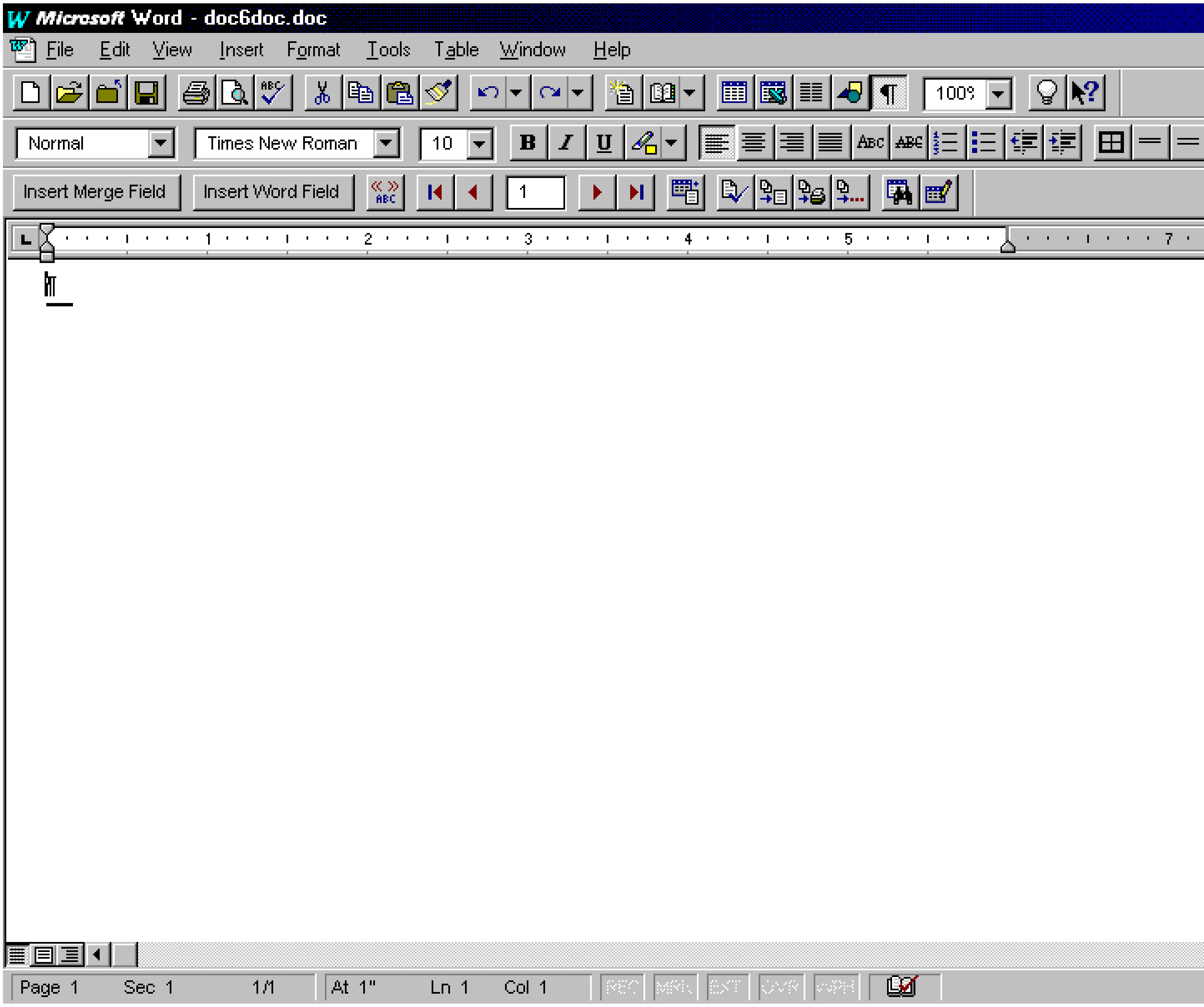
### Sample List Box



## Sample Report Menu Configuration Dialog Box



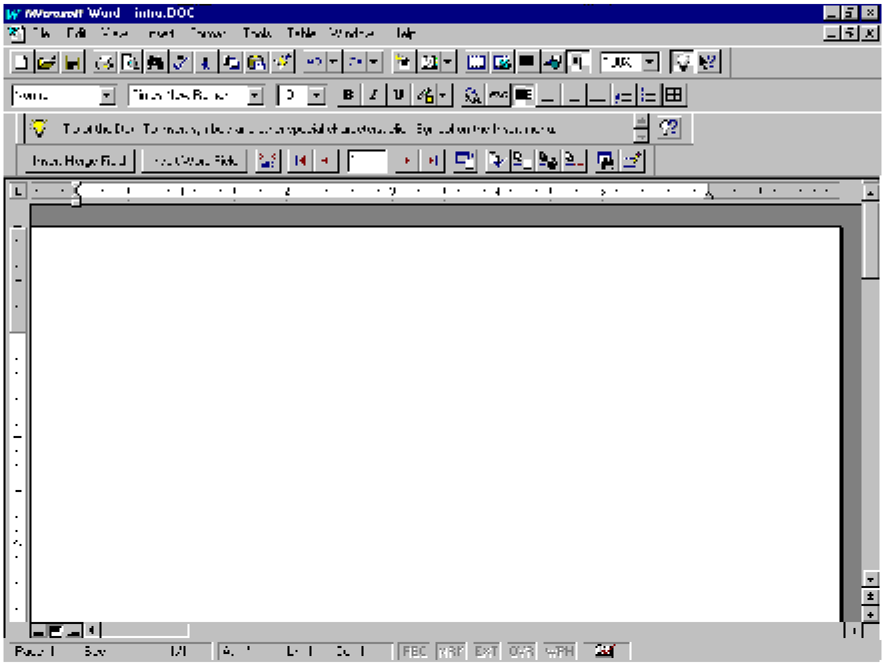
## Sample Microsoft Word 6.0 Screen



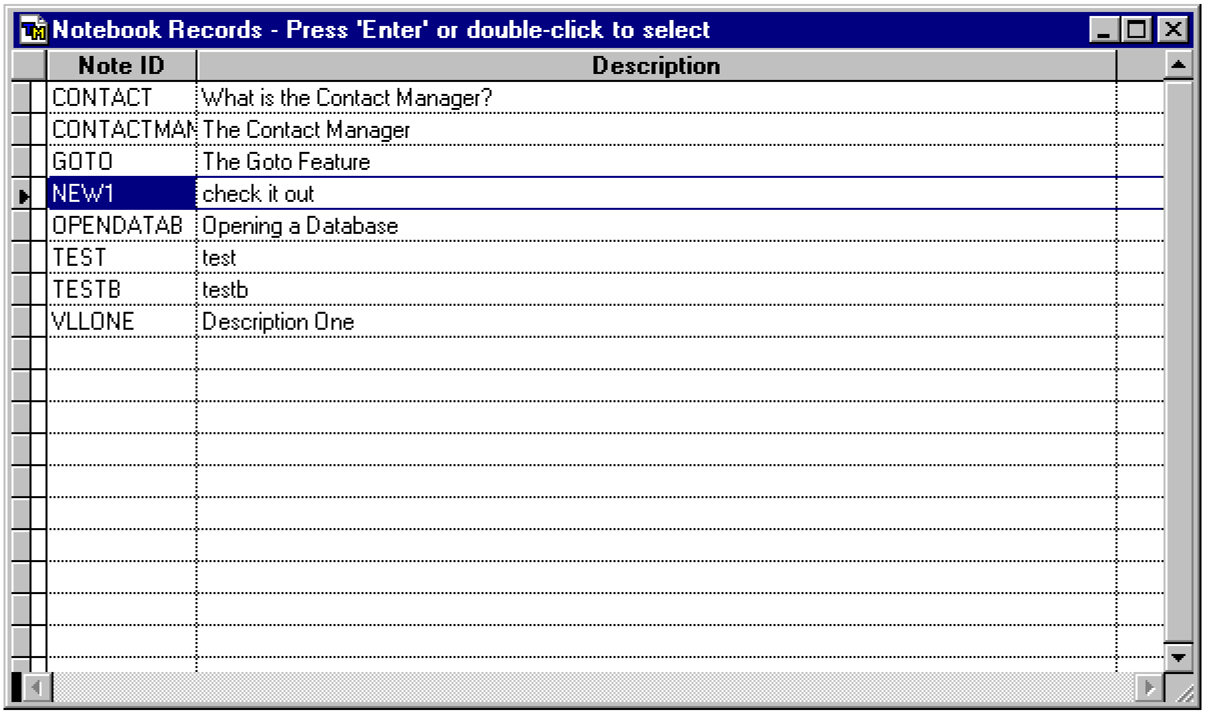

**Note**

The Microsoft Word toolbar is configurable. Your toolbar may be different. Microsoft Word 7 screen shown, Word 6.0 is similar.

## Sample Microsoft Word 7.0 Screen

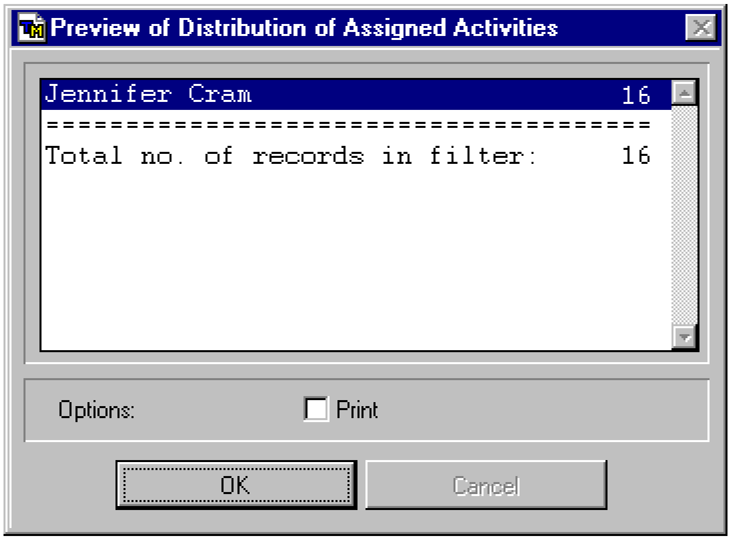


## Sample Notebook Browse Window

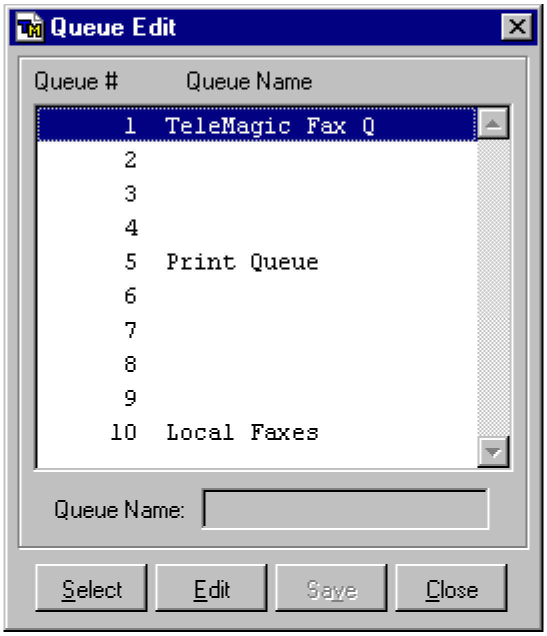


## Sample Page Order Dialog Box

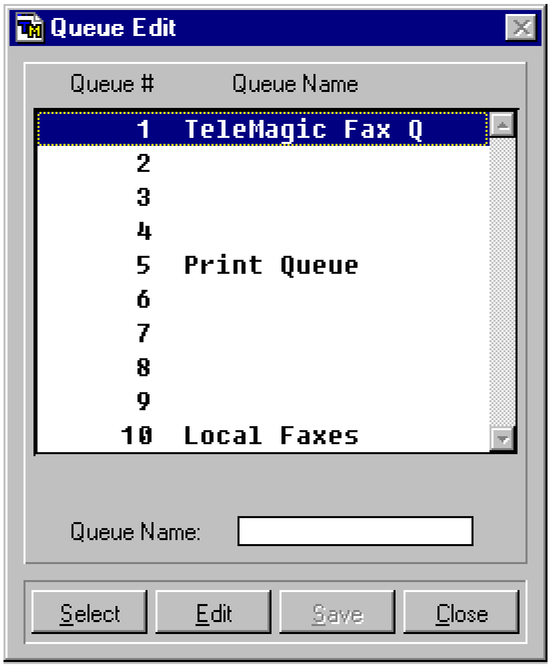
### Sample Preview of Distribution of Assigned Activities Dialog Box



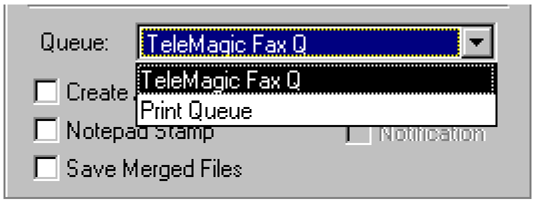
## Queue Edit Dialog Box



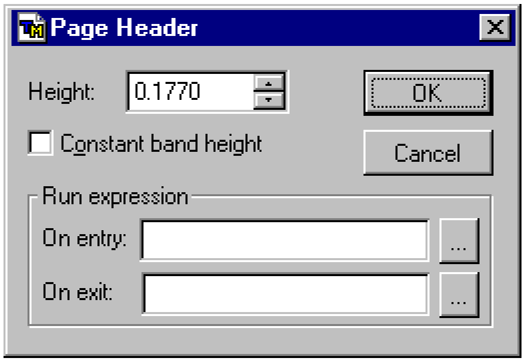
## Sample Queue Edit Dialog Box



## Sample Queue List

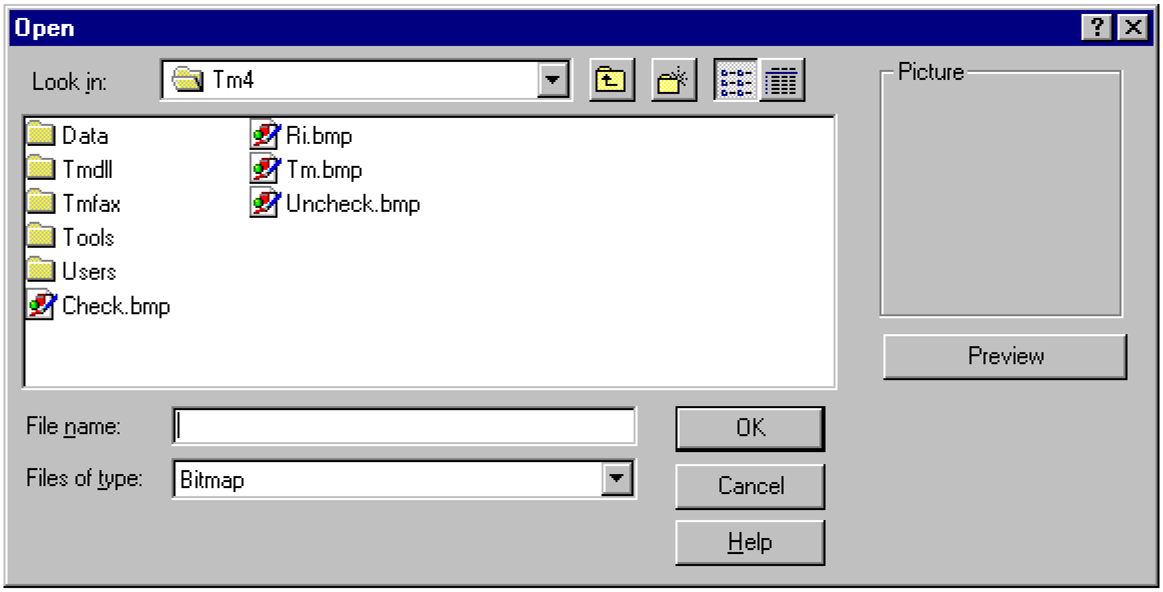


## Sample Report Band Dialog Box

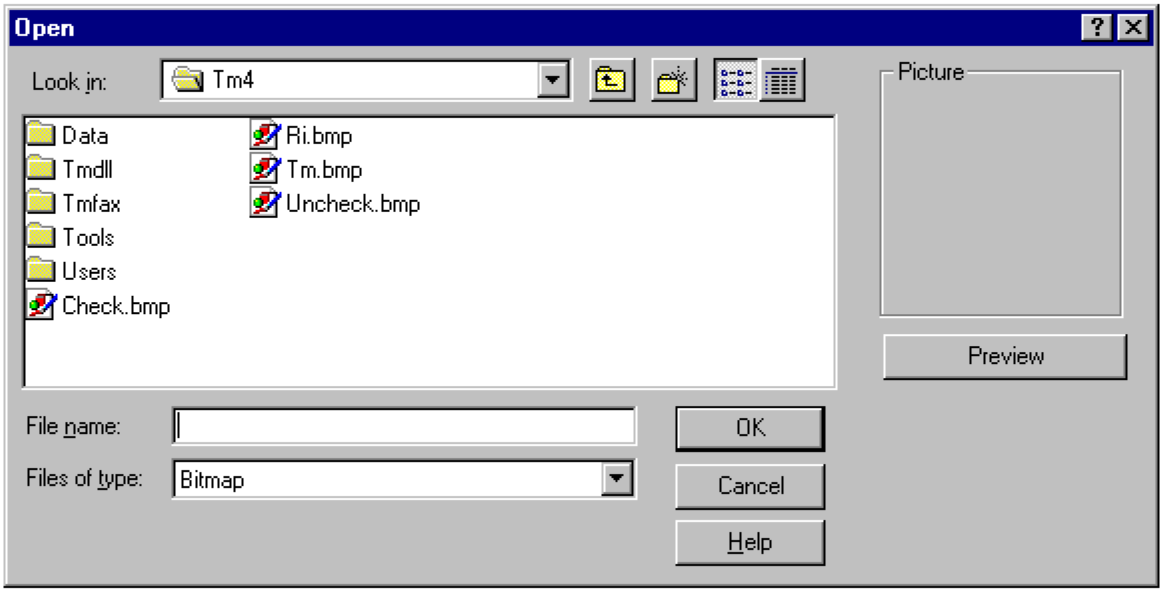



(The name of the band being edited will appear in the title bar.)

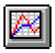
## Sample Report Generator Picture Dialog Box



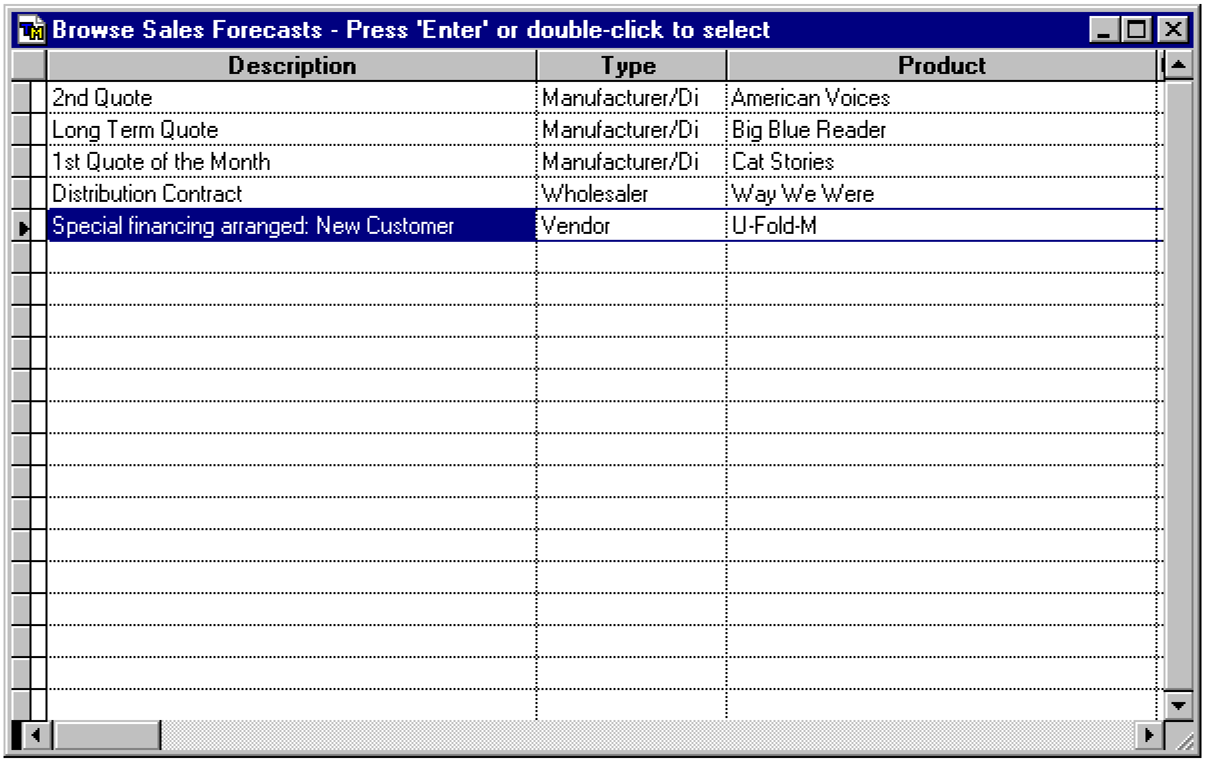
## Sample Report Picture Dialog Box



## Sales Forecasting Toolbar Icon

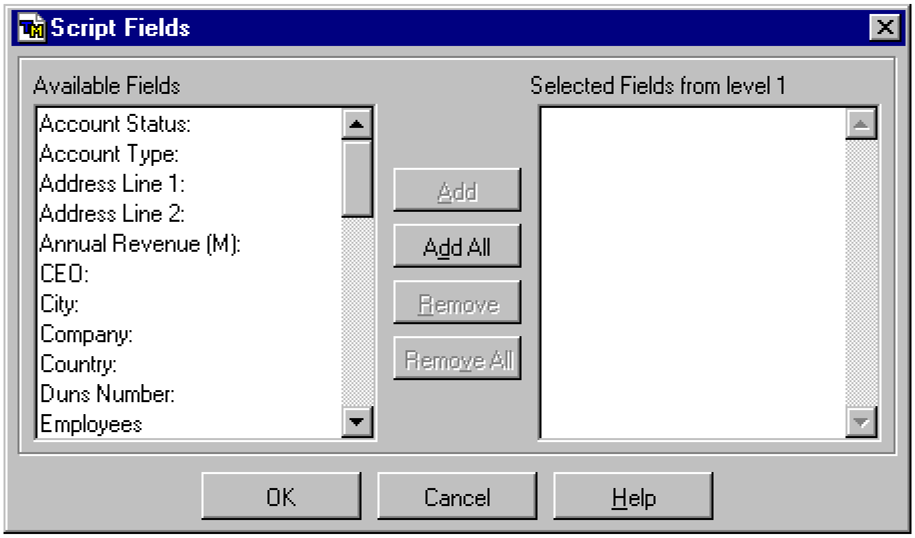


## Sample Sales Forecasting Browse Window



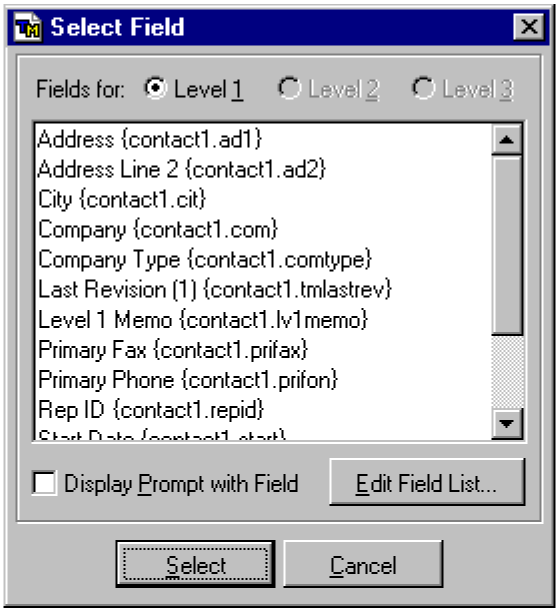

Because this screen can be edited, your field order may be different

## Sample Script Fields Dialog Box

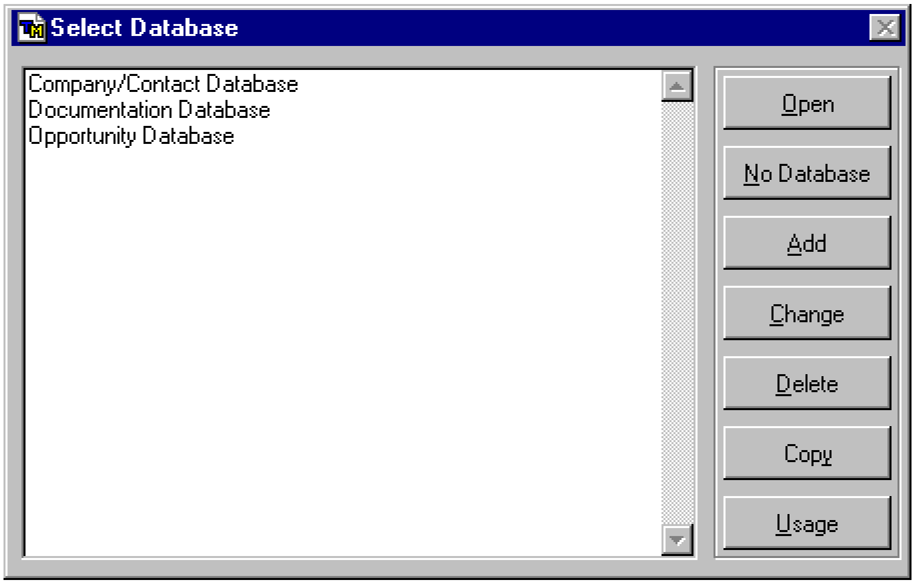



(Your list of fields may be different from this example.)

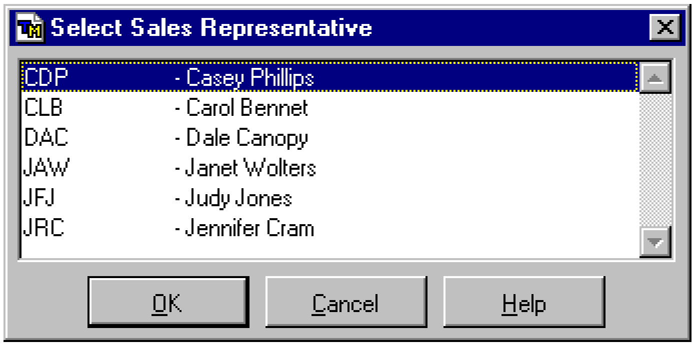
## Sample Select a Field Dialog Box



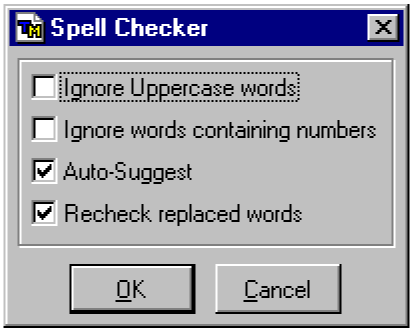
## Sample Select Database Selection Box



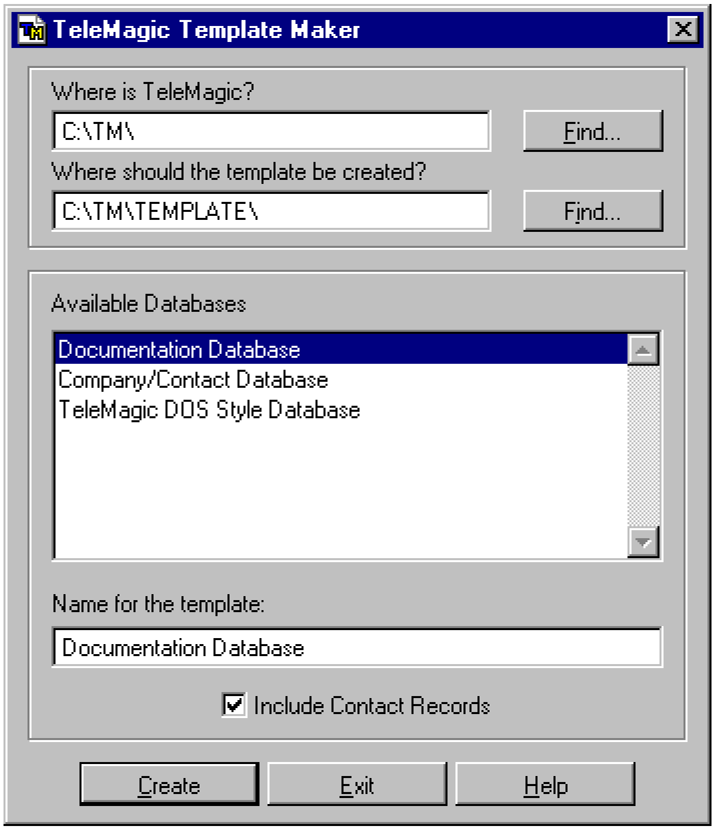
## Sample Select Sales Representative Dialog Box



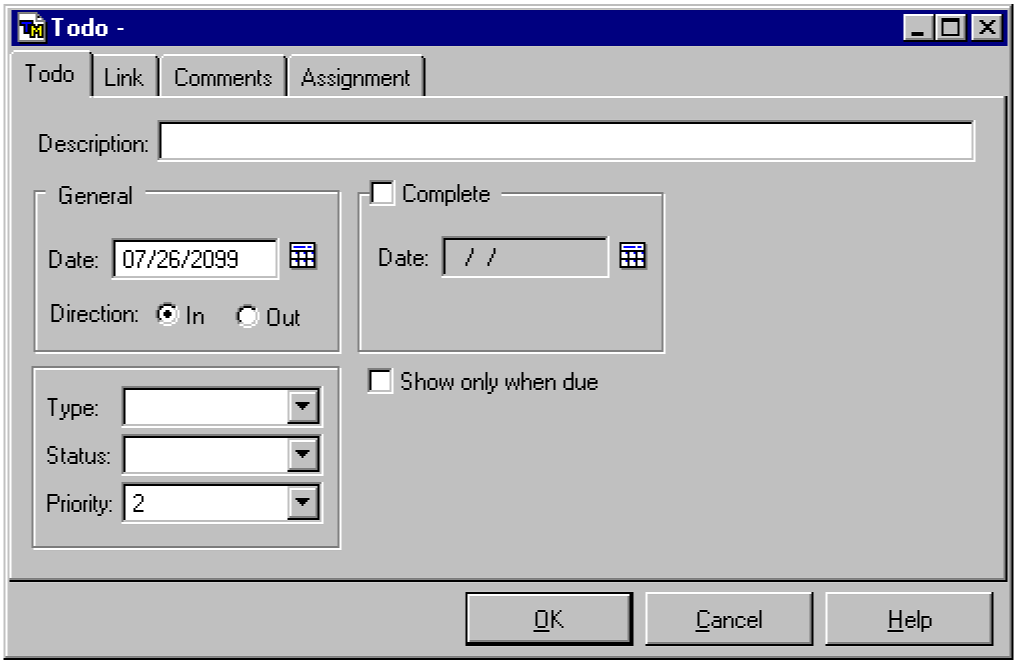
## Sample Spell Checker Options Dialog Box



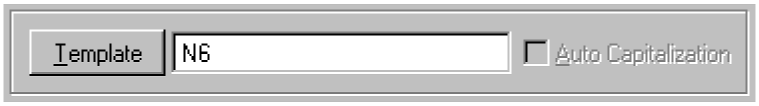
## Sample Template Maker Dialog Box



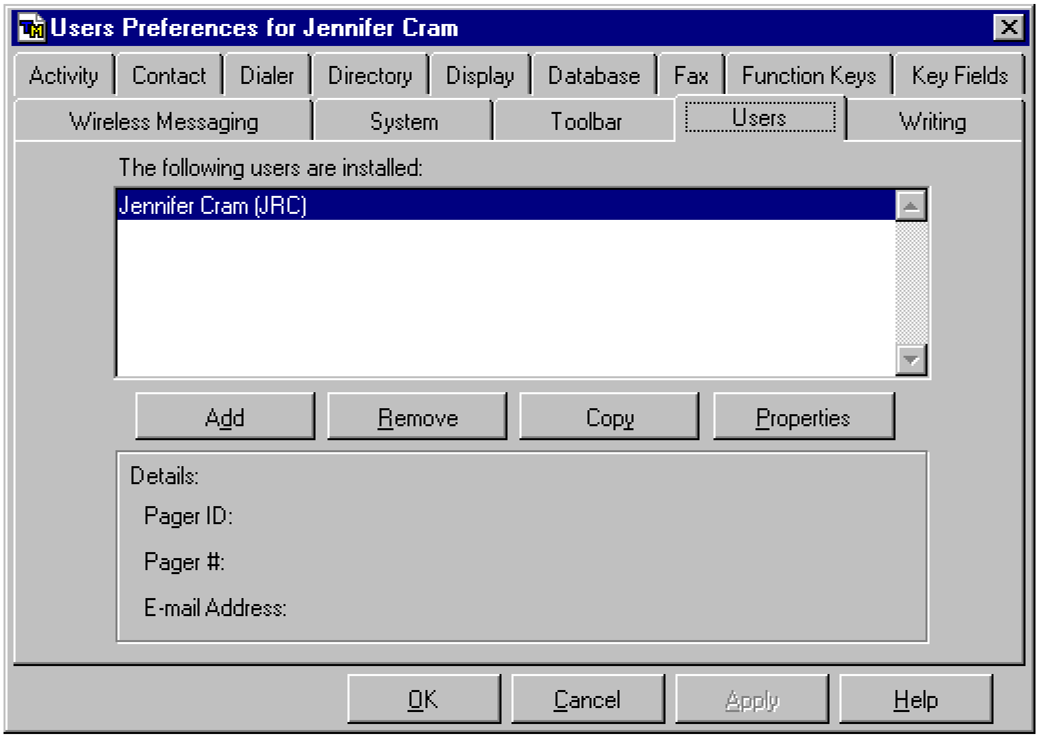
## Sample To-Do Dialog Box



## Sample Unique Number (Contract Number) Template

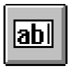


## Sample Users Preferences Dialog Box

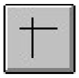


## Scroll Bar

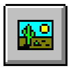
## Screen Designer Field Tool



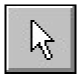
## Screen Designer Line Tool



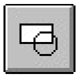
## Screen Designer Picture Tool



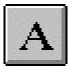
## Screen Designer Pointer Tool



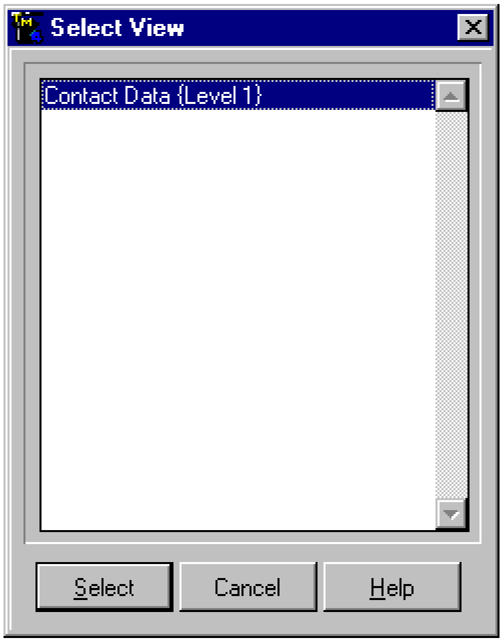
## Screen Designer Rectangle/Circle Tool



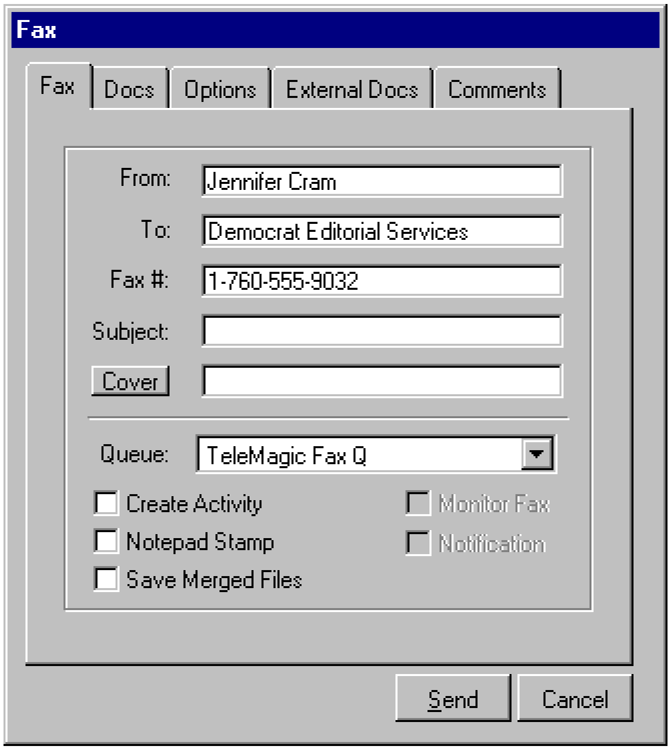
## Screen Designer Text Tool



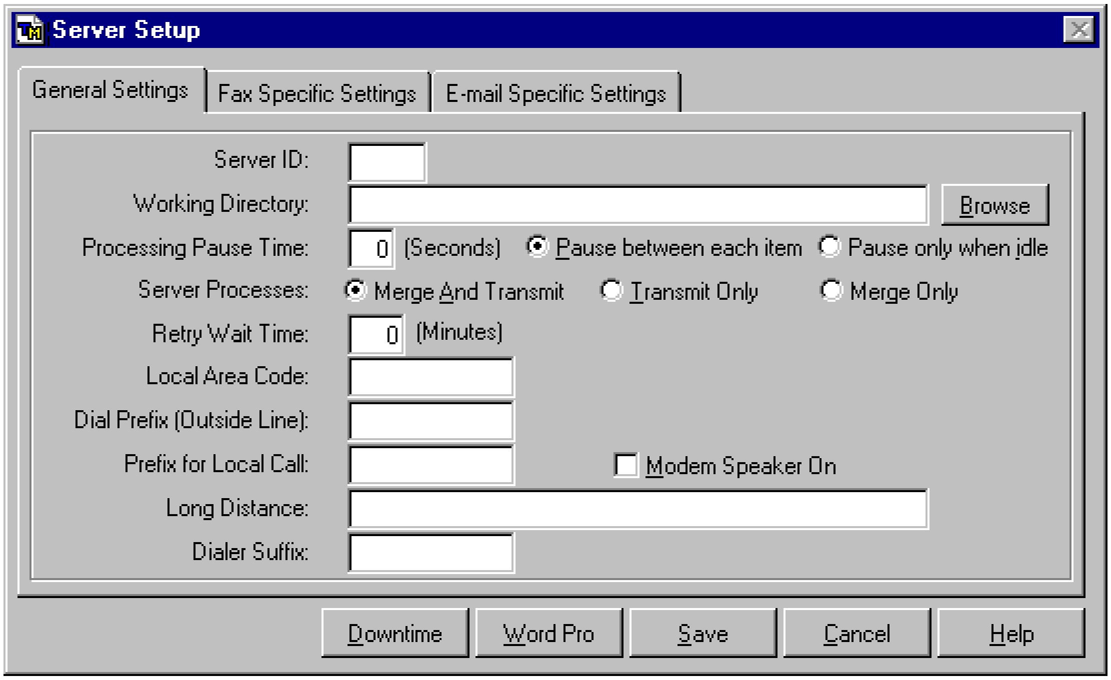
## Select View Dialog Box



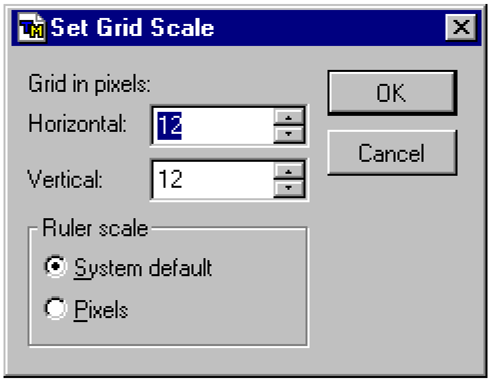
## Send Fax Dialog Box



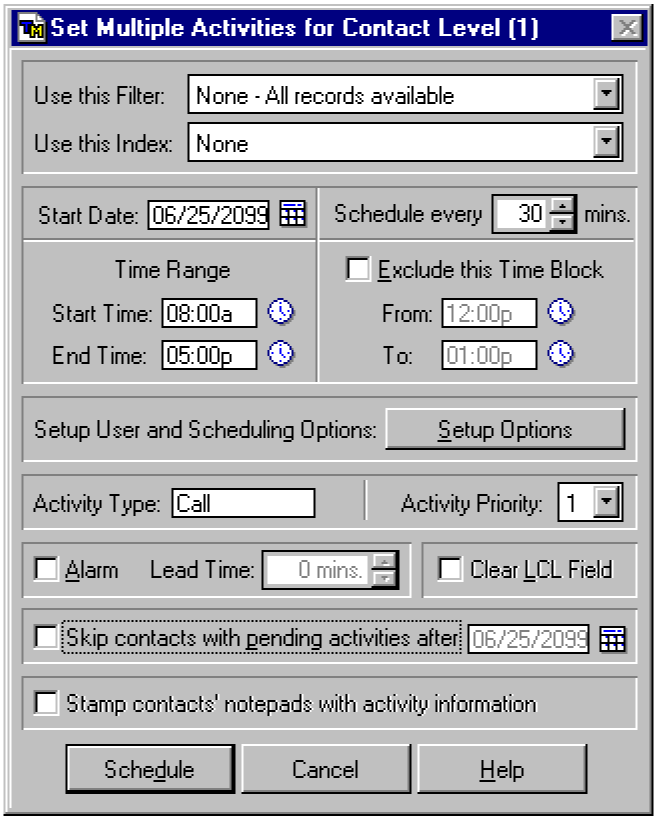
## Server Setup: Adding a Server



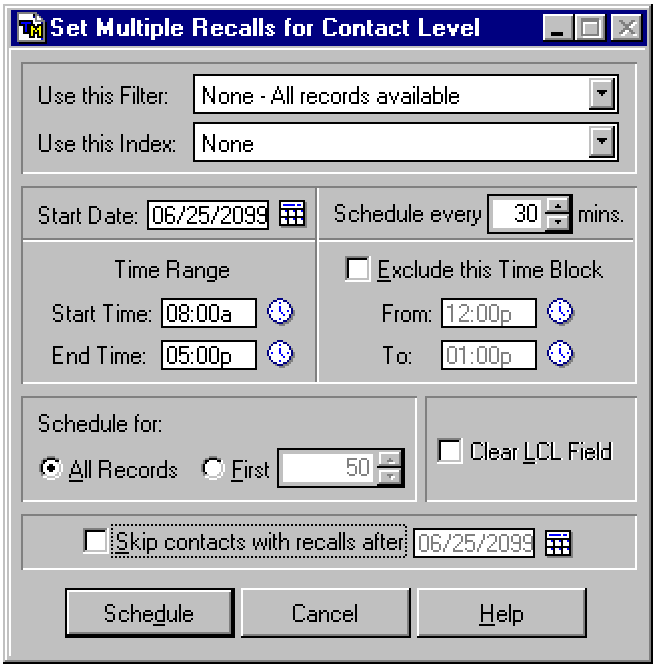
## Set Grid Scale Dialog Box



## Set Multiple Activities Dialog Box



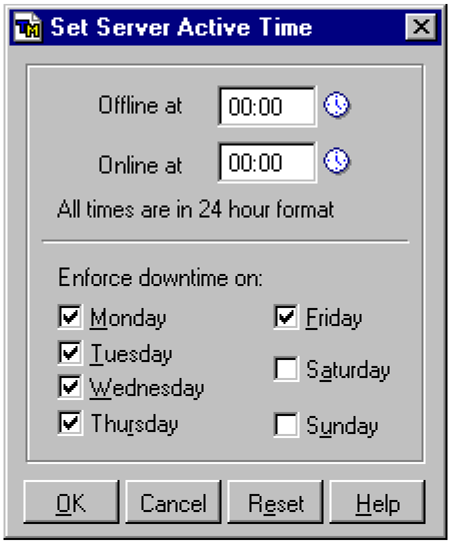
## Set Multiple Recalls Dialog Box



## Set Recall Toolbar Icon

-

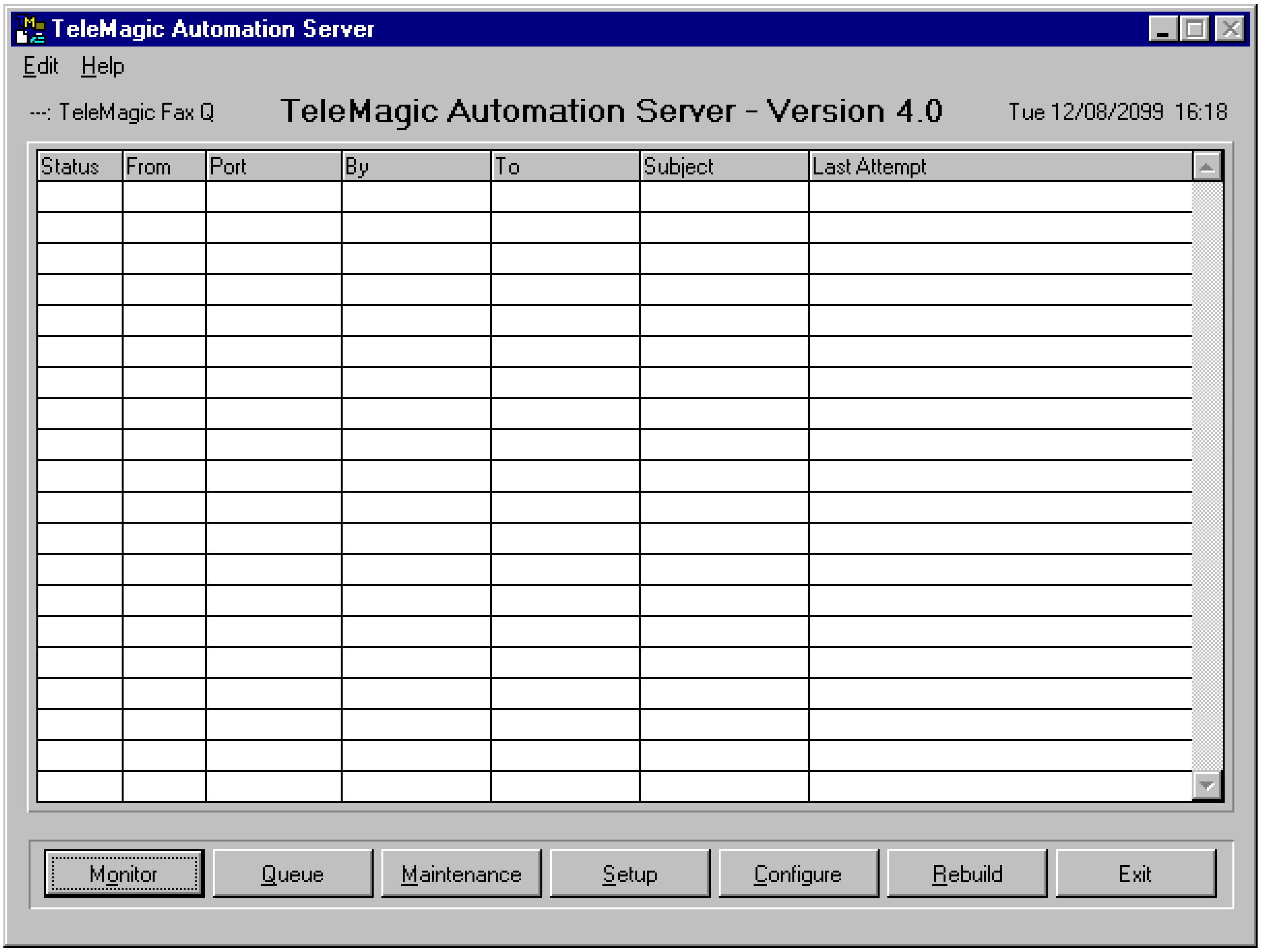
## Set Server Active Time Dialog Box



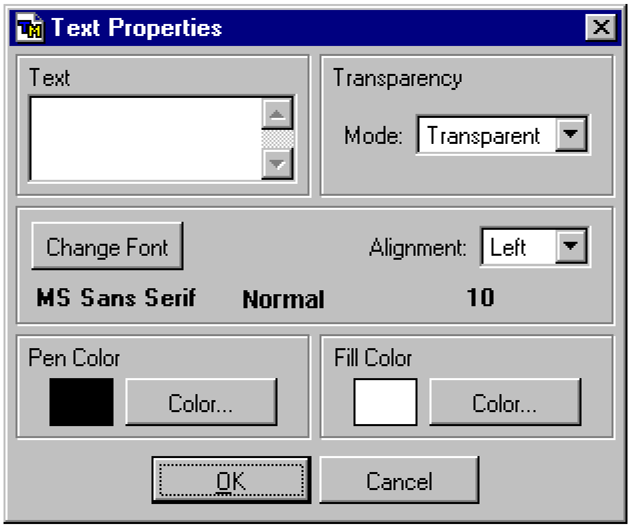
# Spell Checker Toolbar Icon

## Spinner Arrows

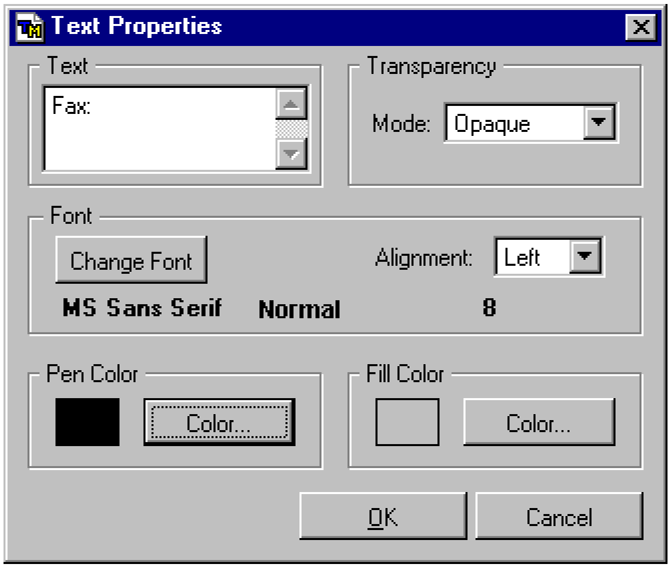
## TeleMagic Automation Server Screen



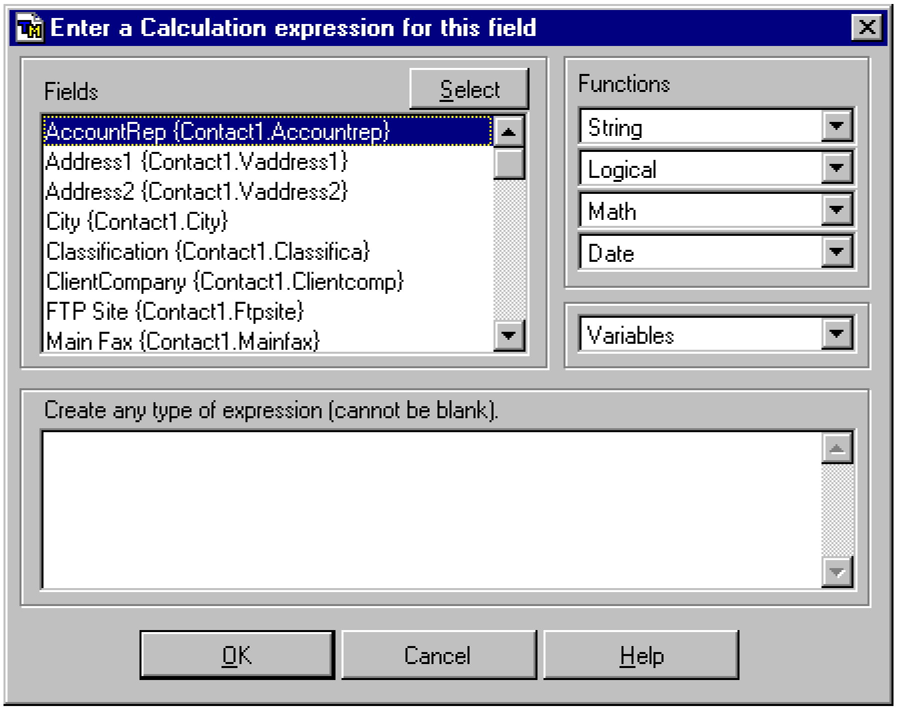
## Text Contents Dialog Box



## Text Properties Dialog Box



## The Expression Builder Dialog Box

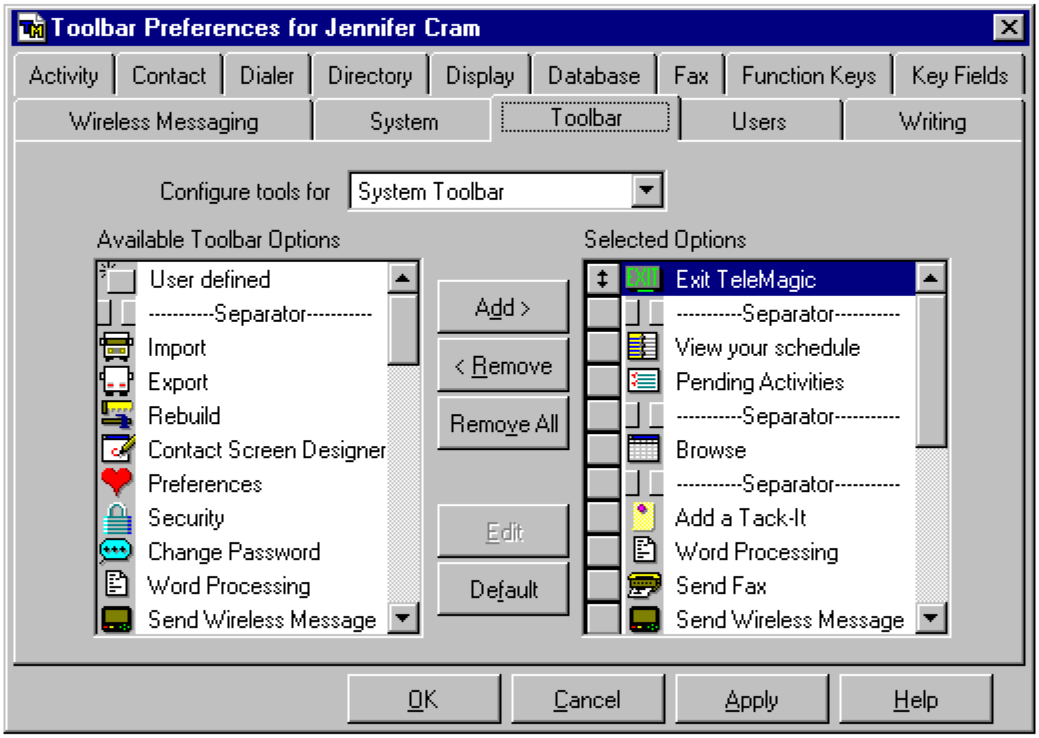


## Time Picker Icon

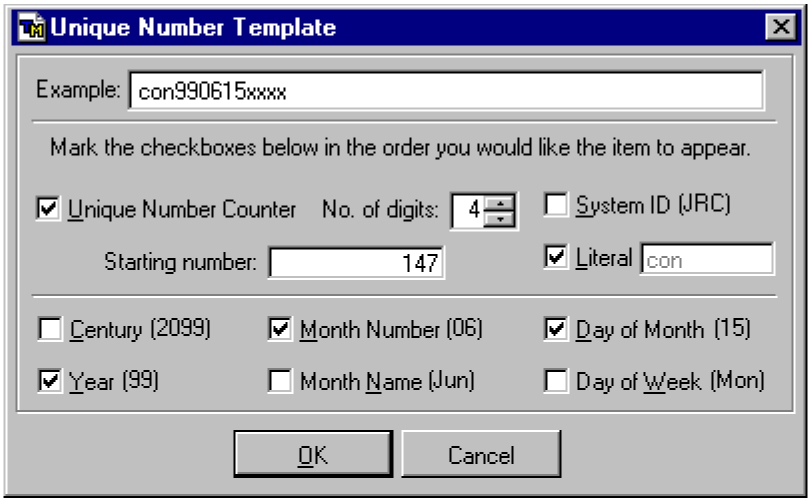
-

## Title/Summary Dialog Box

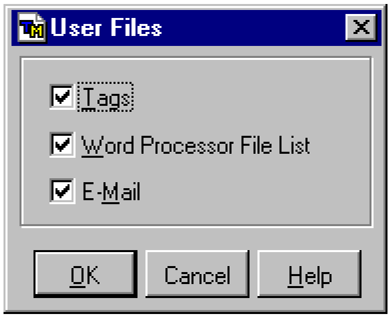
## Toolbar Configuration Screen



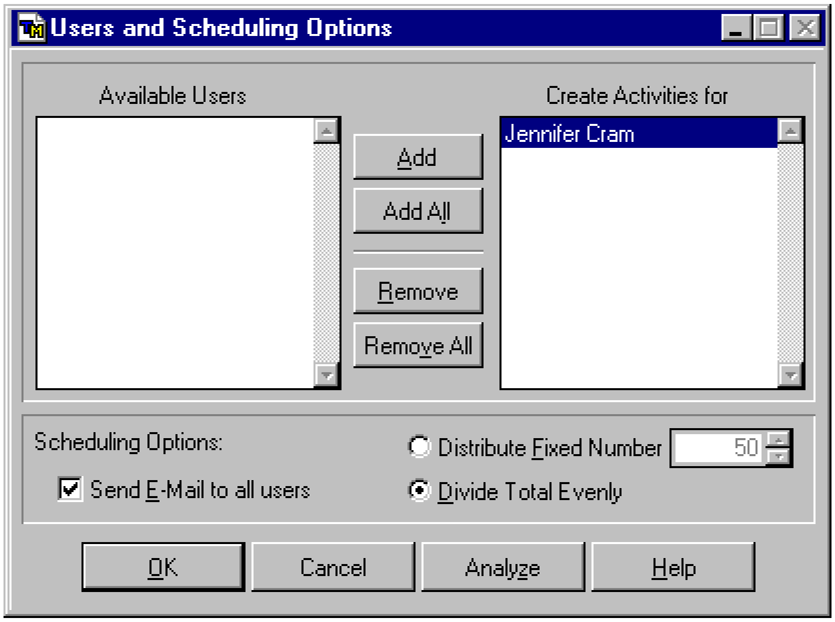
## Unique Number Template Dialog Box



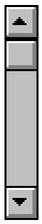
## User Files Dialog Box



## Users and Scheduling Options Dialog Box



## Vertical Scroll Bar

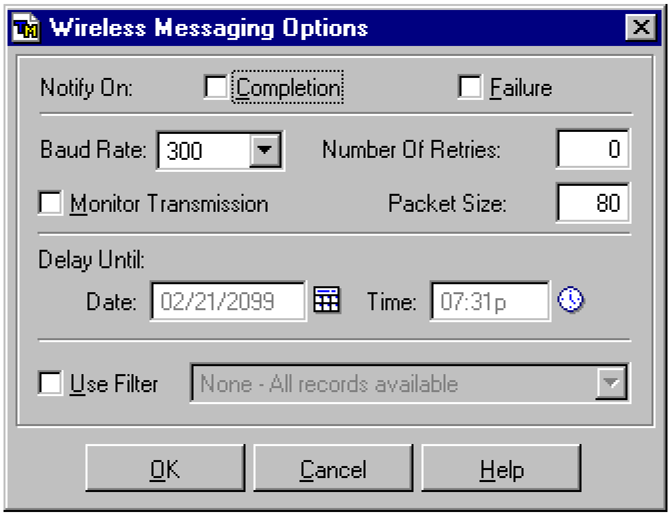


## Windows Font Dialog Box

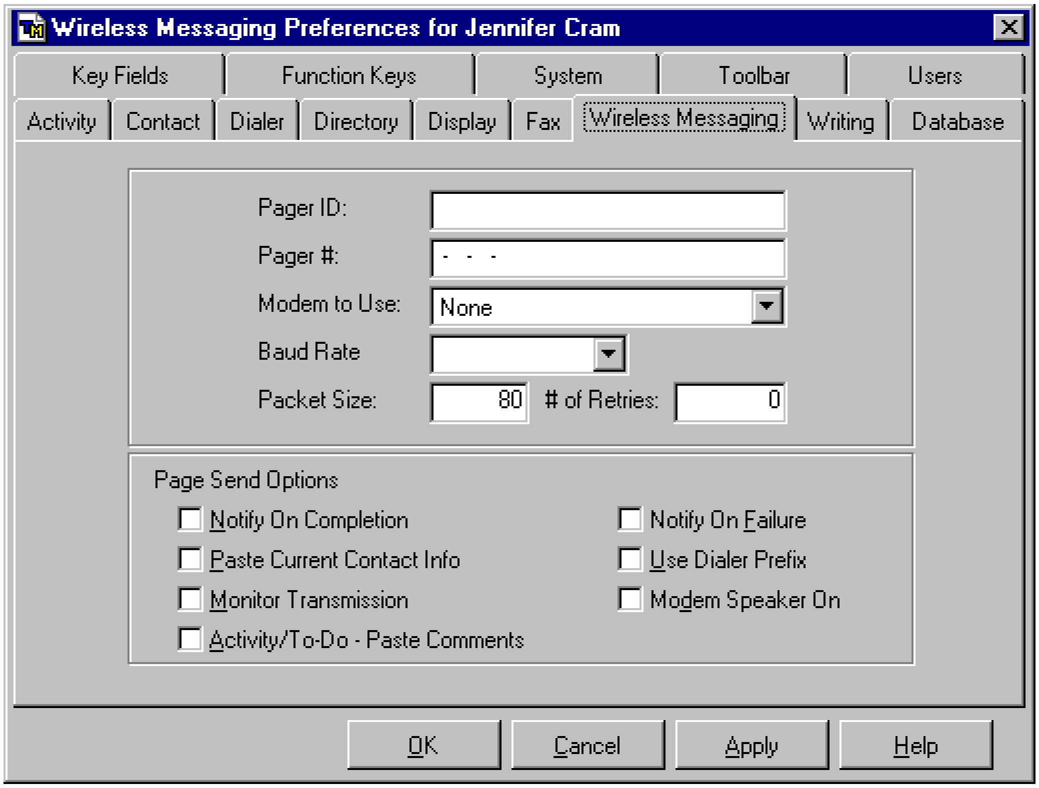
•

## Windows Write Icon

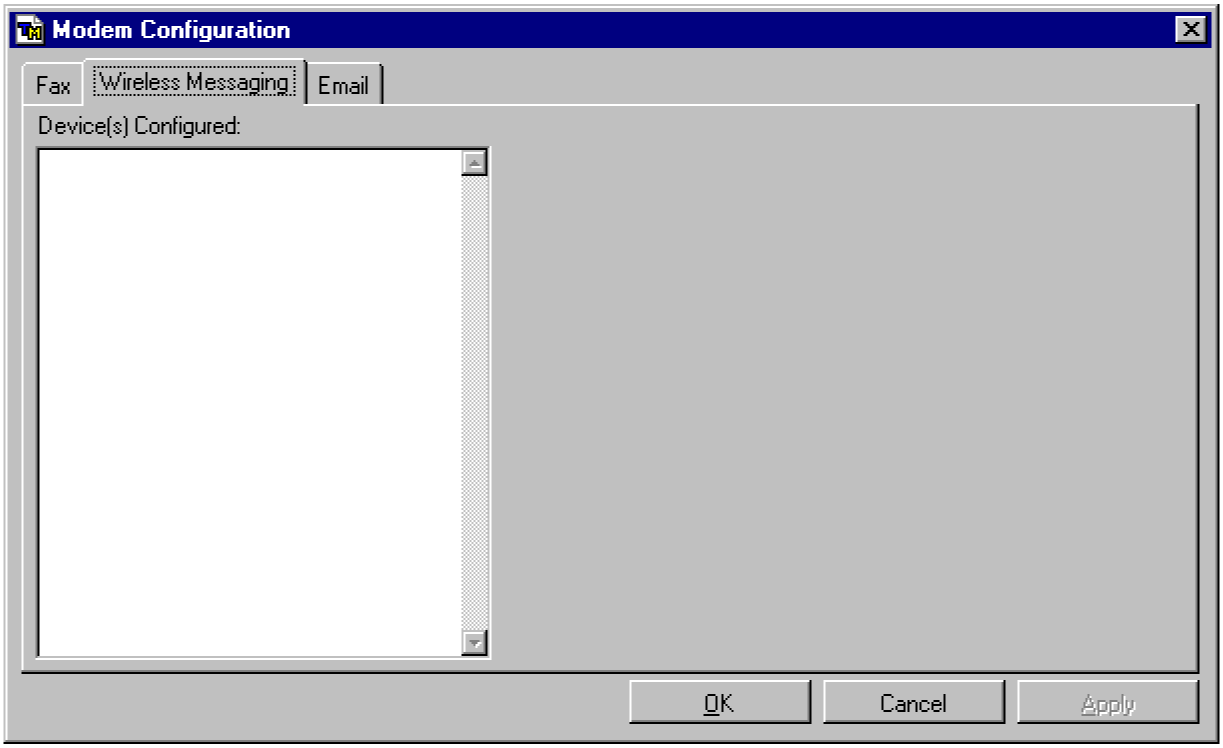
## Wireless Messaging Options Dialog Box



## Wireless Messaging Preferences Screen

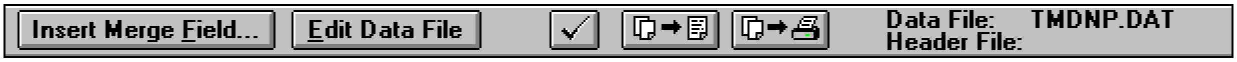


## Wireless Messaging Setup Dialog Box



## Wireless Messaging Toolbar Icon

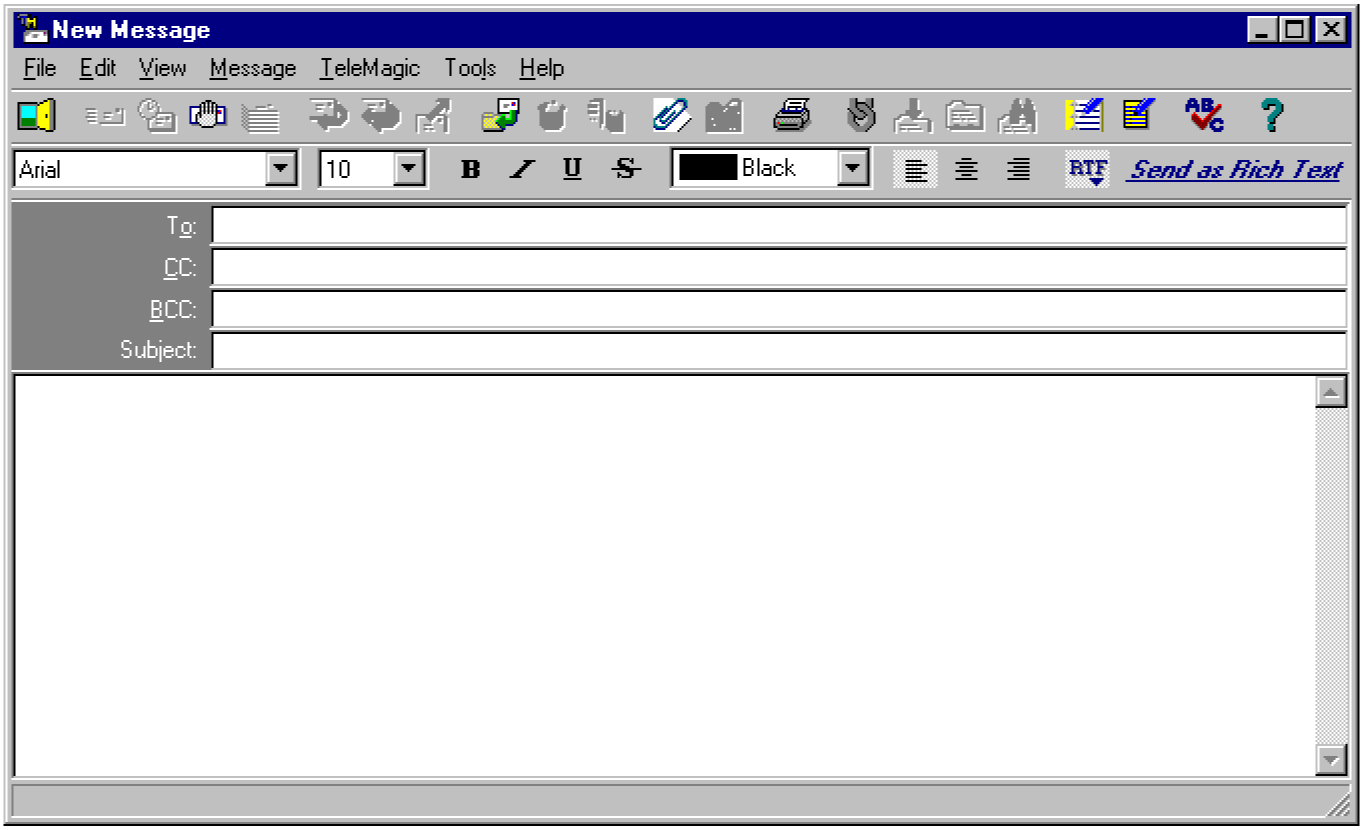
## Word for Windows 2.0 Sample Toolbar



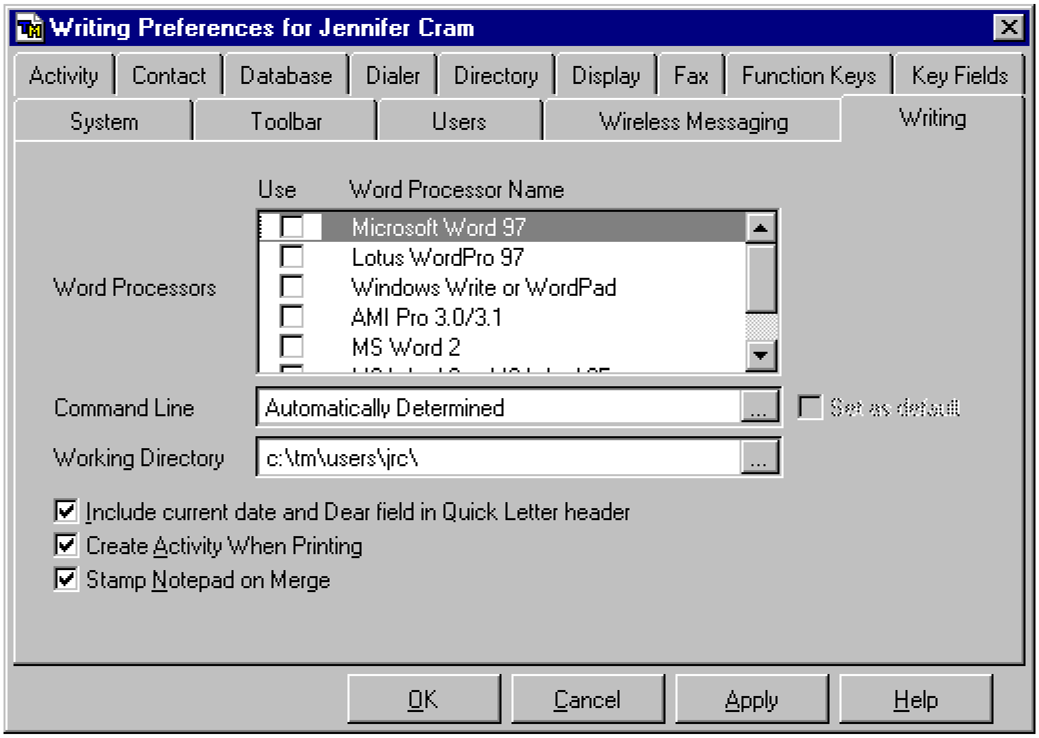
## Word Processor Documents Selection Box

-

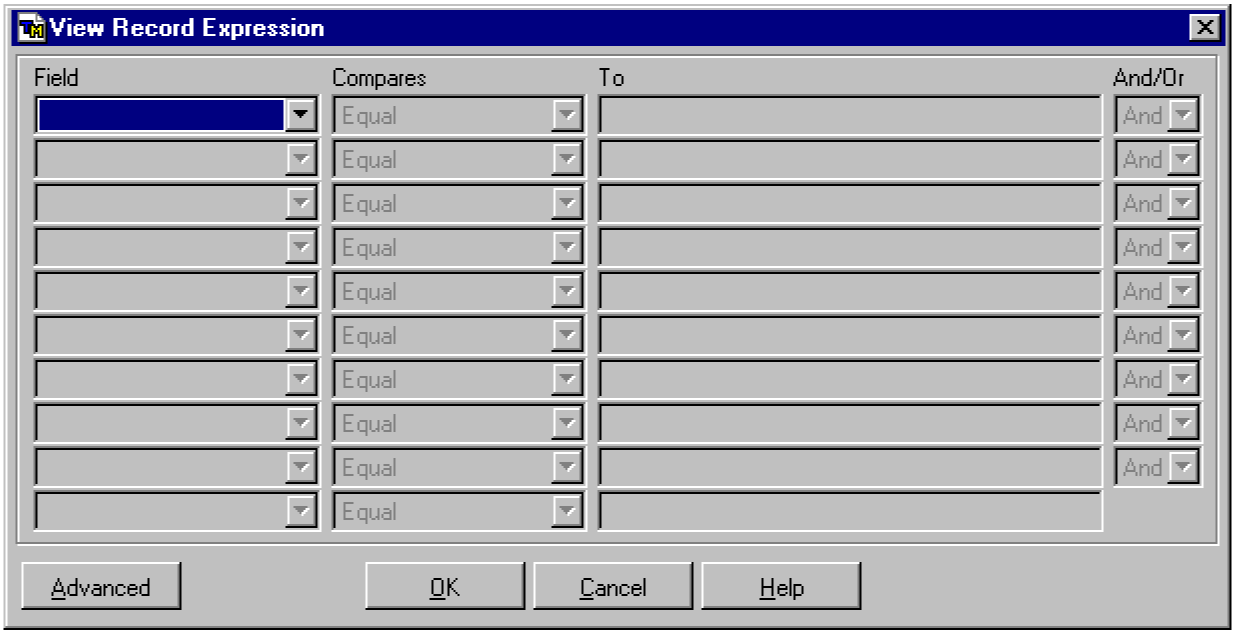
## Write Mail Dialog Box



## Writing Preferences Screen

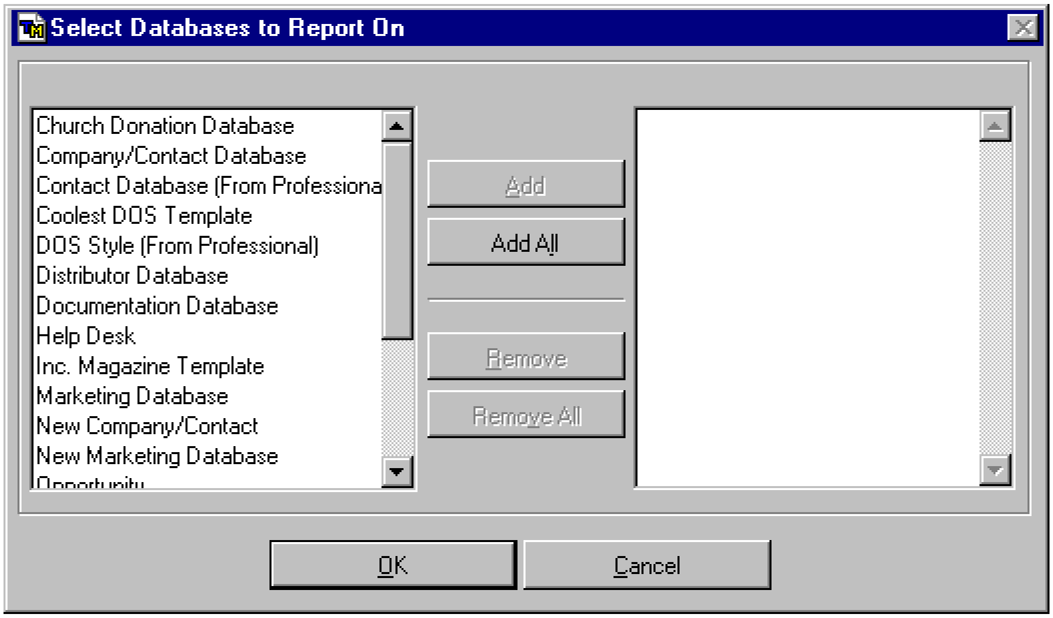


## Record Expression Dialog Box

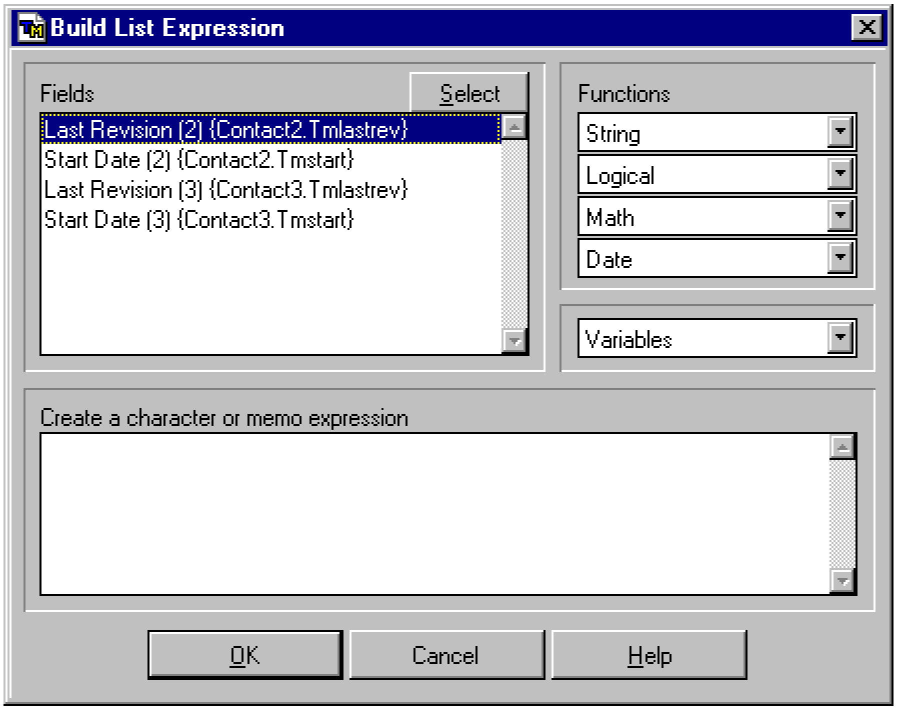


## Change Password (Supervisor)

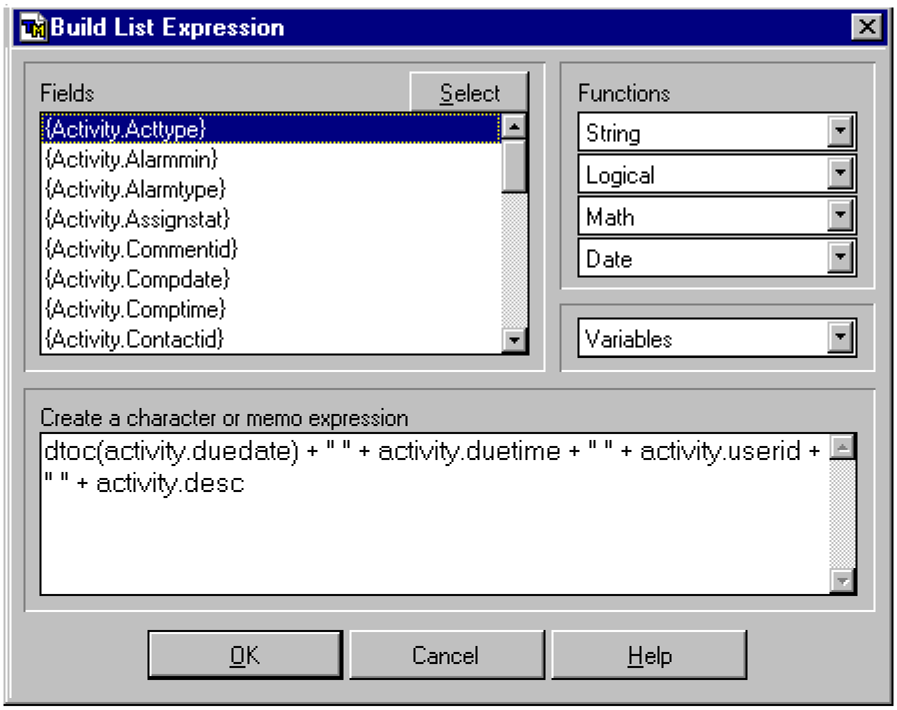
## Select Databases to Report on Dialog Box



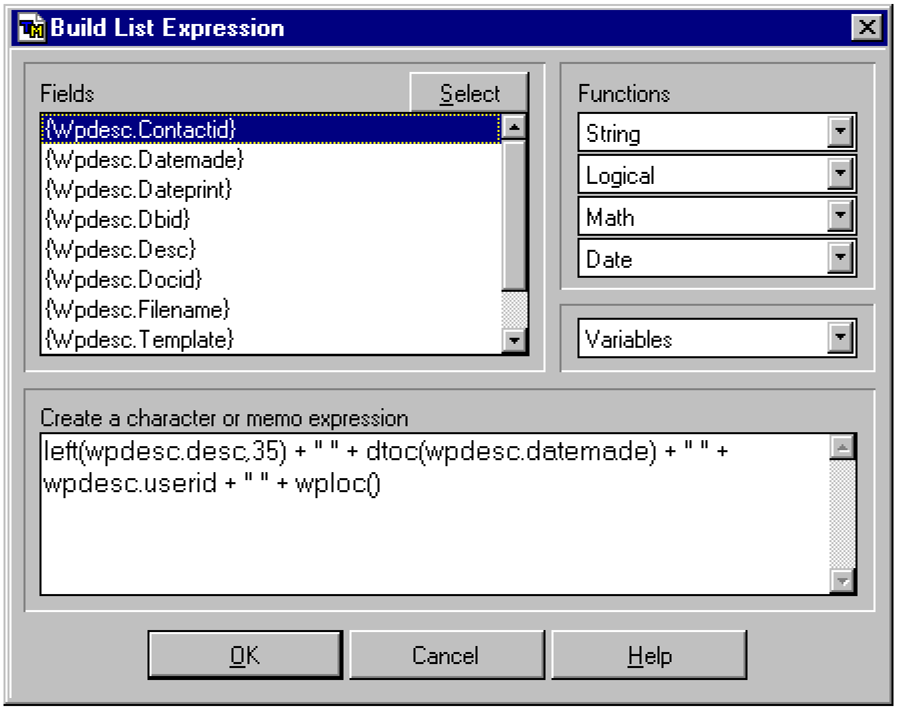
## Expression Builder (Contact Rollup)



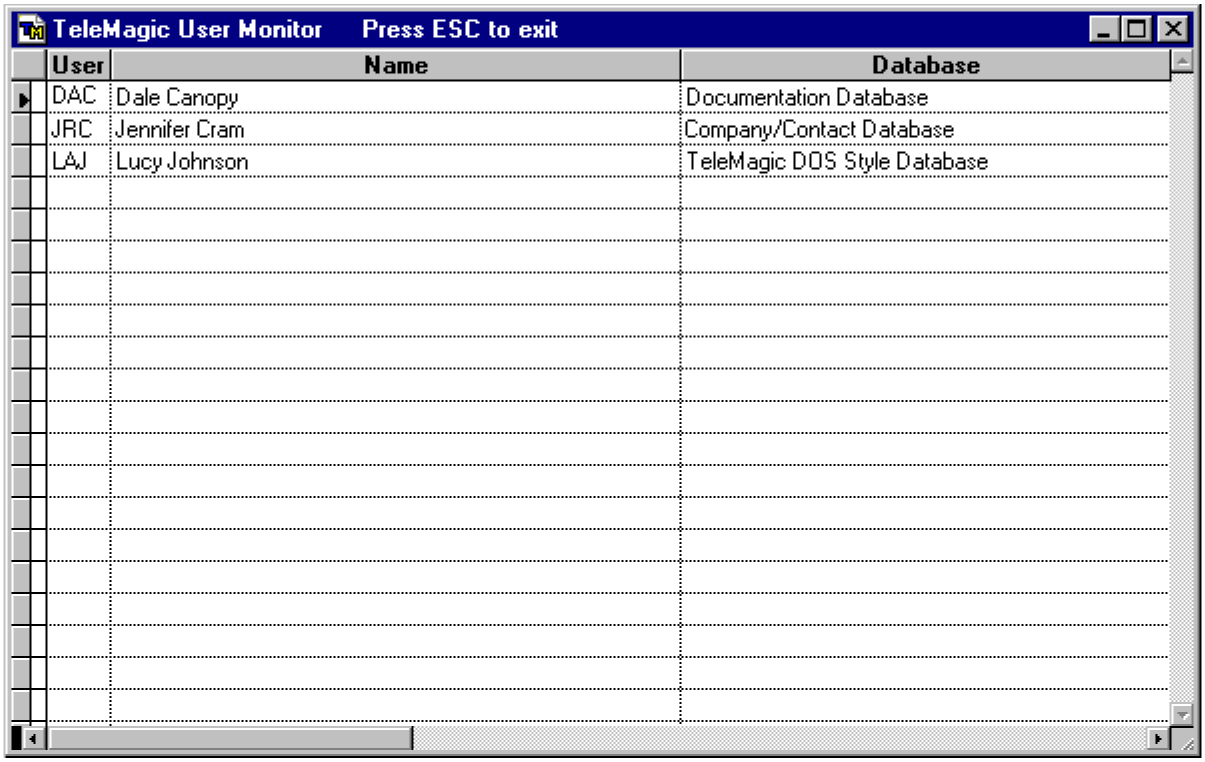
# Expression Builder (Activity Rollup)



## Expression Builder (Document Rollup)

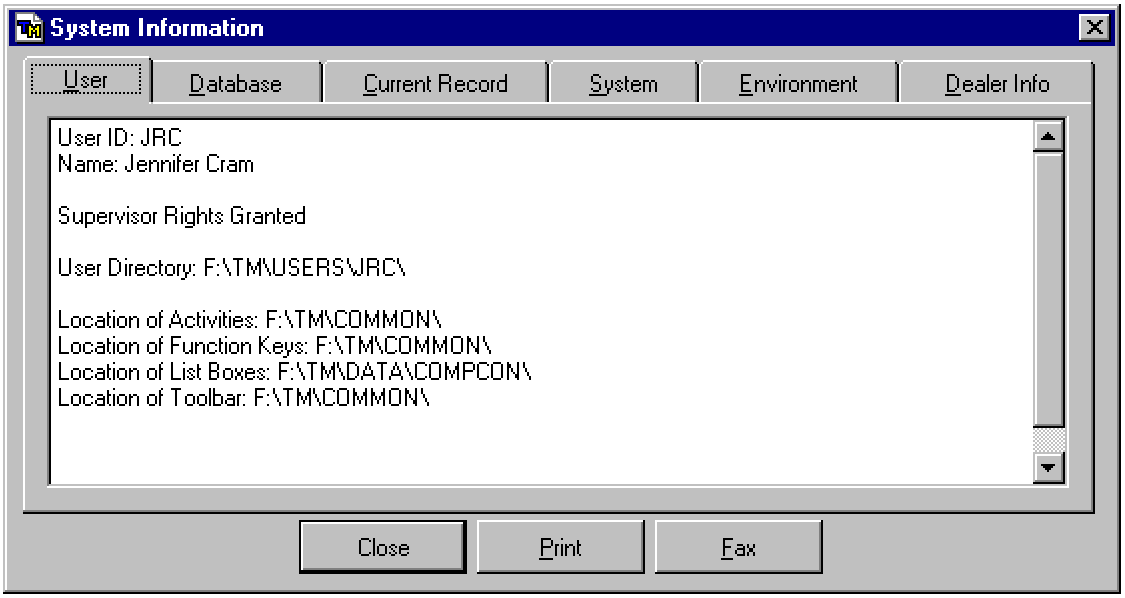


## User Monitor

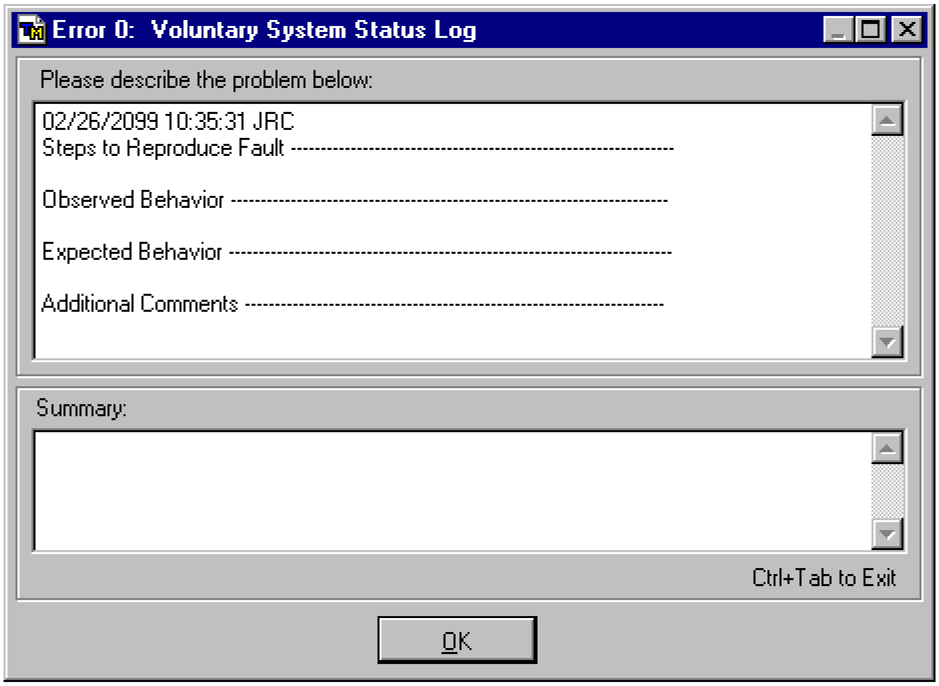


## About Screen

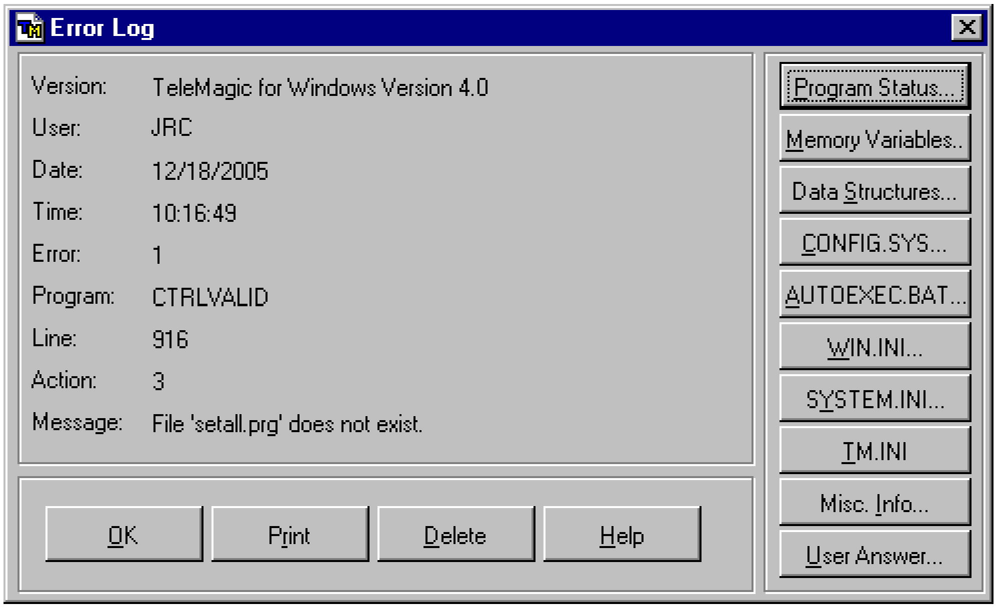
## Sample System Information Screen



## Log the System Status Dialog Box

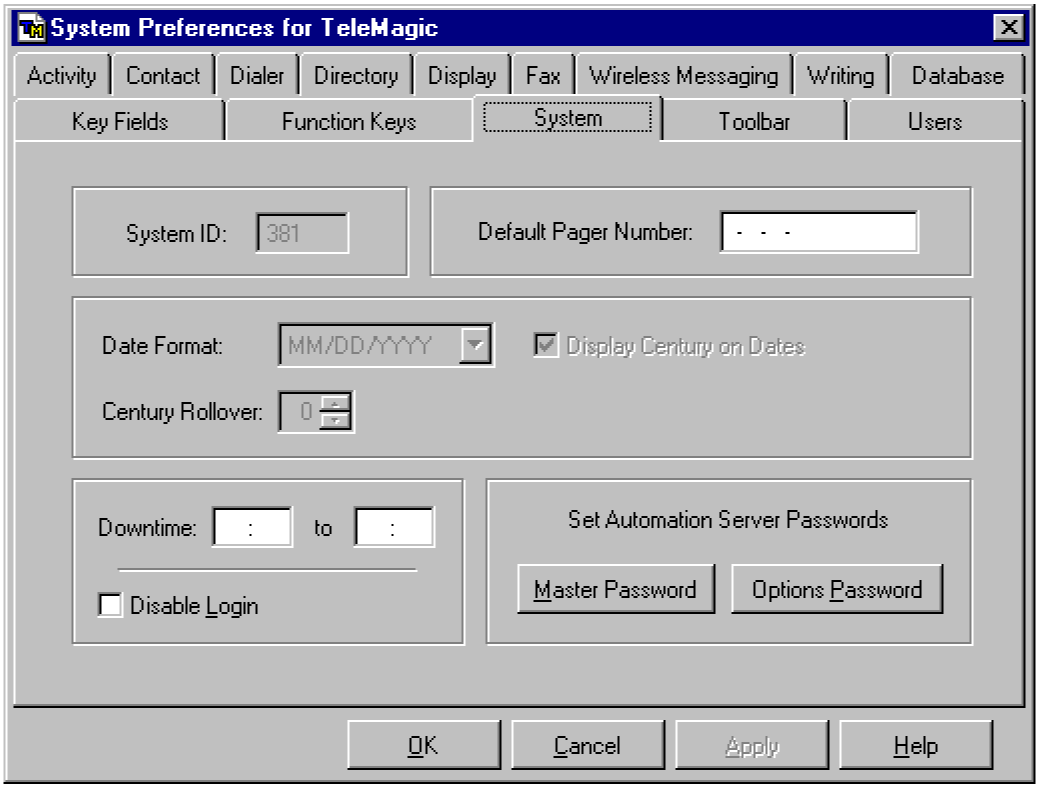


## Sample Error Log Dialog Box

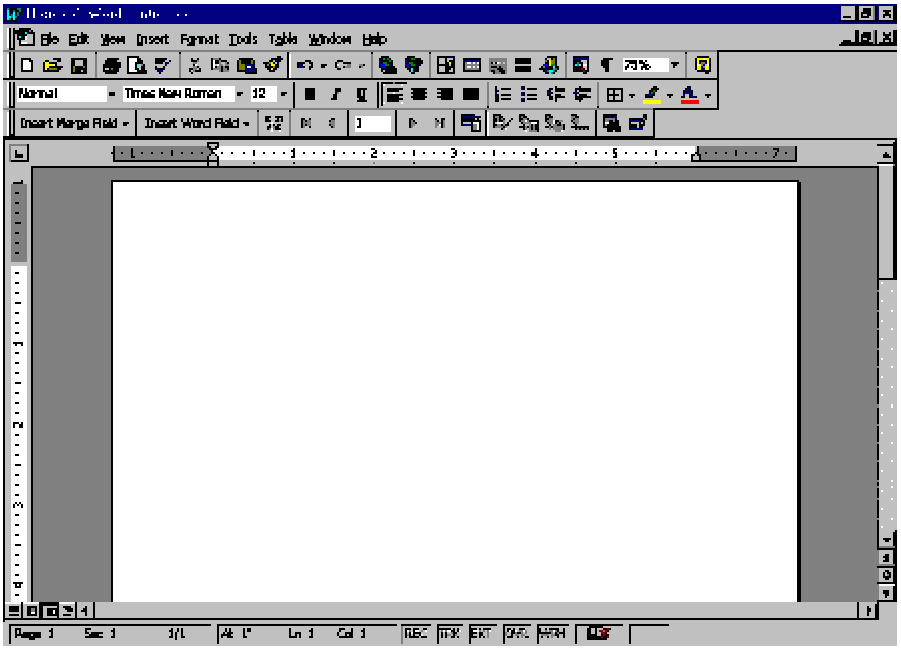


# Calculator Tool

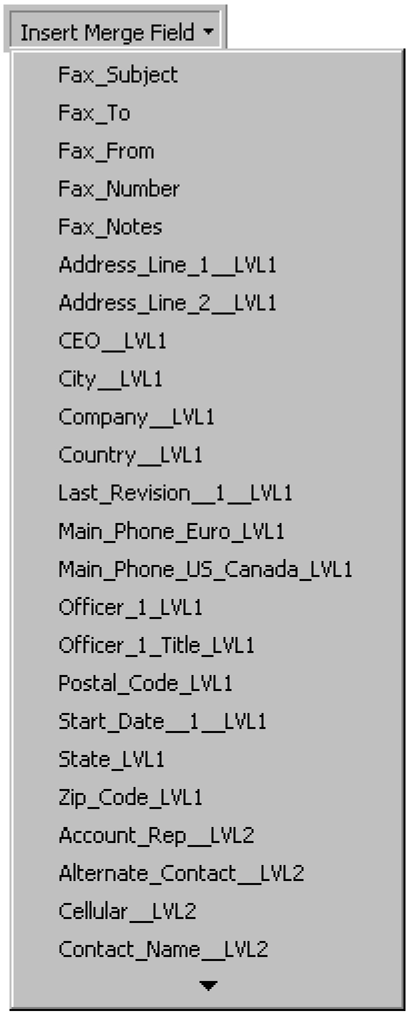
## System Preferences Screen



# Microsoft Word 97 Screen



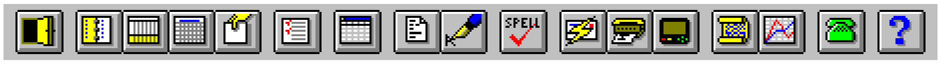
# Word 97 Merge Fields



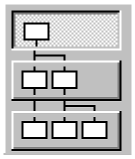
## Three Level Database

-

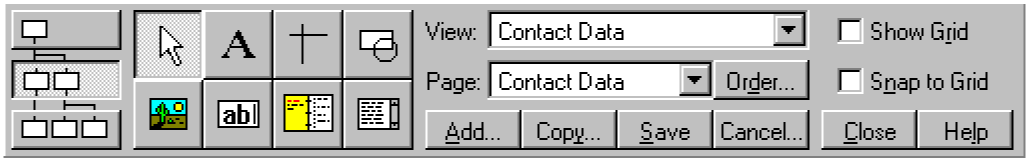
## Default Toolbar



## Screen Designer Level Selector

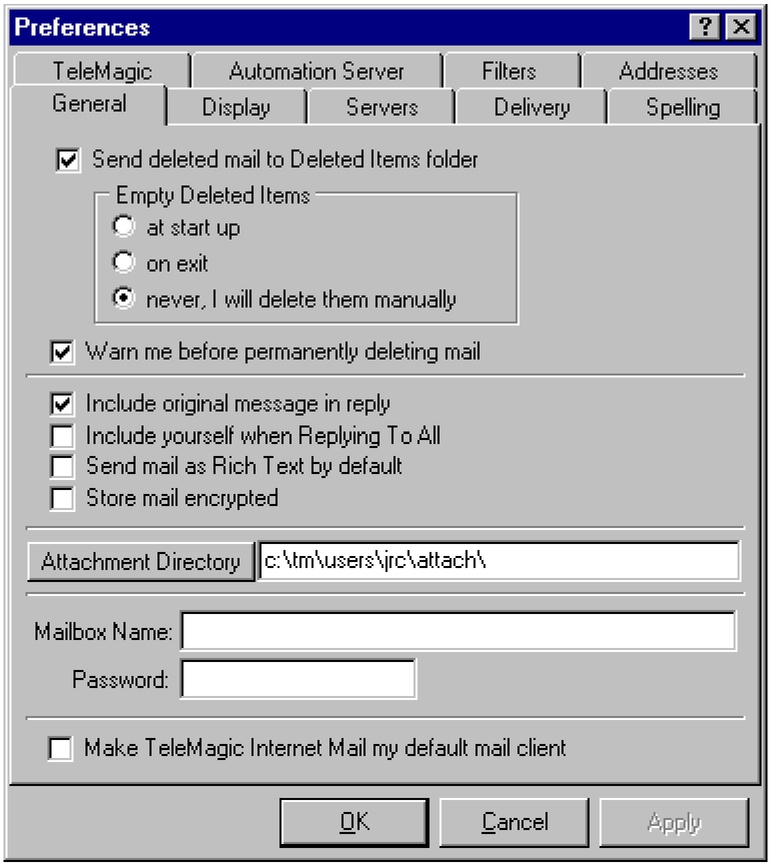


## Screen Designer Control Bar

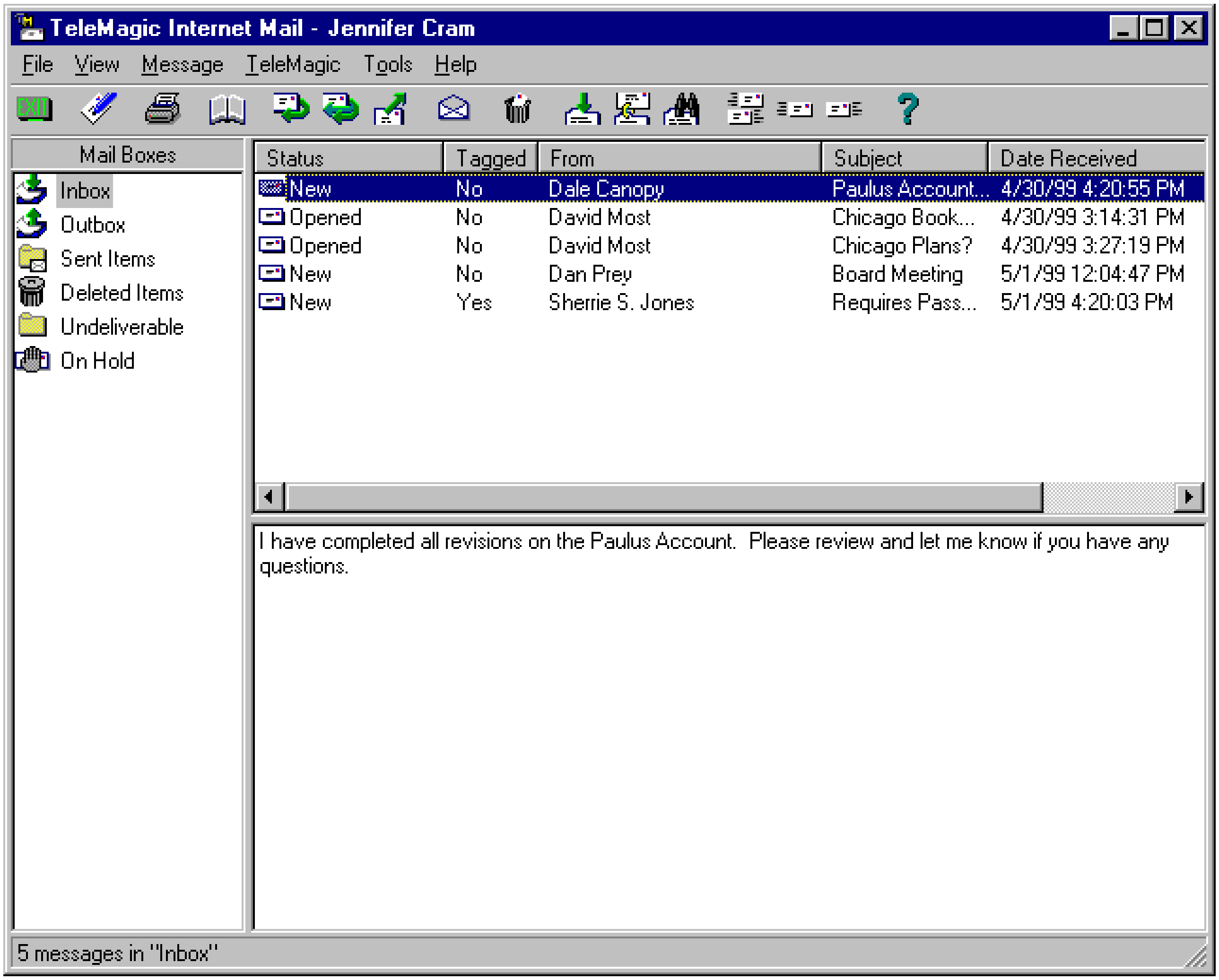


## The Copy to Folder Dialog Box

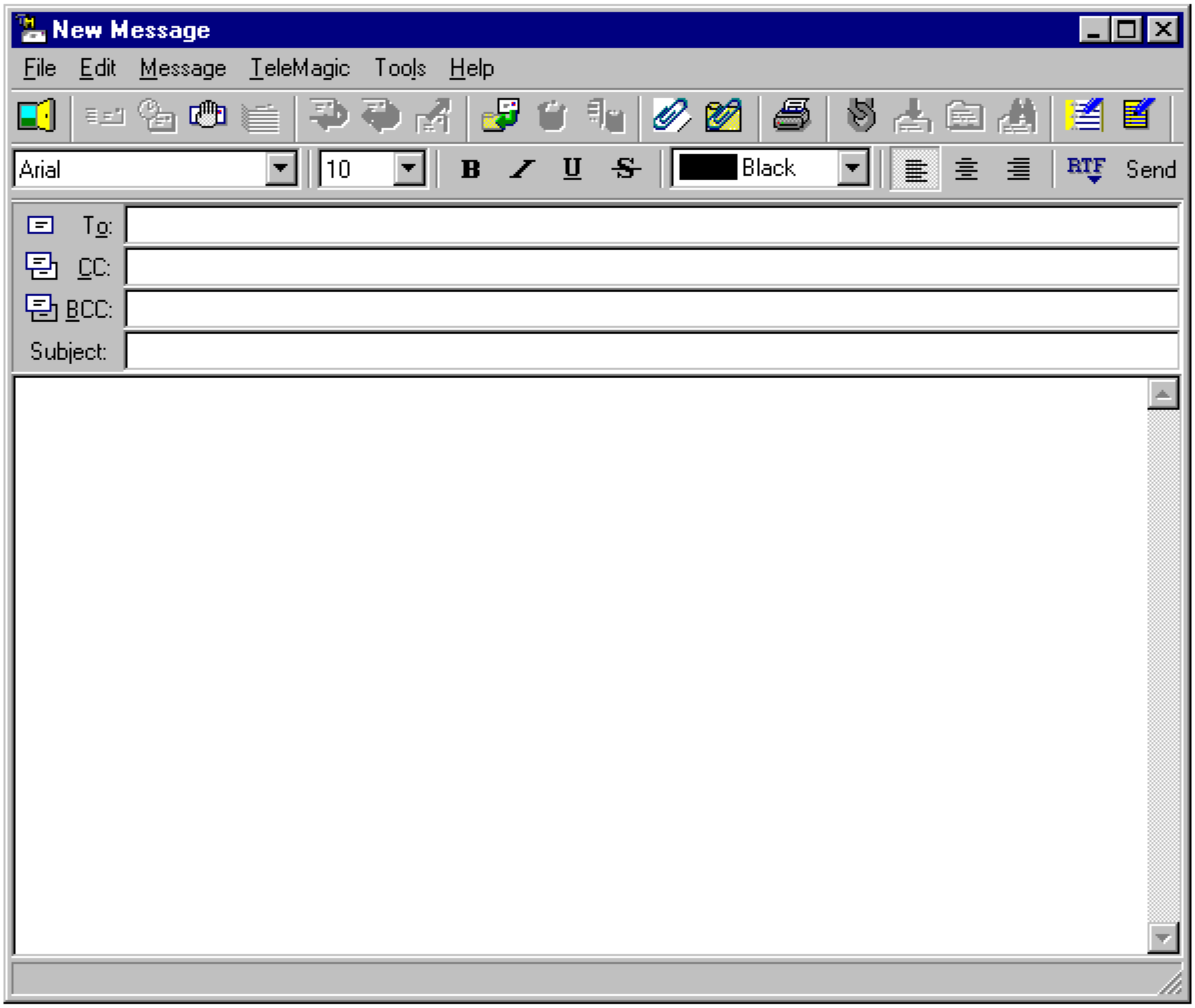
## The Preferences Dialog Box



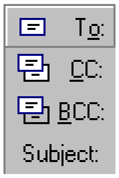

**TeleMagic Internet Mail Main Screen**


TeleMagic Internet Mail - Jennifer Cram
File View Message TeleMagic Tools Help
Mail Boxes
Inbox
Outbox
Sent Items
Deleted Items
Undeliverable
On Hold
Status Tagged From Subject Date Received
New No Dale Canopy Paulus Account... 4/30/99 4:20:55 PM
Opened No David Most Chicago Book... 4/30/99 3:14:31 PM
Opened No David Most Chicago Plans? 4/30/99 3:27:19 PM
New No Dan Prey Board Meeting 5/1/99 12:04:47 PM
New Yes Sherrie S. Jones Requires Pass... 5/1/99 4:20:03 PM
I have completed all revisions on the Paulus Account. Please review and let me know if you have any questions.
5 messages in "Inbox"

## The New Message Screen

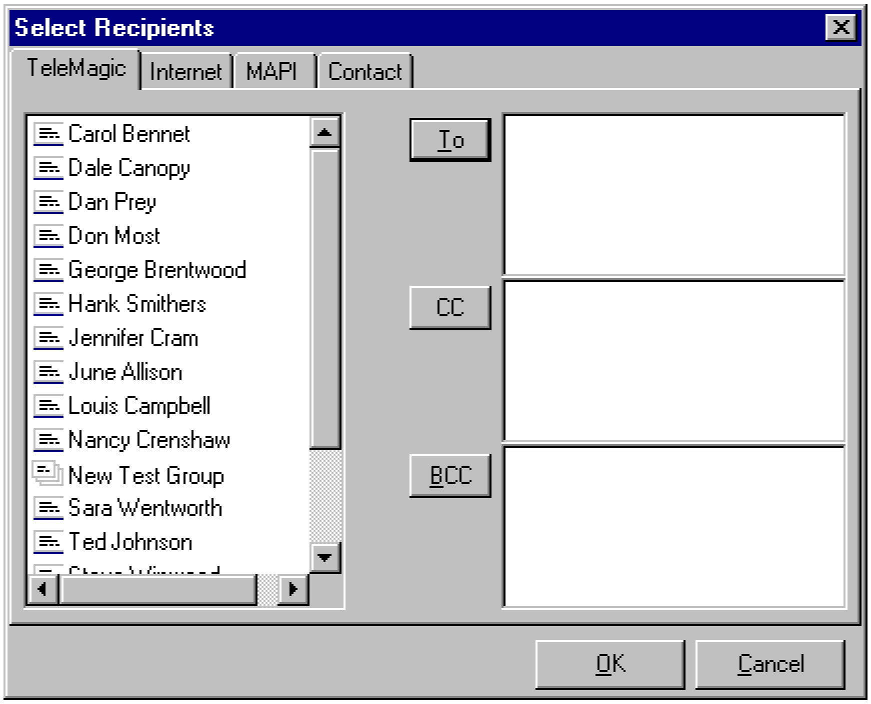


## Recipient Type Fields

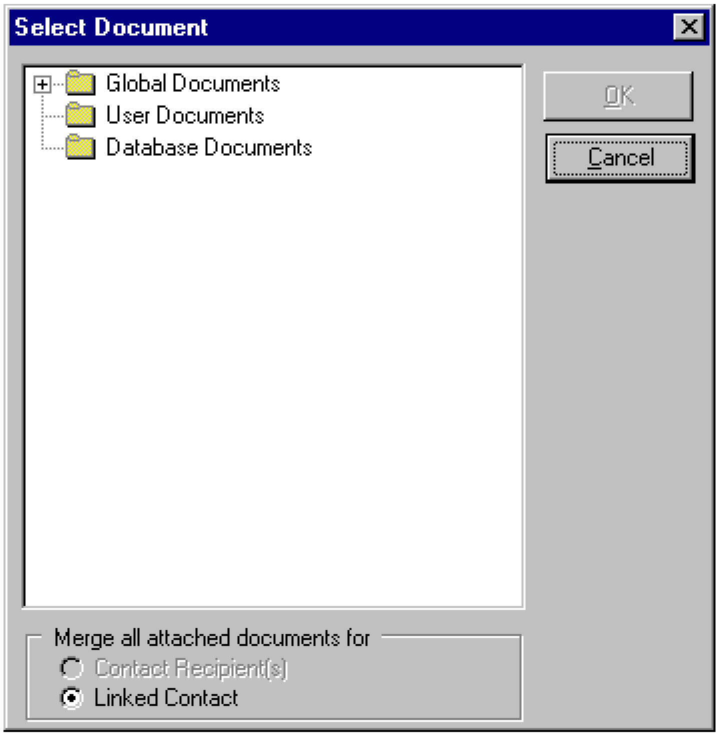



Move your mouse cursor near the recipient type you wish to address. When the field highlights, left-click the mouse to open the Address Book.

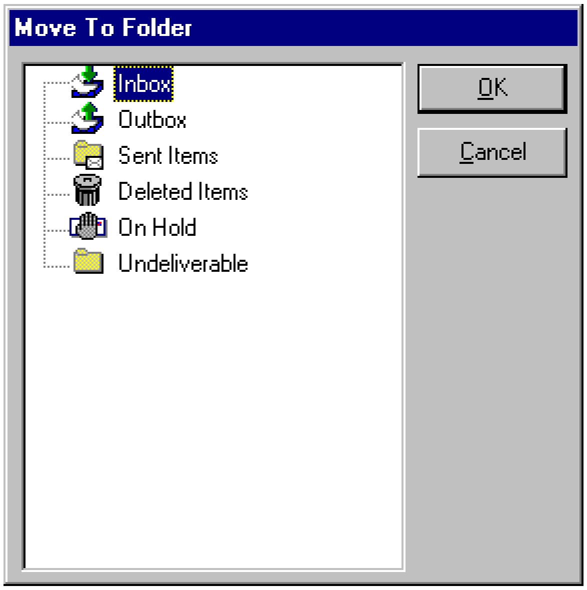
## The Select Recipients Dialog Box



## The Select Document Dialog Box



## The Move to Folder Dialog Box



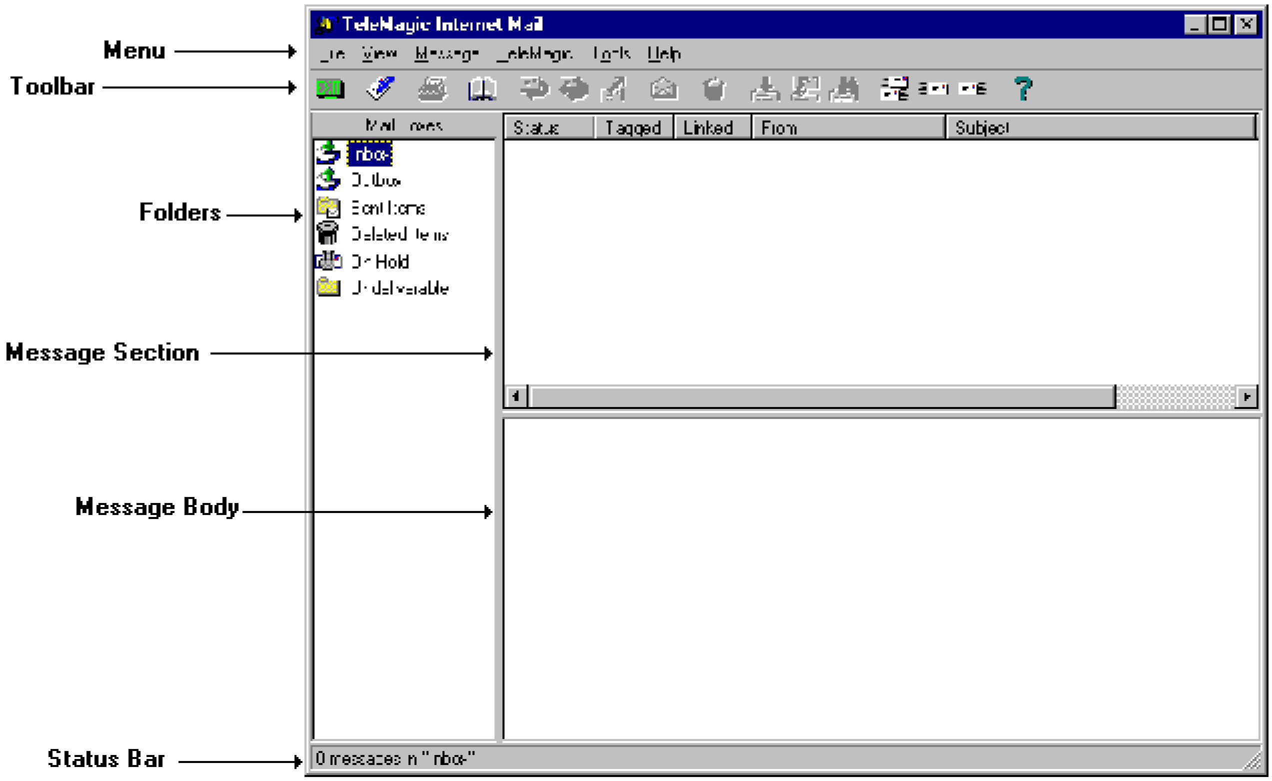

Your folders may differ.

## The Copy to Folder Dialog Box

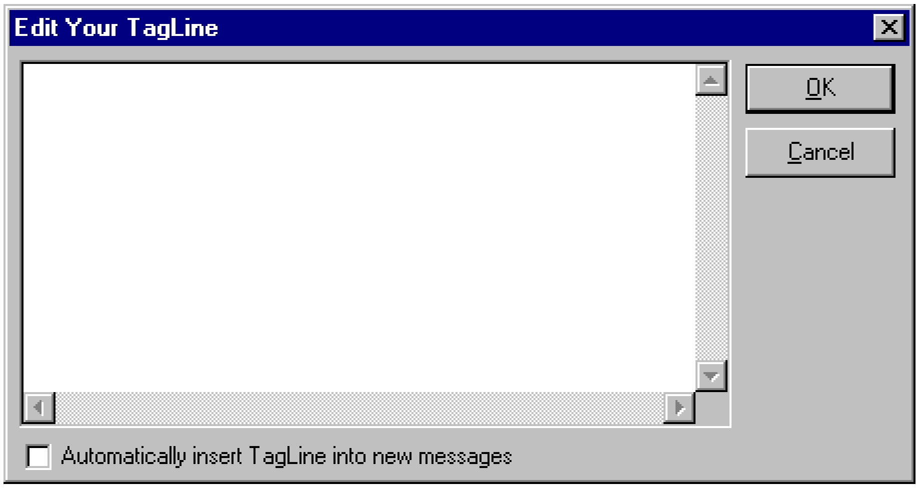
- 

Your folders may differ.

## Areas of the TeleMagic Internet Mail Main Screen



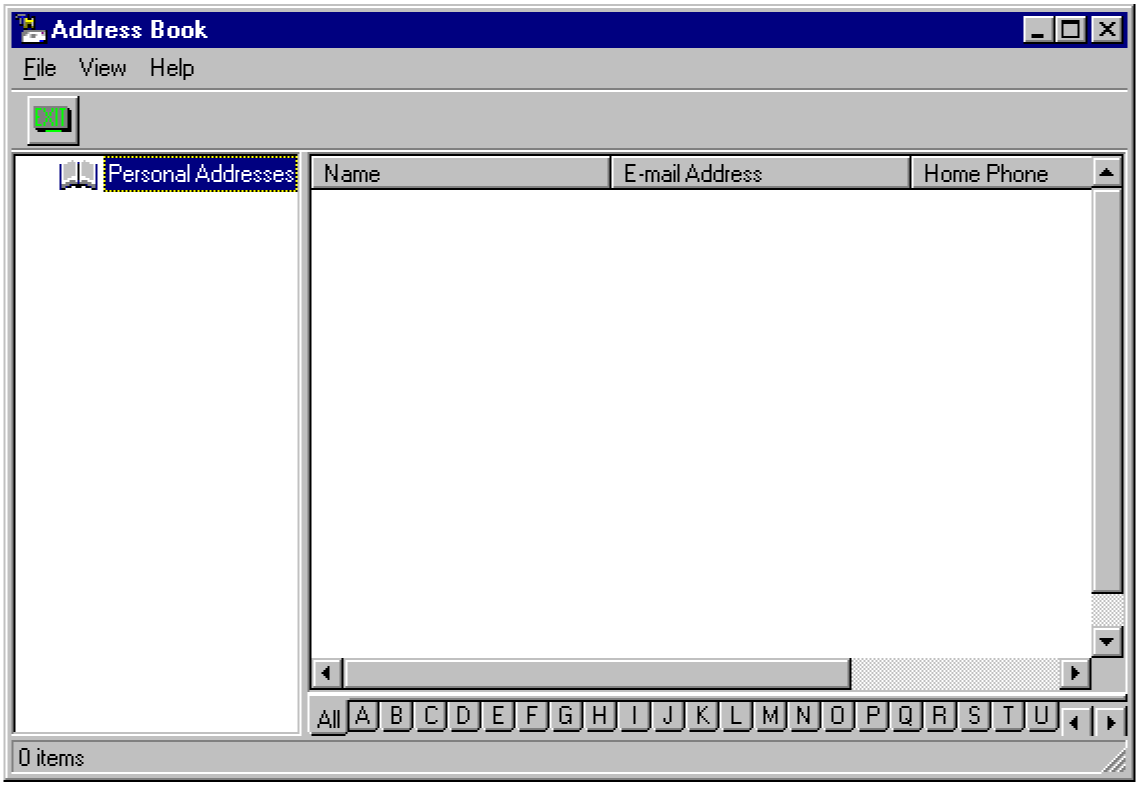
## The Edit Your TagLine Dialog Box



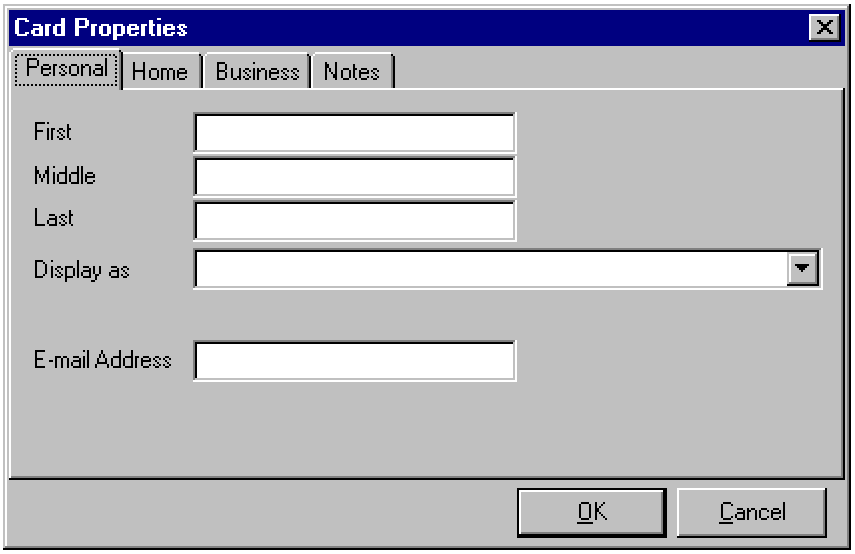
## The Preferences Dialog Box

-

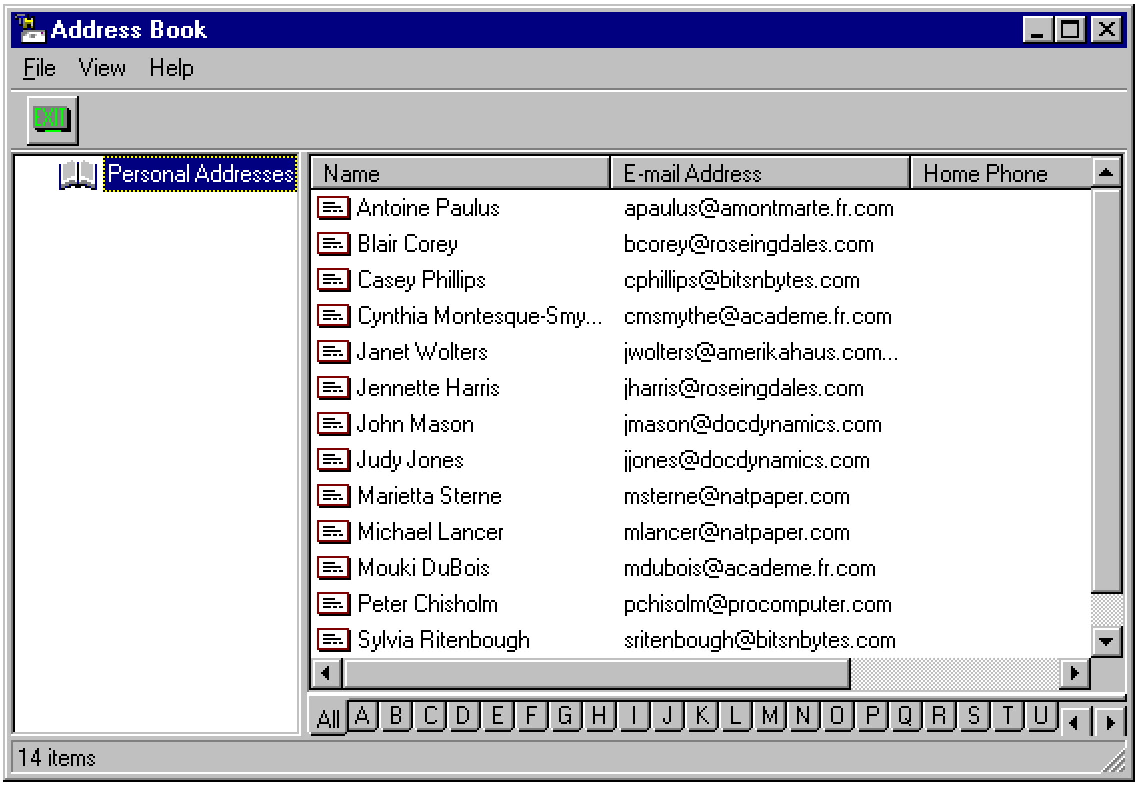
## The Address Book



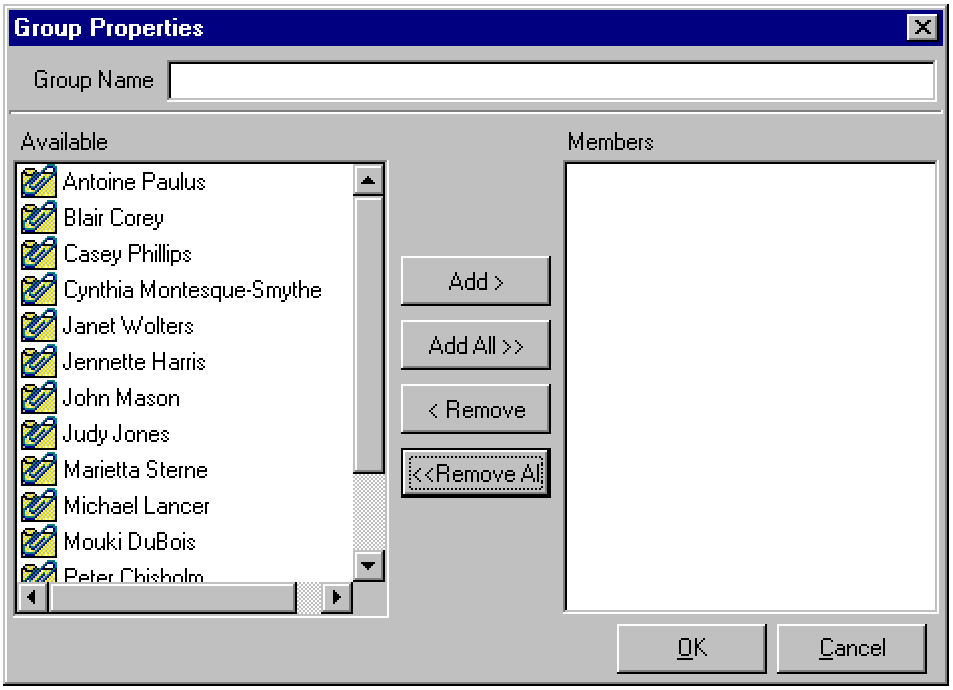
## The Card Properties Dialog Box



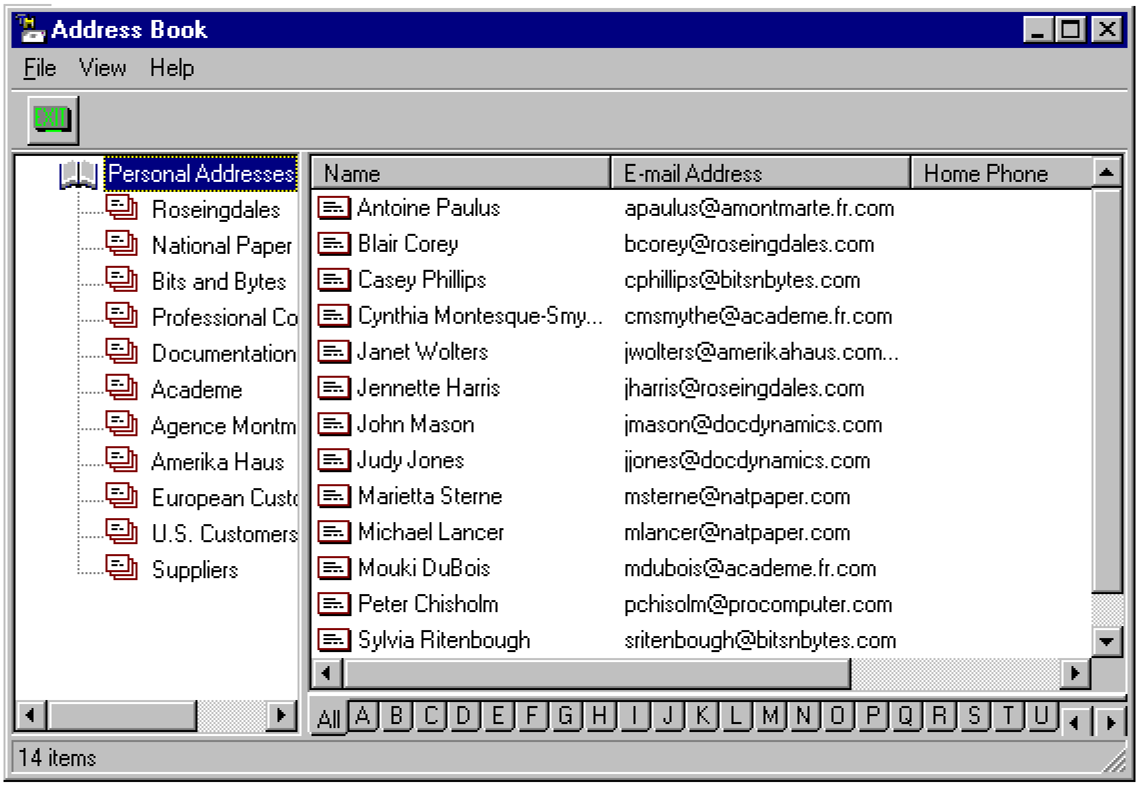
## The Address Book, with Entries



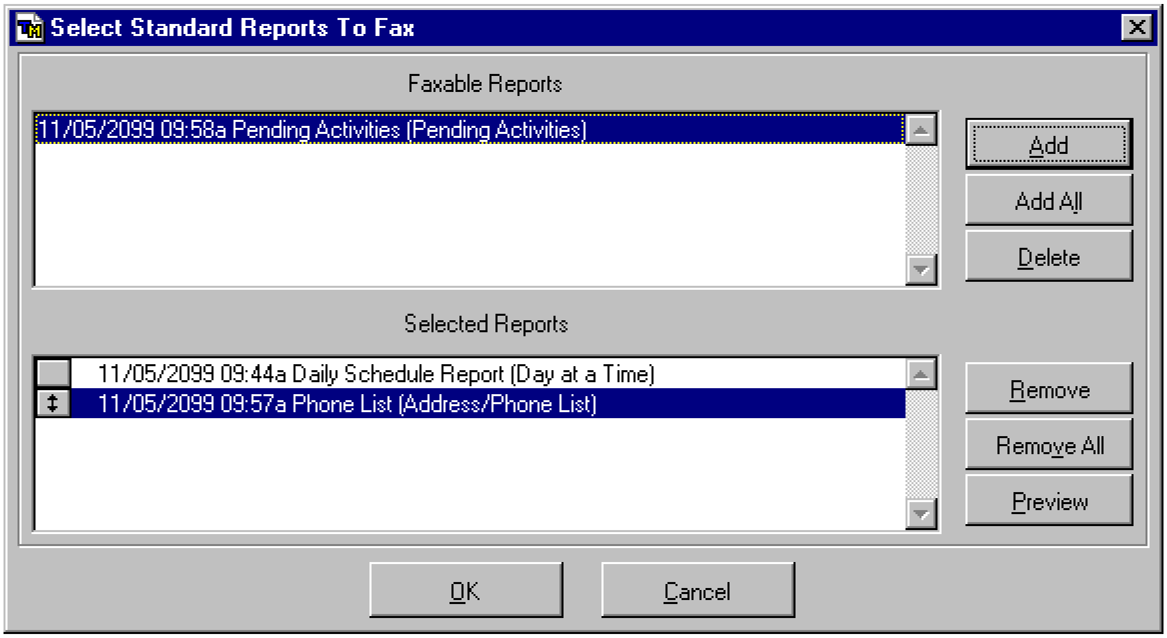
## The Group Properties Dialog Box



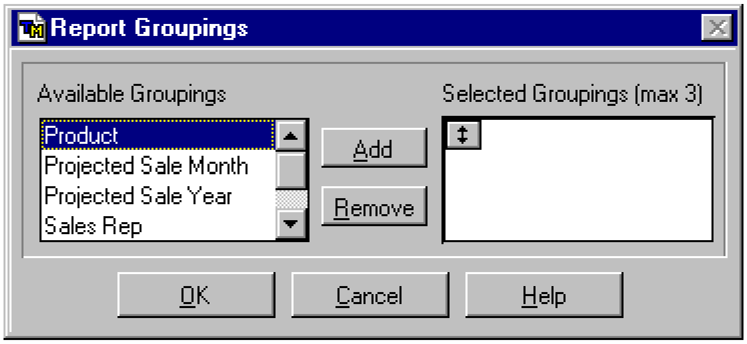
## The Address Book, with Groups



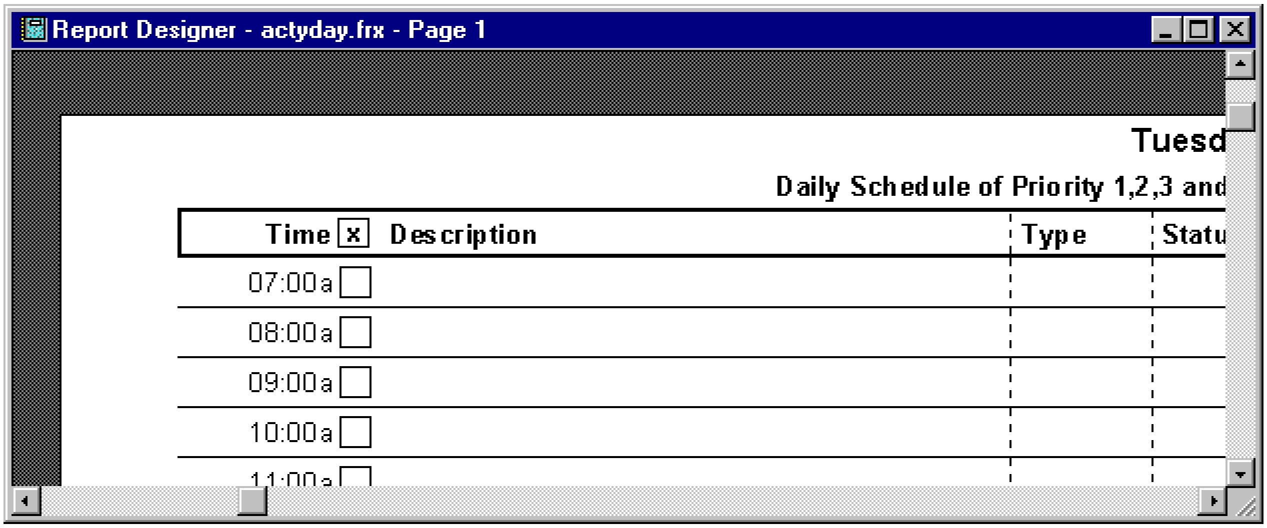
## The Select Standard Reports to Fax Dialog Box



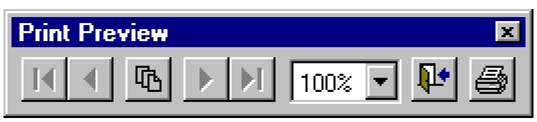
## Report Groupings Dialog Box



## Report Designer preview window

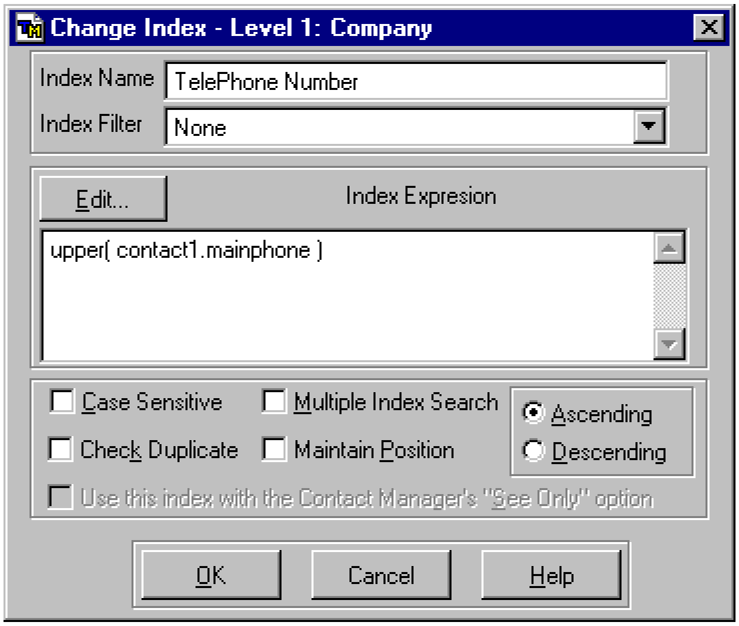



## Print Preview Toolbar

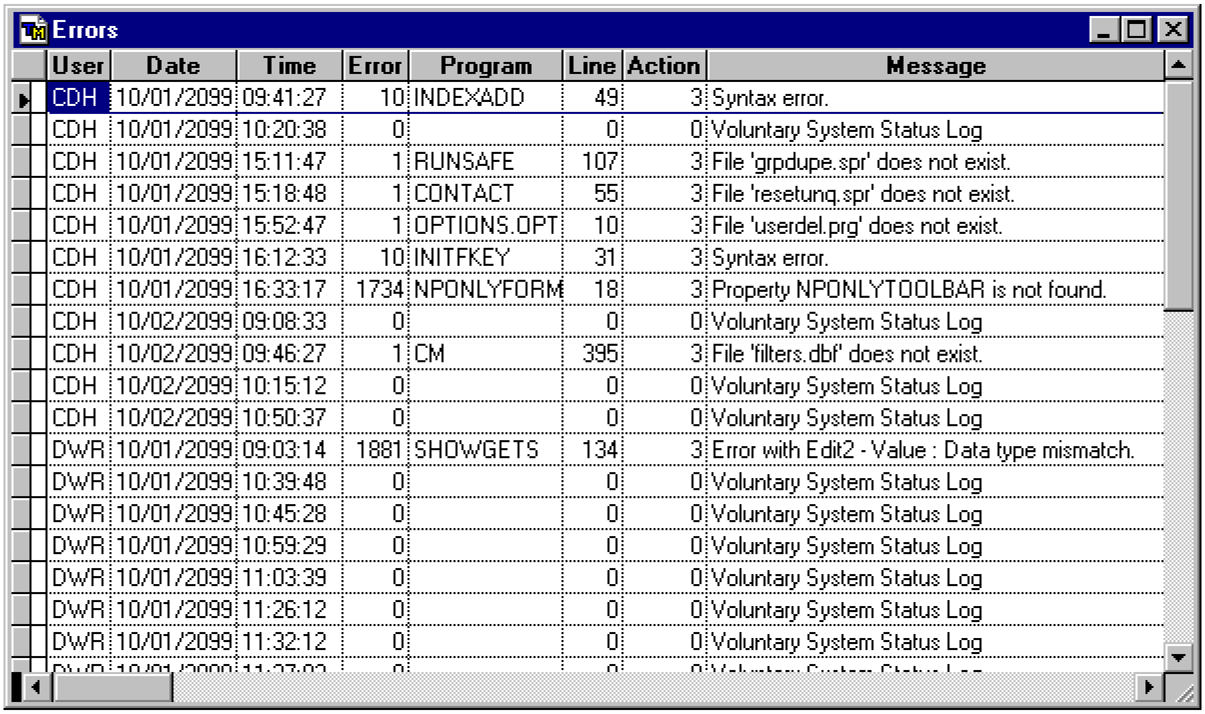


## Browse Index and Filter Selection Box

## Change Index Dialog Box



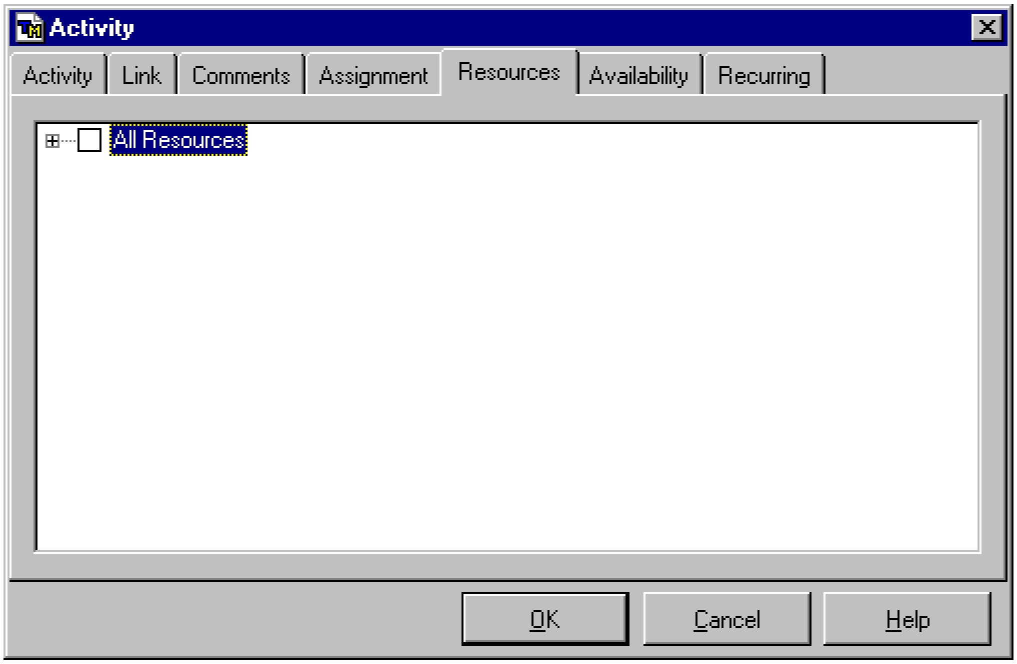
## Errors Browse Window



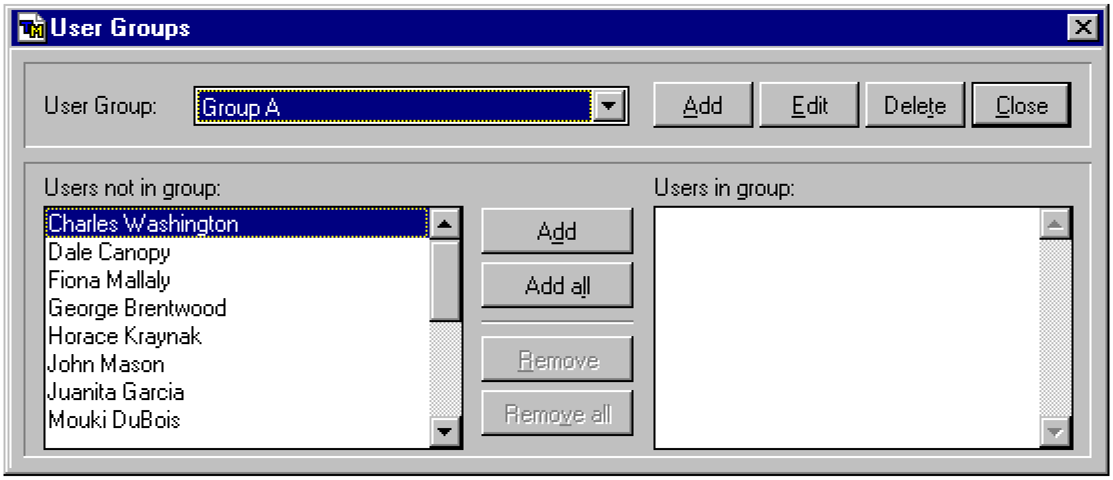


| User | Date | Time | Error | Program | Line | Action | Message |
|---|---|---|---|---|---|---|---|
| CDH | 10/01/2099 | 09:41:27 | 10 | INDEXADD | 49 | 3 | Syntax error. |
| CDH | 10/01/2099 | 10:20:38 | 0 | | 0 | 0 | Voluntary System Status Log |
| CDH | 10/01/2099 | 15:11:47 | 1 | RUNSAFE | 107 | 3 | File 'grpdupe.spr' does not exist. |
| CDH | 10/01/2099 | 15:18:48 | 1 | CONTACT | 55 | 3 | File 'resetunq.spr' does not exist. |
| CDH | 10/01/2099 | 15:52:47 | 1 | OPTIONS.OPT | 10 | 3 | File 'userdel.prg' does not exist. |
| CDH | 10/01/2099 | 16:12:33 | 10 | INITFKEY | 31 | 3 | Syntax error. |
| CDH | 10/01/2099 | 16:33:17 | 1734 | NPONLYFORM | 18 | 3 | Property NPONLYTOOLBAR is not found. |
| CDH | 10/02/2099 | 09:08:33 | 0 | | 0 | 0 | Voluntary System Status Log |
| CDH | 10/02/2099 | 09:46:27 | 1 | CM | 395 | 3 | File 'filters.dbf' does not exist. |
| CDH | 10/02/2099 | 10:15:12 | 0 | | 0 | 0 | Voluntary System Status Log |
| CDH | 10/02/2099 | 10:50:37 | 0 | | 0 | 0 | Voluntary System Status Log |
| DWR | 10/01/2099 | 09:03:14 | 1881 | SHOWGETS | 134 | 3 | Error with Edit2 - Value : Data type mismatch. |
| DWR | 10/01/2099 | 10:39:48 | 0 | | 0 | 0 | Voluntary System Status Log |
| DWR | 10/01/2099 | 10:45:28 | 0 | | 0 | 0 | Voluntary System Status Log |
| DWR | 10/01/2099 | 10:59:29 | 0 | | 0 | 0 | Voluntary System Status Log |
| DWR | 10/01/2099 | 11:03:39 | 0 | | 0 | 0 | Voluntary System Status Log |
| DWR | 10/01/2099 | 11:26:12 | 0 | | 0 | 0 | Voluntary System Status Log |
| DWR | 10/01/2099 | 11:32:12 | 0 | | 0 | 0 | Voluntary System Status Log |

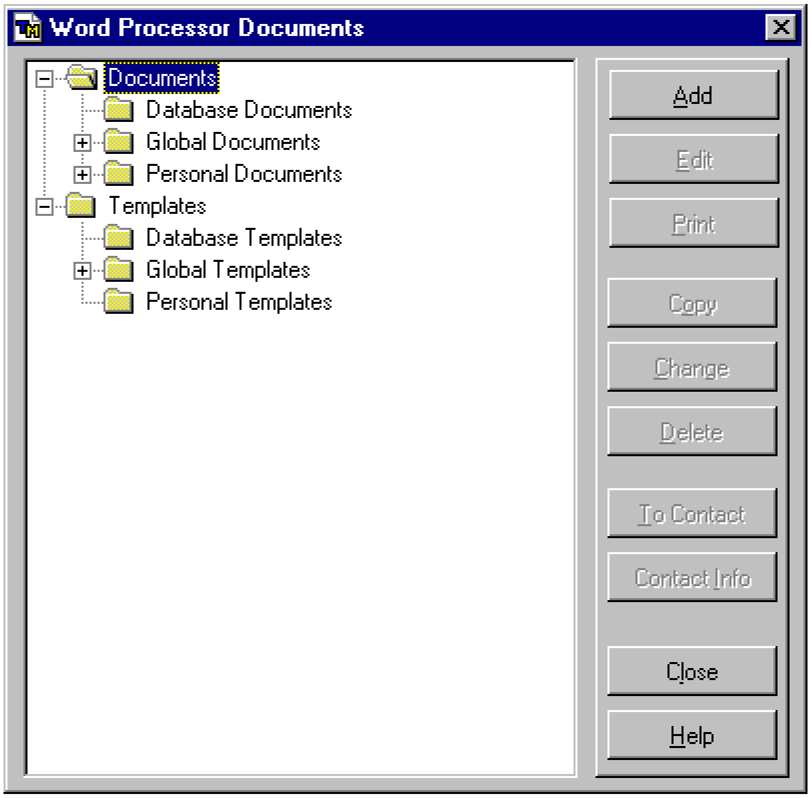
## Activity Dialog Box, Resources Page



## User Groups Dialog Box

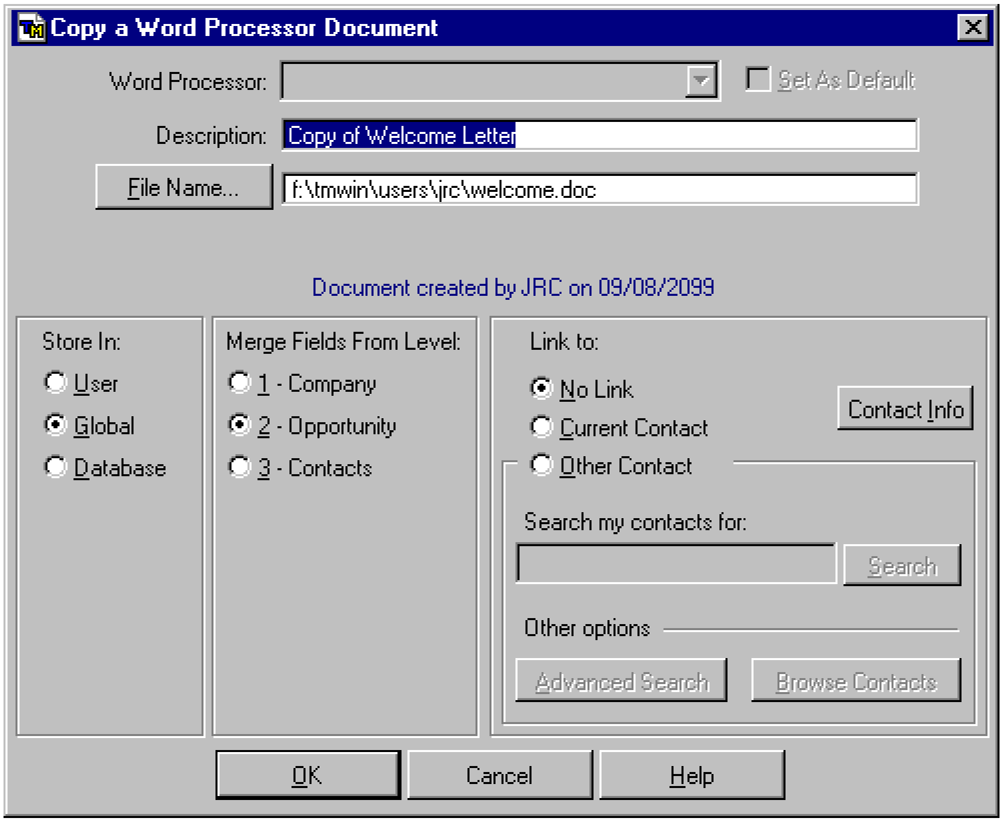


## Word Processor Documents Dialog Box

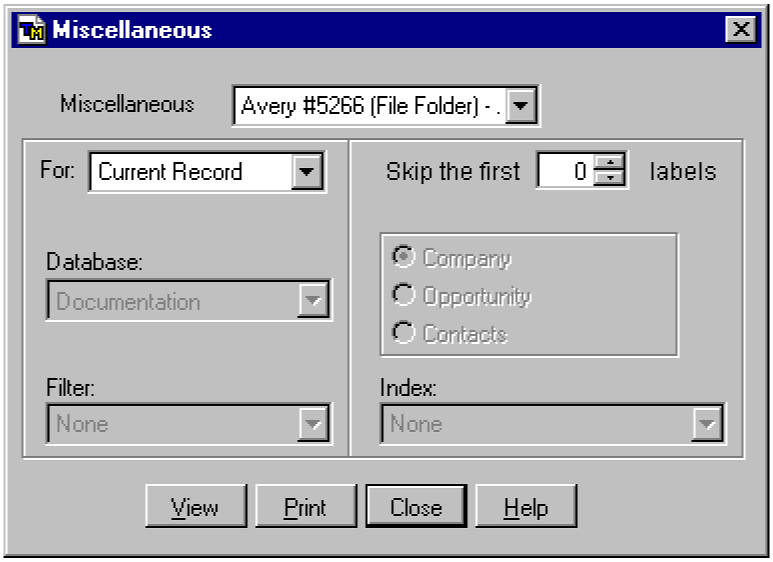


## Browse Edit Dialog Box

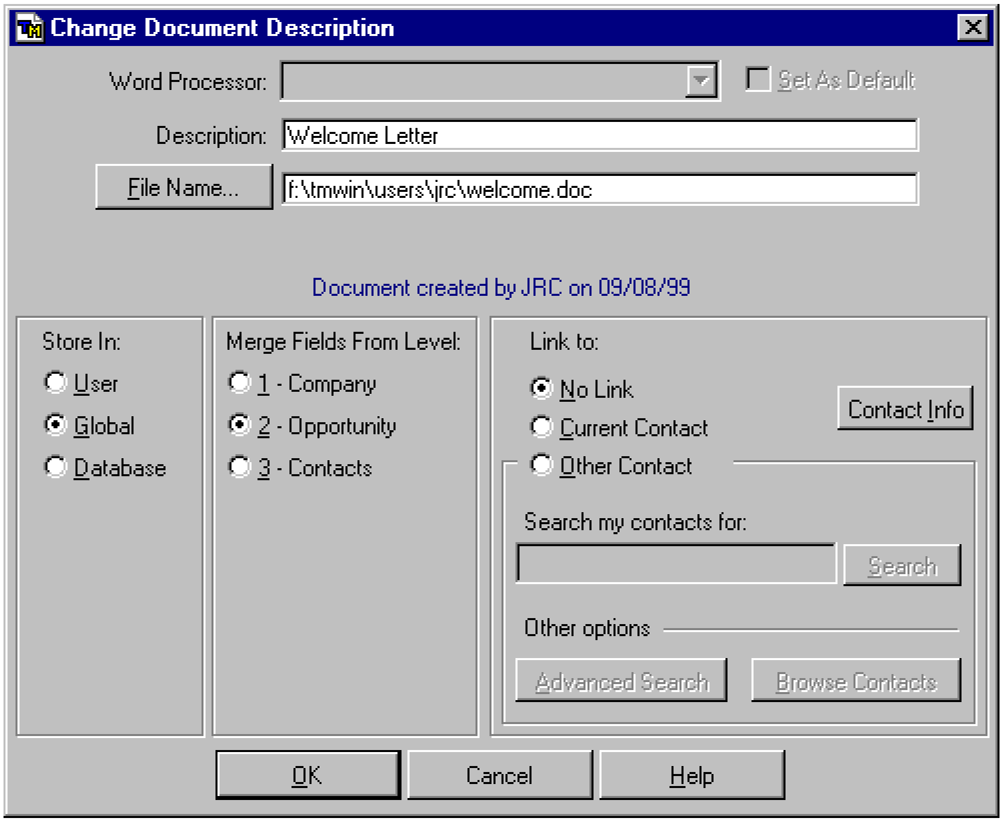
## Copy a Word Processor Document Dialog Box



## Miscellaneous Dialog Box

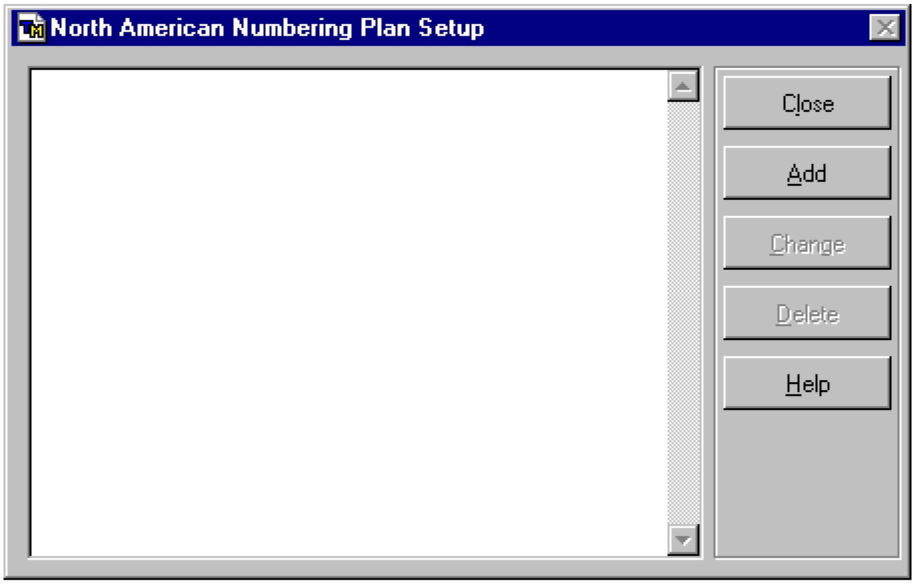


## Change Document Description Dialog Box

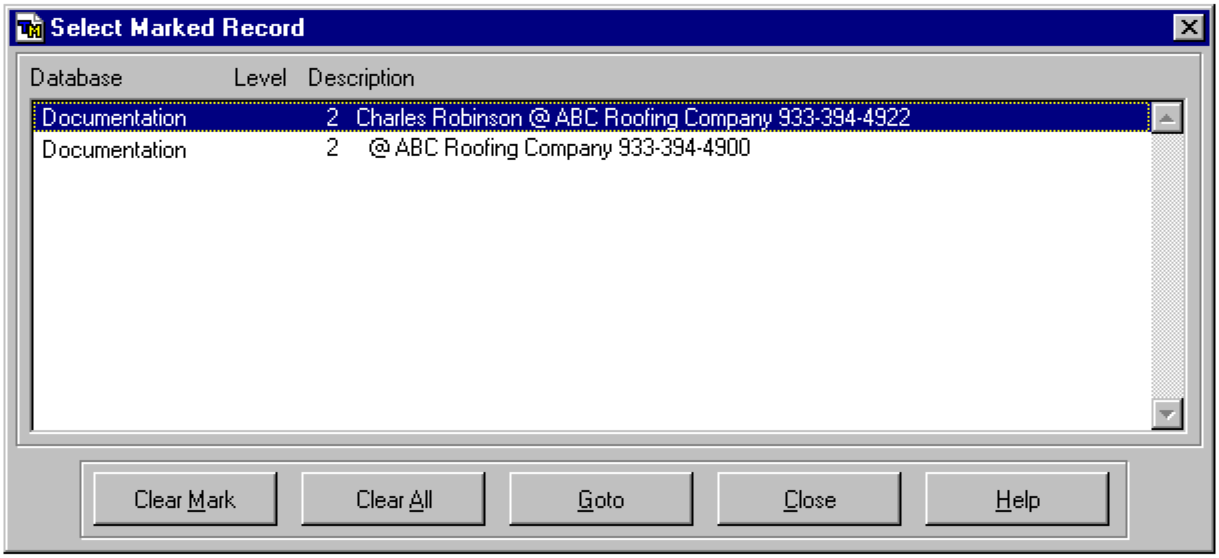


## Contact Information Dialog Box

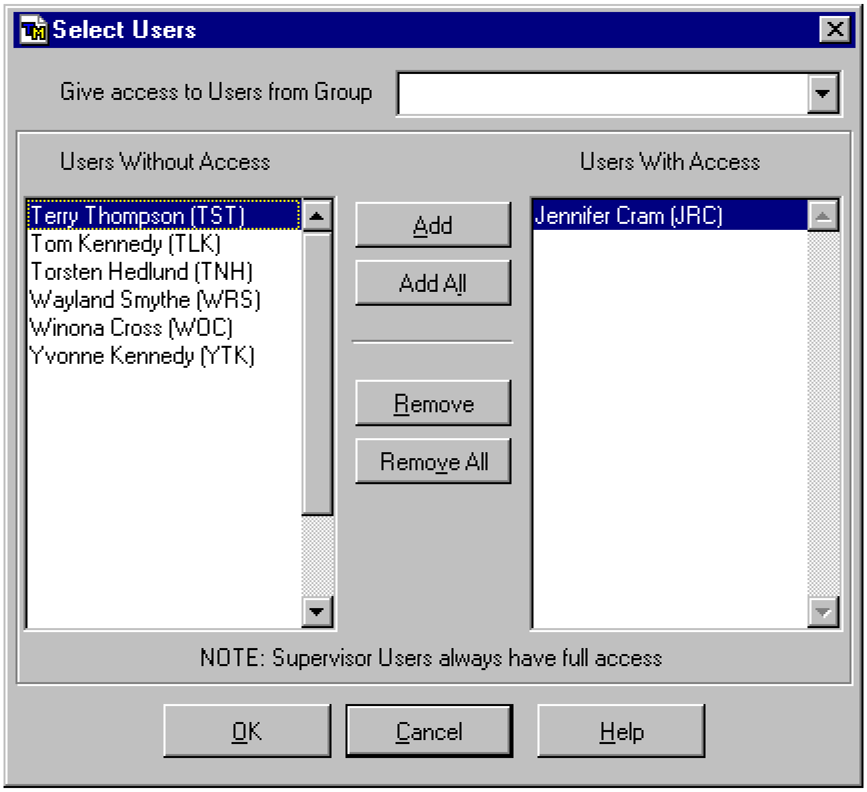
## North American Numbering Plan Setup Dialog Box



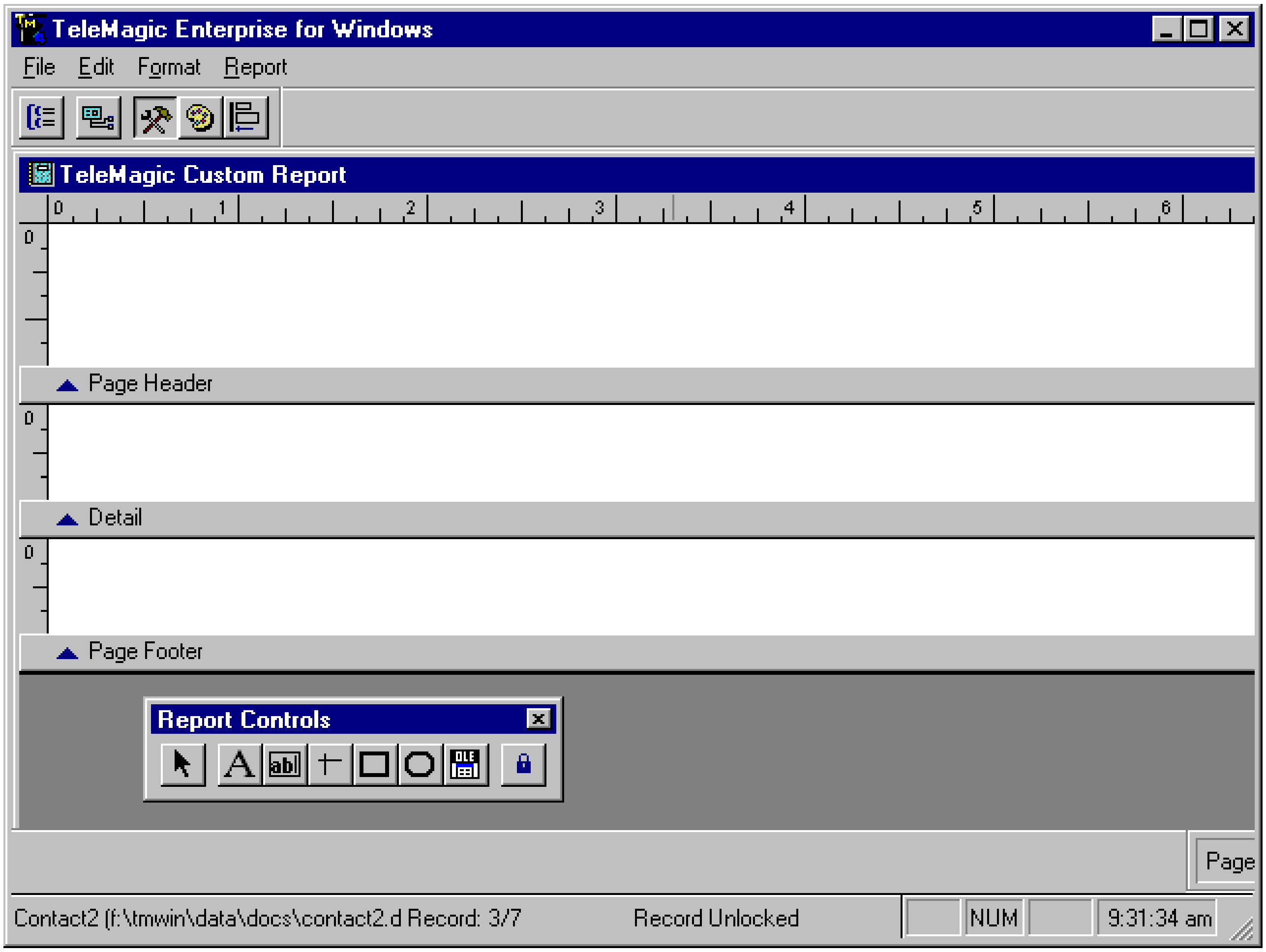
## Select Marked Record Dialog Box



## Select Users Dialog Box

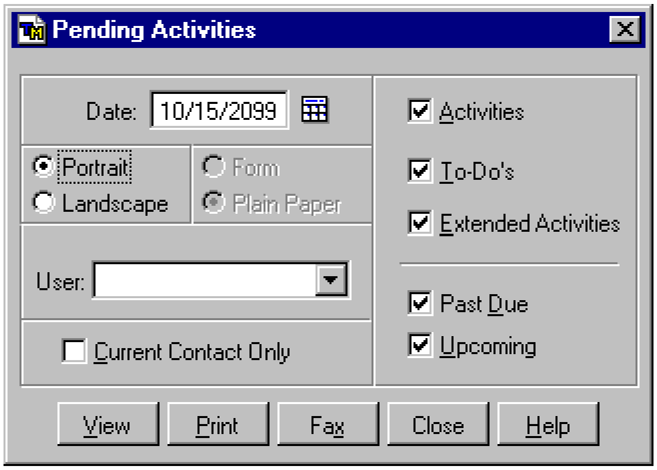


## TeleMagic Report Generator Screen

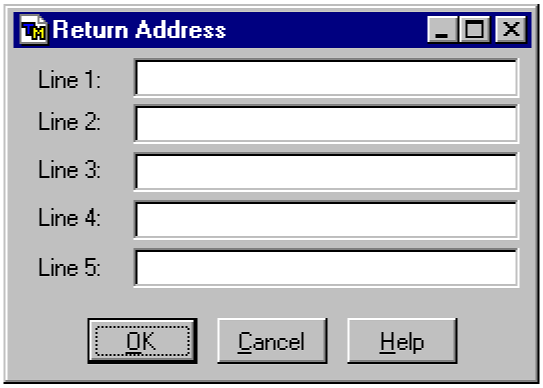



(To include the maximum detail, the screen shown is reduced and the Report Controls toolbar has been reconfigured. This is not exactly how the Report Generator will appear when you first open it.)

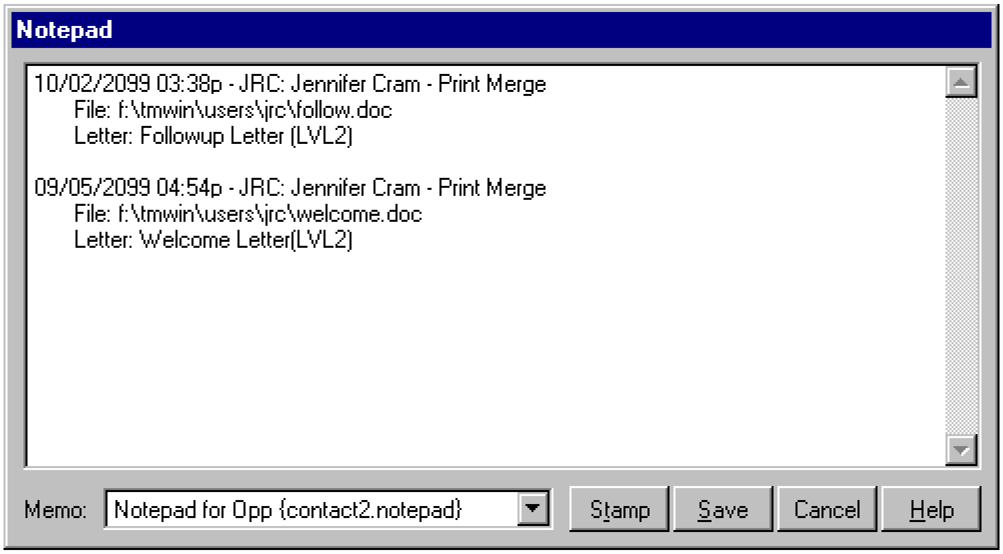
## Pending Activities Dialog Box



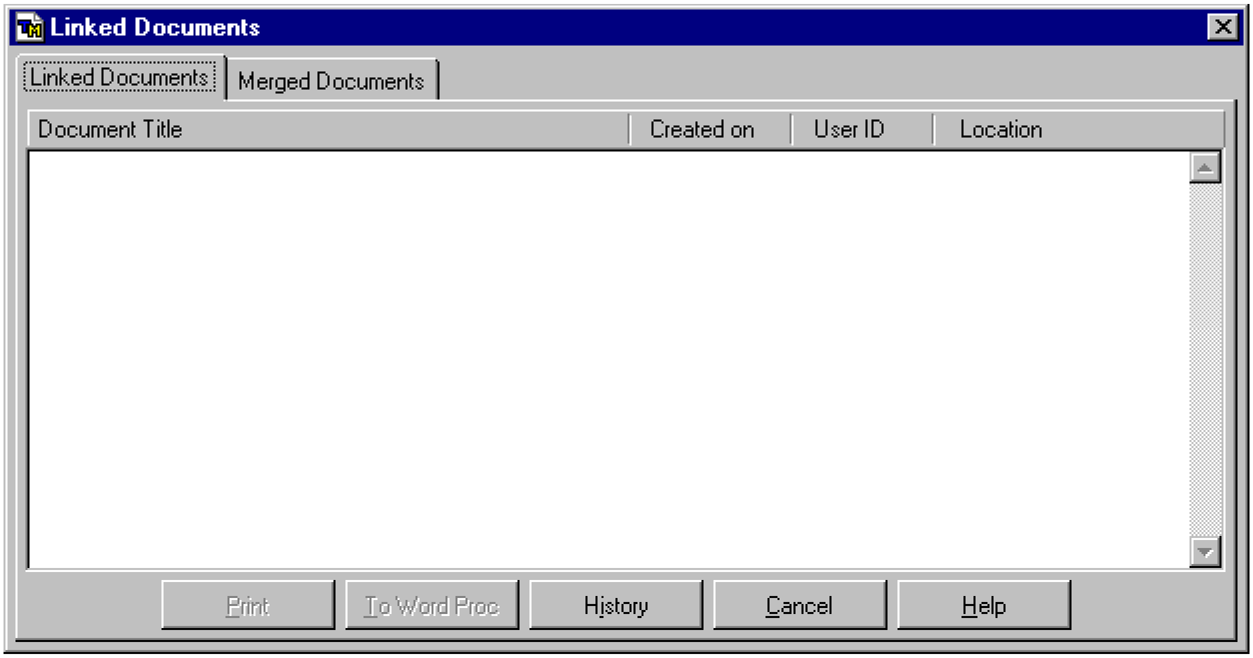
## Return Address Dialog Box



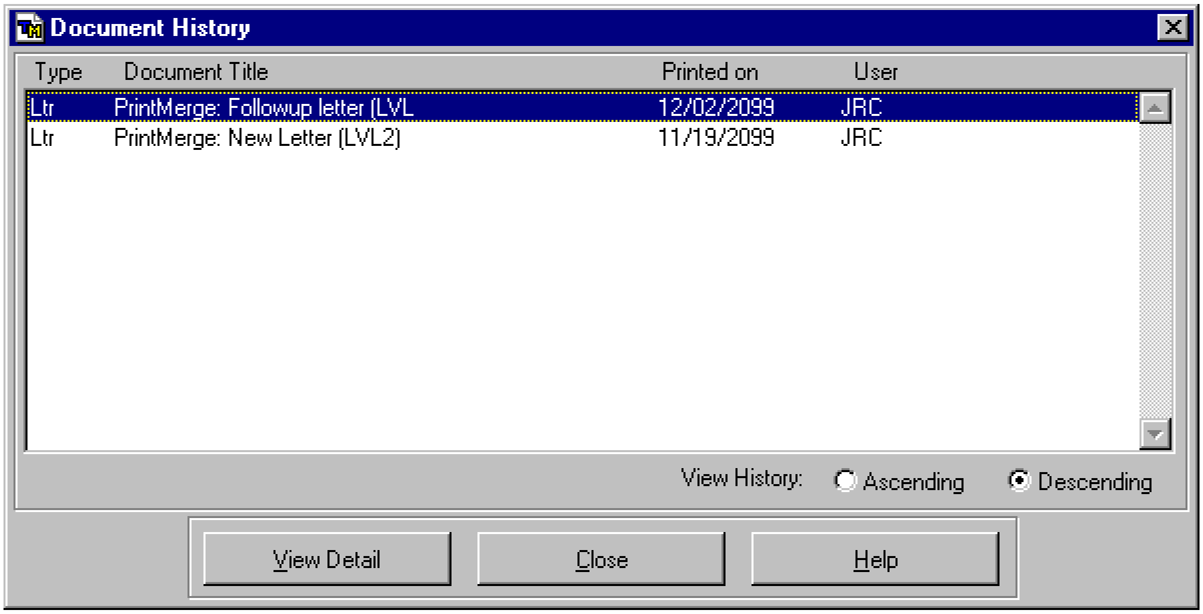
## Notepad Dialog Box



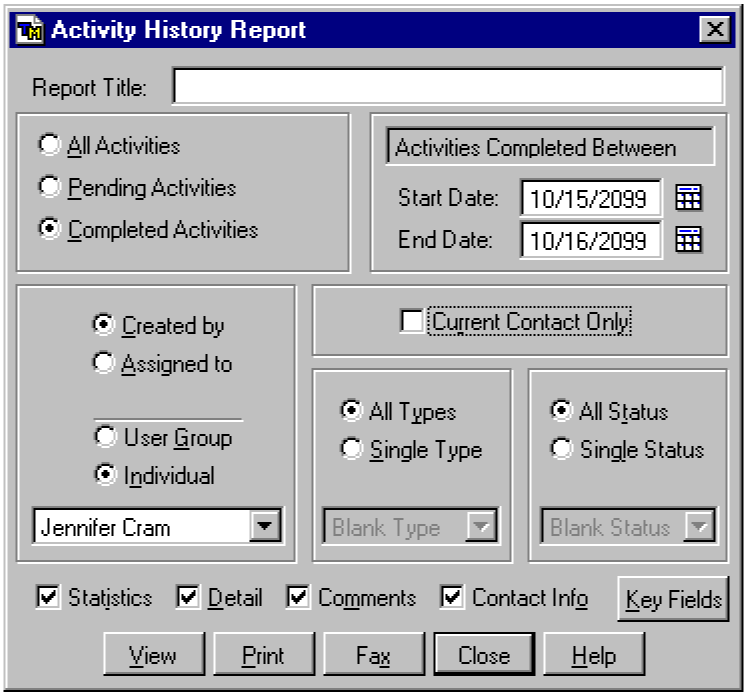
## Linked Documents Dialog Box



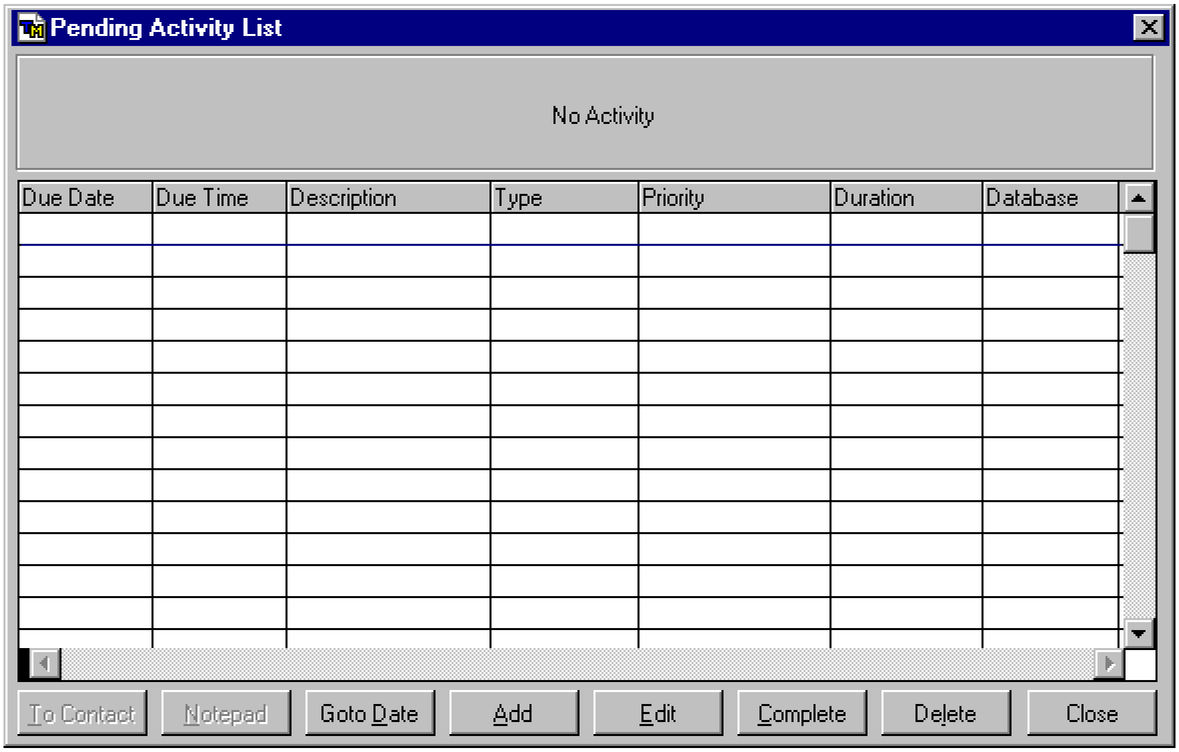
## Document History Dialog Box



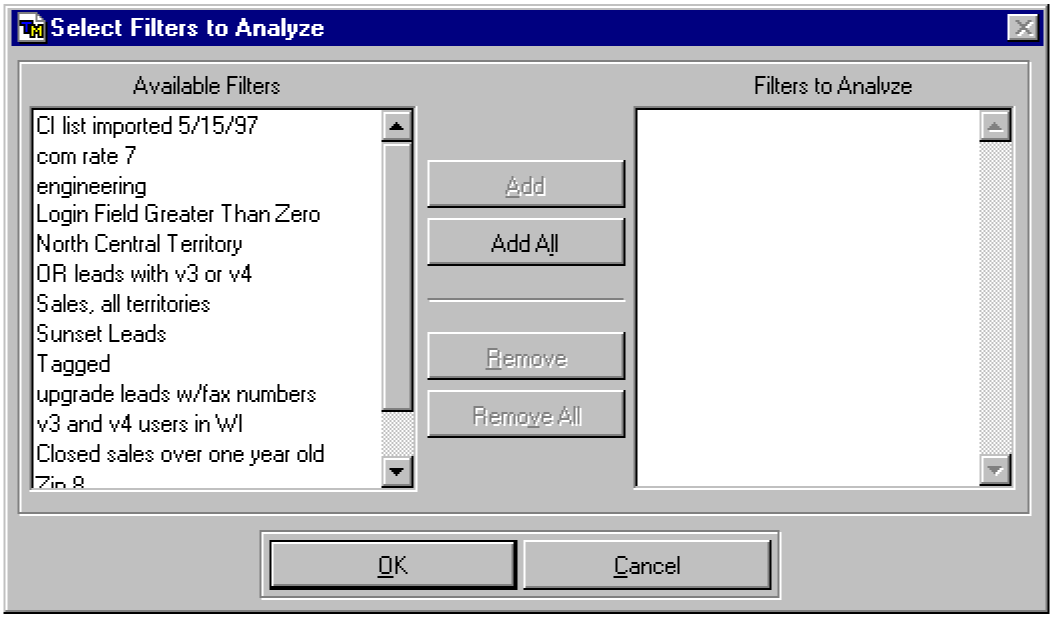
## Activity History Report Dialog Box



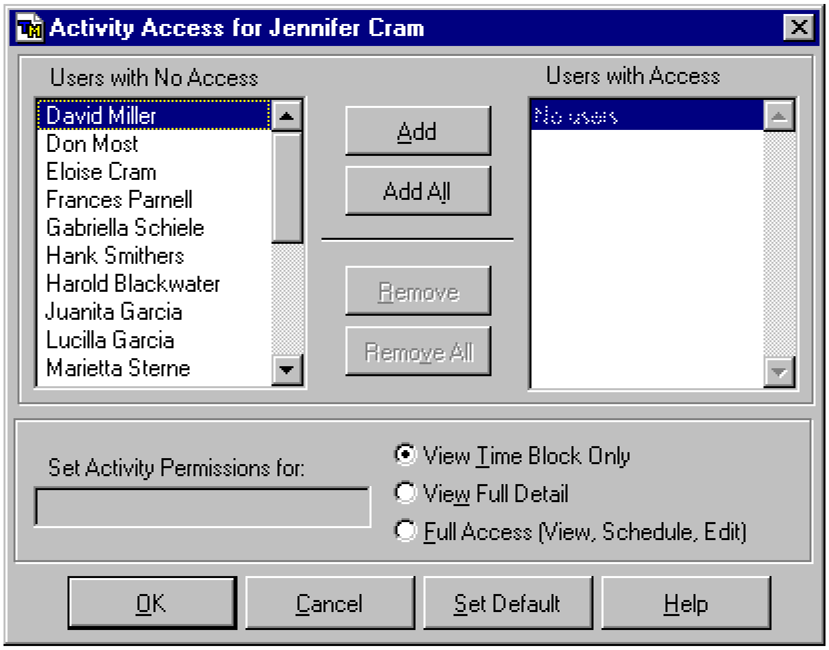
## Pending Activity List Dialog Box



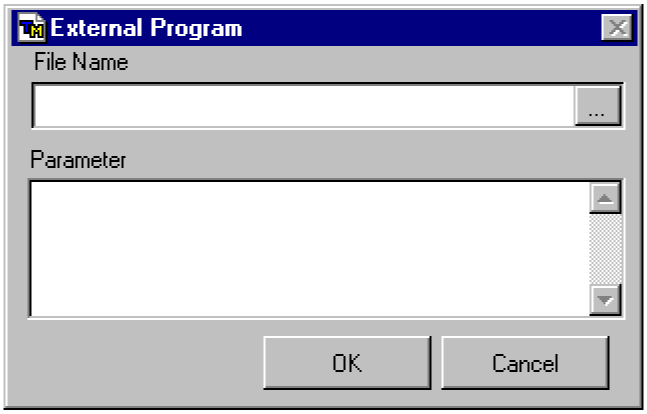
## Select Filters to Analyze Dialog Box



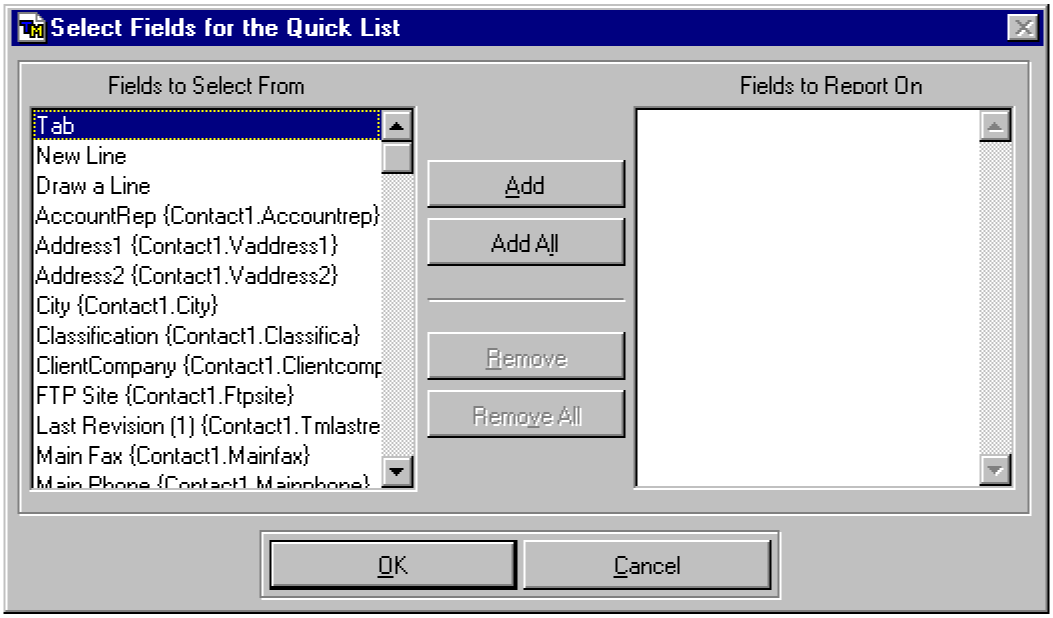
## Activity Access Dialog Box



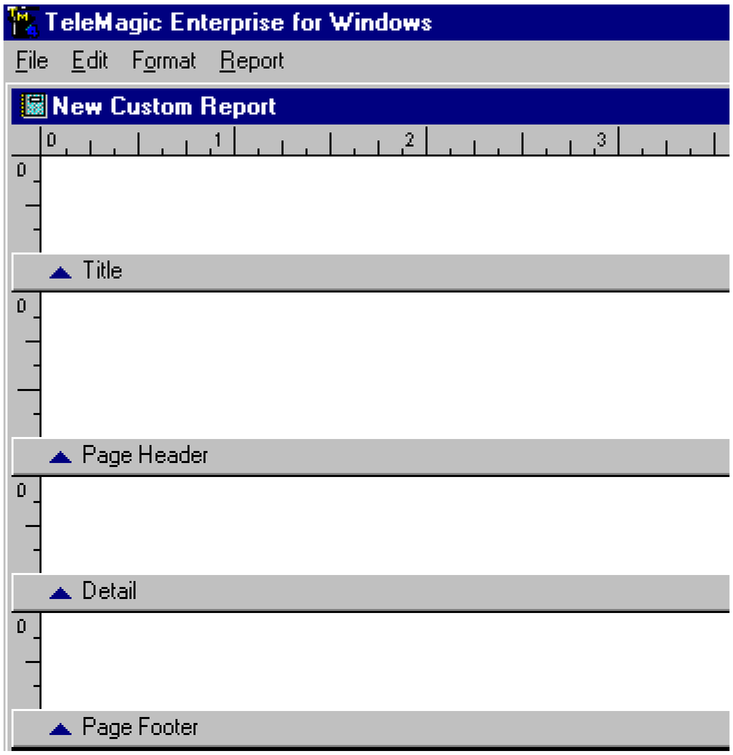
## External Program Dialog Box



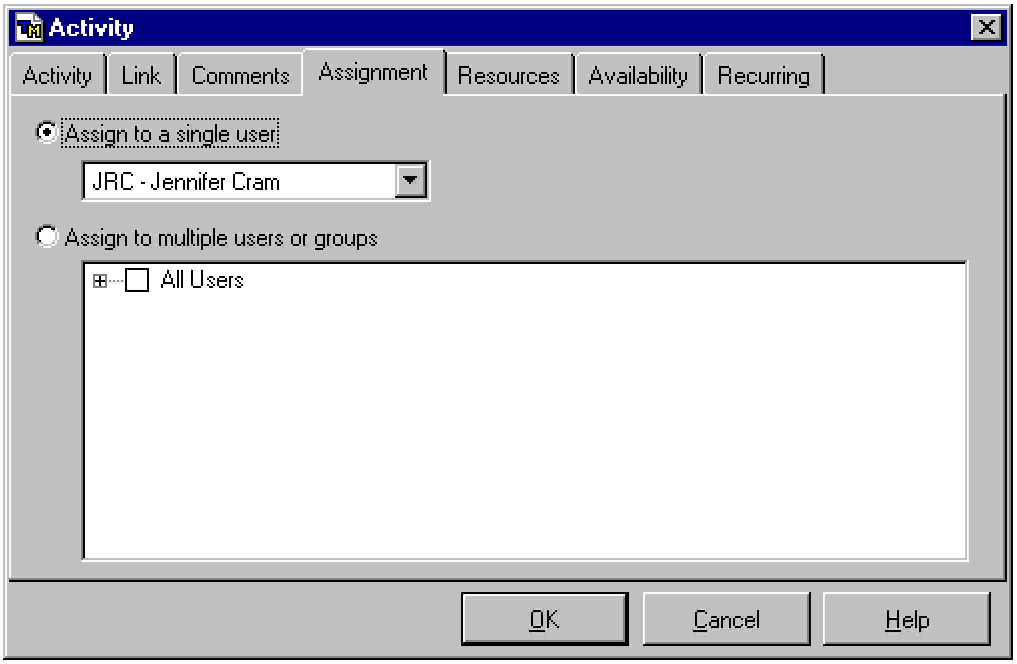
## Select Fields for the Quick List Dialog Box



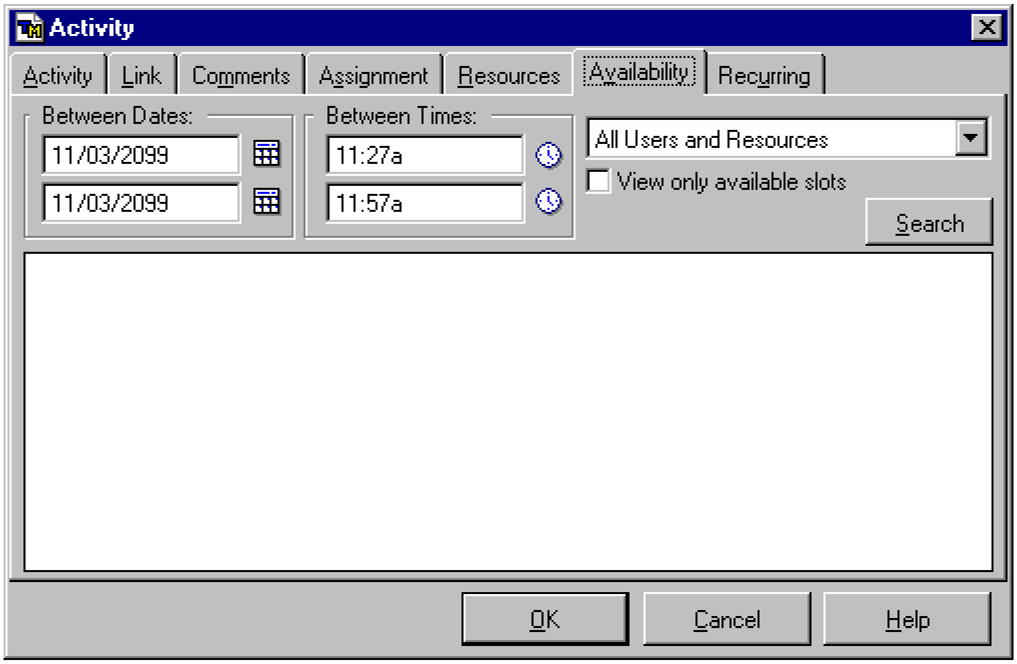
## Report Generator with Title Band (Detail)



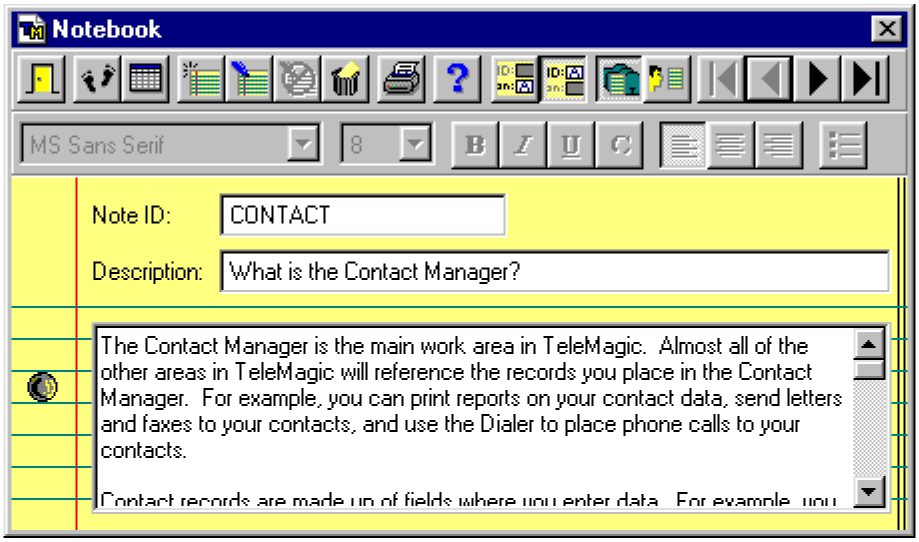
## Activity Dialog Box, Assignment Page



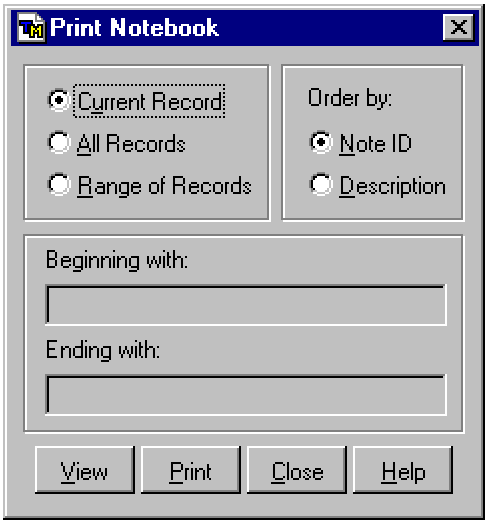
## Activity Dialog Box, Availability Page



## The Notebook

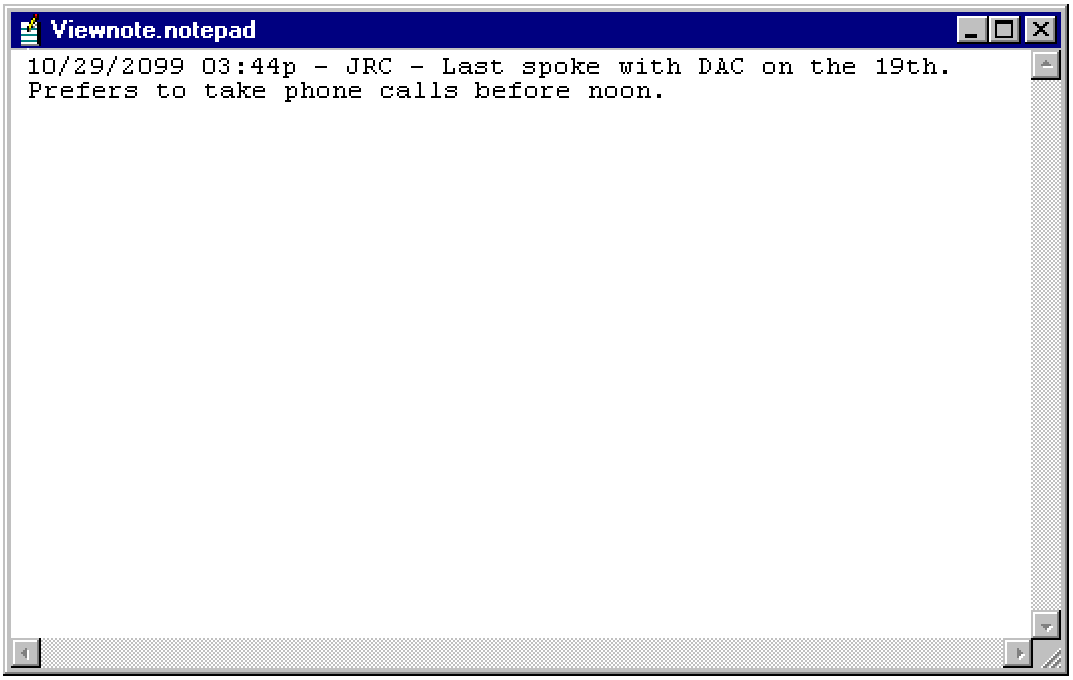


## The Print Notebook Dialog Box

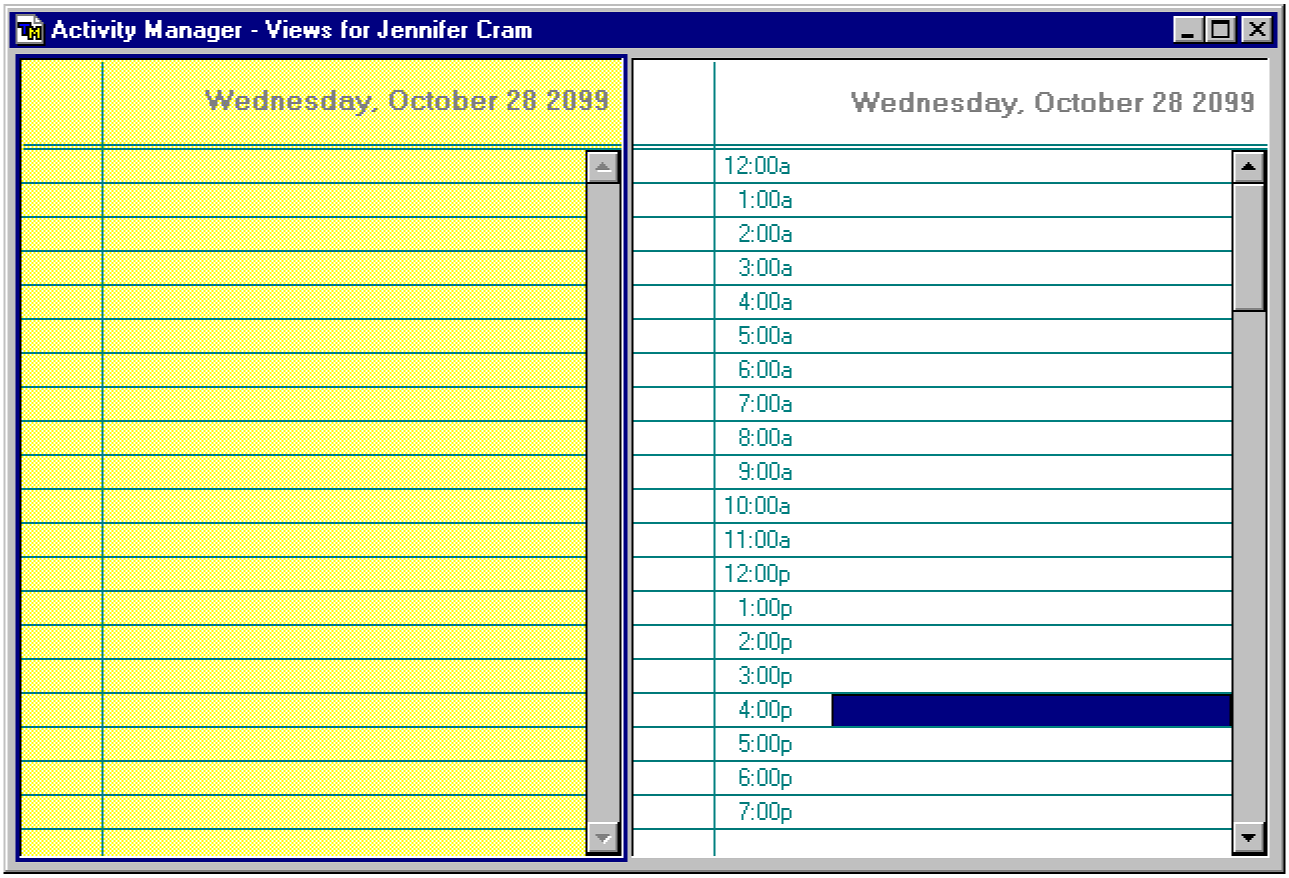


## Go To Notebook Record Dialog Box

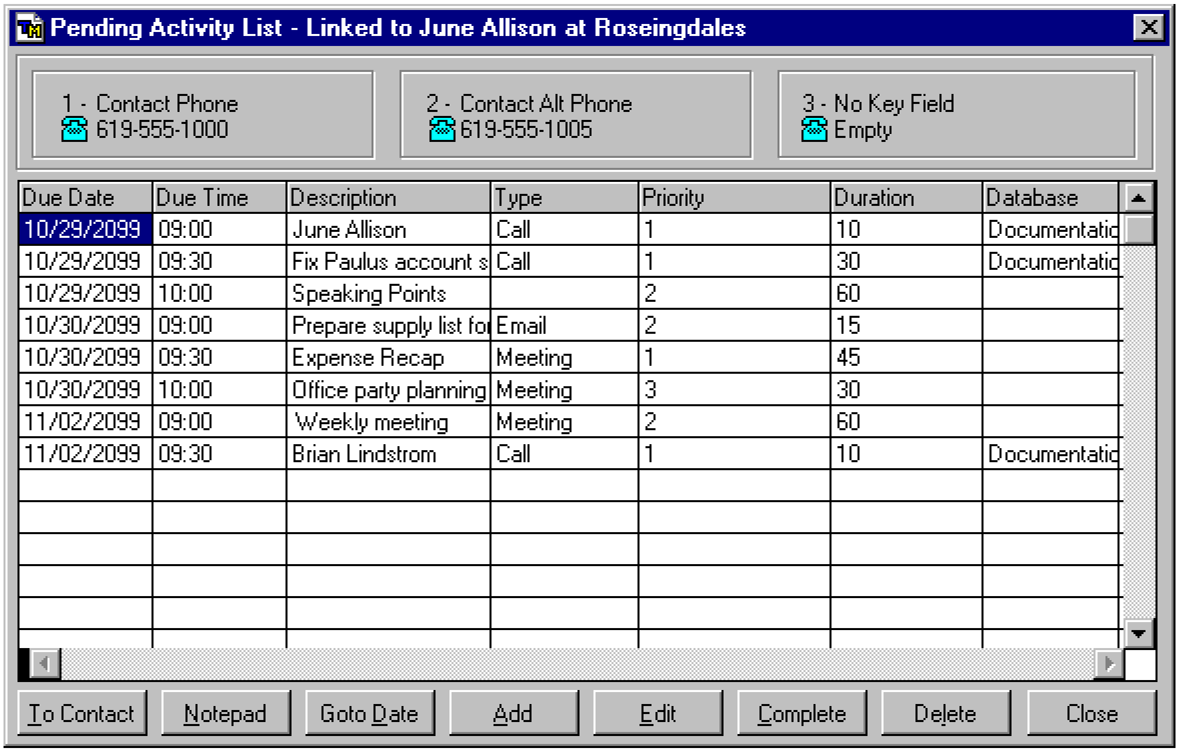
## Notepad, View Only



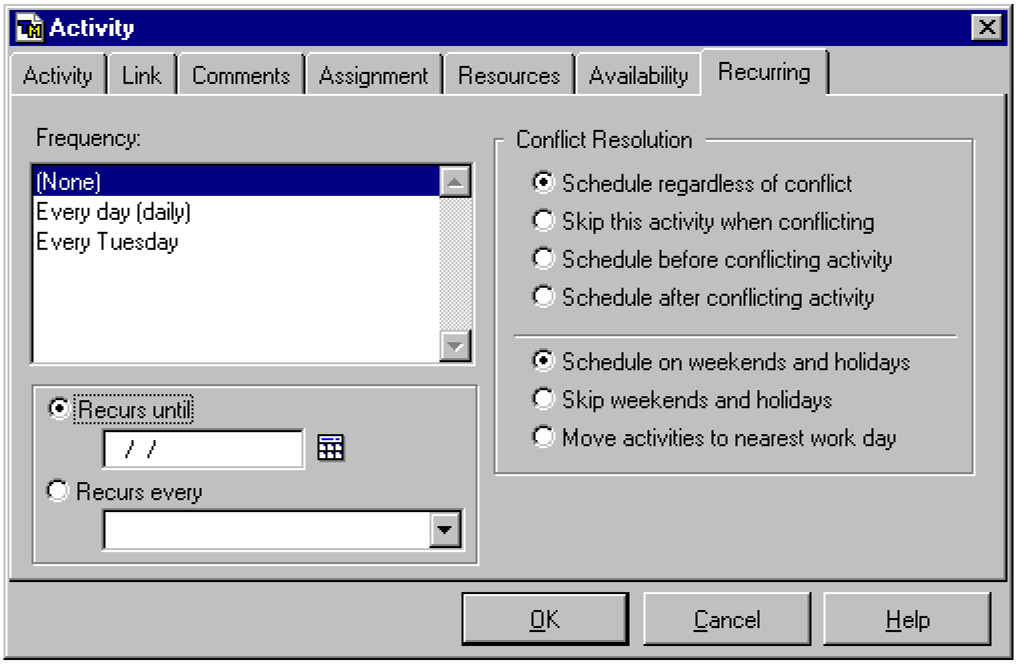
## Activity Manager, Default Configuration



## Pending Activity List

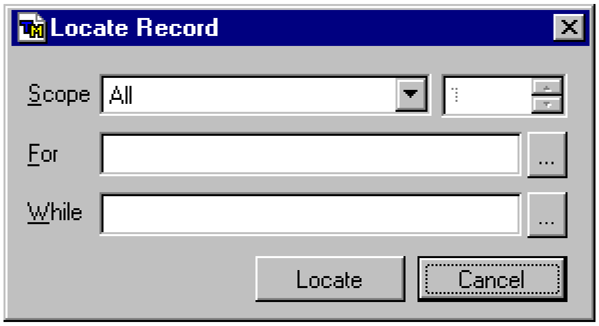


## Activity Dialog Box, Recurring Page

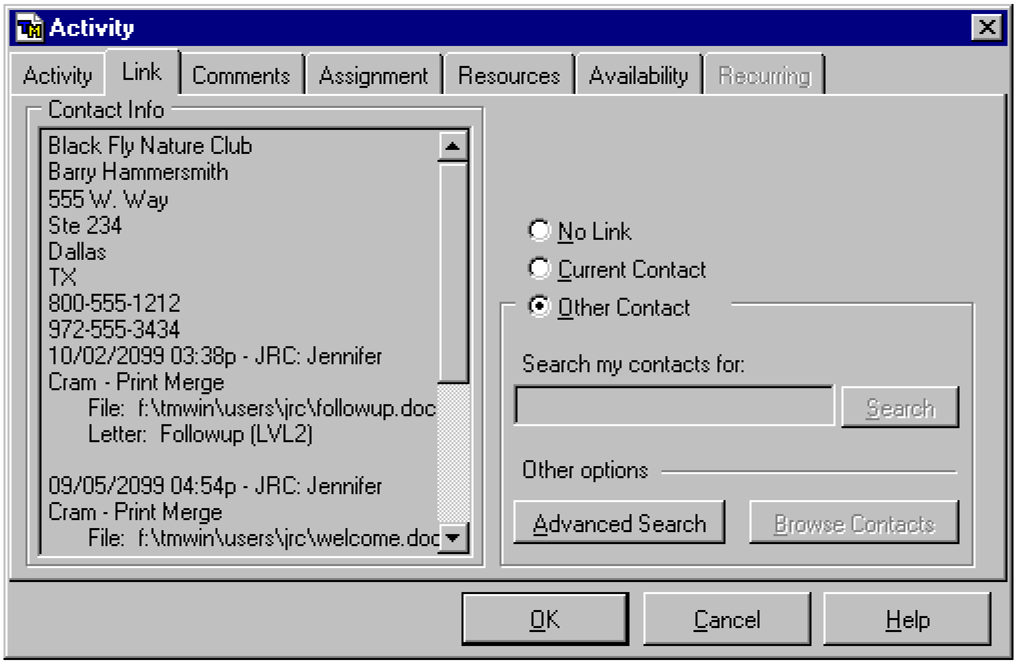


## Go to Record Dialog Box

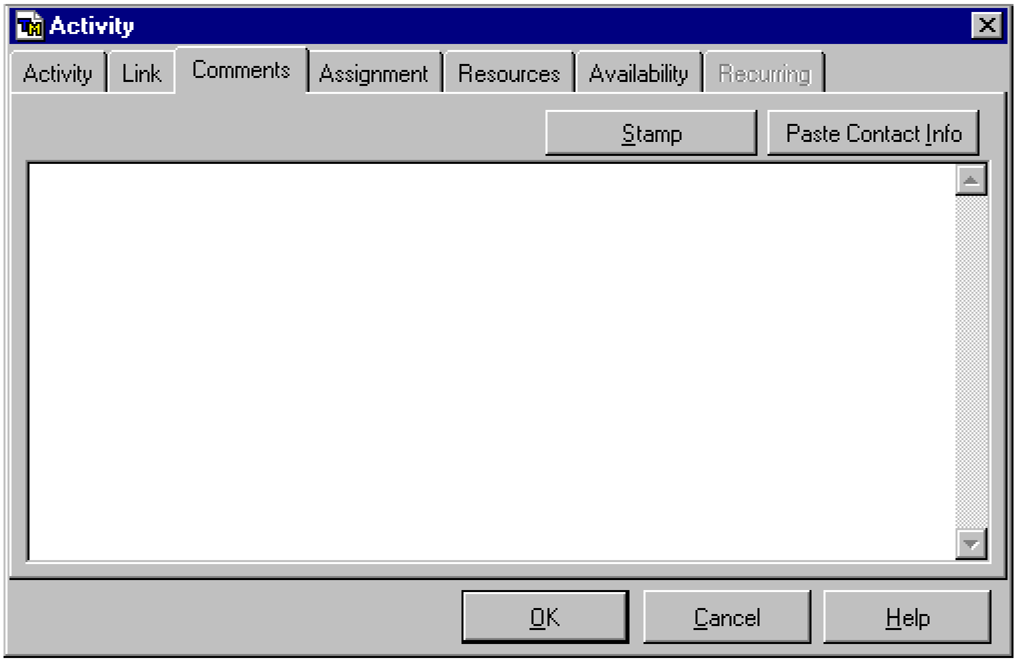
## Locate Record Dialog Box



## Activity Dialog Box, Link Page

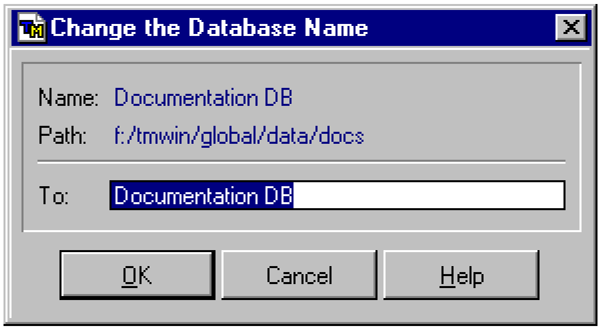


## Activity Dialog Box, Comments Page

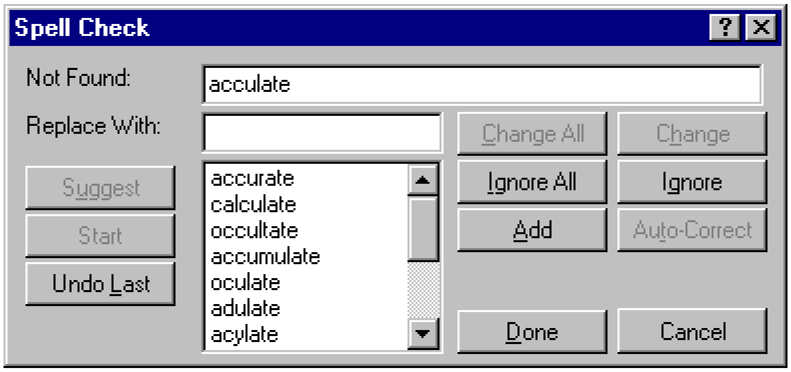


# System Level Security Dialog Box

## Change the Database Name Dialog Box

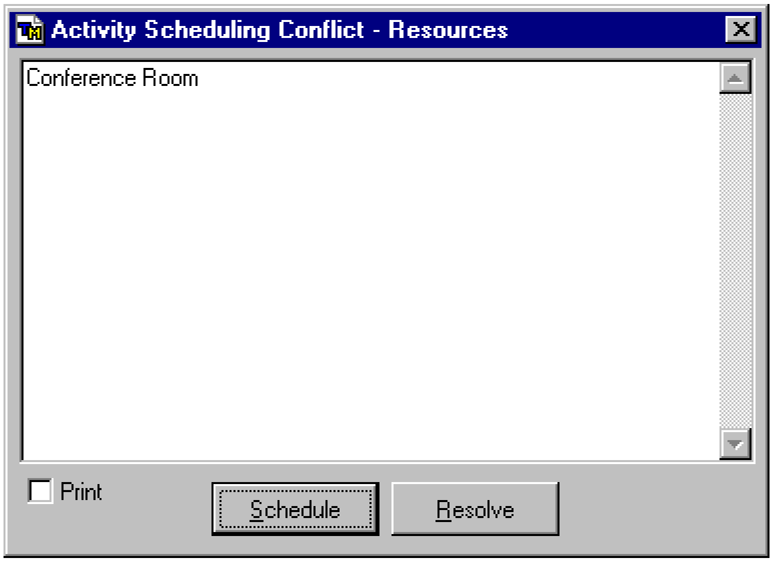


## Spell Checking Dialog Box

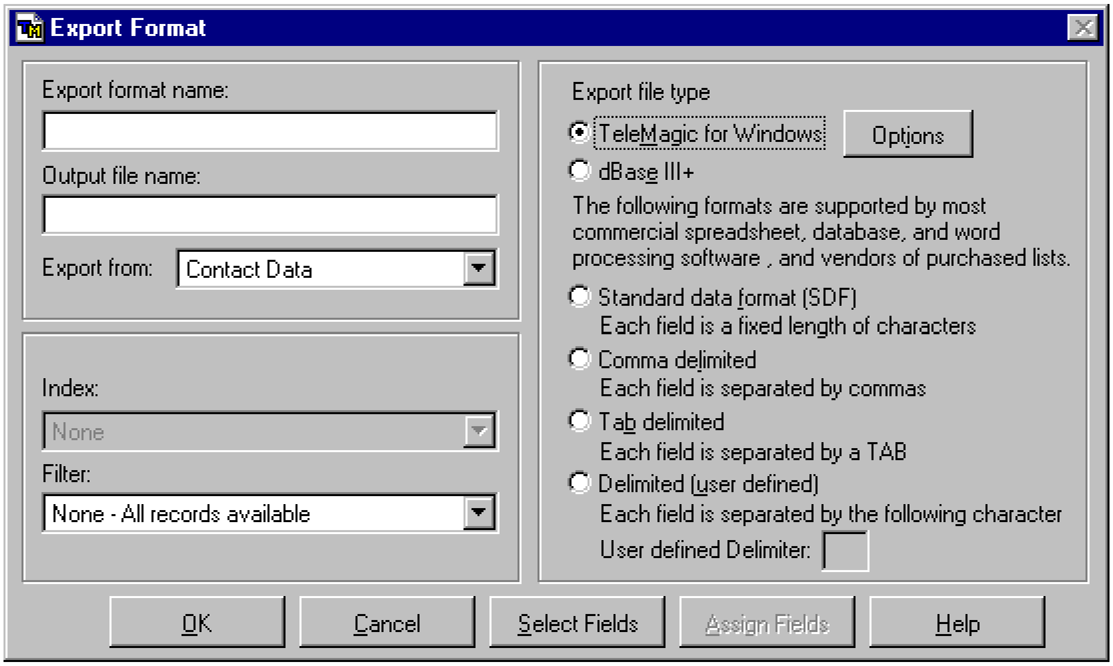


## List Box Report Dialog Box

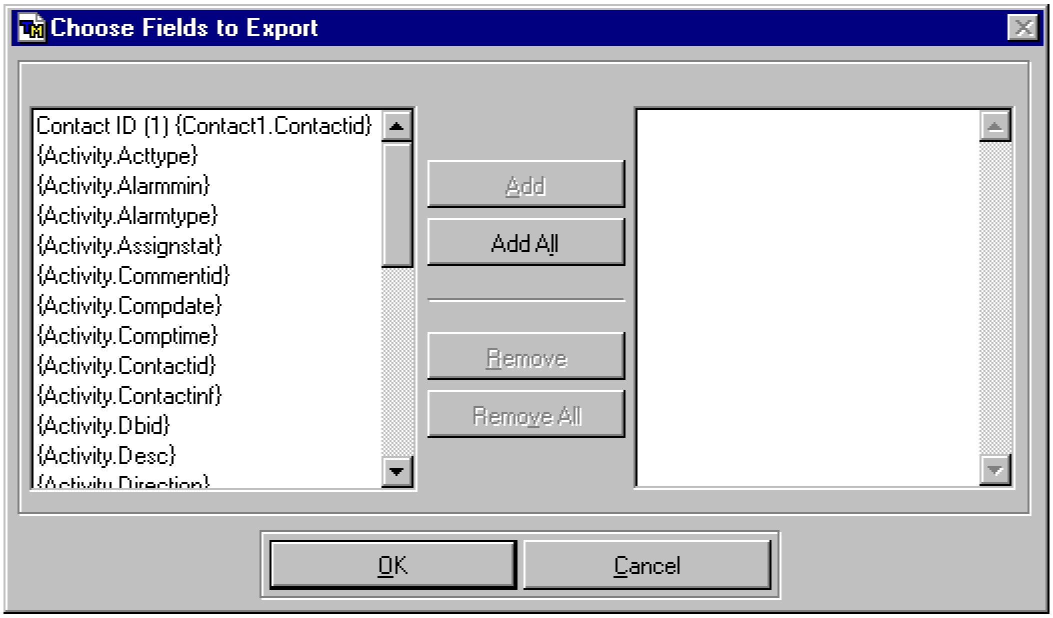
## Activity Scheduling Conflict - Resources Dialog Box



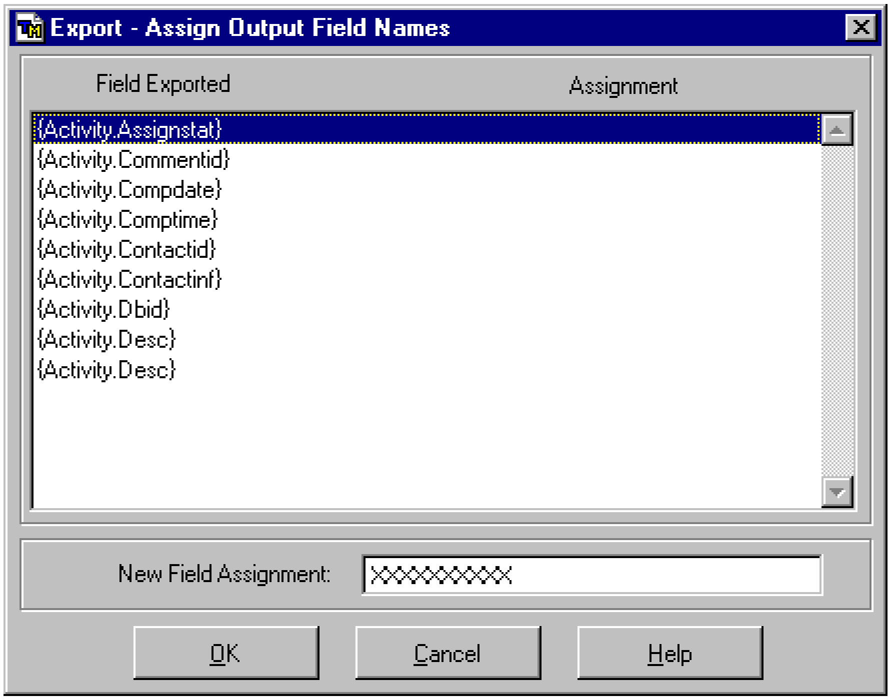
## Export Format Dialog Box



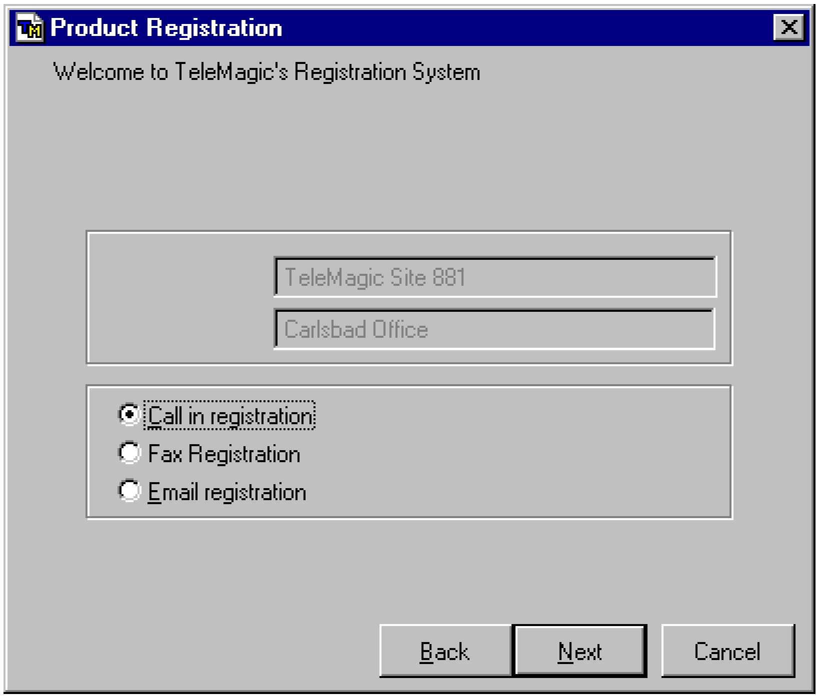
## Choose Fields to Export Dialog Box (Activity Fields)



## Export - Assign Output Field Names

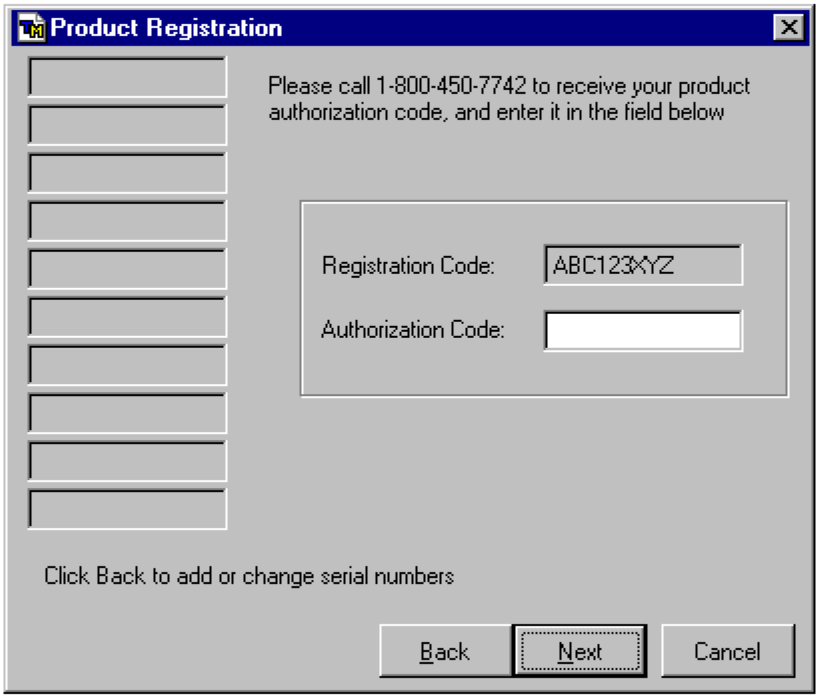


## Product Registration Dialog Box

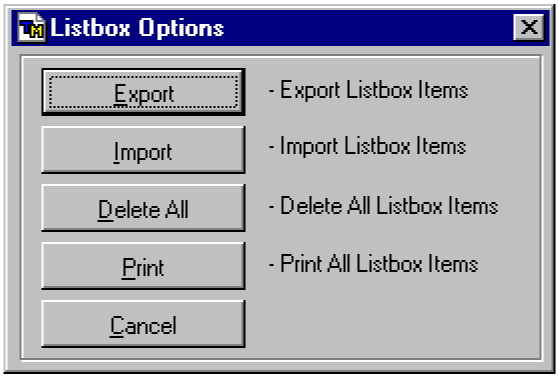


## The Second Product Registration Dialog Box

## The Third Product Registration Screen

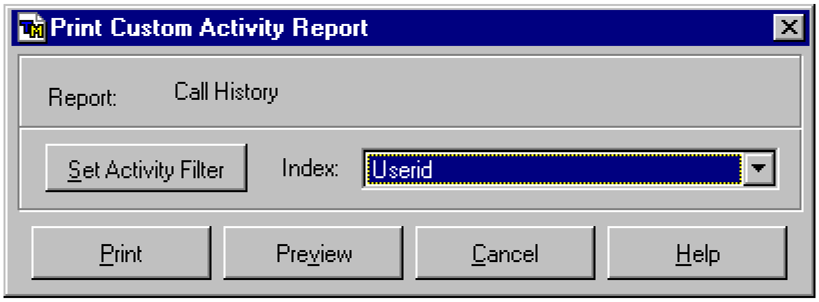


## Listbox Options Dialog Box



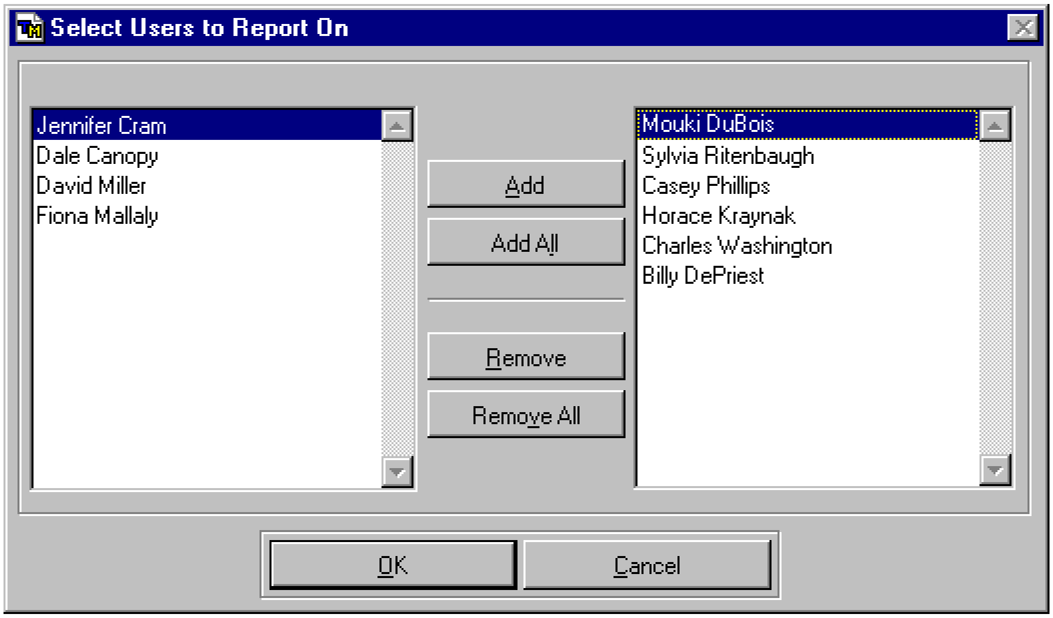
## Database and Field Security Dialog Box

## Print Custom Activity Report Dialog Box



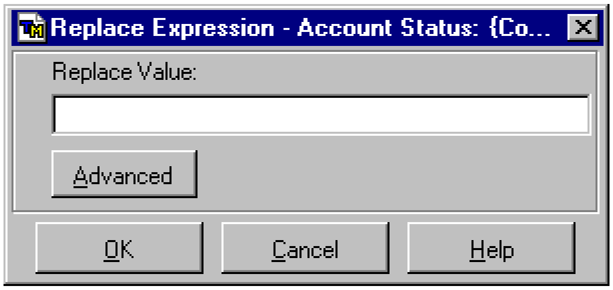
## Error Report Dialog Box

## Select Users to Report On Dialog Box

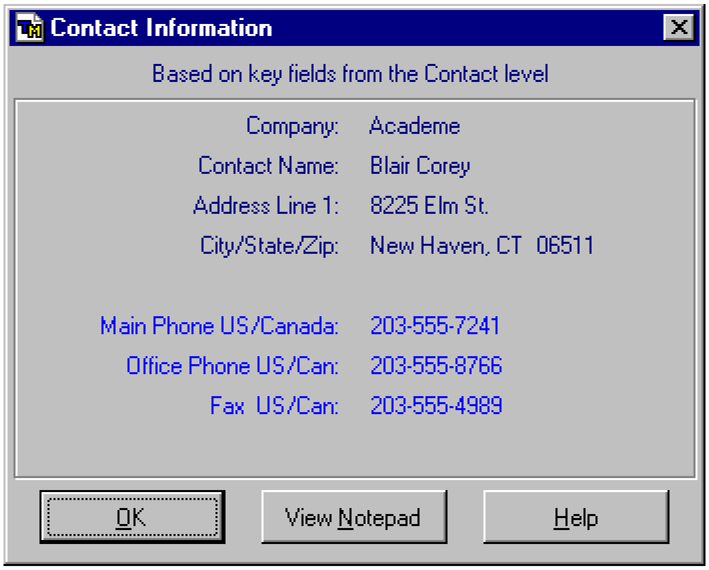


## Select a Level for Replace Dialog Box

## Replace Expression Dialog Box



## Contact Information Screen

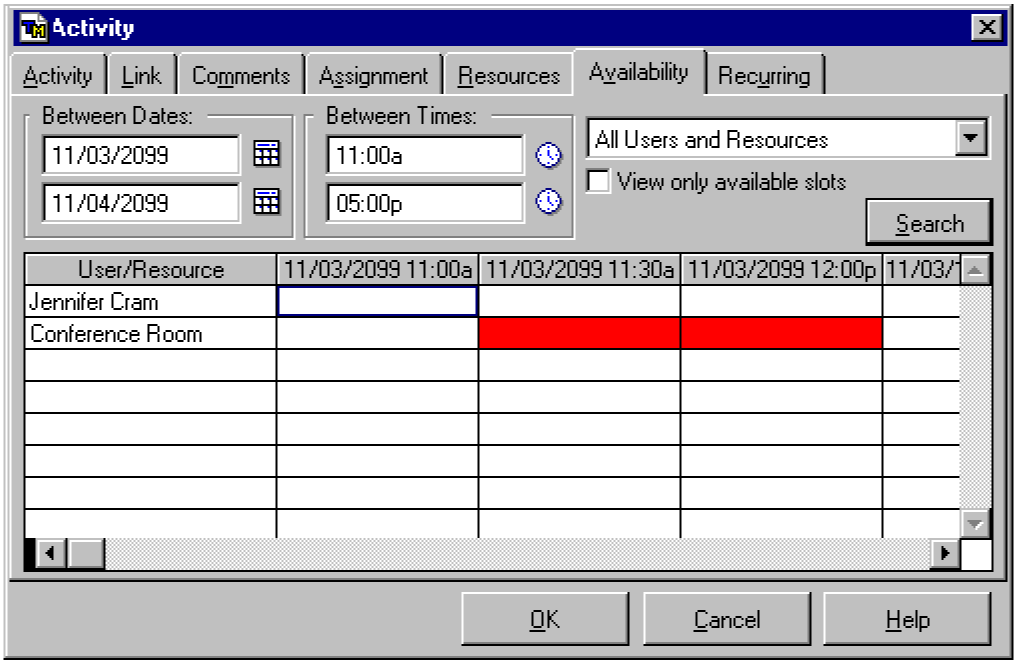


## View Notepad Window ( view-only )

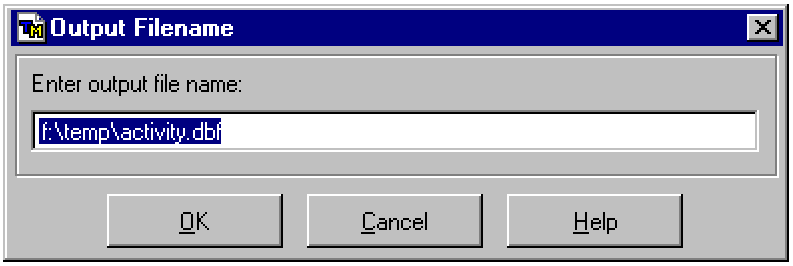
Viewnote.notepad

```
08/20/2099 4:42p - TST - Out,    6.43, Status: Completed - Call
to Verify our July Meeting Notes
Says the minutes I Faxed last week were accurate; will
consider backdating the contract to the verbal commitment
date we discussed.
```

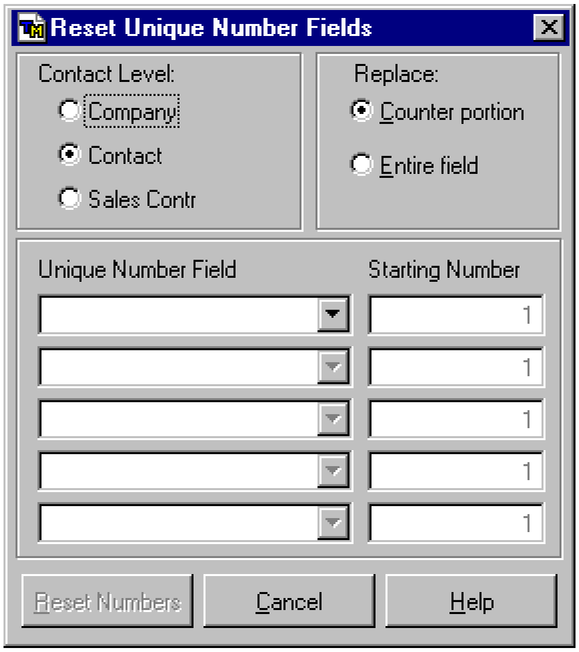
## Activity Dialog Box, Availability Page with Results



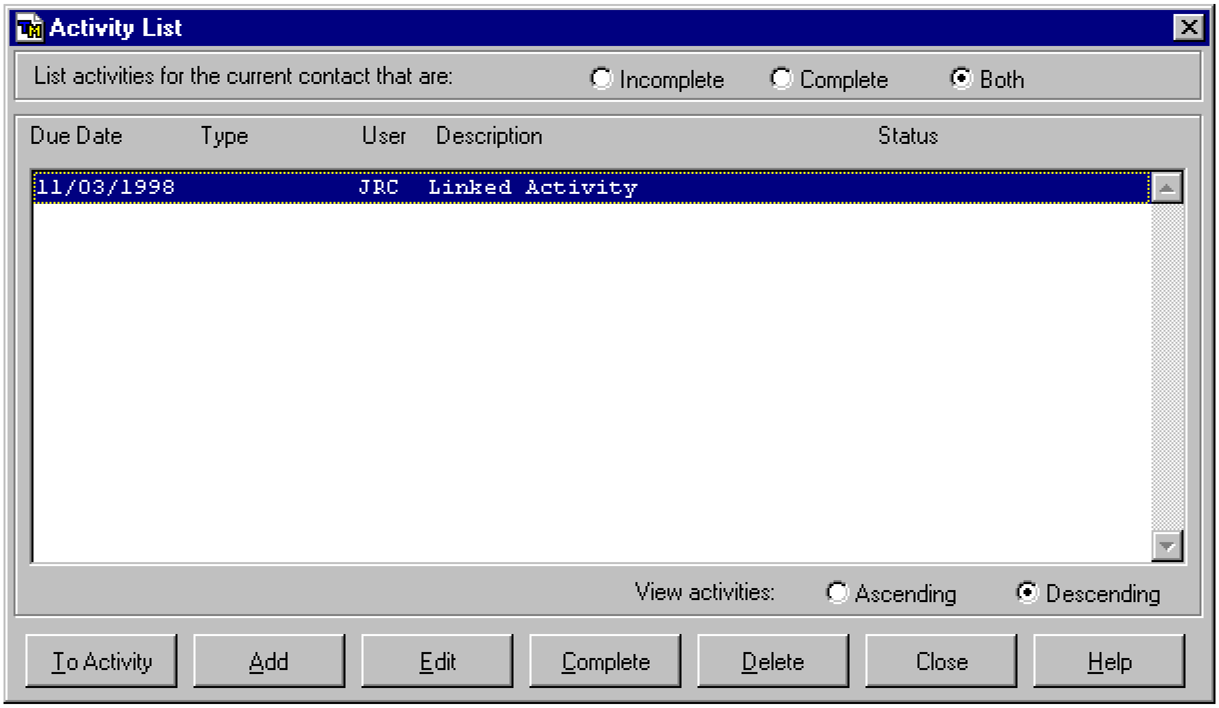
## Output Filename Dialog Box



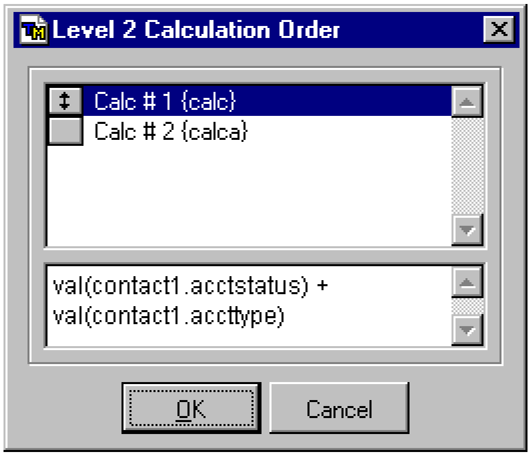
## Reset Unique Number Fields Dialog Box



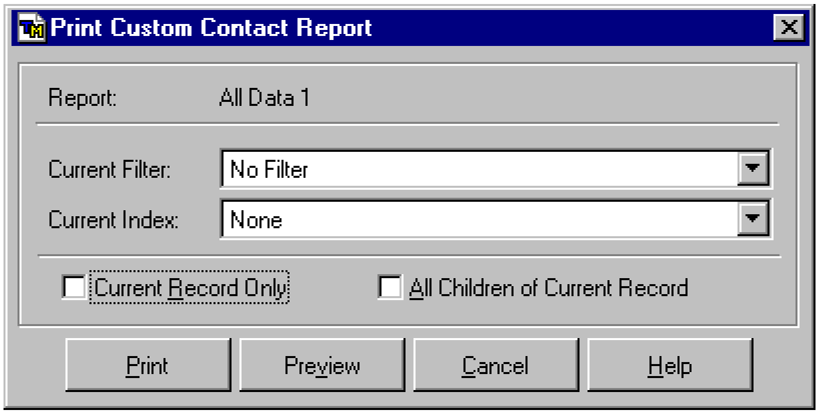
## Activity List Dialog Box



## Calculation Order Dialog Box

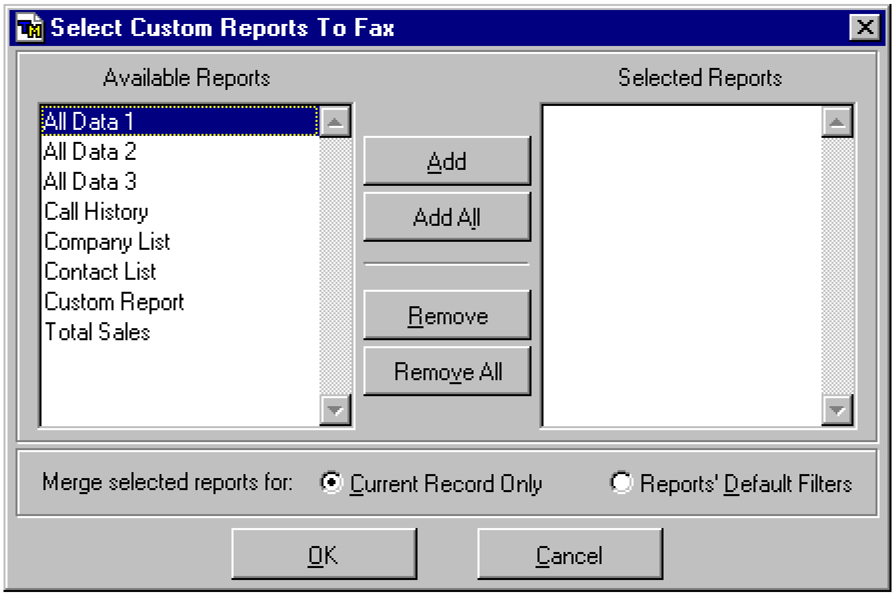


## Print Custom Contact Report Dialog Box

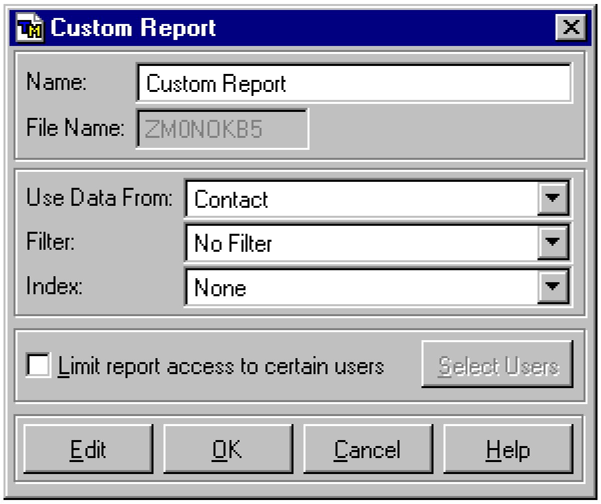


## Print Quick List Dialog Box

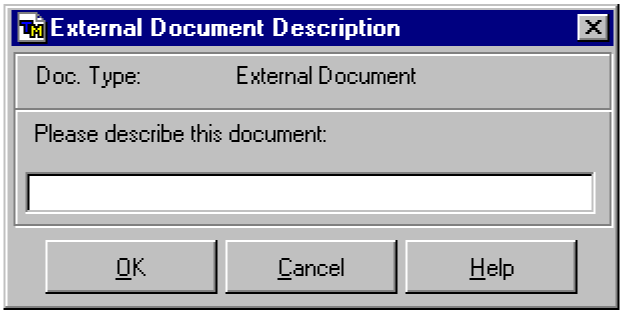
## Select Custom Reports to Fax Dialog Box



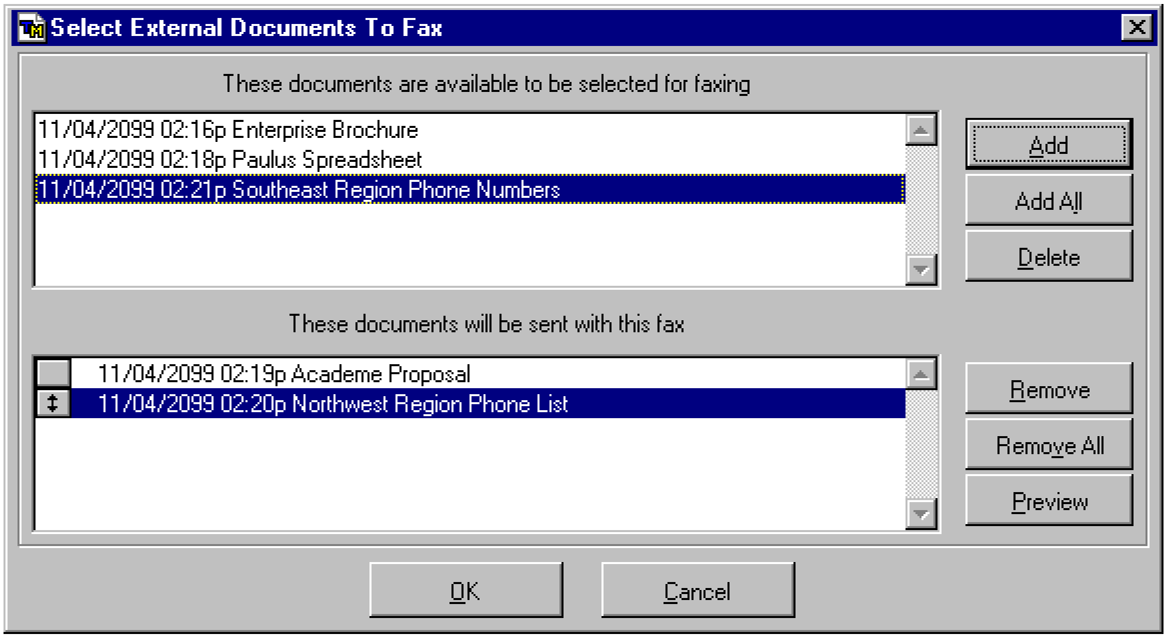
## Custom Report Dialog Box



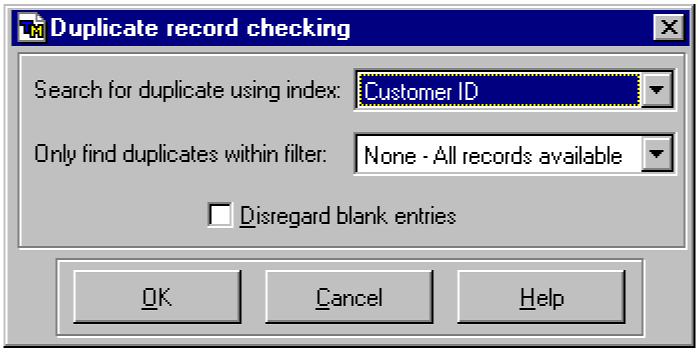
## External Document Description Dialog Box



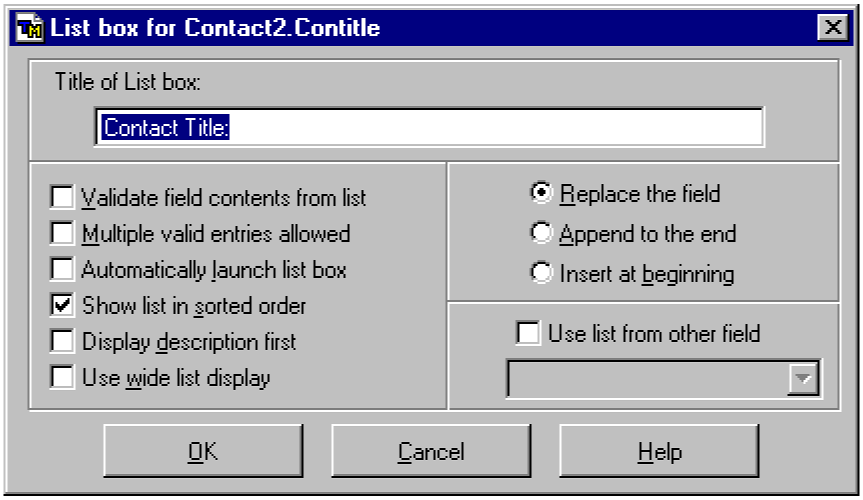
## Select External Documents to Fax



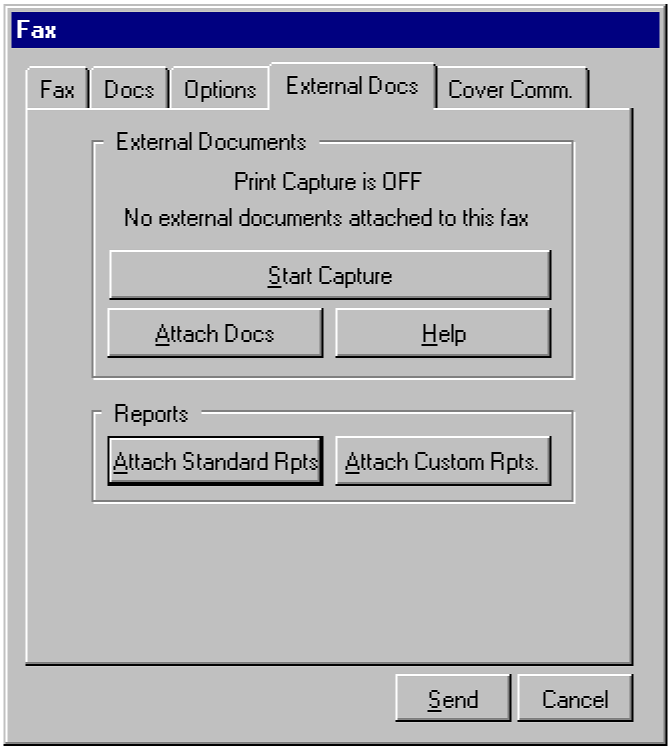
## Duplicate Record Checking Dialog Box



## List Box Configuration Dialog Box



## Fax Dialog Box, External Docs Page



## Select Standard Reports to Fax

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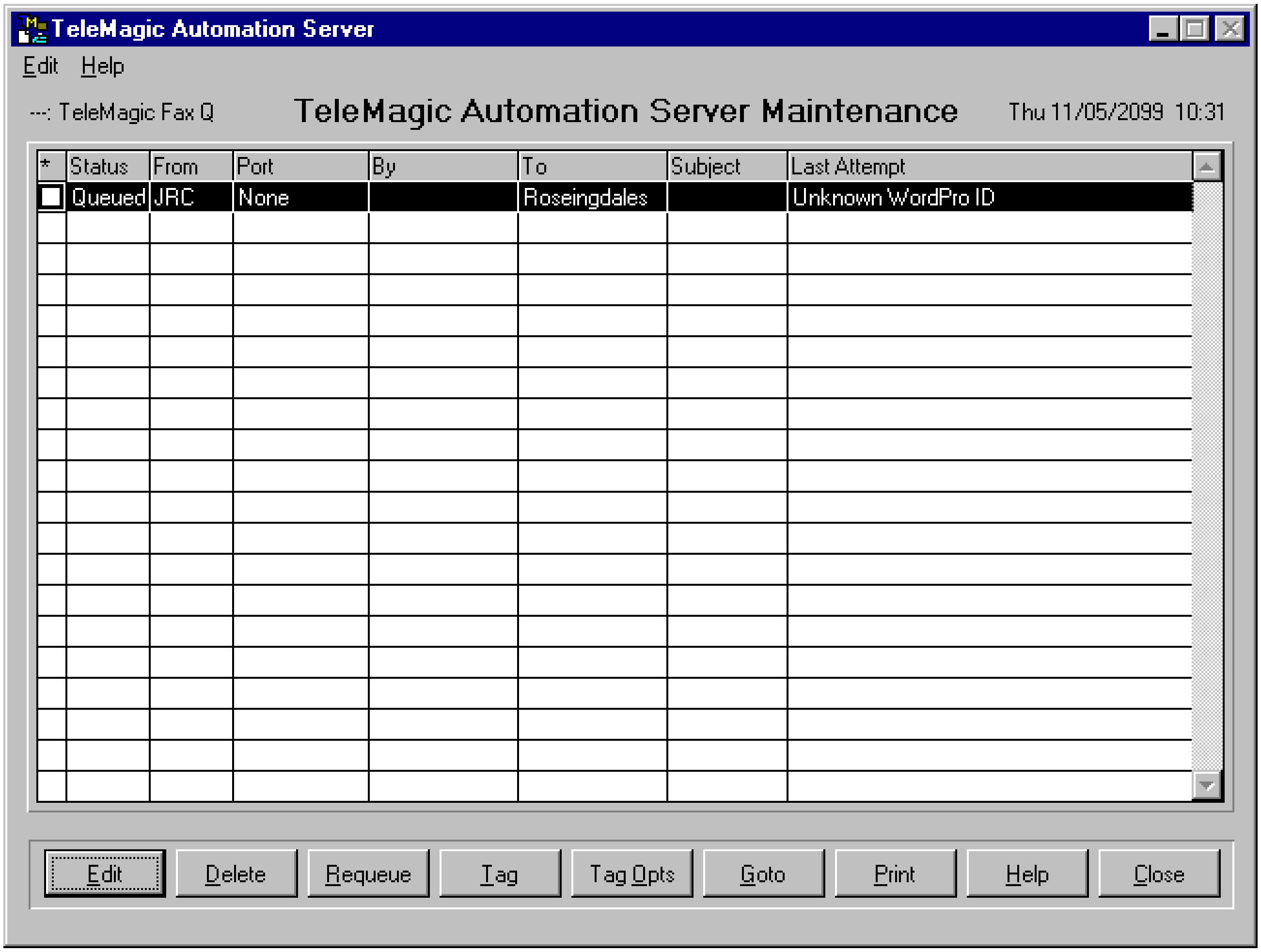
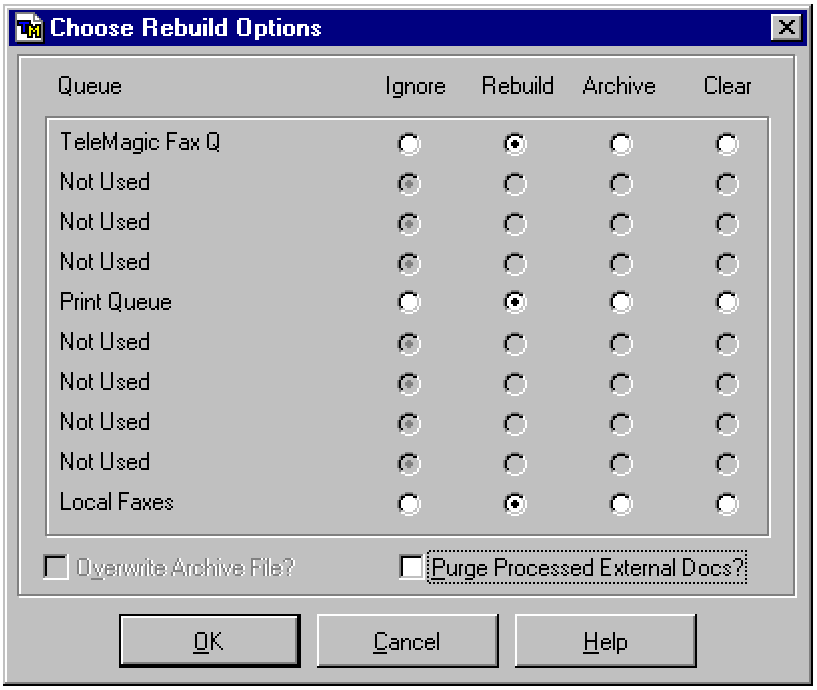
## TeleMagic Automation Server Maintenance Screen

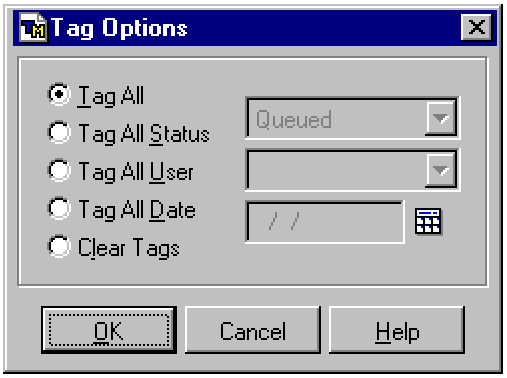


## Requeue Entries Dialog Box

## Choose Rebuild Options Dialog Box

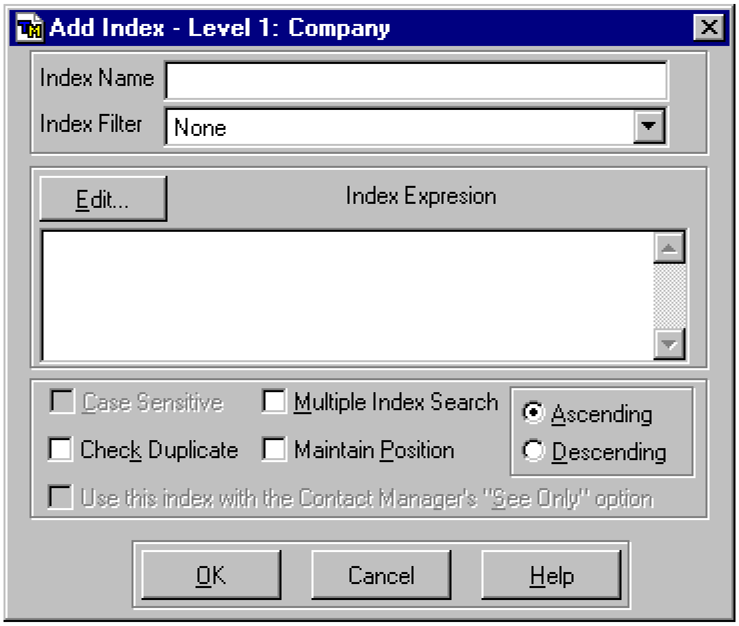


## Tag Options Dialog Box

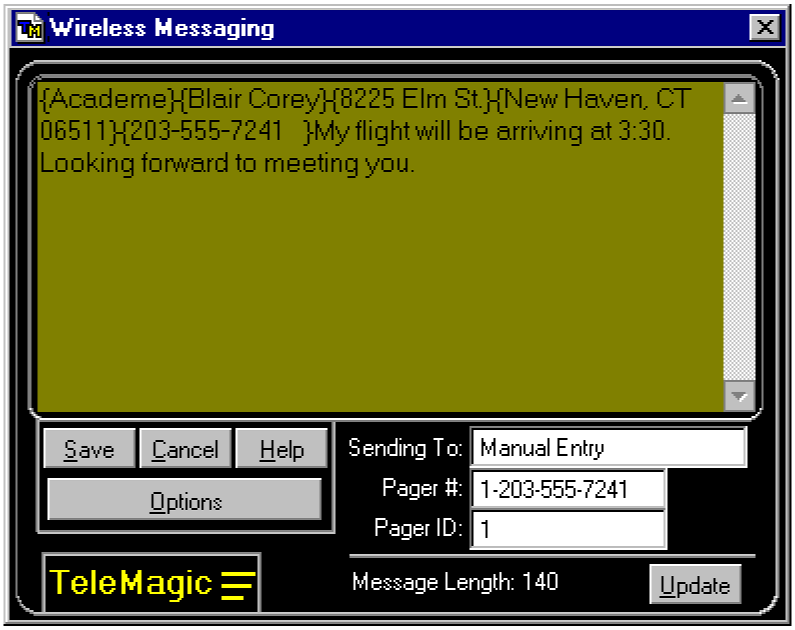


## Select a Level to Index Dialog Box

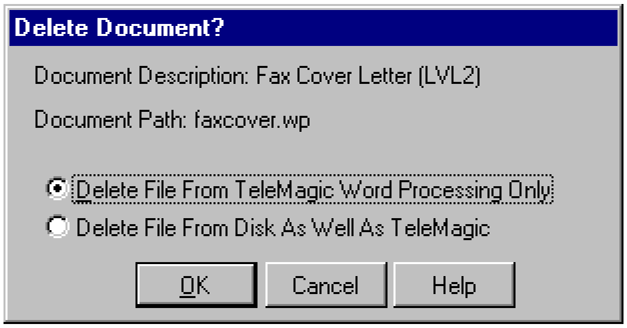
## Add Index Dialog Box



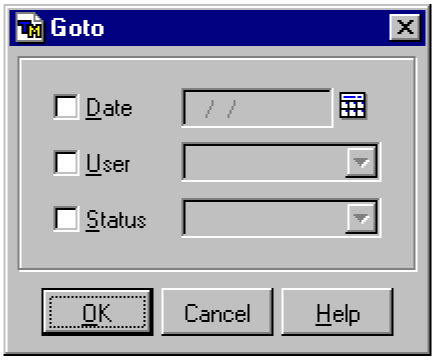
## Wireless Messaging Edit Dialog Box



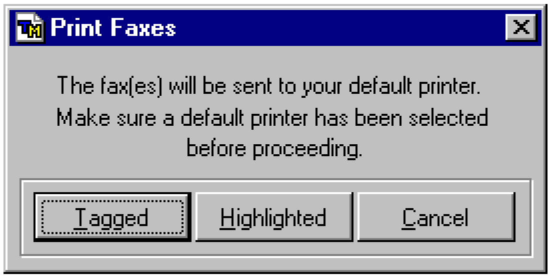
## Delete Document? Dialog Box



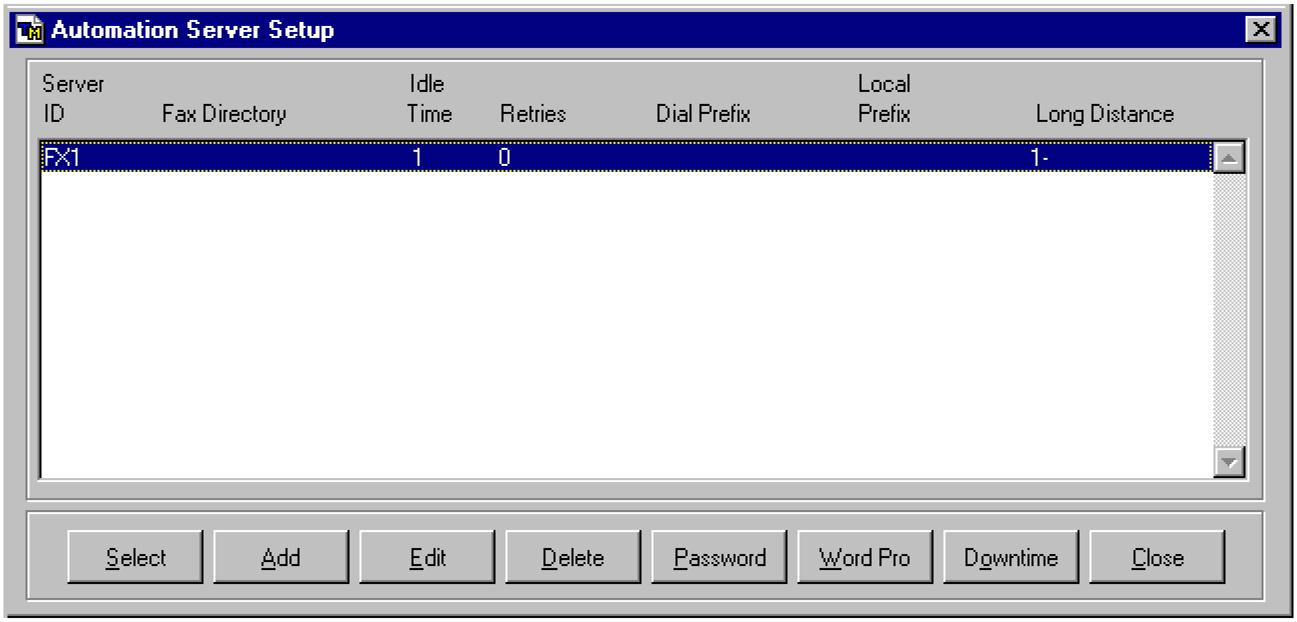
## Automation Server Goto Dialog Box



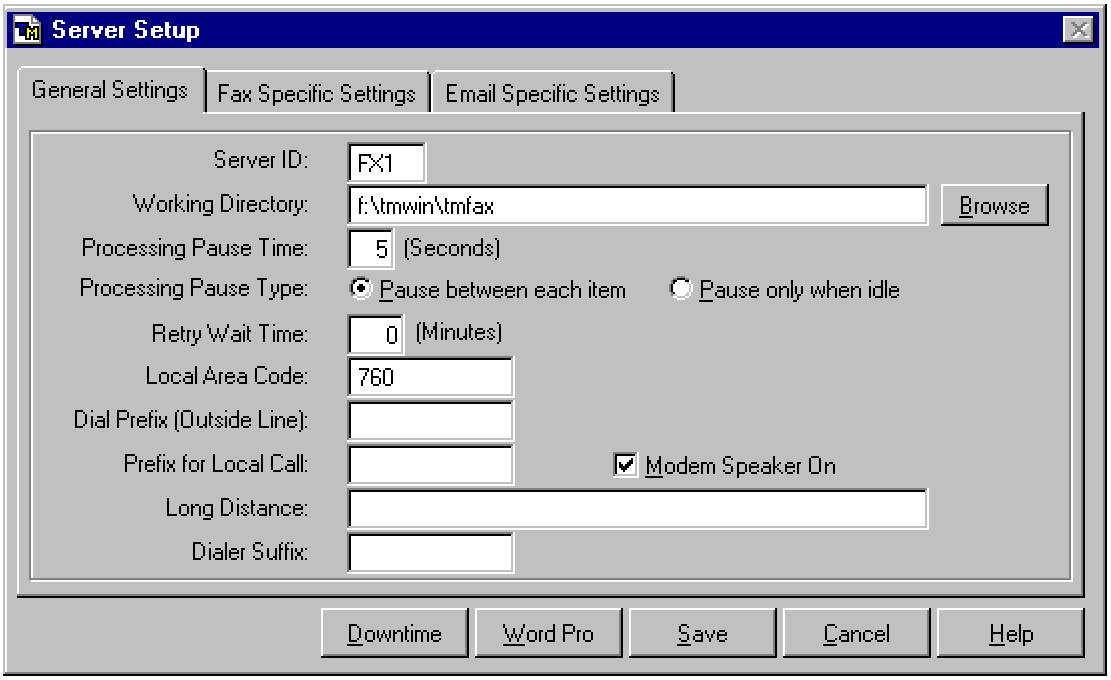
## Print Faxes Dialog Box



## Automation Server Setup Screen



## Server Setup Dialog Box

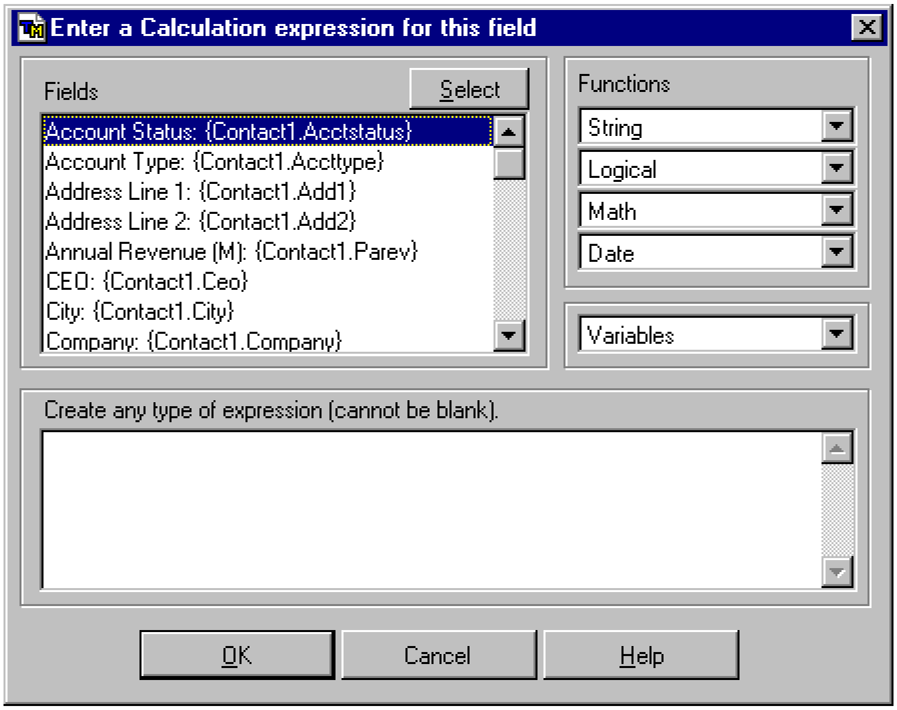


## Server Setup Dialog Box, Fax Specific Settings Page

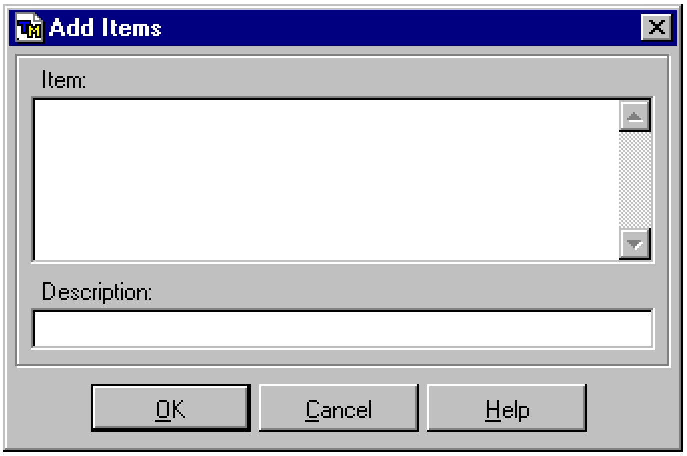
-

## Wireless Messaging Dialog Box

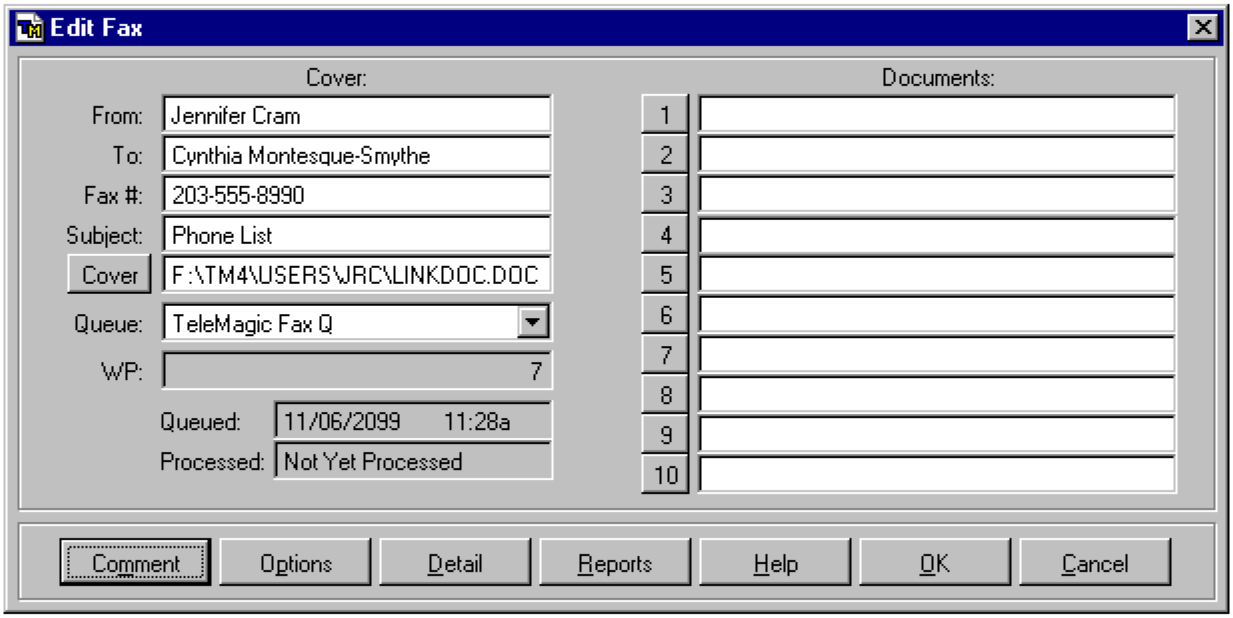
## Enter a Calculation Expression for this Field Dialog Box



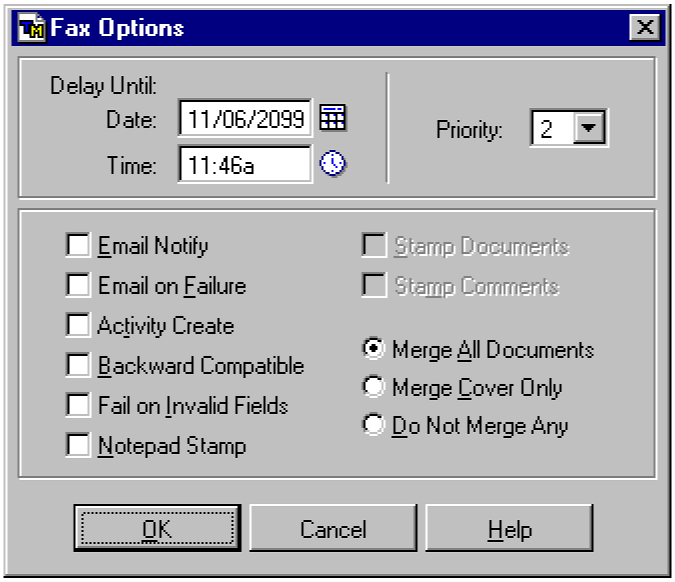
## Add Items Dialog Box



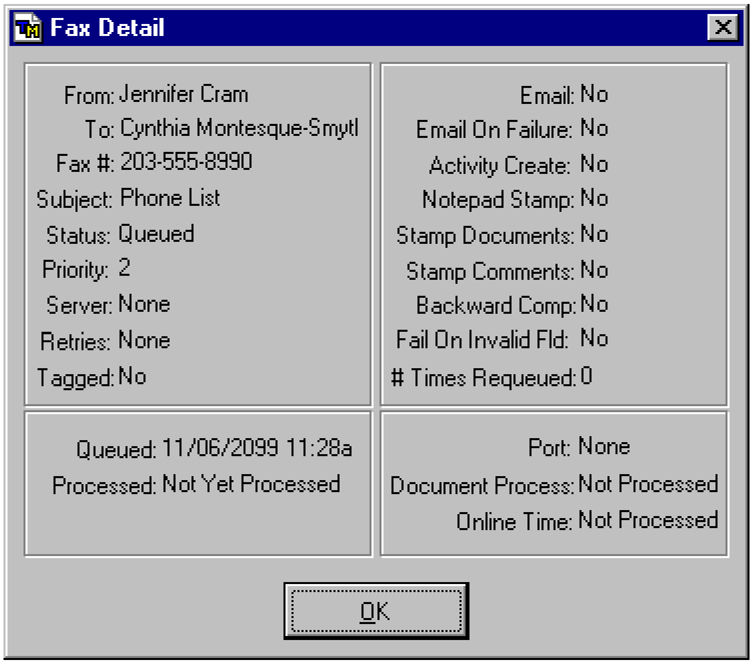
## Edit Fax Dialog Box



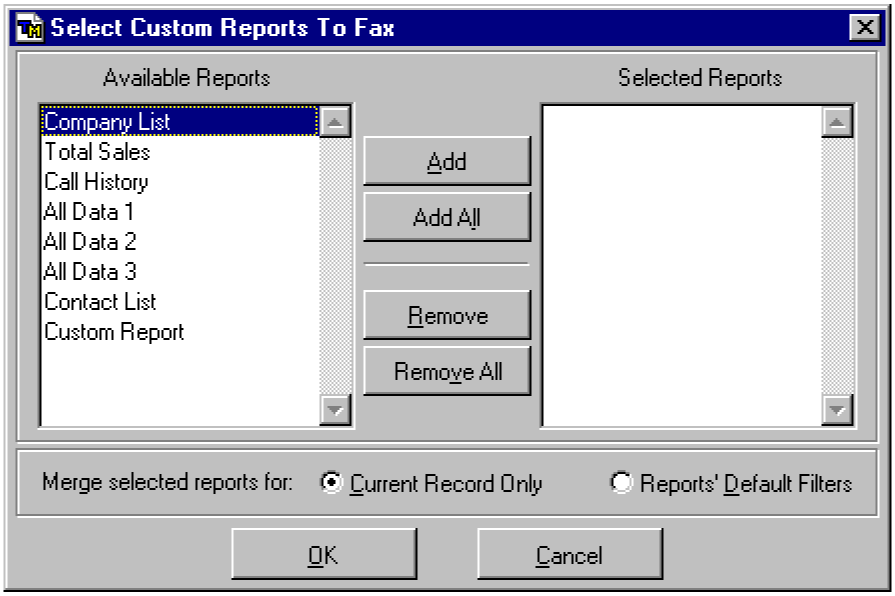
## Fax Option Dialog Box



## Fax Detail Screen

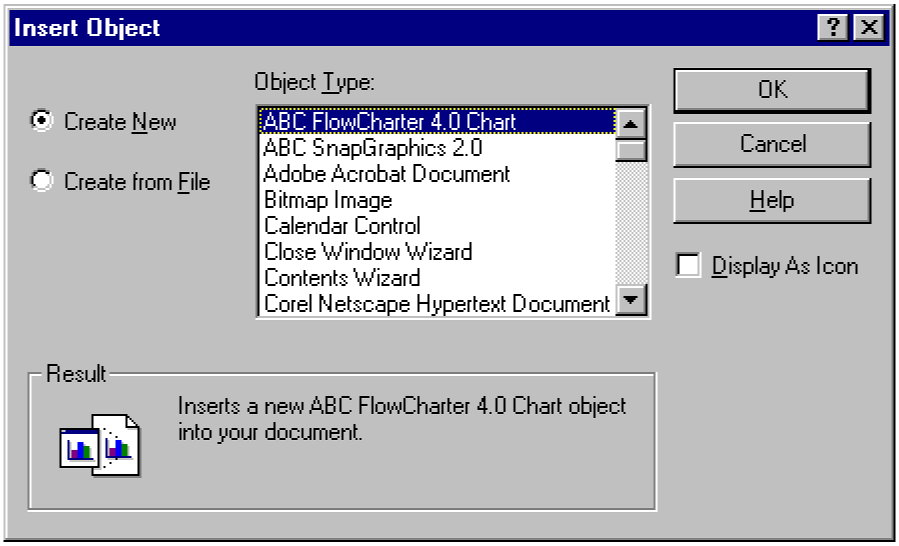


## Select Custom Reports to Fax



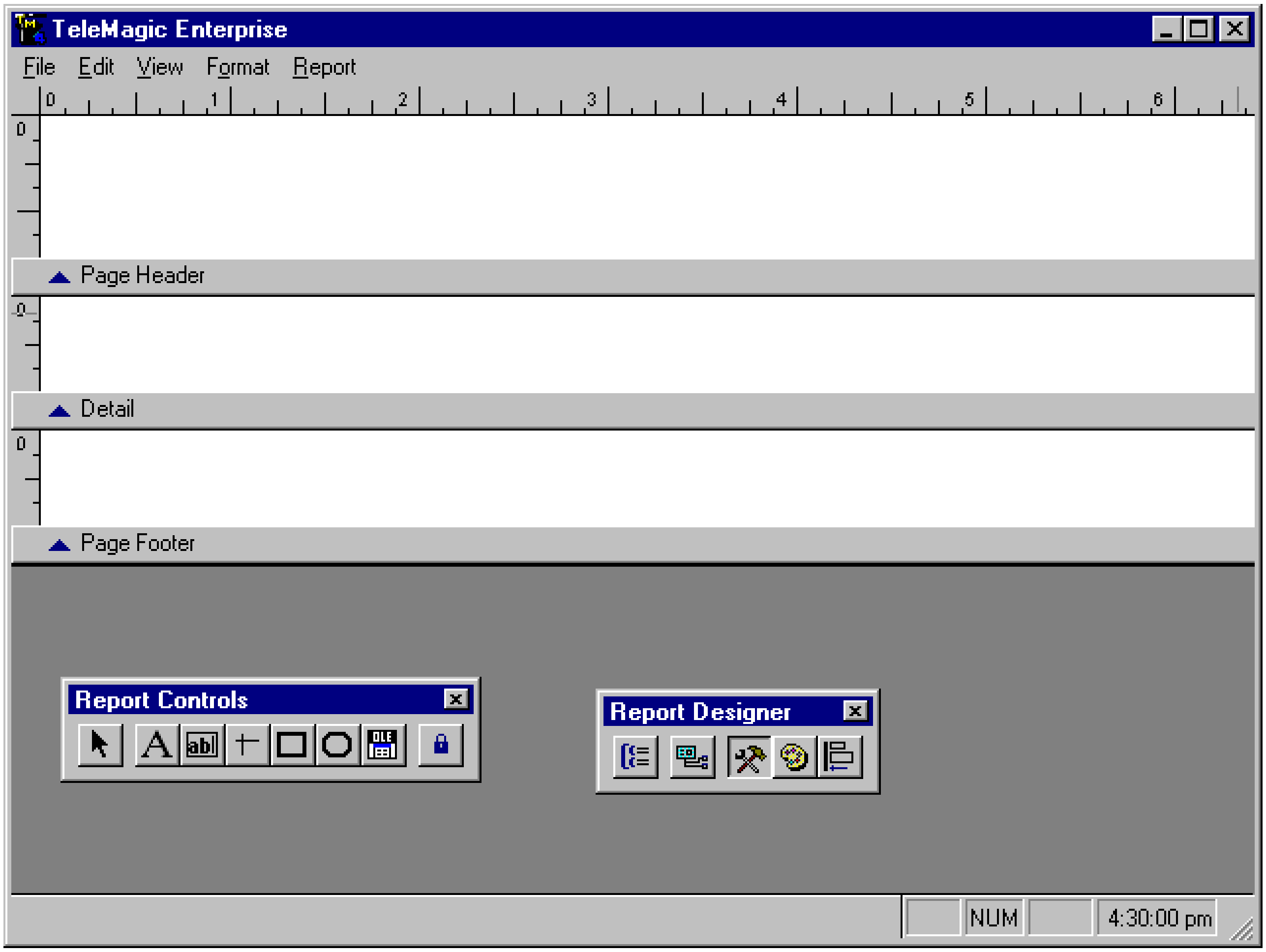
## Delete Faxes Dialog Box

## Insert Object Dialog Box



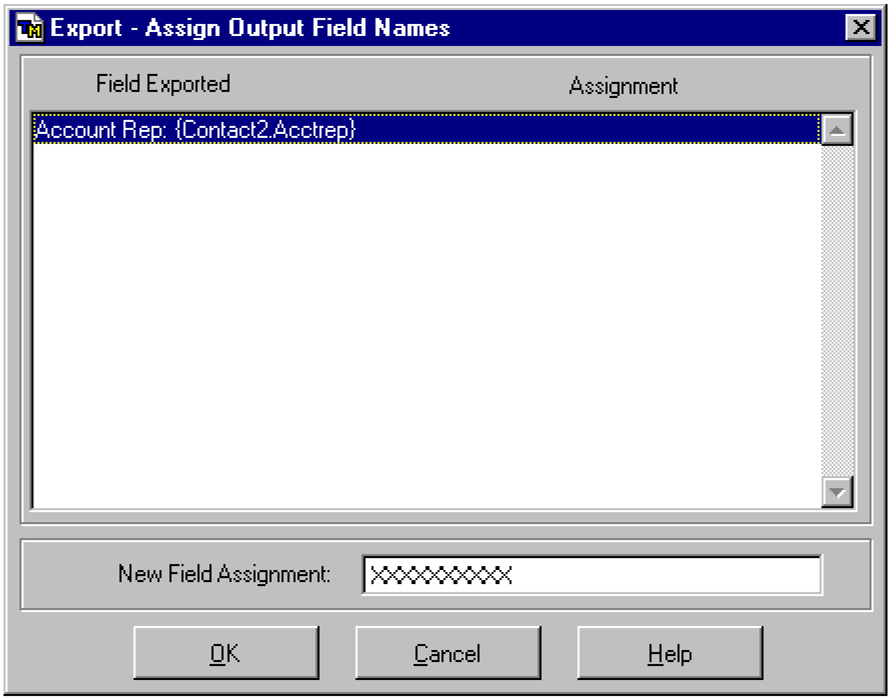

Your available object types will probably differ.

## Report Generator

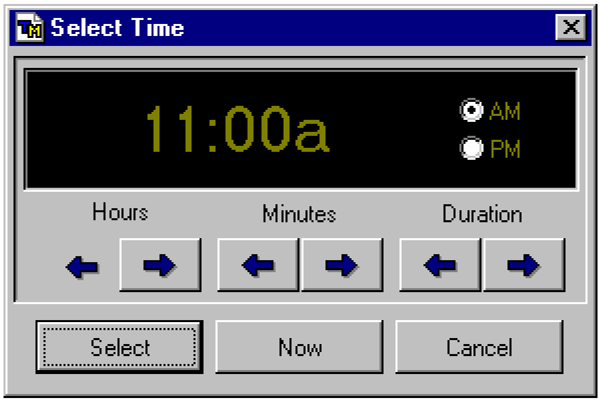



This illustration is shown reduced for clarity.
The toolbars are dockable and will appear elsewhere on your system.

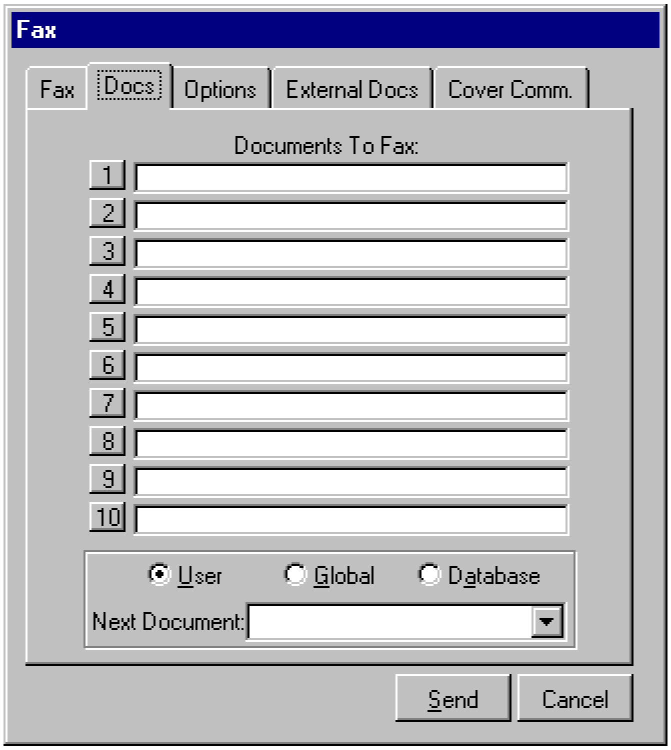
## Export - Assign Output Field Names Dialog Box



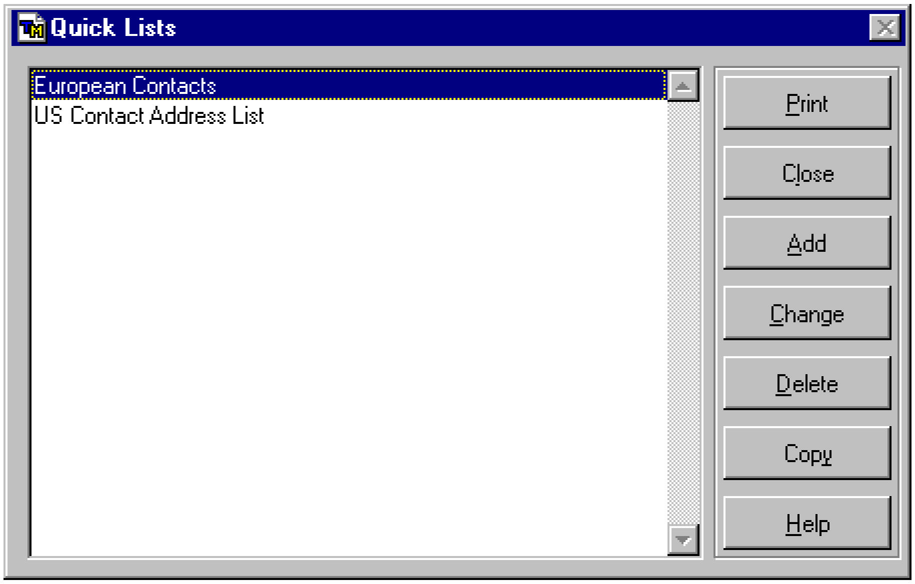
## Select Time Dialog Box



## Fax Dialog Box, Docs Page

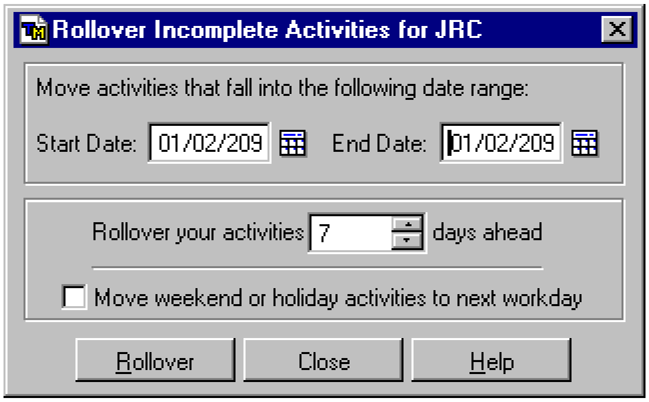


## Quick Lists Dialog Box

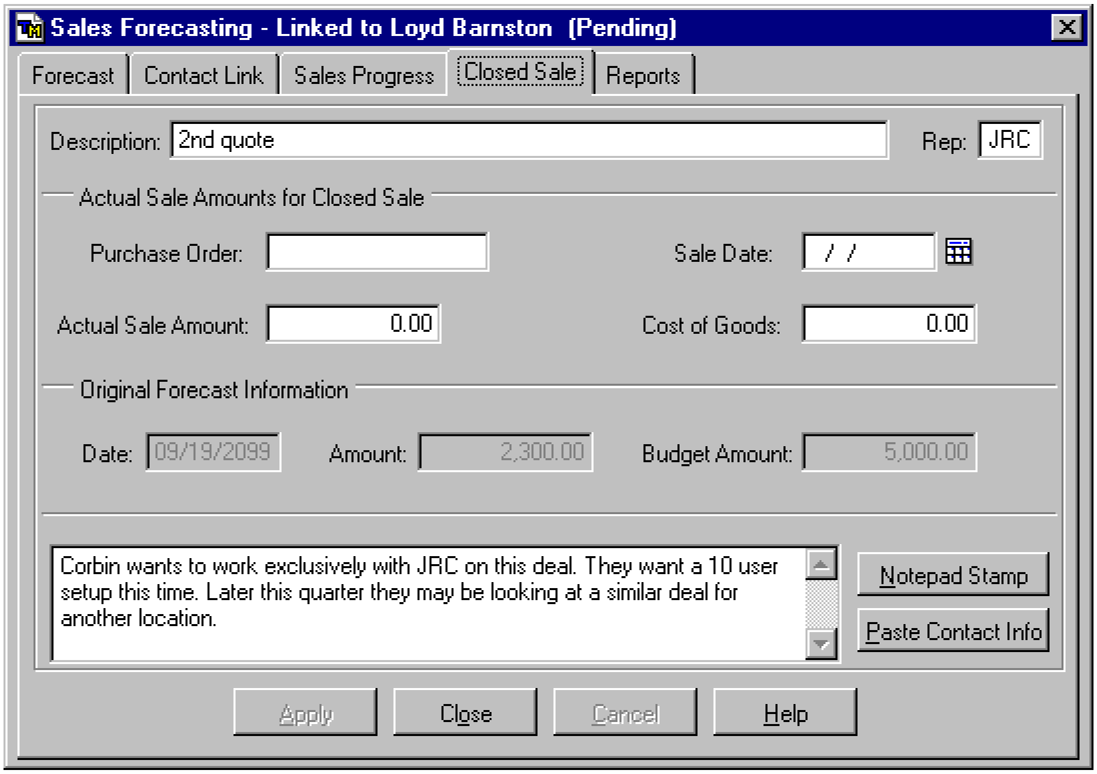


## Select a Level to Browse

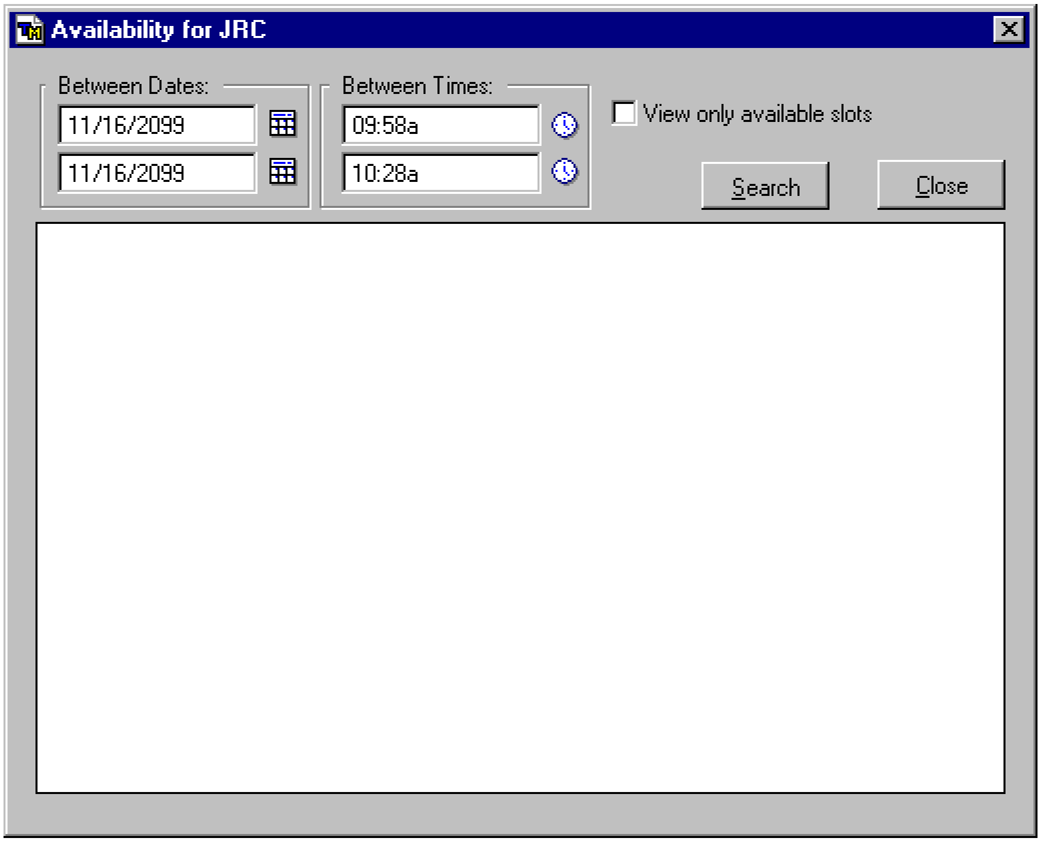
## Rollover Incomplete Activities Dialog Box



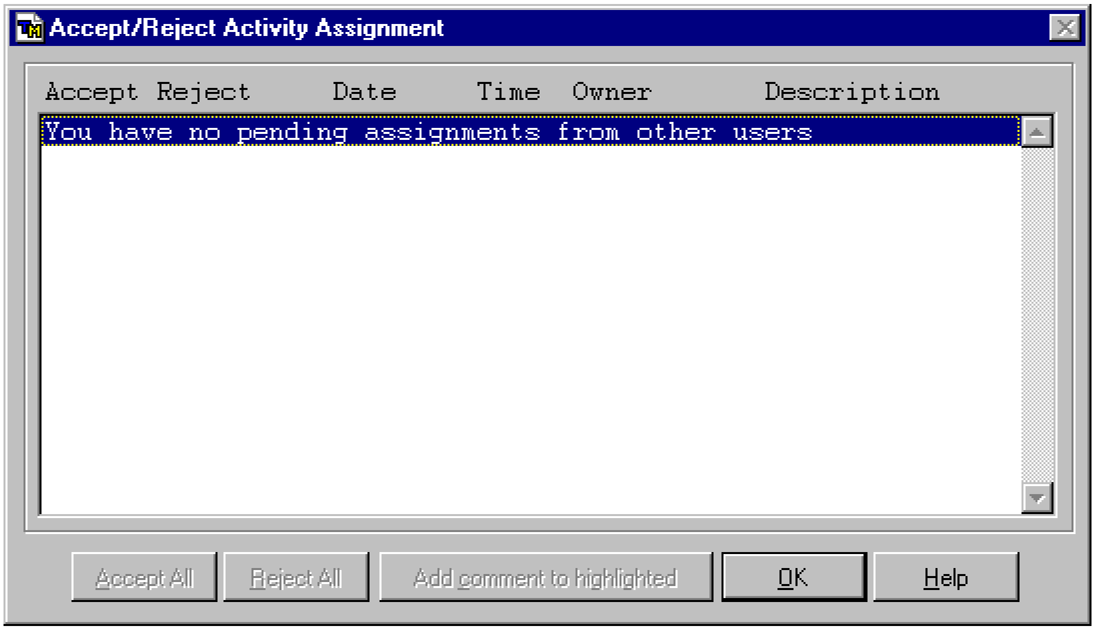
## Sales Forecasting - Closed Sale Page



## Availability Dialog Box



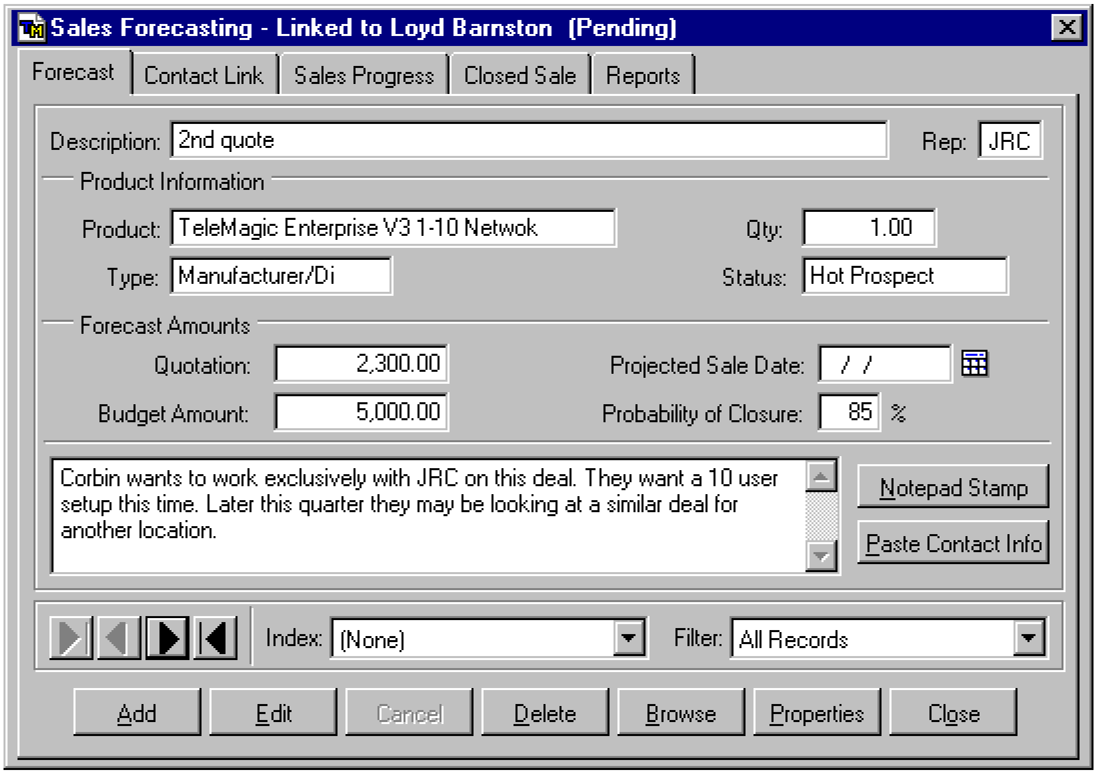
## Accept/Reject Activity Assignment Dialog Box



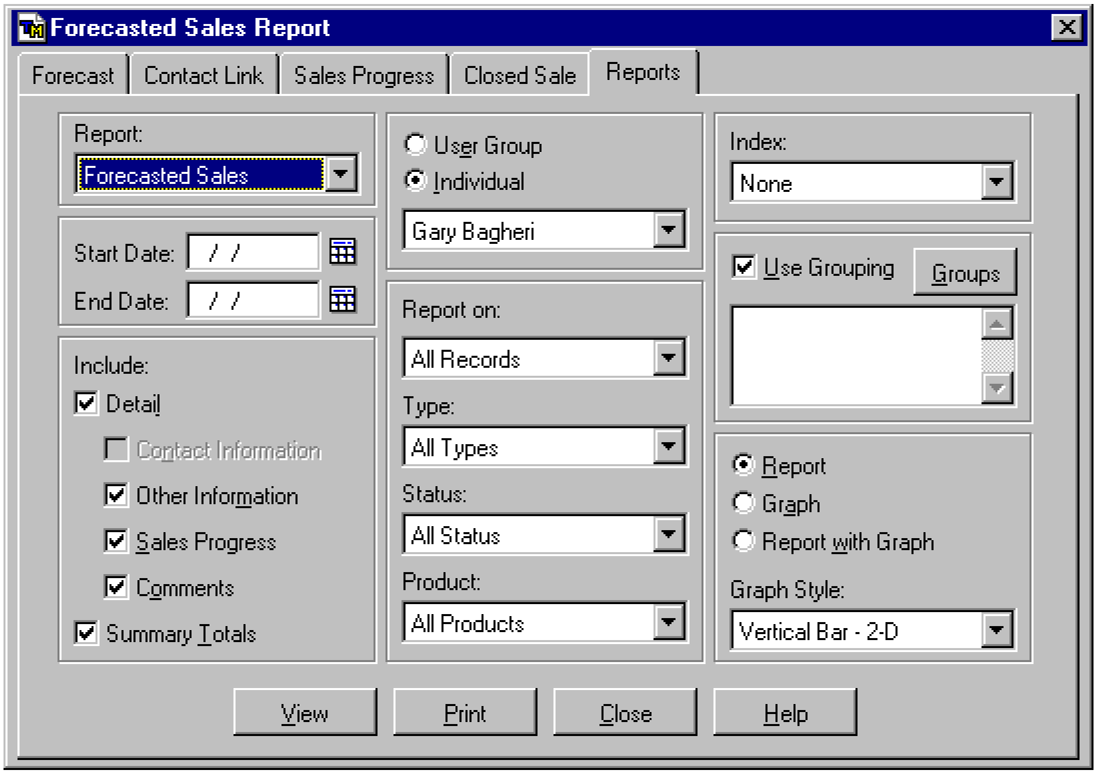
## Word Insert Merge Field Dialog Box


Microsoft Word 7 Insert Merge Field Dialog Box shown. Word 6.0 Insert Merge Field Dialog Box is similar.

## Sales Forecasting - Forecast Page



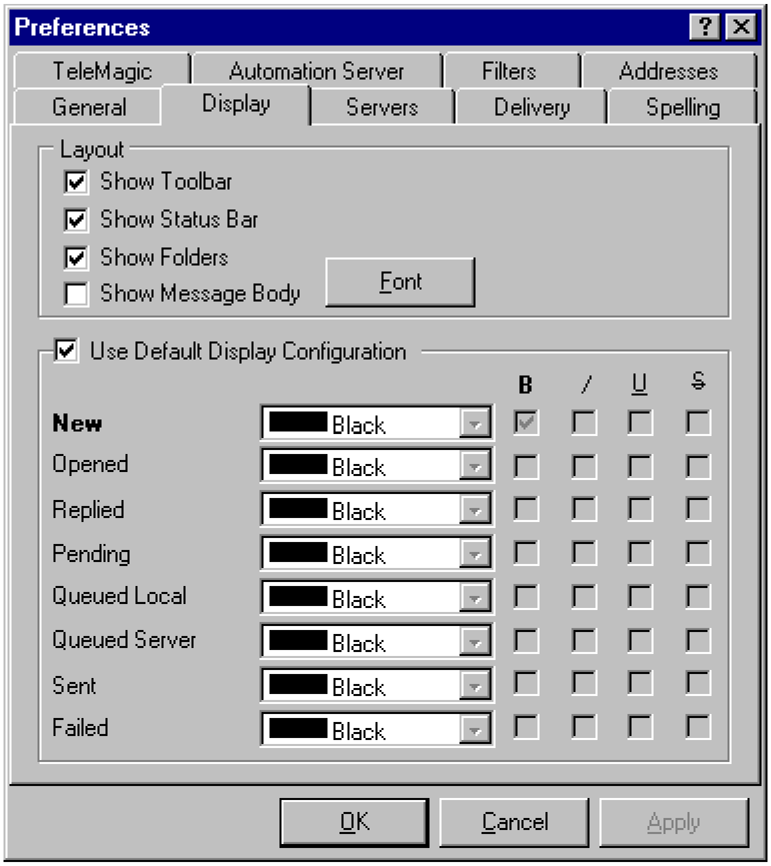
## Sales Forecasting - Reports Page



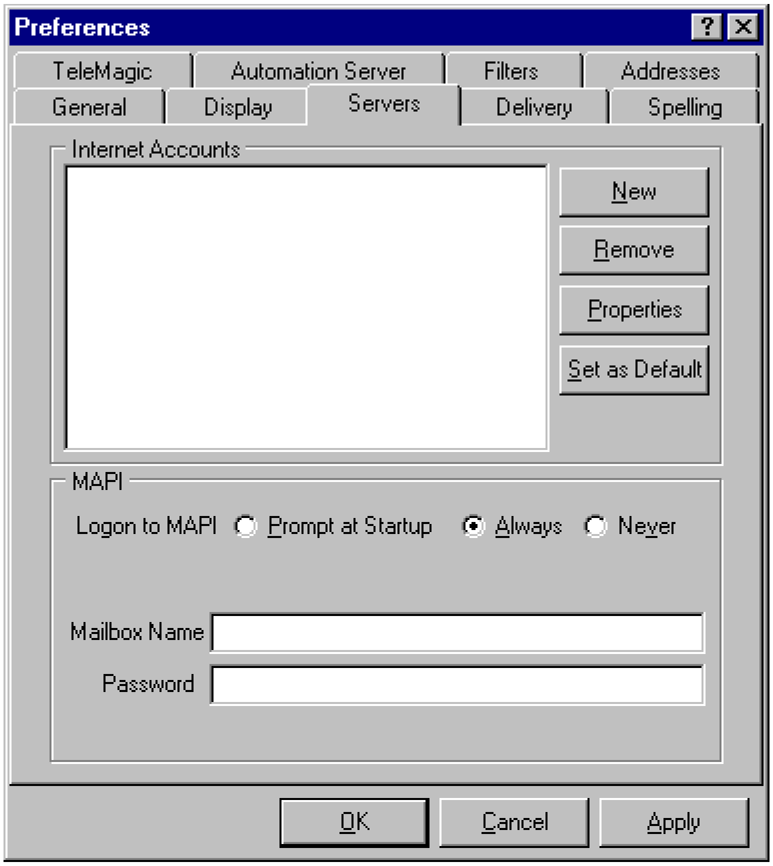
## Preferences for TeleMagic Internet Mail

•

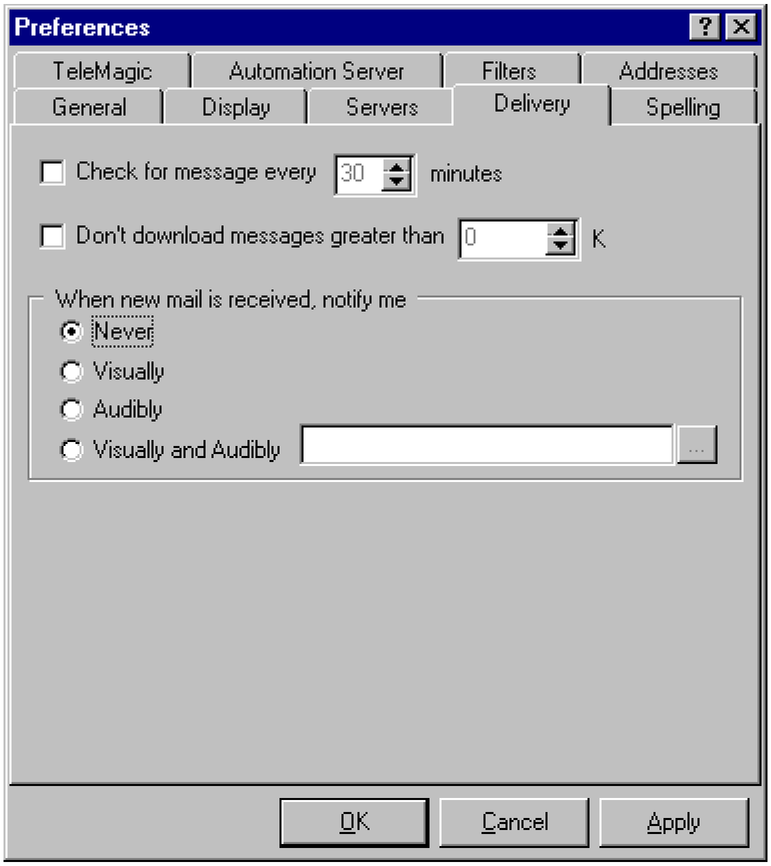
## TeleMagic Internet Mail Preferences - Display Page



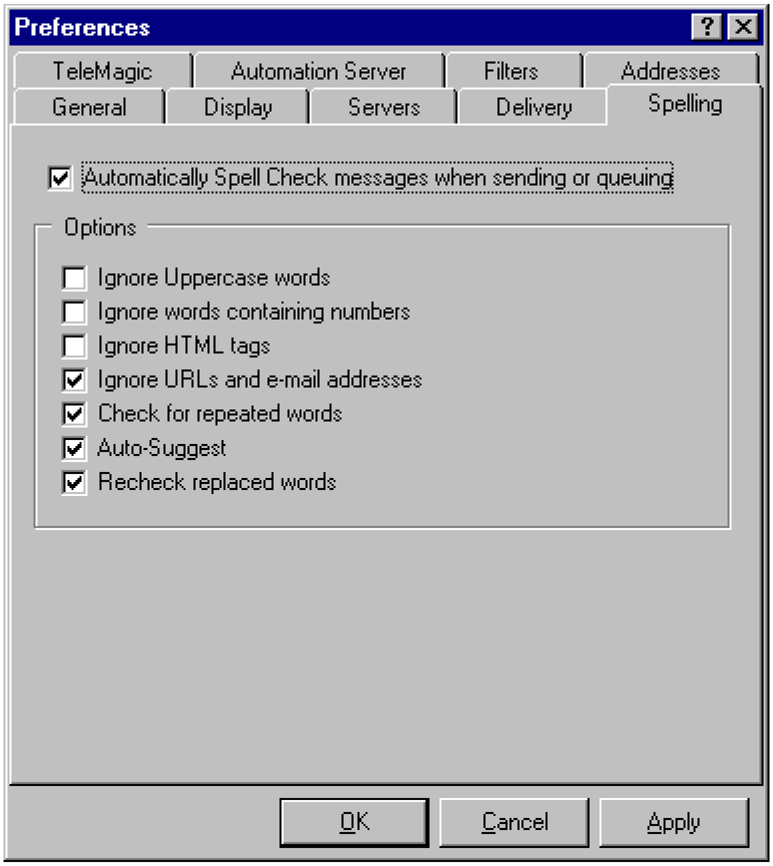
## TeleMagic Internet Mail - Servers Page



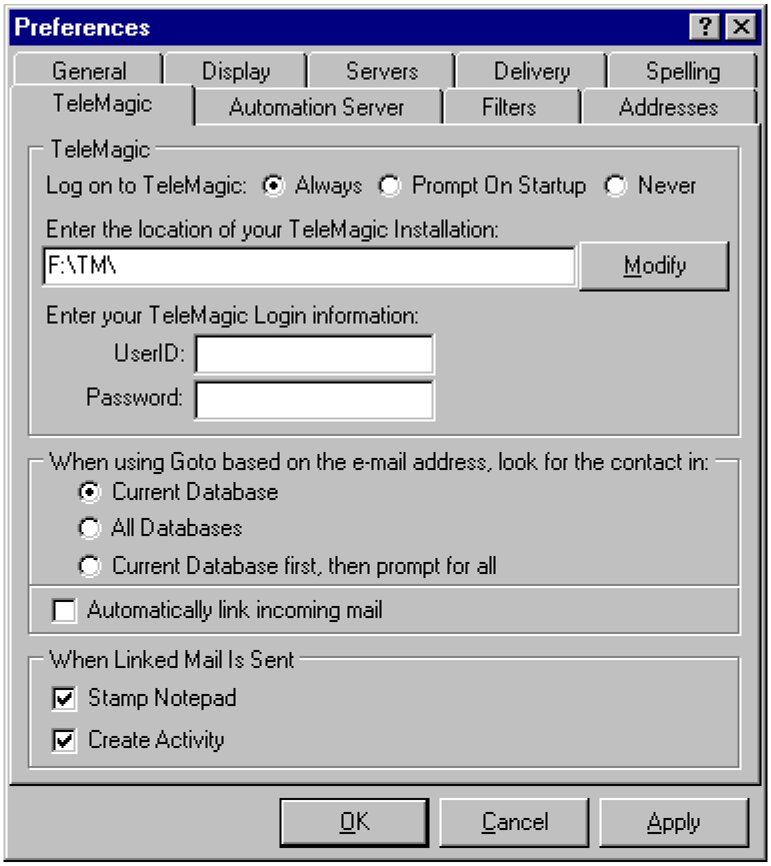
## TeleMagic Internet Mail - Delivery Page



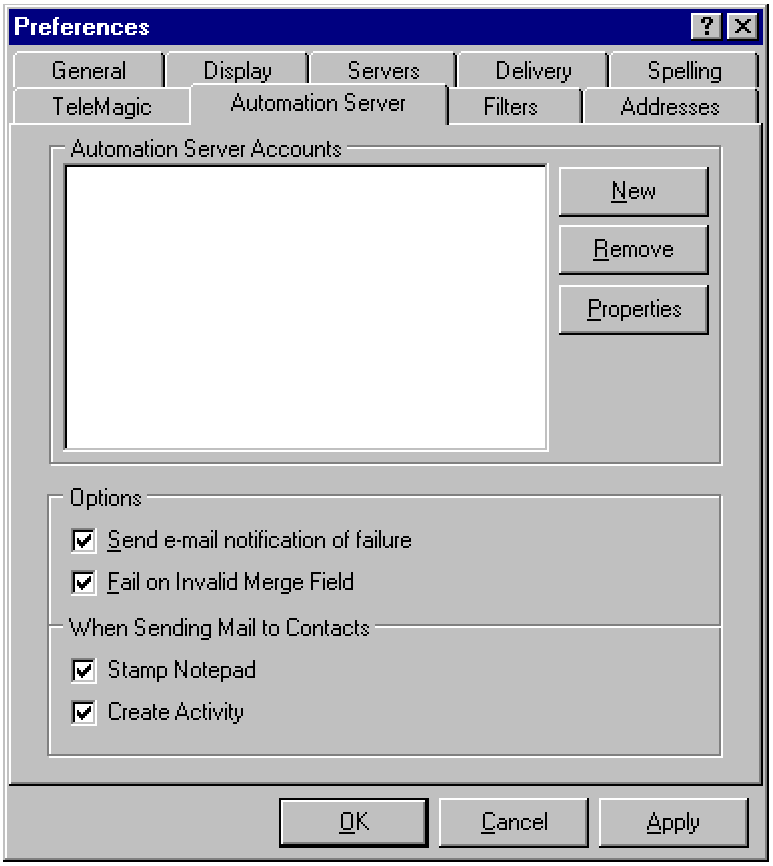
## TeleMagic Internet Mail - Spelling Page



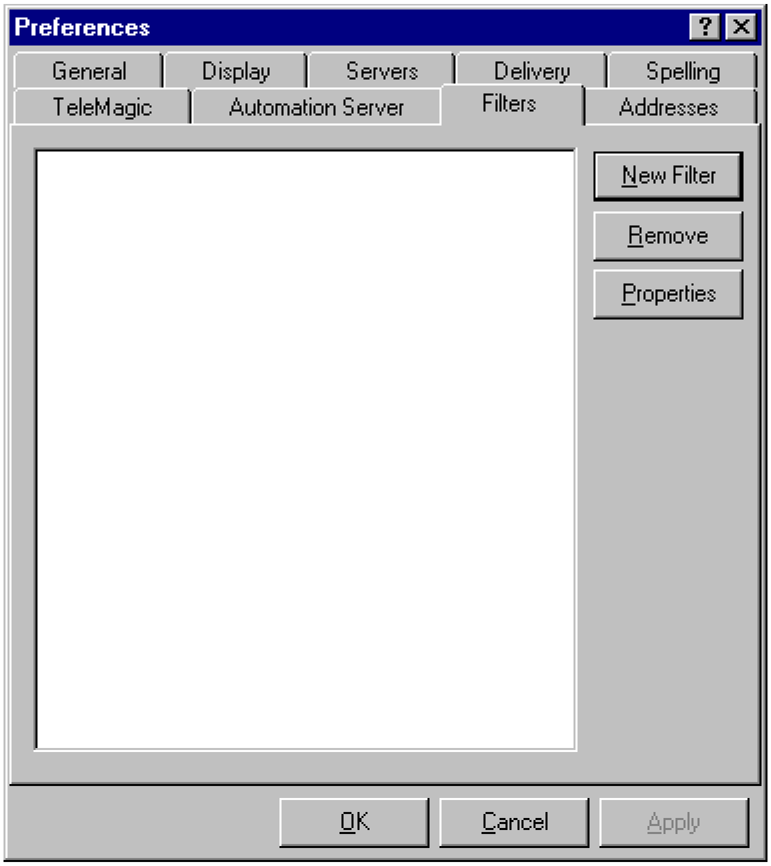
## TeleMagic Internet Mail - TeleMagic Page



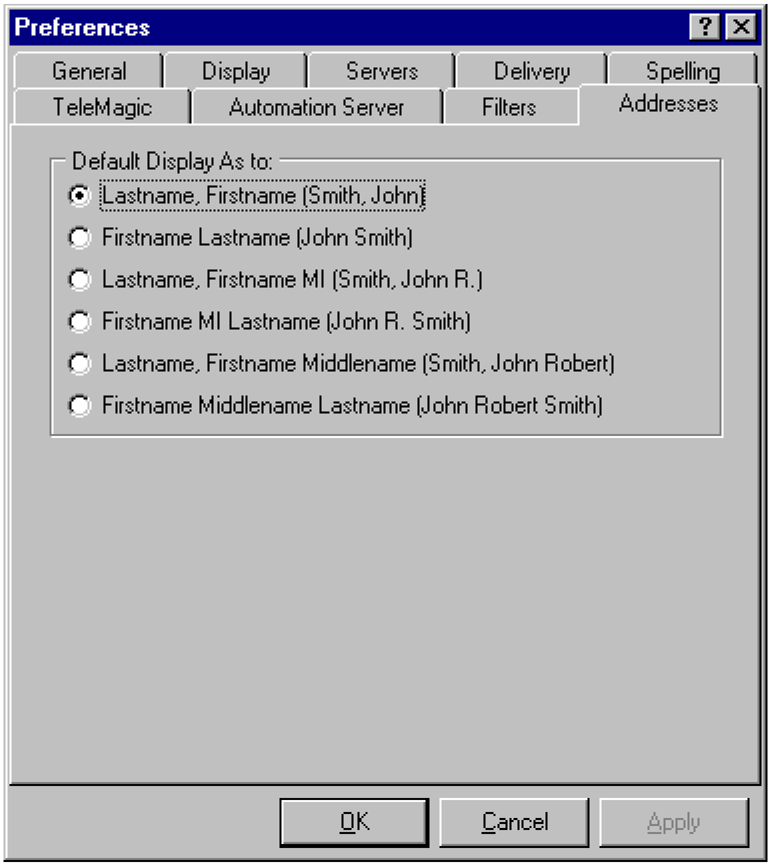
## TeleMagic Internet Mail - Automation Server Page



# TeleMagic Internet Mail - Filters Page

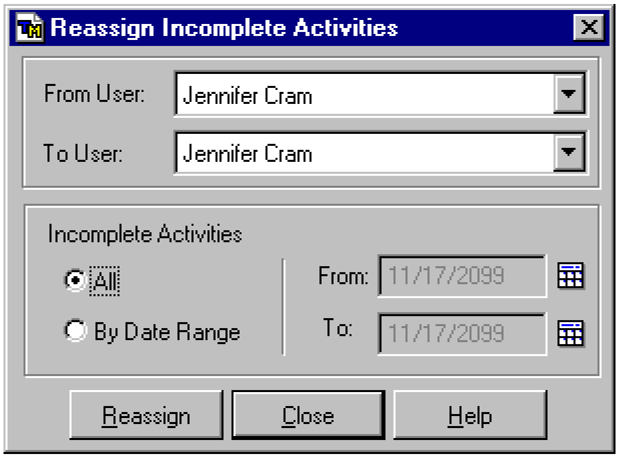


## TeleMagic Internet Mail - Addresses Page

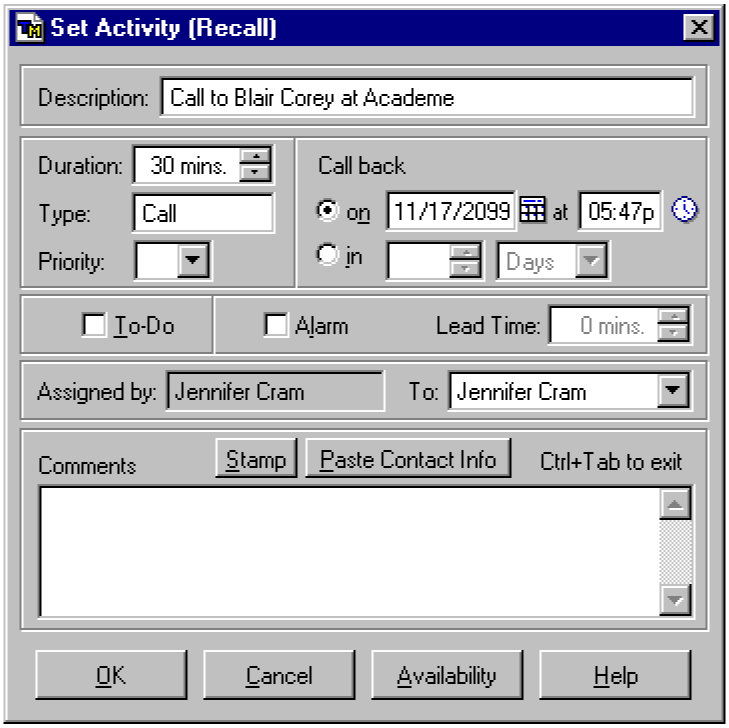


## Manual Dial Dialog Box

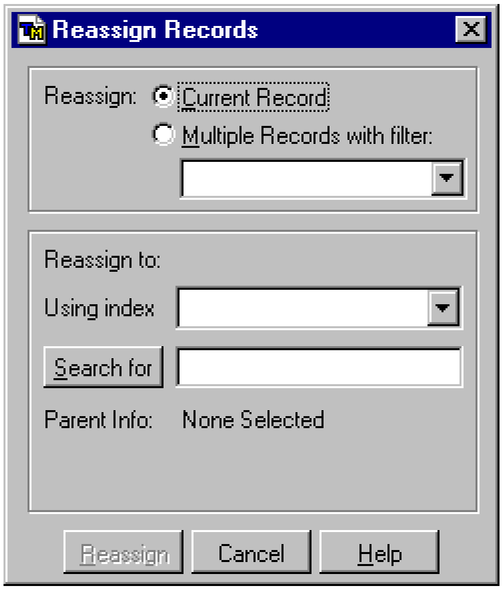
## Reassign Incomplete Activities Dialog Box



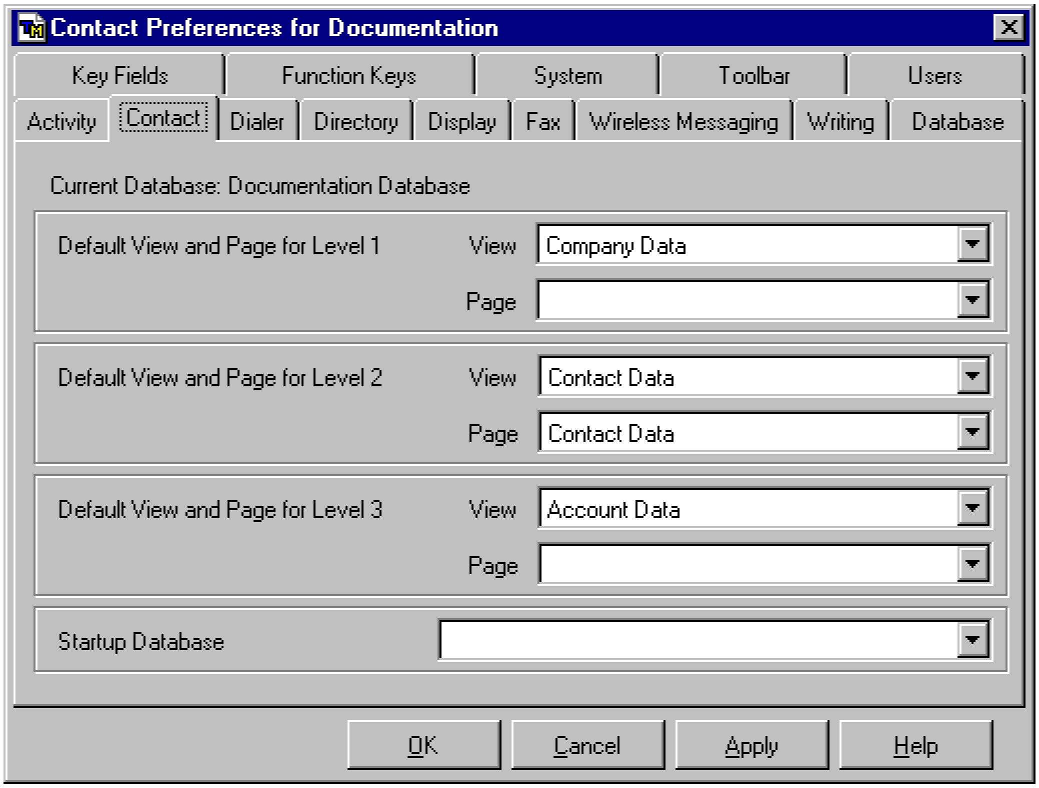
## Set Activity (Recall) Dialog Box



## Reassign Records Dialog Box



## Preferences Dialog Box - Contact Page



## Select a Level to Delete/Recover

## Activity Toolbar

-

## Calendar Toolbar

-

## Activity Manager Configuration Buttons

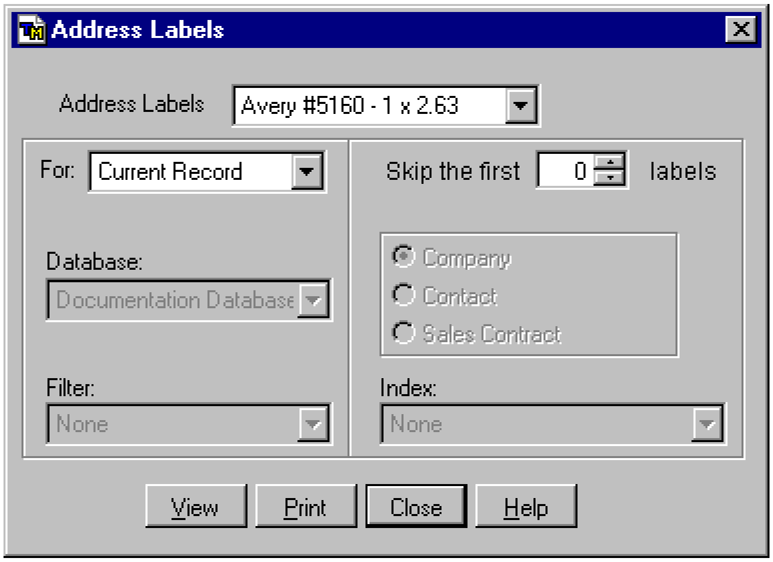
- Full screen view.
- Horizontal split.
- Four-way split.
- Left three-way split.
- Right three-way split.
- Top three-way split.
- Bottom three-way split.
- Vertical split.

## Activity Manager View Buttons

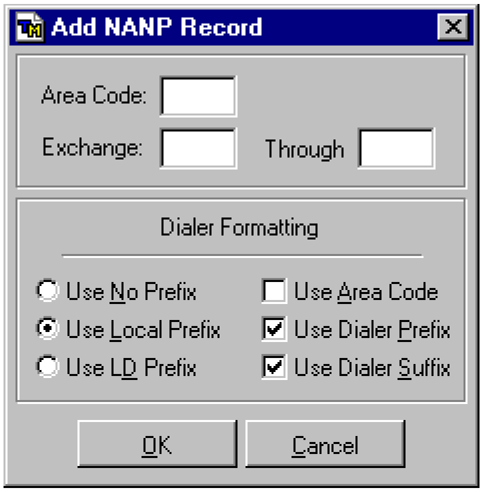
- Todo view.
- Day view.
- Week view.
- Month view.
- Detail view.

## Resource Reports Dialog Box

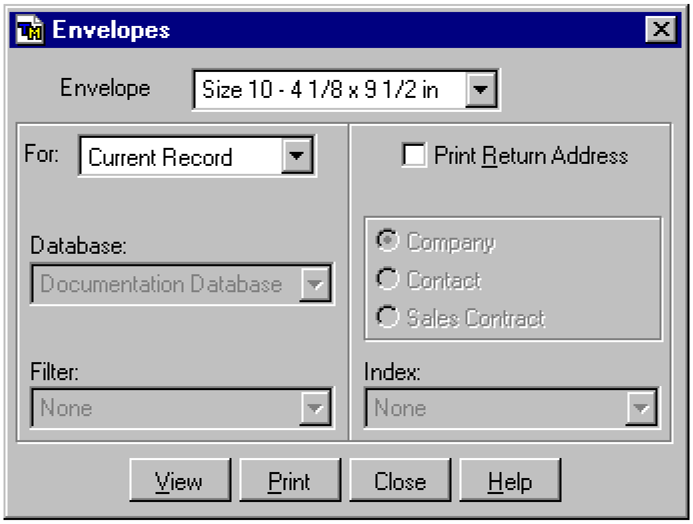
## Address Labels Dialog Box



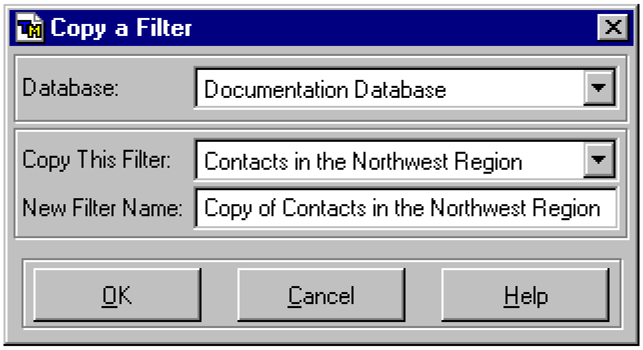
## Add NANP Dialog Box



## Envelopes Dialog Box



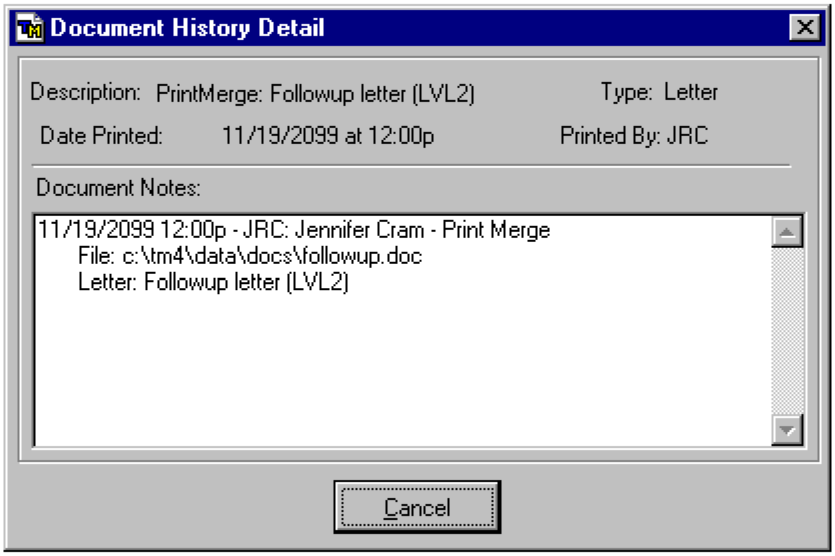
## Copy a Filter Dialog Box



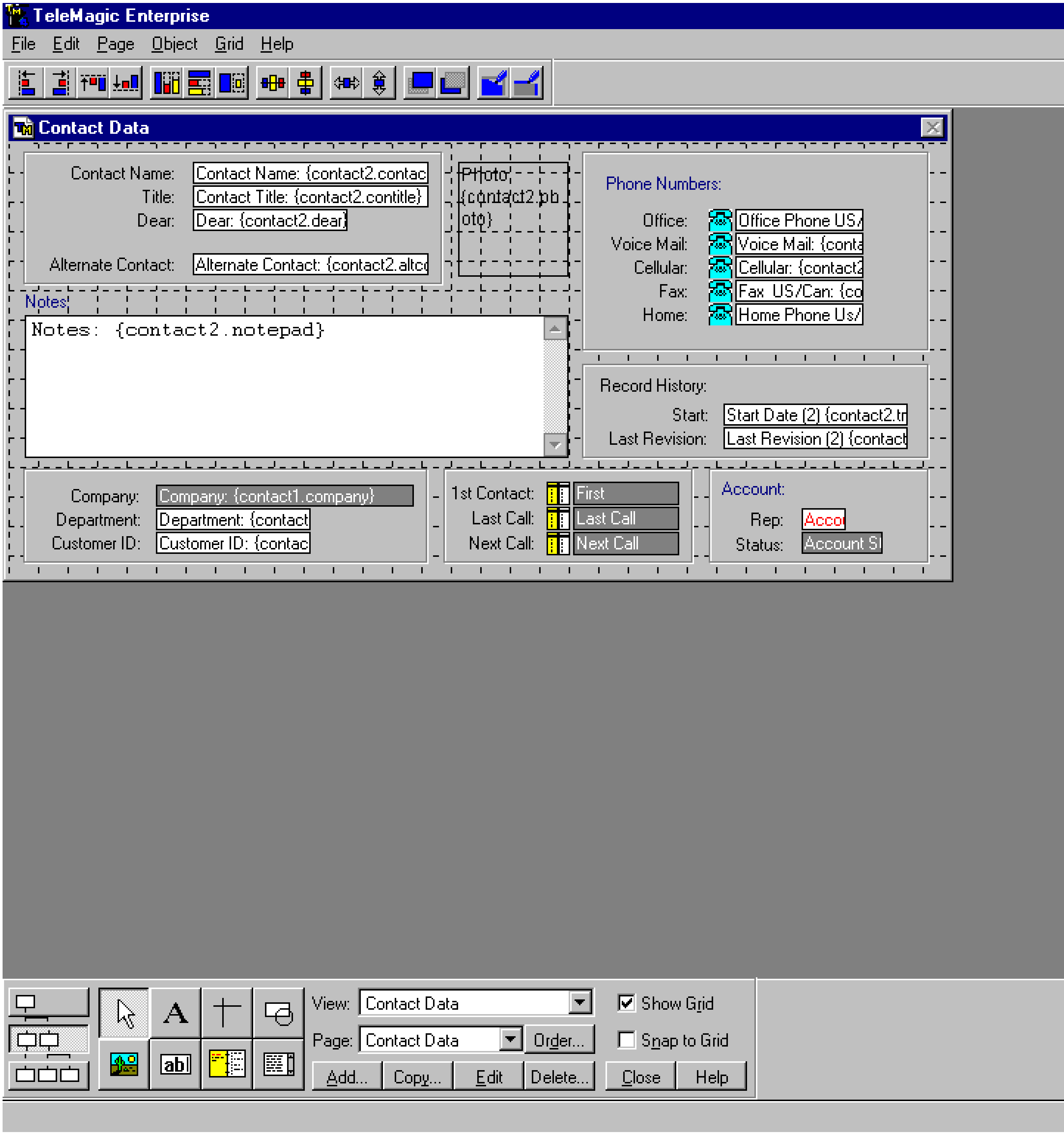
## Document History Screen

-

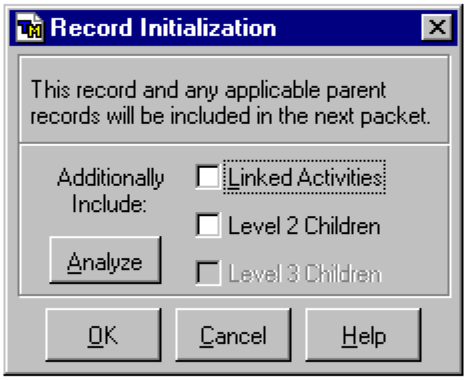
## Document History Detail Dialog Box



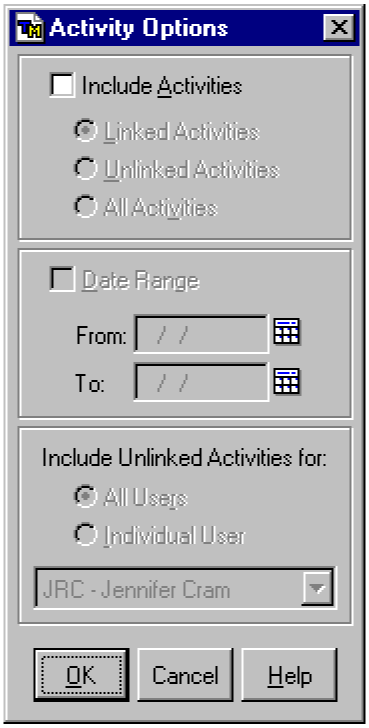
## Screen Designer Window



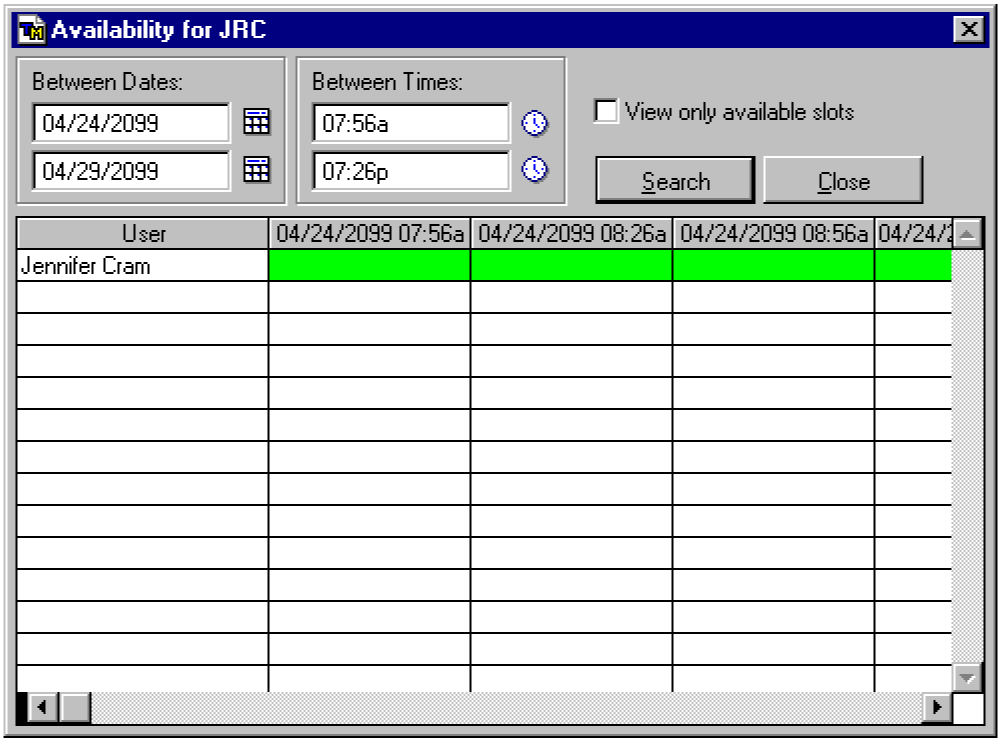
## Record Initialization Dialog Box



## Activity Options Dialog Box



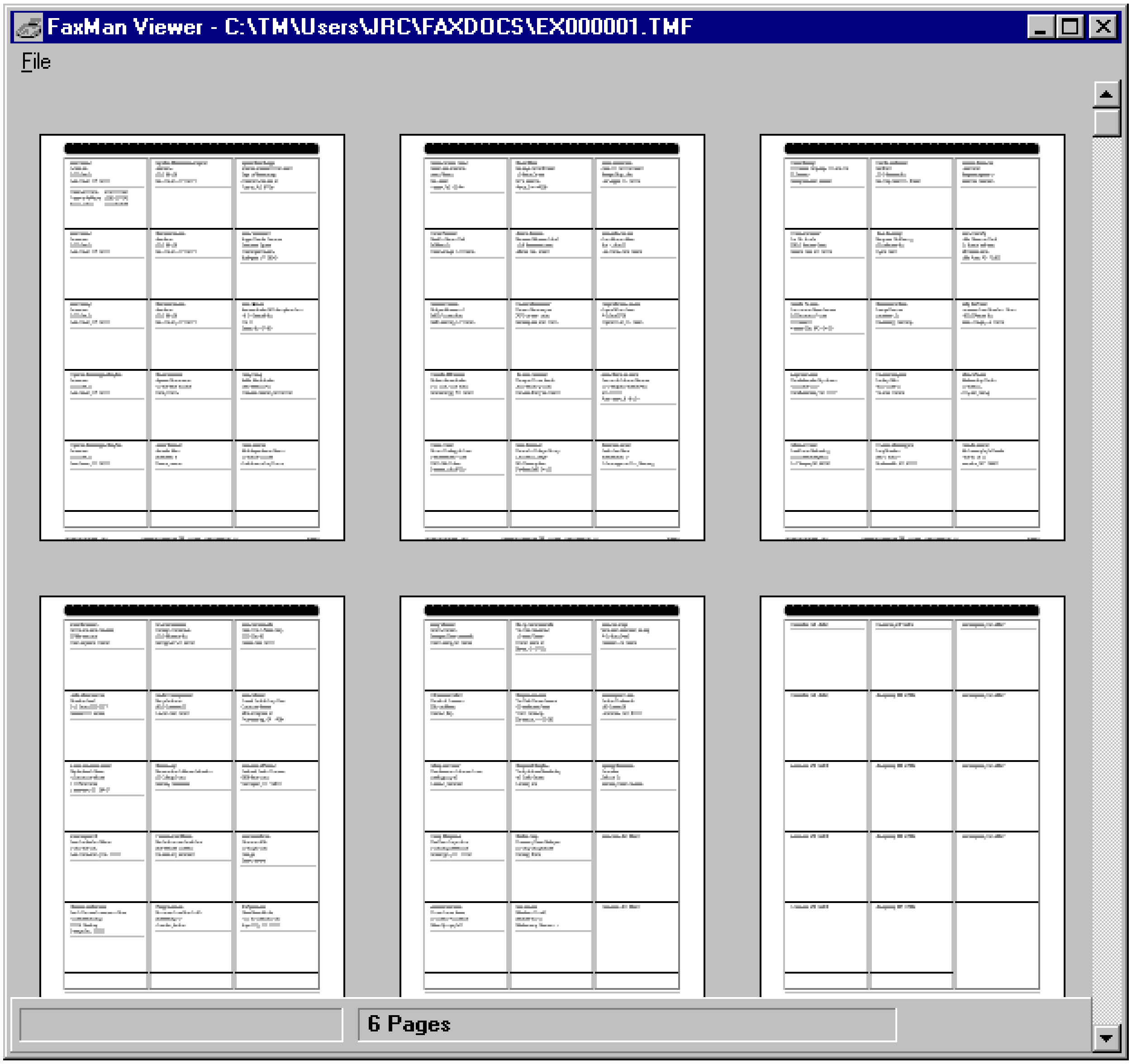
## Availability



## Automation Server Preferences

-

## Faxman Viewer



## Delivery Preferences

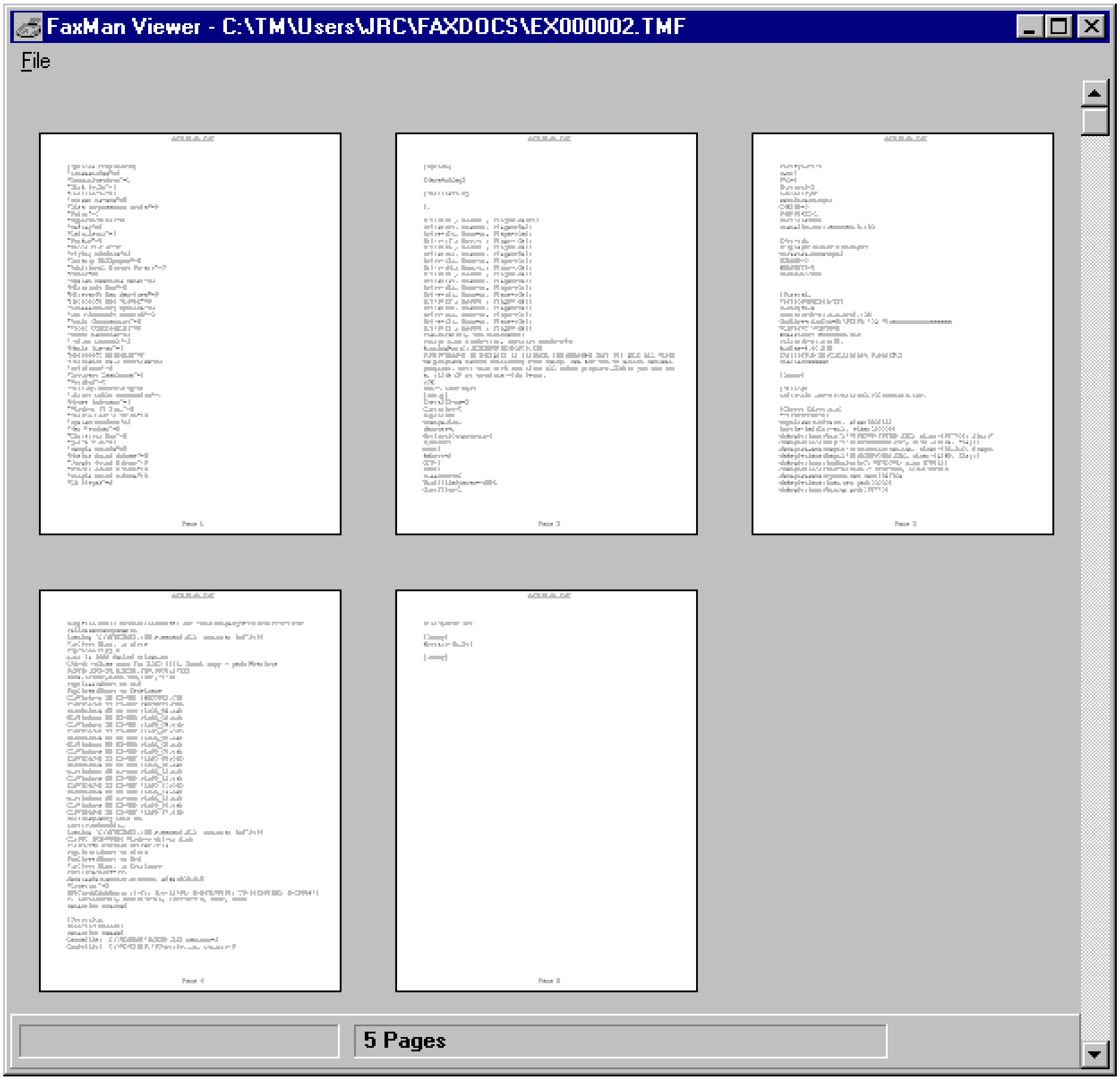
-

## Insert Merge Fields (Word 2)

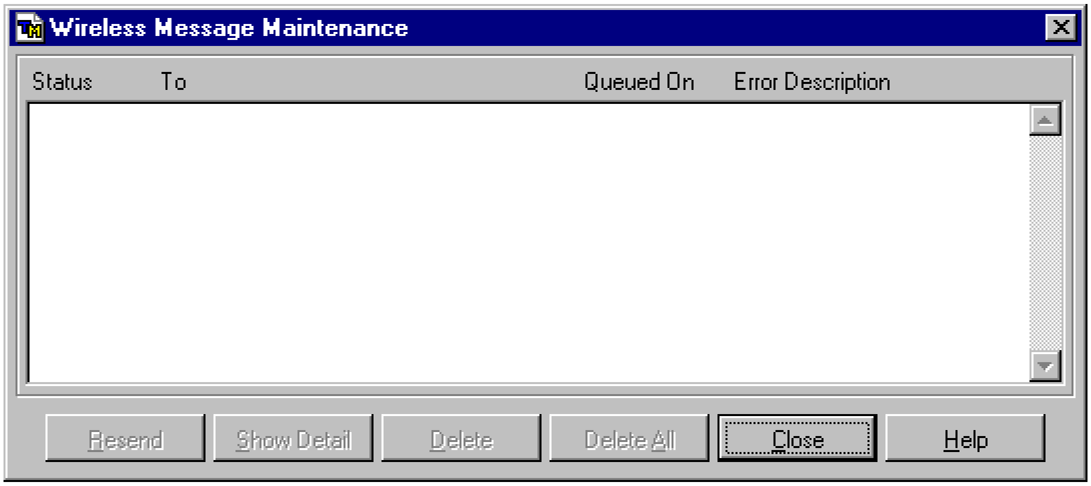
## Filters Preferences

-

## FaxMan Viewer (External Document)



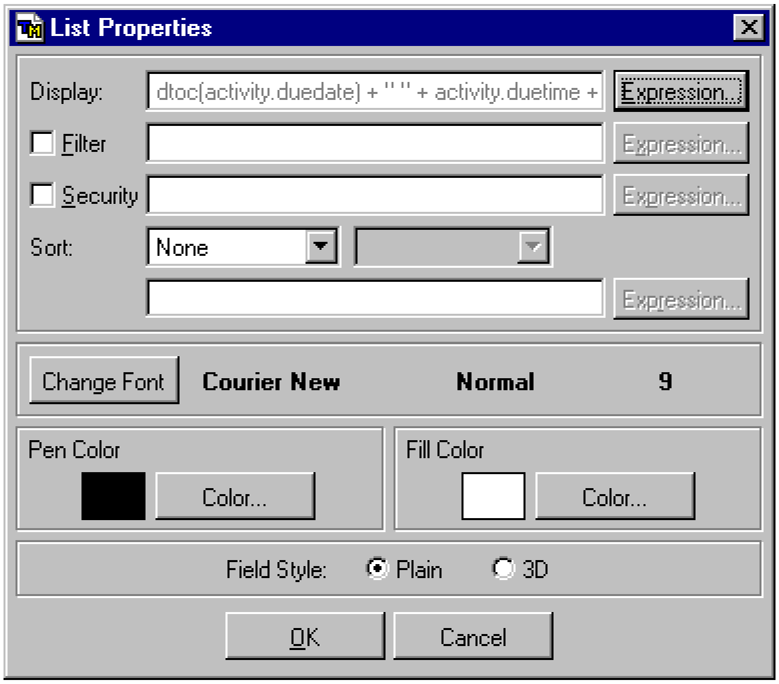
## Wireless Messaging Maintenance Dialog Box



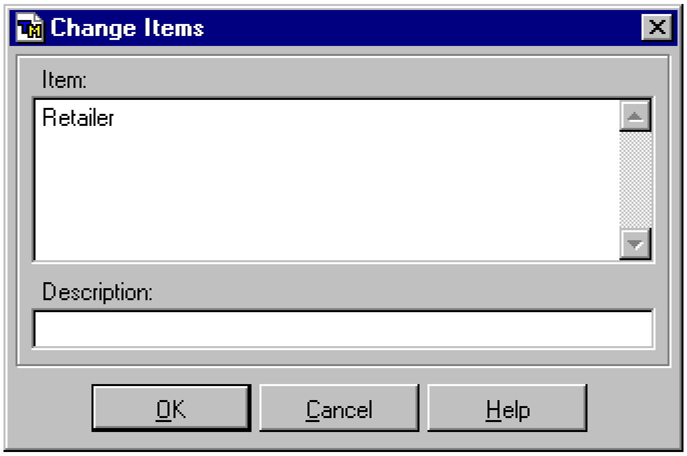
## Addresses Preferences

-

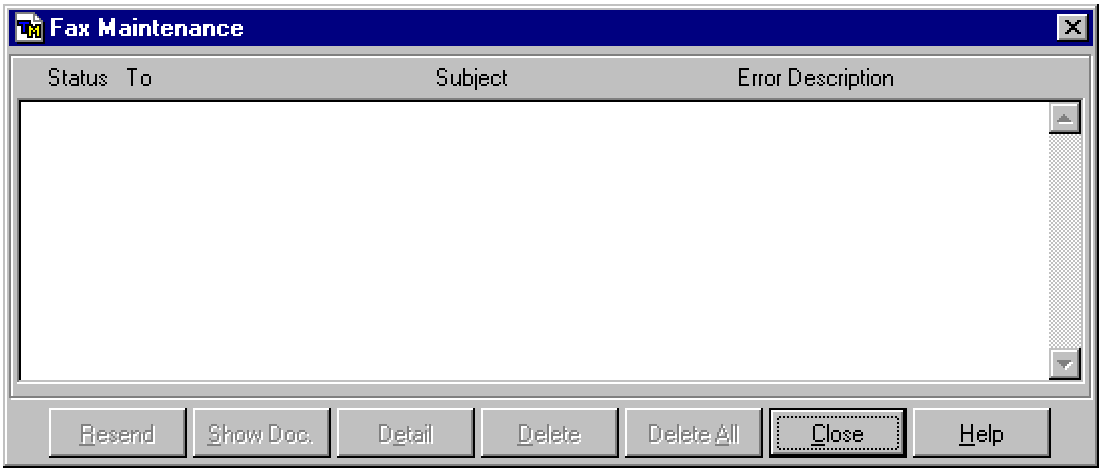
## List Properties Dialog Box



## Change Items Dialog Box



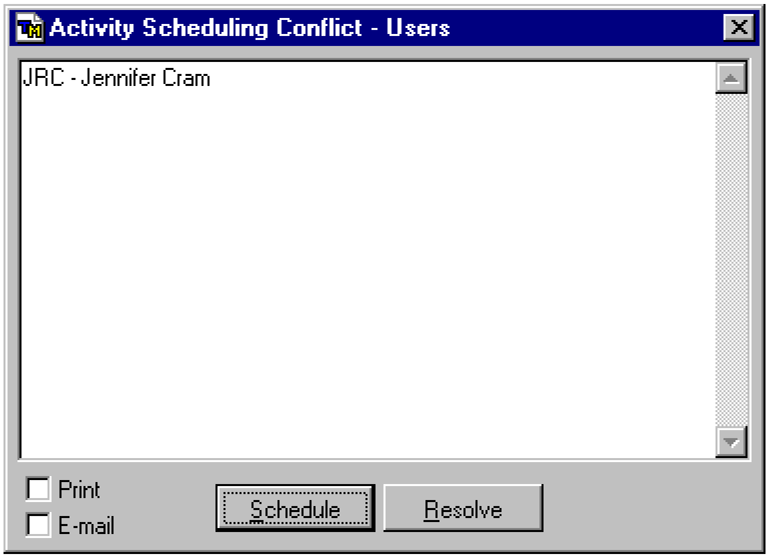
## Fax Maintenance Dialog Box



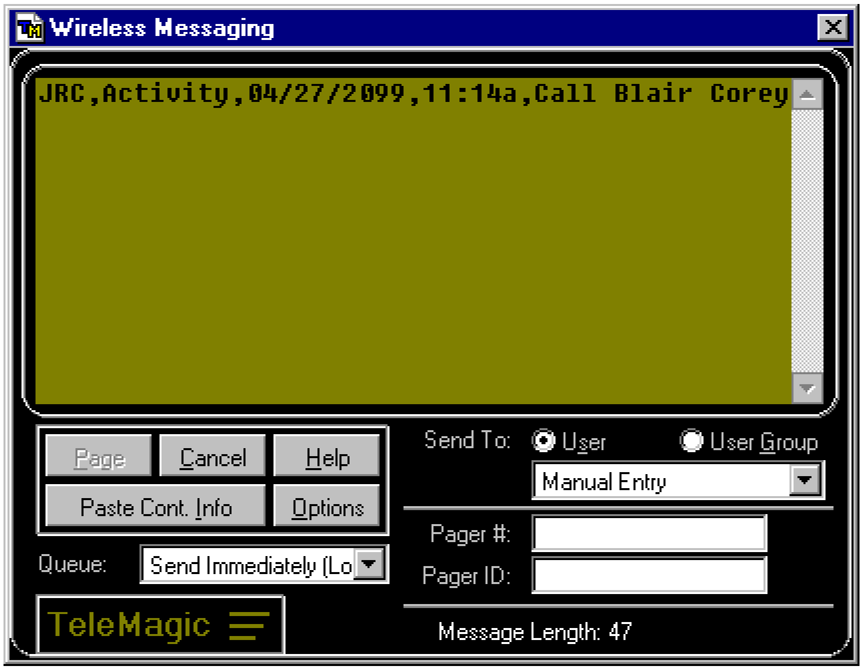
## Dialer Preferences Page

-

## Activity Conflict Dialog Box



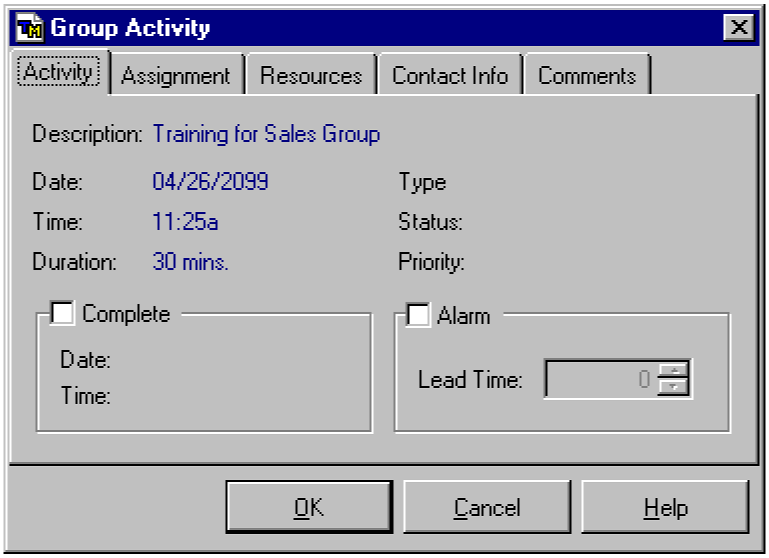
## Wireless Messaging (activity) Dialog Box



## Servers Preferences Page

- 

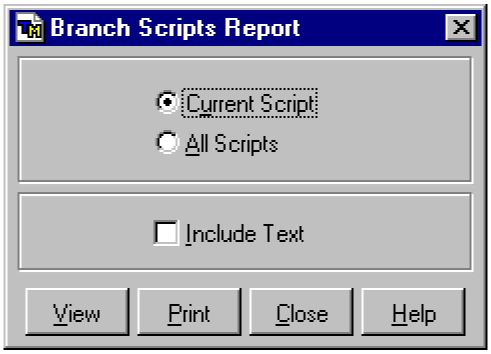
## Group Activity Dialog Box



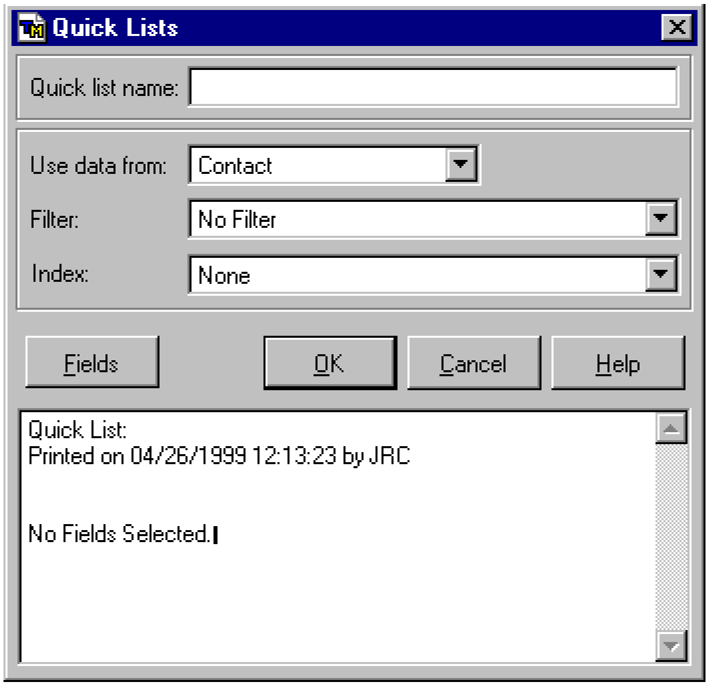
## Fax External Documents Page

-

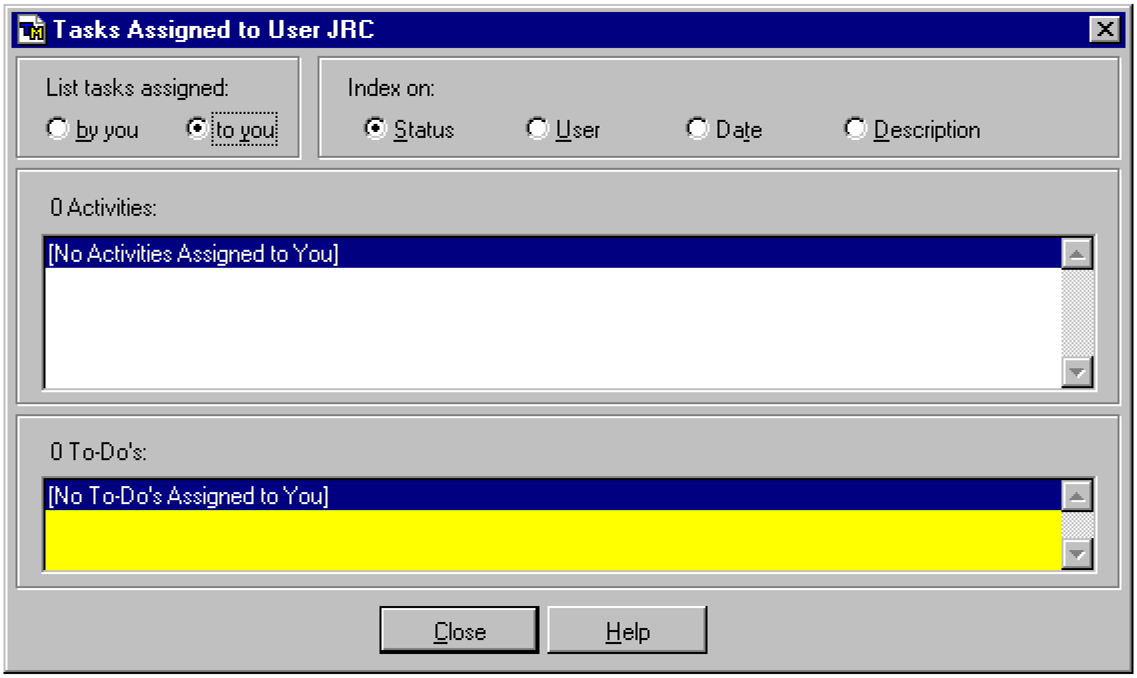
## Branch Scripts Report Dialog Box



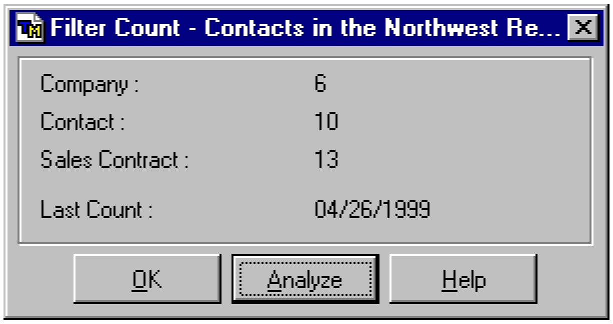
## New Quick List Dialog Box



## Tasks Assigned Dialog Box



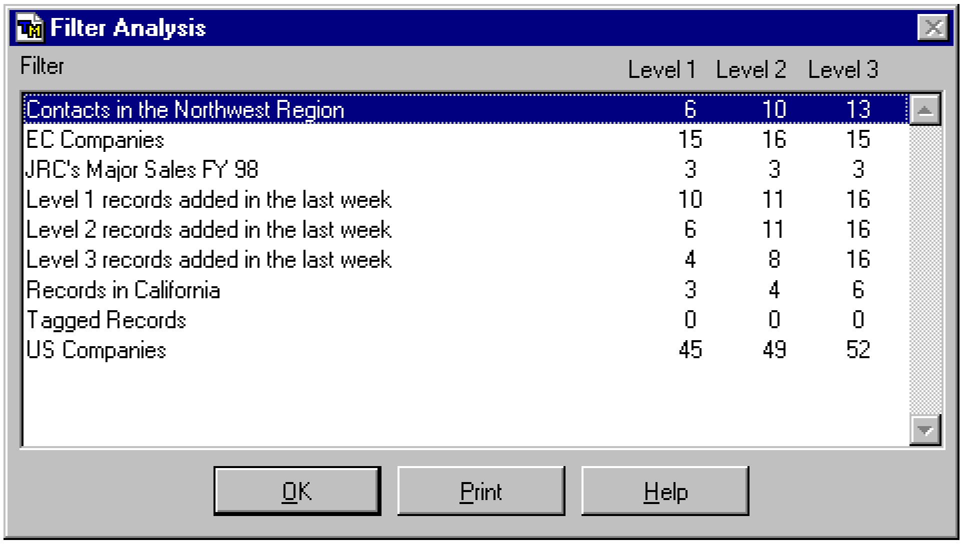
## Filter Count Dialog Box



## Analyze


Analyze
The following records will be transferred:
Level 1: 2 record
Level 2: 1 record
3 total records
OK

## Filter Analysis Dialog Box



# TeleMagic Contact Databases

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

The number and type of databases that you see when first opening TeleMagic depends on your choices when installing. You will have been given the choice of performing full installation, which includes all sample databases, custom installation, which allows you to select the databases you would like to use, or Express installation, which installs the Documentation database (used in the documentation examples), the Company/Contact database, and the TeleMagic DOS Style database (for those users who have upgraded from TeleMagic for DOS and would like to use a similar interface).

You are encouraged to open the installed databases and determine if they are useful to your installation. You can delete any databases you will not be using. If you decide you would like to use the database later, you can always reinstall from the installation CD-ROM. (For information on opening a database, see the Opening a Different Database topic. For information on exploring a database, see the Contact Manager Layout topic. For information on deleting a database, see the To Delete a Database topic.)

You have the option of using these sample databases as-is, installing additional sample databases, copying existing databases, installing blank databases that can be designed any way you like, and creating a template from your database that can be moved to other TeleMagic installations.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_Installation_and_Configuration)<<1} Copying and Adding New Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1} Customizing Existing Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} Maintaining the List of Available Databases

## Database Installation and Configuration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½MANAGEX_Hint_for_Database_Installation)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

There are several ways to approach the task of adding a new database to your TeleMagic installation:

- Copy and modify an existing, installed database. See: Copying Existing Databases

- Add a new database from the TeleMagic installation CD-ROM. See: Adding Databases from the Installation CD-ROM

- Add a database from a template created in another installation of TeleMagic. See: Adding Databases from Templates

- Add and modify a blank database, with no pre-existing fields and blank views. See: Adding a Blank Database

Remember, you cannot “break” anything, and many people learn best by experimentation. So long as you do not copy over your live data, you cannot do any permanent harm. We encourage you to experiment with database design; it will help you to become better acquainted with TeleMagic.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Making_Your_Own_Database_Some_Cautions)<<1}
Making Your Own Database: Some Cautions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Planning_Database_Location)<<1} Planning Database Location

# Adding Databases from the Installation CD-ROM

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

When you installed TeleMagic, you were given the option of installing just the default databases, all sample databases, or selecting the databases you would like to install. If you did not install all of the databases, or want to re-install a database, you are able to access the list of databases at any time after initial installation to add any of the sample databases to your TeleMagic installation.

## To Install a Database from the CD-ROM:

1. Exit TeleMagic and perform a complete backup of your system.

2. Insert the TeleMagic Installation CD-ROM in your CD-ROM drive.

   The Setup program will launch and the TeleMagic Setup screen will open.

**Or** If the Setup program does not automatically launch, select **Start**, **Run** from the taskbar.

3. Select the first button (`Install/Upgrade TeleMagic V4 for Windows or add items to an existing V4 installation`).

   The Welcoming screen will open.

4. Carefully read and follow any instructions on the opening screen. Click **Next>** when you are ready to proceed.

   The Install Type screen will open.

5. Select `Add Items To An Existing V4 Installation (No Serial Number)` and click **Next>**.

   The Choose Destination Location screen will open. You will be asked to specify where you would like to install the program.

6. Enter the path to your TeleMagic global directory (the directory containing your TeleMagic files) and click **Next>**.

   An Add New Items screen will appear informing you that you may select to add new templates, spelling dictionaries, and/or help files. This screen also provides guidelines when selecting database templates.

7. Review the information this screen then click **Next>**.

   The Custom Install screen will open.

8. From the list of `Components`, select the `TeleMagic Templates` check box.

9. Click **Change**.

   The Select Templates screen will open with a list of the available templates.

10. To select a database, scroll to the desired item and place a mark in the check box.

**or** To deselect a selected database, unmark the check box.

11. When satisfied with your selections, click **Continue**.

    You will be returned to the Custom Install screen.

12. Click **Next>**.

    The Ready? screen will appear listing your selections.

13. To accept the displayed choices, click **Next>**.

**or** Click **Back>** to return to adjust any of the settings.

   When you click **Next>**, the database installation will commence. A status bar will apprise you of the status. When it is complete, a Setup Complete screen will appear.

14. Click **Finish**.

    The Setup program will close.

15. Open TeleMagic.

    TeleMagic will detect the addition of new databases and update your installation. When it has finished, the new databases will be included in the Select Database selection box, ready for your use. See Opening a Different Database for instructions on opening your new database(s).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1} Customizing Existing Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} Maintaining the List of Available Databases

# Making Your Own Database: Some Cautions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½MANAGEX_Hint_for_Making_Your_Own_Database)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

You can use your TeleMagic database for many different types of information. Your database can be as simple as fields containing address information, or as complex as multiple calculated fields tracking invoice and stock information. When creating databases, you use the database tools provided by TeleMagic to program your own interface. It will help you to pre-design your database on paper before you start to add it, especially if you will be creating a complicated database. This can keep you from getting bogged down in programmatic details while you are brainstorming.

As you design your database, you may want to consider the impact your design will have on the overhead to the contact view. A large number of memo fields, rollup lists, and OLE fields may slow down the operation of TeleMagic. Of course, you should feel free to make your database as complex as you need it to be, but use careful planning to avoid adding unnecessary items to the screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Planning_Database_Location)<<1} Planning Database Location
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} Copying Existing Databases
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Adding_Databases_From_Templates)<<1} Adding Databases from Templates
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} Adding a Blank Database
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker

## Planning Database Location

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

By default, databases will be created in their own sub-directories off the \DATA\ directory in the main TeleMagic global directory (the directory where TeleMagic is installed) path. You can, however, store your database in any location you like, as long as it is in a new or empty directory. Before changing the location of the database from the default, if you are on a network, it is important to give some thought to network access before creating your database. Only users who have access to the selected network drive and directory will be able to use the database. Unless it is your intention to keep certain users from being able to access a database, make sure the network location you select is accessible to all. Keep in mind, also, that if you are on a network and add a database to your local C:\ drive, the database will only be accessable from your workstation.

If you do choose to add a database to your C:\ drive, you should be cautious that you do not use the same directory name as another user who has added a database to a local drive. For example, if another user has a database named Database A stored in the path C:\DATABASE\ on his or her workstation, and you add a database named Database B to the path C:\DATABASE\ on your workstation, there is the potential for confusion. TeleMagic recognizes databases by their location. When you select either of these locally stored databases from the Select Database selection box, TeleMagic will search your C:\ drive for the directory \DATABASE\ and use whatever database it finds there. If you try and open Database A, instead of being warned that you have no access to the database, you will be taken to the database in the specified path on your own workstation, namely Database B.

To avoid running into such problems, we advise network administrators to be aware of all database paths and ensure that they are unique.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Making_Your_Own_Database_Some_Cautions)<<1} Making Your Own Database: Some Cautions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} Copying Existing Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Adding_Databases_From_Templates)<<1} Adding Databases from Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} Adding a Blank Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker

# Copying Existing Databases

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

Adding, copying, and deleting databases is subject to TeleMagic security access. See your network administrator for information on your security rights.

The easiest way of creating a new database is to copy an existing database. When you copy a database, all of the existing fields and screens will be copied. You will also have the option of copying existing records and database security access (i.e., any users who can access the original database, will also be able to access the copied database).

## To Copy an Existing Database:

1. From the **File** menu, choose **Select Database**.

   The Select Database selection box will appear with a list of databases available in the program.

2. Highlight the database you would like to copy and click **Copy**.

   The Copy a Database dialog box will open.

3. In the `New Name:` field, give the database a unique description. This description will appear in the Select Database selection box.

   The database path in the **Directory** field will default to the \DATA directory off the main TeleMagic global directory (the directory where TeleMagic is installed) path.

4. At the end of the default directory path, enter a directory location for the database. You must either enter an existing empty directory, or enter a new directory name and TeleMagic will create it. (If you are working on a network, you must have network access rights to add a directory.)  If you do not want to add the directory to the default path, enter the complete path in the **Directory** field.

**or** Choose the **Directory** button to select the path from a Windows Select Directory dialog box. (You must select an empty directory.)

- 5. If you would like to copy the contact records for the existing database to the new database, mark `Copy Contact Data`.

- **or** If you would like to copy an empty database with no contact record, unmark `Copy Contact Data`.

6. If you would like to copy any security access established for this database, mark `Copy Security Settings`. Anyone who is able to access the original database will

be able to access the new database. It will also copy users' rights within that database, such as the ability to view fields and add records.

**or** If you do not want to copy security, unmark `Copy Security Setting`. Only Supervisor users will be able to access the database until you grant rights to the other security groups.

7. Click **OK**.

   A window will apprise you of the status as the database is copied. When it is complete, the new database will appear in the Select Database list.

8. To open the new database, highlight it on the list and click **Open**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1} Customizing a Database: Database Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Adding_Databases_From_Templates)<<1} Adding Databases from Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} Adding a Blank Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} Database List Maintenance

# Adding a Blank Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

Adding, copying, and deleting databases is subject to TeleMagic security access. See your network administrator for information on your security rights.

## To Add a Blank Database:

1. From the **File** menu, choose **Select Database**.

   The Select Database selection box will appear with a list of databases available in the program.

2. Select **Add** to bring up the Add a Database screen.

3. Choose `Blank database` and click **Install**.

   A second Add a Database dialog box will appear, asking for a new name and directory.

4. Choose a descriptive name for the database in the `New Name:` field. This description will appear in the Select Database selection box.

   The database path in the **Directory** field will default to the \DATA directory off the TeleMagic global directory (where TeleMagic is installed) path.

5. At the end of the default path, enter the directory location for the database. You must either enter an existing empty directory, or enter a new directory name and TeleMagic will create it. (If you are working on a network, you must have network access rights to add a directory.) If you do not want to add the directory to the default path, enter the complete path in the **Directory** field.

**or** Choose the **Directory** button to select the path from a Windows Select Directory dialog box. (You must select an empty directory.)

6. Click **OK**.

   TeleMagic will create the new directory. When finished, you will be given a rebuild warning instructing you to rebuild the database before opening it.

7. Click **OK**.

8. At the Select Database selection box, click **No Database**.

9. Rebuild the database. (Click here for instructions on rebuilding a single database.)

10. Once the database has been rebuilt, select **File**, **Select Database** to open the Select Database dialog box.

11. Highlight your new database on the list and click on **Open**.

    You will return to the TeleMagic main screen, though no database information will appear. You will not be able to open the Contact Manager until you have created views for the database.

    For details on creating fields, see: Adding Fields to a Contact Database

- For details on adding the fields you have created to a view using the Screen Designer, see: Screen Designer

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1} Customizing a Database: Database Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} Copying Existing Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Adding_Databases_From_Templates)<<1} Adding Databases from Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} Database List Maintenance

# Customizing a Database: Database Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

TeleMagic allows a broad range of customization options for your databases, including anything from naming your database levels to changing the fields that are displayed.

Changes to the available fields and the appearance of objects on the screen are covered in the topics Adding Fields to a Contact Database and Screen Designer.

Changing the way your database behaves is covered in Database and Key Field preferences. Database preferences allow you to establish:

- Names for each level of the database, and which one will be the controlling level;
- Default currency symbol and where it is displayed in the field (e.g., $100.00 instead of 100.00$);
- Whether or not to lock (prevent others from changing) a record while it is being dialed;
- The standard address format.

Key field preferences allow you to establish the fields that contain “key” information that TeleMagic uses throughout the program. Key Fields must be defined in order to use various features of TeleMagic.

In addition to the Database and Key Field preferences, you can make the following preferences database specific by storing them in the database directory in Directory preferences:

- TeleMagic function keys
- Toolbar configuration
- List boxes

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Database_Preferences)<<1} Database Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Preferences)<<1} Directory Preferences

## Database List Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

The Select Database selection box will contain the descriptions of the databases that exist in the current installation of TeleMagic. You have the option of deleting databases from this list, which will also delete the associated database description, or changing the description of a database on the list.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_To_Change_the_Name_of_a_Database)<<1} To Change the Name of a Database:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_To_Delete_a_Database)<<1} To Delete a Database:

# To Delete a Database:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

Deleting databases is subject to TeleMagic security access rights. Contact your system administrator if you have any questions on your security access.

1. From the **File** menu, choose **Select Database**.

   The Select Database selection box will open.

2. Highlight the database you would like to delete and click **Delete**.

   A message will appear asking you to confirm your decision to delete.

3. Click **Yes** to continue.

**or** Click **No** to abort.

A warning will appear informing you that deleting a database is permanent. If you proceed you will not be able to recover the database. You will be asked if you would like to abort the process.

4. Click **No** to delete the database.

**or** Click **Yes** to abort.

If you select **No**, the database will be deleted.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1}Database List Maintenance

# Changing the Name of a Database:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

**WARNING!**
If you are using Data Synchronization Server with this installation of TeleMagic, be extremely cautious when changing the name of a database. If you will be synchronizing the database with a database of the same name in another installation of TeleMagic, changing the name will cause Data Synchronization to not recognize the corresponding database. (If the database is currently selected in Data Synchronization for synchronization, you will not be able to change the name.)   If a database was previously used with Data Synchronization Server, and has been taken off the list of databases to be synchronized, do not change the name unless you are absolutely positive that it will not be used again in synchronization. Using a database that was once synchronized and has since had its name changed, will cause errors.

## To Change the Name of a Database

1. From the **File** menu, choose **Select Database**.

   The Select Database selection box will open.

2. Highlight the database name that you want to change.

3. Choose **Change**.

   The Change the Database Name dialog box will open, showing the current name and location of the selected database.

4. In the `To:` field, type the new database name.

5. When finished, choose **OK** to save the name and exit the dialog box.

**or** To exit without saving changes, choose **Cancel**.

   The Select Database selection box will open, displaying any changes you have made.

6. To exit the Select Database selection box, select a database and choose **Open**.

**or** Choose **No Database**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1}Database List Maintenance

# To Rebuild a New Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Databaseï¿½ ï¿½ ï¿½ )<<1}

1. From the **File** menu, select **Rebuild**.

   The Rebuild dialog box will appear.

2. Unmark the `System`, `Global`, `User Tables`, and `Floating` check boxes if they are marked.

3. Mark the `Database` check box and choose the **Database** button to select your new database for the rebuild.

   A Database Files dialog box will appear.

4. Select your new database from the `Databases` list.

5. Click **Add**.

6. Choose **OK**.

   The TeleMagic Rebuild dialog box will reappear.

7. Choose **OK**.

   The database will be rebuilt, and a status bar will keep you up to date on progress.

# To Install a Database Based on an Existing Template:

TeleMagic allows you to create templates from your databases that can be installed on other installations of TeleMagic. Installing templates is a two step process: first you must install the template in TeleMagic, then you must install a database based on that template. These instructions will walk you through adding a database once you have installed your template. (For instructions on installing templates, see the To Add a Template to TeleMagic topic.)

1. From the **File** menu, choose **Select Database**.

   The Select Database selection box will appear.

2. Select **Add**.

   The Add a Database screen will open, showing all currently-installed templates.

3. Choose a database template from the list and click **Install**.

   A second Add a Database dialog box will open.

4. In the `New Name:` field, enter a description for the database that will appear in the Select Database selection box.

   The **Directory** field will already be partially filled in with the \DATA sub-directory off the current global drive and directory.

5. At the end of the default path, enter a directory location for the database. You must either enter an existing empty directory, or enter a new directory name and TeleMagic will create it. (If you are working on a network, you must have network access rights to add a directory.) If you do not want to add the directory to the TeleMagic global directory path (where TeleMagic is installed), enter the complete path in the **Directory** field.

**or** Choose the **Directory** button to select the path from a Windows Select Directory dialog box. (You must select an empty directory.)

6. Click **OK**.

   TeleMagic will create the new database.

   When finished, you will be given a rebuild warning.

7. Click **OK** to close the rebuild message.

   You will be returned to the Select Database selection box.

8. Click **No Database**, then perform a rebuild. (See To Rebuild a New Database for instructions on rebuilding a single database.)

9. From the **File** menu, choose **Select Database**.

10. At the Select Database dialog box, highlight your new database on the list and click **Open**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Customizing_a_Database_Database_Preferences)<<1} Customizing a Database: Database Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Copying_Existing_Databases)<<1} Copying Existing Databases

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Adding_a_Blank_Database)<<1} Adding a Blank Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(dbutil.hlpï¿½DBUTIL_Using_the_TeleMagic_Template_Maker)<<1} Using the TeleMagic Template Maker

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE_Database_List_Maintenance)<<1} Database List Maintenance

# Adding Fields to a Contact Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

Adding a field to a database is a three-step process. First, you must create, define, and customize the field; then you must rebuild the database; finally you must use the Screen Designer to place the fields on the contact screen.

Remember as you are creating fields that each level of your database can store up to 252 fields (excluding the TMSTART, TMLASTREV, and CONTACTID fields), no matter how few (or how many) are actually displayed on-screen.   Keep in mind, if you are using the Accounting Link, the accounting fields that are added to your database during the linking process will count toward your 252 fields.   In cases where you have reached your 252 field limit, you will need to print out a Database Structure report (see *System Reports* in the *Troubleshooting* chapter of the *System Administrator & Installation Guide*), decide which fields you can afford to delete, delete those fields (see the To Delete a Field topic), and run a rebuild (see the Database Rebuild topic).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Special_Fields)<<1} Special Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

# Pre-defined Database Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

Every database comes with two fields already added to each level: a Start field and a Last Revision field.

- The Start: field is used to register when a record was first added to the database, and by whom; See: Start Field

- The Last Revision: field tracks when and how a record was last changed, and by whom. See: Last Revision

These fields can be displayed on any page of any view, or you can choose not to display them at all. (If you decide not to have them appear on any page, they will still appear in browse and can still be used in reports.) Neither field can be edited or deleted.

In addition to these two fields, there is a Contact ID field automatically included on each level. This field contains the unique number that TeleMagic uses to identify each record. This field cannot be directly displayed on the screen or in browse.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Special_Fields)<<1} Special Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

## Pre-Defined Database Fields: Last Revision

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

The Last Revision field shows the date and the time when a record was last changed, and the User ID of the person who changed it. There is a separate Last Revision field for each level of a database.

The prompt for the Last Revision field on Level 1 of any database is `Last Revision 1`; on Level 2 it is `Last Revision 2`; and on Level 3, `Last Revision 3`. (These prompts cannot be altered, but when designing screens you can choose to display the field without a prompt, and add an appropriate text object in its place.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Start_Field)<<1} Start Field

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Special_Fields)<<1} Special Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types

## Pre-Defined Database Fields: Start Field

The Start field contains the date and the time a record was added, followed by the user ID of the person who added it. There is a separate Start field for each level of a database.

The prompt for the Start field on Level 1 of any database is `Start 1`; on Level 2 it is `Start 2`; and on Level 3, `Start 3`. (These prompts cannot be altered, but when designing screens you can choose to display the field without a prompt, and add an appropriate text object in its place.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Last_Revision)<<1} Last Revision
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Special_Fields)<<1} Special Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types

# Special Database Fields

There are a number of fields that can be added to your database to perform special functions. These fields are recognized by their field names or prompts.

Pre-defined Fields
Recall Field (RCL)
Last Call Field (LCL)

## Continue…

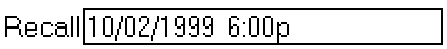
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Field_Types)<<1} Field Types
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

# Special Database Fields: Recall Field (RCL)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

Recalls are scheduled calls to contacts, generally for the purpose of following up on previous communication. You have the choice of setting activity based recalls or contact based recalls. Activity based recalls are set in the Activity Manager by creating a Call type activity. Contact based recalls are created using a special field named RCL.

The Recall field is designed to contain the date and time of the next scheduled recall. It is unique in that it allows for a date and time in the same field:




Contact based recalls are useful if the contact needs to receive a call, but it does not matter who places the call. Rather than creating an activity based recall that must be assigned to someone, you can create a Recall field to record the information that a call is necessary on the given date and time.

To create a Recall field, add a field using the instructions under Creating and Defining Fields. When instructed to provide a field name, name the field **RCL**. When instructed to select a field type, select Character. (The Recall field must be at least 14 characters in length.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Special_Fields)<<1} Special Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT2_Using_an_RCL_Field_for_Recalls)<<1} Using an RCL Field for Recalls

## Special Database Fields: Last Call Field (LCL)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

TeleMagic provides you with the ability to track the last time an activity of any given type was completed for a contact. (See the Activity Fields Tool topic for information on using the Activity Fields Tool in the Screen Designer to add these fields to your contact view). This is useful in tracking the last time a call was placed to a contact, assuming that the user placing the call has his or her Dialer preferences set up to create activities based on calls. If some users are not tracking their phone calls through the Activity Manager, a field designed to contain the last completed Call type activity may not actually reflect the true last call.

The Last Call field has been designed to contain information pertaining to the last call placed (or received) using the TeleMagic Dialer. When a call is terminated, the Last Call field will be updated with the date, time, User ID, and a plus sign (+) for incoming calls or minus sign (-) for outgoing calls.

To create a Last Call field, add a field using the instructions under Creating and Defining Fields. When instructed to provide a field name, name the field **LCL**. When instructed to select a field type, select Character. (The Last Call field must be 14 characters in length, or longer.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Special_Fields)<<1} Special Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

# Creating and Defining Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

To create a field entails giving it a name and a prompt. To define a field entails specifying the field type and length.

You create TeleMagic data fields either from the **File** menu or through the Screen Designer. (The Screen Designer is a powerful feature which makes it possible for you to simultaneously lay out your contact views and to add fields to your database. See the Screen Designer topic for more information.)

## To Create and Define a New Data Field from the File Menu:

1. From the **File** menu, select **Add / Edit Fields**.

   The Edit the Field List dialog box will appear.

2. From the `Level` radio buttons, choose a database level.

   The field list will display all existing fields for that database level. The editing screen on the right of this dialog box will display the field information for the currently highlighted field.

3. Choose **Add**.

   The **OK** button will toggle to **Save Field** and the right side of the dialog box will become active.

4. In the `Prompt`: field, type a field prompt, exactly as you want it to appear on the field list.

   The field prompt is a plain English description of the field contents. It should be clear, simple, and easy to understand. TeleMagic can display the field prompt as a field label on contact screens and in browse.

5. In the `Field name:` field, type a field name. The name can contain no more than ten alphanumeric characters. It cannot contain special characters or spaces and the first character must be non-numeric.

6. Select a field type from the `Type:` drop-down list. The following field types are available:

   - `Character` fields can contain any type of data you like. This will probably be your most common field type.
   - `Date` fields can only contain actual dates.
   - `Number` fields can only contain real numbers. You will not be able to type letters into a number field.
   - `Memo` fields allow you to enter any amount of information in a scrolling window. You can enter letters,

numbers, special characters, and spaces into a memo field.

- `Check Box` fields display on the screen as a box that may be marked or left unmarked (similar to the check boxes available on TeleMagic dialog boxes). In reporting, these are logical fields that return a "Yes" if the box is marked, or "No" if it is not marked.
- `Phone` fields are designed to contain phone numbers. Phone fields will be referenced when using the Dialer feature. The contents will appear in the Dialer dialog box and the field will be preceded in the Contact Manager by a phone icon: ● .
- `Fax` fields are designed to contain fax numbers and are used with the Fax feature. They will be preceded in the Contact Manager by a fax icon: ● .
- `Unique Number` fields are designed to contain an automatically generated unique number. For example, you may have a page designed to create an invoice. A unique number field may be used to generate the invoice numbers.
- `OLE - General` fields hold pictures, sounds, charts, graphs, animations, and other objects created in other programs.

Once you have selected a field type, TeleMagic will display a default field length for that type.

7. If you do not want to use the default length, type the desired length in the `Length:` field, or use the spinner arrows to enter a field length. Fields may be up to 250 characters long.

8. If this is a numeric field, specify if you would like the number to contain decimal places. Use the spinner arrows to indicate how many characters you would like devoted to decimals. (If you select to include decimal places, keep in mind that a decimal point must be added to the field. The decimal point counts toward your field length. Adjust the length to accommodate this, if necessary.)

9. If you would like this field to be available when merging in the word processor, mark the `Include in Merge` check box.

**or** If you do not want this field to be available when merging documents, unmark this check box. The contents of the field will not be available in word processing documents.

10. If you would like this field included in the Contact Browse window, mark `Include in Browse`.

**or** If you do not want this field to appear in the browse list, unmark this check box. (The more fields you include in browse, the longer it will take to load. Additionally, there is a limit to how many fields can be displayed in browse. If you are not able to display all fields, exclude any unnecessary fields from browse.)

11. If you would like the first letter of every word in the field capitalized, mark the `Auto Capitalization` check box. (If marked, TeleMagic will apply the rules of capitalization and only capitalize nouns, pronouns, adjectives, verbs, adverbs, and subordinating conjunctions. Articles, coordinating conjunctions, and prepositions will not be capitalized.)

**or** If you do not want to capitalize the contents of the field, unmark this check box.

12. Click here if this is a number field and you would like to customize it to display currency.

13. Click here if you would like to select any of the advanced configuration options.

14. Choose **Save Field**.

    The new field prompt and name will appear highlighted on the field list. The field name will appear in brackets to the right of the prompt. The field will be available in the Screen Designer to be added to a contact view. It will not be available for use in the Expression Builder, calculations, or other areas of TeleMagic until a rebuild has been run.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Customizing_Fields)<<1} Customizing Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Database_Rebuild)<<1} Database Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Deleting_Fields)<<1} Deleting Fields

# Customizing Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

Customizing data fields includes setting up templates, establishing validation rules, and writing formulas for calculated fields.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration

# Creating and Defining Fields: Number Formats

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

When defining the fields in your database, you may want to set defaults in number fields for automatic display of a currency sign. You may also want to limit entries in number fields to whole numbers or a fixed number of decimal places.

You will not necessarily want to define each field which will contain numbers as a numeric field. As a general rule-of-thumb, if you will not be performing mathematical calculations on a field it does not need to be a numeric field. For example, ZIP codes and postal codes are better left as more customizable character fields.

You can also use field templating to “hard-code” symbols or characters into your numeric fields. For example, you may want a percent sign to display as part of the field. See Templated Fields for more information.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_as_Currency)<<1} To Format a Number Field to Display as Currency:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_Only_Whole_Numbers)<<1} To Format a Number Field to Display Only Whole Numbers:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_Decimal_Places)<<1} To Format a Number Field to Display Decimal Places:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

## To Format a Number Field to Display as Currency:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. From the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.

2. Choose a database level from the level radio buttons.

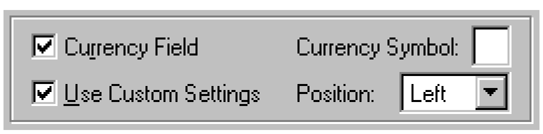
3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

The editing screen will become active.

4. Be sure that `Number` is selected as the field `Type:` and that the total field `Length:` includes enough spaces for all numeric digits, a decimal point (if necessary), and the currency symbol.

5. To display a currency symbol, mark the `Currency Field` check box. This activates the default currency symbol. (The default currency symbol is set in Database preferences. See Currency Symbol for information on setting the default currency symbol.)




**Currency Display Selector**

If you mark `Currency Field`, the `Use custom settings:` check box will become available. This check box allows you to override the default currency symbol and use a custom symbol.

6. If you would like to specify a currency symbol other than the default for this field, mark the `Use custom settings:` check box.

If you mark `Use custom setting:`, the `Currency Symbol:` field will become available.

7. Type the currency symbol for this field into the `Currency Symbol:` field.

**Warning!**

Do not use “9” as your currency symbol. If you enter “9” in this field, it will be read as a template and will not be displayed in the field. It will allow an additional number to be entered in the field. If the field length is not long enough to accommodate the extra digit, the contents of the field will be rounded when it is next opened.

8. If you have selected a custom currency symbol, from the `Position`: field, select whether you want this symbol to be displayed to the left or right of the number.

9. Choose **Save Field** to end the changes to the field.

10. Choose **OK** to save all changes made during the current editing session and exit the Edit the Field List dialog box.

**or** Click **Cancel** to abort all changes made to any fields during the current editing session.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_Only_Whole_Numbers)<<1} To Format a Number Field to Display Only Whole Numbers:

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Database_Rebuild)<<1} Database Rebuild

# To Format a Number Field to Display Only Whole Numbers:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.
2. Choose a database level from the level radio buttons.
3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

The editing screen will become active.

4. Be sure that `Number` is selected as the field `Type:` and that the total field `Length:` includes enough spaces for all numeric digits and (if necessary) a currency sign.
5. Select or type 0 in the `Dec. Places:` field.
6. Choose **Save Field** to end the changes to the field.
7. Choose **OK** to save all changes made during the current editing session and exit the Edit the Field List dialog box.

**or** Click **Cancel** to abort all changes made to any fields during the current editing session.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_as_Currency)<<1} To Format a Number Field to Display as Currency:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_Decimal_Places)<<1} To Format a Number Field to Display Decimal Places:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Database_Rebuild)<<1} Database Rebuild

# To Format a Number Field to Display Decimal Places:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.
2. Choose a database level from the level radio buttons.
3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

The editing screen will become active.

4. Be sure that `Number` is selected as the field `Type:` and that the total field `Length:` includes enough spaces for all numeric digits including the decimal places, a decimal point, and (if necessary) a currency sign.

   **Example:** An eight-character, two-decimal place number field formatted for currency display could display any number from $0.00 to $9999.99.

5. In the `Dec. Places:` field, type or select the total number of digits you want to display after the decimal point.
6. Choose **Save Field** to end the changes to the field.
7. Choose **OK** to save all changes made during the current editing session and exit the Edit the Field List dialog box.

**or** Click **Cancel** to abort all changes made to any fields during the current editing session.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_as_Currency)<<1} To Format a Number Field to Display as Currency:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_Only_Whole_Numbers)<<1} To Format a Number Field to Display Only Whole Numbers:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Database_Rebuild)<<1} Database Rebuild

# Templated Fields

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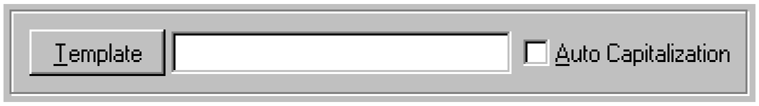


**Template Field**

Creating a custom template for a field means specifying in what format data may appear in the field. There are two types of templating characters: literals and formatting characters. Literals are used to hard-code a character into a field. For example, you may want to place a hyphen into a phone field so users do not have to type the hyphen in every phone number. Formatting characters act as place-holders for data you can type into a field. They allow you to specify what type of character can be placed into the field at a particular spot. For example, you may have a field designed to contain customer account codes which always start with a letter followed by 4 digits. You would use formatting characters to specify that the first character must be a letter and the next four must be numbers. Users would not be able to enter any other type of characters in those spaces.

You can create custom templates for Character, Number, Unique Number, or Phone fields. Templates are created clicking the **Template** button in the Edit the Field List dialog box. A dialog box will appear with templating options specific to the current field Type.

The Character, Phone, and Number Template dialog boxes contain a list of the formatting characters (placeholders) available with each field type. Any characters entered into the template that are not contained on the list will be treated as literals and will appear in the field exactly as typed into the `Template`: field.

The Unique Number Template dialog box allows you to define the parts of your unique number.

If you do not create a custom template, TeleMagic will apply the default template for the field type (with the exception of Unique Number fields, which must have a custom template).

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Character_Fields)<<1}
Creating Templates for Character Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Number_Fields)<<1}
Creating Templates for Number Fields

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______154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1
} Creating Templates for Phone Number Fields

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______154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Unique_Number_Fields)<<
1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Number_Formats)<<1} Simple Formatting for Number Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# Creating Templates for Number Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

If you would just like to include a decimal or currency symbol in the field, it is not necessary to create a template. See Number Formats for more information.

The Number Template dialog box contains an `Input Mask:` field where you can enter your template characters (formatting characters and literals), descriptions of five formatting characters (input mask symbols), and five formatting check boxes.

The formatting characters are used as follows:

“.” (Period) Indicates the position of the decimal point;

“,” (comma) Shows where larger numbers should be separated by a comma;

**9** Stands as a placeholder for numbers and/or signs (+ and -);

**#** Stands as a placeholder for numbers, signs (+ and -), and spaces;

You cannot use non-numeric place holders in number field templates. Any characters that work as a place holder in other field types will be interpreted as literals in number fields if they do not appear on this list.

The formatting check boxes work as follows:

`Left Justify` will override the default right justification of the field;

`Blank if Zero` will leave the field blank if no number has been entered into it, or if the number entered is zero;

`Use Leading Zeros` will cause any unfilled digits in the field to appear as zeros preceding the number. For example, if the field has a length of five characters, and the number currently in it is 26, it will display as follows:

**00026**

`Select the field on entry` will cause the entire field to be selected when you click in it, allowing you to overwrite the contents of the field with a single keystroke;

`Scientific Notation` can be used to handle extremely large numbers. For example, it will change 10 million to .10000E+8.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Number_Formats)<<1} Simple Formatting for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Format_a_Number_Field_to_Display_a_Percent_Sign)<<1} Sample Number Template (Percent Sign)

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1} Creating Templates for Unique Number Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced
Configuration (Validated, Calculated, Default Fields)

# To Format a Number Field to Display a Percent (%) Sign:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.
2. Choose a database level from the level radio buttons.
3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

The editing screen will become active.

4. Be sure that `Number` is selected as the field Type.
5. Set the field length to 4. This will make the field long enough for any entry from 0% to 100%.
6. Click **Template**.

   The Number Template dialog box will appear.

7. Type: 999% in the `Input Mask:` field. This will allow you to type any whole number from 0 to 999.
8. If necessary, use the formatting options described in the Creating Templates for Number Fields topic to further customize the field.
9. Click **OK**. The template (999%) will appear in the `Template` field in the Edit the Field list dialog box.

   During actual data entry, TeleMagic will automatically right-justify the number (if you did not select `Left Justify` in step 8, above) and add the percentage (%) sign.

10. Click **Save Field** to end the changes to the field.
11. Choose **OK** to save all changes made during the current editing session and exit the Edit the Field List dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Number_Formats)<<1} Number Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# Creating Templates for Phone Number Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

Phone field templating can also be applied to Fax fields.

Depending on what country you are in and what countries you regularly call, your database may require a variety of phone fields templated to contain numbers of varying lengths. For example, if you are in the United States, US and Canadian phone numbers will be of a standard length, with a fixed number of characters for area code, exchange, and number. International phone numbers, on the other hand, will require country codes, and have a variety of city codes and numbers of variable lengths.

You can use phone field templating to accommodate the different phone numbers you may encounter. Many formats are used for telephone numbers. Therefore, TeleMagic phone fields have no default template. If you do not specify a template for a phone field, you will be able to enter any characters in any format in it.

The Phone Number Template dialog box contains an `Input Mask:` field where you can enter your template characters (formatting characters and literals), descriptions of six formatting characters (input mask symbols), and seven customization check boxes.

The input mask symbols are used as follows:

**A** Indicates that only letters are allowed in this position;

**X** Indicates that any character is allowed in this position;

**9** Indicates that only numbers are allowed in this position;

**#** Stands as a placeholder for numbers, signs (+ and -), and spaces;

**N** Allows either letters or numbers in this position, but nothing else;

**!** Allows any character, but displays everything entered in this position in uppercase.

The default buttons work as follows:

Select **Default US Phone** to automatically enter 999-999-9999 in the `Input Mask:` field. This will automatically place the dashes in the field and specify that the rest of the field must contain numbers.

If you want to be able to store phone extensions in the field, make the field length long enough to contain the extension and add the appropriate number of Xs to the end of the field template. **Example:** 999-999-999 XXXX

Select **Default Intl Phone** to automatically enter 011-###-####-####### in the `Input Mask:` field. This will automatically place 001 in the field (the international access code) and three dashes. The rest of the field can contain numbers, spaces, or signs.

If your selected field length is not long enough to contain the default international template, TeleMagic will automatically set the length to 20.

The formatting check boxes work as follows:

`Letters Only` indicates that only letters are allowed in the entire field.

You will probably not use this setting with phone numbers. If you are using one of the default phone templates, do not use this setting. If you do, you will not be able to enter anything in the field.

`Uppercase` forces all letters in the field into uppercase.

`Center` centers all data in the field.

`Select the field on entry` will cause the entire field to be selected when you click in it.

`Right Align` will override the default left alignment of the phone field, and cause all data to be right aligned.

If you center or right align the field, TeleMagic will format it according to the actual size of the field, not the size of your display. If the field's display on the screen is larger or smaller than the actual field size, it will affect the appearance of centering and right aligning.

`Trim beginning and ending spaces` will clear the field of any spaces at the beginning or end of the field.

This option trims the field of any unused characters. It may only be used if you have created an input mask. (If you did not have a mask, it would view the entire field as empty and you would not be able to enter any data.) This option is useful if you are centering the field, as it will center only the data in the field without the trailing or leading spaces throwing off the alignment.

`Don't save literal characters with the data` will cause literal characters (such as the dashes and parentheses in phone fields) to not be part of the physical data stored in your database. For example, with this check box marked, although a phone field would display as: (619) 555-1465, TeleMagic would only actually store 6195551465. This option can save disk space, especially in large databases, by not taking up storage space for characters that will not change. The tradeoff, however, is that the actual data would not include the literals, thus it would not display as formatted in browse, merge, and reports.

**WARNING!**

Do not use this with the default international number, or any other phone field that has been templated to contain literal numbers that must be dialed. (The default international number includes 011 as literals in the template. Since this number must be dialed when placing the call, it needs to be stored with the rest of the data.)

Be aware that marking this instructs TeleMagic that the literal characters are not included in the data, so it should add them to the display. If you enter data from either list boxes or on group replace with this option selected, make sure that you do *not* include the literal characters in the entry. For example, if you enter (619) 555-1465 in a phone field with this option marked, TeleMagic will know to put in the first parenthesis as the literal, then it will begin to enter your data, in this case, another parenthesis. The final entry would be ((61) 9)5-55-1. (This would, however, display correctly in browse and merge fields.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Set_up_a_US_Canadian_Phone_Number_Template)<<1} To Set up a US/Canadian Phone Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Set_up_an_International_Phone_Number_Template)<<1} To Set up an International Phone Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Character_Fields)<<1} Creating Templates for Character Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Number_Fields)<<1} Creating Templates for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Unique_Number_Fields)<<1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

## To Set up a US/Canadian Phone Number Template:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.
2. Choose a database level from level radio buttons.
3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

The editing screen will become active.

4. Make sure that `Phone` or `Fax` is selected as the field `Type:`.
5. Set the field length to 14 or longer. This will be long enough to accommodate the area code, phone number, and associated spaces and hyphens.
6. Click **Template**.

   The Phone Template dialog box will appear.

7. Click **Default US Phone**.

   The default format will appear in the `Input Mask:` field:


8. If necessary, use the formatting options described in the topic Creating Templates for Phone Number Fields to further customize the field.
9. Click **OK**.

   You will be returned to the Edit the Field List dialog box. The `Template` field will contain your template.

   During actual data entry, TeleMagic will display the field with blanks for the numbers, and will move the cursor automatically to the next blank as you type. You will not have to type the spaces or hyphens.

10. Click **Save Field** to end the changes to the field.

11. Click **OK** to exit the Edit the Field List dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Set_up_an_International_Phone_Number_Template)<<1} To Set up an International Phone Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# To Set up an International Phone Number Template:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.

2. Choose a database level from the level radio buttons.

3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

The editing screen will become active.

4. Make sure that `Phone` or `Fax` is selected in the `Type`: field.

5. Set the field length to 20. This will be long enough to accommodate the international access code, country code, city code, phone number, and associated spaces and hyphens.

6. Click **Template**.

   The Phone Template dialog box will appear.

7. Click **Default Intl Phone**. The template will appear in the `Input Mask:` field:


`011` is the international access code.

`#` is any number, space, or special character.

8. If necessary, use the formatting options described in the Creating Templates for Phone Number Fields topic to further customize the field.

9. Click **OK**.

   You will return to the Edit the Field List dialog box. The template will appear in the `Template` field.

10. Click **Save Field** to end the changes to the field.

11. Click **OK** to exit the Edit the Field List dialog box.

During actual data entry, TeleMagic will display the field with blanks for the numbers, and will move the cursor automatically to the next blank as you type. You will not have to type the hyphens. Since the country code, city code, and number are not constant in length, you must press spacebar to move past remaining blanks in each code group.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Set_up_a_US_Canadian_Phone_Number_Template)<<1} To Set up a US/Canadian Phone Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# Creating Templates for Character Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

Character fields are the fields you will add most often to your database. Character fields can contain any type of data you like. You can allow the field to contain any characters in any combination, or you can template the field to contain specific types of characters at specific points in the field. Character fields usually contain data made up mostly of letters, but in some cases will exclusively contain numbers. (For example, ZIP codes and postal codes are better left as more customizable character fields.)

You will use the Character Template dialog box to customize character fields.

The Character Template dialog box contains an `Input Mask:` field where you can enter your template characters (formatting characters and literals), descriptions of six formatting characters (input mask symbols), and seven customization check boxes.

The formatting characters are used as follows:

**A** Indicates that only letters are allowed in this position.

**X** Indicates that any character is allowed in this position.

**9** Indicates that only numbers are allowed in this position.

**#** Stands as a placeholder for numbers, signs (+ and -), and spaces.

**N** Allows either letters or numbers in this position, but nothing else.

**!** Allows any character, but displays everything entered in this position in uppercase.

The check boxes work as follows:

`Letters Only` indicates that only letters are allowed in the entire field.

If you create an input mask that includes numbers, signs, and spaces, you will not be able to enter data at the location of those formatting characters with this option selected. If you select this option with a template that only includes numbers, signs, and spaces, you will not be able to type in the field.

`Uppercase` forces all letters in the field into uppercase.

`Center` centers all data in the field.

`Select the field on entry` will cause the entire field to be selected when you click in it.

`Right Align` will override the default left alignment of the field, and cause all data to be right aligned.

If you center or right align the field, it will format it according to the actual size of the field, not the size of your display. If the field’s display on the screen is larger or smaller than the actual field size, it will affect the appearance of centering and right aligning.

`Trim beginning and ending spaces` will clear the field of any spaces at the beginning or end of the field.

This option trims the field of any unused characters. It may only be used if you have created an input mask. (If you did not have a mask, it would view the entire field as empty and you would not be able to enter any data.)   This option is useful if you are centering the field, as it will center only the data in the field without the trailing or leading spaces throwing off the alignment.

`Don't save literal characters with the data` will cause literal characters (characters that are the same for all records, such as dashes, parentheses, and percent marks) to not be part of the physical data stored in your database. This option can save disk space, especially in large databases, by not taking up storage space for characters that will not change. The tradeoff, however, is that the actual data would not include the literals, thus it would not display in browse, merge, and reports as it does on the screen.

Be aware that marking this instructs TeleMagic that the necessary literal characters are included in the data, so it should add them to the display. If you enter data from either list boxes or on group replace with this option selected, make sure that you do not include the literal characters in the entry. If you do, it would be added once as data, and once by TeleMagic as part of the template. (The data would, however, display correctly in browse and merge fields.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Number_Fields)<<1} Creating Templates for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1} Creating Templates for Phone Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Unique_Number_Fields)<<1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# Creating Templates for Unique Number Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½MANAGEX_Hint_for_Unique_Number_Fields)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

TeleMagic can create unique, non-editable, sequential numbers that are automatically generated when each new record is added. These fields are useful in generating numbers such as customer ID's, contract numbers, and fulfillment numbers. Unique Number fields are limited to fixed text strings and variable number characters.

Unique number fields will generate sequential numbers. These numbers cannot be edited. If you need to establish a field to contain unique numbers that are not necessarily sequential and need to be hand-entered, you can use a character field instead of a unique number field. (Examples of unique but non-sequential numbers are: Social Security numbers, Dun & Bradstreet reference numbers, and Unit Product Codes.)  When a character field is used, the number will not be automatically generated, but the field can be templated to contain a combination of variable alphanumeric characters. See Creating Templates for Character Fields for more information.

If you have selected `Unique Number` as the field `Type:`, clicking on the **Template** button in the Edit the Field List dialog box will open the Unique Number Template dialog box.

Use the check boxes in this dialog box to build the unique number, one section at a time. As you build the number, it will appear in the `Example:` text box. You can include literals, make various date-related information appear as part of the unique number, or you could simply have an auto-incrementing unique number appear in this field. When you mark a check box, the associated item will be added to the end of the unique number template. The order in which you mark the check boxes controls the order that the items will be shown in the unique number. If you unmark a check box, the associated item will be removed from the template.

**Unique Number Counter** places the counter portion of the unique number into the template. The counter will default to 5 characters. (It can be no longer than the total length of the field.)

**No of digits** controls the number of characters that will be reserved for the counter part of the unique number (the portion that increments for each new record).

**System ID** allows you to include the installation of TeleMagic's System ID as part of the unique number. If you are using Data Synchronization Server, including the System ID is required for keeping the numbers unique. (If you do not include the System ID, multiple sites could add a record on the same day. When the sites are synchronized, these new records may be added to the central installation with the duplicate unique numbers. If the unique number also includes the System ID, each site will have a unique ID and thus the unique numbers will be unique.)

**Literal** makes an unchanging character or string of characters part of the unique number.

**Century** adds the current century to the unique number.

In this context, and in the context of all date-related information in the unique number, "current" refers to the time when the unique number is actually generated (i.e., when the record containing the number is created), not to the time when the template itself was created.

**Year** makes the current year part of the unique number.

**Month Number** makes the number of the current month part of the unique number. (For example, the month number for January would be 01, February would be 02, etc.)

**Month Name** makes an abbreviation of the current month’s name part of the unique number.

**Day of Month** makes the current date part of the unique number.

**Day of Week** makes the current day part of the unique number.

Each item you select will count toward the length you have allotted for the field. If your template exceeds the field length, you will receive a warning. If you receive this warning, either remove items from the template, or increase the field length.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Create_a_Simple_Unique_Number_Template)<<1} To Create a Simple Unique Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Create_an_Advanced_Unique_Number_Template)<<1} To Create an Advanced Unique Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Character_Fields)<<1} Creating Templates for Character Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Number_Fields)<<1} Creating Templates for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1} Creating Templates for Phone Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# To Create a Simple Unique Number Template:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

In this example, we are adding a field which will display a simple, unique number for each record added to a database. For a more complex example of a unique number template, see To Create an Advanced Unique Number Template.

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.

2. Choose a database level from the level radio buttons.

3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

4. Make sure that `Unique Number` is selected in `Type:`.

5. Set the field `Length:` to about 6. This will be long enough to accommodate up to 999,999 unique records.

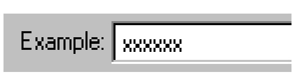
6. Click **Template**.

   The Unique Number Template dialog box will appear.

7. Mark `Unique Number Counter`.

8. In the `No of digits` field, type (or use the spinner arrows to select) 6 and press ENTER or TAB.

   The number of places will appear as a series of x's in the `Example:` text box:




9. If you would like to specify a starting number for the counter, enter it in the `Starting number` field.

10. Click **OK** to exit the Unique Number Template dialog box.

    The Template: text box on the Edit the Field List dialog box will display the template you have just created.

11. Click **Save Field** to end the changes to the field.

12. Click **OK** to exit the Edit the Field List dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Create_an_Advanced_Unique_Number_Template)<<1} To Create an Advanced Unique Number Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Unique_Number_Fields)<<1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Character_Fields)<<1} Creating Templates for Character Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Number_Fields)<<1} Creating Templates for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1} Creating Templates for Phone Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# To Create an Advanced Unique Number Template:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

In this example, we are going to create a template that will generate a unique number for every new contract added to the database. The unique number will use current date information, and will be preceded by the letters CON to indicate that it is referring to a contract.

1. If you have not done so already, from the **File** menu, select **Add / Edit Fields** to open the Edit the Field List dialog box.

2. Choose a database level from the level radio buttons.

3. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

   The editing screen will become active.

4. Select `Unique Number` in the `Type:`.drop-down list.

5. Set the field `Length:` to about 13. This will be long enough to accommodate the various parts of the unique number built into this example.

6. Click **Template**.

   The Unique Number Template dialog box will appear.

7. Mark the **Literal** check box to insert the literal information as the first part of the unique number.

   This allows you to add unchanging characters to your unique number. In this example we are creating a unique number that will be generated for every contract in the database. To indicate this, we will use a literal at the start of the unique number.

8. In the **Literal** text box, type **con** (short for contract). Press ENTER or TAB.

   The literal will appear in the `Example:` text box.

9. Mark the **Year** check box to add the current year to the number template.

10. Mark the **Month Number** check box to add the current month to the number template.

11. Mark the **Day of Month** check box to add the current day's date to the number template.

    The `Example:` will look something like this:


12. In the `No. of digits` field, type, or use the spinner arrows to enter, 4. (This will assign four places to the counter.) Press ENTER or TAB.

    The number of places will appear as a series of `X`'s at the end of the example:

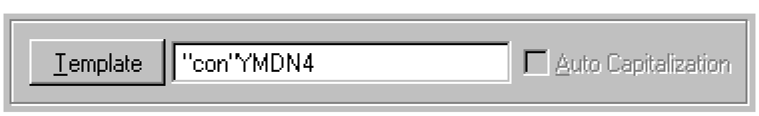
13. Mark the **Unique Number Counter** check box to add the counter section of the number.


Make sure you allow a realistic number of digits in the unique number counter of your template. Four X's will allow 9,999 unique numbers; five X's will allow 99,999; and so on. In our example, because the date will change every day, four digits are more than enough (unless 10,000+ records were being added to the database every day). However, if your unique number template is quite simple, allowing, for example, four unique digits and *nothing else* (no dates, etc.) you will run out of unique numbers the day you add your 10,000th record. When this happens, the counter portion of the unique number will roll over (back to 1). In this case you will end up with records with duplicate numbers. To solve the problem you must change the template to allow at least one more digit.

14. If you would like to specify a starting number for the counter, enter it in the `Starting number` field.

15. Click **OK** to exit the Unique Number Template dialog box.

    The `Template` text box on the Edit the Field List dialog box will display the template you have just created.




**Unique Number (Contract Number) Template**

In unique number templates, "Y," "M," and "D" are place holders for the current two-digit numeric year, month, and day, respectively. "N" followed by a whole number will print a unique number *n* characters long. Fixed text strings (literals) are surrounded by quotation marks.

A unique number will be generated based on this template for every new record added, incorporating the year, month, and day. For example, using the sample template above, on January 1, 2002, TeleMagic would begin assigning a sequential list of contract numbers beginning with: con0201010001. (Unique numbers are filled in automatically. They cannot be edited.)

16. Click **Save Field** to end the changes to the field.
17. Click **OK** to exit the Edit the Field List dialog box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_To_Create_a_Simple_Unique_Number_Template)<<1} To Create a Simple Unique Number Template

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Unique_Number_Fields)<<1} Creating Templates for Unique Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Character_Fields)<<1} Creating Templates for Character Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Number_Fields)<<1} Creating Templates for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_Templates_for_Phone_Number_Fields)<<1} Creating Templates for Phone Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Number_Formats)<<1} Simple Formatting for Number Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Advanced_Configuration)<<1} Advanced Configuration (Validated, Calculated, Default Fields)

# Advanced Configuration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

Advanced configuration includes field validation, calculated values, and default values.

Validation means being able to set criteria that must be reached for data to be accepted in the field. With the Validation option, you create an expression that must evaluate to True before an entry can be made in the field. See: Field Validation

Calculated fields are fields that are automatically filled in based on an expression. An example of a calculated field would be a numeric field designed to contain the sum of two other numeric fields. Users will not be able to add to or change the contents of a calculated field. See: Calculated Fields

Default value fields are similar to calculated fields but are more flexible. In the case of a default value field, a calculation is performed, but the results of that calculation can be edited if necessary. See: Default Fields

When deciding whether to use a calculated field or a default value field, think about whether the value being returned will ever vary. For example, 2+2 will always be 4. In this case, there is no reason for the calculated value to ever be changed. On the other hand, if you have a field designed to pull the first name out of a contact name field (as in the case of a Dear field), you may occasionally need to overwrite the results with a nickname. In this case, a default would better serve.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Customizing_Fields)<<1} Customizing Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Templated_Fields)<<1} Templated Fields

# Field Validation

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

Field validation is a means used to ensure that entries made into a field conform to certain pre-determined standards. In the Contact Manager, you can set validation through a list box which requires that any entry in the field must meet one of the list box items. This type of validation is fairly flexible; if a user wants to make an entry in the field that is not currently valid, all he or she needs to do is add the item to the list box. Field validation handled through the Edit the Field List dialog box allows more rigid control of the field by making the validation criteria one of the field's properties.

Expression validation means that TeleMagic checks to ensure that an entry conforms to the requirements of a formula, or expression. For example, you may want to bar certain users from making entries in a field; or you may want to require that any entries made in a date field be for the current date or later.

## To Create a Field Validation Expression:

1. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

2. Select the `Validated` radio button.

   The **Expression** button will become available.

3. Choose **Expression**.

   The Expression Builder dialog box will open.

4. Enter the validation expression, then choose **OK**. (For help with creating expressions, see the Expression Builder topic.)

   **Example 1:** To create an expression that would bar the user JRC from editing the field, create this expression: **cUserID # "jrc"**

   cUserID is a variable that looks for the current user; # is a logical function meaning "not equal to"; and jrc is the User ID of the user being barred from the field. (The User ID must be entered in quotation marks.)

   **Example 2:** To require that the entries in a date field named Due on Level 2 must be for today's date or later, create this expression: **Contact2.Due >= date()**

   Contact2.Due is the field name (if you are adding the field at this time, it will not yet be available on the `Fields` list; you will have to enter it in by hand); >= is a logical function meaning "greater than or equal to"; and date() is a date function referencing the current system date.

5. If you would like to further customize your field, see Customizing Fields for instructions.

**or** Choose **Save Field**.

The new field prompt and name will appear highlighted on the field list. The field name will appear in brackets to the right of the prompt.

6. Choose **OK** to exit the Edit the Field List dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Database_Rebuild)<<1} Database Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Calculated_Fields)<<1} Calculated Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Default_Fields)<<1} Default Fields

# Calculated Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

*Calculated fields* draw upon data from other fields to calculate entries such as sales totals or future dates. The values are calculated and filled in whenever the data upon which they are based changes. You cannot type over or otherwise manually change calculated fields. When creating a calculated field, you will use an expression to indicate which fields are to be used, and what operations are to be performed using data from those fields.

Because the expression in a calculated field of itself validates the field, you will not be able to use the Validation feature with a calculated field.

## To Create a Calculated Field:

1. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

2. Select the `Calculated` radio button.

   The **Expression** button will become available.

3. Choose **Expression**.

   The Expression Builder will appear.

4. Build the calculation expression. (For help with building expressions, see the Expression Builder topic.)

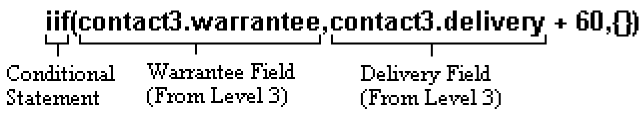
   Use the `Fields` list to choose from a list of field names. Use the `Variables`, `String`, `Logical`, `Math`, and `Date` lists to choose from sets of related operators and functions.

   **Example 1:** Calculated Date (Shipping Date). In the Documentation database, we assume that the product shipping date is two weeks after the contract date. For the field {shipdate}, we can calculate the shipping date by adding 14 days to the date in the {condate} field. From the Fields list, choose the field name Contract Date {condate}; then type 14. Your expression will look like this:

   **Contact3.condate+14**

   (If you want to place the date information into a character field, place the above expression inside the parentheses in the dtoc() date function to convert the date to character.)

   **Example 2:** Conditional Calculated Date (Warrantee Expiration). In the Documentation database, if the product has a warrantee, the warrantee expires 60 days after the product delivery date. This requires a conditional expression, also known as an iif statement:




In this example, the translation of the above statement would be: “If the Warranty? check box on the Sales Contract screen is marked, add 60 days to the date in the Delivery Date Field on that screen; otherwise leave this field blank.”

5. When the expression is complete, choose **OK**.

   TeleMagic will close the Expression Builder and enter the expression on the editing screen.

6. If you would like to further customize your field, see Customizing Fields for instructions.

7. Choose **Save Field** to save the field.

8. Choose **OK** to exit the Edit the Field List dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Database_Rebuild)<<1} Database Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Field_Validation)<<1} Field Validation

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Default_Fields)<<1} Default Fields

# Default Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ï¿½ )<<1}

Default values draw upon data from other fields to calculate default entries. Default values are entered automatically whenever you add a record. They can be typed over or changed as necessary.

Unlike calculated fields, if you change the data in the field(s) on which the default is based, the default will not be reevaluated. In cases where you have changed the default value, this will prevent your entry from being overwritten.

TeleMagic will fill in default values only when you add a record. They will not be filled in when importing records. This is to prevent overwriting any information that may already be in the field when you import a record. During import, if there is no data in the field it will remain blank.

When creating default fields, you will use expressions to indicate which fields are to be used, and what operations are to be performed using data from those fields.

## To Create a Default Value:

1. If this is a new field, choose **Add** and add the field following the instructions under To Create and Define a New Data Field from the File Menu.

**or** If you are changing an existing field, highlight the field and choose **Change**.

2. Click **Default Value**.

   The Expression Builder will open.

3. Create an expression to define what should be entered in the field by default. You can enter literal text in quotation marks, or create an expression that will pull data from other fields.

   **Example:** Fill-in (Dear). Assuming that names are entered first name, space, last name, if you enter this expression into the Dear: {rdear} field of the first level (Contact Data) of the Documentation database, it will find the first name in the Contact Name field and place it in the Dear: field:

   **left(contact2.contact,at(“ ”,contact2.contact)-1)**

   In this example, the translation of the above statement would be: “Starting from the left of the Contact field, return everything up to the last character before the first space.”

4. Choose **Save Field** to save the field.

5. Choose **OK** to exit the Edit the Field List dialog box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Field_Validation)<<1} Field Validation

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Calculated_Fields)<<1} Calculated Fields

# Deleting Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

From time to time, you will find it necessary to delete fields from your database. You may want to optimize your field structure, or free up some disk space.

If you delete a field from a database that is used as a Contact Key Field , you should assign a new field in the Contact Key Field screen. See the Key Field Preferences topic.

## To Delete a Field:

1. From the **File** menu, select **Add / Edit Fields**.

   The Edit the Field List dialog box will open.

2. Select the level from which you want to delete the field.

3. Highlight the field to be deleted.

4. Click **Delete**.

   A message will appear asking you to confirm your decision to delete.

5. Click **Yes**.

   The field will be deleted.

6. Click **OK** again to exit the Edit the Field List dialog box.

**or** Select another field, and return to step 4.

7. If the deleted field(s) were displayed in views, remove them from each page where they appeared.

8. Perform a rebuild on the affected database, following the instructions in Database Rebuild.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MANAGE_To_Delete_a_Database)<<1} To Delete a Database:

# Database Rebuild

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Add/Edit Fieldsï¿½ ï¿½ ï¿½ )<<1}

As soon as you have finished creating, defining, or customizing data fields, you must rebuild your database. If you do not, the new field names will not be available to you in various program lists and the Screen Designer, and TeleMagic will not be able to record or save information into those fields.

In addition to rebuilding a database when it has been changed, performing complete rebuilds is essential to optimization and maintenance of TeleMagic. For instructions on performing a complete rebuild, see the Rebuilding Data (Rebuild) topic.

Follow the instructions below to perform a simple rebuild that will affect the current database, only.

## To Rebuild a Database:

**WARNING!**
All other users must be out of the database(s) before performing a rebuild.

1. From the **File** menu, select **Rebuild**.

   The Rebuild dialog box will appear.

2. Click the **Database** button to select the databases you have changed and would like to rebuild.

   A Database Files dialog box will appear.

3. Select the database(s) you want to rebuild and click **Add**.

4. Choose **OK**.

   You will return to the Rebuild dialog box.

5. Make sure that the `System`, `Global`, `User Tables`, and `Floating` check boxes are *not* marked.

6. Choose **OK**.

   The database will be rebuilt, and a status bar will keep you up to date on progress.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Creating_and_Defining_Fields)<<1} Creating and Defining Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MANAGE2_Customizing_Fields)<<1} Customizing Fields

## Hint for Database Installation

When you are just starting, it is easiest to install an existing database, rather than starting with a blank screen. The sample databases included with TeleMagic are there to guide you in setting up your own custom layouts to hold your own information. If you are not familiar with screen design, we recommend that you install and modify these databases rather than add a blank database.

## Hint for Step 11

The `Description` field will provide a brief description the highlighted database. As you select databases the `Space Required` section will display how much total disk space is required for the selected databases. The `Space Available` display will show how much space is available in the path specified in step 7.

## Note for Step 11

If you select a database that already exists, it will be added with `Copy 1 of` preceding the database name.

## Hint for Making Your Own Database

Schedule regular rebuilds of your database, especially if they contain notepads, to ensure maximum speed. This is covered in the Rebuilding Data topic.

## Note for Step 5

If you copy contact data, any activities linked to the contact records will remain linked to the original record in the source database.

## Hint for Step 5

If you have explored one of the sample databases and would like to use it to store your records, rather than deleting the sample records, you can make a copy of the database and unmark `Copy Contact Data`. This will create an empty database, ready for your new records.

## Note for Step 11

After you have added fields to this database, do not forget to rebuild the database again before using it.

## Note for Step 4

Any activities linked to contact records in the database will be retained in your calendar. They will no longer be linked to a record.

## Note for Step 1

These instructions cover the minimum rebuild required before accessing your new database. For complete rebuild instructions, see the Rebuilding Data topic.

## Note for Step 2

Unless you are certain that no other users are in TeleMagic, it is important that you only rebuild the database and not any of the installation files.

## Note for Step 5

If a database was open when you accessed this dialog box, it will be selected by default. Remove this database from the `Databases to rebuild` list by highlighting it and clicking **Remove** before proceeding.

## Note for Step 4

You must have unique field prompts for all fields in your database. If you want to display the same prompt for more than one field (for example City fields on different levels), create a text label in the Screen Designer for one of the fields instead of displaying the prompt. (See Screen Designer: Text Tool for details.)

## Note for Step 5

You will not be able to have a field name that starts with a number, symbol, or a space.

## Note for Step 6

If you have selected OLE, Check Box, Memo, or Date as the field type, a pre-set field length that cannot be changed will appear in the `Length:` field. If this is the case, skip the next step.

## Note for Step 7

The field must be long enough to accommodate the maximum total number of characters you are likely to type into that field. TeleMagic will not save excess characters. If you try to enter more characters than the field can accommodate one of two things will happen, depending on your preferences. If you have `Force "Tab" Every Field` marked in Display preferences, it will continue to replace the last character in the field until you stop typing. (For example, if you have a field with only three characters, when you type the fourth character, and every character after this, it replaces the third character, so typing “Dear” will read "Der".)  If you do not have `Force "Tab" Every Field` marked, excess characters will be placed into the next field.

## Hint for Step 7

If you are setting up a fax field, consider adding another character to the length for the pipe ( **|** ) character. (This is used in faxing to instruct TeleMagic to not send faxes to the number in fields containing the pipe character. This allows you to maintain a record of the fax number, but prevent faxes from being inadvertently sent to it. This is particularly useful if you have received a request from a contact that no faxes be sent, especially if this request is for a limited duration, such as while the contact is on vacation.)   You may also want to consider making the fax field view-only so that non-supervisor users are not able to edit the pipe character out of the field. (See the topic *Security* for details on field level security.)

## Note for Step 8

In numeric fields, the number of decimal places must be at least one less than the total field length. (This will allow you to account for the decimal places plus the decimal point.)

## Hint for Step 9

Word processors have a maximum number of fields which can be displayed in the Merge Field list. (This number will vary by word processor; it is usually not over 150 fields.) Once that maximum has been reached, any additional fields will not be shown. This is especially an issue if you are merging from Level 3, as fields from all three levels will be included in the merge. To avoid this, and the problem of having to scroll through a long list of fields, it is recommended that you exclude any fields which will not be used in documents from the Merge Field list.

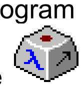
## Hint for Step 11

This option is useful if the field is to contain proper names, titles, or other information that is generally capitalized.

## Note for Step 11

If you have names that begin with Mc or Mac, such as MacKay, TeleMagic will correctly capitalize them. If you have acronyms, such as IBM, TeleMagic will only know to capitalize it if each letter is separated by a period (e.g., I.B.M.).

## Hint for Step 7

If the currency symbol you would like to use does not appear on your keyboard, you can use the Windows Character Map in the Windows Accessories Program Group or Folder to find the keyboard command that will generate the symbol. Double-click the  icon in the Accessories group or folder to open the Character Map. Use the list of fonts to locate the currency symbol you would like to use. At the lower right-hand corner of the Character Map dialog box you will see a line that says `Keystroke:`, then the keystroke needed to generate the selected character. (For example, the keystroke for the £ character in Times New Roman font is ALT+0163.) In the Currency Symbol field in TeleMagic, type the keystrokes needed to generate the desired currency symbol. (Following the above example, hold down the ALT key and type 0163. £ will appear in the `Currency Symbol:` field.)

## Hint for Step 5

You can configure your decimal and thousands separator display. See Number Display for more information.

## Hint for Templated Fields

Templates can prevent data entry errors and save keystrokes. By setting up templates for highly-structured fields, you can prevent data entry mistakes such as typing special characters or the letters “O” and “I” instead of the numbers 0 and 1.

## Note for Step 9

This template causes automatic display of the percentage sign only. It does not convert decimal fractions to a percentage.

## Note for Step 11

If prompted to do so, perform a rebuild on the database before proceeding. (See the Database Rebuild topic.)

## Hint for Step 8

If you are setting up a fax field, consider adding another character to the template for the pipe ( | ) character. (The pipe character is used in faxing to instruct TeleMagic to not send faxes to the number in the field as long as the pipe character is found in the field. This allows you to maintain a record of the fax number, and still prevent faxes from being inadvertently sent to it. This is particularly useful if you have received a request from a contact that no faxes be sent, especially if this request is for a limited duration, such as while the contact is on vacation.)   You may also want to consider making the fax field view-only so that non-supervisor users are not able to edit the pipe character out of the field. (See the topic *Security* for details on field level security.)

## Note for Step 11

If prompted to do so, perform a rebuild on the database before proceeding. (See: Database Rebuild for instructions.)

## Note for Step 11

If prompted to do so, perform a rebuild on the database before proceeding. (See: Database Rebuild for instructions.)

## Hint for Unique Number Fields

Once you have created a unique number template, if you want any existing records in your database to receive the unique number, use the Reset Unique Numbers feature to assign a unique number to the existing records. See the Resetting Unique Numbers topic for more information.

## Note for Step 10

In unique number templates “N” followed by a whole number will print a unique number *n* characters long.

## Note for Step 12

If prompted to do so, perform a rebuild on the database before proceeding. (See: Database Rebuild for instructions.)

## Note for Step 17

If prompted to do so, perform a rebuild on the database before proceeding. (See: Database Rebuild for instructions.)

## Hint for Step 4

If you would like to validate against information in existing fields or using variables, you can select them from those drop-down lists. If you would like to validate against information in the field you are currently creating, you must enter the field name manually at that time. (Enter Contact1, 2, or 3, depending on the level, a period, then the field *name*.)   For example, for a field named Average on Level 2, type: **contact2.average**.

## Note for Step 1

You cannot select Memo, Phone, OLE, or Unique Number fields for use with the calculated field feature.

## Hint for Step 7

If another calculated field is contained in the expression for this field, you should set the calculation order. Click here for details.

## Note for Step 1

You cannot select Memo, OLE, or Unique Number fields for use with the default value field feature.

## Note for Step 3

For help with creating expressions, see the Expression Builder topic.

## Note for Step 4

If the field you have chosen to delete is used as part of other fields (for example, if a calculated field uses it; or if it appears as part of a rollup list) you will receive a warning message informing you that the field is used in a rollup or calculation. You must first remove the field from the applicable rollup and/or calculation before deleting it. Click **OK** to close the message. Locate the field that is using this field in a calculation and remove it from the calculation. If the field is being used in a rollup list, use the Screen Designer to change the rollup list so it no longer includes the field. When the conflict has been resolved, return to step 1, above. (For more on using the screen designer, see the Screen Designer topic.)

## Note for Step 3

Only select a database if you are certain that no other users are currently working in that database.

## Note for Step 5

If you want to rebuild any of these other areas of TeleMagic, it is strongly recommended that you refer to the Rebuilding Data topic before proceeding.

## Note for Step 13

You may receive a message or warning concerning the selected length of your Unique Number Counter. In some cases, the issue will be resolved automatically. In others you will be informed that there may be duplicate unique numbers if you keep your current selections.

## Note for Step 5

The name of the directory cannot exceed 8 characters, including the period (.) character (if used).

## Note for Step 4

Field validations are case sensitive.

## Documentation Conventions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

This help file uses the following standards when documenting TeleMagic features:

Graphics
Secondary Window
Keyboard Conventions
Mouse Conventions
Text Conventions
Symbols

## Graphics

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

When you are instructed to take an action that opens a dialog box, the name of the dialog box will often be a help jump.

**Example:**

The Calculator will open.

Click on the dialog box name to open a pop-up window containing a picture of the referenced dialog box.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Secondary_Window>second)<<1} Secondary Window
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Keyboard_Conventions)<<1} Keyboard Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Mouse_Conventions)<<1} Mouse Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Conventions)<<1} Text Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Symbols)<<1} Symbols

## Secondary Window

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

A secondary help window is one that opens on top of the main help window. When reviewing the help topics, you will occasionally be referred to another topic for additional information relating to the current topic. For example, when printing word processing documents, a cross reference is provided to a topic on creating documents. Rather than leave the current topic, another window with the related information will open, while your original information remains accessible. You can review the secondary information then close the window, or you can leave it open and compare the two topics side-by-side.

If you access context sensitive on-line help from a dialog box, you will be given the option of accessing step-by-step instructions on the related feature. If you select this option, the secondary window that opens will remain on top of any other dialog boxes or programs. You can work in TeleMagic without sending the related help information behind the TeleMagic window.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Keyboard_Conventions)<<1} Keyboard Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Mouse_Conventions)<<1} Mouse Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Conventions)<<1} Text Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Symbols)<<1} Symbols

## Keyboard Conventions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

- **Key Names**: Key names are always shown in all capital letters. For example, the Escape key is shown as ESC; the Control key is shown as CTRL.

- **Arrow Keys**: Arrow keys on the keyboard are shown as UP ARROW, DOWN ARROW, LEFT ARROW, and RIGHT ARROW, respectively.

- **Keystroke Sequences**: Keys that are pressed sequentially are separated by a comma (,). For example, S, A indicates that you should first press S, then release S and press A.

- **Keystroke Combinations**: Keys that are pressed simultaneously are noted with a "+" sign between keystrokes. For example, CTRL+S indicates that you should hold down the CTRL key, then press the S key (while still holding down the CTRL key), then release both keys.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Secondary_Window)<<1} Secondary Window
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Mouse_Conventions)<<1} Mouse Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Conventions)<<1} Text Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Symbols)<<1} Symbols

## Mouse Conventions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

- TeleMagic manuals assume that the left mouse button has been set up as the primary button. If your mouse is configured differently, click on whatever button is appropriate when you are instructed to click on a specific button.

- **Click**: This instruction requires you to point at an object, then press and release your primary mouse button quickly.

- **Double-Click**: When you see this instruction, point at an object, then press and release your primary mouse button twice in quick succession.

- **Right-Click** To right-click, place your cursor on the object or control indicated, then press and release your right button. If you have set up your mouse in a non-default configuration, press and release the button that you are using as the right button. You can achieve the same effect as right-clicking by pressing SHIFT+F10.

- **Click and Drag** or **Drag**: At this instruction, point at an object, then press and hold down the primary mouse button while you move that object.

- **Drop**: Usually after dragging an object you will be told to drop it, which means to release the primary mouse button.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Secondary_Window)<<1} Secondary Window
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Keyboard_Conventions)<<1} Keyboard Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Conventions)<<1} Text Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Symbols)<<1} Symbols

# Text Conventions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

**Verbatim Entries**: Text you must type verbatim is shown in bold. For example, if you are instructed to enter: **xxx**, you would type the letters: xxx (in lowercase). If uppercase letters are required, text will be shown in uppercase.

***Optional Entries***: If you have an option of what you can enter, a place holder is shown in bold italics. For example, if you were to enter the name of your database, the instructions would tell you to type the ***database_filename***. For a database called Contacts, you would type **contacts**.

`On-screen Text:` Field names, check boxes, and any other text that appears on the TeleMagic screen will be shown in this typeface: `Example of on-screen text`.

**Menu Options** and **buttons** will be shown in bold face text.

PATH AND FILE NAMES: File, program, and directory names are shown in all capital letters. For example, a file stored on your hard drive in the directory containing the TeleMagic program files might have the path and file name C:\TM4\PROGRAMS\TM.EXE.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Secondary_Window)<<1} Secondary Window

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Keyboard_Conventions)<<1} Keyboard Conventions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Mouse_Conventions)<<1} Mouse Conventions

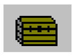
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Symbols)<<1} Symbols

## Symbols

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Documentation Conventionsï¿½ ï¿½ ï¿½ )<<1}

•

This symbol indicates a one-step procedure, or a set of alternative procedures.



Additional information concerning a particular topic is denoted by this symbol.

•

Additional information concerning the current step is indicated by this symbol. To view the notes for a particular step, simply click on the graphic.

**WARNING!**
Indicates precautionary information. Please read carefully before proceeding.

•

This is information from our file of technical tips and tricks.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Secondary_Window)<<1} Secondary Window
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Keyboard_Conventions)<<1} Keyboard Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Mouse_Conventions)<<1} Mouse Conventions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Conventions)<<1} Text Conventions

# Basics of Using TeleMagic Enterprise

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

TeleMagic consists of menus, windows, and dialog boxes that make it easy for you to use the program. You will use standard Windows commands when working with TeleMagic. TeleMagic documentation assumes the user possesses a basic knowledge of Microsoft Windows. If you are not familiar with standard Windows commands, refer to any of the Related Topics below for help. A comprehensive glossary of terms used in this documentation is available at any time by clicking the **Glossary** button at the top of the Help window.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½MASTER_Starting_The_Program_and_Logging_In)<<1} Starting The Program and Logging In

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½MASTER_Using_Menus)<<1} Using Menus

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½MASTER_Using_the_Toolbar)<<1} Using the Toolbar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½MASTER_Working_with_the_TeleMagic_Window)<<1} Working with the TeleMagic Window

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½MASTER_Handling_Error_and_Warning_Messages)<<1} Handling Error and Warning Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½MASTER_Saving_Settings_and_Exiting_TeleMagic)<<1} Saving Settings and Exiting TeleMagic

# Starting The Program and Logging In

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½MASTERX_Starting_The_Program_and_Logging_In_Note )<<1}

## To Start TeleMagic:

1. Start Windows and access your desktop in Windows 95.
2. Click the **Start** button on the Taskbar, then select **Run** from the Start menu to open the Run dialog box. Enter the path to the file TM.EXE in the TeleMagic programs directory (C:\TM4\PROGRAMS by default).

**or** Find and double-click the TeleMagic program icon:

The icon may be in a program group window or folder of its own, or it may be in one of your previously existing groups or folders.

Your copy of TeleMagic may have been installed so that you are automatically logged in and a specific database is automatically opened to a particular a view and page. If so, you will not see the following dialog boxes.

TeleMagic will start, flash through the license screen, and display the TeleMagic menu bar and Login dialog box.

3. Type your three-character `User ID`.

   The cursor will move to the `Password:` field.

4. Type your password.
5. Click **OK**.

   Depending on your setup, one of two things may happen. If a default database and view have been defined, the Contact Manager will open.

   If no defaults have been defined, the Select Database selection will open.

   This selection box will contain a list of all of the databases in this installation of TeleMagic. Before you can continue, you must select a database if you want to associate your scheduling, word processing, and other functions to specific contacts.

6. Highlight the database you want to open and click **Open**.

   The Select Database selection box will disappear and the database you selected will open.

TeleMagic allows you to add fields to a database and put those fields on the screen in any way you like. TeleMagic recognizes the fact that not everyone will want to see those fields in the same way, so it allows you to create multiple views to display your data in different ways. A view is a set of pages that make up one database level. (Each level may have more than one view.) If there is more than one view in a database, you must select a view the first time you open it.

7. If there are multiple views and no default view has been selected, the Select View dialog box will open. Select the appropriate view from the list, and click **Select**. The Contact Manager will open to the selected view.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TIPTRICK_Using_Multiple_Sessions_of_TeleMagic_on_One_Workstation)<<1} Using Multiple Sessions of TeleMagic on One Workstation

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Saving_Settings_and_Exiting_TeleMagic)<<1} Saving Settings and Exiting TeleMagic

# Using Menus

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

The TeleMagic menu system consists of the menu bar, menu pads, menus, and menu options. Use the following guidelines when using menus:

Hot Keys
Main Menu Bar
Menu Pads
Menus
Menu Options

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Using_Shortcuts_for_Menu_Options)<<1} Using Shortcuts for Menu Options
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Saving_Settings_and_Exiting_TeleMagic)<<1} Saving Settings and Exiting TeleMagic

## Hot Keys

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

TeleMagic provides shortcuts when working with menus. These shortcuts are called *hot keys*. The hot key is the letter that is underlined on the menu. For example, the hot key for the **Archive** option on the menu is the **c**. Hot key combination do not necessarily work on certain international and Dvorak style keyboards.

## Main Menu Bar

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

The *main menu bar* is located at the top of the screen and displays titles for menu selection. The titles along the menu bar are called *menu pads*. The contents of the menu bar can change when you access different parts of TeleMagic. Taking different actions may cause menu pads to be added, removed, or dimmed on the menu bar.

## Menu Pads

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

*Menu pads* appear along the menu bar and show the names of the menus. Sometimes menu pads appear dimmed (in gray) and cannot be chosen. A dimmed (grayed) menu pad is disabled.

To select a menu pad with a mouse, move the mouse pointer to your selection and click.

To access the menu bar from the keyboard, press the ALT key or F10. Use the left and right arrow keys to move between menu pads or select the hot key for the desired menu pad.

Highlighting indicates that a menu pad is selected or about to be chosen.

# Menus

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

When you choose a menu pad from the menu bar, TeleMagic displays a menu. A *menu* is a list of related options. When you choose an option from a menu, you are telling TeleMagic to take an action. You activate a selected (highlighted) option by clicking with the mouse or by pressing ENTER. If a menu pad appears dimmed, it cannot be chosen. A dimmed menu pad is disabled.

To display a menu using the mouse, move the pointer to a menu pad and press the mouse button. The menu will remain on the screen until you either choose an option, or move the mouse anywhere off the menu.

To access a menu using the keyboard, press either the ALT or the F10 key, then the hot key (the underlined character) in the menu pad name. To deactivate a menu without choosing an option, press ESC, ALT, or F10.

## Menu Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½MASTERX_Hint_for_Menu_Options)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

Menus consist of options (also referred to as items). Logical groups of menu options are separated by horizontal lines within a menu. Choosing a menu option starts a TeleMagic action. When a menu option appears dimmed, it is disabled and cannot be chosen.

To choose a menu option with a mouse, open the menu then click on the desired option.

To use the keyboard to choose a menu option, open the menu then choose a menu option by pressing the underlined letter for the option, or use the UP ARROW and DOWN ARROW keys to move to your menu choice. Press ENTER to select the highlighted option.

## Using the Toolbars

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

The system toolbar is located directly below the Main menu bar, and provides quick access to TeleMagic's most commonly used commands. The system toolbar can be customized to hold buttons which represent the menu commands that you use most often.

There are two Contact Manager toolbars which are used primarily to navigate your database and control how you view your records. One of the Contact Manager toolbars, the Primary Contact Manager Toolbar, is configured by default. The Secondary Contact Manager Toolbar must be configured before it will appear.

You can move any of the toolbars to any location on the screen. If you drop a toolbar near one of the screen edges, it will snap to a docking port. When you return to TeleMagic after moving toolbar, the relative position of toolbars in a docking port may have changed, but they will remain in the docking port where they were last dropped. Toolbars that are floating (left somewhere other than a docking port) will retain their positions.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Customizing_the_Toolbar)<<1} Customizing the Toolbar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Saving_Settings_and_Exiting_TeleMagic)<<1} Saving Settings and Exiting TeleMagic

# Customizing the Toolbars

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

You are not limited to using the default toolbars. TeleMagic provides tools for most of the features included with the program, and additionally allows you to create your own tools. Customizing your toolbars can save a lot of time and energy. There are three kinds of tools that can be added to the System toolbar:

- Pre-defined tools which call menu options usually available from the Main menu system
- User-defined tools that call user-defined function keys
- User-defined tools that start external programs

Customizing the menu is covered in detail in the Toolbar Configuration topic.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½MASTER_Using_the_Toolbar)<<1}

# Dialog Box Actions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

When using a mouse within dialog boxes, click the appropriate options. To move the entire dialog box, drag the title bar.

The following keys move you around a dialog box if you are using a keyboard:

| **Key** | **Function** |
|---|---|
| ESC | Exits the dialog box without taking action. |
| ENTER | Chooses the default button. The default button has a darker border than the other buttons in the dialog box. |
| TAB | Selects the next dialog control. |
| CTRL+TAB | Exits memo fields and moves to the next field. |
| SHIFT+TAB | Selects the previous dialog control. |
| UP ARROW, DOWN ARROW | Within a list, moves up and down the list, item-by-item. |
| HOME, END | In a list, moves to the first or last item in the list. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Check_Boxes)<<1} Check Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Radio_Button)<<1} Radio Button

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Boxes_and_Drop_Down_Lists)<<1} Text Boxes and Drop-Down Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Buttons)<<1} Buttons

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

## Check Boxes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

A *check box* is an empty box followed by text. Check boxes turn settings on and off. A check in the box means the setting is on. More than one box in a group may be checked. To use the check box, do one of the following:

When using a mouse, click a check box to mark it. Click again to clear the mark.

If you are using a keyboard, press ALT plus the item’s hot key; or navigate to the check box with your ARROW keys or the TAB key. Mark the check box by pressing the SPACEBAR.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Dialog_Box_Actions)<<1} Dialog Box Actions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Radio_Button)<<1} Radio Button

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Boxes_and_Drop_Down_Lists)<<1} Text Boxes and Drop-Down Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Buttons)<<1} Buttons

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Radio Button

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

A *radio button* is a hollow circle followed by text. Only one radio button in a group may be chosen at any given time. When a radio button is chosen, it appears filled and the previously chosen radio button will be de-selected. To select a radio button, do one of the following:

When using a mouse, click the radio button to choose it.

If you are using a keyboard, press ALT plus the desired item's hot key; or use the ARROW keys to move to a radio button, then press the SPACEBAR to select it.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Dialog_Box_Actions)<<1} Dialog Box Actions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Check_Boxes)<<1} Check Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Boxes_and_Drop_Down_Lists)<<1} Text Boxes and Drop-Down Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Buttons)<<1} Buttons

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Text Boxes and Drop-Down Lists

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

Text boxes indicate an editable text area where you may enter text. For example, the notepad is a text area. To enter text, click in the text box to position the cursor, then type or edit.

A Windows drop-down list is indicated by this button: ● . To display the list:

- With your mouse, click on the arrow button. When the list box is displayed, click the appropriate option to choose it.

- Scroll arrows will appear along the edge for longer lists. If necessary, you can click the arrow at either end to scroll up or down through the list.

- If you are using keyboard controls, press the tab key to move to the arrow button and press the SPACEBAR. Use HOME or END to move to the first or last option on the list. To select an option, use the UP ARROW and DOWN ARROW keys to move to the option, then press the SPACEBAR.

- If a list is alphabetized, type the first letter of an item you want to locate to navigate to the first option on the list starting with that letter. Scroll down until you locate the desired item, if necessary. (The letters you type will not appear on the screen.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Dialog_Box_Actions)<<1} Dialog Box Actions
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Check_Boxes)<<1} Check Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Radio_Button)<<1} Radio Button
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Buttons)<<1} Buttons
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Buttons

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

A *button* is a box that contains key words or pictures that describe the action it starts. Select a button by either clicking it with your mouse, or by using the keyboard to move to the button and then pressing the ENTER key. (The currently selected button has a darker border than the other buttons in the dialog box.) If a button is dimmed, it is not available. Choosing a button that includes an ellipsis (...) will open another dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Dialog_Box_Actions)<<1} Dialog Box Actions

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Check_Boxes)<<1} Check Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Radio_Button)<<1} Radio Button

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Text_Boxes_and_Drop_Down_Lists)<<1} Text Boxes and Drop-Down Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Working with the TeleMagic Window

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

Within Windows you may control windows in several ways. You can open and close windows, as well as hide, move, size, minimize, maximize, and scroll most windows. You will use standard Windows commands when working with the TeleMagic window.

Use the following guidelines when working with the TeleMagic window:

Minimizing TeleMagic
Sizing the Main Window
Moving Windows

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Starting_The_Program_and_Logging_In)<<1} Starting The Program and Logging In
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Saving_Settings_and_Exiting_TeleMagic)<<1} Saving Settings and Exiting TeleMagic

# Minimizing TeleMagic

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

The Minimize button is located in the upper right-hand corner of the TeleMagic window: . Minimize a window with the mouse by clicking on the Minimize Button. When a window is minimized, the taskbar will still display a button with the program name and icon.

To restore the window to its original size, click the appropriate button on the taskbar.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Sizing_the_Main_Window)<<1} Sizing the Main Window

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Moving_Windows)<<1} Moving Windows

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Sizing the Main Window

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

The TeleMagic window can be re-sized using the Restore button located in the right-hand corner of the main title bar (). After you have clicked this button, you will be able to precisely control the dimensions of your window by positioning your mouse pointer over the edge of the window and dragging to a new size as soon as the pointer changes to a double headed arrow:

If you have **Save Settings on Exit** selected from the **Options** menu (see Saving Settings and Exiting for details), when you exit and re-enter TeleMagic, your window will remain the last size you specified.

Because TeleMagic allows you to control the size of the contact page, this is especially useful if you would like to resize your window to fit the page.

If your TeleMagic window is extremely narrow, the Main menu will display in two rows. The toolbars will remain in position, displaying as many buttons as will fit. Take into account the length of the toolbars when sizing your window.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Minimizing_TeleMagic)<<1} Minimizing TeleMagic
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Moving_Windows)<<1} Moving Windows
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Moving Windows

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

Using a mouse, point to the window title bar and drag the window. Release the mouse button when the window is in its desired location. (This applies to moving both dialog boxes and the TeleMagic main window.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Minimizing_TeleMagic)<<1} Minimizing TeleMagic

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Sizing_the_Main_Window)<<1} Sizing the Main Window

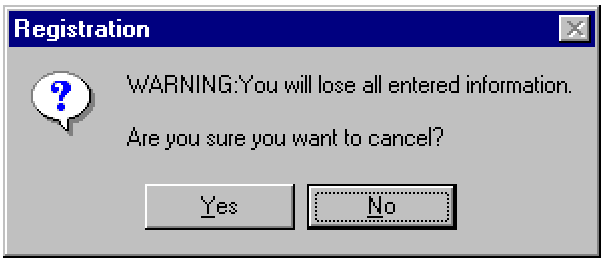
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Handling Error and Warning Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

A warning or error message appears on the screen if you ask TeleMagic to do something it cannot do; if there is something that you must do before you can continue; or if you are about to do something that may destroy information.

This is an example of a warning message:




**Sample Warning Message**

### To Remove a Warning Message:

- When using a mouse, click the appropriate button.
- Using the keyboard, press TAB to move to the appropriate button, then press ENTER.

If the warning message has no buttons, either remove it by clicking the mouse button, by pressing the ESC key, or by following the action recommended in the warning message.

Generally, once you remove a warning message, you may continue your original action.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Starting_The_Program_and_Logging_In)<<1} Starting The Program and Logging In
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Saving_Settings_and_Exiting_TeleMagic)<<1} Saving Settings and Exiting TeleMagic

# Using Shortcuts for Menu Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

Key shortcuts allow you to choose menu options without displaying the menu. The chart below shows the currently available Shortcut options for TeleMagic.

| **Keys** | **Function** |
|---|---|
| ALT+F4 | Exit TeleMagic |
| CTRL+F4 | Close a window |
| CTRL+F7 | Move a window |
| CTRL+X | Cut the selected text to the clipboard |
| CTRL+C | Copy the selected text to the clipboard |
| CTRL+V | Paste the contents of the clipboard at the cursor position |
| CTRL+A | Highlight the entire contents of a field |
| ALT+I | Insert a text file into a memo region |
| ALT+E | Export the contents of a memo region to a text file |
| CTRL+P | Paste the address information from the current record to the clipboard |
| CTRL+Q | Quick Add a record |
| ESC | Exit current edit without saving<br>Exit dialog box without taking action |
| CTRL+Z | Used with the ZIP Code lookup add-on feature |

**Key Shortcuts**

TeleMagic also comes with default settings for some of the function keys (F1-F10). The default settings are listed below. Other function keys can readily be set up using Preferences. (See the Preferences topic for more information on creating function keys.)

| **Keys** | **Function** |
|---|---|
| F1 | Activate on-line help |
| F2 | Display user-defined list box |
| F10 | Activate/deactivate the system menu bar (same as ALT) |

**Default Function Keys**

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½MASTER_Using_Menus)<<1}Using Menus

# Security

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

The subject of security is covered in detail in the *System Administrator Guide*.

TeleMagic security entails granting enough rights to allow users to perform their job functions, while keeping control of sensitive areas in the hands of those who are responsible for their maintenance. If you are not able to access a TeleMagic feature, there is a good chance that you do not have security rights to it. As a general rule, security will be handled by the system administrator. If you are unable to access a TeleMagic feature, contact your system administrator about your security rights.

In addition to the installation-wide security controls, non-supervisor users are able to change their own passwords. Each user is also responsible for controlling access to his or her calendar in the Activity Manager.

For information on setting your password, see: Setting a Password

For information on controlling access to your calendar, see: Controlling Others' Access to Your Calendar

If you are a supervisor user and want to access on-line help relating to installation-wide security, select **Security** from the **Options** menu, then press F1 at the security screens.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TM_Program_Features_Setup)<<1} Program Features Setup

# Setting a Password

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

## To Add or Change Your Login Password:

1. From the **Options** menu, select **Change Password**. A Password dialog box will appear asking for your current password.
2. Type your current password in the `Enter Current Password:` field.
3. Type the new password in the `Enter New Password:` field.
4. Type the password again to verify it in the `Verify New Password:` field.
5. Click **OK** to save your new password.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND3_Controlling_Others_Access_to_Your_Calendar)<<1} Activity Manager Security

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Basics_of_Using_TeleMagic_Enterprise)<<1} Basics of Using TeleMagic Enterprise

# Saving Settings and Exiting TeleMagic

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

Before you exit TeleMagic, you may want to save your current settings. Save Settings allows you to automatically use the current settings the next time you use TeleMagic. When you activate the Save Settings feature, TeleMagic records the following every time you close the program:

- Which database (if any) was last open

- Which page of which level you were last viewing; or, if you were not using the Contact Manager, which view of your Activity Manager was open.

- Which filter and index were last active

Saving settings will save you time from searching to find your previous place the next time you open the program.

Saved Settings overrides any other preferences you may have set to control what happens when you open TeleMagic. Specifically, it will override the `Controlling Level` option on the Database preferences screen and your `Startup Database` in Contact preferences. (For more on these preferences, see the Controlling Level and Startup Database topics.)

## To Save Settings for the Current Session:

1. At any point during your TeleMagic session, select **Save Settings on Exit** from the **Options** menu.

   A check mark shows that the option is activated. When you close the program, it will save your settings.

2. Close TeleMagic using one of the following methods:

   To Exit TeleMagic from the Main Menu:

   To Exit TeleMagic Using the Toolbar:

   To Exit TeleMagic Using the Keyboard

- Save Settings on Exit will remain activated, saving different settings every time you exit TeleMagic, until you uncheck the option.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Starting_The_Program_and_Logging_In)<<1} Starting The Program and Logging In

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Using_Menus)<<1} Using Menus

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½MASTER_Using_the_Toolbar)<<1} Using the Toolbar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Working_with_the_TeleMagic_Window)<<1} Working with the TeleMagic Window
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½MASTER_Handling_Error_and_Warning_Messages)<<1} Handling Error and Warning Messages

## To Exit TeleMagic from the Main Menu:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

- From the **File** menu, select **Exit**.

## To Exit TeleMagic Using the Toolbar:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

- Click on the **Exit** button.

## To Exit TeleMagic Using the Keyboard

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Basics of Using TeleMagic Enterpriseï¿½ ï¿½ ï¿½ )<<1}

- Press ALT+F4.

# Exit TeleMagic

Click this button to close TeleMagic.

## Month at a Time

Open the Activity Manager in Month at a Time view. Click here to learn more about Month at a Time view.

## View Assigned Activities

View a list of all activities that you have assigned to others or that have been assigned to you by others. Click here for more on activity assignment. Click here for more about viewing assigned activities.

## Pending Activities

Access the Pending Activities List where you can view, edit, call on, or complete your activities. Click here for more information on the Pending Activities List.

## Contact Browse

View a tabular list of all the records in the filter in use on the current level. Click here for more on contact browse.

## Word Processing Tool

Access the Word Processing Document selection box for the default word processor to which you are linked in Writing preferences. Click here for more on the Word Processing link. Click here for more on the Document selection box. Click here for more on setting up a default word processor.

# Fax

Access the Send Fax dialog box where you can use TeleMagic's integrated fax feature. Click here for more on faxing from TeleMagic.

## Wireless Messaging

Access the Wireless Messaging dialog box where you can send a message to a TeleMagic user, the current contact, or another number of your choice. Click here for more on wireless messaging from TeleMagic.

## E-mail

Access TeleMagic’s integrated e-mail system. More on e-mail in TeleMagic .

## Spell Check

Spell check the currently selected text region. Click here for more on using the spell checker in TeleMagic.

## Branch Scripting

Access TeleMagic's Branch Scripting feature. Click here for more information on Branch Scripting.

## Sales Forecasting

Access TeleMagic's Sales Forecasting feature. Click here for more on Sales Forecasting.

## Recall

Schedule a call to the current contact in the Activity Manager. Click here for more on recalls.

## Answer the Phone

Use TeleMagic's call tracking system for an incoming call. Click here for more on answering the phone.

## On-Line Help

Access context-sensitive on-line help.

## Note

This section assumes that the system administrator has already opened TeleMagic, performed registration, and added all necessary users to the system.

## Note for Step 2

The Login dialog box should display fields for the `User ID` and `Password`. If a `User Name` field appears, this installation of TeleMagic has not been set up. Unless you are the system administrator, click **Cancel** to exit this dialog box and contact your system administrator. If you are the system administrator, refer to your *System Administrator & Installation Guide* for instructions on first time setup.

## Note for Step 3

Your User ID and password were assigned during TeleMagic installation. If you do not know your User ID, contact your system administrator.

## Note for Step 5

If you have typed your password incorrectly, you will have two more tries. After the third incorrect attempt, the program will close.

## Note for Step 6

Most of the examples in this help file are based on the Documentation database. If you will be following the examples, we recommend using the Documentation database to explore TeleMagic.

## Hint for Menu Options

Some menu options have a CTRL key or function key option listed next to the menu item. These are shortcuts that allow you to choose a menu option without displaying the menu.

## Note for Step 5

It is also possible to change your password through the User preference screen. See the Change Password topic.

## Note for Step 2

If you uncheck the option, your preferences will be used the next time you start TeleMagic.

# New Features in the Contact Manager

# New Features in the Activity Manager

The Activity Manager has been completely redesigned for V4. All major features have been retained, and most have been improved. New design features have been implemented to simplify scheduling tasks for all users.

Activity Manager Interface

Activity and To-Do Dialog Boxes

Availability Checking

Deleting and Editing Activities from Time Slots with Multiple Activities

Hide Activities

Month View

Toolbars

Undo

## New Word Processing Features

## New Features in E-mail

E-mail has been completely redesigned for V4. TeleMagic E-mail has been replaced with TeleMagic Internet Mail. Due to this radical change, even features that did exist in TeleMagic E-mail have been dramatically enhanced.

Addressing Messages
Attachments
Automatic Spell Check
E-mail Key Field
E-mail Status
Encrypted Storage
Include Original Message in Reply
Independant Operation
Link Incoming Mail
Linking Messages to Contacts
Mail Folders
MAPI Support
Multiple Accounts
Password Protection
Paste Contact Information
Receiving Messages
Select Recipients
Stamping the Notepad
Support for Data Synchronization Server
Support for Standard Mail Protocols

Use the following jumps to access more detailed information on the topics indicated.

E-mail Preferences
New Message Options

## New Reporting Features

Custom Reports
User List

# New Features in Branch Scripting

Branch Scripting has been significantly changed for V4. The new interface is designed to make script design and implementation easier for all users who deal with scripts.

RTF Controls

User Interface

## New Features in Preferences

Century Rollover
E-mail Address
Preferences Dialog Box
Toolbar Configuration
User Setup

## New Screen Designer Features

## New Functions

DTSTAMP()
GETDISTANCE()
GETZIPCODE()
GETZIPINFO()
HASACTIVITY()
HASEVENT()
NPDMERGE()
TXTMERGE()
VERIFYZIPINFO()

## Miscellaneous New Features

## Data Synchronization Server

# Automation Server

## Add / Edit Fields

Template Lengths
New Field Types

## New Import Features

The Import function has been significantly changed for V4. Most apparent is the new wizard format, designed to simplify the process of importing data to your TeleMagic databases.

Duplicate Records
Express Import Format
Field Assignment
Field Calculations
Field Rules
Import Progress Indicator
Notepad Stamp
SDF File Parser
Single-User and Multi-User Modes
Supported Import Formats
Updating Indexes
Validation of Incoming Data
Wizard Interface

# Sales Forecasting

## 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.

## New Message Options

Four options are available when a new message is created:

Queue to Automation Server

Queue Message Locally

Send Immediately

Place On Hold

## 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

E-mail Preferences are now separate from TeleMagic Preferences. The Preferences dialog box for TeleMagic Internet Mail is divided into nine pages:

General
Display
Servers
Delivery
Spelling
TeleMagic
Automation Server
Filters
Addresses

## 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 section 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 rollup 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.

## Send Fax Dialog Box

The Send Fax dialog box has been redesigned. All options are divided among five pages:

Fax
Docs
Options
External Docs
Comments

# 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.

## Single-user and Multi-user Modes

There are now two import modes available: Single-user and Multi-user. The Single-user mode is faster and allows more options, but requires that all users be out of TeleMagic. Multi-user does not require exclusive use of TeleMagic.

## 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 (20*xx*). 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.

## Dockable Control Bar

The 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.

## 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.

## 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.

## Optimizing the Outbound Call Center

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Call Centerï¿½ ï¿½ ï¿½ )<<1}

If you need to make multiple calls in a single session, (for telemarketing, surveys, sales contacts, or collections), TeleMagic makes it easy to optimize your outbound calling.

You can allow multiple users access to the same filter—create a single filter for all users, or create multiple filters and assign a group of users to each filter. While on the phone with a contact, each user can use Call Notes to keep detailed notes regarding their call. Upon completion of a call, The Zoom Dial feature automatically advances to the next record in the selected filter—this allows users to focus on their calls while TeleMagic locates all the records.

There are two different approaches you may take when placing a series of calls: you may either create activities for each contact who needs a call, or you may use Zoom Dial to move through your database calling each contact in a filter. With either approach, TeleMagic allows you to quickly zoom through your list of phone calls for maximum productivity.

Creating activities in the Activity Manager gives you the advantage of assigning one TeleMagic user the responsiblility of following up on the call. This is particularly useful if you are placing follow-up calls on sales leads, accounts payable, or any other mass calling situation where you have established a relationship with the contact. There is also a scrollable notepad that allows you to keep notes on the activity—notes recorded in this notepad can be used by a user to recall a conversation with a contact.

Contact based calls use the Recall field to schedule a call date and time. This is useful if the contact needs to receive a call, but it does not matter who places the call. Rather than creating an activity that must be assigned to someone, you can create a Recall field to record the information that a call is necessary on the given date and time. Contact based recalls are ideal for telemarketing, surveys, or any other cold-calling situation.

If you have received a phone list that needs to be imported into your database, see the Importing Records From Another Program topic for more information. Ensure that records are properly imported before continuing.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½OOCC_Scheduling_Multiple_Calls_in_the_Activity_Manager)<<1} Scheduling Multiple Calls in the Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½OOCC_Scheduling_Multiple_Calls_on_the_Contact_Record)<<1} Scheduling Multiple Calls on the Contact Record

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½OOCC_Calling_on_a_Series_of_Activities)<<1} Calling on a Series of Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½OOCC_Calling_a_Group_of_Contacts)<<1} Calling a Group of Contacts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½OOCC_Examples)<<1} Examples

# Examples

Listed below are 4 real world situations and solutions showing how you can use TeleMagic features to optimize your sales process.

**Situation 1:** You are the manager of a sales team. You have recently received a file with leads from a trade show and want to incorporate the leads into TeleMagic, then divide them among your 5 sales people. You would like to keep track of each representative's productivity and generate a statistical rating of your top producers.

**Solution:**

**1)** Import the list of leads into TeleMagic using the Import feature. See Importing Records From Another Program

**2)** Create activity based multiple recalls and divide the database evenly to all of your sales people. See Scheduling Multiple Calls in the Activity Manager

**3)** Use the Pending Activity List to go through the list of phone call activities in chronological order. See Calling on a Series of Activities

**4)** Instruct your sales people to use the Sales Forecasting feature to track potential and closed sales from the assigned activities. Use the Sales Forecasting Reports feature to track each representative's productivity. See Forecasting Sales

**Situation 2:** You are in charge of overdue accounts for a collection service. You need to call on accounts that are more than two weeks late on a payment. Your goal is to receive a promise to pay, or to inform the contact that their account will be remanded to the legal department.

**Solution:**

**1)** Make sure there are fields in your database to track payment due date and last payment date. Assuming payment is due on a monthly basis, create a filter on records having a date in the last payment date field that is more than 6 weeks earlier than the payment due date. Create an ascending index on the due date. See Creating and Defining Fields and Creating Filters

**2)** Create contact based recalls for every contact in the filter. See Scheduling Multiple Calls on the Contact Record

**3)** Use Zoom Dial to call each record in the filter in the due date index order. (This will allow you to call the contacts with the oldest outstanding balances first.) See Calling a Group of Contacts

**Situation 3:** You supervise an outbound call center. You regularly receive mailing lists with phone numbers for specific regions. You want to assign a region to each of your Telemarketers; you also want to track who is meeting the goal of 50 phone calls a day, and who is falling below.

**Solution:**

**1)** Create a script that can be used by your Telemarketers to standardize the image of your company that is presented to the public by your staff. See Script Setup

**2)** Add a Last Call field to your database. See Last Call Field (LCL)

**3)** Create a filter for each region. Create another filter for empty Last Call fields. Creating Filters

**4)** Create contact based recalls for each region. Select to only schedule the first 50 recalls and clear the RCL field. See Scheduling Multiple Calls on Contact Records

**5)** Assign a filter to each telemarketer and have them complete the calls using Zoom Dial and the script. See Calling a Group of Contacts

**6)** Create a report using the empty Last Call field filter that groups records by region and calculates how many records in each region are not completed each day. See Producing Custom Reports and Labels

**Situation 4:** You have a series of pending sales that you are tracking. You want to be able to work with only the records that need to be contacted each day, and easily access the list of due activities.

**Solution:**

**1)** Add Sales Forecasting records for each pending sale. See Forecasting Sales

**2)** Create an activity rollup list that filters on activities due today. See Activity Rollup

**3)** As you complete the day's activities from the rollup list, update the Sales Progress in the related Sales Forecast record. See Recording Sales Progress

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½OOCC_Optimizing_the_Outbound_Call_Center)<<1}

# Scheduling Multiple Calls in the Activity Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activity Managerï¿½ ï¿½ ï¿½ )<<1}

This feature allows you to create an activity for every contact in a filter. You can assign the activities to yourself, or divide them between other users.

## To Schedule Multiple Activity Based Calls:

1. Create a filter to isolate the records for which you would like to create the recalls. (See the Creating Filters topic for more information.)

2. From the **Activity** menu, select **Set Multiple Recalls (Activities)**.

3. If you do not have an RCL field in your database, the Set Multiple Activities dialog box will open. Skip to step 5.

**or** If you have an RCL field in your database, the Activity/Recall Type dialog box will open.

4. Select the `Create activities (recalls) in the Activity Manager` radio button.

   The Set Multiple Activities dialog box will open.

5. Select a filter in the `Use this Filter` field. An activity will be created for every contact in that filter.

6. Select an index in the `Use this Index` field. The first activity will be linked to the first contact in the index, and so on.

7. Enter the date on which you would like the first call scheduled in the `Start Date` field.

8. Enter how far apart you would like the activities scheduled in the `Schedule every` field. (Think about how long it will take you to finish one call when deciding how far apart to make the activities. Allow enough time between activities to record call notes and update the contact's record, if necessary.)

9. In the `Time Range` area, enter the start and end time of your work day. Activities will be scheduled within that range.

10. If you would like to set aside a block of time during the day when activities are not scheduled, such as during your lunch hour, mark the `Exclude this Time Block` check box and enter the start and end times in the `From` and `To` fields.

    A call will be scheduled for the first contact in the filter on the start date and time. Subsequent calls will be scheduled for each contact in the filter, spaced apart according to the `Schedule every` setting. Calls will be scheduled up until the `End Time` on the first day, then will recommence on the `Start Time` the following day. This will continue until all of the necessary activities have been scheduled.

**Example:** If you enter 9/20/2099 as the `Start Date`, 10 minutes in `Schedule every`, and a `Time Range` between 8:00 and 5:00, the activity linked to the first record in the filter will be on 9/20/2099 at 8:00 a.m. The next activity will be scheduled on 9/20/2099 at 8:10 a.m., and so on (excluding the times between the `End Time` and the `Start Time` and the times specified under `Exclude this Time Block`).

11. If you are scheduling the calls for yourself, and want one scheduled for every contact in the filter, skip to step 22.

**or** If you would like to assign the calls to one or more other users and/or you would like to limit the number of calls that are scheduled, click **Setup Options**.

The Users and Scheduling Options dialog box will open.

The `Available Users` list will include all users who have granted you full access to their activity schedule. The `Create Activities for` list will default to your user name.

12. If you do not want to schedule calls for yourself, highlight your name in the `Create Activities for` list and click **Remove**.

13. Highlight each user for whom you want to create calls and click **Add**. The user will move to the `Create Activities for` list.

• 14. If you want to only schedule calls for a given number of contacts in the filter, select the `Distribute Fixed Number` radio button and enter the number of calls you would like to create for each user.

**or** If you want to schedule calls for every contact in the filter, select `Divide Total Evenly`. If you are scheduling calls for a single user, that user will receive a call for every contact in the filter. If you are scheduling for multiple users, the calls will be divided evenly between the users.

• 15. If you would like all the selected users to receive an e-mail notification informing them of the assigned activities, select the `Send E-Mail to all users` check box.

16. Click **Analyze** to view a summary of your selections.

The Preview of Distribution of Assigned Activities dialog box will open.

This dialog will list the users who have been selected to receive calls. It will also give information analyzing how your distribution selections will affect your selected filter. If you have selected to distribute a fixed number of calls, you will be shown of the total number of records in the filter, and the number of records that will be left after the selected users receives their allotments. If you have selected to divide the total evenly, you will be given the list of selected users and how many activities each will receive.

17. If you would like to print this list, mark the `Print` check box.

18. Click **OK** to close the Preview Distribution of Activities dialog box. If you selected to print the list, it will be sent to the printer.

    You will return to the Users and Scheduling Options dialog box.

19. Make any necessary adjustments to your selections based on the analysis and click **OK**.

    You will return to the Set Multiple Activities dialog box.

20. Enter the type of activity in the `Activity Type:` field, or select the type from the list box.

21. Enter the priority of the activity in the `Activity Priority:` field.

22. If you would like the selected users to receive an alarm for each call, mark the `Alarm` check box and enter how soon before the activity time the alarm should go off.

    A field named LCL can be created to keep track of the last time a call is placed to a contact through the TeleMagic Dialer. If you have an LCL field in your database, you have the option of emptying the LCL field prior to scheduling the multiple calls. By starting with all records in the filter containing no data in the LCL field, as calls are placed you can create a filter to determine which contacts have not yet received a call. This is particularly useful if you are distributing a fixed number of activities and will need to later isolate the contacts who did not receive an activity. (See the Last Call Field (LCL) topic for information on creating this field if it does not exist.)

23. If you would like to delete the current contents of the LCL field for all contacts in the selected filter, mark `Clear LCL Field`.

24. If you do not want to schedule a call for contacts who have a recent pending call, mark `Skip contacts`

`with pending activities after` and enter a date in the date field.

**or** If you would like to schedule an activity for these contacts even if they have an existing pending call, leave this check box unmarked.

25. If you would like activity information entered in the contacts' notepad, mark the `Stamp contacts' notepads with activity information` check box.

26. When you are satisfied with your selections, click **Schedule**.

    The calls will be scheduled. A status bar will appear letting you know the progress.

    When it is complete, a Distribution of Assigned Activities dialog box will appear.

27. If you would like a printout of this information, mark `Print` and click **OK**. The information will be sent to your printer and this dialog will close.

**or** If you do not want a printout of this information, leave **Print** unmarked and click **OK** to close this dialog.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½OOCC_Calling_on_a_Series_of_Activities)<<1}

# Scheduling Multiple Calls on the Contact Record

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Recallsï¿½ ï¿½ ï¿½ )<<1}

This feature allows you to automatically set a call date and time in the RCL field for every contact in a filter.

## To Schedule Multiple Contact-Based Recalls:

1. Make sure you have a field named RCL in your database. (See the Recall Field (RCL) topic for information on creating this field.)

2. From the **Activity** menu, select **Set Multiple Recalls (Activities)**.

   The Activity/Recall Type dialog box will open.

3. Select the `Create recalls using the recall field (RCL) on this level` radio button.

   The Set Multiple Recalls dialog box will open.

4. Under `Use this Filter`, select the filter containing the records for which you would like to set a recall.

5. Under `Use this Index`, select an index. The recalls will be scheduled in index order.

6. Enter the date on which you would like the first recall scheduled in the `Start Date` field.

7. Enter how far apart you would like the recalls scheduled in the `Schedule every` field. (This will default to your `Default activity duration` Activity preference.)

8. In the `Time Range` area, enter the start and end time of your work day. Recalls will be scheduled within that range.

9. If you would like to set aside a block of time during the day when recalls are not scheduled, such as during your lunch hour, mark the `Exclude this Time Block` check box and enter the times in the `From` and `To` fields.

   **Example:** If you enter 9/20/2099 as the `Start Date`, 10 minutes in `Schedule every`, and a `Time Range` between 8:00 a.m. and 5:00 p.m., the RCL field for the first record in the filter will be filled in with 9/20/2099 8:00. The RCL field in the next record will be filled in with 9/20/2099 8:10, the next with 9/20/2099 8:20, and so on (excluding the times between the `End Time` and the `Start Time` and the times specified under `Exclude this Time Block`).

10. Under `Schedule for`, select `All Records` if you

would like to set a recall for every record in the filter.

**or** If you would like to limit the number of recalls that are scheduled, select `First` and use the spinner arrows to enter the number of records. The RCL field will be filled in for the specified number of records in the filter. (Once the recalls have been completed, you can modify your filter to exclude the records that have already received a recall and schedule for the remaining records, if desired.)

A field named LCL can be created to keep track of the last time a call is placed to a contact through the TeleMagic Dialer. If you have an LCL field in your database, you have the option of emptying the LCL field prior to scheduling the recalls. By starting with all records in the filter containing no data in the LCL field, as calls are placed you can create a filter to determine which contacts have not yet received a call. This is particularly useful if you selected to only schedule recalls for a specific number of records in the filter. (See the Last Call Field (LCL) topic for information on creating this field if it does not exist.)

11. If you would like to delete the current contents of the LCL field for all contacts in the selected filter, mark `Clear LCL Field`.

12. If you do not want to schedule an activity for contacts who have a recent or upcoming recall scheduled, mark `Skip contacts with recalls after` check box and enter a date in the date field.

**or** If you would like to overwrite the contents of the RCL fields, leave this check box unmarked.

13. Click **Schedule**.

TeleMagic will begin to schedule the activities. A status bar will inform you of the progress.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½OOCC_Calling_a_Group_of_Contacts)<<1}

# Calling on a Series of Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½ )<<1}

You are able to access a list of your pending activities in the Contact Manager. If you have a group of call type activities, you can use this list to zoom through your calls very quickly. Simply dial the first contact and complete the call. You will be returned to the Pending Activity List where you can select the next call, and so on down the list.

## To Place a Series of Calls from the Pending Activity List:

1. From the toolbar, select the Pending Activities tool.

**or** Click the Goto button ( ● ) on the Contact Manager Toolbar, then click the **Pending Activities** button.

The Pending Activity List will open.

2. Highlight the first activity on which you would like to call.

●

If the activity is linked to a contact record, that contact's three phone number key fields will appear at the top of this dialog box. The field prompt will be listed, followed by a phone icon and the number.

●

3. Select the phone number you would like to dial and click the phone icon.

**or** On the keyboard, press the number preceding the phone number's prompt.

The call will be dialed and the Call Notes dialog box will appear.

4. Complete the call following the instructions under Dialing Outgoing Calls.

●

When you complete the call, you will be returned to the Pending Activity List dialog box.

5. Select the next call on the list and repeat steps 2 through 4.

**or** Click **Close** to exit the Pending Activity List.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½OOCC_Examples)<<1}

# Calling a Group of Contacts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Activitiesï¿½ ï¿½ ï¿½ )<<1}

If you are conducting telemarketing sales, phone surveys, or other tasks which require high-volume dialing, you will find the Zoom Dial feature invaluable. Zoom Dial is a rapid re-dial feature designed for outbound call centers. When a call is completed with Zoom Dial active, TeleMagic will immediately go to the next contact in your index and open a Dialer selection box so that you can quickly dial your next contact. (If you have dialed from a phone icon on the Contact Manager page, that same number will be automatically dialed, bypassing the Dialer Selection box.) The Zoom Dial option can be accessed in Dialer preferences (from the **Options** menu, select **Preferences**, then click the **Dialer** tab). Once you have activated Zoom Dial, you can begin to call your contacts.

## To Place Calls from the Contact Manager:

1. If you have scheduled a series of recalls using the Multiple Contact-Based Recall feature (See Scheduling Multiple Calls on the Contact Record for details), create and select an index on the date in the Recall field. (This will allow you to call the contacts in the order of the scheduled recalls.)

2. With Zoom Dial turned on (see the paragraph at the start of this topic), click **Dial** on the toolbar. Select the desired number from the Dialer selection box and click **Dial**.

**or** Click the phone icon next to the contact's phone field that you would like to dial. (This will allow you to dial the desired number directly, bypassing the Dialer selection box. The number contained in this phone field will be dialed for each contact.)

The Call Notes dialog box will appear.

3. If you would like to use a script with this call, click the Branch Scripting toolbar icon. Follow the instructions in To Make a Call Using a Script: for help on using the script.

4. Complete the call following the instructions in the Dialing Outgoing Calls topic.

When you complete the call, the Contact Manager will open and move to the next record in the filter. If you have placed the call using the **Dial** button, the Dialer selection box will appear. If you have placed the call using a phone icon, the Call Notes dialog box will appear.

5. Repeat steps 2 through 4 for each contact you would like to call.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½OOCC_Examples)<<1}

## Note for Step 14

If you select this option, make sure you have some way of keeping track of which contacts have received calls. Once the first set of calls has been completed, you can modify your filter to exclude these contacts and create calls for the next group of records.

## Note for Step 15

To avoid forcing users to manually accept each of the assigned activities, the Accept/Reject Activity Assignment dialog box will not appear. If you want to alert users of the assigned activities, mark this check box.

## Note for Step 22

This will set an alarm for *every* activity. As a general rule, you should not set an alarm for multiple activities.

## Note for Step 23

If this check box is unavailable, make sure that you have a field named LCL in the database and that you are scheduling a Call type activity.

## Note for Step 11

If this check box is unavailable, check to make sure that you have a field named LCL in the database and that you have security rights to the field.

## Note for Step 2

If the activity is not linked, or if it is linked to a contact in another database, you will be informed of these facts.

## Note for Step 4

If you are placing a series of calls, avoid toggling to the contact record. If you access the Contact Manger during the call, when it is complete, you will be returned to the Contact Manager instead of the Pending Activity List. You will have to open the Pending Activity List again to make the next call.

## What are Preferences?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Preferences are user-defined configuration options. They are part of what makes TeleMagic so flexible; you can use them to tailor the program to fit not only the needs of your company, but also the needs of each individual user. Using Preferences, you can perform such basic functions as adding and deleting users, or such specialized functions as specifying which days you want to include in your weekend.

Preferences can be *user*-specific, *database*-specific, or *installation*-specific. Toolbar and function key configuration options can belong to any of the three groups, depending on your Directories preference choices.

- User specific preferences apply to the current user, and consist of Activity, Contact, Dialer, Directories, Display, E-mail, Fax, Wireless Messaging, and Writing configuration options.

- Database preferences include the configuration options for the current database and key fields for the current database.

- Global preferences apply to the whole installation, and include the options available from the System and User pages. Installation preferences are only available to supervisor users.

## User, Database, and Installation Preferences

# User Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

*User preferences* establish how your screens will look and feel, and where TeleMagic will store files related to your databases. Options selected for user preferences will affect *all* databases for the current user. These preferences will be affected any time anyone logs into TeleMagic with your User ID, regardless of which workstation is being used.

User preferences include:

Activity Preferences
Contact Preferences
Dialer Preferences
Directory Preferences
Display Preferences
Fax Preferences
Wireless Messaging Preferences
Writing Preferences

The location of Function Key and Toolbar preferences is dependent upon your Directory preferences. Although these options are located by default in Global Preferences, they may appear on the User or Database list.

Additionally, for non-supervisor users, User Preferences (User Setup) will be included in the User preferences list. (Non-supervisor users may alter their own user settings. Supervisor users may use this preference screen to add and edit users for the entire installation. This option will be found under Global Preferences for Supervisor users.

# Database Specific Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

You can use *database specific preferences* to establish key fields, name database levels, and establish certain display defaults for that database.

Database specific preferences must be established for each database. You must open each database in turn to establish its preferences. Options selected for database preferences affect the database currently open, no matter who logs in as a user. Before changing database specific preferences, be sure that the database you have open is the one you want to change.

The location of Function Key and Toolbar preferences is dependent upon your Directory preferences. Although these options are located in Global Preferences by default, they may appear on the User or Database list. (See Directory Preferences for details.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Database_Preferences)<<1} Database Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Preferences)<<1} User Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Installation_Preferences)<<1} Global Preferences

# Global Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

*Global preferences* are used to specify authorized users, system and user IDs, user passwords, and the date formats in use in the installation. Installation preferences are only available to those users with supervisor security access to TeleMagic, and are normally set and controlled by the system administrator. The location of Function Key and Toolbar preferences depends on your Directory preferences. Although they are located in Installation preferences by default, they may appear on the User or Database list. (See Directory Preferences for details.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_System_Preferences)<<1} System Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Function_Key_Setup)<<1} Function Key Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Toolbar_Configuration)<<1} Toolbar Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Preferences)<<1} User Preferences (User Setup)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Preferences)<<1} Database Preferences

# Preferences and Security

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

While some preference sets can be manipulated freely without compromising system security, others should be modifiable only by users with high security access; others should be altered only by the system administrator.

There are three levels of security on preferences:

In TeleMagic security, you have the option of allowing a security group access to preferences. Granting this access allows users to edit their user-specific preferences. (See User Preferences for the list of the preferences available with this basic security access.) If you are unable to access Preferences, you have not been granted the security rights to do so.

If a group has access to user-specific preferences, you then have the option of allowing members access to database preferences. If you have a database open, but do not see the Database or Key Field options on the list of preferences available, you have not been granted security rights to edit Database preferences for the current database. (This security is database-specific. You may be able to edit database-related preferences for some databases, but not others.)

System and User preferences are restricted to supervisor users only. (Non-supervisor users will see User preferences on the user specific list of preferences. When accessed from the user specific area, User preferences will only contain information on the user's own setup. Other users will not be visible.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Database_and_Installation_Preferences)<<1} User, Database, and Installation Preferences

# Setting Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

## To Set or Change Preferences:

1. From the **Options** menu, select **Preferences**. If the **Preferences** option is dimmed on your **Options** menu, you may not have the security clearance to set preferences. Contact your system administrator.

   The Preferences dialog box will open, defaulting to the Activity preference set.

2. Click on the tab corresponding to the desired preference set, or use the arrow keys to access the preference set.

3. Customize preferences using the guidelines in the following sections:

   For more on Activity preferences, see Activity Preferences

   For more on Contact preferences, see Contact Preferences

   For more on Database preferences, see Database Preferences

   For more on Dialer preferences, see Dialer Preferences

   For more on Directory preferences, see Directory Preferences

   For more on Display preferences, see Display Preferences

   For more on E-mail preferences, see E-mail Setup

   For more on Fax preferences, see Fax Preferences

   For more on Wireless Messaging preferences, see Wireless Messaging Preferences

   For more on Key Field preferences, see Key Field Preferences

   For more on Function Key preferences, see Function Key Setup

   For more on System preferences, see System Preferences

   For more on Toolbar preferences, see Toolbar Preferences

   For more on Writing preferences, see Writing Preferences

For more on User setup, see User Preferences (User Setup)

4. When you have finished editing the selected preference set, click on another topic tab.

5. Select **Yes** to save your edits to the current preference set and move to the selected preference set.

**or** Select **No** to move to the selected preference set without saving your changes to the current preferences.

6. When finished with the Preferences screen, click **OK** to save the changes to the current preference set and exit the screen.

**or** Click **Cancel** to cancel the changes to the current preference set and exit the dialog box.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Preferences_and_Security)<<1} Preferences and Security
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Database_and_Installation_Preferences)<<1} User, Database, and Installation Preferences

# Activity Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Activity preferences are user preferences that allow you to establish defaults for the use of the Activity Manager. You can control many options: the maximum number of activities that may be scheduled in a day, how often, for how long, and on which days; the location of your activity files; defaults when linking activities to contacts; and whether users must have scheduling rights to your calendar to include you in a group activity.

When you try to schedule an activity that conflicts with these settings, a dialog box will appear to warn you of the conflict. This helps you avoid over-booking, missing appointments, or accidentally scheduling a meeting on a weekend. In most cases, you can ignore and override these warnings if you want.

## To Set Activity Preferences

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open, defaulting to the **Activity** tab.

2. Customize these preferences using the guidelines below.

   Days in Weekend
   Location of Activity Files
   Default Description to Record Descriptor when Linking
   Link to Current Contact by Default
   Allow All Users Group Scheduling Rights to Your Calendar
   Show Time in Blocks Of
   Default Activity Duration
   Maximum Activities Per Day
   Minimum Time Gap Between Activities
   New Alarm/Snooze Interval

# Activity Preferences: Days in Weekend

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Activity Preferences screen.

If you try to schedule a call, meeting, or other activity on a day checked under `Days in Weekend`, a pop-up dialog box will notify you that you are trying to schedule an activity on a non-working day. The default weekend days are Saturday and Sunday. If your business closes routinely on different days, mark or unmark the appropriate boxes.

This preference only applies to activities scheduled in the Activity Manager, not to recalls scheduled from the Contact Manager.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Location_of_Activity_Files)<<1} Location of Activity Files

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Activity Preferences: Location of Activity Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Activity_Preferences_Location_of_Activity_Files_Notes)<<1}

This option is accessed from the Activity Preferences screen.

When you schedule activities, TeleMagic stores the information in a file named ACTIVITY.DBF, which is stored by default in the global TeleMagic directory. This file contains activity information for all users; because all users' activity information is stored in the same file, users are able to assign activities to others and to view other users' schedules.

You may want to store your activity information in a separate ACTIVITY.DBF file. Rather than sharing the activity file with all other users, this allows you to keep your activities separate, or to share only with specific users who are accessing the file from a shared location. For example, all users in your department may choose to store their activities in a shared location. Using the Location of Activity Files feature, you can specify where you want your activities stored and TeleMagic will create an ACTIVITY.DBF file in that path.

When you access the Activity Manager with your activities stored in a location other than the default, TeleMagic will open the activity file stored in the specified location instead of the one stored in the TeleMagic common directory (\TM4\COMMON by default). Any activities you create for yourself or other users will be written to that activity file.

Be aware that if you have granted permission to schedule activities on your calendar to users who store their activities in the global path, those activities will be written to the ACTIVITY.DBF file stored in the global directory (the directory where TeleMagic is installed). You will not see these activities on your calendar or receive notification of these activities as long as you continue to store your activities outside of the global path. Similarly, if you assign activities to any other users, they will be written to the activity file that you are using, and not to the global activity file that is probably in use by the user to whom you are assigning the activity. This also applies to any group activities that you create or that are assigned to you. If you want to share activities with other users, you must either leave your activities in the global path, or the other users must also have set their location of activity files to the same path as you.

### To Change the Storage Location for your Activities Files:

1. At the Activity Preferences screen, manually edit the path in the `Location of Activity Files` field.

**or** Click **Location of Activity Files**.

A Select Directory dialog box will open.

2. If necessary, use the `Drive:` list to select a new drive.
3. Select the new storage directory from the scroll box.
4. Click **Select**.

The Select Directory dialog box will close. The new path will appear in the `Location of Activity Files` field.

5. On the Activity Preferences screen, click **OK**.

   If you do not have existing activity files in the new directory, a message will appear asking if you want to create the files.

6. Choose **OK** to create new (blank) activity files.

   If you have activities existing in the activity file currently in use (that is, if you have existing items on your activity calendar), a message will appear asking if you want to transfer your activities to the new directory.

7. If you do want to move your activities to the new directory, choose **Yes**. If you choose **No**, your old activities will remain visible to other users to whom you have granted viewing permission, and will be accessible to you if you ever change the location of your activity files back to the previous path.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Default_Description_to_Record_Descriptor_when_Linking)<<1} Default Description to Record Descriptor when Linking

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Activity Preferences: Default Description to Record Descriptor when Linking

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Activity_Preferences_Default_Description_to_Record_Descriptor_when_Linking_Notes)<<1}

This option is accessed from the Activity Preferences screen.

When you link an activity to a contact record, you have the option of having the activity's `Description` field automatically fill in with the identifying descriptor for that record (defined in Key Fields). Mark `Default Description to Record Descriptor when linking` if you want the `Description` field to be filled in automatically with the descriptor. With this option marked, as soon as you link a record or change a record's link, the `Description` field will be filled in with the record descriptor for the linked record. You can edit the descriptor as necessary once the link is made.

Leave the box unchecked if you do not want the description filled in automatically.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Link_to_Current_Contact_by_Default)<<1} Link to Current Contact by Default

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Activity Preferences: Link to Current Contact by Default

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Activity Preferences screen.

This option allows you to have all new activities linked to the contact currently open in the Contact Manager by default. You will retain the ability to change the link as necessary. If the majority of the activities you create need to be linked to the current contact, mark this check box. Leave the box unchecked if you would rather have new activities go to default values, with no contact link.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Allow_All_Users_Group_Scheduling_Rights_to_Your_Calendar)<<1} Allow All Users Group Scheduling Rights to Your Calendar

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Activity Preferences: Allow All Users Group Scheduling Rights to Your Calendar

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Activity Preferences screen.

Control of access to your calendar is maintained in User Permissions, accessed from the **Activity** menu. (See Controlling Others Access to Your Calendar for details.) Options available in User Permissions include granting rights to view your calendar and/or schedule and edit your activities. It is possible that you may not want to grant users this level of access to your calendar, but you may still want to be included in any necessary group activities.

The `Allow all users Group Scheduling rights to your calendar` option enables you to allow all users the right to include you in group activities, without forcing you to set up permissions for each user individually. Any permissions you do grant to individual users will be in addition to this preference. If this box is unchecked, only users to whom you have granted full access will be able to include you in group activities.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Show_Time_in_Blocks_Of)<<1} Show Time in Blocks Of

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Activity Preferences: Show Time in Blocks Of

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Activity Preferences screen.

The Day at a Time and Week at a Time view calendar pages show each day divided into time slots for viewing activities. You can control the length of time represented by each time slot. The default time block is every 30 minutes, but you can change the interval to every 5, 10, 15, or 60 minutes.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Default_Activity_Duration)<<1} Default Activity Duration

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Activity Preferences: Default Activity Duration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Activity_Preferences_Default_Activity_Duration _Notes)<<1}

This option is accessed from the Activity Preferences screen.

When you create an activity, you establish how long you think the activity will last. Use the `Default activity duration` setting to provide a default activity length. The time block entered in this field will be offered in the `Duration` field for new activities. (It can be edited for individual activities if necessary.)

This preference only applies to activities scheduled in the Activity Manager, not to recalls scheduled from the Contact Manager.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Maximum_Activities_Per_Day)<<1} Maximum Activities Per Day

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Activity Preferences: Maximum Activities Per Day

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Activity Preferences screen.

If you want to prevent overbooking your appointment schedule, use the spinner arrows to set (or type in) a maximum number of scheduled items per day. If you try to schedule an activity on a day when you already have the maximum number of activities scheduled, you will receive a warning, and be given the option of scheduling the activity anyway. Select 0 if you do not want to set a limit. (The maximum limit that can be set is 999, per user, per day)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Minimum_Time_Gap_Between_Activities)<<1} Minimum Time Gap Between Activities

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Activity Preferences: Minimum Time Gap Between Activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Activity Preferences screen.

You may want to set a minimum interval between scheduled items to allow time for preparation and wrap-up before and after appointments and meetings. Type, or use the spinner arrows, to set the minimum time gap. If you try to schedule an activity that is within the specified time span following an existing activity, you will be given a warning and asked if you want to schedule the activity anyway.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_New_Alarm_Snooze_Interval)<<1} New Alarm/Snooze Interval

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Activity Preferences: New Alarm/Snooze Interval

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLPï¿½PREFSX_Activity_Preferences_New_Alarm_Snooze_Interval_Notes)<<1}

This option is accessed from the Activity Preferences screen.

The TeleMagic alarm program checks at regular intervals to determine if there are any alarms pending for which you need notification. The `New Alarm/Snooze Interval:` setting allows you to set that interval. Additionally, if you choose **Snooze** when an activity alarm goes off, the `New Alarm/Snooze Interval:` setting determines how much time you have before the alarm is re-activated.

When creating this setting, make sure that you have TeleMagic perform the check often enough that you are notified of alarms in a timely fashion, but not so often that snoozed alarms re-appear too frequently.

If you want to disable *all* occurrences of *all* alarms, set `Snooze Minutes:` to zero.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Activity_Preferences)<<1} Activity Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Contact Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Contact preferences are user-specific preferences. They allow you to instruct TeleMagic to automatically open and display the database, contact views, and pages you most often use.

## To Set Contact Preferences

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open.

2. From the Preferences screen, select the **Contact** tab.

   The Contact page will open.

   Follow instructions below for each preference set on the screen.

   Default Views
   Default Pages
   Startup Database

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Contact_Manager)<<1} Contact Management
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Contact Preferences: Default Views

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Contact Preferences screen.

The arrangement of all of the fields on all of the pages on one level of a database is called a view. You can create as many views for any database level as you like. (For example, you may have one view designed for telemarketers that only shows names and telephone numbers, and another designed for customer service personnel that includes names, phone numbers, plus financial history data.) If you have more than one view for each level of a database, you can select the view that you use most often on each level and set it as your default view for that level. TeleMagic will display the selected view by default whenever you open that level.

To select default views, use drop-down lists for each level and select from the lists of views that have been created for the current database.

When you select default views, they are set for the current User ID *and* the current database. This means that if you log in with a different User ID, *or* if you open a different database, you must re-set view defaults.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records.
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_is_a_Contact_View)<<1} What is a Contact View?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½PREFS_Default_Pages)<<1} Default Pages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Contact Preferences: Default Pages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Contact Preferences screen.

If you have more than one page in your default view, you can set a default for which page should display when that view is first opened. When you select a default page, TeleMagic will show that page first when you see the associated view. Leave this option blank if you want to go to the first page in the view when you open the database.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Startup_Database)<<1}Startup Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1}Setting Preferences

## Contact Preferences: Startup Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Contact Preferences page.

If you routinely use the same database, you may want to set it as your startup database. The `Startup Database` option allows you to select the database that should open by default when you first start TeleMagic, bypassing the Select Database selection box.

To select a startup database, select the database you want to use from the `Startup Database` drop-down list. (This list will include all databases to which you have access.) If you do not want a startup database, select the blank line at the top of the list.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Contact_Preferences)<<1} Contact Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Database Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

Database Preferences allow you to set default names for each contact database level, to create a controlling level for your database, to set the default currency symbol, to set up a standard contact address format, and to create your key fields for the database.

Keep in mind that Database preferences will affect the current database *only*, and that they will be in effect for *all* users of that database. Setting Database Preferences for one database does not automatically set them for any other databases. You will need to open each database in turn and set the database preferences.

### To Set Database Preferences:

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open.

2. From the Preferences screen click the **Database** tab.

   The Database Preferences screen will display.

3. Follow the instructions below for each preference set on the screen.

   Contact Level Name
   Controlling Level
   Currency Symbol
   Insert at Left or Right
   Sample
   Standard Address
   Lock Record When Dialed
   Apply Security in Activity Lists

4. Mark the `Calculate Upper Level on Save` and/or `Calculate Lower Level on Save` checkboxes to resolve calculated fields in records with the indicated relationship when the current record is saved.

5. Mark Save Merged Documents to retain a copy of each merged document that you fax and link them to the recipient's record.

**Warning!**
Selecting this option can result in large numbers of files being generated and stored.

6. Click **OK** to save all settings and exit.

**or** Click **Apply** to save settings and continue with other preferences.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Contact Level Name

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

TeleMagic allows three levels in any database. Each of these database levels can be given a name, using the `Contact level name` fields on this screen. (The names for the levels do not affect the operation of TeleMagic databases or the names of views created for those databases. They merely help you to identify your database levels in areas of TeleMagic where you are asked to specify a level.)

Use `Contact level name` fields `One`, `Two`, and `Three` to give each level a unique name (generally, in order to reflect its contents). Type the name you want on its respective line.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Controlling_Level)<<1} Controlling Level

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT1_Viewing_Contact_Records)<<1} Viewing Contact Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Controlling Level

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

When you first open a database, you can have TeleMagic go directly to a specified level (the controlling level). If you usually work on a particular level of the database, setting a controlling level will save you the time and effort of having to navigate to that level every time you open that database.

To set the controlling level, select the appropriate level name from the `Controlling level` drop-down list.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Currency_Symbol)<<1} Currency Symbol

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Currency Symbol

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Database_Preferences_Currency_Symbol_Notes)<<1}

This option is accessed from the Database Preferences screen.

Currency fields include a currency symbol to indicate that the data contained there represent a monetary amount. The default currency symbol is the dollar sign ($). If you require a currency symbol other than the default, enter the symbol you want in the `Currency Symbol` field.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Insert_at_Left_or_Right)<<1} Insert at Left or Right

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Insert at Left or Right

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

These two radio buttons determine whether the currency symbol is displayed on the left- or right-hand side of the amount. Select the radio button appropriate to the selected currency symbol.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Sample)<<1} Sample

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Sample

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

This is a picture of how currency data will be displayed, based on your currency settings. This field is a display-only field; it cannot be changed directly.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Lock_Record_When_Dialed)<<1} Lock Record When Dialed

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Lock Record When Dialed

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

`Lock record when dialed` is a safety feature which prevents users from dialing a contact or gaining edit access to a contact's record at the same time another user is dialing and/or talking to that same contact. When a user places a call to the contact, the record will be locked for the entire duration of the conversation.

If your users want to have exclusive rights to a record while they are talking to the contact, mark this field. With this box marked, other users will get a warning message if they attempt to change or dial to this record while a call is in progress. If you want other users to continue to be able to work with a record while a call is in progress, leave the box unmarked.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Apply_Security_in_Activity_Lists)<<1} Apply Security in Activity Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Apply Security in Activity Lists

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

You may access a list of activities for the current contact from either the Activity List (accessed from the View Activities button on the Contact Manager Toolbar), or by adding an Activity Rollup list to your contact view. The Activity List includes the activity's due date, type, description, status and the User ID of the user who created it. Rollups will include whatever activity information you specify when the rollup is created.

By default, all activities linked to the contact will be displayed, whether or not the user viewing the list has been granted permission to view the activity information of the user who created that activity. The `Apply Security in Activity Lists` check box allows you to apply security to the lists so that each user will view information only from the calendars of users who have granted them access.

If you want to have a complete list of activities linked to a contact, leave `Apply Security in Activity Lists` check box unmarked. If you want to respect users' security, mark this check box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Calc_Upper_Levels_on_Save)<<1} Calc Upper Levels on Save

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Calc Upper Levels on Save

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

This option allows you to update calculated fields that use the ChildSum( ) and ChildCount( ) functions as records are edited.

Calculated fields are filled in automatically based on the results of an expression, such as the sum of two other fields. When you click save after editing a record, TeleMagic will look on the current level for any calculated fields for the record and update them if your edits have changed the calculated value. Most calculated fields are based on fields from the current record or its parent or grandparent record. In these cases, updating the calculation can be accomplished very quickly.

Calculated fields that use ChildSum( ) and ChildCount( ), on the other hand, are based on totals from the child level. These functions either count the child records belonging to a parent, or they total the contents of a field across all of those child records. When a Level 2 or Level 3 record is edited, that edit could change the calculation results from an upper-level child sum or child count. Selecting this preference gives you the option of searching the upper level for a calculation using one of these functions, and recalculating it when you edit a child record. The advantage to this is that your upper level calculations will always accurately reflect the current data in the child records. Be aware, however, that in order to perform this recalculation, TeleMagic must analyze every child record belonging to the same parent as the current record. In some databases, this could be thousands of records, which could result in a significant delay every time a Level 2 or Level 3 record is edited. You may want to consider performing a test with this option marked to see if this will be an issue in your database.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Standard_Address)<<1} Standard Address

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Database Preferences: Standard Address

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

This option is accessed from the Database Preferences screen.

You have the ability to set up a standard address expression (consisting of fields and optionally, text and functions) for your contacts which will be copied to the Windows Clipboard when you press CTRL+P. Additionally, this address is used in Quick Letters and merged into the Standard Address directive used with the Windows Write and WordPad word processors.

Address fields are also established when you set up your Key Fields (see Key Field Preferences for details). You have the option of using your Key Field selections, or using the `Standard address` fields. The advantage of using the `Standard address` fields is that you will have access to the Expression Builder, which offers you further control over the address. If you want to use your Key Fields selection, simply leave all of the `Standard address` fields blank. (If there is an entry in even one of these fields, TeleMagic will use this information as your standard address.)

Click here for some advanced sample standard addresses.

## To Build a Standard Address:

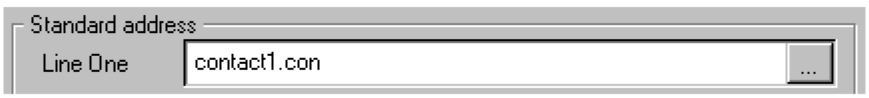
1. Choose **Line one**.

   The Standard Address Line Expression Builder dialog box will open. (For help in using the Expression Builder to create more complicated expressions, see the Expression Builder topic.)

   The Fields list will display all the fields for the current database.

2. Select the field name for the first line of the address (usually the contact name), then choose **OK**.

   The Expression Builder dialog box will close, and the field name will appear in the standard address **Line one** field:




3. Repeat steps 1 and 2 for each address line. Enclose text (including commas and spaces) in quotations. Using the trim( ) function around the field contact1.city removes any trailing blanks from the field as it prints.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Database_Preferences)<<1} Database Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Key Field Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

Every database level contains “key” fields, such as Company Name and Contact Name, which contain specific “key” information. TeleMagic uses the information in these fields when performing certain functions in the program, such as creating reports and sending faxes. For example, if you want to print a contact list report, TeleMagic needs to know which fields in the database contain the contact name, company name, and address.

Key Field preferences allow you to specify which Contact Manager fields will contain this key information.

**WARNING**

No security will be applied to your key fields. If you select a field that contains sensitive data, users who do not normally have access to that field will be able to view it where key fields are used. You should only use general-access fields as your key field selections.

## To Set Key Field Preferences:

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open.

2. From the `Preferences` screen, click the **Key Fields** tab.

   The Key Fields screen will open.

3. Using the `Key Fields for`: radio buttons at the top of this dialog box, select `Level 1`.

4. Click in the Selected Key field next to each key field name for a list of every available field in that database level.

5. Highlight the field in your database which will contain the key field information.

   **Example:** If you select the database field `Company {Com}` for the key field `Company`, any time TeleMagic needs to reference the company name it will pull the contents of the `Company {Com}` field on level 1.

6. Repeat this process for each key field on this database level.

7. Select the `Level 2` radio button.

8. Repeat steps 3 and 4 for this level.

   You will notice that the Level 2 field lists contain fields for both Levels 1 and 2. If the database field you want to assign as your key field does not exist on Level 2, you may select it from the Level 1 fields. Even if you have already defined this field as the key field in Level 1, you must also select it for Level 2 if you want TeleMagic to reference it when working in this level.

9. Select the `Level 3` radio button and assign the key fields. (You will be able to select fields from all three levels.)

10. When completed, click **OK** and your selections will be saved.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Using_the_Notepad)<<1} Using the Notepad

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Using_the_Fax_Stamp)<<1} Using the Fax Stamp

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_a_Controlling_Page)<<1} Setting a Controlling Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_up_a_Record_Descriptor)<<1} Setting up a Record Descriptor

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Adding_Wireless_Messaging_Fields_to_Your_Database)<<1} Adding Wireless Messaging Fields to Your Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Key Field Preferences: Using the Notepad

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Key Field Preferences screen.

The notepad in TeleMagic is a special memo field that is used to track contact information. For example, calls placed through the dialer, letters sent through word processing, and faxes sent to a contact are all logged in the notepad. In order to identify which memo field should be used as the notepad, in the past TeleMagic has required that a memo field be named Notepad. This is now handled through the Notepad key field. If there is a field named Notepad already existing in a database the first time it is opened after installing or upgrading to V4, the key field will default to this memo field. If you want to use the field named Notepad as your Notepad key field, you do not need to edit this setting. If you want to use a different field, or if there was no previously existing Notepad field, you will have to select a memo field from Key Fields.

The `Notepad:` drop-down list will only contain the memo fields in the database; other field types will not be listed. The memo field does not have to be displayed on any contact screen, but it must exist in the database in order to be selected as a Key Field. If there are no memo fields in the database, and you want to establish a Notepad for your records, see the Database Management Creating and Defining Fields topic for instructions on adding a memo field.

### Continue…


{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Key Field Preferences: Using the Fax Stamp

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLPï¿½PREFSX_Key_Field_Preferences_Using_the_Fax_Stamp_Notes)<<1}

This option is accessed from the Key Fields page of the Preferences dialog box.

The Fax Stamp Key Field is used to record information on the contact record concerning faxes to each contact. The type of field you select as your key field will determine what information is stamped in it.

If a fax is successfully sent, the following field types will be stamped according to these guidelines:

A memo field will be stamped with all details regarding the fax: the document(s) sent, the date and time it was sent, who sent it, etc.

A date field will be stamped with the date when the most recent fax was sent. (Each new entry will replace any previous entry in this field.)

A character field will be stamped with the date and the time the most recent fax was sent, the User ID of the sender, and as much of the fax's subject as will fit in the field. (Depending on the length of your character field, the fax subject may be partially truncated.) Each new entry will replace any previous entry in this field.

A numeric field will increase by 1 for each fax to a contact, thus indicating how many faxes have been sent to that contact.

A logical field (checkbox) will be turned "on" (or marked). This is useful if you are faxing to a filter and want an easy way to reference which contacts received the fax.

If a fax fails, only character or number fields will be stamped. If you are faxing locally, no stamp will be made: only when faxing with the Automation Server will the Fax Stamp key field be stamped.

When a fax fails, an X will be placed in the field, followed by the date of the fax, the percent of completion the fax reached before failing, and the number of pages that were successfully completed over the total number of pages. (For example, X 11/19/2099 75 3/4 would indicate the fax sent to the contact on November 19, 2099 was 75% complete, with three out of four total pages successfully sent, prior to failing.) This stamp is only used with faxes sent through the Automation Server.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Key Field Preferences: Setting a Controlling Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Key_Field_Preferences_Setting_a_Controlling_Page_Notes)<<1}

This option is accessed from the Key Field Preferences screen. Before accessing Key Fields, you should create the field you will be using to contain the controlling page information. (See the Creating and Defining Fields topic for more information.)

Setting a controlling page allows you to have a particular page open automatically whenever you scroll to a record. While you can set a default page in Contact preferences that will open automatically when you open the database level, that choice assumes you will want to view the same page for all records. This may not always be the case. For example, you may want to open the record of a sales lead to a page containing information on the status of the sale, but want to open the record for an existing customer to their account status page.

You can create a field to contain the names of the pages on the current level, then select that field as your Controlling Page key field. If you want a particular record to open automatically to a certain page whenever it is accessed, enter the name of that page in the field. When the record is opened, TeleMagic will read the contents of that field and open the appropriate page. (It is strongly recommended that you place a validated list box on the selected field containing the names of the pages on the level.)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Key Field Preferences: Setting up a Record Descriptor

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Key Field Preferences screen.

The record descriptor is used throughout TeleMagic to identify a record. For example, the title bar of the contact screen contains the record descriptor for the current record. The record descriptor will also be used in areas where TeleMagic needs to reference the contact, such as when setting recalls or in the Dialer, but there are no key fields defined for company or contact on the current level. (In these areas, if both the company and contact are defined, TeleMagic will show “Contact at Company”. If only one of these fields is defined, that information will be provided. If neither is defined, the record descriptor will be given.)

A default record descriptor has been provided which uses your company and contact key fields. If you want to change this, you can create an expression to specify the information you want to include in the descriptor.

## To Create a Record Descriptor:

1. At the Key Fields preference screen, use the `Key Fields for:` radio buttons at the bottom of this screen to select the database level for which you want to create a descriptor.
2. Click the **Record Descriptor** button.

   The Expression Builder will open.
3. Create an expression that will define each record on the level. (See Expression Builder for help with creating expressions.)

   **Example**: On Level 3 of the Documentation database, you may want to use the contact name and contract number as the descriptor. Your expression may look something like this:

   “Contact: ” + trim(contact2.contact) + “; Contract Number: ” + trim(contact3.conno)

   For the Level 3 record for Tom Kennedy at Kingcrest Distributing the record descriptor would look like this:

   Contact: Tom Kennedy; Contract Number: Con941026003
4. Click **OK** to save the expression.
5. Select the next database level for which you want to define an expression, and repeat steps 3 through 5.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Key_Field_Preferences)<<1} Key Field Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Dialer Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Dialer preferences are user preferences that allow TeleMagic to properly auto-dial your phone. To use the dialer efficiently, you should specify your area code, dialing prefixes, the type of phone you use, and the computer port to which the phone is connected.

You can also specify how you want to handle notes about your call, and whether you want TeleMagic to dial the next contact immediately.

## To Set Dialer Preferences

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open.

2. From the `Preferences` screen, click the **Dialer** tab.

   The Dialer preferences screen will display.

3. Follow instructions below for each preference set on the screen.

   - Local Area Code
   - Dialer Prefix
   - Prefix for Local Call
   - Prefix for Long Distance Call
   - Prefix Override Character
   - Dialer Suffix
   - Zoom Dial
   - Create Activity
   - Insert Notes into Notepad
   - Prompt for Setting Recall
   - Initially Bring up Call Notes
   - Tone or Pulse

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½DIALER_Phone_Calls)<<1} Phone Calls

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Dialer Preferences: Local Area Code

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Dialer_Preferences_Local_Area_Code_Notes) <<1}

This option is accessed from the Dialer preferences screen.

It is important to type in the correct area code so that TeleMagic knows what numbers are local numbers. When you enter a new record into TeleMagic, you should enter the *entire* phone number for a contact—including area code. Then, when you want to call this number, TeleMagic will automatically dial the area code only when appropriate.

If you move, your area code changes, or you are using a computer on the road, simply change the `Local Area Code` entry, instead of changing all of the records. TeleMagic will know not to dial the long distance code and area code for these local calls.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Prefix)<<1} Dialer Prefix

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Dialer Preferences: Dialer Prefix

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpID(TM.HLP>hintsï¿½PREFSX_Dialer_Preferences_Dialer_Prefix_Notes)<<1}

This option is accessed from the Dialer preferences screen.

This field should contain any digits that you need to dial in order to get an outside line. For example, PBX or Centrex systems often require a 9 to access an outside line. When auto-dialing phone numbers, TeleMagic automatically adds the prefix to every phone number. (Not all phone systems will require an entry in this field. For example, if you are sharing a single-line telephone with your computer and your phone gives you an outside line whenever you pick it up, you should leave this field blank.)

If you need TeleMagic to pause after dialing the prefix before proceeding with the rest of the number, enter a comma (,) after the prefix in this field. This is a Hayes command meaning “pause for two seconds.” This gives the telephone system time to find and activate an outside line (the secondary dial tone).

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Prefix_for_Local_Call)<<1} Prefix for Local Call
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Dialer Preferences: Prefix for Local Call

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<PopupID(TM.HLPï¿½PREFSX_Dialer_Preferences_Prefix_for_Local_Call_Notes)<<1}

This option is accessed from the Dialer preferences screen.

If you must dial any number prior to placing a local call that you do not have to dial when placing a long distance call, enter it in this field.

If you have entered a number in the `Dialer Prefix` field, above, it will be dialed with all local and long distance numbers and does not need to be entered in this field. If you do so, TeleMagic will read and dial the Dialer Prefix, then read and dial the Prefix for Local Call, resulting in the number being dialed twice. This field should only contain any prefix unique to local calls. It may or may not be applicable to your phone system.

If you need TeleMagic to pause after dialing the prefix before proceeding with the rest of the number, enter a comma after the prefix in this field. This is a Hayes command meaning “wait two seconds after dial tone before dialing further numbers.” This gives the telephone system time to find and activate an outside line (secondary dial tone).

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp| ______154.BMP<JumpId(TM.HLPï¿½PREFS_Prefix_for_Long_Distance_Call)<<1} Prefix for Long Distance Call

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp| ______154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Dialer Preferences: Prefix for Long Distance Call

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer preferences screen.

Enter any number that must be dialed when placing a long distance call that is not required when placing a local call. (For example, in North America the prefix for long distance calls is generally 1.) If necessary, you can use a comma to cause a two-second delay after dialing the prefix. (See the Dialer Prefix topic for more information on this command.)

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Prefix_Override_Character)<<1} Prefix Override Character

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Prefix Override Character

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer preferences screen.

When an override character is placed in a phone field in a contact record, it tells TeleMagic to dial the phone number without modification. The Local and Long Distance prefix characters will not be included with the phone number. The override character does not override the Dialer Prefix. The override character can appear anywhere in the phone field.

The default override character is the caret (^). You may select a different symbol, but you should not select the pipe character ( | ) as the override character. This character is used in fax fields to instruct TeleMagic not to send faxes to a number. If you select a different symbol, be sure to choose something that is unlikely to be placed in a phone number.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Suffix)<<1} Dialer Suffix
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Dialer Preferences: Dialer Suffix

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Dialer_Preferences_Dialer_Suffix_Notes)<<1}

This option is accessed from the Dialer preferences screen.

This string is sent out at the end of each phone number that is dialed. In more sophisticated telephone systems, this can be a clever way to transfer calls from single-line dialers to multi-line telephones (so modem- or dialer-initiated calls can appear on a telephone with advanced features). It can also enter a charge code for long-distance calls. We recommend you contact your telecommunications professional for more information.

If you need TeleMagic to pause before dialing the suffix, enter a comma before the suffix in this field. This is a Hayes command that will insert a two-second pause before the suffix is dialed.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Zoom_Dial)<<1} Zoom Dial

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Dialer Preferences: Zoom Dial

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer preferences screen.

`Zoom Dial` facilitates high-volume calling by automating repetitive tasks. If you mark `Zoom Dial`, as soon as you terminate a call and finish your process for the termination of the call (setting a recall, finishing the call notes, etc.), TeleMagic will immediately go to the next contact in the selected filter and index. It will then proceed either to launch the Dial menu -- if you selected that first to dial the record -- or to dial the selected phone number, if you used the Phone Icon next to a phone field to start the Zoom Dial process. If you are conducting telemarketing sales, phone surveys, or other tasks which require high-volume dialing, you should turn on `Zoom Dial`.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Insert_Notes_into_Notepad)<<1} Insert Notes into Notepad

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Dialer Preferences: Insert Notes into Notepad

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer preferences screen.

Mark `Insert Notes into Notepad` if you want to record the date, time, and description of your call, plus call notes in the contact's notepad field as defined in Key Fields.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Create_Activity)<<1} Create Activity

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Dialer Preferences: Create Activity

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer preferences screen.

You have the option of creating a linked activity every time you place a call to a contact using the dialer. Mark the `Create Activity` check box if you want an activity created whenever you complete a call for a contact. The activities will be given the activity type `Call`, and will appear in your calendar and on the contact's activity list.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Prompt_for_Setting_Recall)<<1} Prompt for Setting Recall

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Dialer Preferences: Prompt for Setting Recall

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Dialer_Preferences_Prompt_for_Setting_Recall)<<1}

When you are tracking your dialer activity, TeleMagic opens a Call Notes dialog box where you can create the record of the call. If you have not selected `Create Activity` or `Insert Notes into Notepad`, call notes will not be recorded and you will not receive a Call Notes dialog box. One feature of the Call Notes dialog box is the ability to select a recall at the conclusion of the call. If you will not be recording call notes and want to receive a prompt asking if you want to set a recall at the conclusion of each call, mark this check box. If you do not want to be prompted, leave this box unmarked.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Initially_Bring_up_Call_Notes)<<1} Initially Bring up Call Notes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Dialer Preferences: Initially Bring up Call Notes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Dialer_Preferences_Initially_Bring_up_Call_Notes_Notes)<<1}

The Call Notes dialog box is used to record the information that will be stamped into the contact's notepad and/or included in the related activity. If you want the Call Notes dialog box to come up immediately after a call is dialed or answered, mark this check box. If you would prefer to go to the contact's record first, then access the dialog box using the **Call Notes** button on the toolbar, uncheck this box.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Tone_or_Pulse)<<1} Tone or Pulse

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Dialer Preferences: Tone or Pulse

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer preferences page.

While most modern telephone systems and telephone central offices support touch-tone (tone) dialing, older systems supported pulse dialing (which sounds like clicks). Tone is the default selection. If you cannot use Tone, mark the Custom Configuration checkbox and select the `Pulse` radio button.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Dialer_Preferences)<<1} Dialer Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Custom Dialer Configuration: Com Port

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Dialer Preferences page. To access Custom Dialer Configuration, Mark `Custom Configuration` and click **Settings**.

Use the `Com Port:` field to enter the COM Port where the dialing device you will be using is attached.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Directory Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

You can store Function Key, List Box, and Toolbar Preferences settings in any one of three directories: Global, Database, or User.

- Changes made to settings stored in a `Global Directory` (the directory where all of your TeleMagic files are located) will affect all users in all databases.
- Settings stored in a `Database Directory` are valid for all users, but only in the current database. Changes to settings stored in a `Database Directory` will affect all users whenever they open the current database.
- Settings stored in the `User Directory` will be valid for all databases, but only for the current user.

## To Set Directory Preferences:

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open.

2. From the `Preferences` screen, click the **Directory** tab.

   The Directory Preferences screen will open.

3. Select the storage location of your function keys, list boxes, and toolbar following the guidelines below.

   - When you save your Directory Preferences, if you have chosen to store an item in a location, and files do not currently exist for that item in the specified location, you will receive a message informing you of that fact, and asking if you want to create the files in that location.
   - Click **Yes** to create the files in the selected location; **or**
   - Click **No** to cancel this operation and return to Preferences without saving any of your Directory settings.
   - If you select **Yes**, a message will appear asking if you want to transfer the existing files to the new location.
   - This allows you the option of transferring the file existing in the item's current storage location to the new storage location. For example, if you have been using function keys stored in the global directory (the directory where TeleMagic is installed), and are now going to be storing your function keys in your user directory, this gives you the option of copying the existing global function keys to your user directory so that they will continue to be available for your use. (The transfer is performed only once. Any new function keys added to the global directory after the transfer will not be copied to

your user directory.)

- To transfer the items to the new location, select

**Yes**. If you select **No**, the files will be created in the new location, but they will be empty (e.g., there will be no function keys listed in Function Key preferences).

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Function_Keys)<<1} Directory Settings for Function Keys

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_List_Boxes)<<1} Directory Settings for List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Toolbar_Configuration)<<1} Directory Settings for Toolbar Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Sending Preferences

# Directory Preferences: Function Keys

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Directory_Preferences_Function_Keys_Notes) <<1}

This option is accessed from the Directory Preferences screen.

Function Keys is a TeleMagic feature that allows you to automate functions that you perform frequently, and to execute those functions with a single keystroke or click of a button. For example, if you fax out a weekly newsletter, you can assign the task as a function key, so that clicking one toolbar icon will open the fax feature, select the document, select the filter, and queue the fax.

If you primarily create function keys to perform database-specific tasks, consider storing your function keys in the database directory. If you want to use database-specific function keys, Open the Preferences dialog box and select **Directory**. Select the `Database Directory` radio button in the `Function Keys` row. Any function keys you set up while a database is open will be accessible from that database by you and any other users who have their function keys set to the database directory. (They will not be accessible from other databases. If you need to access a function key in more that one database while storing them in the database directory, you will need to create it in each database separately.) You will also be able to access any function keys set up in the current database by any other users using the database directory.

If you want to create function keys for your personal use only, select the `User Directory` radio button. Any function keys you create will be accessible from anywhere within TeleMagic whenever you log in using your User ID. (You will not be able to share function keys with other users with this setting.)

If you want to create function keys that can be shared with other users, and that are available in all areas of TeleMagic, regardless which database is open, select the `Global Directory` radio button. Any function keys that you set up will be available to any other users who also have their function keys set to the global directory; you will also be able to access any function keys those users have set up.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Function_Key_Setup)<<1} Function Key Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Preferences)<<1} Directory Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_List_Boxes)<<1} Directory Settings for List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Toolbar_Configuration)<<1} Directory Settings for Toolbar Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Directory Preferences : List Boxes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Directory_Preferences_List_Boxes_Notes)<<1}

This option is accessed from the Directory Preferences screen.

List boxes allow you to quickly fill in fields by selecting an item from a list. You populate the lists with items that would commonly be entered into the field. (For example, a list box for a State field would contain the states.)

If you want to store list boxes in the global directory (the directory which contains all of TeleMagic's files), select the `Global Directory` radio button in the `List Boxes` row. Any list boxes that you set up will be available to any other users who also have their list boxes set to the global directory, and you will be able to access any list boxes those users have set up. Note that with this setting, any of your contact databases that share the same structure will use the same list boxes for the same fields.

If you want to store list boxes in the database directory, select the `Database Directory` radio button. With this option selected, any list boxes you set up will be accessible by yourself and any other users who have their list boxes set to the database directory. You will also be able to access any list boxes created by any other users using the database directory. List boxes will only be accessible, however, when you are in the contact database in which the list box was created. Be aware that with this option selected, any list boxes that you create for other areas of TeleMagic, such as the Activity Manager and Sales Forecasting, will only be accessible when you have the relevant database open. (If you have no contact database open, the global directory, where TeleMagic is installed, will be used.)

If you want to create list boxes for your personal use, select the `User Directory` radio button. Any list boxes you create will only be accessible when you log in using your User ID. (You will not be able to share list boxes with other users when using this setting.)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CONTACT3_Creating_Adding_To_and_Selecting_From_List_Boxes)<<1} Creating, Adding To and Selecting From List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Function_Keys)<<1} Directory Settings for Function Keys

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Toolbar_Configuration)<<1} Directory Settings for Toolbar Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Directory Preferences : Toolbar Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLPï¿½PREFSX_Directory_Preferences_Toolbar_Configuration_Notes)<<1}

This option is accessed from the Directory Preferences screen.

TeleMagic allows you to customize the toolbar that appears above the contact screen. A number of pre-defined tools have been provided to correspond to most TeleMagic menu options. Adding these tools to the toolbar allows you to access these options without having to open a menu.

If you perform different tasks for different databases, consider storing your Toolbar Preferences in the database directory. If you want to use database-specific toolbars, from the Preferences dialog box, click on the **Directory** tab, to bring up the Directory page. Select the `Database Directory` radio button in the `Toolbar Preferences` row. The toolbar that you set up for a database will be accessible from that database by you and any other users who have their Toolbar Preferences set to the database directory. Additionally, if any other users make changes to the toolbar for a database, you will see those changes when you open the database.

If you want to customize the toolbar for your personal use only, select the `User Directory` radio button. Your toolbar will be accessible from anywhere within TeleMagic whenever you log in using your User ID. (You will not be able to share the toolbar with other users.)

If you want to share a toolbar with other users, and use the same toolbar regardless of which database is currently open, select the `Global Directory` radio button. (The global directory referred to is the \TM4\COMMON directory.) You will access the same toolbar as any other users who also have their Toolbar Preferences set to the global directory.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Toolbar_Configuration)<<1} Toolbar Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Preferences)<<1} Directory Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Function_Keys)<<1} Directory Settings for Function Keys

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_List_Boxes)<<1} Directory Settings for List Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Display Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Data display preferences are user preferences that allow you to choose the display formats you want to use for time and numbers. You can also specify how your cursor will move among fields during data entry, and control the color palette used with OLE objects.

## To Set Display Preferences:

1. From the **Options** menu, select **Preferences**.

   The Preferences dialog box will open.

2. From the Preferences screen click the **Display** tab.

   The Display Preferences screen will display.

3. Follow instructions below for each preference set on the screen.

   Time Format
   Example (Number Display)
   Data Entry Bell
   Force Tab Every Field
   List Box on Date Fields

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Display Preferences: Time Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Display preferences screen.

Choose the `12 Hour` radio button to display times in American standard format (**Example:** 1:00 p.m.). Choose the `24 Hour` radio button to display times in International standard format (**Example:** 13:00).

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Number_Display)<<1} Example (Number Display)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Display Preferences: Example (Number Display)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Display preferences screen.

American standard number display uses a period (.) to separate decimals, and a comma (,) to separate thousands. International displays vary. For example, German-speaking countries use a comma (,) to separate decimals, and a period (.) to separate thousands.

Type your decimal and thousands separator preferences in the `Decimal Point Symbol:` and `Separator Character:` fields. A sample number using your preferences will appear in the `Example:` field.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½PREFS_Data_Entry_Preferences)<<1} Data Entry Bell/Force Tab Every Field
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Display Preferences: Data Entry Bell/Force Tab Every Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Display_Preferences_Data_Entry_Preferences _Notes)<<1}

These options are accessed from the Display preferences screen.

A *data entry bell* warns you that you have filled a field. To turn on the data entry bell, mark the `Data Entry Bell` checkbox. To turn off the data entry bell, unmark the check box.

As you type data into a field, you have the choice of allowing TeleMagic to move the cursor to the next field when the current field is full, or to move to the next field only when you press TAB or ENTER.

If you want to confirm by pressing TAB that entries are correct before moving to the next field, mark the `Force 'Tab' every field` checkbox. If you want to allow maximum data entry speed, unmark the `Force 'Tab' Every Field` checkbox.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp| ______154.BMP<JumpId(TM.HLPï¿½PREFS_List_Box_on_Date_Fields)<<1} List Box on Date Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp| ______154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Display Preferences: List Box on Date Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Display preferences screen.

Pressing F2 or clicking the right mouse button when your cursor is in a field causes a list box to appear for quick data entry. When working in date fields, you have the option of accessing a list box or a calendar where you can select the appropriate date.

To cause a Go To Date calendar to pop up in place of a list box when you press F2 with you cursor on a date field, leave the `List Box on Date Fields` check box, *unchecked*. Place a mark in the check box if you want to access a list box instead.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Display_Preferences)<<1} Display Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# E-mail Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

E-mail preferences are set from TeleMagic Internet Mail, unlike other TeleMagic features whose preferences are set from the TeleMagic Preferences dialog box. TeleMagic Internet Mail can be run independently of TeleMagic, therefore setup options must be set within TeleMagic Internet Mail.

When setting E-mail preferences, you can click **Apply** at any time to save all changes and leave the Preferences dialog box open. You will not necessarily need to change all settings from the defaults, but it is recommended that you familiarize yourself with the available options.

The following jumps will take you directly to specific preference sets within this procedure:

| | |
|---|---|
| Display preferences - | step 3 |
| Servers | step 7 |
| Delivery | step 17 |
| Spelling | step 22 |
| TeleMagic | step 24 |
| Automation Server | step 31 |
| Filters | step 37 |
| Addresses | step 41 |

## To Set E-mail Preferences:

1. From the **Tools** menu in TeleMagic Internet Mail, select **Options**.

   The Preferences dialog box will open.

2. The first page of the Preferences dialog box is where general preferences are set. Use the following guidelines to set preferences on this page.

   Mark the **Send deleted files to Deleted Items folder** checkbox if you want to save deleted messages in a separate folder before permanently deleting the message. If you do not mark this, messages will be permanently deleted when you delete them from the Inbox, or other directory.

   If you have marked the **Send deleted files to the Deleted Items folder** checkbox, the **Empty Deleted Items** radio buttons will be available:

   - Choose **at start up** to empty your Deleted Items folder when you first start TeleMagic Internet Mail.
   - Choose **on exit** to empty your Deleted Items folder when you close TeleMagic Internet Mail.
   - Choose **never, I will delete them manually** to disable automatically emptying the Deleted Items folder.

- Mark the **Warn me before permanently deleting mail** checkbox to receive a message before any message is permanently deleted. You will only receive this warning if you chose to delete messages manually. There is no warning when messages are deleted at start up or on exit.

Mark the **Include original message in reply** to add the text of a received message to your reply to that message.

Mark the **Send mail as Rich Text by default** checkbox to include text effects, such as boldface or italic, in your message.

Mark the **Store mail encrypted** checkbox for added security.

Designate the location for any files attached to your incoming mail to be stored. Enter the path in the **Attachment Directory** text field.

**or** Click on the **Attachment Directory** button and use the Select Directory dialog box to browse for the desired location.

Mark the **Make TeleMagic Internet Mail my default mail client** to make TeleMagic Internet Mail your primary mail service.

3. Click on the **Display** tab.

   The Display page will open.

4. Set your display preferences according to the following guidelines:

   - Mark the **Show Toolbar** checkbox to display the toolbar. Unmark this checkbox if you prefer to use the menu exclusively.
   - Mark the **Show Status Bar** checkbox to display a message at the bottom of the TeleMagic Internet Mail screen which provides a brief description of the selected item.
   - Mark the **Show Folders** checkbox to display a tree view of your folders on the left-hand side of the TeleMagic Internet Mail screen.
   - Mark the **Show Message Body** checkbox to display the text of the selected message in the lower half of the TeleMagic Internet Mail screen.
   - Mark the **Use Default Display Configuration** checkbox to show new messages in boldface and all others in normal font.

   If you unmark the **Use Default Display Configuration**, use the following guidelines to customize your display:

   - For each message status, select the color to be used from the drop-down list associated with that status.

- For each message status, mark the associated checkboxes for the desired font effects (**bold**, *italic*, underline, and ~~strikethrough~~). You can select any combination of font effects. Leave all checkboxes unmarked for normal font.

Messages will be displayed according to the choices indicated.

5. Click on the **Font** button.

   A font selection box will open.

6. Select the font you want to use to display your messages. This setting only affects messages as displayed on your system, your messages will be displayed on your recipients system according to their preferences.

7. Click on the **Servers** tab.

   The Servers page will open.

8. You will need to establish at least one server.

9. To remove a server, highlight it and click **Remove**.

10. To modify a server, highlight it and click **Properties**.

11. To set a server as your default, highlight it and click **Set as Default**.

12. Choose your MAPI logon procedure using the **Logon to MAPI** radio buttons:

    - Select **Prompt at Startup** to receive a prompt when opening TeleMagic Internet Mail before logging on to MAPI.
    - Select **Always** to log on to MAPI each time you open TeleMagic Internet Mail.
    - Select **Never** to open TeleMagic Internet Mail without MAPI. Select this radio button if you do not have MAPI.

13. If you selected **Prompt at Startup** or **Always** in step 12, you have the option of sending mail through the MAPI server. Mark the **Send Internet Mail through MAPI Server** checkbox to accept this option.

14. Enter the name of your MAPI server in the **Mailbox Name** field.

15. Enter your password in the **Password** field.

16. Mark the **Use Default Profile** checkbox to use your default MAPI profile when logged on to MAPI.

17. Click on the **Delivery** tab.

    The Delivery page will open.

18. To periodically check for mail, mark the **Check for message every** checkbox. Enter the desired interval in the **Minutes** field either by typing the interval in the field directly or by using the spinner arrows.

    If you do not choose this option, you will need to check your mail manually.

19. To limit the size of messages received, mark the **Don't download messages greater than** checkbox. Enter the maximum size of message, in kilobytes, you are willing to accept in the **K** field. You can type the amount in directly, or use the spinner arrows.

20. Select the notification method you prefer from the **When new mail is received, notify me** radio button choices:

    - Choose **Never** to receive no notification of new mail.
    - Choose **Visually** to receive a popup message when you receive a message.
    - Choose **Audibly** to play an audio file when you receive a message.
    - Choose **Visually and Audibly** to receive a popup message and play an audio file when you receive a message.

21. If you chose either of the choices involving audible notification in step 20, you will need to select an audio file to be played. Enter the path and file name for the file you want played in the Audio File field. Or, click on the ellipsis button on the Audio File field to open the Open dialog box.

22. Click on the **Spelling** tab.

    The Spelling page will open.

23. Choose your spelling preferences according to the following guidelines:

    - Mark the **Automatically Spell Check messages when sending or queuing** checkbox to automatically check all messages. The check will be performed prior to being sent to the recipient or queue.
    - Mark the **Ignore Uppercase words** checkbox to skip words which are entirely in uppercase.
    - Mark the **Ignore words containing numbers** to accept this option.

- Mark the **Ignore HTML tags** checkbox to ignore this type of text.
- Mark the **Ignore URL's and email addresses** checkbox to skip this type of text.
- Mark the **Check for repeated words** checkbox to flag instances where the same word appears consecutively without intervening punctuation.
- Mark the **Auto-suggest** checkbox to have the Checker offer possible correct spellings for any misspellings encountered.
- Mark the **Recheck replaced words** checkbox to run the Checker again on any word that you replace which was misspelled.

24. Click on the **TeleMagic** tab.

    The TeleMagic page will open.

25. Choose the **Log on to TeleMagic** radio button to determine whether to automatically open TeleMagic when you launch TeleMagic Internet Mail. The following choices are available:

    - **Always** if you want to launch TeleMagic whenever you start TeleMagic Internet Mail.
    - **Prompt on Startup** to be given the option of launching TeleMagic each time you start TeleMagic Internet Mail.
    - **Never** to launch TeleMagic Internet Mail without launching TeleMagic.

26. The path of your TeleMagic installation appears in the **Enter the location of your TeleMagic installation** field. You can correct this by entering the correct path in the field, or by clicking **Modify** and browsing for the installation.

27. Under **Enter your TeleMagic Login Information** fields:

    - Enter your TeleMagic user ID in the **UserID:** field.
    - Enter your TeleMagic password in the **Password:** field.

    These fields may be left blank if you will not be launching TeleMagic automatically.

28. Select the scope of Goto searches by selecting one of the **When using Goto based on the e-mail address, look for the contact in:** radio buttons:

    - Select **Current Database** to restrict the search to the open database.
    - Select **All Databases** to search all available

databases for the address.

- Select **Current database first, then prompt for all** to always search the open database, and then offer the option of proceeding to the rest of the available databases.

29. Mark the **Automatically link incoming mail** to establish a link for each piece of mail you receive.

30. Under **When linked mail is sent**:

    - Mark the **Stamp Notepad** checkbox to enter the date and time of the message in the contact's notepad.

    - Mark the **Create Activity** checkbox to add the e-mail to your calendar.

31. Click on the **Automation Server** tab.

    The Automation Server page will open.

32. Click on the **New** button to establish an Automation Server account.

33. To remove an Automation Server account, highlight it and click **Remove**.

34. To change an existing Automation Server account, click **Properties**.

35. Mark the **Send email notification of failure** checkbox to be informed by e-mail of any queued messages which could not be sent.

36. Mark the **Fail on invalid merge field** checkbox to fail any message which has an attachment containing an invalid merge field.

37. Mark the **Stamp Notepad** checkbox to add an entry to the linked contact when the message is sent.

38. Mark the **Create Activity** checkbox to create an activity for the originating user when the message linked to a contact is sent.

39. Click on the **Filters** tab.

    The Filters page will open.

40. Click **New Filter** to create a new mail filter.

41. To remove a filter, highlight it and click **Remove**.

42. To edit a filter, highlight it and click **Properties**.

43. Click on the **Addresses** tab.

    The Addresses page will open.

44. Select your preferred format for displaying names in

addresses from the choices offered.

45. Click **OK** to save all changes and exit.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½tmmail_Introduction_to_TeleMagic_Internet_Mail)<<1}

# Fax Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

If you want to send faxes locally, you will need to set your Faxing Preferences. Fax Preferences allow you to do things such as: having TeleMagic configure your faxmodems in your system; giving your faxmodem a “name;” indicating whether you want to use or ignore any locally installed faxmodem; and even switching your faxmodem’s speaker on and off. Additionally, you can set defaults for sending options which will be applicable whether you are faxing locally or to a fax queue.

## To Set Faxing Preferences:

1. From the **Options** menu, select **Preferences**.
2. From the Preferences dialog box, click on the **Fax** tab.

   The Fax Preferences page will display.
3. Follow the guidelines below for each preference set on the screen.

   Fax Local ID
   Close Word Processor After Faxing
   Use Dialer Prefix
   Modem Speaker On
   Use Local Faxmodem
   Configuration
   Sending Preferences (Check Boxes)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Using_the_Fax_Stamp)<<1} Using the Fax Feature
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Fax Preferences: Fax Local ID

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Fax_Preferences_Fax_Local_ID_Notes)<<1}

This option is accessed from the Fax Page of the Preferences dialog box.

In this field, type a name that will readily identify the origin of your local faxes, such as the name name of the company and telephone number where the fax is being transmitted from.The fax ID can be up to 20 characters in length, and can contain spaces and special characters.

Each user in the system can set up a different fax ID.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Close_Word_Processor_After_Faxing)<<1} Close Word Processor After Faxing

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Fax Preferences: Close Word Processor After Faxing

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Fax Page of the Preferences dialog box.

When you are sending a fax locally, TeleMagic will open your word processor when processing the fax. If you want to have TeleMagic close the word processor after completing the fax, mark this box.

**WARNING**

If your word processor was open prior to sending the fax and you have this option selected, TeleMagic will **not** prompt you to save your work before the word processor closes. Always save your work before initiating the feature, if you are faxing locally and have selected this option.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Use_Dialer_Prefix_Fax)<<1} Use Dialer Prefix

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Fax Preferences: Use Dialer Prefix

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Fax Page of the Preferences dialog box.

On the Dialer Preferences screen, there is an option called `Dialer Prefix` where you enter the number you normally dial to get an outside line. In many cases, you will need to dial that number when making a phone call, but not when sending a fax. If you want TeleMagic to ignore this prefix when sending a fax, leave the `Use Dialer Prefix` option unchecked. Mark this option if you want TeleMagic to use the prefix as entered on the Dialer Preferences screen.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Modem_Speaker_On_Fax)<<1} Modem Speaker On

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Fax Preferences: Modem Speaker On

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Fax Page of the Preferences dialog box.

Mark this check box if you want to hear the initialization and dialing sounds made by your faxmodem when you send a fax locally.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Use_Local_Faxmodem)<<1} Use Local Faxmodem
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Fax Preferences: Use Local Faxmodem

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEUP01.BMP<JumpId(TM.HLPï¿½PREFSX_Fax_Preferences_Use_Local_Faxmodem_Notes)<<1 }

This option is accessed from the Fax Page of the Preferences dialog box.

Mark this check box if you have a faxmodem installed locally (i.e., on the computer from which you are running TeleMagic) and want to use it. If you do not mark this check box, TeleMagic will automatically assume you want to send all faxes to the fax queue where they will be processed. Choosing this option will make the `Use Dialer Prefix` and `Modem Speaker On` check boxes available.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Configure_Faxmodem_s)<<1} Configuration

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Fax Preferences: Configuration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Fax Page of the Preferences dialog box.

If you will be faxing locally, you must have a faxmodem installed on the workstation from which you will be faxing. (See the Faxing topic for more information on preparing your system for faxing.) Once you have installed and tested a faxmodem on your local workstation, you must configure the modem for use with TeleMagic.

If you are running Automation Server and TeleMagic on the same workstation, they will use the same modem for faxing. If you change the information in one, it will change in the other as well.

## To Configure a Local Faxmodem:

1. In the Fax Preferences page, click **Configuration**.

   The Faxmodem Configuration dialog box will open.

2. If you want to have TeleMagic configure your faxmodem automatically, click **Auto Configure**.

   There will be a pause (automatic configuration can take up to five minutes to perform) while TeleMagic checks your system for faxmodems. When completed, the faxmodems that were found will be listed in the field on the left.

**or** If you know the COM port to which your faxmodem is attached, click **Manually Configure**.

   The Configure Modem dialog box will open.

3. Select the COM port to which the faxmodem is attached from the drop-down list.

   TeleMagic will configure the faxmodem located at this port and enter the class and port in the Faxmodem Configuration box. (If there is no modem or an incompatible modem at the specified port, it will return an `Unable to Add Device` message.) Repeat this process for each COM port with a faxmodem attached.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Sending_Preferences)<<1} Sending Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Fax Preferences: Sending Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Fax Page of the Preferences dialog box.

The `Sending Preferences` check boxes allow you to set defaults for what occurs when you send a fax, whether you are faxing locally or to a queue. These defaults can be changed at the time you actually send the fax.

- Select `E-mail Notify` if you want TeleMagic to send you an e-mail message after a fax has been successfully processed. The e-mail message will note the details of the fax.

- Select `E-mail on Failure` if you want to be notified by e-mail in the event of an unsuccessful fax.

- Select `Create Activity` if you want TeleMagic to create a linked activity with the type `LetterFax` and the status `Completed` in your Activity Manager.

- Select `Notepad Stamp` if you want a “Sent fax” note stamped in the contact’s notepad.

- Select `Monitor Fax (Local)` if you want to have TeleMagic inform you of the status of the fax. (This is only available if you are faxing locally.)

- Select `Notification (Local)` if you want a pop-up to appear notifying you on successful completion of the fax. (This is only available if you are faxing locally.)

- Select `Stamp Comments` if you want fax cover comments stamped into the contact’s notepad, the activity comments field in the Activity Manager, and/or the `Fax Stamp` field established in Key Fields, if that key field is a memo field.

- Select `Stamp Documents` if you want a list of the documents (path and file names) that were sent with the fax stamped in one or more of three locations: in the contact’s notepad, in the activity comments field in the Activity Manager; and/or the `Fax Stamp` field established in Key Fields, if that key field is a memo field.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Fax_Preferences)<<1} Fax Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Function Key Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Many TeleMagic users will have regular tasks they want to make simpler; TeleMagic function keys can accomplish this. They allow you to automate common operations, so a single keystroke can do just about anything: place a time stamp in the notepad field or export records from one database and import them into another. Function keys are set up using TeleMagic expressions, which allow a great range of activities.

Because of their power, they can also become very complex. You should become familiar with expressions if you want to harness the full power of function keys; experiment by assigning an expression to a key and trying it out. If you gradually add more complex functions to keys, you are more likely to get the intended result.

See the Expression Builder topic for details on creating TeleMagic expressions.

It is important to keep in mind that TeleMagic is closely integrated with many Windows features. This integration can cause problems when it comes to writing function keys, since Windows features will not recognize internal TeleMagic macros. For example, if you are trying to write a function key that prints a report, you will notice that the macro stops working as soon as the Print dialog box opens. This is because whenever you print anything from TeleMagic, the dialog box you see is the standard Windows Print dialog box, and it does not understand TeleMagic commands. Similarly, many message boxes and warning boxes are called with Windows commands, and their appearance will cause your function key to stop in mid-execution. When creating function keys, make a note of any places where Windows features interrupt the process. You will have to execute these steps manually, and may need to create a second function key to continue the process after the interruption.

**WARNING!**

If you are using Windows' Macro Recorder function, or a third-party program that assigns events to keys, make sure you do not assign a function key within TeleMagic that conflicts with one set up elsewhere. The results of this can be unpredictable.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_To_Assign_a_Function_Key)<<1} To Assign a Function Key:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Directory_Settings_for_Function_Keys)<<1} Directory Settings for Function Keys

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Function Key Preferences: Assign a Function Key

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ï¿½ )<<1}

1. In TeleMagic, type out exactly the keystrokes of the process you want to automate. TeleMagic cannot follow the actions of a mouse, so you must use keystrokes (commonly, the ALT key and another key pressed at the same time) to navigate and to perform the function. For example, to get to the To-Do dialog box, you would key in "alt+v", then "t". Make careful note of every keystroke you use as you do this.
2. From the **Options** menu, select **Preferences**.

   The Preferences screen will open.
3. Click the **Function Keys** tab.

   The Function Key Preferences screen will open, displaying the current function key definitions.

   You will see the two sample function keys installed with TeleMagic.
4. Click **Add**.

   The Function Key Properties dialog box will open with a list of the available key combinations.
5. Select the key combination you want from the `Key Assignment` drop-down list.
6. Enter a description for the key's intended function in the `Description:` field.
7. From the radio buttons, select whether the function key should be **literal** based or **expression** based.
   - Literal function keys are used when your function key only contains keystrokes. Select the `Literal` radio button and type the keystrokes needed for the function key in the text box.

     **Example:** If you wanted to create a function key that will open the Goto dialog box and find a record with "JRC" in the Sales Rep field, you would create the following literal function key:

     {ALT+G}{TAB}{TAB}SJRC{ALT+O}
   - Expression function keys are used when your function key contains TeleMagic variables and functions. To create a function key that uses an expression, select the `Expression` radio button. The Expression Builder will open. (If you want to edit an expression later, use the **Expression** button to launch the Expression Builder. See the topic Expression Builder for help with creating an

expression. See Sample Function Key Expressions for some examples of function key expressions.) Your expression will display in the text field.

**Example:** If you wanted to create a function key that will open the Goto dialog box and find a record with the current user's User ID in the Sales Rep field, the use of a variable would be required to analyze the current User ID. This will require an expression instead of a literal. For example:

"{ALT+G}"+"{TAB}"+"{TAB}"+"S"+cUserID+"{ALT+O}"

8. When you are satisfied with the expression and the key assignment, choose **Save**. Your new key assignment will be added to the list.

**or** If you do not want to save the assignment, select **Cancel**.

9. Close the function key assignments box by clicking **Close**.

   Your function keys will be available immediately.

10. Test that the function key produces the desired results by executing it using the key combination assigned in step 5.

   Once you have created a function key, you may either use it directly from the keyboard, pressing the assigned key combination whenever necessary, or you may attach the function key to a button on your toolbar, thus eliminating the need to remember sets of keystrokes.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_a_Button_to_Run_a_Function_Key)<<1} Adding a Button to the Toolbar to Run a Function Key

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Function Key Preferences: Sample Function Key Expressions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½Note_for_Step_8_Writing_Expressions)<<1}

This option is accessed from the Function Keys screen.

Use the examples to create function keys that will perform common tasks quickly and efficiently.

Perform a rebuild of the current database:

**"{alt+f}"+"r"+"{alt+o}"**

Perform a rebuild of all databases:

**"{alt+f}"+"r"+"{alt+b}"+“{alt+d}"+"{alt+o}"+"{alt+o}"**

Prepare a report of today’s scheduled phone calls for printing:

**"{alt+r}"+"a"+"d"+"t"+replicate("{tab}",13)+"Call"+"{alt+p}"**

For more expressions, see the Common Function Key Expressions section of the Expression Builder.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Function_Key_Setup)<<1} Function Key Setup

# System Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Only supervisor users have access to system preferences.

System Settings allow you to create installation specific settings that will be applied to all users.

## To Set System Preferences

1. From the **Options** menu, select **Preferences**.
2. From the Preferences screen, click the **System** tab.

   The System Preferences screen will display.
3. Follow the guidelines below for each preference set on the screen.

   System ID
   Default Pager #
   Date Format
   Display Century on Date
   Downtime:
   Disable Login
   Century Rollover
   Set Automation Server Passwords

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# System Preferences: System ID

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the System Preferences screen.

The System ID is how TeleMagic tracks the source of a record in synchronization. It is generated automatically upon installation, and normally does not need modification.

If you will be using Data Synchronization to synchronize your sites, this System ID must be unique for all installations. When you install Data Synchronization Server, this option will not be accessible.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_System_Preferences_Default_Pager)<<1} Default Pager #
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# System Preferences: Default Pager #

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the System Preferences screen.

If all or most users in your system use the same paging carrier, you can enter a carrier phone number which will be offered as a default when a user sets up Wireless Messaging. Having this default established can save time and repetition in data entry. It can be edited on an individual basis for any users who have a different carrier number.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Date_Format)<<1} Date Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_with_TeleMagic)<<1} Wireless Messaging with TeleMagicWIRE_Wireless_Messaging_with_TeleMagic

# System Preferences: Date Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the System Preferences screen.

Select the date format in use by users in your system. Any date fields in this installation will appear using the selected format, as will dates in notepad stamping. To select a date format, use the Date Format list box. MM, DD, and YY stand respectively for numeric Month, numeric Day, and numeric Year.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Display_Century_on_Date)<<1} Display Century on Date

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## System Preferences: Display Century on Date

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the System Preferences screen.

This check box will cause date fields to be formatted to display the century. This option is selected by default. It is highly recommended that you leave this marked to avoid confusion with dates after the year 2000.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Downtime)<<1} Downtime

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## System Preferences: Downtime

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_System_Preferences_Downtime_Notes)<<1}

This option is accessed from the System Preferences screen.

Downtime allows you to set a regular time when users will not be able to access TeleMagic. This is generally used during periods of routine system maintenance. You can enter a beginning and ending downtime in these fields. No users will be able to log into TeleMagic during this time period. Any users already in the program will be given a 5 minute, then a 1 minute warning that they must exit TeleMagic. It is recommended that you set a downtime during your regularly scheduled rebuild and backup to avoid problems with users in the system when files are being accessed. Enter the time in 24-hour clock format.

Precisely when users are asked to leave the program depends on the time reported by their internal clocks. Also, TeleMagic external programs, such as TeleMagic Internet Mail and the Alarm application, require some time to close all open tables after the last user has logged off TeleMagic. For this reason, it is recommended that you wait at least 5 minutes after the specified downtime before beginning any maintenance.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Disable_Login)<<1} Disable Login

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# System Preferences: Disable Login

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_System_Preferences_Disable_Login_Notes)<< 1}

This option is accessed from the System Preferences screen.

This check box forces all other users out of TeleMagic. This can be used if you need to perform system maintenance, such as rebuild. When this is marked, non-supervisor users will not be able to log into TeleMagic. (Supervisor users may log in by entering their user login information using command line parameters. They will be given a warning that login has been disabled, notified of the user who initiated it, and given the choice of continuing or aborting.) Users currently in the program will receive two warnings to exit TeleMagic, at 5 minutes before and 1 minute before. Any users (with the exception of the user who selected this option) still in TeleMagic at the end of the 5 minutes will be automatically exited from the program. Login will be disabled until the user who marked this check box unmarks it.

External programs, such as TeleMagic Internet Mail and the Alarm application, will take some time to close any tables they may have open. For this reason, you should wait at least 5 minutes after login has been disabled before conducting any maintenance.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Century_Rollover)<<1} Century Rollover

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# System Preferences: Century Rollover

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the System Preferences screen.

Enter the year in two-digit format that is to be read as the last year in the twentieth century. For example, if you choose “95” as the century rollover, whenever “95” is entered as the year, it will be stored as “1995.” In this example, if “94” were entered as the year, it would be recorded as “2094.”

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Set_Automation_Server_Passwords)<<1} Set Automation Server Passwords

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# System Preferences: Set Automation Server Passwords

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the System Preferences screen.

You are able to set passwords to restrict use of the TeleMagic Automation Server. If you want to change the password at the Automation Server, you are required to know the password in order to access the program. If, for any reason, you do not have the password, you can enter a new one at this screen. There are two types of Server passwords: a Master password and an Options password. When you first access the Automation Server and are prompted for a password, if you enter the Options password at the prompt, anyone who later tries to access any of the other Automation Server screens will again be prompted for the password. If you enter the Master password, you (and any other users) will have complete access to all areas of the Automation Server during that work session without being prompted for a password again.

Click the **Master Password** or **Options Password** button to open a dialog box where you can type in the new password(s). If you are setting both passwords, make sure you use a different password for each.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Setting_The_TeleMagic_Enterprise_Automation_Server_Password)<<1} Setting The Automation Server Password

# User Preferences (User Setup)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

If you are a supervisor user, you will be able to use User Preferences to add new users to TeleMagic and edit existing ones. If you are not a supervisor user, you will be able to access User Preferences to change your own settings.

Adding users and maintaining the list of users is documented in detail in the *System Administrator Guide*. Editing your own settings is discussed below.

## To Set User Preferences

1. From the **Options** menu, select **Preferences**.
2. From the Preferences screen, click the **Users** tab.

   The User Preferences screen will display.
3. Follow the guidelines below for each preference set on the screen.

   The following users are installed (user list)
   Pager ID
   Pager #
   E-mail Address

## User Preferences: The following users are installed (User List)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This is a list of all users in this TeleMagic installation, sorted in alphabetical order by user name.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_ID)<<1} User ID

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## User Preferences: User ID

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

The User ID appears to the right of the User Name listed in `The following users are installed`. When you click **Properties** to edit a highlighted user, the User ID will appear in this field, but it cannot be changed.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Name)<<1} User Name

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## User Preferences: User Name

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

The User Name appears in the listing `The following users are installed`. When you click **Properties** to edit a highlighted user, the User Name will appear in this field. Enter any changes to the User Name, then click **OK** to save changes to the user.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Pager_ID)<<1} Pager ID

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## User Preferences: Pager ID

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

The `Details` group shows the Pager ID of the highlighted user. In addition, when you click **Properties** to edit a highlighted user, the Pager ID will appear in the `Pager ID` field. Click **OK** to save changes to the user's Pager ID.

The Pager ID is used with the Wireless Messaging system in TeleMagic to send messages to this user.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Pager)<<1} Pager #
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## User Preferences: Pager #

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

The `Details` group shows the Pager Number of the highlighted user. In addition, when you click **Properties** to edit a highlighted user, the Pager Number will appear in this field. If you will be using the Wireless Messaging system in TeleMagic and you will be sending messages to this User, enter the user's pager number in this field.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_E_mail_Address)<<1} E-mail Address

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# User Preferences: E-mail Address

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

The `Details` group shows the E-mail Address of the highlighted user. In addition, when you click **Properties** to edit a highlighted user, the E-mail Address will appear in this field. If this field contains an e-mail address, the user will appear in the Internet address book in TeleMagic Internet Mail.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Change_Password)<<1} Change Password
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# User Preferences: Change Password

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

When you click **Properties** to edit a highlighted user, this button becomes available. Click it to open the change password dialog box, where you can add or modify a password for this user. (You can also change your password from the **Options** menu.)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_User_Setup_Preferences)<<1} User Preferences (User Setup)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Toolbar Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½Prefsx_Toolbar_Configuration_Notes)<<1}

The TeleMagic Toolbars are fully customizable. All menu commands have been allocated buttons that you can place on the toolbars in any order you want. You can also create user-defined tools for the System Toolbar, linked either to external programs or to function key expressions. Feel free to experiment with these toolbars, since there is a Default option that allows you to return to the default toolbar at any time.

## To Open Toolbar Preferences:

1. From the **Options** menu, select **Preferences**.
2. From the Preferences Screen, click the **Toolbar** tab.

   The Toolbar Preferences screen will display.
3. From the `Configure Toolbar for` drop-down list, select **System** to configure your TeleMagic System Toolbar.

**or** Select **Contact Manager (Primary)** to configure your Primary Contact Manager Toolbar.

**or** Select **Contact Manager (Secondary)** to configure your Secondary Contact Manager Toolbar.

4. Use the following guidelines when editing your toolbar:

   If the menu commands that you use most often are not represented by buttons on the default toolbar, you can add them from the Toolbar Preferences screen. See: Adding Buttons for Menu Items

   If you want to access function keys by clicking a toolbar button, see: Adding a Button to Run a Function Key

   If there are external programs that you want to launch directly from the toolbar, see: Adding a Button to Launch an External Program

# Toolbar Preferences: Adding Buttons for Menu Items

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

## To Add a Pre-defined Button to the Toolbar:

1. From the **Options** menu, select **Preferences**.

   The Preferences screen will open.

2. From the Preferences Screen, click the **Toolbar** tab.

   The Toolbar Preferences screen will open.

   The bank of all menu-related toolbar buttons available is in a box on the left, labeled `Available Toolbar Options`. Toolbar buttons already on the toolbar appear in the box on the right, labeled `Selected Options`. The function of each button is written in a short phrase to the right of the button itself.

3. Customize your toolbar using the following guidelines:

   - Add a tool by highlighting the descriptive phrase from the choices in the left box, then click **Add**.
   - Rearrange the buttons on the toolbar you are currently using by clicking and dragging them to new positions within the Selected Options box on the right. You can also use the small buttons, located on the left edge of this box, to drag the menu items into position.
   - Remove tools currently on the toolbar by highlighting the tool's descriptive phrase from the box on the right and clicking **Remove**.
   - If you want to return to the TeleMagic default toolbar, click **Default** on the Toolbar Preferences screen.

   **WARNING!**
   If you reset the toolbar, any customizations you have made will be lost.

4. To save all changes made to the toolbar and exit, click **OK**. You will not be able to save a blank toolbar.

**or** To exit without saving changes, click **Cancel**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_a_Button_to_Run_a_Function_Key)<<1} Adding a Button to Run a Function Key

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_a_Button_to_Launch_an_External_Program)<<1} Adding a Button to Launch an External Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|

______154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1}
Setting Preferences

# Toolbar Preferences: Adding a Button to Run a Function Key

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½Prefsx_Toolbar_Configuration_Adding_a_Button_to_Run_a_Function_Key)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

## To Add a Function Key to Your Toolbar:

1. If you have not done so already, create the function key you want to attach to a toolbar button. (See Function Key Setup for details on how to do this.)
2. From the **Options** menu, select **Preferences**.
3. Click the **Toolbar** tab.

   The Toolbar Preferences screen will open.
4. From the `Configure tools for` drop-down list, select the System Toolbar.

   All available menu-related toolbar buttons are listed in the `Available Toolbar Options` box on the left. Tools already on the toolbar appear in the `Selected Options` box on the right.
5. In the list of tools in the `Available Toolbar Options` box is one called “user-defined.” Highlight this one and click **Add**. The User-Defined Toolbar dialog box will open.
6. Highlight the description of what the function key does from the box below. In the `Description` field, write a couple of words to remind you of what the button does. These words will appear next to the icon in the `Selected Options` box, as well as in the ToolTip when the mouse pointer passes over this tool on the toolbar.
7. In the `Icon` field, enter the path to the bitmap that will be placed on the Toolbar button, or click the ellipsis (…) button on the right to search for it.
8. Click **OK**.

   You will return to the Toolbar Preferences dialog box.
9. Make any other needed changes to the toolbar using the following guidelines:
   - Rearrange the buttons on the toolbar by simply clicking and dragging them to new positions.
   - Add separators between tools by highlighting the separator icon and clicking **Add**, then dragging it to the desired position in the `Selected Options` list. Remove a separator by highlighting the separator and clicking **Remove**.

- Remove tools by highlighting them and clicking **Remove**.
- If you want to return to the TeleMagic default toolbar, click **Default** on the Toolbar Preferences screen.

**WARNING!**
If you reset the toolbar with **Default**, any customizations to it that you have made will be lost.

10. Click **OK**.

    The Toolbar Preferences screen will close. Your new button will appear on the System Toolbar. To use the function key, click its button on the toolbar.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_Buttons_for_Menu_Items)<<1} Adding Buttons for Menu Items

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_a_Button_to_Launch_an_External_Program)<<1} Adding a Button to Launch an External Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1}Setting Preferences

# Toolbar Preferences: Adding a Button to Launch an External Program

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

## To Set up a Tool that Launches an External Program From Your Toolbar:

1. From the **Options** menu, select **Preferences**.

2. Click the **Toolbar** tab.

   The Toolbar Preferences page will open.

3. From the `Configure tools for` drop-down list, select the System Toolbar.

   All available menu-related toolbar buttons are listed in the `Available Toolbar Options` box on the left. Tools already on the toolbar appear in the `Selected Options` box on the right.

4. In the list of tools in the `Available Toolbar Options` box is one called “user-defined.” Highlight this one and click **Add**. The User-Defined Toolbar dialog box will open.

5. In the `Description` field, write a couple of words to remind you of what the button does. These words will appear next to the icon in the `Selected Options` box, as well as in the ToolTip when the mouse pointer passes over this tool on the toolbar.

6. In the `Icon` field, enter the path to the bitmap that will be placed on the Toolbar button, or click the ellipsis (…) button on the right to search for it.

7. Choose the `External Program` radio button.

   The External Program dialog box will open.

8. In the **Filename** field, enter the path and executable file name for the external program you want to run.

**or** Click on the ellipsis button to browse for the file from a Windows Open dialog box.

9. Type any command line parameters that are required when opening the program in the `Parameter:` field.

   **Example:** If your external program requires a password, you could enter that password as a parameter in this field. See the external program’s documentation for details on how to write this parameter.

10. When finished, click **OK**.

    You will return to the User Defined Toolbar dialog box.

11. Click **OK**.

    The User Defined Toolbar dialog box will close. Your new button will appear on the System Toolbar. To launch the external program, click its button on the toolbar.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_Buttons_for_Menu_Items)<<1} Adding Buttons for Menu Items

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Adding_a_Button_to_Run_a_Function_Key)<<1} Adding a Button to Run a Function Key

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Wireless Messaging Preferences allow you to specify the settings for receiving and/or sending messages. For this, TeleMagic needs to know information concerning your modem and your paging carrier.

**WARNING**

There are a number of precautions of which you should be aware of before setting up Wireless Messaging. Review the heading Before Setup before proceeding.

## To Set Wireless Messaging Preferences:

1. From the **Options** menu, select **Preferences**.
2. Click the **Wireless Messaging** tab.

   The Wireless Messaging Preferences screen will display.

3. Follow the guidelines below for each preference set on the screen.

   Pager ID Field
   Pager # Field
   Modem to Use
   Baud Rate
   Packet Size
   # of Retries
   Notify On Completion
   Paste Current Contact Info
   Monitor Transmission
   Activity/ToDo - Paste Comments
   Notify On Failure
   Use Dialer Prefix
   Modem Speaker On

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_with_TeleMagic)<<1} Wireless Messaging with TeleMagic

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Pager ID Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

The `Pager ID:` field should contain the unique ID (Pager Personal Identification Number or PIN) of your pager.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Pager_Field)<<1} Pager # Field

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Pager # Field

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

In the `Pager #:` field, enter the number TeleMagic needs to dial when sending you a wireless message (the carrier phone number).

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Modem_To_Use)<<1} Modem To Use
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Modem to Use

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

When sending wireless messages, **TeleMagic** needs to know the exact type of modem you are using. Use the drop down list in the `Modem To Use:` field to select the make and model of the modem at your workstation. Most modems use Hayes-compatible commands. If you do not know the exact make and model of your modem, or if it is not represented on the drop-down list, you can try using one of the `Hayes Compatible` options.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Baud_Rate_Messaging)<<1} Baud Rate

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Baud Rate

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

The `Baud Rate:` is the baud rate which can be accepted by your paging carrier; *not* the baud rate at which your modem is capable of sending information. Paging carriers will generally accept information at a much lower rate than your modem is capable of sending. This field defaults to 300. Exercise caution before changing this setting.

If you know the baud rate your pager can accommodate, select it from the drop-down list; otherwise accept the default settings. Most of the time, it will not cause a problem if you select a baud rate that is lower than your paging carrier can accommodate. In some circumstances, however, the paging carrier will only connect at a specific baud rate. If you have a problem connecting once you have set up wireless messaging, you may need to adjust your baud rate.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Packet_Size)<<1} Packet Size

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Wireless Messaging Preferences: Packet Size

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Messages are sent out in packets of information. Paging carriers have a limit to how much information can be sent at once. The `Packet Size:` field is used to tell TeleMagic the maximum amount of information that can be received by your carrier in one packet. If a message exceeds the maximum packet size, it will be broken up into two or more packets. Be careful not to enter a packet size larger than your paging carrier will accommodate. If you do so, when you are sent messages, information may be lost.

The default offered is the minimum packet size accepted by all paging carriers. Do not change this default unless you know that your paging carrier can accommodate a larger packet.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS__of_Retries)<<1} # of Retries

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: # of Retries

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

The `# of Retries:` field should contain a default for the number of times TeleMagic should attempt to send a message before declaring it failed. (This can be changed for individual messages, if necessary.)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Notify_On_Completion)<<1} Notify On Completion

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Notify On Completion

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Mark `Notify On Completion` if you want to be notified with a pop-up when the message is successfully sent. This option is available only for locally sent Messages.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Paste_Current_Contact_Info)<<1} Paste Current Contact Info

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Paste Current Contact Info

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Mark `Paste Current Contact Info` if you want to have standard contact information (Company, Contact, and address fields) pasted into the body of any messages attached to a contact. This information can be edited or deleted if necessary.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Monitor_Transmission)<<1} Monitor Transmission

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Monitor Transmission

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Mark `Monitor Transmission` if you want to be able to view a dialog box displaying the progress of the message transmission. This option is available only for locally sent Messages.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Activity_ToDo_Paste_Comments)<<1} Activity/To-Do—Paste Comments

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Activity/To-Do—Paste Comments

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Mark `Activity/To-Do Paste Comments` if you want to have the contents of the activity or To-Do `Comments` field pasted into messages sent from the Activity Manager. This information can be edited or deleted if necessary.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Notify_On_Failure)<<1} Notifiy On Failure

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Wireless Messaging Preferences: Notify On Failure

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Mark `Notify On Failure` if you want to be notified with a pop-up if a message fails to send after the specified number of retries. The message will include an error code indicating the reason for failure.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Use_Dialer_Prefix_Messaging)<<1} Use Dialer Prefix

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Use Dialer Prefix

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Wireless_Messaging_Preferences_Use_Dialer_Prefix_Notes)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

When setting up your Dialer Preferences, you enter the number you need to dial to get an outside line. This number, while necessary when making a phone call, may not be necessary when sending a wireless message. If you want TeleMagic to ignore this prefix when sending a wireless message, leave the `Use Dialer Prefix` check box unmarked. If you want to use the Dialer Prefix, mark this check box.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Modem_Speaker_On_Messaging)<<1} Modem Speaker On
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Wireless Messaging Preferences: Modem Speaker On

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Wireless Messaging Preferences screen.

Mark `Modem Speaker On` if you want to hear the initialization and dialing noises made by your modem when sending a message.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Wireless_Messaging_Preferences)<<1} Wireless Messaging Preferences

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Writing Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

These user preferences allow you to choose your word processor and the location of all word processing files, and to control whether you want notepads stamped with a date, time, and file name during a mail merge.

## To Set Writing Preferences

1. From the **Options** menu, select **Preferences**.
2. Click **Writing**.

   The Writing Preferences page will open.
3. Follow instructions below for each preference set on the screen.

   Word Processors
   Command Line
   Working Directory
   Include current date and Dear field in Quick Letter header
   Create Activity when Printing
   Stamp Notepad on Merge

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Word_Processing_in_TeleMagic)<<1} Word Processing in TeleMagic
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Writing Preferences: Word Processor

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Writing Preferences screen.

TeleMagic allows you to choose your default word processor from a list of compatible options, including WordPerfect for Windows versions 6.0, 7.0, and 8.0, Lotus Word Pro 97, Microsoft Word for Windows versions 2.0, 6.0, 7.0, or Word 97 and WordPad*. Select the word processor you want to use and check the appropriate checkbox.

If you are upgrading from a previous version of TeleMagic, please note that WordPerfect 5.2 is no longer supported.

*WordPad is not supported by TeleMagic Enterprise while running under Windows 98. It can be used in the Automation Server regardless of operating system.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Command_Line)<<1} Command Line

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Writing Preferences: Command Line

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Writing Preferences screen.

The `Command Line` field allows you to give TeleMagic the path to the executable file for the word processor you selected in the `Word Processor` field. When you select a word processor, TeleMagic will enter the program's executable file name—that is, the name of the program file which starts that word processor—into the `Command Line` field. Type the complete path to the storage location of the executable file, and adjust the file name if necessary. If you do not know the path, use the ellipsis button to locate the file using the Windows Open dialog box.

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Working_Directory)<<1} Working Directory

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Writing Preferences: Working directory

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Writing_Preferences_Choosing_the_Location_for_Word_Processing_Files_Notes)<<1}

This option is accessed from the Writing Preferences screen.

Use the `Working Directory` field to set a default directory that will contain your word processing documents. (This default can be edited for individual documents at the time a document is created.) This field will default to your TeleMagic user directory. Enter a different path if desired, or use the **Find…** button to select the path from a Windows Open dialog box.

Previously, each word processor had a different default directory for storing files. TeleMagic looked at the word processor being used to determine the path to the file, but did not store this as part of the document template. If you have entered a new default path in the `Working Directory` field, existing documents will not automatically be placed into this path. If a document does not contain a path, TeleMagic will continue to look in the default directory for the word processor currently in use. (The default sub-directory for Ami Pro is \DOCS\; the default sub-directory for Word for Windows is \LETTERS\; and the default sub-directory for WordPerfect is \WPDOCS\.)

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Writing_Preferences_Include_Date_and_Dear_Field_in_Quick_Letter)<<1} Include Date and Dear Field in Quick Letter

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Writing Preferences: Include Date and Dear Field in Quick Letter

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Writing Preferences screen. You must have a character field in the database named "Dear" to include the Dear field.

When adding a word processing document, you have the option of creating a quick letter. A quick letter allows you to bypass the Word Processor Form Letter selection box and the Add a Document dialog box by simply applying all of the new document defaults. (Click here for details.) This option will also automatically place the standard address into the letter. If your standard address does not already contain the date and a salutation line, or if you have no standard address and are using key fields for the address instead, the `Include current date and Dear field in Quick Letter header` check box will allow you to include the date and the contents of the Dear field (if one exists) with the address information. (If your standard address already contains this information, leave this check box unmarked.)

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Create_Activity_when_Printing)<<1} Create Activity when Printing

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

# Writing Preferences: Create Activity when Printing

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½PREFSX_Writing_Preferences_Create_Activity_when_Printing_Notes)<<1}

This option is accessed from the Writing Preferences screen.

Mark the `Create Activity When Printing` checkbox if you want to link to an activity when you print documents created through TeleMagic's word processing links. The activities will be given the type `Letter`, and will only appear in Browse in the Activity Manager. They will also be added to the contact's activity list. Additionally, the activities will be used to track the history of documents printed for a contact. Documents linked to a contact can be accessed from the View linked documents button ( ● ) on the Contact Manager toolbar.

## Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Stamp_Notepad_on_Merge)<<1} Stamp Notepad on Merge
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Writing Preferences: Stamp Notepad on Merge

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

This option is accessed from the Writing Preferences screen.

Check this box if you want to place a date, time, and file name stamp into the notepads of contacts included in a mail merge. (This will use the Notepad Key Field. See Key Fields for more information.)

### Continue...

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## When Goto is based on the e-mail address, look for contact in:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Preferencesï¿½ ï¿½ ï¿½ )<<1}

Use the radio buttons to select what TeleMagic should do when searching for a record based on an e-mail address:

- If `Current Database` is selected, TeleMagic will search every record in the current database for the e-mail address you are looking for. If the record is found, TeleMagic will display the record; otherwise, TeleMagic will display a record browse window so that you can manually search for the record.

- If `All Databases` is selected, TeleMagic will perform an exhaustive search for the e-mail address. TeleMagic will first search the current database, and—if the record is not found in the current database—TeleMagic will automatically continue its search in each and every database in the entire installation until the record is found, or until all databases have been searched. The current database in use will remain in view throughout the search; however, TeleMagic will inform you as it opens and searches through each database. Note that if you have a lot of records and several databases in your installation, the search may take a few minutes to complete.

- If the record is found, TeleMagic will open the database where the record resides and will subsequently display the record found during the search.
- If the record is not found, TeleMagic will display the message **Record not found.**

- If `Current Database, then prompt for All` is selected, TeleMagic will search the current database for the record. If the record is not found in the current database, TeleMagic will then ask you if you want to search All Databases for the record.

- If you answer **Yes**, TeleMagic will search all databases for the record you want to find.
- If you answer **No**, TeleMagic will display a record browse window so that you can manually search for the record.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_E_mail_Setup)<<1} E-mail Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½PREFS_Setting_Preferences)<<1} Setting Preferences

## Note for Step 2

If you want to use the keyboard to cycle through the preferences screen, use the TAB key to change to the desired preferences tab.

## Note for Step 6

Selecting **OK** or **Cancel** will not affect preferences that you saved when you moved between topics, as detailed in step 5.

## Note for the Activity Preference: Location of Activity Files

If you locate your activity files on your local drive, they will not be rebuilt by a standard network rebuild, unless that rebuild is run from your local workstation. (The same is true for a network backup.)

## Note for the Activity Preference: Default Description to Record Descriptor when Linking

This option will only apply to activities (not To-Dos). If you unlink an activity, the description will be blanked out.

## Note for the Activity Preference: Show Time in Blocks Of

Consider your usual activity duration when setting your time block. For example, if you regularly schedule a series of activities with a 5-minute duration while showing your calendar in 60-minute time blocks, you will end up with 12 activities in the same time slot. On the other hand, if you have your calendar set to 10-minute time slots and usually schedule 60-minute activities, each activity will span 6 slots. It is recommended that you estimate your average activity duration and set your time blocks accordingly.

## Note for the Activity Preference: Default Activity Duration

When completing this setting, you should think about the kinds of activities you most often schedule. If most of your activities are for meetings that last an hour on average, set your default duration to 60 minutes. If most of your activities are for phone calls that last an average of 15 minutes, set 15 minutes as your default duration.

## Notes for the Activity Preference: New Alarm/Snooze Interval

If you have your alarm check too frequently, it may slow down your computer slightly (depending on your system). Conversely, if you have this option set too high, you may miss important alarms. For example, if you have this option set to every half-hour, and if the check is performed at 4:00, it will not be performed again until 4:30. You will not receive notification for any alarms occurring after 4:00 until 4:30, which may be too late. Use discretion with this setting and consider compensating for the time difference using the `Lead Time` feature when creating activities.

If you set this setting to zero, and unmark the `New Mail Notification` option in E-mail preferences, TeleMagic will not open the alarm program.

## Note for step 2

If you do not have a contact database open, **Contact** preferences will be disabled.

## Note for Default views/pages

The `Default Views` and `Pages` options are database- and user-specific. If you routinely use multiple databases, you must open each database and make these settings separately.

## Note for the Contact Preference: Default Pages

There is a Key Field that lets you set a default page for each record. If a record has a default page established, it will override this setting. (See Setting a Controlling Page for more information.)

# Notes for the Contact Preference: Startup Database

You can also select a controlling level for each database in Database preferences. This allows you to specify what level of a database should appear when the database is opened. If you set a controlling level for your startup database, you can have TeleMagic open directly to a specified level of the selected database. See Controlling Level for more information.

If you have **Save Settings on Exit** selected on the **Options** menu, this will override your startup Database selection. If you are using the Save Settings feature, you do not need to set this preference.

## Note for Database Preferences

If you do not have a contact database open, Database preferences will be disabled.

## Note for the Database Preference: Calc Upper Levels on Save

If you do not select this option, the upper-level calculations will be performed during rebuild if you have the `Calculated Fields` option selected in the Database Files dialog box. See Rebuilding Contact Database Files topic for instructions.

## Note for Toolbar Configuration

If the current toolbar was created in a higher monitor resolution than you are currently using, the entire toolbar may not fit on your screen. In this case, you will receive a warning that any tools that do not fit will be dropped from the toolbar. You may only create a toolbar that will fit in your current resolution.

## Notes for Adding a Toolbar Button to Run a Function Key

You can modify the appearance of tools to exactly fit your needs. The face of each of the user-definable buttons is stored in a BMP (bitmap) file, located in the TeleMagic \TOOLS\ directory. These files (named 1USERDEF.BMP, 2USERDEF.BMP, 3USERDEF.BMP, and 4USERDEF.BMP) can be changed in a graphics program, such as Paintbrush or Paint, so that they graphically represent whatever function they serve. You may edit the pictures at any time; however, the names of these files must remain the same so that TeleMagic will recognize them. (If you edit a bitmap while the Toolbar Configuration option screen is open, the change will not be reflected until you close then re-open this screen.) You can also create new bitmaps of your own. When you create your own bitmaps to be used as buttons, the bitmaps must be placed in the \TOOLS\ directory. They can be named whatever you choose, but long file names are not supported.

If you need to edit the function performed by the custom button at a later time, open Toolbar Configuration and double-click the tool on the toolbar. The Select Tool Type dialog box will open where you can adjust the assignment.

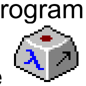
## Notes for Setting up a Toolbar Button that Launches an External Program

You can modify the appearance of tools to exactly fit your needs. The face of each of the user-definable buttons is stored in a BMP (bitmap) file, located in the TeleMagic \TOOLS\ directory. These files (named 1USERDEF.BMP, 2USERDEF.BMP, 3USERDEF.BMP, and 4USERDEF.BMP) can be changed in a graphics program, such as Paintbrush or Paint, so that they graphically represent whatever function they serve. You may edit the pictures at any time; however, the names of these files must remain the same so that TeleMagic will recognize them. (If you edit a bitmap while the Toolbar Configuration option screen is open, the change will not be reflected until you close then re-open this screen.)You can also create new bitmaps of your own. When you create your own bitmaps to be used as buttons, the bitmaps must be placed in the \TOOLS\ directory. They can be named whatever you choose, but long file names are not supported.

If you need to edit the path or file name for the external program at a later time, open Toolbar Configuration and double-click the tool on the toolbar. The External Program dialog box will open where you can adjust the assignment.

## Notes for the Database Preference: Currency Symbol

This setting provides the default currency setting within TeleMagic. It does not override any settings that may have been made for individual fields. Also, the currency display for TeleMagic is separate from, and unaffected by, the currency settings for Windows (set in the Control Panel, Regional Settings, Currency).

If the currency symbol you want to use does not appear on your keyboard, you can use the Windows Character Map in the Windows Accessories Program Group or Folder to find the keyboard command that will generate the symbol. Double-click the  icon in the Accessories group or folder to open the Character Map program. Use the list of fonts to locate the currency symbol you want to use. At the lower right-hand corner of the Character Map dialog box you will see a line that says `Keystroke:`, then the keystroke needed to generate that character. (For example, the keystroke for the £ character in Times New Roman font is ALT+0163.) In the `Currency symbol` field in TeleMagic, type the keystrokes needed to generate the desired currency symbol. (Following the above example, hold down the ALT key and type 0163: £ will appear in the `Currency symbol` field.)

## Notes for the Database Preference: Standard Address

To place the city, state, and ZIP code all on the same line, you would use a format similar to the following:

**trim(contact1.city) ", " contact1.state " " contact1.zip**

(Use the field names in your database in place of the contact1.city, contact1.state, and contact1.zip examples.)

You must enclose spaces which you want to appear in the actual address with quotation marks.

## Note for step 2

If you do not have a contact database open, the Key Fields tab will be disabled.

## Note for step 6

If you do not see any fields available in your Phone Key Fields, you have not defined any fields in your database as Phone or Fax type fields. These type fields can usually be distinguished by having a phone icon or a fax icon beside them on the contact screen. See Creating and Defining Fields for more information.

## Note for step 7

Selecting the Contact Key Fields for one level does not select them automatically for the other levels. You need to repeat the procedure separately for each level of each database.

## Notes for Using the Fax Stamp

When sending a fax, you have the option of stamping your Notepad Key Field with this same information. If you choose to do this, and if you have a different memo field selected as your Fax Stamp Key Field, both memo fields will be stamped. Note also that if you have the same field selected for the Notepad Key Field and the Fax Stamp Key Field, AND you have the Notepad Stamp box checked in Fax Preferences, you will receive two stamps into the same notepad.

It is recommended that you perform a search and replace to unmark this field prior to faxing, as any logical fields previously turned on will not be unmarked for failed faxes. See the Group Replace topic.

For a quick view or a report on contacts with failed faxes, you can create a filter that searches for an X as the first character in the field selected as your Fax Stamp Key Field. See the Creating Filters topic for more information on creating filters.

## Notes for Setting a Controlling Page

Rather than manually entering page names into the field, you can use a calculated field to further automate this process. You can create a calculation that populates the field based on variable information; for instance, you could select a page based on the user logged in, or on information from other fields, or one based on the contents of a field containing account status.

There is also a Contact Preference for setting a default page for a level. When you first open a database level, it will automatically open to the default page for the level unless the record has a different default page established.

The page must be in the current view. If the page is not in the current view, this setting will be ignored.

## Note for Setting up a Record Descriptor

If you have changed your record descriptor and want to return to using the Company and Contact Key Fields, enter the word Default (with no quotation marks). The default descriptor will be used.

## Note for the Dialer Preference: Local Area Code

If you are located in North America, it is possible that implementation of the North American Numbering Plan means that you can no longer assume that every number in your area code is local, and every number outside of it is long distance. If this is the case in your area, see North American Numbering Plan for information on configuring your system to account for this.

## Note for the Dialer Preference: Dialer Prefix

If you often hear numbers being dialed before the outside line is ready (before the secondary dial tone), you can place more commas after the 9 for a longer wait time. If this still does not work, contact your telecommunications professional for more information.

## Notes for the Dialer Preference: Prefix for Local Call

If you have phone numbers (such as international numbers) which do not use the prefixes or require different prefixes, see the Prefix Override Character topic.

If you often hear numbers being dialed before the outside line is ready (before the secondary dial tone), you can place more commas after the 9 for a longer wait time. If this still does not work, contact your telecommunications professional for more information.

## Note for the Dialer Preference: Prefix for Long Distance Call

If you have already set up a general dialer prefix used to access an outside line in the `Dialer Prefix` field, you should not enter a prefix here. If you do so, the prefix will be dialed twice when placing calls.

## Note for the Dialer Preference: Dialer Suffix

If your telephone system requires an accounting code to be entered after a long distance number is dialed, it may be possible to have it as a dialer suffix. Contact your telecommunications professional for more information.

## Note for the Dialer Preference: Initially Bring up Call Notes

This check box will be unavailable if either the `Create Activity` or the `Insert Notes into Notepad` check box is unmarked. (If you are not creating an activity or stamping the notepad, you will not receive the Call Notes dialog box.)

## Note for the Dialer Preference: Prompt for Setting Recall

This check box will only be available if both the `Create Activity` and `Insert Notes into Notepad` check boxes are unmarked.

## Notes for the Directory Preference: Function Keys

Be aware when placing your function keys in the database directory that unless you have security rights to edit Database preferences, you will not be able to add or edit function keys.

*Global directory* refers to the directory where files common to all databases and users are located. It is called \TM4\COMMON by default.

## Note for the Directory Preference: List Boxes

Because list boxes in the Contact Manager are attached to fields, and are only accessible from the field, many list boxes themselves are database-specific. You will only be able to access a list box from the database in which it was created, regardless of the location the file is stored. (This does not apply to list boxes accessed in TeleMagic dialog boxes such as in the Activity Manager and Sales Forecasting.)

## Notes for the Directory Preference: Toolbar Configuration

In addition to being able to add or remove pre-defined tools from your toolbar, you can create your own tools to be used with function keys. If you are creating function keys and making them accessible from the toolbar, it is strongly recommended that you set your Toolbar Configuration directory setting to the same location as your Function Key directory setting.

Be aware when placing your toolbar configuration in the database directory that unless you have security rights to edit Database preferences, you will not be able to edit the toolbar.

The global directory referred to is the directory where TeleMagic is installed.

## Note for Data Entry Preferences

Unmarking `Force 'Tab' on Every field` is useful if your fields are formatted to the exact length of the data they will contain. For example, if a State field is formatted to contain two characters, with this option unmarked, as soon as you enter the state, your cursor will move to the next field. You should use caution in data entry with this option unmarked. If you continue typing data that is longer than the field length, it will be placed in the next field. It is recommended that you check the `Data Entry Bell` box if you unmark this option.

## Notes for the E-mail Preference: New Mail Notification

When a user writes an e-mail message, he or she has the option of sending a notification or not. If a user selects to send notification to another user who has this preference turned off, no notification will be sent. Additionally, if you have this turned off and have the `New Alarm/Snooze Interval` preference in Activity preferences set to zero, you will not receive e-mail notification of TeleMagic events, such as a failed fax.

If you unmark this option and set the Activity Preference `Snooze Minutes:` setting to zero, TeleMagic will not open the alarm program.

## Notes for the E-mail Preference: External E-mail Application

If you use an external e-mail application in place of the TeleMagic e-mail system, you will not be able to use any of TeleMagic's automatic e-mail notification features. For example, you will not be able to receive notification for failed faxes sent locally.

The parameter expression can be as simple as: "MYNAME MYPASSWORD", or it can be a complex dBase expression that resolves into a character string. Consult your e-mail documentation to see which, if any, parameters are required.

## Note for the Fax Preference: Use Local Faxmodem

You must configure your faxmodem before you can select this option. If you have not configured your modem, you will receive a pop-up message instructing you to click **Configure Faxmodem(s)**. (See the Configure Faxmodem(s) topic for more information.)

## Note for Configuring Faxmodem(s)

You will probably not need to adjust this setting. This option is provided for troubleshooting in the event that your faxmodem is not completely compatible with a supported class.

# Notes for Fax Sending Preferences

To avoid overloading your Activity Manager, activities created in a merge (either a mail merge or a fax merge) will not appear on your schedule; they will only appear in Browse view.

The notepad stamping features will only be applicable if you have established your Notepad key field. (See the Contact Key Fields topic.)

## Notes for Function Key Setup

Depending on your Directory Setup Preference settings, function keys may be stored in either your user directory, the database directories, or the common directory (\TM4\COMMON by default).

TeleMagic comes with two sample function keys designed to stamp information in a contact's notepad. You can use these function keys as is, or use them simply as examples when learning how to create your own function keys. If you set your Directory preferences to Database Directory for the Function Keys, you may find that some contact databases have more pre-defined Function Keys than others; you can use these as an additional reference about what can be done with Function Keys.

## Note for Step 4

Some keyboards, especially older ones, will not generate keystrokes for the F11 and F12 keys that Windows will recognize. If this is the case, you will not be able to assign SHIFT or CTRL function keys with F11 or F12.

## Notes for Step 7

Expressions must be less than 254 characters long.

Do not use quotes in a literal unless they are part of the text.

When including keyboard commands into the expression, place the key in quotes: "X". If you want to use a key with more than one character in the description (e.g., ALT, ENTER, CTRL), you must place the key in quotes and braces; for example "{ALT}". If you must press two keys simultaneously, place both of them within the brackets separated by a plus sign; for example "{ALT+F}". Use "{TAB}" to navigate to an option on a dialog box that does not have a hot key. If you must tab several times to reach the option, rather than entering "{TAB}" multiple times, you can use the REPLICATE() command. Simply enter REPLICATE(), "{TAB}" (or any other keyboard command you want to repeat), a comma, and the number of times you want to tab. For example, REPLICATE("{TAB}", 3).

## Notes for the Local Fax ID

This option only applies to faxes that are sent locally. Faxes sent through the Server will use the ID of the server that processes them.

## Notes for the Fax Preference: Use Dialer Prefix

This option is only available if you have `Use Local Faxmodem` marked.

If you are not sure about this option, try leaving it blank initially. You can change it later if you have problems sending faxes.

## Notes for the System Preference: Disable Login

If the user who initiated the disabled login exits TeleMagic while this is activated, he or she can log back in with the User ID that was in use at the time this was selected. The user *must* log in by launching TeleMagic with the /U=***UserID*** command line parameter.

Remember that the Automation Server and Data Synchronization Server often need to access TeleMagic files. If you will be performing system maintenance, consider shutting down the Automation Server and Data Synchronization Server.

If users have shut down their computers without properly closing TeleMagic, or if their operating systems have locked up while TeleMagic was open, they may have left TeleMagic files open on the network. This forced logout is performed at the TeleMagic level, not the network level. (This allows you to shut down TeleMagic while continuing to work in other applications on the network.) In this case, files may continue to be unavailable for maintenance despite the logout.

## Notes for the System Preference: Downtime

If you need to access TeleMagic during a downtime, you must log in with your user information entered as command line parameters. (For example, **c:\tm4\programs\tm.exe /u=*user_ID* /pw=*password***) TeleMagic will verify that you are a supervisor user, then inform you that a downtime is in effect. You can then choose to continue or abort. If you open TeleMagic during a downtime, make sure that no other user has initiated a rebuild or you may encounter problems. (For more information on command line parameters, review the TeleMagic Command Line Parameters topic.)

Remember that the Automation Server and Data Synchronization Server have their own downtime settings. If you will be performing system maintenance during this period, it is recommended that you coordinate the downtimes of the different programs.

If users have shut down their computers without properly closing TeleMagic, or if their operating systems have locked up while TeleMagic was open, they may have left TeleMagic files open on the network. This downtime is performed at the TeleMagic level, not the network level. (This allows you to down TeleMagic while continuing to work in other applications on the network.) In this case, files may continue to be unavailable for maintenance despite the downtime.

## Note for the Wireless Messaging Preference: Pager #

If most users use the same paging carrier, your system administrator can establish a default `Pager #`. See the topic Setting Up Wireless Messaging for details.

## Note for the Wireless Messaging Preference: Use Dialer Prefix

If you are unsure about this setting, try leaving it unmarked initially. Edit the setting if necessary.

## Notes for Choosing the Location for Word Processing Files (Working Directory)

If you are on a network, and will be using the TeleMagic Automation Server to process faxes and word processing documents, do not enter a Working Directory path to your local (C:\) drive in this field. If a document is on your local drive, the Automation Server will not be able to access it from the network.

If you have upgraded from V1.5 or earlier, this field will appear empty for existing users. Leave this field empty if you want your files to continue to be placed in the original default path. (Once you make an entry in this field, you no longer have the option of deleting the contents and leaving it empty.) New users added after upgrading will be offered the default path of their user directory.

## Note for the Writing Preference: Create Activity when Printing

Although there will be a Letter type activity created for each document merged to a contact, these will not be displayed in your calendar. This is to prevent an overloading of one time slot in your Activity Manager when you perform a mail merge to a large number of contacts. Letter type activities can be viewed through the Activity Manager’s Browse and are available for reports.

## Note for the Writing Preference: Backward Compatible

If you have upgraded from TeleMagic Enterprise for Windows Version 2.0 or later, this box will be unavailable.

## Note for Step 1 (Assigning Function Keys)

You must first close any open dialog boxes that you may have opened with your keystrokes.

## Note for Step 7 (Writing Expressions)

You can use either double quotation marks or single in your expression, as long as you keep them consistent. Do not create an expression with both.

## Note on Custom Icons

The icon you choose must be stored in \TM4\TOOLS. You can create your own icons, but they must fit on the button. To fit on the button correctly, they must be no larger than 19X17 pixels. There are four examples available for use or modification: 1USERDEF.BMP, 2USERDEF.BMP, 3USERDEF.BMP, and 4USERDEF.BMP. Each has an associated mask file (e.g., 1USERDEF.MSK).

To create a mask file, simply make a copy of your graphic file and change the color of every object you would like transparent to white, and the color of every object you would like opaque to black.

## Note for Step 2

Permanent deletion occurs when the **Send deleted mail to Deleted Items folder** is not marked and the message is deleted from any folder, or if a message is deleted from the Deleted Items folder under any conditions.

## Note for Step 2

Not all mail applications can properly interpret rich text formatting. If your recipients notice unexpected characters in your messages, disable sending in rich text for those recipients experiencing difficulty.

## Note for Step 4

Selecting Calculate Lower Level on Save can significantly increase the time required to save each record.

# TeleMagic Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Report)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

There are three types of reports in TeleMagic, each with a different level of design complexity, and therefore, depth of information: standard reports, custom reports and quick lists.

*Standard* reports are designed to anticipate your reporting needs and to ease the task of printing professional-looking reports; their formats are included with TeleMagic. Most of the major areas of TeleMagic include standard reports. When you print a standard report, the design and layout have already been done for you. You can select from options that allow you to control information such as names of specific users, date ranges, contacts, and much more.

*Custom* reports allow you to design your own reports detailing practically any information in TeleMagic. You control completely what information is included, what calculations are made based on that information, and how the information is presented visually. With custom reports, you basically start with a blank page and use report generation tools to build a report. You can save some time in a custom report by using the quick report feature.

A *Quick List* has limited formatting options. If you simply need quick access to the data in one or more fields, a quick list is the easiest solution.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Standard_Reports)<<1} Standard Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Standard Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Standard reports are pre-formatted reports provided by TeleMagic. They are designed to give you quick access to contact, activity, and system information.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Before_you_Begin)<<1} Before you Begin
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Reports)<<1} TeleMagic Reports

## List of Standard Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Each standard report in TeleMagic is designed to provide specific information on data contained in an area of the program. The following summarizes the available reports and gives a quick synopsis of each report's information. Use this list as a quick reference guide whenever you need specific information on an area of TeleMagic.

| Type | Report | Description |
|---|---|---|
| Activity Manager | Day at a Time | Gives you a printout of your Day at a Time calendar page. |
| Activity Manager | Week at a Time | Gives you a printout of your Week at a Time calendar page. |
| Activity Manager | Month at a Time | Gives you a printout of your Month at a Time calendar page. |
| Activity Manager | Activity History | A productivity tracking report that gives statistical analysis of user performance activities. |
| Activity Manager | Daily Schedule | Produces a chronological list of pending activities in a specified time span. |
| Activity Manager | Pending Activities | Produces a complete list of all pending activities grouped by type and by its completion status – pending or late |
| Contact Manager | Address/Phone List | Produces a quick listing of contacts with their addresses and phone numbers. |
| Contact Manager | Contact List | Produces a list of contacts with addresses and phone numbers, as well as a history of activities and notepad entries related to the contact. |
| Contact Manager | List Box | A printout of the data contained in list boxes attached to fields in the Contact Manager. |
| Contact Manager | Envelopes | Prints envelopes for contact records based on a selection of standard envelope sizes. |
| Contact Manager | Address Labels | Prints address labels for contact records based on a selection of standard label |

| | | |
|---|---|---|
| | | sizes and types. |
| Contact Manager | Shipping Labels | Prints shipping labels for contact records based on a selection of standard label sizes and types. |
| Contact Manager | Rotary Cards | Prints rotary cards for contact records based on a selection of standard sizes. |
| Contact Manager | Name Tags | Prints name tags for contact records based on a selection of sizes and types. |
| Contact Manager | File Folder | Prints file folder tags for contact records. |
| Contact Manager | Index Card | Prints index cards with the names and addresses of contacts. |
| Contact Manager | Post Card | Prints post cards for contact records. |
| Fax Feature | Fax Reports | Generates details on queued and local faxes. |
| General | Database Structure | A system report designed to give you full Report details on all fields, filters, and indexes in your database. |
| General | Group Security Report | A system report detailing the security groups set up in TeleMagic, and listing the users belonging to each of those groups. |
| General | User Security Report | A system report detailing the security settings for a user. |
| General | System/Database | A system report designed to show the Preference Report database preference settings for each database, as well as the system preferences for the installation. |
| General | User Preference Report | A system report detailing all user preference settings for a specified user. |
| General | Error Report | A system report designed to report on any errors logged in TeleMagic. |
| Sales Forecasting | Sales Forecasting | Generate summaries and graphs of Sales Reports |

| | | |
|---|---|---|
| | | Forecasting information. |
| Branch Scripting | Branch Scripting Reports | Prints out full scripts or script outlines. |
| Resource Management | Resource List | Generates a list of resources created for use with the Activity Manager. |
| Resource Management | Resource Schedule | Generates a list of the schedules for any resource during a specified time span. Includes times the resource is and is not available, and times when the resource is being used by another user or group of users. |
| Rebuild | Rebuilding Data | Rebuild Report: A report on the results of a rebuild, including any errors encountered. |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Before_you_Begin)<<1} Before you Begin

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<<<1} Producing Custom Reports and Labels

# Before you Begin with Standard Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Before_You_Begin)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

When printing standard reports, TeleMagic has to know from which Contact Manager fields to pull certain information, such as company names and addresses. Make sure you have established your Contact Key Fields. If these Key Fields are not defined, you may receive a message stating that you are unable to print the report without your Key Fields when you attempt to print a report, or it may print without pertinent information. (See Key Field Preferences for instructions on establishing key fields.)

Additionally, you must have security rights to view the fields used in the reports before you can run them. If you do not have field level security rights within a database to the Key Fields included in the report, TeleMagic will not print the report. For more on field level security, see *To Add Database Security and Visibility Rules to a Security Group* in the *Security* chapter of the accompanying *System Administrator Guide*.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Contact_Reports)<<1} Contact Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_Envelopes_and_Labels)<<1} Printing Envelopes and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Feature_Reports)<<1} TeleMagic Feature Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

# Activity Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

TeleMagic's Activity Reports feature offers you several pre-formatted reports that give you an overview of your pending and/or completed activities, extended activities, and To-Dos. Activity Reports also allow you to chart all users' productivity.

Selecting **Activity Reports** from the **Reports** menu brings up the Activity Reports sub-menu.

All reports on this menu are based on information in the Activity Manager.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Schedule_Reports)<<1} Activity Schedule Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_History_Reports)<<1} Activity History Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Daily_Schedule_Report)<<1} Daily Schedule Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printg_a_Pending_Activity_Report)<<1} Pending Activity Report

# Activity Schedule Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

These reports give you the option of generating a report that shows your current schedule for a specified time range in either Day at a Time view, Week at a Time view, or Month at a Time view.

## To Set up a Day at a Time, Week at a Time, or Month at a Time Activity Report:

1. From the **Reports** menu, select **Activity Reports**.
2. Select **Day at a Time**.

**or** Select **Week at a Time**.

**or** Select **Month at a Time**.

The Activity Report dialog box will open.

The `Report format:` radio buttons and the title bar will reflect which report format you selected.

3. If you want to change your report format, choose the desired `Report format:` radio button.
4. Under `Include:` mark `Activities` if you want the report to include information about your activities; mark `To-Do's` if you want to include information about your To-Dos.
5. If you want to report on all pending activities and To-Dos, mark the `Due` check box. If you want to report on all completed activities and To-Dos, mark the `Completed` check box.
6. If necessary, in the `Date range:` fields, type the `From:` and `To:` dates you want for the report, or click the `From:` and `To:` Date Picker icons and select a date from the pop-up calendar.
7. If necessary, in the `Time range:` fields, type the `From:` and `To:` times you want for the report.
8. Use the `Priority:` check boxes to filter the report based on the priority assigned to the activities or To-Dos when they were created.
9. To print the report based on another user's schedule, select the user from the `User:` list box. You will be able to report on any users who have granted you full view rights to their schedules.

The `Resolution:` field will default to your `Show Time in Blocks of` setting in Activity Preferences.

10. To adjust the time blocks shown on the report, select a number (in minutes) from the `Resolution:` list box.

11. If you want to filter your report on the activity and To-Do type, enter a type in the `Type:` field. Only those activities and To-Dos of the specified type will be included in the report. (This option is not case sensitive.)

12. In the `Extended Activities:` section, select `Global` if you want global extended activities included in the report (those that appear on all users' schedules). Select `Personal` if you want to include any extended activities that appear on the schedule of the user selected in step 9. You may select one or none.

    If you are printing a Month at a Time report, the `Detail Page` option will become available. The Month at a Time report resembles the Month at a Time calendar page, with an icon for each activity type on a specific day and no activity descriptions. The `Detail Page` option allows you to include an additional page in the report detailing the activities scheduled on each day.

13. If you want to include activity details in a Month at a Time report, mark the `Detail Page` check box. When this is selected, the Month at a Time Report will be displayed. When you close the Month at a Time Report, the details will be displayed.

14. If you want to preview the report, click **View**. (See Page Preview for instructions on using the Page Preview window.)

15. When satisfied with your selections, click **Print**.

    The Print dialog box will appear.

16. Click **OK**.

    The report will print.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_History_Report)<<1} Activity History Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Daily_Schedule_Report)<<1} Daily Schedule Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Pending_Activity_Report)<<1} Pending Activity Report

# Page Preview

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. If you want to preview the report, at the report dialog box, click **View**.

   The Report Designer preview window will open, along with its associated toolbar.

2. Click anywhere on the page to toggle between full-page and zoom-in views. Select the zoom factor for the full-page view from the drop-down list on the toolbar. (This setting will not affect the zoom factor for the zoom-in view.

3. Use scroll bars to view another part of the page.

4. To return to full page view, click anywhere on the previewed page.

**or** Select a zoom factor from the drop-down list on the toolbar.

5. Click on the Next, Previous, First, and Last VCR buttons to move through the report.

6. To see a specific page, Click on the Go to Page button on the toolbar.

   The Go to Page dialog box will open.

7. Enter the desired page number in the text field, either by typing or using the spinner arrows, and click **OK**.

8. To print the report, click on the Print button on the toolbar.

9. When you have finished previewing the report, click on the Exit Preview button on the toolbar.

   The Page Preview window will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Layout_Tools)<<1} Layout Tools
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Saving_Reports_and_Exiting_the_Report_Generator)<<1} Saving Reports and Exiting the Report Generator
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

# Activity History Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Activity_History_Report)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½
ï¿½ )<<1}

This flexible, activity-based report is a valuable aid in tracking productivity, since it allows you to report on the number of activities being scheduled and completed for a single user, or for all users. It generates a statistical summary of each user’s performance.

## To Generate an Activity History Report:

1. From the **Reports** menu, select **Activity Reports**, **Activity History**.

   The Activity History Report dialog box will open.

2. Enter a title for the report in the `Report Title` field. This title will print at the top of every page. (You may leave this field blank if you want.)

3. Select the `All Activities` radio button if you want to report on all activities, whether completed or not.

**or** Select the `Pending Activities` radio button if you want to report on only those activities that have not been completed.

**or** Select the `Completed Activities` radio button if you want to report on only those activities that have been completed.

   If you are reporting on `All Activities` or `Pending Activities`, you can apply a filter on the activity due dates using the `Activities Due Between:` fields. If you are reporting on `Completed Activities`, this prompt will toggle to `Activities Completed Between`. This will allow you to filter on the activity completion dates.

4. In the `Start Date:` field enter the earliest due/completion date from which the report is to select activities. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

5. In the `End Date:` field enter the last due/completion date from which the report is to select activities. Clicking the Date Picker icon will bring up a calendar from which you can select a date.

6. Select the `Created by` radio button if you want to report on the individual(s) who created the activities. (For example, if you are printing a report based on your own User ID, selecting `Created` by will cause the report to include all activities that you actually added, whether you

kept them for yourself or assigned them to another user.)

**or** Select the `Assigned To` radio button if you want to report on the individual(s) to whom the activities were assigned. (For example, if you are printing a report based on your own User ID, selecting `Assigned To` will cause the report to include all activities that appear on your schedule, whether you created them yourself or another user created them for you.)

7. Select the `User Group` radio button if you want to report on all members of a user group.

**or** Leave the `Individual` radio button selected if you want to report on only one individual.

When `Individual` is selected, a list of all users in the system who have granted you view rights to their calendars is enabled. When `User Group` is selected, a list of user groups is enabled.

8. From the drop-down list, select the individual or user group on which you want to report.

9. If you want to include only activities that are linked to the current contact, select the `Current Contact Only` check box.

**or** If you want to include unlinked activities and those linked to contacts other than the current contact, unmark the `Current Contact Only` radio button.

10. Select the `All Types` radio button if you want to report on all activity types.

**or** Select the `Single Type` radio button if you want to report on a single type.

11. If you selected `Single Type` in step 10, choose the type from the drop-down list box. (The items in this list will be taken directly from the `Type` field's list box in the Activity Manager if one has been added. If the `Type` field does not have a list box, the list is filled with the following entries only: Blank Type, Call, and Meeting.)

12. Select the `All Status` radio button if you want to report on all activities, regardless of status.

**or** Select the `Single Status` radio button if you want to filter the report by status.

13. If you selected `Single Status` in step 12, choose the status on which you want to report from the list. (The items in this list will be taken directly from the `Status:` field's list box in the Activity Manager, if one has been added. If the `Status:` field does not have a list box, the list is filled with the following entries only: Blank Status, Completed, and Pending.)

The `Statistics` check box allows you to include a detailed statistical summary of the performance of every user to be included in the report. The statistical summary will provide a breakdown of the time spent by each individual on TeleMagic activities, and will show these statistics by activity status and activity type.

14. Mark the `Statistics` check box if you want to include statistics in the report. Leave it empty if you do not.

15. Mark the `Detail` check box if you want activity descriptions, due date and time, type, status, and linked contact information to be included in the report. Leave it empty if you do not.

16. Mark the `Comments` check box if you want activity comments to be included in the report. Leave it empty if you do not. (`Comment` will not be available unless you mark `Detail`.)

17. Mark the `Contact Info` check box if you want information concerning the related contact record for linked activities included in the report. Leave it empty if you do not.

    If you marked the `Contact Info` check box, the **Key Fields** button will become available.

18. To select what key field information you want included in the report, click **Key Fields**.

    The Contact Information dialog box will open.

    By default, the report will include information from the Contact, Company, and primary phone number fields.

19. Select the key fields using the check boxes to include the contact information you want included in the report.

20. Click **OK** when you have selected all necessary key fields.

    You will return to the Activity History Report dialog box.

21. Click **View** to see a preview of the report. (See Page Preview for instructions on using the Page Preview window.)

22. Click **Print** to print the report.

**or** If you do not want to print the report, click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Schedule_Reports)<<1} Activity Schedule Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Daily_Schedule_Report)<<1} Daily Schedule Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Pending_Activity_Report)<<1} Pending Activity Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Printing a Daily Schedule Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Daily Schedule Report is a quick printout of your scheduled pending activities for a given day or span of days. It differs from the Day at a Time report in that it only prints those time slots in which a pending activity is actually scheduled. This report is very useful if you want to keep a list of your scheduled activities and To-Dos with you, and is designed to fit into a day planner.

## To Print a Daily Schedule Report:

1. From the **Report** menu, select **Activity Reports**, **Daily Schedule**.

   The Daily Schedule dialog box will open.

2. In the `Start Date:` field, enter the first day you want included in the report.

3. In the `End Date:` field, enter the last day you want included in the report.

   The `Form` and `Plain Paper` radio buttons are used to indicate on what type of paper you will be printing.

4. If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.)

**or** If you want the report to print in landscape view with the day planner page “drawn in” around it, select `Plain Paper`.

5. Select the user on whom you want to report from the `User:` list. This list will include all users who have granted you activity view rights.

6. Mark the `Contact Info` check box if you want information concerning the related contact record for linked activities included in the report. Leave it empty if you do not.

   If you marked the `Contact Info` check box, the **Key Fields** button will become available.

7. To select which key field information you want included in the report, click **Key Fields**.

   The Contact Information dialog box will open.

   By default, the report will include information from the Contact, Company, and Primary phone number fields.

8. Use the check boxes to select the key fields containing the contact information that you want included in the report.

- 9. Click **OK** when you have selected all necessary key fields.

   You will return to the Daily Schedule dialog box.

10. Mark `Page Break on Days` if you want a page break between each day of the report. (This report is designed to print in landscape view with two pages side by side on the same sheet of paper. Marking `Page Break on Days` will cause the second page to print on the second half of the paper.)

11. Use the check boxes on the right side of the dialog box to determine which events are to be included in the report:

   - Select the `Activities` check box if you want all pending activities included in the report.
   - Select the `To-Do's` check box if you want all pending To-Dos included in the report.
   - Select `Extended Activities` if you want to include any extended activities that are scheduled on that date.

12. If you want to preview the report before printing, click **View**. (See Page Preview for instructions on using the Page Preview window.)

13. When you are satisfied with the report, click **Print**.

**Or** Click Close to exit without printing.

If you elected to include activities in the report, they will appear on their due date in chronological order. If a duration has been assigned to the activity, both the time it is scheduled to begin and the time it should be completed will be listed. The report will show the activity icon associated with the activity, along with the description of the activity. If the activity is linked to a contact record, the contact's key field information will appear in parentheses after the description. Any comments attached to the activity will appear beneath the activity.

Because To-Dos appear on your calendar in the Activity Manager each day until they are completed, if you have chosen to include To-Dos, they will be repeated on each day of the report. A single exclamation mark will appear on the day before the To-Do is due, two exclamation marks will appear on the day the To-Do is due, and three exclamation marks will appear on every day following, indicating the To-Do is overdue. The To-Dos will include the priority, the due date, the icon associated with the To-Do, the description, and, if the To-Do is linked to a contact record, the contact's key field information in parentheses after the description. Any comments attached to the To-Do will appear beneath the To-Do.

If you chose to include Extended activities, they will show the start and end dates, a double headed arrow indicating this is an extended activity, the description, and any comments attached to the extended activity.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Schedule_Reports)<<1} Activity Schedule Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_History_Report)<<1} Activity History Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Pending_Activity_Report)<<1} Pending Activity Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Printing a Pending Activity Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Printing_a_Pending_Activity_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Pending Activity Report provides you with a list of all incomplete activities, To-Dos, and extended activities.

## To Print a Pending Activity Report:

1. From the **Reports** menu, select **Activity Reports**, **Pending Activities**.

   The Pending Activities dialog box will appear.

2. Enter a date to report on in the `Date:` field, or click on the Date Picker icon to use the Go To Date dialog box. The report will include information on what is past due and what is upcoming, based on this date.

3. Select the paper orientation from the `Portrait` and `Landscape` radio buttons.

   If you select to print in landscape view, the `Form` and `Plain Paper` radio buttons will become active. These are used to indicate on what type of paper you will be printing.

4. If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.)

**or** If you want the report to print in landscape view with the day planner page "drawn in" around it, select `Plain Paper`.

5. Use the `User:` list to select a user on whom to report. You must have full view access to a user's calendar to include him or her in your report.

6. If you want to include only pending activities that are linked to the current contact, select the `Current Contact Only` radio button.

**or** If you want to include unlinked activities and those linked to contacts other than the current contact, unmark the `Current Contact Only` check box.

7. Use the check boxes to select the activity types you want to include in the report:

   - If you want to include activities in your report, mark the `Activities` check box. The report will print the activities listed in order of Past Due, Due Today, and

Upcoming (based on the date entered in step 2).

- If you want to include To-Dos in your report, mark the `To-Do's` check box. The To-Dos will be listed in order of Past Due, Due Today, and Upcoming (based on the date entered in step 2).
- If you want to include extended activities, mark the `Extended Activities` check box. They will be listed in order of Current and Upcoming, (based on the date entered in step 2).
- If you want to include pending activities and/or To-Dos due before the date specified in step 2, mark the `Past Due` check box.
- If you want to include pending activities, To-Dos, and/or extended activities due after the date specified in step 2, mark the `Upcoming` check box.

8. If you want to preview the report before printing, click **View**. (See Page Preview for instructions on using the Page Preview window.)

9. When you are satisfied with the report, click **Print**.

**or** Click **Close** to exit without printing.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Schedule_Reports)<<1} Activity Schedule Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_History_Report)<<1} Activity History Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_a_Daily_Schedule_Report)<<1} Daily Schedule Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Contact Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Contact Reports are designed to give you information concerning your contacts. These reports will use key fields when reporting on contact data, so it is essential that you define your Contact Key Fields in Key Field preferences. In order for this report to print successfully, each database for which you are running the report must have a defined key field for Company and/or Contact, Address 1 and/or 2, City, State, Zip, and Primary Phone. For more information, see the Key Fields topic.

**WARNING!**
When printing TeleMagic reports, use a laser or inkjet printer. Printing any TeleMagic reports on a dot-matrix printer will most likely increase print time significantly.

The Contact Reports sub-menu is accessed by selecting **Contact Reports** from the **Reports** menu.

Contact reports include:

Address/Phone List Report
Contact List Report

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_Envelopes_and_Labels)<<1} Printing Envelopes and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Feature_Reports)<<1} TeleMagic Feature Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

# Address/Phone List Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Address_Phone_List)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Address/Phone List report allows you to print a list of addresses and phone numbers for a single contact, or all contacts in a filter. This can be printed on plain paper, or on personal organizer pages.

## To Print an Address/Phone List:

1. From the **Reports** menu, select **Contact Reports**, **Address/Phone List**.

   The Address/Phone List dialog box will open.

2. Mark the `Current Record Only` check box if you want to print the report on the record currently showing in the Contact Manager. Leave it blank if you want to print on all records in a filter.

3. Select the paper orientation from the `Portrait` and `Landscape` radio buttons.

   If you select Landscape view, the `Form` and `Plain Paper` radio buttons will become active. The `Form` and `Plain Paper` radio buttons are used to indicate on what type of paper you will be printing.

4. If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.)

**or** If you select `Plain Paper`, the report will print in landscape view with the day planner page "drawn in" around it.

5. If you are printing on all records in a filter, select the database on which you want to base the report from the `Database:` list.

6. Select the level containing the records for which you want to print using the database level radio buttons. These radio buttons will reflect the level names for the selected database.

7. If you are printing on all records in a filter, select a filter for your report from the `Filter:` list.

8. If you are printing on all records in a filter, select an index for your report from the `Index:` list. The report will print in order according to the index selected.

9. If you want to preview your report before printing, select

**View**. (See Page Preview for instructions on using the Page Preview window.)

10. To print the report, select **Print**.

**or** Select **Close** to exit the Address/Phone List dialog box without printing.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Contact_List_Report)<<1} Contact List Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Contact List Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Contact_List_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Contact List report allows you to print an address list and, optionally, the notepad and a list of activities linked to the contact. It may also include information from the `Last Revision:` and `Start:` fields, depending on your security access.

## To Print a Contact List Report:

1. From the **Reports** menu, select **Contact Reports**, **Contact List**.

   The Contact List Report dialog box will open.

2. Select the paper orientation from the `Portrait` and `Landscape` radio buttons.

   If you select Landscape view, the `Form` and `Plain Paper` radio buttons will become active. The `Form` and `Plain Paper` radio buttons are used to indicate the type of paper you will be using.

3. If you have pre-printed day planner pages, select `Form`. (This report is designed to print on forms such as the Day Runner™ #480-110. If you are using a different style, you may want to do a test print to check compatibility.)

   **or** If you select `Plain Paper`, the report will print in landscape view with the day planner page "drawn in" around it.

4. If you want to include notes from the Notepad Key Field in the report, leave the `Include Notepad` check box marked. (If you do not have a Notepad key field defined on the current level, the `Include Notepad`, `Start Date:`, and `End Date:` fields will appear dimmed.)

   **or** If you do not want notes from the notepad included in the report, unmark the `Include Notepad` check box.

5. If you have a mark in the `Include Notepad` check box, enter the oldest date for memo field entries to be included in the report in the `Start Date:` field, or click the date picker icon to select a date from the Go To Date dialog box. Any notes prior to the specified start date will not be included in the report. If you leave this field blank TeleMagic will start from the very first note in the notepad.

6. Enter the last date for memo field entries to be included in the report in the `End Date:` field, or click the date picker icon to select a date from the Go To Date dialog

box. Any notes subsequent to the specified end date will not be included in the report. If you leave this field blank, TeleMagic will include everything up to the very last note in the notepad.

7. Leave the `Include Linked Activities` check box marked if you want to print a list of any activities in the Activity Manager that are linked to this contact.

- **or** Leave the `Include Linked Activities` check box empty if you do not want to print a list of activities linked to this contact.

8. If you have marked `Include Linked Activities`, use the radio buttons to specify which linked activities to include:

   - Select `All Activities` if you want to include both pending and completed linked activities.
   - Select `Completed Only` if you would only like to include linked activities that have been marked as completed.
   - Select Pending Only if you want only to include linked activities that have not been marked as completed.

9. If you have marked `Include Linked Activities`, enter a date range for the activities you want included in the report in the `Start Date:` and `End Date:` fields, or use the date picker icons to select the dates using the Go To Date dialog box.

10. Mark the `Current Record` check box if you want to print the report for the current record only. If you want to print for all records in a filter, leave this option unmarked.

11. If you are reporting on all records in a filter, select the database on which you want to report from the `Database:` list, if the desired database is not already displayed.

12. Use the radio buttons to select the level from which the report should pull information. (The level radio buttons will reflect the level names in the selected database.)

13. Select a filter for the report from the `Filter:` list.

14. Select an index from the `Index:` list. The report will print in order according to the index selected.

    If you have selected any Index other than None, the `Group by Index` check box will become active.

15. Mark the `Group by Index` check box if you want the records grouped by the selected index. For example, if you are indexing by City, there will be a page break between each city, with the name of the city appearing as a header on the page.

16. If you want to preview the report, click **View**. (See Page Preview for instructions on using the Page Preview window.)

17. To print the report, click **Print**.

**or** To exit without printing, click **Cancel**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Address_Phone_List_Report)<<1} Address/Phone List Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Printing Envelopes and Labels

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The envelope and label report options print a contact's address information to envelopes, labels, rotary cards, name tags, file folders, index cards, or postcards.

When you choose to print one of the label reports, you can choose from a wide selection of standard AveryTM labels. Selecting to print a pre-formatted envelope allows you to choose from a selection of envelope sizes and styles and choose whether to include a return address, even changing your return address "on the fly".

For information on printing envelopes, see: Printing Envelopes

For information on printing labels (including rotary cards, name tags, file folders, index cards, and postcards), see: Printing from the Labels Sub-Menu

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Contact_Reports)<<1} Contact Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Feature_Reports)<<1} TeleMagic Feature Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

# Printing Envelopes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Printing_Envelopes)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

## To Print Envelopes:

1. From the **Reports** menu, select **Envelopes**.

   The Envelopes dialog box will open.

2. Select your envelope size and style from the drop down `Envelope` list.

3. If you want to include your return address on the envelopes, mark the `Print Return Address` check box.

   The Return Address dialog box will open.

   If you have previously entered a return address in this dialog box, it will be offered as a default.

4. Enter your return address exactly as you want it to print. When complete, click **OK**.

   You will be returned to the Print Envelopes dialog box.

5. If you are printing a single envelope for the current contact, select `Current Record Only` from the **For:** drop-down list. (This option will be selected by default) The `Database:` and `Filter:` and `Index:` options will be unavailable. Skip down to step 10.

**or** If you want to print for all records in a filer, select `Filtered Records` from the **For:** drop-down list.

**or** If you want to print all tagged records, select `Tagged Records` from the **For:** drop-down list.

6. Select a database from the `Database:` list.

7. Select the level for which you want to print envelopes using the level radio buttons. These radio buttons will reflect the level names of the selected database.

8. Select a filter for the envelopes you want to print from the `Filter:` list.

9. Select the order in which the envelopes should print from the `Index:` list.

10. If you want to preview your envelopes before printing, select **View**. (See Page Preview for instructions on using the Page Preview window.)

11. Click **Print**.

The Print dialog box will appear.

12. Click **OK** to print the envelopes.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_from_the_Labels_Sub_Menu)<<1} Printing from the Labels Sub-Menu

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Printing from the Labels Sub-Menu

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Printing_from_the_Labels_Sub_Menu)<
<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½
ï¿½ ï¿½ )<<1}

The options on the Labels sub-menu allow you to print on a variety of label forms, as well as rotary cards, name tags, file folders, index cards, and postcards. Access the Labels sub-menu by selecting **Labels** from the **Reports** menu.

## To Print from the Labels Sub-Menu:

1. From the **Reports** menu, select **Labels**.

2. Choose the menu option you want to print. (If you want to print file folders, index cards, or postcards, choose **Miscellaneous**.)

   **Example:** Address Labels

   The Address Labels or Miscellaneous dialog box will open.

   The first field in this dialog box will indicate which label you have selected and offer a list of layout choices.

3. Select the appropriate format from the list of options. (This field will default to the label that was last printed. If you are printing on the same label type, you do not need to edit this field.)

4. If you want to print a single label for the current contact only, mark `Current Record Only`. (This option will be selected by default.) If you have marked `Current Record Only`, the `Database:` and `Filter:` and `Index:` options will be unavailable.

**or** If you want to print for all records in a filter, leave the `Current Record Only` check box blank.

   By default, TeleMagic starts printing labels on the upper left-hand corner of the sheet of labels. If you have previously printed single labels, there is a good chance that there is no longer a label in this position. You can instruct TeleMagic to begin printing on a different label number.

5. If the label sheet you are using is not full, specify how many blank spots there are using the `Skip the first` field. In the field, enter the number of labels that TeleMagic should skip in order to begin printing on the first label on the sheet. (Labels print vertically from the upper-left corner of the page down the column.)

   If you are not printing a single label for the current contact, the `Database`, level radio buttons, `Filter`, and `Index` options will become available.

6. If you are printing on all records in a filter, select the database on which you want to base the report from the `Database:` list.

7. Use the radio buttons in the middle of the right side of the dialog box to select a database level on which to base the report. These radio buttons will reflect the level names for the selected database.

8. Select a filter from the `Filter:` list.

9. Select the order in which you want your labels printed from the `Index:` list.

10. If you want to preview your labels before printing, select **View**. (See Page Preview for instructions on using the Page Preview window.)

11. When you are satisfied with your selections, click **Print**.

    The Print dialog box will appear.

12. Check your printer settings, then click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_Envelopes)<<1} Printing Envelopes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# TeleMagic Feature Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Most TeleMagic features include report options which allow you to produce a printed copy of the information related to the feature. Often this is simply a print button that prints the information exactly as it is displayed. Some features, however, require more sophisticated reporting, including filtering options for the report information. These reports are covered in the following topics:

List Box Report
Fax Report
Sales Forecasting Reports
Branch Scripting Report
Resources

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Contact_Reports)<<1} Contact Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Printing_Envelopes_and_Labels)<<1} Printing Envelopes and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

# List Box Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_List_Box_Report)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½
ï¿½ )<<1}

The List Box Report allows you to get a printout of the contents of all list boxes in your database.

## To Print a List Box Report:

1. From the **Reports** menu, select **List Box Report**.

   The List Box Report dialog box will open.

   If you are currently in edit mode in the Contact Manager, and there is a list box attached to the field in which your cursor is positioned, the `Current Field Only` checkbox will be available.

2. If you want to report only on the field in which your cursor is currently positioned, mark the `Current Field Only` check box.

**or** If you want to include the list boxes from all fields in a database, select the contact level on which you want to report from the level radio buttons. (These buttons are labeled with the names of the levels.)

3. If you are reporting on all fields in a database, select the database on which you want to report from the Database: drop-down list. (This will default to the current database.)

4. If you want to preview the report, click View. (See Page Preview for instructions on using the Page Preview window.)

5. To print the report, click Print.

   A Windows Print dialog box will open. Make any changes necessary. Avalable options will depend on your hardware.

6. Click **OK** to send the report to your default printer.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Feature_Reports)<<1} TeleMagic Feature Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Fax Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Fax Report is useful for tracking important details of individual faxes, based on the filters you specify, and for providing a statistical summary of all faxes by status. (For more on sending faxes, see the Faxing topic.)

## To Print a Fax Report:

1. From the **Reports** menu, select **Fax Reports**.

   The Fax Report dialog box will open.

2. Use the `Start Date:` and `End Date:` fields to specify the date range on which you want to report.

3. If you want to report on faxes that are currently in one of the queues, choose the `Queue` radio button. Select the desired queue from the drop-down list. (If you are not a supervisor user, you will only be shown your own faxes processed by that queue.) If you want to report on faxes you have sent locally (not through the server), select the `Local Faxes` option. (If there is no `Local Faxes` option on the list, it has been disabled at the Automation Server. See the Setting Up a Queue topic for more information.)

   **or** If you want to report on faxes that have been archived, select the `Archive` radio button. This will create a report on the sent faxes that have been archived through rebuild at the Automation Server.

4. If you want to report on faxes processed by a specific server, select the server from the `Server` list box. Select `All` if you do not want to filter by server. (This option is not applicable if you selected Local Faxes in step 3, above.)

5. If you want to report on faxes processed by a particular faxmodem at the server, select the COM Port to which it is attached from the `Port` list box. Select `All` if you do not want to filter by Port. (This option is not applicable if you selected Local Faxes in step 3, above.)

   If you are a supervisor user and have selected any fax queue other than Local, you will be given the option of selecting the group of users on which to report.

6. If you want to report on a group of users, select the `User Group` radio button and choose a group from the drop-down list.

   **or** If you want to report on an individual user, choose the `Individual` radio button and select the user from the drop-down list.

7. Mark the `Detail` check box if you want to include additional information concerning the faxes in the report. `Detail` will include the date and time the fax was queued and processed, the ID of the user who sent the fax, the user's name, to whom the fax was sent, and the fax number.

8. If you have marked `Detail`, you will also have the option of including the names of the documents and reports that were faxed, and any cover notes that were included. Mark the `Document Names` and `Cover Sheet Notes` check boxes accordingly.

9. Clicking `Statistics` includes a statistical summary of the specified faxes.

   The Statistical Summary groups faxes by their status, giving the actual number of faxes in each group, the percentage of all faxes each represents, the average time in minutes in the queue for each type, the average time in seconds it took for the creation (including merge) of each document, and the average time in seconds it took to process each fax, with totals. Additionally, it provides a breakdown of faxes that failed, grouped by the type of error encountered.

10. From the `Report on` check boxes, choose the status of the faxes on which you want to report. Use these check boxes as follows:

    - `All Faxes` will report on every fax, regardless of status. When this is checked, all other options are automatically checked and dimmed. (Leave the `All Faxes` box empty to select an individual status.)
    - `Sent` will report on all faxes successfully sent.
    - `Failed` will report on faxes that were attempted unsuccessfully.
    - `All Pending` will report on all faxes currently in the queue waiting to be processed. When this option is selected, all of the following options are automatically checked and dimmed. If this is not selected, the following options can be chosen individually:
    - `Active` reports on the fax currently being processed.
    - `Done` pertains to the master fax in a set of filtered faxes. When you send a fax to every contact in a filter, the filter is not expanded until you go into process mode. Initially, what is sent to the queue is a placeholder for the information pertaining to the fax, not actual contact information. When the queue is processed, this is expanded to include each contact in the filter. The status `Done` is assigned to that placeholder to indicate that the filter has been expanded.

- `Hold` reports on faxes for which a `Delay Until` time and date have been entered in the Options section of the Send Fax dialog box.
- `Queued` reports on faxes that have not yet been attempted and are in line to be sent.
- `Retry` includes faxes that have been unsuccessfully attempted and are waiting to be tried again.

11. Click **View** to open a view window where you can preview the report. (See Page Preview for instructions on using the Page Preview window.)

12. When satisfied with your selections, click **Print** to send the report to your printer.

**or** Click **Close** to exit without printing.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Feature_Reports)<<1} TeleMagic Feature Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# System Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_System_Reports)<<1} {ewc
rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½
ï¿½ )<<1}

System Reports are accessed by selecting **System Reports** from the **Reports** menu.

These options allow you to produce reports on various system settings, such as database layout and TeleMagic security settings, to help you to administer the program more efficiently.

The Following system reports are available:

Database Structure Report
Group Security Report
User Security Report
System/Database Preference Report
User Preference Report
Error Report

**WARNING!**

TeleMagic reports often use very high quality fonts and graphics by taking advantage of laser and ink jet printer technology. Most dot-matrix printers interpret laser or ink jet fonts as graphic images, and therefore require very long print times. Therefore, we do not recommend using most dot-matrix printers to print TeleMagic reports.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TM.HLPï¿½RPT1_Activity_Reports)<<1} Activity Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.bmp<JumpId(TM.HLPï¿½RPT1_Contact_Reports)<<1} Contact Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.bmp<JumpId(TM.HLPï¿½RPT1_Printing_Envelopes_and_Labels)<<1} Printing Envelopes and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.bmp<JumpId(TM.HLPï¿½RPT1_TeleMagic_Feature_Reports)<<1} TeleMagic Feature Reports

# Database Structure Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<noteup01.bmp|
notedn01.bmp<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Database_Structure_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Database Structure Report lists and defines all the fields in the database by field type; length; expressions; the views and pages on which they appear; all the user-defined indexes in the database; and all the user-defined filters in the database.

When you choose this option, the Select Databases to Report On dialog box will open.

Select the databases on which you want to report from the list on the left by highlighting them and clicking **Add**. When you click **OK**, a Print dialog box will open. Select **OK** to print the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Group Security Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Group Security Report is one of two security reports. It will report the security settings for all TeleMagic security groups, and list the members of each group.

When you choose this option from the menu, a Print dialog box will open. Click **OK** to print the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# User Security Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_User_Security_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The User Security Report will report the security settings for one or more users. The report will show user's group membership(s), and what global- and database-specific rights each of those groups has. It will also show what cumulative rights each user has when all security group memberships have been taken into account.

Access this report by opening the **Reports** menu and selecting **System Reports…**, **User Security Report.** The Select Users to Report On dialog box will open.

Select the users on whom you want to report from the list on the left by highlighting them and clicking **Add**. When you click **OK**, a Print dialog box will open. Select **OK** to print the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# System/Database Preference Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The System/Database Preference Report shows the database preference settings for every installed database. It also lists the System ID, and number of errors reported while this database was in use.

When you choose this option, the default Windows Print dialog box will open. Click **OK** to send the report to the default printer. (If you need to change the default printer, click **Setup,** change the printer, click **OK,** and click **OK** again to print the report.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# User Preference Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The User Preference Report shows all of the preference settings for a group of selected users, or for all users in your system.

If you do not have security rights to edit your preferences, the Windows Print dialog will open when you choose this menu option. Click **OK** to send the report to the default printer. (If you need to change the default printer, click **Setup**, change the printer, click **OK**, and click **OK** again to print the report.) The report will provide information on your own preferences.

If you do have security rights to edit your preferences, the Select Users to Report On dialog box will open when you choose this menu option.

Select the users on whom you want to report from the list on the left by highlighting them and clicking **Add**. Select **Add All** to report on all users. When you click **OK**, the Windows Print dialog box will open.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Standard_Reports)<<1} System Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Error Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Error_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Error Report prints a complete detailed listing of every error in the system error log, either for all users or for selected user(s). These reports can be *extremely* long, and include not only which errors have been reported, but also the status of TeleMagic, and of the user's hardware and software configuration at the time of the error.

When you choose this option, an Error Report dialog box will open.

If you want to limit the report to the logs of one or more particular users, choose the `Select Users` radio button. The Select Users to Report On dialog box will open.

Select the users on whom you want to report from the list on the left by highlighting them and clicking **Add**. Click **OK** to exit this dialog box.

If you leave both check boxes unmarked, the report will only print the most basic information such as the User ID of the user who logged the error, the date, time, and error message. If you mark `User Explanation`, the report will also include any notes the user made when logging the error. If you mark `Technical Info`, the report will include program information from the time the error was logged. (This information should generally be included if you are getting technical support for the problem.)

When you click **OK** at the Error Report dialog box, the default Windows Print dialog box will open. Click **OK** to send the report to the default printer. (If you need to change the default printer, click **Setup**, change the printer, click **OK**, and click **OK** again to print the report.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_System_Reports)<<1} System Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_List_of_Standard_Reports)<<1} List of Standard Reports

# Producing Quick Lists

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

A quick list is a quick report you can generate “on the fly." To create a quick list, you tell TeleMagic which records to use, which fields from those records you want printed, and in what order. TeleMagic then lays the fields out on a page.

You can save and modify quick list formats, but their chief feature is speed; they are designed to let you print information *fast*. If you want a report that includes pictures, OLE fields, or custom layout and formatting, you must create a custom report.

## To Create a Quick List:

1. From the **Reports** menu, select **Quick Lists**.

   The Quick Lists selection box will open.

2. Choose **Add**.

   The Quick List dialog box will open.

3. Type a name for the list in the `Quick List name:` field.

4. Use the `Use Data from:` drop-down list to select the database level from which your list will draw information. The selections will reflect the level names in the current database. You also have the option of basing the report on information from the Activity Manager.

5. Use the `Filter:` list to select the filter for your quick list. The list will include all filters that exist in the current database. (For help in creating filters, see the Creating Filters topic.)

6. Use the `Index:` list to select an index for your quick list. The report will print in the order of the index selected.

7. Choose **Fields…**.

   The Select Fields for the Quick List dialog box will open.

8. Select a field to include on your quick list, then choose **Add**.

   The field name will appear on the right side of the dialog box.

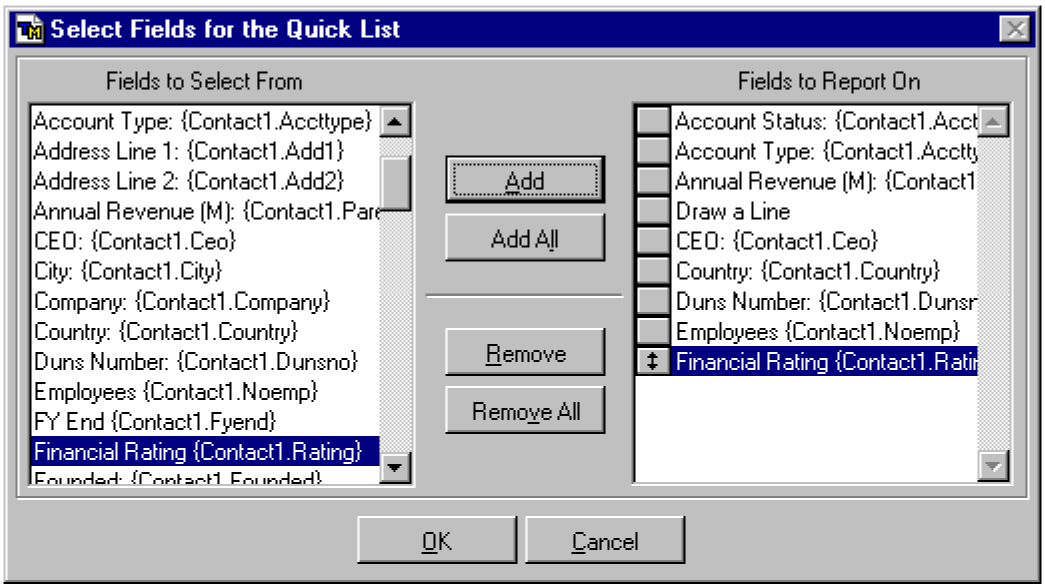
9. Repeat step 8 until you have added all fields that you want to include.

   Data from each field will appear on the quick list beneath the field name. Field names will appear in order from left to right across the page.

10. To include formatting in your quick list, select from the following options:

- Select `Tab` to insert extra space between fields on the same line.
- Select `New Line` to start the next field on a new line.
- Select `Draw a Line` to insert a line after a group of field names.
- Use the mover button to change field order.

When you have finished, the completed dialog box will look similar to this:




**Sample Select Fields for the Quick List Dialog Box, Completed**

11. Choose **OK**.

    The Select Fields for Quick List dialog box will close, leaving the Quick List dialog box your screen.

12. Click anywhere on the Sample Quick List area of the dialog box to make its window active.

    The Sample Quick List area shows how text for each record will be laid out in your report. The field prompts will be listed with a place holder for the field length.

13. If you need to adjust the field layout, click **Fields…**. Refer to step 10 for formatting options.

14. When satisfied with your quick list, click **OK**.

    The Quick List dialog box and Sample Quick List will close. The new quick list name will appear in the Quick Lists selection box.

15. Choose **Close**.

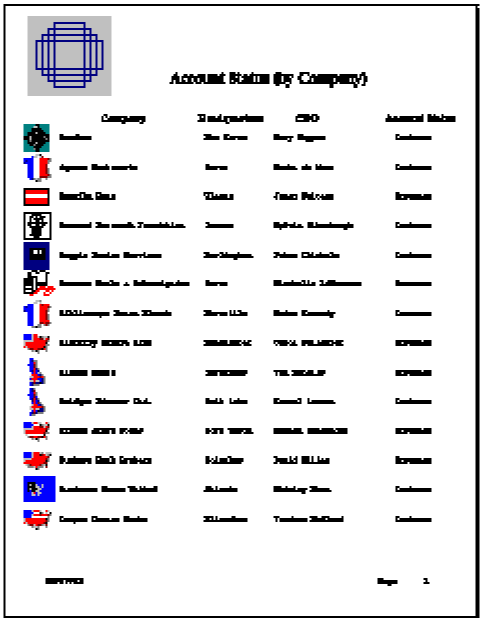
**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1} Printing Custom Reports and Quick Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Reports)<<1} TeleMagic Reports

# Producing Custom Reports and Labels

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}




**Preview of a Sample Custom Report**

The Report Generator allows you to create custom reports using your own layout, text formats, and illustrations.

TeleMagic uses the Visual FoxPro Report Designer to produce custom reports and labels. It is a powerful tool, and with experience you can use it to create professional-quality output. Using the Report Generator is not difficult. You can learn the basics in one session.

You can create reports and labels by placing text, fields, pictures, lines, and other objects in the bands (sections) of the Report Layout window. These objects can then be arranged in a variety of ways. You can also preview the report or label it before printing.

When you produce a new custom report, you will be able to restrict its access to specific non-supervisor users. (Supervisors have access to all custom reports.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_What_You_ll_Need)<<1} What You'll Need

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Report_Design_and_Planning)<<1} Report Design and Planning

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Accessing_the_Report_Generator_and_Starting_a_Report)<<1} Accessing the Report Generator and Starting a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1} Printing

Custom Reports and Quick Lists
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½RPT1_TeleMagic_Reports)<<1} TeleMagic Reports

# What You’ll Need to Produce a Custom Report or Label

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Report Generator is a powerful tool with enough flexibility to produce useful and visually appealing reports very quickly. Although it has many elements, they need not all be mastered in order to generate the report you need. The interface is largely intuitive, but the Report Generator will be most effectively employed by indivduals with certain knowledge and skills:

### Basic Windows skills.

You should know how to use a mouse, open a menu, and select options from a menu, toolbar, or dialog box. Specifically, you should be able to “drag and drop” with the mouse. If you are not comfortable with these skills, see Basics of Using TeleMagic Enterprise

### Some familiarity with TeleMagic.

You will be more comfortable using the Report Generator after you have learned how to view records, switch among view levels, and create and use filters and indexes. You should also understand the basic terms such as “field,"“record”, and “database”. If you need help with these techniques or terms, click the **Glossary** button at the top of this help window. If you need help with basic contact management skills, see the appropriate topic in the Contact Management topic.

### Some understanding of basic design and layout terms.

You will be more comfortable with the report design instructions if you understand terms such as “font," “font size," "fill color” and "grid." If you need help with these or other Report Generator terms, look for their definitions in the *Glossary*.

### Basic understanding of your Contact Database structure.

If you have designed your own Contact Database, this is no problem; but if you are learning to use an existing Contact Database, you will find report design easier if you find out a few things about it:

How many levels does it have?

What is stored at each level?

How do you use your data?

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Report_Design_and_Planning)<<1} Report Design and Planning

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Accessing_the_Report_Generator_and_Starting_a_Report)<<1} Accessing the Report Generator and Starting a Report

# Report Design and Planning

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

There are several questions you should answer before you start building your report. Among them:

- What do you need to give the reader of the report to ensure it is clearly understood?
- Will graphics improve the presentation?
- What elements of the report require explanation or annotation?
- What data are relevant? Information from your Activity Manager, or from your Contact Database?
- Which records do you want reported on:
  - All records?
  - Records for a particular account manager or region?

Once you have identified the principal elements of your report, you may find making a quick sketch on paper will help you to visualize the optimum presentation.

Plan on following this six-part process when it comes to actually creating a report:

1) Plan your report;

2) Start the Report Generator;

3) Add text and other major objects, such as pictures;

4) Define fields and add calculated expressions;

5) Complete layout. This includes moving, sizing and layering text and objects, drawing lines, customizing fonts and colors, and setting any other characteristics which affect the appearance of your report;

6) Save your work.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_What_You_ll_Need)<<1} What You'll Need

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Accessing_the_Report_Generator_and_Starting_a_Report)<<1} Accessing the Report Generator and Starting a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Accessing the Report Generator and Starting a Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Accessing_the_Report_Generator_and_Starting_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

## To Access the Report Generator and Start a Report:

1. From the **Reports** menu, select **Custom Reports**.

   The Custom Reports selection box will appear.

2. Choose **Add**.

**or** Highlight one of the sample reports and choose Change.

   The Custom Report dialog box will open.

3. In the `Name:` field, enter a descriptive name for the report. This is the report description that will appear in the Custom Report selection box, not the actual name under which the file is stored.

   TeleMagic will generate a unique file name in the `Filename:` field. You can accept this file name or give the report a different unique file name.

4. If you want to change the file name, enter it in the `Filename:` field. The file name must be eight characters or fewer, and use only valid special characters (such as the underscore character). The report file name can only be changed when the report is first added. After that, only the description can be changed.

   The `Use Data from:` list allows you to set a level for your report.

5. Select the database level for the records on which you will be reporting from the `Use Data from:` list, or select `Activities` from that list to base the report on data from the Activity Manager.

6. If you want to select a group of records on which to report, select a filter from the `Filter:` list. (This option will not be available if you have selected to base your report on the Activity Manager.)

7. If you want the data to print in the order of an existing index, select it from the `Index:` list.

   TeleMagic uses the FoxPro report generator to create custom reports. This report generator does not respect field-level security. If a user does not have access to view a field in TeleMagic, he or she will still be able to view it in a custom report. By default, all users who may access this database will be able to view and print this report. If you are including sensitive data in your report, you should limit access to authorized users.

8. If your report does not contain sensitive data, skip to step 10.

- **or** To limit rights to this report, mark the `Limit report access to certain users` check box.

  When you mark `Limit report access to certain users`, the Select Users dialog box will open.

9. If you want to select all users in an existing user group quickly, select the group from the `Give Access to Users from Group` drop-down list. All users in the selected group will move from the `Users Without Access` list to the `Users With Access` list. Repeat this for each group you want included.

- **or** If you want to select individual users, highlight each user in the `Users Without Access` list and click **Add**. The user will move to the `Users With Access` list. To remove a user, highlight him or her in the `Users With Access` list and click **Remove**. The user will return to the `Users Without Access` list.

10. When you are satisfied with your selections, click **OK**.

11. To open the report generator, choose **Edit**.

    The Report Generator screen will open.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Finalizing_the_Report)<<1} Finalizing the Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Sample_Reports)<<1} Sample Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

# Bands in the Report Generator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The main Report Generator window consists of a toolbox, a menu, a status bar, and the main work area. The work area is divided into bands.

Bands are used in the Report Generator to divide a report into sections. The Report Generator Layout window initially contains three sections, or bands (separated by band separator bars) for page headers, report details, and page footers. Additional bands become available if you define groups, a title page or a report summary. Each band can contain text, data fields, computed fields, calculated values, pictures, lines and boxes.

Understanding Band Types
Changing Band Size
To Remove a Band:

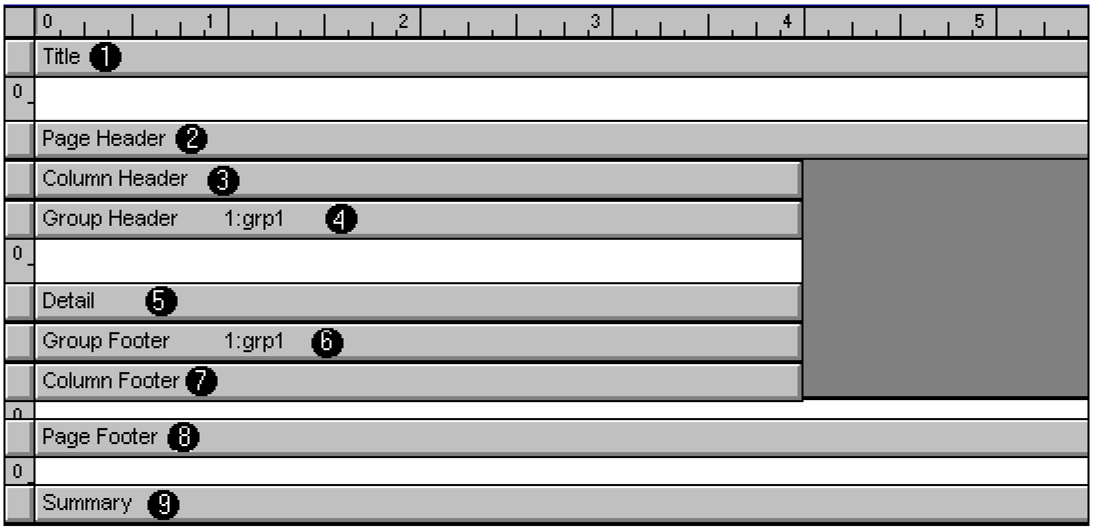
## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Finalizing_the_Report)<<1} Finalizing the Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Sample_Reports)<<1} Sample Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

# Understanding Report Band Types

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The types of band that you can use in TeleMagic Report Generator are illustrated here:




**Report Layout Window, All Band Types Shown**

Click on a band in the above illustration to learn about the band type.
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1}

# 1.Title

The title band contains information that appears before the main report. A report title is anything you want to appear on the first page of your report. It can be as simple as the name of the report at the top of the page, or it may be an introductory paragraph, letterhead, or cover letter. The title band information is printed once for the entire report. See: Creating a Title and Summary

## 2.Page Header

The page header band is located at the top of each page of the main report. Page headers usually contain a combination of fixed and variable data – things such as the report title, date and page number, or headings for specific data. The page header band appears in reports by default.

**Hint**

When you create a label, you typically will not want a page header. To keep the page header band from printing, simply do not place any objects into the band.

# 3.Column Header

You have the option of selecting a column header if you are including more than one column for your report. The information for the column header is included in the column header band and is printed at the top of each column. See: Page Layout for information on adding columns to a report.

## 4.Group Header

Grouping data means causing information to be printed in sub-sets. For example, you might want to print sales prospect lists *grouped* by region, state, or zip code. When data is grouped, each group has a group header band. The information included in the group header band is printed before the group and helps to identify the information that is contained within each level of grouping. See: Data Grouping

## 5.Detail

The detail band makes up the body of the report. Generally, it contains information from selected fields, or from calculations performed on fields. Detail information is represented by place holders (such as field names) in the detail band. These place holders are replaced by up-to-date information from your database whenever the report is printed. For example, a listing of company names, addresses, and contact names would appear in the detail portion of a report. (The detail band is included in all reports by default.)

# 6.Group Footer

When data is grouped, each group can have a group footer printed after it. Group footer information is included in the group footer band and typically displays summaries and/or subtotals within each level of grouping. For example, if you grouped a contact list by ZIP code, you might want to include the total number of contacts for each ZIP code area in a group footer. See: Data Grouping

# 7.Column Footer

When you include more than one column in a report or label, a column footer band will be added. Column footer information is included in the column footer band and typically displays summaries and/or subtotals of the information in the column. See: Page Layout for information on adding columns to a report.

## 8.Page Footer

The page footer band is located at the bottom of each page of the main report. Like the page header, the page footer usually contains a combination of fixed and variable data, such as report name, date and page number. It may also include summary information (such as averages and totals) for data on the page. (The page footer is included in all reports by default.)

## 9.Summary

The summary band is one or more pages that appear after the main report. Like the title band, it is printed only once per report. It can contain summary data, or text that summarizes the report.
See: Creating a Title and Summary

## Changing Report Band Size

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

You can change band height to add white space to headers and footers, allow space for introductory or summary paragraphs, and to accommodate graphics and illustrations.

To Adjust the Size of a Band by Dragging:
To Precisely Control the Size of a Band:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1}

## To Adjust the Size of a Report Band by Dragging:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Place your cursor anywhere on the band separator.

   The cursor will turn into a two-headed arrow.

2. Drag until the band is the desired size.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_To_Precisely_Control_the_Size_of_a_Band)<<1} To Precisely Control the Size of a Band:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator

# To Control Precisely the Size of a Report Band:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

For pre-printed forms or labels, it is important to control headers, footers, and detail band height precisely.

1. To set a specific band height, double click anywhere on its separator bar.

   A Report Band Dialog Box dialog box will open.

2. Set the height of the band in the `Height:` field. The height can be entered either by placing the cursor in the field and typing, or by using the spinner arrows.

3. Check `Constant Band Height` if you want to prevent the band from stretching to accommodate lengthy data, or shrinking to absorb blank lines that have been removed.

4. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_To_Adjust_the_Size_of_a_Band_by_Dragging)<<1} To Adjust the Size of a Band by Dragging:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator

## To Remove a Report Band:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Place your cursor anywhere on the band separator.
2. Move the band separator bar flush with the band separator bar above it.

   The band will still be visible in the Report Generator but will be removed from your printed report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|CONTDN01.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1}

## Report Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The first thing you should do when working with your reports is to configure your page settings. Before adding fields or other objects, it is a good idea to define the dimensions of the report and decide if you will be using columns. Additionally, if you will be including a title or a summary in the report, you should create bands in the Report Generator for those options before you start to add text and other objects. (This will allow you to add all of your objects at one time.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Page_Layout)<<1} Page Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Creating_a_Title_and_Summary)<<1} Creating a Title and Summary

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Report Page Layout

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Before you begin creating any report, you should check the page layout. Use page layout to tell TeleMagic the size and orientation of the page you will print, and which font you want to use as your default. You can also use page layout to set the number, print order, width, and spacing of columns.

## To Set Up Page Layout for a Report:

1. With the report you want to print open for editing in the Report Generator, select **Page Setup** from the Report Generator's **File** menu.

   The Page Setup dialog box will open.

   The `Page Layout:` display will be updated as you make selections in this dialog box and will reflect the result your selections have on the printed report.

*In the `Columns:` section:*

2. In the `Columns:` field, enter the number of columns you want to use in your report. If you do *not* want to use multiple columns, leave the number 1 in this field.

3. If you are using more than one column, use the `Width:` field to specify the width of each column.

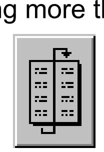
4. If you are using more than one column, use the `Spacing:` field to specify the space between columns.

*In the `Print Area:` section:*

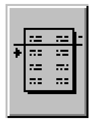
5. Select `Printable Page` to ensure that your margins are within the printable area of the page.

**or** Select `Whole Page` to ignore the printable area of the page and allow the report to take up the entire page.

*Under Print Order:*

6. If you are using more than one column, under `Print Order:`, click  if you want to have the data print in index order, column by column.

**or**

Click  if you want to have the data print in index order, row by row.

7. Use the `Left Margin`: field, to widen or narrow the left hand margin of the report (creating a gutter). Note how the image in the `Page Layout:` preview box changes as you increase or decrease this margin.

   The unit of measurement you have selected will be indicated next to `Dimensions:`. Dimensions are expressed either in pixels or your system default. To change between the two, select **Set grid scale** from the **Format** menu. To change your system default, consult your operating system documentation. The numbers in the `Margin` and `Columns` size fields will adjust to reflect your settings.

8. Click **Print Setup** to open the Print Setup dialog box.

*In the `Printer` section:*

9. The `Name:` drop-down list will allow you to use a printer other than the default system printer.

10. The Properties button will open the **Properties** dialog box for your printer. See your printer's documentation for more information on available options.

*In the `Paper` section:*

11. Select your paper size from the `Size:` drop-down list.

12. Select the source for the paper from the `Source`: drop-down list.

*In the `Orientation` section:*

13. Choose paper orientation. This can be Portrait or Landscape.

14. Click **OK** to save the settings and return to the Page Setup dialog box.

15. Click **OK** to close the Page Setup dialog box.

16. From the **Report** menu, select **Default Font**.

    The Font Dialog Box will open.

17. Choose the default `Font:`, `Font Style:`, `Size:`, and

`Style:` from the respective lists. TeleMagic will use this font for all printed text, unless you specify otherwise for a specific piece of text. A sample of the selected text will appear in the `Sample` section.

18. Click **OK** to save all changes and return to the Report Generator.

Once you have your page layout established, you are ready to start adding objects to your report.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1}

# Creating a Report Title and Summary

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Creating_a_Report_Title_and_Summary)
<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½
ï¿½ï¿½ )<<1}

A title allows you to preface the report with any pertinent information. For example, you may include a separate page containing your company name and logo and copyright information. Alternatively, you may want to start the report simply with a quick paragraph explaining some aspect of the information readers are about to view.

A summary allows you to sum up the report information in a page or a paragraph. You can have a quick paragraph at the end of the report, or a summary page containing extensive text or graphics.

## To Create a Title and/or Summary:

1. From the **Report** menu, select **Title/Summary**.

   The Title/Summary dialog box will open.

2. If you want to include a title in the report, mark `Title Band` under `Report Title`.

3. If you are including a title and want it printed on a separate (cover) page, mark the `New Page` check box under `Report Title`.

**or** If you want the title to print with the main body of the report immediately following on the same page, leave `New Page` unmarked.

4. If you want to include a summary in the report, under `Report Summary`, mark `Summary Band`.

5. If you are including a summary and want it printed on a separate (final) page, mark the `New Page` check box under `Report Summary`.

**or** If you want the summary to print immediately following the main body of the report on the same page, leave the `New Page` check box under `Report Summary` unmarked.

6. When satisfied with your selections, click **OK**.

   Your new title and/or summary band will appear in the Report Generator Layout window.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½RPT3_Page_Layout)<<1} Page Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Adding Objects to a Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Adding_Object_to_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Report Controls Toolbar contains all of the controls used to add objects to your report. If this toolbar is not open, click the Report Controls Toolbar button (  ), located on the Report Designer Toolbar. This is a Dockable Toolbar. Once opened it can be placed anywhere within the Report Generator window. The Report Generator will retain the placement setting of this and any other toolbar for future editing sessions. These stored settings are specific to each report.

These controls allow you to create objects and place text into your report. When you select a tool, a description of the tool is displayed on the status bar until you release the mouse button (provided that you are not using the Show Position feature). The tools are also identified by ToolTips . To use a tool, first select it, then move the mouse pointer onto the band in where you want to work, and click. Depending on the type of object being added, you may need to change the size of the object (rectangles and OLE objects), enter text (text objects), or specify an expression or variable (field objects) to be printed.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_and_Editing_Text)<<1} Adding and Editing Text:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Fields)<<1} Adding Fields:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Drawing_Lines_Boxes_and_Circles)<<1} Drawing Lines, Boxes and Circles:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Pictures_and_Other_Graphics)<<1} Adding Pictures and Other Graphics:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Selecting_Objects)<<1} Selecting Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Selecting Report Objects:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Before you can manipulate text or objects, you must select them. You can select any combination of objects. When multiple objects are selected, they act as one object when moved, edited (cut, copied, or pasted), or deleted.

You will use the pointer tool to select objects:

•

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Select_Objects)<<1} To Select Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Invert_the_Selection_of_Objects)<<1} To Invert the Selection of Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Deselect_Objects)<<1} To Deselect Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

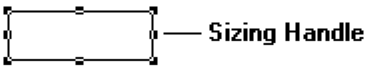
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Select Report Objects:

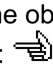
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

- To select a single object, click the selection pointer, then click in the object.

  Sizing handles will appear around the object:




- To select multiple objects, hold down the SHIFT key and click on each object.

  **or**
  Draw a rectangle with dotted lines (marquee) around the objects you want to select, by clicking outside the objects and dragging the mouse over them. (The mouse will turn into a left-pointing hand: ) A marquee shows what has been selected. Objects that are partially contained in the marquee are selected as well.

- To select all objects in a particular band, double click on its band separator bar.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Deselect_Objects)<<1} To Deselect Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Invert_the_Selection_of_Objects)<<1} To Invert the Selection of Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Group_Ungroup)<<1} Group/Ungroup Selected Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## To Invert the Selection of Report Objects:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

You can invert the selection of objects using the selection marquee. When you invert objects, selected objects become deselected and deselected objects become selected.

- While holding down the SHIFT key, drag the mouse to draw the marquee around the objects you want to invert. Then release the mouse button. Objects that were selected are now deselected and objects that were deselected are now selected.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Select_Objects)<<1} To Select Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Deselect_Objects)<<1} To Deselect Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## To Deselect Report Objects:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

- To deselect *all* selected objects in the report layout windows, position the pointer off the selected objects and click.

- To deselect *single* objects when multiple objects are selected, press SHIFT and click on each selected object that you want to deselect.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Select_Objects)<<1} To Select Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Invert_the_Selection_of_Objects)<<1} To Invert the Selection of Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Group_Ungroup)<<1} Group/Ungroup Selected Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## Adding and Editing Report Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Adding_and_Editing_Report_Text)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Text is most often used in titles, headers, and summaries. It is used less often in the detail band. You can edit text at any time, and specify its font, color, and size. Once placed, text is treated as an object and can be selected, moved, stacked, or deleted.

The text tool is used to add text:

•

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_Text)<<1} To Add Text
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Edit_Text)<<1} To Edit Text
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Font_or_Size)<<1} To Change Text Font or Size
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Object_Attributes)<<1} To Change Text Object Attributes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Text_Alignment)<<1} Changing Text Alignment
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

# To Add Report Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Choose the text tool on the Report Generator toolbar.
2. Move your mouse pointer into the Report Generator band where you want the text to appear.

   The pointer will display as a text insertion point: I

3. Click where you want the text to begin, and type.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Edit_Text)<<1} To Edit Text:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Font_or_Size)<<1} To Change Text Font or Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Object_Attributes)<<1} To Change Text Object Attributes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Text_Alignment)<<1} Changing Text Alignment

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

# To Edit Report Text:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Select the text tool.
2. Place the insertion point in the text where you want to begin editing.
3. Make the desired additions or changes.
4. To create multiple lines of text within an object, press ENTER to begin a new line.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_Text)<<1} To Add Text:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Font_or_Size)<<1} To Change Text Font or Size:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Object_Attributes)<<1} To Change Text Object Attributes:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Text_Alignment)<<1} Changing Text Alignment
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

# To Change Report Text Font or Size:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Select the text object.
2. From the **Format** menu, select **Font**.

   The Font dialog box will open.
3. Select the font, style, size, effects, and script you want for the selected text.

   A sample of the selected text options will appear in the Sample section as you change the selections.
4. When satisfied, choose **OK**.

   The text will appear in the new font and size.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_Text)<<1} To Add Text:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Edit_Text)<<1} To Edit Text:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Object_Attributes)<<1} To Change Text Object Attributes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Text_Alignment)<<1} Changing Text Alignment

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

# To Change Report Text Object Attributes:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Double click on a text object with the select pointer.

   The Text dialog box will open.

   In this dialog box you can determine when the text prints, indicate its relative position in a band, and add comments.

2. Mark the `Print When` check box to open the Print When dialog box.

   The Print When dialog box allows you to establish exactly when the text is printed in your report or label. See The Print When Dialog Box for instructions on using this dialog box.

3. When satisfied with your selections in this dialog box, click **OK** to return to the Text dialog box.

4. The `Position Relative To` radio buttons allow you to choose whether the text you have included within a band retains its position relative to the top of the band or the bottom of the band. (This applies to bands that stretch to accommodate fields that stretch.)

   - Choose `Float` if you want the selected field to move relative to the size of the surrounding fields.
   - Choose `Top` if you want text to retain its position relative to the top of the band.
   - Choose `Bottom` if you want text to retain its position relative to the bottom of the band.

5. Click **OK** when you have made your selections in this dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_Text)<<1} To Add Text:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Edit_Text)<<1} To Edit Text:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} To Change Text Font or Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Text_Alignment)<<1} Changing Text Alignment

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report

Objects

# Adding Fields to a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Field objects are normally used as “place-holders” in the detail band. Field objects display data from fields, calculated values, or calculated fields. For example, if you wanted to see a listing of contact names, you would place a field in the detail band at the location where you want the name list to begin. You can add fields one at a time using the field tool on the toolbox, or you can add all of your report fields at one time using the Quick Report feature.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Place_a_Field_in_a_Report)<<1} Adding Fields Using the Field Tool

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Fields_Using_Quick_Report)<<1} Adding Fields Using Quick Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Adding_Activity_Fields)<<1} Adding Activity Fields to Reports

# To Place a Field in a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_To_Place_a_Field_in_a_Report)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Use the field tool to add fields:

1. Click the field tool on the Report Controls toolbox.
2. Move your mouse pointer into the Detail band.

   The pointer will display as a crosshair: +
3. Click where you want the field to appear, and drag the field to the desired size.

   The Report Expression dialog box will open.
4. Click the ellipsis button ( ... ) next to the **Expression:** field.

   The Expression Builder dialog box will open.
5. In the `Fields:` list, double-click the name of the field you want to place on your report.

**or** In the `Variables:` list, double-click the name of the variable you want to place on your report.

**or** Write an expression to be evaluated. See the help topics on the Expression Builder for more information.

The field name, variable, or expression will appear in the `Expression for Field on Report:` box.

6. Choose **OK**.

   The Expression Builder dialog box will close. You will be returned to the Report Expression dialog box.
7. If you want to format this field further, click the ellipsis button ( ... ) next to the **Format:** field.

   The Format dialog box will open.

   For more information on this dialog box, see The Expression Format Dialog Box.
8. Click **OK** to close the Format dialog box and return to the Report Expression dialog box.
9. If you want a calculation performed on the field, click `Calculations...`.

The Calculate Field dialog box will open.

For more information on using this dialog box, see The Calculate Field Dialog Box.

Click **OK** when finished.

10. In the Report Expression dialog box, choose **OK**.

    The Report Expression dialog box will close.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Fields_Using_Quick_Report)<<1} Adding Fields Using Quick Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

## Drawing Lines, Boxes and Circles in a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Drawing_Lines_Circles_and_Rectangles
)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½
ï¿½ ï¿½ )<<1}

To Draw a Vertical or Horizontal Line:
To Draw a Rectangle:
To Draw a Rectangle with Rounded Corners:

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPTX_Hint_for_Adding_Object_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Draw a Vertical or Horizontal Line in a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_To_Draw_a_Vertical_or_Horizontal_Line_in_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Click on the line tool ( ● ) in the Report Generator toolbox.

2. Position the pointer where you want the end of the line to be.

3. Drag until the line is the desired length, and release the mouse.

   The line will have sizing handles at either end.

4. If you want to further configure your line, double-click one of the handles.

   The Rectangle/Line dialog box will open.

5. Mark the `Print When` check box to open the Print When dialog box.

   The Print When dialog box allows you to establish exactly when and how the line is printed in your report or label. See The Print When Dialog Box.

6. When satisfied with your selections in this dialog box, click **OK** to return to the Rectangle/Line dialog box.

7. Use the following guidelines with the `Object Position` settings:

   - Choose `Float` to make the picture move relative to the size of the surrounding fields.
   - Choose `Fixed relative to top of band` to make the object stay in the position you give it in the Report Layout window, and to maintain that position relative to the top of the band.
   - Choose `Fixed relative to bottom of band` to make the object stay in the position you give it in the report layout window and maintain that position relative to the bottom of the band.

8. (Optional) Enter a comment in the `Comment:` field. Comments are for reference only and will not appear in the report.

9. Click **OK** to close the Rectangle/Line dialog box and return to the Report Generator screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Rectangle)<<1} To Draw a Rectangle:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Rectangle_with_Rounded_Corners)<<1} To Draw a Rectangle with Rounded Corners:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## To Draw a Rectangle in a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLPï¿½RPTX_Hint_for_To_Draw_a_Rectangle_in_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Click on the rectangle tool ( ● ) of the Report Generator toolbox.

2. Position the cursor where you want a corner of the rectangle to be.

3. Drag until the rectangle is the desired size, and release the mouse.

4. Double click one of the selected rectangle's sizing handles to open the Rectangle/Line dialog box.

5. Mark the `Print When` check box to open the Print When dialog box.

   The Print When dialog box allows you to establish exactly when and how the rectangle is printed in your report or label. See The Print When Dialog Box.

6. When satisfied with your selections in this dialog box, click **OK** to return to the Rectangle/Line dialog box.

7. Use the following guidelines with the `Object Position` settings:

   - Choose `Float` to cause the selected rectangle to be positioned relative to the size of the surrounding fields.
   - Choose `Fix Relative to Top of Band` to make the rectangle stay in the position you give it in the Report Generator layout screen and to maintain that position relative to the top of the band.
   - Choose `Fix Relative to Bottom of Band` to make the rectangle stay in the position you give it in the Report Generator layout screen and to maintain that position relative to the bottom of the band.

8. Use the following guidelines with the `Stretch Downward` settings:

   - Choose No stretch to prevent the rectangle from stretching vertically as the band stretches to display field data.
   - Choose Stretch relative to tallest object In group to cause the rectangle stretch to accommodate the tallest object in the group.
   - Choose Stretch relative to height of band to cause the rectangle stretch to fit in the band.

9. (Optional) Enter a comment in the `Comment:` field.

Comments are for reference only and will not appear in the report.

10. Click **OK** to close the Rectangle/Line dialog box and return to the Report Generator screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Vertical_or_Horizontal_Line)<<1} To Draw a Vertical or Horizontal Line:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Rectangle_with_Rounded_Corners)<<1} To Draw a Rectangle with Rounded Corners:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Draw a Rectangle with Rounded Corners in a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_To_Draw_a_Rectangle_with_Rounded_Corners_in_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Click the rounded rectangle tool ( ● ) in the Report Generator toolbox.
2. Position the cursor where you want a corner of the rounded rectangle to be.
3. Drag until the rounded rectangle is the desired size, and release the mouse.
4. To specify how rounded the corners of the rectangle are, double-click on the rectangle’s sizing handle.

   The Round Rectangle dialog box will open.

   The Round Rectangle dialog box contains the same options as the Rectangle/Line dialog box. In addition, the Round Rectangle dialog box contains a `Style:` option.
5. Click the `Style:` button that corresponds to the rounded rectangle shape you want.
6. Use the following guidelines with the `Object Position` settings:
   - Choose `Float` to cause the selected rectangle to be positioned relative to the size of the surrounding fields.
   - Choose `Fix Relative to Top of Band` to cause the rectangle to remain in the position you give it in the Report Generator layout screen and to maintain that position relative to the top of the band.
   - Choose `Fix Relative to Bottom of Band` to cause the rectangle to remain in the position you give it in the Report Generator layout screen and to maintain that position relative to the bottom of the band.
7. Use the following guidelines with the `Stretch Downward` settings:
   - Choose No stretch to prevent the rectangle from stretching vertically as the band stretches to display field data.
   - Choose Stretch relative to tallest object In group to cause the rectangle stretch to accommodate the tallest object in the group.
   - Choose Stretch relative to height of band to cause the rectangle stretch to fit in the band.
8. Mark the `Print When` check box to open the Print When dialog box.

The Print When dialog box allows you to establish exactly when and how the rounded rectangle is printed in your report or label. See The Print When Dialog Box.

9. When satisfied with your selections in this dialog box, click **OK** to return to the Text dialog box.

10. (Optional) Enter a comment in the `Comment:` field. Comments are for reference only and will not appear in the report.

11. Click **OK** to close the Rectangle/Line dialog box and return to the Report Generator screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Vertical_or_Horizontal_Line)<<1} To Draw a Vertical or Horizontal Line:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Rectangle)<<1} To Draw a Rectangle:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## Adding Pictures and Other Graphics to a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Adding_Pictures_and_Other_Graphics_to_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

You can use pictures and other graphics to illustrate reports, making them stand out with a unique look. Such graphics can be based either on the report itself, or on the data from individual records. For example, you might want to place a company logo on the title page or an illustrative graph in the report summary; these would be report-associated graphics. Or you might want to place photographs of contacts from each record included in the report into a contact list. These would appear as part of the listings in the detail band in the same way a text field would be listed.

Report-associated pictures are selected from files. Record-associated pictures are selected from OLE fields.

To add graphics to your report, you will use the OLE tool:

•

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_from_a_File_to_a_Report)<<1} To Add a Picture from a File to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_Field_to_a_Report)<<1} To Add a Picture Field to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Report_Generator_Picture_Attributes)<<1} To Change Report Generator Picture Attributes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Add a Picture from a File to a Report:

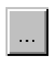
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Click the OLE tool on the Report Generator toolbox.

2. Position the cursor in the band where you want the picture to appear and drag until the picture frame is the desired size.

   The Report Picture dialog box will open.

   This dialog box allows you to specify the source of your picture, to adjust the picture to the frame, to position the picture, and to define when the picture will print.

3. Click the ellipsis (  ) button next to the **File** field.

   The Open dialog box will open.

4. Select the drive and directory where picture file is stored.

   A list of .BMP files will appear under `Select A Picture:`.

5. If you want to select a picture that is not a Windows Bitmap, use the `Files of Type:` to view a list of .ICO files.

6. Select the desired file.

   To preview the graphic, click **Preview**. The picture will appear in the `Preview Picture` box.

7. Choose **OK**.

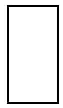
   The Picture dialog box will close. The picture file name will appear in the `File` text field in the Report Picture dialog box.

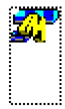
8. If the frame you have drawn for the picture is a different size from the actual picture, use the `If Picture And Frame Different Size` settings to tell TeleMagic how to deal with the picture. Use the following guidelines when making this setting:

   - Select `Clip Picture` if you want the picture cut to fit the frame. If the picture is bigger than the frame, `Clip Picture` will show a section of the original bitmap in the frame. The picture will be anchored at the top and at the left of the frame. You will not be able to see the lower right portion of the picture that extends beyond the frame.
   - Select `Scale Picture - Retain Shape` if you want to size the picture so that it does not extend beyond the size of the frame, while retaining its original

shape. The image will fill as much of the frame as possible while keeping the relative proportions of the bitmap picture. This will protect your picture from vertical or horizontal distortion.

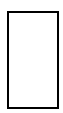
**Example:** If you insert a picture this size:

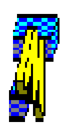
into a frame this size: 

the final picture will be this size: 

- Select `Scale Picture - Fill the Frame` if you want the picture to exactly fit the frame you have drawn. If the frame is a different shape and/or size from the picture, the picture will be resized and/or reshaped to fit the frame. If necessary, the picture will be distorted vertically or horizontally to fit the frame.

**Example:** If you insert a picture this size:

into a frame this size: 

the final picture will be this size: 

9. Click `Print When` to open the Print When dialog box. The Print When dialog box allows you to establish exactly when and how the picture is printed in your report. See The Print When Dialog Box for instructions on using this dialog box.

10. Use the `Position Relative To` setting to control what happens if the band in which you have placed the picture stretches (for example to accommodate field data):

- 
- Choose `Float` to cause the picture to move relative to the size of the surrounding fields.
- Choose `Fixed relative to top of band` to cause the picture to stay in the position you give it in the Report Layout window, and to maintain that position

relative to the top of the band.

- Choose `Fixed relative to bottom of band` to cause the picture to stay in the position you give it in the report layout window and to maintain that position relative to the bottom of the band.

11. You may enter a comment in the `Comment`: field. The comment will not appear in the report.

12. Choose **OK**.

    The picture will appear on the report page.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_Field_to_a_Report)<<1} To Add a Picture Field to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Report_Generator_Picture_Attributes)<<1} To Change Report Generator Picture Attributes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Add a Picture Field to a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_To_Add_a_Picture_Field_to_a_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Click the picture tool on the Report Generator toolbox.
2. Position the cursor in the band where you want the list of pictures to begin (normally, within the detail band), and drag until the picture frame is the desired size.

   The Report Picture dialog box will open.

   This dialog box allows you to specify the source of your picture, to adjust the picture to the frame, to position the picture, and to define when the picture will print.
3. Choose the `Field` radio button, then click the associated ellipsis ( ● ) button.

   The Choose Field/Variable dialog box will open.
4. From the Fields: list, double-click the name of the general field containing the information you want on your report.

**WARNING!** You will be able to select any field, even if it is not a general field. If you select a field that is not a general field you will receive a warning that the field must be a general field when you try to preview or print the report. You will not be able to preview or print the report.

5. Choose **OK**.

   The Choose a Field/Variable dialog box will close. The OLE field name will appear in the `Field` text box in the Report Picture dialog box.

   When the report prints, there is a very good chance that the pictures contained in the OLE fields for each record will be of varying sizes. Use the settings on this dialog box to control how the objects print.
6. If the frame you have drawn for the picture is a different size from the actual picture, use the `If Picture And Frame Different Size` settings to tell TeleMagic how to deal with the picture. Use the following guidelines when making this setting:

   - Select `Clip Picture` if you want the picture cut to fit the frame. If the picture is bigger than the frame, `Clip Picture` will show a section of the original bitmap in the frame. The picture will be anchored at the top and at the left of the frame. You will not be able to see the lower right portion of the picture that extends beyond the frame.
   - Select `Scale Picture - Retain Shape` if

you want to size the picture so that it does not extend beyond the size of the frame, while retaining its original shape. The image will fill as much of the frame as possible while keeping the relative proportions of the bitmap picture. This will protect your picture from vertical or horizontal distortion.

**Example:** If you insert a picture this size: ●

into a frame this size: ●

the final picture will be this size: ●

● Select `Scale Picture - Fill the Frame` if you want the picture to exactly fit the frame you have drawn. If the frame is a different shape and/or size from the picture, the picture will be resized and/or reshaped to fit the frame. If necessary, the picture will be distorted vertically or horizontally to fit the frame.

**Example:** If you insert a picture this size: ●

into a frame this size: ●

the final picture will be this size: 

7. Select `Center Picture` if you want to center a general field picture within the frame if it is smaller than its frame. (This option is only available if the picture is not scaled.) If you do not check `Center Picture`, and if the picture in a general field is smaller than the frame, it will snap to the upper left corner of the frame.

8. Mark `Print When...` to open the Print When dialog box. The Print When dialog box allows you to establish exactly when the picture is printed in your report. See The Print When Dialog Box for instructions on using this dialog box.

9. Use the `Object Position` setting to control what happens if the band in which you have placed the picture stretches (for example to accommodate field data):

   ● Choose `Float` to cause the picture move relative to the size of the surrounding fields.

   ● Choose `Fixed relative to top of band` to cause the picture to remain in the position you give it in the Report Layout window, and to maintain that position relative to the top of the band.

- Choose `Fixed relative to bottom of band` to cause the picture to remain in the position you give it in the report layout window and to maintain that position relative to the bottom of the band.

10. Choose **OK**.

    A “place holder” box showing the picture field location will appear on the report page.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_from_a_File_to_a_Report)<<1} To Add a Picture from a File to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Report_Generator_Picture_Attributes)<<1} To Change Report Generator Picture Attributes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Change Report Generator Picture Attributes:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. If you want to access the Report Picture dialog box to adjust the settings of an existing picture, simply double-click the picture.

   The Report Picture dialog box will open.

   This dialog box allows you to adjust the picture to the frame, to position the picture, and to define when the picture will print.

2. If the frame you have drawn for the picture is a different size from the actual picture, use the `If Picture And Frame Different Size` settings to tell TeleMagic how to deal with the picture. Use the following guidelines when making this setting:

•

- Select `Clip Picture` if you want the picture cut to fit the frame. If the picture is bigger than the frame, `Clip Picture` will show a section of the original bitmap in the frame. The picture will be anchored at the top and at the left of the frame. You will not be able to see the lower-right portion of the picture that extends beyond the frame.
- Select `Scale Picture - Retain Shape` if you want to size the picture so that it does not extend beyond the size of the frame, while retaining its original shape. The image will fill as much of the frame as possible while keeping the relative proportions of the picture. This will protect your picture from vertical or horizontal distortion.

  **Example:** If you insert a picture this size: •

  into a frame this size: •

  the final picture will be this size: •

- Select `Scale Picture - Fill the Frame` if you want the picture to exactly fit the frame you have drawn. If the frame is a different shape and/or size from the picture, the picture will be resized and/or reshaped to fit the frame. If necessary, the picture will be distorted vertically or horizontally to fit the frame.

  **Example:** If you insert a picture this size: •

  into a frame this size: •

the final picture will be this size: 

3. Click the `Print When...` button to open the Print When dialog box. The Print When dialog box allows you to establish exactly when the picture is printed in your report. See The Print When Dialog Box for instructions on using this dialog box.

4. Use the `Object Position` setting to control what happens if the band in which you have placed the picture stretches (for example to accommodate field data):

   - Choose `Float` to cause the picture move relative to the size of the surrounding fields.
   - Choose `Fixed relative to top of band` to make the picture stay in the position you give it in the Report Layout window, and to maintain that position relative to the top of the band.
   - Choose `Fixed relative to bottom of band` to make the picture stay in the position you give it in the report layout window and to maintain that position relative to the bottom of the band.

5. Select `Center Picture` if you want to center a picture within the frame if it is smaller than its frame. (This option is only available if the picture is not scaled.) If you do not check `Center Picture`, and if the picture is smaller than the frame, it will snap to the upper left corner of the frame.

6. Choose **OK**.

   The picture object will be adjusted accordingly.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_from_a_File_to_a_Report)<<1} To Add a Picture from a File to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_Field_to_a_Report)<<1} To Add a Picture Field to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

# Adding Fields Using Quick Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLPï¿½RPTX_Notes_and_Hints_for_Adding_Fields_Using_Quick_Reports)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

While it is possible to add fields to a report one at a time using the Field tool on the Toolbox, Quick Report allows you to quickly place multiple fields in the report all at once. You can easily specify which fields are to appear on your report, and how they should be arranged.

The Quick Report feature can be used to quickly "throw" a number of fields onto a blank report. These fields can be manipulated later, saving you time.

## To Use the Quick Report Feature:

1. From the **Reports** menu, select **Custom Report…**.

   The Custom Reports dialog box will open.

2. Select **Add**.

   The Custom Report dialog box will open.

3. Enter a name for the new report in the **Name** field. This is the name which will appear in the Custom Reports dialog box.

4. To change the file name of the report, enter the desired name in the **File Name:** field. This is the name that the report will be stored under on your disk drive.

5. Open the **Use Data From:** drop-down list and select the level from which the report will be generated.

**or** Select **Activities** from the drop-down list to generate an activity-based quick report.

6. Select the desired filter, if any, from the **Filter:** drop-down list.

7. Select the desired index, if any, from the **Index:** drop-down list.

8. To limit access to the report, mark the **Limit report access to certain users** checkbox.

   The Select Users mover box will open. Grant access to the appropriate users by moving them from the **Users Without Access** list to the **Users With Access** list. Click **OK** to accept the access list and close the Select Users mover box. To open this list in the future, click on the **Select Users** button.

9. Click **Edit**.

   The Report Generator will open.

10. From the **Report** menu, select **Quick Report**.

    An Open dialog box will open.

11. Use the Open dialog box to browse for the table on which to base the report and click **OK**.

    The Quick Report dialog box will open.

    You can arrange your fields horizontally or vertically.

12. Choose a field layout that suits your purposes from the `Field Layout:` buttons.

13. Click the `Fields...` button.

    The Field Picker dialog box will open with the fields in your database.

14. Using the `From Table:` list, select the source of the fields for your report.

- If you want to add a field from Level 1, Level 2, or Level 3 of your database to the report, choose `Contact1`, `Contact2`, or `Contact3`, respectively. To add an activity-based field to the report, choose `Activity`.

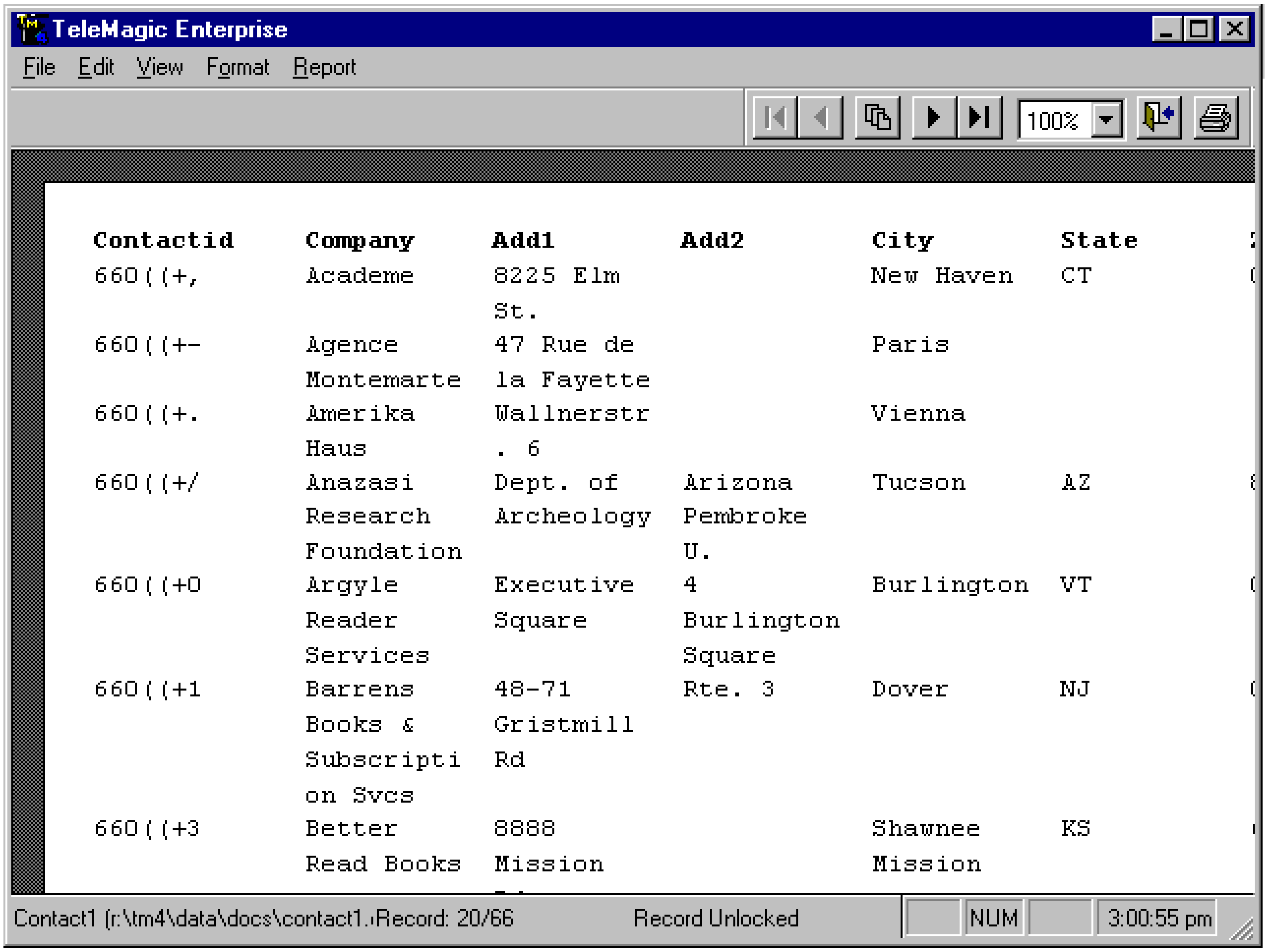
15. Scroll down the `All Fields:` list and double-click on each field you want in your report.

- **or** Highlight your desired field and click **Move**.

16. When you have completed your selection, click **OK**.

    Click **OK** again to close the Quick Report dialog box.

    You will be returned to the report generator, where you can further edit your report. The chosen fields will be added to the screen, along with their prompts and some page footer information:




**Sample Quick Report Result**

**(Your fields will be different)**

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Place_a_Field_in_a_Report)<<1} [Adding Individual Fields Using the Field Tool]

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} [Adding Objects to a Report]

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} [Working with Report Objects]

# Working with Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Working_with_Report_Objects)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½
ï¿½ )<<1}

Once you have added objects to your report, you can use Report Generator features to work with them, changing attributes and editing them as necessary.

When working with objects, most of the available options are activated from either the **Report** menu or the toolbars. You can also open a dialog box by double-clicking the object.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Selecting_Objects)<<1} Selecting Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Moving_Sizing_and_Deleting_Report_Generator_Objects)
<<1} Moving, Sizing and Deleting Report Generator Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Group_Ungroup)<<1} Group/Ungroup Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_the_Color_and_Fill_Patterns_of_Objects)<<1}
Changing the Color and Fill Patterns of Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Text)<<1} Working with Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Object_Placement_and_Alignment)<<1} Object Placement and Alignment

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Finalizing_the_Report)<<1} Finalizing the Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Sample_Reports)<<1} Sample Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Moving, Sizing and Deleting Report Generator Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

To Move an Object:
To Size an Object:
To Delete an Object:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# To Move a Report Object:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

- Click the object, and drag it to a new location.

  **or** Select the object and move it with the arrow keys. The arrow keys move the object one pixel at a time, which is useful for fine tuning object positions.

- When moving multiple objects, be sure the pointer is positioned on any selected object in the report layout window. Drag the objects to the desired location.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_To_Size_an_Object)<<1} To Size an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_To_Delete_an_Object)<<1} To Delete an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Size a Report Object:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_To_Size_a_Report_Object)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Select the object.
2. Point to one of its sizing handles and drag until the object is the desired size.

**or** Hold down the SHIFT key and press the ARROW KEYS until the object is the desired size.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Move_an_Object)<<1} To Move an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Delete_an_Object)<<1} To Delete an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# To Delete a Report Object:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

- To delete an object, select it and press BACKSPACE or DELETE.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Move_an_Object)<<1} To Move an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Size_an_Object)<<1} To Size an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## Group/Ungroup in the Report Generator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

You can turn a group of fields or other objects into a single object by using the **Format** menu's **Group** option; and change them back into individual objects by using the **Ungroup** option. When objects are grouped they can be moved, aligned, copied, sent to the back, or brought forward as with any single object.

To use this feature, simply select the objects you want to group (or the grouped object you want to break into component parts) and choose **Group** (or **Ungroup**) from the **Format** menu.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

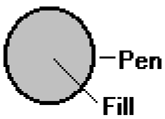
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Changing the Color and Fill Patterns of Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Most objects (with the exception of a line) consist of an outer edge and a center. The outer edge is called the pen. The center of the object is called the fill.




You are able to change the size and color of the pen for objects. You are also able to select a pattern and color for the fill of objects.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Choosing_a_Fill_Pattern_for_Objects)<<1} Choosing a Fill Pattern for Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Pen)<<1} Pen Style

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Fill_Color_and_Pen_Color)<<1} Fill Color and Pen Color

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

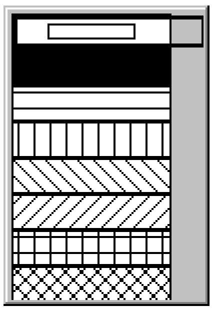
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Choosing a Fill Pattern for Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLPï¿½RPTX_Note_for_Choosing_a_Fill_Pattern_for_Report_Objects)
<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½
ï¿½ ï¿½ )<<1}

The **Fill** feature, accessed from the **Format** menu, lets you select a fill pattern for a square, a rectangle, a rectangle with rounded corners, or a circle. When you select **Fill** a sub-menu displaying available patterns will appear.



**Report Generator’s Fill Menu**

Select the desired pattern from this drop-down list.

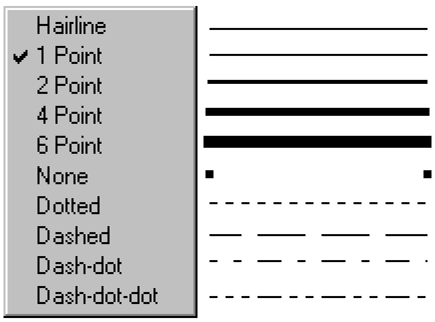
## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Pen)<<1} Pen Style
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Fill_Color_and_Pen_Color)<<1} Fill Color and Pen Color
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Choosing a Pen for Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Choosing_a_Pen_for_Report_Objects)<
<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½
ï¿½ ï¿½ )<<1}

The **Pen** option, accessed form the **Format** menu, brings up a sub-menu showing the different line styles you can use for your rectangle, rectangle with rounded corners, circle or line.




**Report Generator Pen Menu, With Examples**

Select the line style you want to use from the list.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Choosing_a_Fill_Pattern_for_Objects)<<1} Choosing a Fill Pattern for Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Fill_Color_and_Pen_Color)<<1} Fill Color and Pen Color

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Fill Color and Pen Color for Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

To change the color of the object's colors you will need to have the Color Palette toolbar open. If this toolbar is not open, click the Color Palette Toolabar button ( ) on the Report Designer toolbar.

## To change the object's colors

1. Select the object(s) to be edited.
2. Select the Foreground Color button ( ) to edit the text color of text objects, or the border (pen) color of non-text objects.

**or** Select the Background Color button ( ) to edit the fill color of non-text objects. (This button has no effect on text objects.)

**or** Select both buttons to edit both pen and fill colors of non-text objects. (Pen and Fill colors will be the same.)

3. Click the color of your choice from the palette.

## To select colors from the expanded palette

1. Click the Other Colors button ( ) on the Color Palette toolbar.

   The Color dialog box will open.
2. Click the color of your choice.
3. Click **OK**.

   The Color dialog box will close.

## To define and select a custom color

1. Click the Other Colors button ( ) on the Color Palette toolbar.

   The Color dialog box will open.
2. Click the **Define Custom Colors>>** button.

   The Custom Colors section of the Color dialog box will open.

3. Enter the color definition values in the `Hue:`, `Sat:`, `Lum:`, `Red:`, `Green:`, and `Blue:` textboxes.

**or** Click in the Spectrum box near the desired color.

4. Click and drag in the Spectrum slider to adjust the color.

5. Observe the example of the selected color in the `Color|Solid` box. When satisfied, click **Add to Custom Colors**.

The selected color will appear in the next `Custom Colors:` indicator. (The indicators are populated sequentially. If the next indicator is already populated, the old color will be replaced with the new value. The sequence begins with the upper-left indicator, or the selected indicator. If you select a new indicator, the sequence will restart at that point.)

6. Select the desired custom color from the `Custom Colors:` indicators.

7. Click **OK**.

The Color dialog box will close.

Custom colors will be retained until changed or deleted. Custom color settings are report-specific. You may have a different set of custom colors for each report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Choosing_a_Fill_Pattern_for_Objects)<<1} Choosing a Fill Pattern for Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Pen)<<1} Pen Style
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Working with Report Text

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Edit_Text)<<1} To Edit Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Font_or_Size)<<1} To Change Text Font or Size

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Object_Attributes)<<1} To Change Text Object Attributes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Text_Alignment)<<1} Changing Text Alignment

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Changing Report Text Alignment

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Select the text you want to align and choose **Format, Text Alignment** to bring up a sub-menu with options for justification and line spacing. Text alignment is called for when you want to format a text object that contains more than one word or paragraph.

See Report Generator Text Alignment for a text alignment example.

Text objects can be grouped with other types of objects, as well as with other text objects. These groups can then be aligned relative to each other in a variety of ways. For more information, see the Layout Tools topic for more information.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Edit_Text)<<1} To Edit Text

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Font_or_Size)<<1} To Change Text Font or Size

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Text_Object_Attributes)<<1} To Change Text Object Attributes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Arranging Multiple Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

If you have two or more objects that overlap, you can control how they are displayed.

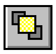
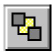
Bring to Front / Send to Back
Mode (Opaque or Transparent)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Bring to Front / Send to Back in the Report Generator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Bring_to_Front_Send_to_Back_in_the_Report_Generator)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

If two or more objects overlap, you can use these options to specify which should appear in front of the other(s). Select **Bring to Front** from the **Format** menu, or click the Bring to Front button (  ) from the `Layout` toolbar, to cause the selected object to be in front of any other objects. Select **Send to Back** from the **Format** menu, or click the Send to Back button(  ) from the `Layout` toolbar, to send the selected object behind other objects.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Mode)<<1} Mode (Opaque or Transparent)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Object_Placement_and_Alignment)<<1} Object Placement and Alignment

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

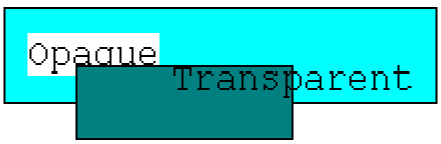
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Report Mode for Layered Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Report_Mode_for_Layered_Objects)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

If one object is in front of other objects, there are two possible modes for viewing them: transparent or opaque. The mode is changed via the **Mode** option on the **Format** menu. When you select **Mode**, a sub-menu will open where you can select **Opaque** or **Transparent**.

If an object is opaque, you cannot see any objects behind it; if it is transparent, you can. In the following illustration, the light colored rectangle is transparent and behind the other objects. The word ‘Opaque’ is an opaque text object between the light and dark rectangles. The dark rectangle is an opaque object between the two text objects. The word ‘Transparent’ is a transparent text object in front of the stack.




**Mode and Position Illustrated**

Notice the text objects. The text of a transparent object will be visible when in front of another object, but not the fill. The fill of an opaque object will be visible as well as the text. It is useful to consider a text object a rectangle containing opaque text. Therefore, the fill color of a transparent object is irrelevant unless the transparent object only partially overlaps another object.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Bring_to_Front_Send_to_Back)<<1} Bring to Front / Send to Back
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Object_Placement_and_Alignment)<<1} Object Placement and Alignment
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Report Object Placement and Alignment

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The importance of the alignment of objects in a report will vary depending on the report. Many times the only consideration will be whether or not the objects are in a straight line. Other reports, such as those designed to be printed on forms, require precise placement of objects. The Report Generator lets you view the exact placement of objects, and to create an invisible grid to help in alignment.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Show_an_Objects_Position)<<1} Show an Object's Position

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Ruler_and_Grid_Settings)<<1} Changing Ruler and Grid Settings

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Center)<<1} Center

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Arranging_Objects_on_the_Page)<<1} Arranging Multiple Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Show a Report Object's Position

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

By selecting **Show Position** from the **Report** menu, you will change the information that displays on the status bar on the lower left-hand side of the screen. Generally, this shows information about the current environment settings; with **Show Position** activated it shows the exact position of the cursor at any given time:


**Status Bar with *Show Position* Activated; No Object Selected**

When you select an object in this mode, its exact position is given. This can be very useful when you need to align several objects.


**Status Bar with *Show Position* Activated; Object Selected**

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Ruler_and_Grid_Settings)<<1} Changing Ruler and Grid Settings

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Center)<<1} Center

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Arranging_Objects_on_the_Page)<<1} Arranging Multiple Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Changing Report Ruler and Grid Settings

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Choosing **Set grid scale…** from the **Format** menu brings up the Set Grid Scale Dialog Box.

This dialog box allows you to control the density of your grid and unit of measurement of your ruler.

The `Grid in pixels:` section consists of two fields:

- The `Horizontal:` field determines the spacing between horizontal gridlines. This affects the behavior of objects when the Snap to Grid feature is activated.

- The `Vertical:` field determines the spacing between vertical gridlines. This also affects the behavior of objects when the Snap to Grid feature is activated.

Both of these fields are expressed in pixels, regardless of ruler setting.

The `Ruler Scale` section allows two choices:

- Select System default to set the rulers to the system selected in your operating system settings (normally U.S. or Metric). To change this to another system, see your operating system documentation.

- Select Pixels to set the rulers to pixels.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Activating_Snap_to_Grid)<<1} Activating Snap to Grid
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Align_to_Grid)<<1} Align to Grid
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______153.BMP<JumpId(TM.HLPï¿½RPT3_Show_an_Objects_Position)<<1} Show an Object's Position
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Arranging_Objects_on_the_Page)<<1} Arranging Multiple Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

## Activating Snap to Grid in the Report Generator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Snap to Grid can be activated and de-activated by choosing **Snap to Grid** from the **Format** menu. Turn this feature on if you want to have all objects automatically align to the lines of an invisible grid. For fine-tuning object placement, turn this feature off by returning to the **Format** menu and choosing **Snap to Grid** again.

See Changing Ruler and Grid Settings for a description of how to set the spacing of this grid.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Align_to_Grid)<<1} Align to Grid

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Align to Grid in the Report Generator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Use the **Object** menu's **Align to Grid** option to align quickly selected objects to the invisible grid that is defined with the **Report** menu's **Ruler/Grid** option.

This option is not the same as the **Report** menu's **Snap to Grid** option. **Align to Grid** works only on specifically selected objects, and can be used regardless of whether **Snap to Grid** has been activated or not.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Ruler_and_Grid_Settings)<<1} Changing Ruler and Grid Settings

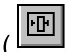
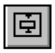
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Activating_Snap_to_Grid)<<1} Activating Snap to Grid

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

# Center Report Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Select an object and choose **Format, Align** to cause that object to be centered horizontally on the page or within its column. The object can also be centered vertically within the band. The same effect can be achieved with the Center Horizontally (  ) and Center Vertically (  ) buttons on the `Layout` toolbar.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Show_an_Objects_Position)<<1} Show an Object's Position

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Ruler_and_Grid_Settings)<<1} Changing Ruler and Grid Settings

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Arranging Multiple Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

# Advanced Report Features

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

In addition to the standard report features of placing and arranging objects on the report page, the Report Generator offers two advanced options: data grouping and variables. Data grouping allows you to arrange your data in groups and to create totals and sub-totals with those groups. Variables allow you to include system information in your report. These features can be used to increase the power of your reporting capabilities.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Data_Grouping)<<1} Data Grouping
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Variables)<<1} Variables
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Create_a_New_Memory_Variable)<<1} To Create a New Report Memory Variable:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Finalizing_the_Report)<<1} Finalizing the Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Sample_Reports)<<1} Sample Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

# Report Data Grouping

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Report_Data_Grouping)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Within a report, you may want to arrange data into groups. While you can use the initial Custom Report dialog box to set a filter or index for the report, the **Data Grouping** option can particularly enhance the organization of your report.

Grouping data means arranging information to be printed in sub-sets. For example, you might want to print sales prospect lists grouped by region, state, or ZIP code, that is, with all of the sales prospects in the same region appearing together.

When data are grouped, each set has a group header printed before it and a group footer printed after it. The information that is to be printed in front *of* the group should be placed in the group header band. This information is usually explanatory in nature. Group footer information is placed in the group footer band and typically consists of summaries or subtotals. For example, if you grouped a contact list by zip code, you might want to include the total number of contacts for each zip code area in a group footer.

## To Include a Data Group in Your Report:

1. From the **Report** menu, select **Data Grouping**.

**or**

Click the **Data Grouping** button ( ) from the Report Designer toolbar.

The Data Grouping dialog box will open.

●

2. Click the ellipsis button ( ● ) in the Group Expression window.

   The Report Generator Expression Builder will open, allowing you to define the group.

●

3. Select the field you want to group from the `Fields:` list.

   **Example:** If you are creating a report based on the Documentation database and want all of the contacts for each company to be grouped together, select `Contact1.company`.

4. Click **OK** to exit the Expression Builder.

   You will return to the Data Grouping dialog box.

6. Use the `Group properties` section to control what happens when the group or page changes.

●

   - If you are using two or more columns in your report, select `Start group on new column` if you want to begin each group at the top of a new column. (This option will be dimmed if you are using a single column.)

- Select Start each group on a new page if you want to begin each new group at the top of a new page.
- Select Reset page number to 1 for each group if you want to begin each new group on a new page, and reset the page numbering to 1 for each new group.
- If you will be including a group header and want it to appear at the top of each new page, select Reprint Header on Subsequent Pages. The header will be printed at the beginning of each new group, and at the top of each page.
- If you want to prevent the group header from printing on the bottom of a page by itself and the group data all appearing on the next page, enter a measurement in the Start group on new page when less than the number in the spinner field. (The measurement is in the same units as the Report Generator rulers.) If the space below the header is smaller than the specified measurement, the header will be moved to the top of the next page.

7. Use the **Mover Button** () to change the order in which the groups will appear.

8. Add a new group before an existing group by selecting the existing group and clicking **Insert**.

9. Delete an existing group by highlighting it and clicking **Delete**.

10. When satisfied with your group settings, click **OK**.

    A group header and group footer band will be added to the report.

11. Adjust the size of the group header and/or footer band by dragging the band to a new height.

12. Enter header and/or footer text into the appropriate band using the Text tool on the toolbox. (See Adding and Editing Text for more information on using the Text tool.)

For an example of how to use the grouping feature, see To Create a Sample Report with Data Groupings.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1}

# Report Variables

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Report_Variables)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

There are two types of information from TeleMagic that you can include in a report: field information and variable information. Field information simply pulls data from a TeleMagic field. The data that is generated depends entirely on what is in the field at the time the report is printed. Variable information is information that will change depending on the circumstances. For example, a User ID will vary depending on who is logged into TeleMagic at the time the report is printed. The Expression Builder comes with a selection of standard variables that allow you to place information such as the User's ID, the writer's name, standard addresses, database names, and current filter in headers, footers, titles, or summaries.

In addition to these standard variables, you can create your own variables. These variables allow you to create an expression and have that expression accessible later in the `Variables:` list. You can use it to combine existing variables and fields, and perform calculations on fields or existing variables.

The **Variables** option on the **Reports** menu allows you to create new memory variables that can be used as part of expressions in your report.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Create_a_New_Memory_Variable)<<1} To Create a New Memory Variable:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_the_Variable_to_a_Report)<<1} To Add the Variable to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

# To Create a New Report Memory Variable:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_To_Create_a_New_Report_Memory_Variable)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. From the **Report** menu, select **Variables**.

   The Report Variables dialog box will open.

•

2. In the highlighted box under `Variables:`, enter a name for the variable.

3. Click the ellipsis button ( • ) next to the **Value to Store:** field to open the Report Generator Expression Builder. Build the expression on the same value you want to base the variable on. (See The Expression Builder Dialog Box for more on building expressions in the Report Generator.)

4. When you finish creating the expression, click **OK**.

   The Initial Value is the startup value of the variable; it will change as soon as the variable is calculated. The initial value is 0 by default. You can enter a different starting value, or create an expression that will return an initial value based on other information in TeleMagic.

5. If you want to change the initial value, click the ellipsis button next to the **Initial Value:** field to open the Expression Builder dialog box. When you finish creating the expression, click **OK**.

6. Mark the **Release after report** checkbox to release the report variable from memory after the report is printed. If this option is not selected, the variable remains available in memory until you exit TeleMagic.

7. The **Reset at:** drop-down list allows you to specify the point at which the variable is reset to its initial value. By default, End of Report is displayed in the list box. You can also select End of Page or End of Column. If you have specified groups in a report in the Data Grouping dialog box, the Reset box displays an item for each group in the report.

8. Select a type of calculation to perform from the **Calculate** section. The variable begins calculating with its initial value, and continues until it is reset to this initial value. The following options are available:

   - Select **Nothing** and no calculations will be made on this variable.
   - Select **Count** to count the number of times a variable is printed per group, page, column, or report (depending on your selection in the Reset box). The

calculation is based on the number of times the variable occurs, not on the variable's value.

- Select **Sum** to compute the sum of the variable's values. This option keeps a running total of the variable values for a group, page, column, or report (depending on your selection in the Reset box).
- Select **Average** to compute the arithmetic mean (average) of the variable values within a group, page, column, or report (depending on your selection in the Reset box).
- Select **Lowest** to display the lowest value that occurred in that variable for a group, page, column, or report (depending on your selection in the Reset box). Places in the variable the value of the first record in the group. When a lower value is encountered, the variable's value changes accordingly.
- Select **Highest** to display the highest value that occurred in that variable for a group, page, column, or report (depending on your selection in the Reset box). Places in the variable the value of the first record in the group. When a higher value is encountered, the variable's value changes accordingly.
- Select **Std**. **Deviation** to return the standard deviation of the values in a group, page, column, or report (depending on your selection in the Reset box).
- Select **Variance** to measure the degree to which individual field values vary from the average of all the values in the group, page, column, or report (depending on your selection in the Reset box).

9. Click **OK** to save the variable and exit the Report Variables dialog box.

   The variable will now be available at the bottom of the list of Variables in the Expression Builder dialog box. From here you can either add it directly to the screen, or use it in other expressions.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_the_Variable_to_a_Report)<<1} To Add the Variable to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Variables)<<1} Variables

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

## To Add the Variable to a Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Click the Field tool.
2. Click in one of the report bands.

   The Report Expression dialog box will open.
3. Click the ellipsis button ( ● ) next to the **Expression** field.

   The Expression Builder will open.
4. Scroll to the variable you want to include. New variables are added to the top of the list.
5. Double-click the variable.

   It will appear in the `Expression for Field on Report` window.
6. Click **OK**.

   You will return to the Report Expression dialog box.
7. Click **OK**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Variables)<<1} Variables
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Create_a_New_Memory_Variable)<<1} To Create a New Memory Variable:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

# Finalizing the Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

When you have finished adding the report, you should take a moment to review it to make sure that you have included all of the needed information and that the layout will produce the desired results. You can review the appearance of the report by selecting **File, Print Preview**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT1_Page_Preview)<<1} Page Preview

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Saving Reports and Exiting the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT4_Sample_Reports)<<1} Sample Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

# Saving Reports and Exiting the Report Generator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

After you have laid out your report, you can preview your work to see how it will look when printed.

## To Save a Report and Exit the Report Generator:

1. From the **File** menu, select **Close**.

   You will be prompted to save the report.

2. Choose **Yes**. (To exit without saving, choose **No**. To return to your report without saving, choose **Cancel**.)

   The Report Layout window will close.

3. From the Custom Report dialog box, choose **OK**.

   The Custom Report dialog box will close. The report name will appear in the Custom Reports selection box.

4. From the Custom Reports selection box, choose **Close**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|CONTDN01.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1}

# Working with Existing Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

## Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1} Printing Custom Reports and Quick Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Modifying_Existing_Custom_Reports_and_Quick_Lists)<<1} Modifying Existing Custom Reports and Quick Lists

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Copying_Reports_and_Quick_Lists_from_Another_Database)<<1} Copying Reports and Quick Lists from Another Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Delete_a_Custom_Report_or_Quick_List)<<1} To Delete a Custom Report or Quick List:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Reports_Menu_Configuration)<<1} Reports Menu Configuration

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Bands_in_the_Report_Generator)<<1} Bands in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Report_Setup)<<1} Report Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3__Advanced_Report_Features)<<1} Advanced Report Features

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Finalizing_the_Report)<<1} Finalizing the Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Sample_Reports)<<1} Sample Reports

# Printing Custom Reports and Quick Lists

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLPï¿½RPTX_Note_for_Printing_Custom_Reports_and_Quick_Lists)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ï¿½ï¿½ )<<1}

## To Print a Custom Report or Quick List:

1. From the **Reports** menu, select **Custom Reports** or **Quick Lists**.

2. Highlight the report or quick list that you want to print and click **Print**.

   The Print Custom Contact Report or Print Quick List dialog box will appear.

   The name of the report will automatically be entered into the `Report:` field. The index and filter that were selected when the report was created will appear in the `Index:` and `Filter:` fields.

3. If you want to change the default filter, select it from the `Filter:` drop-down list. (Not applicable to Quick Lists.)

4. If you want to change the default index, select it from the `Index:` drop-down list. (Not applicable to Quick Lists.)

5. Select `Current Record Only` to print the report using only the record currently open in the Contact Manager. Selecting this option will cause the previously set filter to be ignored. The `Filter:` and `Index:` options will dim.

6. Select `All Children of Current Record` if you want to print all of the children of the current record. When this check box is selected, TeleMagic will disregard the previously selected filter and print only the child records of the record currently displayed in the Contact Manager. The `Filter:` and `Index:` options will dim.

7. If you want to preview the report prior to printing, choose **Preview**. (Not applicable to Quick Lists.)

   The Report Generator Page Preview window will open. (For instructions on using the Page Preview window, see the Page Preview topic.)

8. When you satisfied with your choices, click **Print**.

   The Print dialog box will open.

9. Click **OK** to print the report.

**or** If you want to print the report in landscape view, choose **Setup** from the Print dialog box.

The Print Setup dialog box will open.

10. Under `Orientation`, choose the `Landscape` radio button.

11. Choose **OK**.

12. At the Print dialog box, choose **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Printing an Activity-Based Custom Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. From the **Reports** menu, select **Custom Reports**.
2. Highlight the activity-based report or quick list that you want to print and click **Print**.

   The Print Custom Activity Report dialog box will appear.

   The name of the report will automatically be entered into the `Report:` field.
3. Click **Set Activity Filter** to create a filter for the report.

   The Activity Filter dialog box will open.

   The `Activities assigned to:` list allows you to include activities in the report that belong to users who have granted you either full access or rights to view full details of their calendars.
4. Click on any users whose activities you want included in the report. An X will appear beside the users' names. (Click on that user's name again to remove the X.)
5. To filter the activities included in the report by activity type, enter the type in the `Activity type:` field. (Make sure you use the exact spelling, including capitalization, for the activity type as it is used in the list box attached to the `Type` field in the Activity Manager, or press F2 to select the type from the list box.)
6. To filter the activities included in the report by the contents of the activity's `Status` field, enter the status in the `Activity Status:` field. (Make sure you use the exact spelling, including capitalization, for the activity status as it is used in the list box attached to the `Status` field in the Activity Manager, or press F2 to select the status from the list box.)
7. Use the radio buttons to filter on completion status:
   - Select `All Activities` if you want all activities included, regardless of completion status.
   - Select Completed Only if you would only like to include activities that have been completed.
   - Select Pending Only if you would only like to include activities that have not been completed.
8. To include To-Dos in the report for the selected user(s), mark the `To-Do's` check box.
9. To filter the activities by priority, unmark the priority check box (`Priority one`, `Priority two`, `Priority`

three, or No Priority) for any priority you do not want included in the report. If a check box is not marked, any activities having that priority will not be included in the report.

If you have selected All Activities or Pending Only in step 8, the Due Date/Time Range section will be available.

10. To filter activities by their due date and time, enter a date range under Due Date/Time Range in the Start Date and End Date fields; and a time span in the Start Time and End Time fields. (Leave these fields blank if you do not want to filter by due date or time.)

    If you have selected Completed Only in step 8, the Completion Date/Time Range area will become available.

11. To filter your completed activities by completion date and time, enter a date range under Completion Date/Time Range in the Start Date and End Date fields; and a time span in the Start Time and End Time: fields. (Leave these fields blank if you do not want to filter by completion date or time.)

12. When satisfied with your selections, choose **OK**.

    You will be returned to the Print Custom Activity Report dialog box.

    The Index field will display the index that was selected when the report was created.

13. To change the default index, select it from the Index: drop-down list.

14. To preview the report prior to printing, choose **Preview**.

    The Report Generator Page Preview window will open. (For instructions on using the Page Preview window, see the Page Preview topic.)

15. When satisfied with your selections, click **Print**.

    The Print dialog box will open. You can adjust your printer settings here. Your exact options will depend on your hardware.

16. Click **OK** to print the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

______154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Modifying Existing Custom Reports and Quick Lists

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Once you have saved a report format, you can modify it. When you modify a report, you can permanently change the original report, or you can keep the original and modify a copy.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_a_Custom_Report_or_Quick_List)<<1} To Change a Custom Report or Quick List:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Modify_a_Custom_Report_or_Quick_List_and_Keep_the_Original)<<1} To Modify a Custom Report or Quick List and Keep the Original:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# To Change a Custom Report or Quick List:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLPï¿½RPTX_Note_for_To_Change_a_Custom_Report_or_Quick_List
)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½
ï¿½ ï¿½ )<<1}

1. From the **Reports** menu, select **Custom Reports** or **Quick Lists**.

   The Custom Reports or Quick List selection box will appear.

2. Select the report you want to modify.

3. Choose **Change**.

   The Custom Report or Quick List dialog box will open. (If you are changing a custom report, you may edit any information on this dialog box with the exception of the actual report file name.)

4. Make any necessary adjustments on this screen.

5. If you are modifying a custom report, choose **Edit**.

   The Report Generator will open.

**or** If you are modifying a quick list, click **Fields**.

6. Make any necessary changes to the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Modify_a_Custom_Report_or_Quick_List_and_Keep_the_Original)<<1} To Modify a Custom Report or Quick List and Keep the Original:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# To Modify a Custom Report or Quick List and Keep the Original:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. From the **Reports** menu, select **Custom Reports**.

   The Custom Reports selection box will appear.

2. Select the report you want to modify.

3. Choose **Copy**.

   The Copy Report dialog box will open.

4. Choose **Copy**.

   The Copy Report dialog box will close. The copied report name will appear in the Custom Reports selection box.

5. Choose **Change**.

   The Custom Report dialog box will open.

6. Choose **Edit**.

   The Report Generator will open.

7. Edit the report as necessary.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_a_Custom_Report_or_Quick_List)<<1} To Change a Custom Report or Quick List:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# To Delete a Custom Report or Quick List:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

1. From the **Reports** menu, select **Custom Reports** or **Quick Lists**.

   The Custom Reports or Quick List selection box will appear.

2. Highlight the report you want to delete and click **Delete**.

   A message will appear asking you to confirm your decision to delete.

3. Click **Yes** to delete the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Copying Reports and Quick Lists from Another Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Part of the flexibility of custom reports and quick lists is that you are not limited to using only Contact Key Fields when reporting, as you are with standard reports. When creating custom reports, you can select any field in the database. Because of this, custom reports are database-specific. If you have created a report in one database, it will not automatically be accessible in any other databases. TeleMagic does, however, give you the option of copying a report from a different database, and using it (where possible) in the current database. Often, the differences in structure between two databases will mean that a report created in one will be useless in another; but with some adaptation, you may find that one report can serve the same purpose in several different databases. It is recommended that you give some thought to how and where you will be using a report before creating it. Remember, you can always go back and edit a report at any time.

## To Copy a Custom Report or Quick List from Another Database:

1. From the **Reports** menu, select **Custom Reports** or **Quick Lists**.

   The Custom Reports or Quick Lists selection box will appear.

2. Choose **Copy**.

   The Copy Report (or Copy Quick List) dialog box will open.

3. Drop the `Database:` list, and choose the source database.

4. Drop the `Report:` (or `Quick List`) list, and choose the report you want copied.

5. Choose **Copy**.

   The copied report (or quick list) will appear in the Custom Reports (or Quick Lists) selection box.

6. If you want to change the item now, highlight it and choose **Change**.

   The Custom Report or Quick List dialog box will open.

7. Choose **Edit** to modify a custom report.

- **or** Choose **Fields…** to modify a quick list.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

______154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Sample Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Sample_Reports)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Three sample reports have been included with TeleMagic. Each of these reports illustrate some of the reporting features available in the Report Generator. These reports can be modified so you can experiment with different layouts and features.

You may find one or more reports in this collection that are applicable to your own reporting needs. The Copying Reports and Quick Lists from Another Database topic contains procedures that should simplify moving the sample reports into your database. Once copied, you will be able to modify the report to better suit your needs.

## Sample Reports

The first sample report is designed to show the current account status of each company in the Documentation database. It illustrates the following features:

Adding fields to reports

Adding pictures to reports

Adding text to reports

Adding a title to a report

Setting up page layout

Previewing a report

To create this report, see: To Create a Sample Account Status Report:

The second sample report demonstrates the Quick Report feature of the Report Generator, and gives some layout tips:

How to move/align objects

How to draw lines

How to change the amount of space given to a record

To create this report, see: To Create a Sample Quick Report on Account Representatives:

The third sample report shows how to use one of the more powerful features of the Report Generator, Data Grouping. This feature allows you to make sub-groups of information in your report. (For example, you could use data grouping to create a report on the number of contacts each account rep has in each state, and group those contacts by ZIP code area.) The data grouping example shows all contacts in the Documentation database grouped by company.

To create this report, see: To Create a Sample Report with Data Groupings:

These examples are intended to provide an alternate means of exploring the Report Generator features. The Report Generator streamlines the report development process. It is not difficult to use, but it does differ from most other business software. The sample reports allow a convenient means of demonstrating the uses of the many controls available with this feature.

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CONTDN01.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1}

# To Create a Sample Account Status Report:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLPï¿½RPTX_Note_for_To_Create_a_Sample_Account_Status_Report)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

This report will list the account status of all U.S. companies in the Documentation database. It will show each company's logo, name, headquarters location, CEO and, of course, account status. Each page of the report will be numbered.

1. From the **Reports** menu, select **Custom Reports**.

   The Custom Reports selection box will appear.

2. Click **Add**.

   The Custom Report dialog box will open.

3. In the `Name:` field, type the report name as you want it to appear in the Custom Report selection box.

   **Example:** Company List

4. In the `Filename:` field, either accept the auto-generated name, or rename the report.

5. From the `Use Data from:` list select `Company`.

6. From the `Filter:` list select `US Companies`.

7. From the `Index:` list select Account Representative.

8. Click **Edit**.

   The TeleMagic Report Generator will open.

9. From the **File** menu, select **Page Setup**.

   The Page Setup dialog box will open.

10. Click **Print Setup**.

    The Print Setup dialog box will open.

11. Under `Orientation`, choose `Portrait`.

12. Under `Paper`, select the 8 ½" x 11" paper size from the `Size` list box (if it is not already selected).

13. Click **OK**.

    The Print Setup dialog box will close, returning you to the Page Setup dialog box.

14. Click **OK**.

    The Page Setup dialog box will close.

15. From the **Report** menu, select **Default Font**.

The Font dialog box will open.

16. From the `Font` list, choose `Times New Roman`.

17. From the `Font Style` list, choose `Regular`.

18. From the `Size` list, choose `10`.

    TeleMagic will use this font for all printed text, unless you specify otherwise for a specific piece of text.

19. Click **OK**.

    The Report Font dialog box will close, returning you to the Report Layout window. We will now give our report a title page.

20. From the **Report** menu, select **Title/Summary**.

    The Title/Summary dialog box will open.

21. Mark the `Title Band` checkbox.

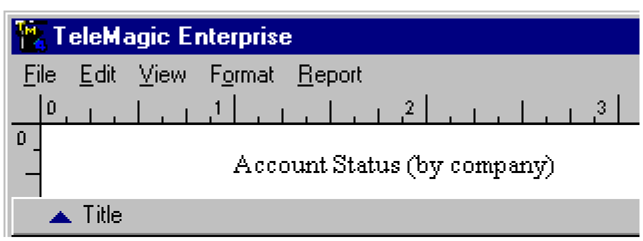
22. Click **OK**.

    A `Title` band and band separator will appear on the Report Generator Layout window:

23. Choose the text tool on the Report Controls toolbar.

24. Move your mouse pointer into the `Title` band. The pointer will display as a text insertion point. Click where you want the title to begin, and type the report title.

    **Example:** Account Status (by Company):




**Sample Title Band with Report Title**

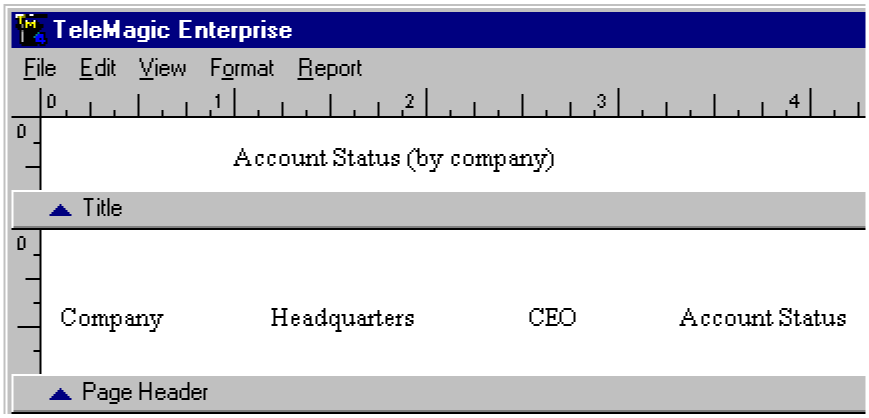
We will now add a set of headers that will appear on each individual page.

25. Click the text tool on the Report Controls toolbar.

26. Move your mouse pointer into the `Page Header` band. The pointer will display as a text insertion point. Click where you want the header to begin, and type the header contents. If you want to be able to move parts of a header independently, re-click the text tool before typing each part.

    **Example:** Company Headquarters CEO Account

Status:




**Sample Page Header Band with Page Headers**

We will now add the fields that will contain the data shown in the report.

27. Click the field tool in the Report Generator toolbox.

28. Move your mouse pointer into the `Detail` band. The pointer will display as a crosshair.

●

29. Click where you want the field to appear, and drag the field to the desired size.

    The Report Expression dialog box will open.

30. Click the ellipsis button ( ● ) next to the **Expression:** field.

    The Report Generator's Expression Builder dialog box will open.

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31. In the `Fields`: list, double-click the Company field.

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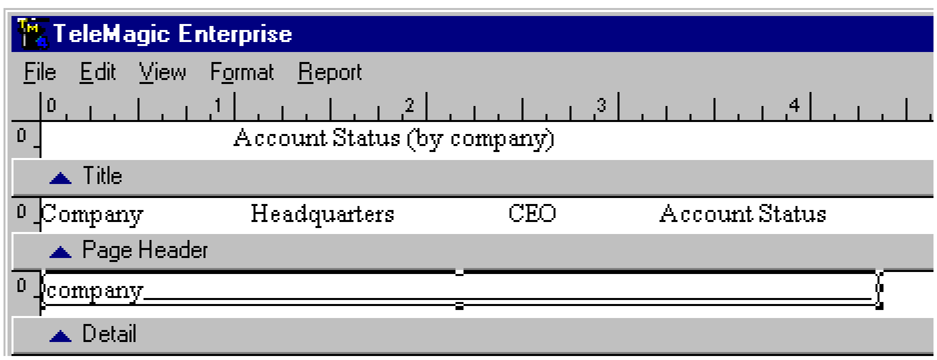
The field name will appear in the `Expression for Field on Report:` text box.

32. Click **OK**.

    The Expression Builder dialog box will close.

33. In the Report Expression dialog box, click **OK**.

    The Report Expression dialog box will close. The field will appear on the Report Layout window:




**Sample Report Layout Window, with "Company" Field in Detail Band**

- 

34. Repeat steps 28 to 33 for `city` (Headquarters); `off1` (CEO); `acctstatus` (Account Status).

35. Click the picture tool on the Report Generator toolbox.

    We will be using two types of graphics to illustrate this report. In the detail band, we will place the field that contains the logo for each company, while on the title page of the report (i.e., in the title band) we will place an illustration that is not related to any contact, and will only appear once in the report.

36. Position the cursor at the top left corner of the `Detail` band, and drag until the picture frame is the desired size.

    The Report Picture dialog box will open.

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32.dll,
BlueS

This dialog box allows you to specify the source of your picture, adjust the picture to the frame, position the picture, and define when the picture will print.

kyHelpButton, g<procedup.bmp| proceddn.BMP<JumpId(TM.HLP>secondï¿½RPT3_To_Change_Report_Generator_Picture_Attributes)<<1}

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp| proceddn.BMP<JumpId(TM.HLP>thirdï¿½RPT4_The_Print_When_Dialog_Box)<<1}

37. Choose the `Field` radio button, then click the ellipsis button ( ● ) next to the **Field:** text box.

    The Choose Field/Variable dialog box will open.

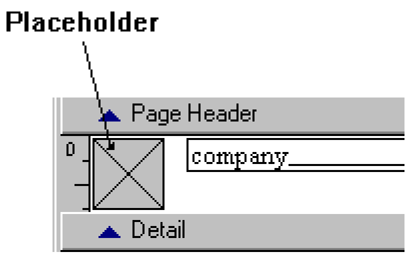
38. From the `Fields:` list, scroll down to locate the `logo` field and double-click.

39. Click **OK**.

    The Choose a Field/Variable: dialog box will close. The OLE field name will appear in the `Field` text box in the Report Picture dialog box.

40. Click **OK**.

    A “place holder” box showing the picture field location will appear on the report page:




**Sample Detail Band with Picture Field Added**

We will now add a picture to the title band of our report. This picture will not change from record to record.

41. Click the picture tool on the Report Generator toolbox.

42. Position the cursor at the top left corner of the new picture location, and drag until the picture frame is the desired size.

    The Report Picture dialog box will open.

43. Click the ellipsis button ( ● ) next to the **File** text box.

    The Open dialog box will open.

44. Select the location of your TeleMagic common directory from the `Look in:` drop-down list.

    **Example:** F:\TM4\COMMON

    The available file list will appear in the dialog box’s main text display.

45. Select the TM.BMP sample file.

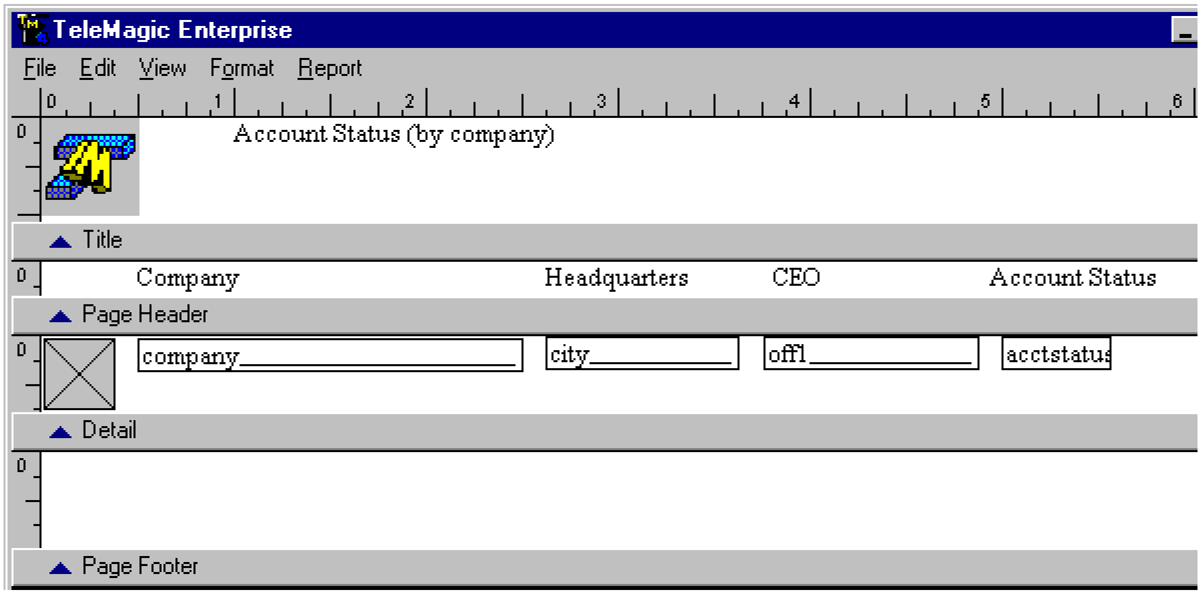
    The picture will appear in the `Preview Picture` box.

46. Click **OK**.

    The Picture dialog box will close. The picture file name will appear in the `File` text box in the Report Picture dialog box.

47. Click **OK**.

    The picture will appear on the report page:




**Sample Title Band with Picture**

The report is now complete.

48. If you want to preview the report, choose **Report**, **Page Preview**, and see To Preview a Report.

49. To close the report, choose **File**, **Close**.

    You will be prompted to save your changes.

50. Click **Yes**. (To exit without saving, click **No**. To return to your report without saving, click **Cancel**.)

    The Report Layout window will close. You will then be asked if you want to save the environment.

51. Click **No**. (This is a FoxPro feature that is not necessary at this point. TeleMagic will automatically save your environment information for you.)

52. From the Custom Report dialog box, click **OK**.

    The Custom Report dialog box will close. The report name will appear in the Custom Reports selection box.

53. From the Custom Reports selection box, click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_To_Create_a_Sample_Quick_Report_on_Account_Representatives)<<1} To Create a Sample Quick Report on Account Representatives:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_To_Create_a_Sample_Report_with_Data_Groupings)<<1} To Create a Sample Report with Data Groupings:

# Creating a Sample Quick Report on Account Representatives:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

## To Create a Sample Quick Report on Account Representatives:

1. From the **Reports** menu, select **Custom Reports**.

   The Custom Reports selection box will appear.

2. Click **Add**.

   The Custom Report dialog box will open.

3. Enter a name for the report in the `Name:` field.

4. From the `Use Data from:` list, choose `Company`.

5. From the `Filter:` list, choose `No Filter`.

6. From the `Index:` list, choose `Company Name`.

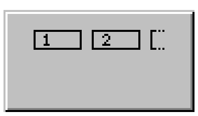
7. Click **Edit**.

   The Report Generator will open.

8. From the **Report** menu, select **Quick Report**.

9. A Windows Open dialog box will open. Locate the database you are basing the report on. In this example, select /DATA/DOCS/CONTACT1.DBF.

   The Quick Report dialog box will open.

10. Choose 

. (This button is selected by default.)

110 Click the `Fields...` button.
.

   The Field Picker dialog box will open.

12. Double-click the `company` field in the `All Fields:` list on the left.

**or** Select the `company` field and click **Move**.

   The `company` field will appear (showing its database level as the first part of its name)
   in the `Selected Fields:` list.

13. From the `From Table:` list box, choose `Contact2`.

14. Scroll down the `All Fields:` list for `Contact2`, until you find `acctrep`.

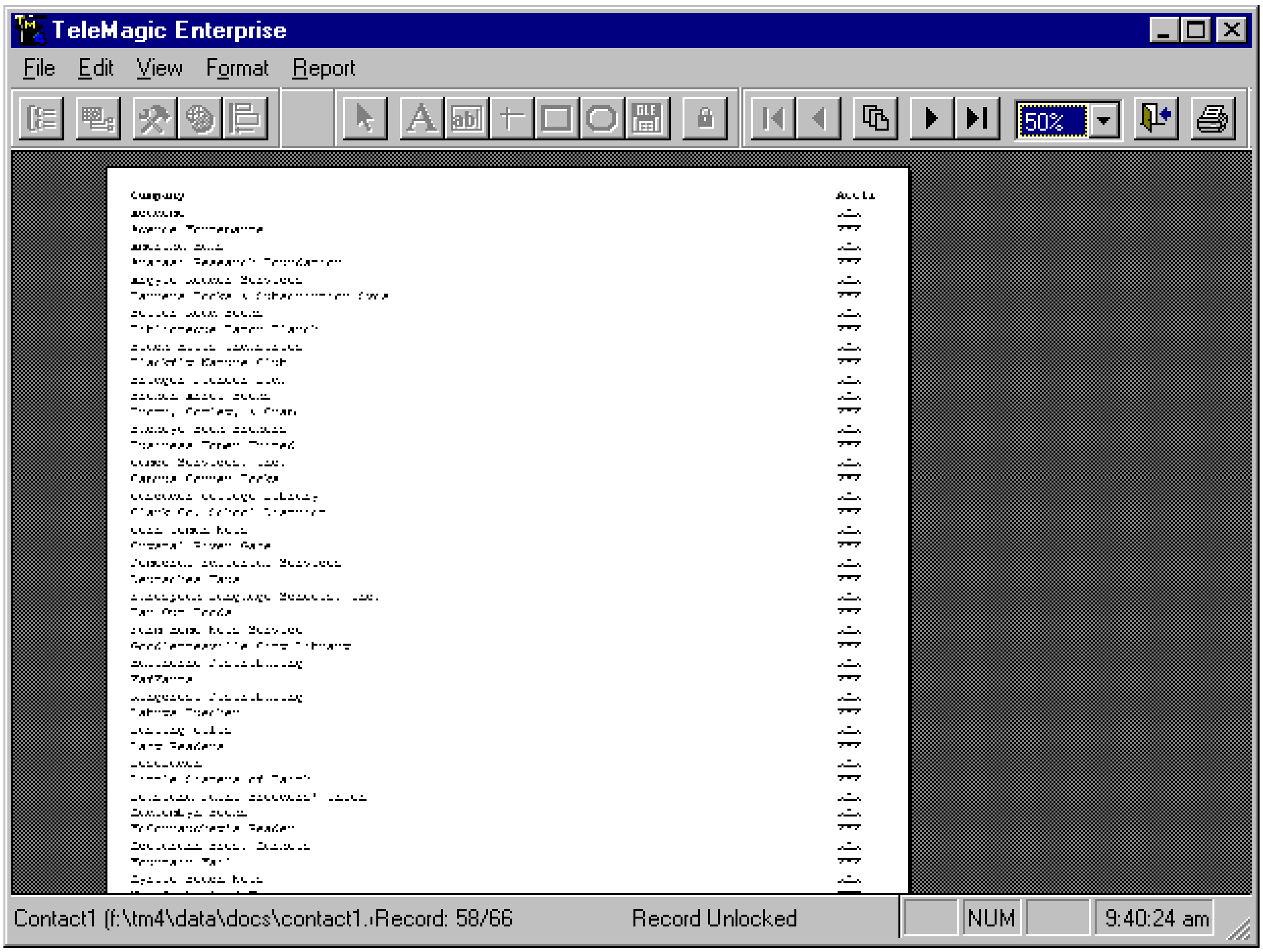
15. Select `acctrep` as you did with `company`. It will appear

in the `Selected Fields:` list.

16. Click **OK**.
17. At the Quick Report dialog box, click **OK**.

    The Report Generator window will become active again, showing the quick layout you have chosen, with some default settings.

18. From the **File** menu, select **Print Preview**.




**Preview of Quick Report, displaying Two Fields**

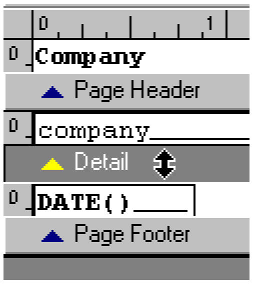
**(This graphic has been modified from the default for clarity.)**

19. Click Close Preview  to return to the Report Generator window.
20. If you are happy with the report layout as it now stands, see Saving Reports and Exiting the Report Generator.

**or** If you want to make some cosmetic changes, continue with the next step.

**Example:** We will bring the two fields closer together and draw a line underneath each pair for the sake of clarity.

21. Click anywhere on the `Detail` band separator bar. The cursor will change to a double-headed arrow, and the separator bar will change color:




22. Drag the cursor down the screen one quarter inch or so.

    The Detail band will be lengthened:

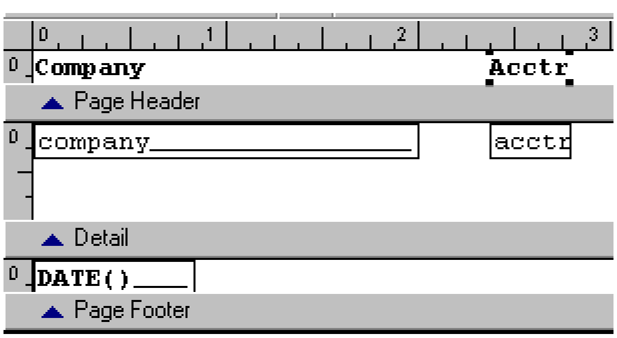
23. Select the `company` field.

    Note that when selected, it displays *handles* (small boxes) on each of its corners and sides.

24. Point to its rightmost handle and drag to the left until the field is as small as you want it to be.

25. Select the `acctrep` field and drag it closer to the `company` field:

26. Select the `acctr` field title from the `Page Header` band, and move it to a position above the `acctrep` field:




27. Double-click the line tool ( ● ) from the Report Controls toolbar. Draw one line under the two fields in the `Detail` band, and another under the two headings in the `Page Header` band.

28. From the **File** menu, select **Print Preview**.

    Note that the list is now easier to read.

29. Click Close Preview  to exit preview mode.

30. To close the report, choose **File**, **Close**.

    You will be prompted to save your changes.

31. Click **Yes**. (To exit without saving,
    click **No**. To return to your report without saving, click
    **Cancel**.)

32. From the Custom Report dialog box,
    click **OK**.

    The Custom Report dialog box will close. The report
    name will appear in the Custom Reports selection box.

33. From the Custom Reports selection box, click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_To_Create_a_Sample_Account_Status_Report)<<1} To Create a Sample Account Status Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_To_Create_a_Sample_Report_with_Data_Groupings)<<1}
To Create a Sample Report with Data Groupings:

## To Create a Sample Report with Data Groupings:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Grouping data means arranging information to print it in sub-sets. For example, you might want to print sales prospect lists grouped by region, state, or ZIP code. You can add up to 20 groupings to a report.

1. From the **Reports** menu, select **Custom Reports**.

   The Custom Reports selection box will appear.

2. Click **Add**.

   The Custom Report dialog box will open.

3. Enter a name for the report in the `Name:` field.

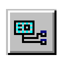
4. From the `Use Data from:` list, choose `Contact`.

5. From the `Filter:` list, choose `No Filter`.

6. From the `Index:` list, choose any index.

7. Click **Edit**.

   The Report Generator will open.

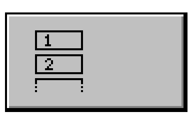
8. Click the Data Environment button. 

   The Data Environment dialog box will open.

9. From the **Report** menu, select **Quick Report**.

   A Windows Open dialog box will open. Locate the database you want to base the report on. For this example, select /DATA/DOCS/CONTACT1.DBF.

   The Quick Report dialog box will open.

10. Choose 

.

11. Click the `Fields...` button.

    The Field Picker dialog box will open.

12. From the `From Table:` list box, choose `Contact1`.

13. Double-click the `company` field in the `All Fields:` list box on the left.

**or** Select the `company` field and click **Move**.

14. The company field will appear in the `Selected Fields:` list box.

15. Repeat the previous step for the fields: `add1`, `add2`, `city`, `state`, and `zip`.

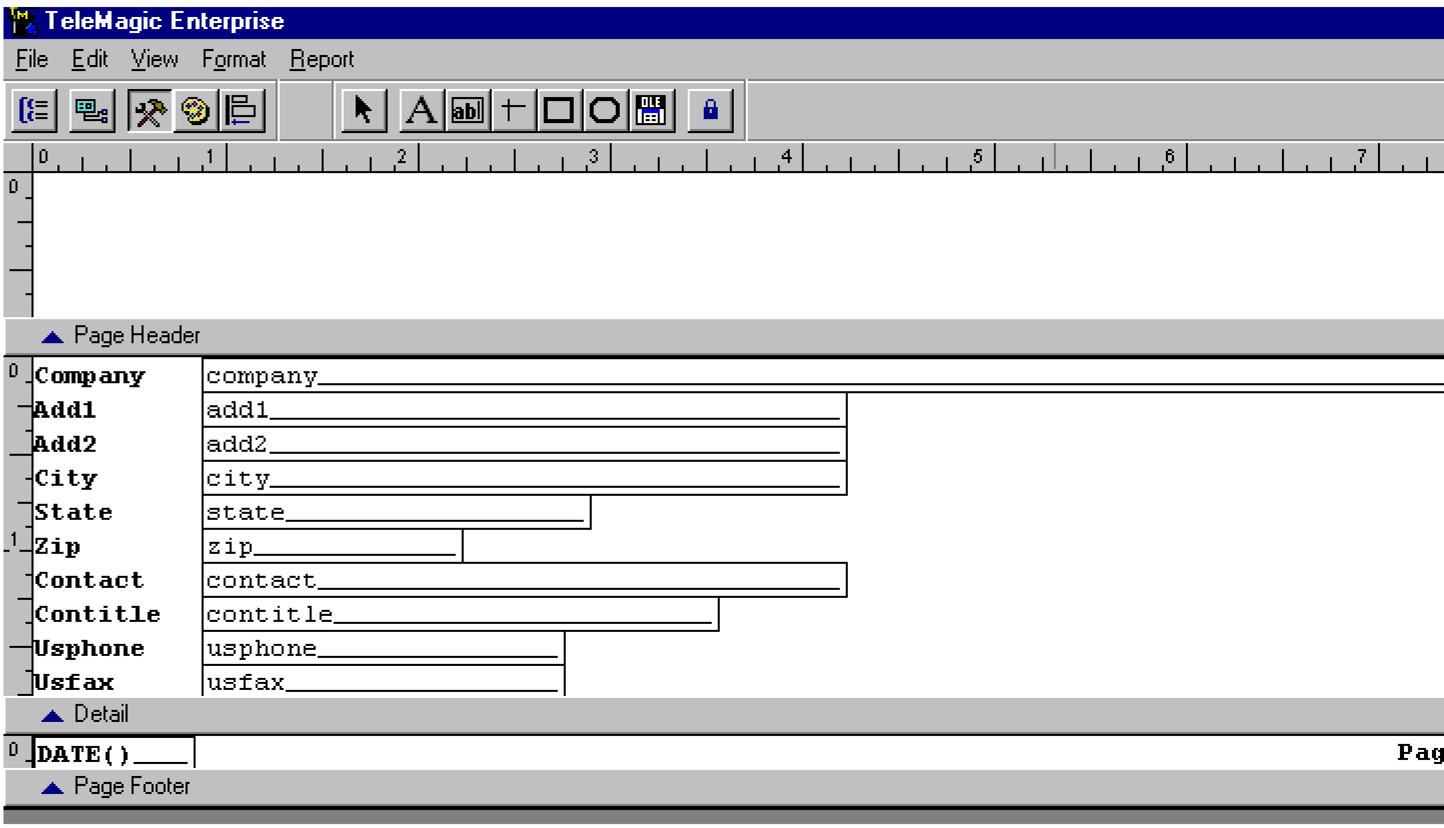
16. From the `From Table:` list box, choose `Contact2`.

17. From the `All Fields:` list for `Contact2`, choose the fields `contact`, `contitle`, `usphone`, and `usfax`.

18. Click **OK**.

19. At the Quick Report dialog box, click **OK**.

    The Report Generator window will open, showing all the selected fields.




20. Click on the Data Grouping button. ●

**or** From the **Report** menu, select **Data Grouping**.

The Data Grouping dialog box will open.

21. Click the ellipsis button ( ● ) next to the selected expression box.

    The Report Generator Expression Builder will open, allowing you to define the group.

    If you need to find out more about using this Expression Builder, see The Expression Builder Dialog Box.

22. In the `Fields:` list, locate the `company` field and double-click it.

23. Click **OK** to exit the Expression Builder.

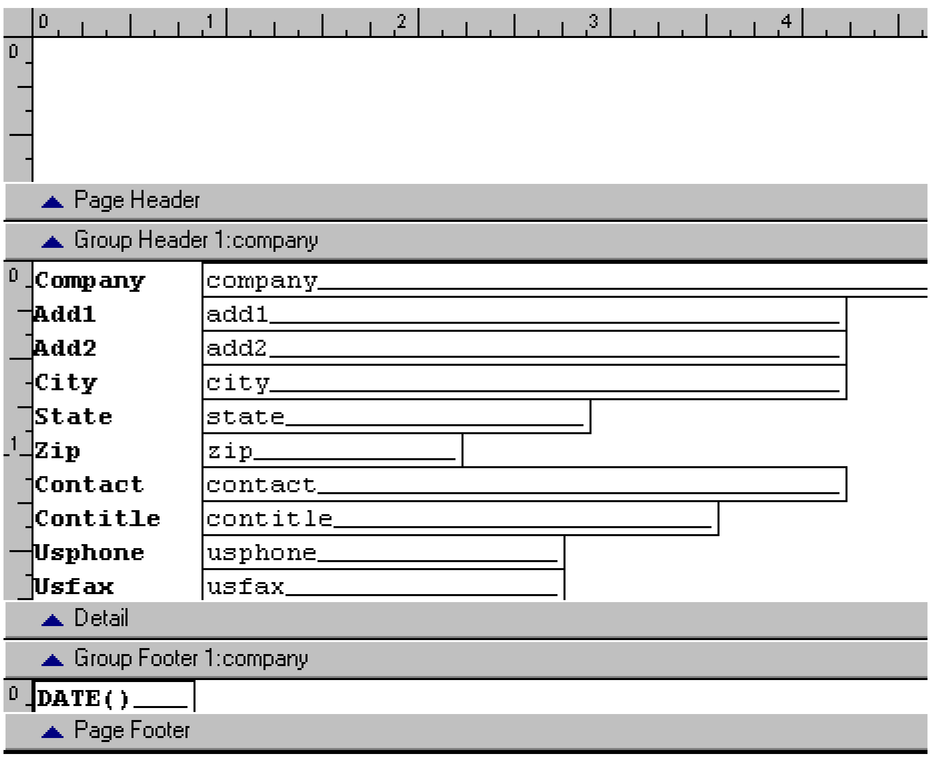
24. In the Group Info dialog box, mark the `Start Each Group on a New Page` check box.

    This will ensure that a new page is started every time a group begins.

25. Mark the `Reprint Group Header on Each Page` check box if you want the group header to be repeated on each page.

26. Click **OK** to close the Data Grouping dialog box.

    The Report Layout window will now display a group header and group footer band:




**Report Layout Window, Showing New Group Header and Footer Bands**

Make the Group Header band about 1.25" high by clicking

on the
divider, and
dragging
the cursor
toward the
bottom of
the
window.

27. Click the Selection tool.

28. Select the fields that are company-related, and move them to the `Group Header` band. You can move the fields individually or all at a time by selecting the fields and holding down the SHIFT key.

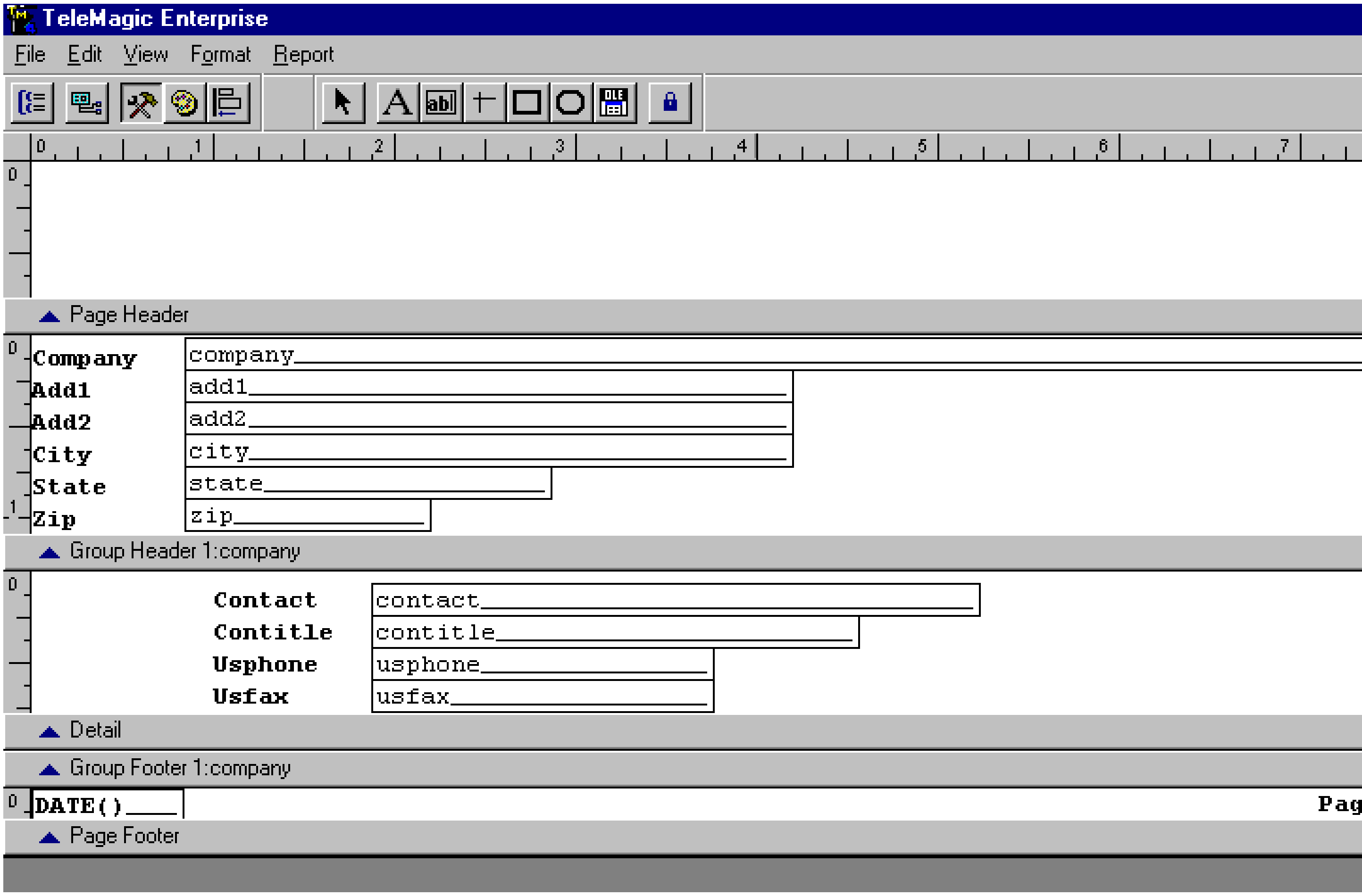
    The `Detail` band will now be half empty.

29. Move the remaining fields in the `Detail` band towards the top of the band by selecting them and dragging them to the new position.

30. Use the same method to indent them one inch from the left edge of the band.

31. Adjust the height of your `Detail` band so that the objects in it fit exactly.

    Your screen should now look something like this:




32. Make the `Group Footer` band about .5" high by clicking anywhere on the divider, and dragging the cursor toward the bottom of the window.

33. Click the field tool.

34. Click in the `Group Footer` band.

    The Report Expression dialog box will open.

35. Click **Expression**.

    The Expression Builder will open.

36. In the `From Table:` list, double-click the field named `contact2.contact`.

    It will appear in the `Expression for Field on Report:` text box.

37. Click **OK**.

38. At the Report Expression dialog box, mark the `Calculations` check box.

    The Calculate Field dialog box will open.

39. Choose the `Count` radio button.

40. Click **OK**.

41. At the Report Expression dialog box, click **OK**.

    The `contact` field will appear in the Group Footer band.

42. Click the text tool.

43. Click in the `Group Footer` band.

44. Type: `Total Number of Contacts at this Company:`

45. Arrange the two objects in the `Group Footer` band so that they look like this:

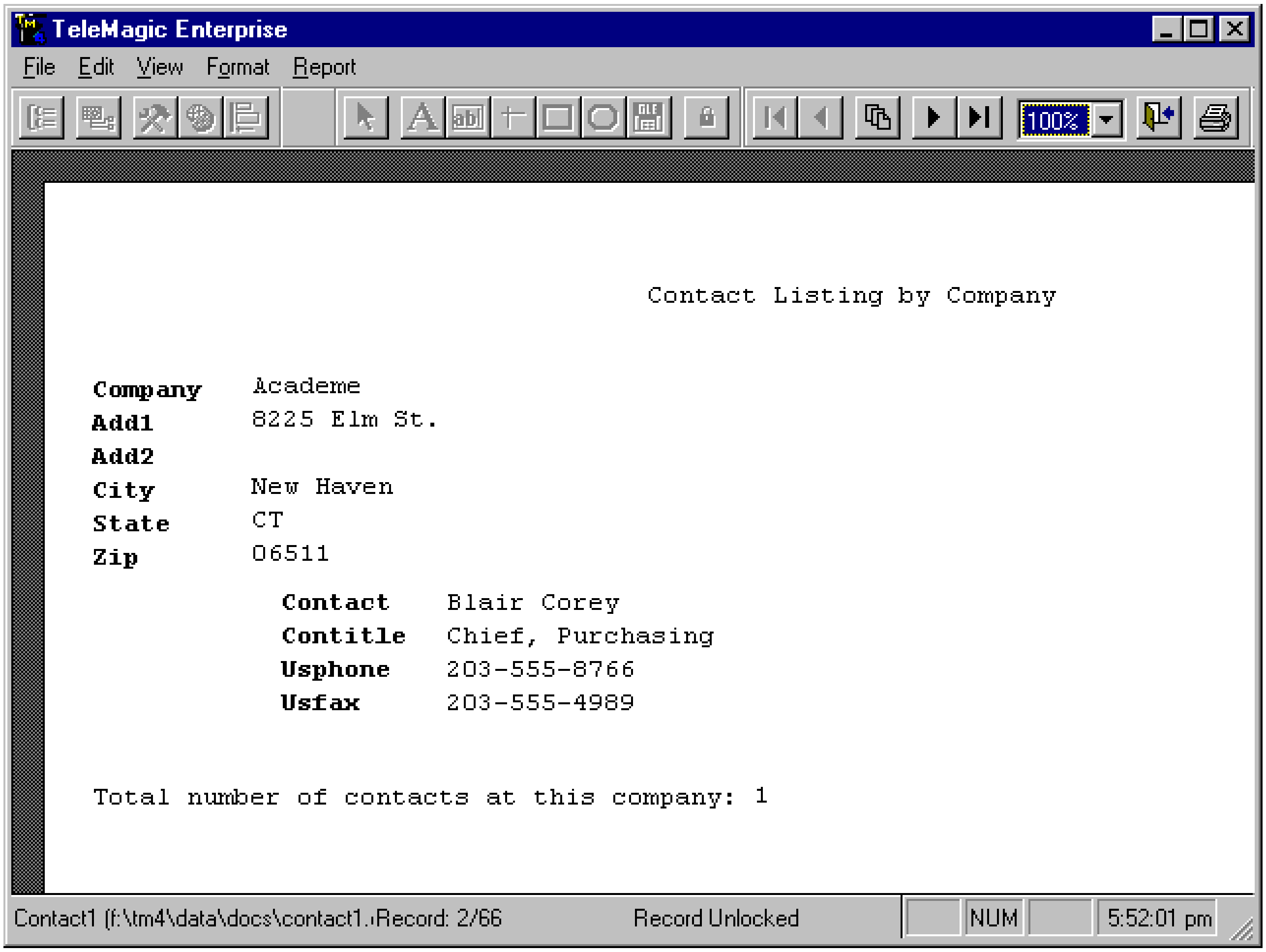

**Sample Group Footer Band**

46. Click the text tool.

47. In the `Page Header` band, type a name for the report.

    **Example:** `Contact Listing By Company`

48. From the **File** menu, select **Print Preview**.




**Sample Page Preview Showing Grouped Data**

lThe group header information is displayed at the top of the list of contacts; and at the bottom of the group the total number of records in the group is displayed.

49. Click Close Preview ● to exit preview mode.

50. To close the report, choose **File**, **Close**.

    You will be prompted to save your changes.

51. Click **Yes**. (To exit without saving, click **No**. To return to your report without saving, click **Cancel**.)

    The Report Layout window will close.

52. From the Custom Report dialog box, click **OK**.

    The Custom Report dialog box will close. The report name will appear in the Custom Reports selection box.

53. From the Custom Reports selection box, click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_To_Create_a_Sample_Account_Status_Report)<<1} To Create a Sample Account Status Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_To_Create_a_Sample_Quick_Report_on_Account_Representatives)<<1} To Create a Sample Quick Report on Account Representatives:

# Reports Menu Configuration

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Hint_for_Reports_Menu_Configuration)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

As you create your reports and become familiar with those offered with TeleMagic, you may want to customize the menu to include those reports that you use frequently. By configuring your **Reports** menu, you can make it easier to print reports, labels, envelopes and even quick lists. Instead of having to open several dialog boxes each time you need to print a list or report, you can simply select that report from the **Reports** menu.

## To Configure Your Reports and Write Menus:

1. From the **Reports** menu, select **Configuration**.
2. The Report Menu Configuration dialog box will open, showing on the right your current `Report Menu`, and on the left the `Custom Reports` and `Quick Lists` available to you.
3. To configure the `Reports Menu`, scroll through the `Custom Reports` and `Quick Lists` selection boxes until you find the item you want to add to the menu.
4. To add an item, double-click on it.

   Your selection will appear as the last entry in the `Report Menu` configuration list box on the right-hand side of the screen.
5. To add lines to the menu, click on the **Line** button.
6. To move the report to another position on the menu, highlight it on the list and click the button to the left of the report.

   A double-headed arrow will appear on the button.
7. Drag the item to the desired position, and drop it there.
8. To remove an item from the list, highlight it and click **Remove**.

   The item will be moved back to the list on the left.
9. To save your changes and exit the Report Menu Configuration dialog box, click **OK**. To exit without saving your changes, click **Cancel**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Existing_Reports)<<1} Working with Existing Reports

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Common Report Generator Dialog Boxes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_The_Print_When_Dialog_Box)<<1} The Print When Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Adding_Activity_Fields)<<1} The Report Expression Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_The_Expression_Builder_Dialog_Box)<<1} The Expression Builder Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_The_Calculate_Field_Dialog_Box)<<1} The Calculate Field Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_The_Expression_Format_Dialog_Box)<<1} The Expression Format Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_The_Expression_Builder_Options_Dialog_Box)<<1} The Expression Builder Options Dialog Box
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# The Report Generator Print When Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Marking the `Print When` check box within many of the Report Generator's dialog boxes opens the Print When dialog box.

The Print When dialog box allows you to establish exactly when text and other objects are printed in your report.

In the **Print repeated values** section:

- Choose `Yes` to display repeated values.
- Choose `No` to suppress repeated values.

In the **Also Print** section:

- Select `First whole band of new page/column` Prints the field in the first band of a new page or column that is not an overflow from a previous page or column. This box is automatically enabled if you check `Yes` for **Print repeated values**, and optional if you check `No` for **Print repeated values**.
- Select `When this group changes` to print the field when the chosen group changes. This option is available only if a data group exists and you choose a data group from the list box. This option is only available if you are using data grouping in your report. See the Data Grouping topic.
- Select `When detail overflows to new page/column` to print the field when the Detail band overflows to a new page or a new column.

Mark the `Remove line if blank` checkbox to collapse the band if an object is not printing and no other object is occupying the same horizontal space.

Enter an expression in the `Print only when expression is true` field to print the field only if specific conditions are met. An expression can also be developed using the Expression Builder. Access the Report Generator Expression Builder dialog box by clicking the ellipsis ( ● ) button next to the `Print only when expression is true` field. For more information on the Expression Builder, see the Expression Builder topic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Common_Report_Generator_Dialog_Boxes)<<1} Common Report Generator Dialog Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# The Report Expression Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_the_Report_Expression_Dialog_Box)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

Your report can include fields, variables, calculated values, calculated fields, or user-defined functions. The Report Expression dialog box is used to define what information is included.

Click the ellipsis button ( • ) next to the **Expression:** field to open the Expression Builder. Using the Expression Builder you can define what fields, functions, and variables you want to use. For more information on using the Expression Builder, see The Expression Builder Dialog Box.

The ellipsis button next to the **Format:** field becomes available when you have created a valid expression in the Expression Builder that is displayed in the `Expression` field. Selecting the **Format:** ellipsis button opens the The Report Generator Expression Format Dialog Box dialog box that allows you to specify the format for the field.

The `Field Position` radio buttons of the Report Expression dialog box allow you to control the position and characteristics of the field in its band.

- Select `Float` to position the field based on the positions of surrounding fields.
- Select Fix relative to top of band for the field to remain in the position you give it in the Report Designer and maintain that position relative to the top of the band.
- Select Fix relative to bottom of band for the field to remain in the position you give it in the Report Designer and maintain that position relative to the bottom of the band.

Mark the `Stretch with overflow` checkbox to cause the field to expand down the report page to display all data in the field or expression.

**WARNING!**

Some of your data could be overwritten during printing if:

- You position a field relative to the bottom of the band and include below this field another field that is positioned relative to the top of the band and can stretch.
- You position a field relative to the top of the band and include above this field another field that is positioned relative to the top of the band and can stretch.

Click `Calculations...` to open the Calculate Field dialog box. The Calculate Field dialog box allows you to select a mathematical operation to create a computed field.

Click the `Print When` button, to open the Print When dialog box. The Print When dialog box allows you to specify conditions that must be met for the field to be printed.

Enter comments in the `Comment`: field. Comments will not be displayed in the report.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Common_Report_Generator_Dialog_Boxes)<<1}

Common Report Generator Dialog Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# The Report Generator Expression Builder Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Expression Builder dialog box consists of four major elements: The `Expression for Field on Report:` field, the `Functions` section, the `Fields` list, and the `Variables` list.

## Expression for Field on Report

The `Expression for Field on Report:` field contains the expression that will determine the contents of the field being edited. You may enter the expression directly in the `Expression for Field on Report:` field, or you can double-click any item from any of the other lists in the Expression Builder and it will appear in this field. Functions and operators can be edited in this field as necessary.

Semicolons (;) and commas (,) can be included in field definitions to trim (remove trailing spaces) and connect several character expressions: Placing a comma between character expressions in a report field trims the value of the expression preceding the comma, inserts an intervening space, and connects the value of the expression following the comma. If the value of the expression to be trimmed is all blanks, that value and the intervening space are omitted and only the value of the expression following the comma is displayed. Placing a semicolon between character expressions in a report field causes the value of the expression preceding the semicolon to be trimmed and, provided the trimmed value has a length greater than zero, causes the value of the expression following the semicolon to be printed on a new line.

## Functions

The `Functions` section contains four drop-down lists: `String`, `Logical`, `Math`, and `Date`. As you scroll through the options on these drop-down boxes, a brief description of each option appears in the status bar at the bottom of the screen. If you want to see a more detailed description of each option in these list boxes, see Expression Builder..

## Fields

The `Fields:` list displays the fields in the active table. To move a field into the expression box, double-click on it.

The name of the active table appears in the `From Table:` list.

To choose fields from another table, select the table name from the `From Table:` pop-up list. When you select a table, the fields for that table are displayed in the `Fields` list.

## Variables

The `Variables:` list displays the available system memory variables.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_The_Report_Generator_Expression_Builder_Dialog_Box_System_Variables)<<1}

When creating custom report formats, you may want to place information such as User IDs, the writer's name, standard addresses, database names, and current filter in headers, footers, titles, or summaries. To do this, you can use Variables to put "place holder" calculated fields where you want this information to appear. When you do this, you will not have to adjust this information manually whenever you print the report. The pertinent data will be placed automatically by TeleMagic. These are some of the more common variables and their uses:

| **Variable** | **Information Appearing in Report** |
|---|---|
| **cUserID** | The three character user ID of the person currently logged into TeleMagic |
| **cUserName** | The user name of the person currently logged into TeleMagic |
| **cCurDB** | The name of the current database |
| **cDir_Database** | The directory for the current database |
| **cDir_Global** | The TeleMagic global directory, where all TeleMagic files are located. |
| **cContLevel** | The controlling level of contact data (1, 2, or 3) as defined in Contact preferences. |
| **cCurLevel** | The currently selected level of contact data (1, 2, or 3) |
| **cContact [1][3]** | The names of the contact levels of the current database. |
| **cStndAddr [1]** | The expression for the first line of the standard address defined in Database preferences. (See the Database Preferences topic.) |
| **cStndAddr [2]-[5]** | The expression for the second through fifth lines of the standard address |
| **cCurFilter** | The name of the current filter |
| **_Pageno** | Inserts the page number into the report. |

The following variables do not appear in the Expression Builder variable list, but can be used in the Report Generator:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_The_Report_Generator_Expression_Builder_Dialog_Box_Custom_Variables)<<1}

| Variable | Information in Report |
|---|---|
| **SafeEval( <dbase expression> )** | Evaluates the given dBase expression **(<value to return if expression fails>)** and returns the result. If the expression fails (because of an error in the syntax, for example) the second parameter is returned as is. Note that a memo field cannot be the second parameter. |
| **TimeFmt( <time in 24 hour format> )** | Changes the time to whatever format is in your preferences; returns character string |
| **TimeFmt( <time in 24 hour format>, 12 or 24 )** | Changes the given time to the format **TimeMins( <time in any format> )** Converts time to minutes since midnight; returns number |
| **TimeMins( <minutes since midnight> )** | Converts minutes since midnight to 24 hour format; returns character |

Once your expression is complete, click the **Verify** button to make sure that the expression is valid.

To change the what is available in the Expression Builder dialog box, click **Options…** to open the The Expression Builder Options Dialog Box .

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Common_Report_Generator_Dialog_Boxes)<<1} Common Report Generator Dialog Boxes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# The Report Generator Calculate Field Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Reportsï¿½ ï¿½ ï¿½ )<<1}

The Calculate Field dialog box allows you to select a mathematical operation to create a computed field.

The `Reset:` list allows you to specify the point at which the value for this field will be set to zero.

- If you choose `End of Report`, the field is calculated one time at the end of the report without being reset.

- If you choose `End of Page`, the field is calculated and then reset to zero at the bottom of each page.

- If you choose `End of Column`, the field is calculated and then reset to zero at the bottom of each column.

-

Use the `Calculate` radio buttons as follows:

- Choose `Nothing` for no computations to be made on this field.
- Choose `Count` to count the number of times a report field is printed per group, column, page or report, depending on the `Reset:` selection. When you check `Count`, the calculation is based on the number of times the field occurs or appears, not on the field values.
- Choose `Sum` to compute the additive sum of the values of the field. This option keeps a running total of the field values for a group, column, page, or report.
- Choose `Average to` compute the arithmetic mean (average) of the field values within a group, column, page, or report.
- Choose `Lowest` to display the lowest value that occurred in that field for a group, column, page, or report. The value of the first record in the group is placed in this field. When a lower value is encountered, the value in this field changes accordingly.
- `Highest` works the same as `Lowest`, except that `Highest` keeps track of, and changes with, the highest value for the field.
- Std. Deviation returns a statistical measurement of the values within a group, column, page, or report.
- Variance is another statistical calculation related to standard deviation.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½RPT4_Common_Report_Generator_Dialog_Boxes)<<1}
Common Report Generator Dialog Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# The Report Generator Expression Format Dialog Box

A format can be specified for any output field using the Expression Format dialog box. The format controls how the field is displayed when the report or label is printed. Typical formatting of field data might include converting all alphabetical output to upper case, inserting commas or decimal points in numeric output, or converting the American date format (mm/dd/yy) to British format (dd/mm/yy).

You have the choice of displaying editing options from a pop-up list for `Character`, `Numeric`, and `Date` field types, or you can create a format template by entering characters directly into the `Format:` text box.

The Format dialog box includes a `Format:` text box. The `Format:` text box is used to specify what information you want to include or allow in the field. A format template (the characters entered in the `Format:` text box) can include any desired characters. Formatting characters, listed below, are used as a place-holder in the template for data from the field and allow you to control what type of data will be included in the field. Any characters in the template that are not on the list below (literals) will be printed exactly as entered.

| | |
|---|---|
| A | Displays alphabetical characters only |
| L | Displays logical data only |
| N | Displays letters and digits only |
| X | Displays any character |
| 9 | Displays digits only for character data; displays digits and signs for numeric data |
| # | Displays digits, blanks, and signs |
| $ | Displays fixed dollar sign in front of the numeric value |
| `$$` | Displays floating dollar sign in front of the numeric value |
| * | Displays asterisks in front of the numeric value. This function may be used in combination with a $ for check protection |
| ! | Displays uppercase |
| . | Specifies decimal point position |
| , | Separates digits left of the decimal point |

If any characters other than those listed above are entered in the Format template, they are displayed as literals along with the field output. For example, if you entered the following in the `Format:` text box as a template for a ten digit numeric field, the parentheses, the space, and the dash would be printed along with the numeric data:

(999) 999-9999

The Editing Options list will vary depending on your selection from the Character, Numeric, and Date radio buttons:

The Character radio button displays character data formatting options:

| | |
|---|---|
| To Upper Case | All characters are converted to upper case. |
| Ignore input mask | Non-format characters are displayed but not stored. |
| SET DATE format | Display data as a date using the current SET DATE format. |
| British Date | Display data as a European date (dd/mm/yy). |
| Left justify | Data begin in the leftmost space |
| Right justify | Data are printed flush right in field. |
| Center justify | Data are centered in field. |

The Numeric radio button displays numeric data formatting options:

| | |
|---|---|
| Left Justify | All numeric data for the specific field will begin at the leftmost position in the field. |
| Blank if Zero | If the field output is zero, the zero will not be printed. |
| (Negative) | Negative numbers will be placed in parentheses. |
| SET DATE format | Display data as a date using the current SET DATE format. |
| British Date | Display data as a European date (dd/mm/yy). |
| CR if Positive | CR (credit) will appear after the number if the number is positive. |
| DB if Negative | DB (debit) will appear after the number if the number is negative. |
| Leading Zeros | Prints all leading zeros. |
| Currency | Displays currency format. |
| Scientific | Displays a scientific notation. |

The Date radio button displays date formatting options:

| | |
|---|---|
| SET DATE format | Displays data as a date using the current SET DATE format. |
| British Date | Displays data as a European date (dd/mm/yy). |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Common_Report_Generator_Dialog_Boxes)<<1}
Common Report Generator Dialog Boxes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Custom_Reports_and_Labels)<<1} Producing Custom Reports and Labels

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT2_Producing_Quick_Lists)<<1} Producing Quick Lists

# Adding Activity Fields to Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½RPTX_Note_for_Adding_Activity_Fields_to_Reports)<<1}
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Reportsï¿½ ï¿½ ï¿½ )<<1}

When creating reports and quick lists, you are given the option of basing the report on Contact Manager information or Activity Manager information. If you are creating an activity-based report, when adding fields you may or may not immediately recognize what information is contained in each field.

Use the following table to guide you in your selection of the most useful activity fields: a description of what they contain is shown in the description column; an explanation of what they "return" when your quick list or custom report is printed is shown in the Returns column.

| **Field Name:** | **Description:** | **Returns:** |
|---|---|---|
| ActType | A number that indicates whether the item is a To-Do, an activity, or an extended activity. | 1:Activity<br>2:To-Do |
| AlarmMin | How many minutes before the item's due time will the alarm sound? | The number in the `Lead Time` field. |
| AlarmType | Has an alarm been set for this item? | 0: No<br>3: Yes |
| AssignStat | The status of the assigned item. | 0: Not Assigned<br>1: Pending (not rejected or accepted.)<br>2: Accepted (the item is part of user's activity list.)<br>3: Rejected (the task goes back to user who assigned it.) |
| CompDate | Completion date | The data in the `Completion Date` field. |
| CompTime | Completion time | The data in the `Completion Time` field. |
| Desc | User's description of the activity. | The information contained in the `Description` field. |
| Direction | The user's choice for the Direction radio buttons. | 1: In<br>0: Out |
| DueDate | Due date | The data in the `Due Date` field. |
| DueTime | Due time | The data in the `Due Time` field. |
| Duration | Number of minutes expected/taken for activity. | The data in the `Duration` field. |
| LastRecur | This indicates whether the item is the last instance of a series of recurring activities. | Returns ".T." if this *is* the last occurrence of a recurring activity; otherwise returns ".F." |

| | | |
|---|---|---|
| Owner | User ID of person who created this activity. | A three-character User ID. |
| Priority | The information contained in the Priority field. | (Blank) 1, 2 or 3 |
| Status | The user-defined status. | The information contained in the `Status` field. (Completed, incomplete, etc.) |
| Type | The user-defined type. | The information contained in the `Type` field. (Call, meeting, etc.) |
| UserID | The ID of the user to whom this activity is assigned. | A user ID. (If the item is a global will be blank.) |

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Fields)<<1} Adding Fields:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Printing_Custom_Reports_and_Quick_Lists)<<1} Printing Custom Reports and Quick Lists

# Layout Tools

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Reportsï¿½ ï¿½ ï¿½ )<<1}

The Report Generator Layout Toolbar allows alignment of groups of objects relative to one another. It also allows certain attributes of single objects to be modified.

## To open the Layout Toolbar

- Click the Layout Toolbar button (  ) on the Report Designer toolbar.

The following tools are available:

| | |
|---|---|
| **Align Left Sides** | Aligns the left sides of the selected objects with one another. |
| **Align Right Sides** | Aligns the right sides of the selected objects with one another. |
| **Align Top Edges** | Aligns the top edges of the selected objects with one another. |
| **Align Bottom Edges** | Aligns the bottom edges of the selected objects with one another. |
| **Align Vertical Centers** | Aligns the selected objects along their vertical centers. |
| **Align Horizontal Centers** | Aligns the selected objects along their horizontal centers. |
| **Same Width** | Makes all of the selected objects the width of the widest object. |
| **Same Height** | Makes all of the selected objects the height of the tallest object. |
| **Same Size** | Makes all of the selected objects the height of the tallest object and the width of the widest object. |
| **Center Horizontally** | Centers the group horizontally while retaining the selected objects positions relative to each other. If the group is in a column, it will be centered in the column. Otherwise, it will be centered on the page. |
| **Center Vertically** | Centers the group vertically in the band while while retaining the selected objects positions relative to each other. |
| **Bring to Front** | Places the selected group in front of a non-selected object. The non-selected object or group will appear to be covered by the selected group. |
| **Send to Back** | Places the selected group behind the non-selected object. The selected group will appear to be covered by the non-selected object or group. |

Not all of these tools will be available in all cases. Specifically, those controlling the size or positions of objects relative to each other will not be available unless more than one object is selected. The tools that size the objects relative to each other are not available for text objects. Otherwise, where a tool is described as having an effect on a group, the description will be the same for a single object, providing that tool is valid for a single object.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT4_Report_Graphics)<<1} Report Graphics

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Arranging_Objects_on_the_Page)<<1} Arranging Multiple Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Bring_to_Front_Send_to_Back)<<1} Bring to Front / Send to Back in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_Mode)<<1} Report Mode for Layered Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Select_Objects)<<1} To Select Report Objects:

# Report Graphics

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Reportsï¿½ ï¿½ ï¿½ )<<1}

Graphics can be added to a report to improve readability or appearance. TeleMagic's Report Generator offers a variety of graphic objects that can be included in your reports, as well as the means to arrange, resize, and color them for maximum impact and clarity.

### Select from the Following:

## Adding and Removing Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Objects_to_a_Report)<<1} Adding Objects to a Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Adding_Pictures_and_Other_Graphics)<<1} Adding Pictures and Other Graphics to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_Field_to_a_Report)<<1} To Add a Picture Field to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Add_a_Picture_from_a_File_to_a_Report)<<1} To Add a Picture from a File to a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Delete_an_Object)<<1} To Delete a Report Object:

## Changing Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Change_Report_Generator_Picture_Attributes)<<1} To Change Report Generator Picture Attributes:

## Colors, Patterns, and Pens

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_the_Color_and_Fill_Patterns_of_Objects)<<1} Changing the Color and Fill Patterns of Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Choosing_a_Fill_Pattern_for_Objects)<<1} Choosing a Fill Pattern for Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Fill_Color_and_Pen_Color)<<1} Fill Color and Pen Color for Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Pen)<<1} Choosing a Pen for Report Objects

## Drawing Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Drawing_Lines_Boxes_and_Circles)<<1} Drawing Lines, Boxes and Circles in a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Rectangle)<<1} To Draw a Rectangle in a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Rectangle_with_Rounded_Corners)<<1} To Draw a Rectangle with Rounded Corners in a Report:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Draw_a_Vertical_or_Horizontal_Line)<<1} To Draw a Vertical or Horizontal Line in a Report:

## General Appearance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Page_Preview)<<1} Page Preview

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT2_Report_Design_and_Planning)<<1} Report Design and Planning

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Page_Layout)<<1} Report Page Layout

## Grid

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Activating_Snap_to_Grid)<<1} Activating Snap to Grid in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Align_to_Grid)<<1} Align to Grid in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Changing_Ruler_and_Grid_Settings)<<1} Changing Report Ruler and Grid Settings

## Moving, Aligning, and Arranging Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Arranging_Objects_on_the_Page)<<1} Arranging Multiple Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Bring_to_Front_Send_to_Back)<<1} Bring to Front / Send to Back in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Center)<<1} Center Report Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Group_Ungroup)<<1} Group/Ungroup in the Report Generator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½RPT3_Moving_Sizing_and_Deleting_Report_Generator_Objects)<<1} Moving, Sizing and Deleting Report Generator Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Object_Placement_and_Alignment)<<1} Report Object Placement and Alignment
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Show_an_Objects_Position)<<1} Show a Report Object's Position
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Move_an_Object)<<1} To Move a Report Object:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Size_an_Object)<<1} To Size a Report Object:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Mode)<<1} Report Mode for Layered Objects

## Selecting and Deselecting Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Selecting_Objects)<<1} Selecting Report Objects:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Deselect_Objects)<<1} To Deselect Report Objects:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Invert_the_Selection_of_Objects)<<1} To Invert the Selection of Report Objects:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_To_Select_Objects)<<1} To Select Report Objects:

## Other

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT3_Working_with_Report_Objects)<<1} Working with Report Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT4_Layout_Tools)<<1} Layout Tools

# The Expression Builder Options Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Reportsï¿½ ï¿½ ï¿½ )<<1}

This dialog box allows you to limit what appears in the String, Math, Logical, and Date function lists in the Expression Builder. It also allows you to specify whether and how the alias appears in the expression, and whether system memory variables are shown. The following options apply:

- Select `String to d`isplay all string functions in the box. All selected string functions will be displayed in the Expression Builder.

- Select `Math` to display all math functions in the box. All selected math functions will be displayed in the Expression Builder.

- Select `Logical` to display all logical functions in the box. All selected logical functions will be displayed in the Expression Builder.

- Select `Date` to display all date functions in the box. All selected date functions will be displayed in the Expression Builder.

- 

  **All** Selects all functions in the box so that they all appear as choices in the Expression Builder.
  **Clear** Deselects all functions in the box so that they do not appear as choices in the Expression Builder.

The following options will be dimmed if an alias is not available or irrelevant:

- Choose `Always Add Alias` to always include the table or view name with fields used in the expression.

- Choose `Add Non-Selected Alias Only` to specify that when more than one table or view is open, only the name of any table or view that is not selected in the Aliases list of the Data Session window with any of its fields in the expression is included. Table or view names are not added for tables that are selected in the Aliases list.

- Choose `Never Add Alias` to never include table or view names with any field when you create the expression.

Select `Show System Memory Variables` to display all system memory variables. If this is not selected, only variables that have been defined will be included.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½RPT4_Common_Report_Generator_Dialog_Boxes)<<1}

## Note for TeleMagic Reports

Before you begin designing and creating your own quick lists and custom reports, you may want to look at and print the standard reports included with TeleMagic.

# Notes for Before You Begin with Standard Reports

## Fax Button

The Fax button located on many of the report dialog boxes is used to fax standard reports and is discussed in detail in the Preparing Standard Reports to Fax topic.

## Printers

TeleMagic creates reports with very high quality fonts and graphics by taking advantage of laser and ink jet printer technology. Most dot-matrix printers interpret laser or ink jet fonts as graphic images, and therefore require very long print times. We do not recommend using most dot-matrix printers to print TeleMagic reports.

## Note for Step 3

When you choose to print a Month at a Time report, inapplicable options in this dialog box become dimmed (unavailable). To-Dos cannot be included, and you may not define a `Time range:` or `Resolution:`. When you select the Day at a Time or Week at a Time report, the `Detail Page` check box becomes dimmed.

## Note for Step 6

If you are printing a Week at a Time or Month at a Time report, the date range must span at least one week or one month (depending on the report type).

## Note for Step 7

Week at a Time reports are always 10 hours long. The `To:` field will be completed automatically based on the `From:` field.

## Hint for Step 11

Press F2 in the `Type:` field to access any list box you have attached to the `Type:` field in the Activity dialog box.

# Notes for Step 14

## Detail Page

If you have selected `Detail Page` with the Month at a Time report, the detail page will be treated as a separate report in page preview. When you have finished viewing the main report and you exit Page Preview, the detail page will automatically load in the Preview window.

## Multiple Activities

In Week at a Time reports, a plus sign (+) to the left of an activity means that more than one activity is scheduled for the particular time slot. On weekends, a plus sign will appear if there is an activity scheduled for the same time slot on both Saturday and Sunday. Also, the number in parentheses beside a weekend activity shows the date for which the activity is scheduled.

## Note for Step 1

Printing Notebook records is handled as a report. These instructions also apply to printing originated in the `Print Notebook` dialog box.

## Note for Activity History Report

If you have any activities linked to a contact included in this report, you must have the Company and/or Contact key fields defined in Key Field preferences for the databases and levels of the linked records in order for this information to print. If the key fields are not defined, the report will print without information pertaining to the link. For more information, see Key Field Preferences

## Note for Step 8

If you are selecting a user group, only groups in which you are a member, or groups in which at least one member has granted you access to his or her calendar, will appear on the list. Only those users within a group who have granted you access to their schedules will be included in the report.

## Note for Step 13

We recommend that you attach a validated list box to your `Type:` and `Status:` fields in the Activity Manager. This will ensure consistent data entry, making your reports more accurate.

## Note for Step 15

You must have either `Statistics` or `Detail` marked. You will not be able to de-select both options.

## Note for Step 9

The selected key fields must be defined in Key Field preferences for the databases and levels on which you are printing in order for the information pertaining to the link to display.

## Note for To Prina Pending Activity Report

If you have any activities linked to a contact included in this report, you must have the Company and/or Contact key fields defined in Key Field preferences for the databases and levels of the linked contacts in order for the information pertaining to the link to display.

## Note for Step Seven

If you unmark both `Past Due` and `Upcoming`, only items due on the date specified in step 2 will be included. You will not be able to unmark all three activity types (activities, To-Dos, and extended activities.)

## Note for Address/Phone List Report

This report will use key fields when reporting on contact data, so it is essential that you define your Contact Key Fields in Key Field Preferences. In order for this report to print successfully, each database and level for which you are running the report must have a defined key field for Company and/or Contact, Address 1 and/or 2, City, State, Zip, and Primary Phone.

## Note for Step 2

If you mark the `Current Record Only` check box, the `Database`, `Filter`, and `Index` options will be dimmed (unavailable).

# Note for Contact List Report

This report will use key fields when reporting on contact data, so it is essential that you define your Contact Key Fields in Key Field Preferences. (See the Key Field Preferences topic.) In order for this report to print successfully, each database and level for which you are running the report must have a defined key field for Company and/or Contact, Address 1 and/or 2, City, State, Zip, Primary Phone, and Notepad. (You may still print the report if you do not have a Notepad key field defined.)

## Note for Step 4 (Option)

If you deselect this check box, the `Start Date:` and `End Date:` fields will become unavailable.

## Note for Step Six

Only dates that have been entered using the Notepad Stamp feature, or matching that format, will be recognized. Notes entered using a different format will be considered part of the previous note. If there are no notes entered in the acceptable format, the entire notepad will print.

## Note for Step 7 (Option)

If you deselect this check box, the activity radio buttons, and the `Start Date:` and `End Date:` fields will become unavailable.

## Note for Step Nine

Only those activities within the specified date range that are created by users whose schedules you can see will be included in the report.

## Note for Step 10

If you mark `Current Record`, the `Database:`, `Filter:`, and `Index:` options will become unavailable.

## Note for Printing Envelopes

TeleMagic will use key fields when printing envelopes, so it is essential that you define your Contact Key Fields in Preferences. (See Key Field Preferences for details.) In order for this report to print successfully, each database and level for which you are running the report must have a key field defined for Company and/or Contact, Address 1 and/or 2, City, State, Zip, and Primary Phone.

## Note for Step Four (Option)

If you should decide you do not want to include a return address, simply deselect the `Print Return Address` check box. If you want to edit the entry, deselect this check box, then select it again and the Return Address dialog box will re-appear. Edit your entry and click **OK**.

## Hint for Step 9

If you are printing envelopes for bulk mail, print the envelopes in ZIP Code order.

## Note for Printing from the Labels Sub-Menu

Most of these reports are designed to be compatible with standard Avery™ formats. If you do not know the Avery equivalent of the form you are using, experiment with the different label styles. If you do not find a pre-existing report format that will work with your forms, you can design a custom report using the Report Generator. (See the Creating Reports for instructions.)

## Note for Step 5

This option is not applicable to the Miscellaneous label options and will not appear on the dialog box.

## Hint for Step Nine

If you are doing a bulk mailing, index your labels by ZIP Code.

## Note for List Box Report

If you simply want to get a printout of the contents of a single list box, access the list box and use the **Print** button.

## Note for Step Three

If you select `Local Faxes`, you will be given a report on all faxes sent locally for the current User ID, not the current workstation.

## Note for Step Three (Option)

When you archive sent faxes during rebuild, you have the option of appending to an existing archive file, or overwriting it. If you choose to overwrite, the faxes that were overwritten will not be included in the report.

## Note for Step Six (Option)

The `User Group` and `Individual` radio buttons will be dimmed and unavailable for use if the `Queue` is set to `Local Faxes`.

## Note for System Reports

System Reports will print to your Windows default printer. Make sure you have a default printer established for the workstation from which you are printing.

# Note for Database Structure Report

The Print dialog box is provided to allow you to change your printer settings. The **Cancel** button on this dialog box will only cancel the first part of the report. The following sections will still be sent to your default printer.

## Note for User Security Report

The Print dialog box is provided to allow you to change your printer settings. The **Cancel** button on this dialog box will only cancel the first part of the report. The following sections will still be sent to your default printer.

## Note for Error Report

To print a report on a *single* error or group of errors, see the topic Logging and Viewing Errors.

## Hint for Step 15

If you need more control over your report than is available in Quick Lists, but prefer not to construct the report using the full custom option, you may want to consider using the Quick Report feature. See Adding Fields Using Quick Report .

## Hint for Accessing the Report Generator and Starting a Report

Consider exploring the sample reports that have been provided.

## Note for Step Five

Although you will be able to select fields from all three database levels, when you select a contact level in the `Use Data from:` list, the report will be based on that level. For example, if you select Level 2, a Level 1 field in the report will pull information from the Level 2 record’s parent. A Level 3 field will only pull information from the *first* child record attached to the Level 2 record. It is recommended that you base your report on the lowest database level from which you will be pulling information.

## Note for Step 8 (Option)

Supervisor users have full access to all areas of TeleMagic. The `Users With Access` list will include your user name and all supervisors. If a supervisor user’s security access is later changed, he or she will be moved back to the `Users Without Access` list. You should access this dialog box again if you want the user to retain access to the report.

## Note for Step 9 (Option)

You will not be able to remove supervisor users.

## Note for Step Two

The band height is expressed in the units assigned to your Report Generator rulers. To change the ruler settings, see Changing Report Ruler and Grid Settings.

## Notes for Step Three

It is especially important to keep the band height constant if you are printing on a predetermined label form.

The page footer and summary bands always print with the height specified in the Report Layout window, so `Constant Band Height` is always checked for these bands.

## Step Two Note

The band being removed must be empty.

## Step Three Note

If you make your columns wider than will fit in your margins, the number of columns will be reduced to allow them to fit on the page (as shown in the `Page Layout:` preview box). If this happens, adjust the column width (or narrow the margin) and re-add the column in the `Columns:` field.

## Step Four Note

Increasing the space between columns will reduce the width of the column.

## Hint for Step 7

This is useful if you are printing on a pre-formatted report or label form and need to enter precise dimensions.

## Step Ten Note

The remaining items in this section contain summary information about your printer setup.

## Step Twelve Note

Generally, for the `Source:` option, `Auto Select` is your best choice. Refer to your Windows and printer documentation if you need to change this field.

## Hint for Step 17

If you notice alignment problems when you print reports, it may be because the font you have selected is a proportional font. Using a non-proportional font, such as Courier or Terminal, may correct the problem.

## Hint for Creating a Report Title and Summary

You can use the summary page to display a Windows Bitmap image of a graph.

## Note for Step 4

To remove the title and/or summary band, uncheck the appropriate boxes in the Title/Summary dialog box.

## Hint for Adding Objects to a Report

A single click to select a tool will activate it while you draw the object, then immediately return you to the selection tool ( ● ). Double-clicking on a tool will select it, and it will stay selected until you click a different tool. You may also keep a button selected by clicking the Button Lock ( ● ) button on the Report Controls Toolbar.

## Hint for Adding and Editing Report Text

A single click to select the text tool will activate it while you enter the text, then immediately return you to the selection tool.

Double-clicking the Text Tool will select it and the Button Lock button. The Text Tool will remain selected until you select another tool, or until you release the Button Lock button and use the Text Tool once more.

## Hint for Step 3

If you want to be able to move parts of a string of text independently, re-click the text tool before typing each part.

## Hint for Placing a Field in a Report

A single click to select the field tool will activate it while you add a field, then immediately return you to the selection tool. If you have a number of fields you want to add, double-clicking the field tool or clicking the Button Lock button will select it, and leave it selected until you click a different tool.

## Step Three Note (Report Expressions)

For a detailed description of each option in the Report Expression dialog box, see The Report Expression Dialog Box.

## Step Four Note (Expression Builder)

The expression builder that appears in the Report Generator is slightly different from the Expression Builder that appears elsewhere in TeleMagic; however, the functionality is the same. For details on the Expression Builder as it appears in the Report Generator, see The Report Generator Expression Builder Dialog Box. For instructions on creating expressions, see the Expression Builder topic.

## Notes for Step 10

If you ever need to access this dialog box again, simply double-click the field on the Report Generator window.

If you have selected to add activity fields to your report, see Adding Activity Fields for information on the fields’ return values.

## Hint for Drawing Lines, Circles, and Rectangles

A single click to select the line, box, or rounded rectangle (circle) tool will activate it while you draw the object, then immediately return you to the selection tool. Selecting the Button Lock ( ● ) buton and selecting the tool, or double-clicking on any of these tools, will cause the selected tool to stay selected until you click a different tool.

## Step Seven Note

The Stretch downwards settings are not available when editing lines.

## Hint for Drawing a Vertical or Horizontal Line in a Report

You can choose pen and color attributes for the selected line from the Pen and Pen Color options on the **Format** menu. See: Changing the Color and Fill Patterns of Objects

## Hint for Drawing a Rectangle in a Report

You can choose pen, fill, and color attributes for the selected rectangle from options on the **Format** menu. See: Changing the Color and Fill Patterns of Objects

## Hint for Drawing a Rectangle with Rounded Corners in a Report

You can choose pen and color attributes for the selected round rectangle from the **Pen** and **Fill** options on the **Format** menu. See: Changing the Color and Fill Patterns of Objects

## Hint for Adding Pictures and Other Graphics to a Report

A single click to select the picture tool will activate it while you add the picture, then immediately return you to the selection tool. Double-clicking the picture tool will select it, and leave it selected until you click a different tool. You can also lock the Picture Tool by clicking the Button Lock button while the Picture Tool is selected.

## Step Five Note

Although you can view a list of all file types, you must select either Windows Bitmaps (*.BMP) or Windows Icons (*.ICO). The Report Generator will not recognize files with other formats.

## Notes and Hints for Step 8 (Bullets)

If the picture contains a large amount of white space around the edges, the actual image may be clipped out of the display. Drag the frame to a larger size to display the image.

You will be able to resize the frame to display more or less of the picture, if necessary.

## Note for Step 10 (Bullets)

The `Center Picture` option is used to accommodate pictures of varying sizes and is only available if you are inserting a picture field. (See To Add a Picture Field to a Report for more information.)

## Note for Adding a Picture Field to a Report

This option is only applicable if you are printing the report for a database that contains an OLE field.

## Notes and Hints for Step 6 (Bullets)

If the picture contains a large amount of white space around the edges, the actual image may be clipped out of the display. Drag the frame to a larger size to display the image.

You will be able to resize the frame to display more or less of the picture, if necessary.

## Notes and Hints for Step 2 (Bullets)

If the picture contains a large amount of white space around the edges, the actual image may be clipped out of the display. Drag the frame to a larger size to display the image.

You will be able to resize the frame to display more or less of the picture, if necessary.

## Notes and Hints for Adding Fields Using Quick Reports

This feature is only available when you first add a new report. If you do not take advantage of it before first saving a report or manually adding fields to the report, the option will be dimmed permanently for that report.

If you want to create a quick list, but find that the TeleMagic Quick List feature does not give you enough control over layout, you should consider creating a Quick Report.

## Note for Step 4 (Expanded Information)

If you are creating a report based on the Activity database, see the Adding Activity Fields topic for an explanation of activity fields and what they return.

## Note for Step 5 (Option)

The fields on this list are listed by field name, not field prompt. You may or may not be able to identify the field from its name. Plan your report carefully and make sure you know the names of the fields you want to use before accessing the Report Generator. It may be advisable to print a Database Structure report for a list of fields in your database. See the Database Structure Report topic for instructions on printing a Database Structure report.

## Note for Working with Report Objects

Options on the **Layout** toolbar will only be available if an object is selected. Selections not applicable to the selected object(s) will be dimmed.

## Note or Sizing a Report Object

The size of text objects is determined by the size, font, and length of text. Text objects are not sized the same way other report objects are. (For more about this, see the To Change Text Object Attributes topic.)

## Note for Choosing a Fill Pattern for Report Objects

If the color selected for the object is the same as the background, the object will not be visible. See Fill Color and Pen Color for more on this subject.

## Note for Choosing a Pen for Report Objects

While there seems to be no difference between the Hairline and 1 Point options on your monitor, when the report is printed the former is noticeably thinner than the latter. Also note the difference in widths among the examples. The lines were all produced in one format and then resized. The length of the line may change slightly when changing the pen setting of an existing line.

## Note for Step 5 (Expanded Information)

You may select up to 16 custom colors.

## Hint for Bringing Front/Send to Back in the Report Generator

If you select an object and bring it to the front, it will be in front of all other objects. If you then select another object and bring it to the front, the original object will be in front of all objects except the one that was brought to the front more recently. The same applies to sending objects to the back. You can use this to control how objects are layered on the page.

## Note for Report Mode for Layered Objects

If you are setting this for a rectangle, a rectangle with rounded corners, or a circle, the object must have been assigned a fill pattern. (See Choosing the Fill Pattern for Objects for more information.)

## Note for Report Data Grouping

When you use data grouping, the records will appear in order of the index selected for the report within the group.

## Note for Step 2 (Expanded Information)

You may enter the expression directly into the Group Expression field without opening the Expression Builder.

## Note for Step 3 (Expanded Information)

In addition to being able to group by fields, you can group on the results of an expression. For help with using the Expression Builder to create an expression, see the Expression Builder topic.

## Hint for Step 6 (Bullets)

If you want to display the page number on the report, use the Field tool on the toolbox to open the Report Expression dialog box. Click **Expression…** to open the Expression Builder. In the `Expression for Field on Report` field, type **_pageno**.

## Note for Step 7 (Expanded Information)

Activate the Mover Button for the group you want to move by clicking the button or group expression.

## Hint for Step 12

You can also add fields to the group header. For example, you may group a report by the company. If you place the company name and address fields into the group header, that information will print once for each company, with the detail information listed below.

## Hint for Report Variables

Make a memory variable to store the *_pageno* expression that allows you to include the page number in the report. Then, by using this new memory variable when you are creating reports, you will not need to use the Expression Builder every time you want to display page numbers.

## Note for To Create a New Report Memory Variable:

These steps assume that you have opened the Report Generator and are editing a report. See: Accessing the Report Generator and Starting a Report

## Note for Step 2 (Variable Names)

The variable name can be up to 245 characters in length, of which no more than 25 will be visible in the variable name box. The name must begin with a letter. The rest of the name can include any alphanumeric characters and the underscore. You will not be able to store a variable name containing illegal characters.

## Note for Step 2 (Environment)

If you are prompted to save environment information, select **No**. (This is a FoxPro feature that is not applicable at this point. TeleMagic will automatically save necessary environment information.

## Note for Printing Custom Reports and Quick Lists

If you are printing a custom report and have selected to report on the activity database instead of a contact database, the procedure for printing is slightly different. See the topic Printing an Activity-Based Custom Report for instructions.

## Notes for Step 4

Think carefully before changing this setting. If you are using groupings or headings in your report, changing the order in which the records are printed could have unpredictable results. Preview the report before printing with the new index.

Changing the filter and index on this dialog box will not affect the defaults for the report. The next time you select to print, your original index and filter will again be offered. If you want to change the default, highlight the report on the selection box and click **Change**.

## Note for Step 5 (Database Level)

When a Custom Report or Quick List is created, a database level is assigned to each report. This check box will be dimmed if the level you are on is higher than the database level assigned to the report. For example, if you are at record on Level 2 while accessing a report based on Level 3, you will not be able to check the `Current Record Only` check box.

## Step Six Note

When this option is selected, TeleMagic will determine which level you are currently on, and compare that to the specified database level of the report. If the records in the specified level of the report are not child records of the current level in the Contact Manager, you will receive a pop-up informing you that there are no applicable child records. For example, if you are on Level 3 and want to print a Level 2 report, TeleMagic will recognize that Level 2 records are not children of Level 3 records and you will not be able to use this feature. Similarly, if you are on Level 1 and want to print a Level 3 report, TeleMagic will recognize that Level 3 records are grandchildren, not children, of Level 1 records, and you will not be able to use this feature. In short, you must be one level higher than the level of the report to print all children of the current parent.

## Note for Step 2 (Option)

TeleMagic will detect whether the selected report is activity-based or not. If the selected report is not activity-based, the Print Custom Report dialog box will open instead.

## Notes for Step 13

Think carefully before changing this setting. If you are using groupings or headings in your report, changing the order in which the records are printed could have unpredictable results. Preview the report before printing with the new index.

Changing the index on this dialog box will not affect the default for the report. The next time you select to print, your original index will again be offered. If you want to change the default, highlight the report on the selection box and click **Change**.

## Note for Changing a Custom Report or Quick List

These instructions assume that you have created a report and have some familiarity with the Report Generator or Quick List features.

## Hint for Step 4

If you are limiting print access to this report and want to change the list of users, click **Select Users**.

## Hint for Step 6

In the Report Generator, use the Page Preview window to see how your changes will affect the report.

## Note for Step 3 (Screen Options)

The Database and Report options on this screen are used when copying a report from another database. See: Copying Reports and Quick Lists from Another Database

## Hint for Step 7 (Option)

Pay careful attention to the fields used in the report. Remember, there may be fields in the database from which you copied the report that are not in the current database. If any of these fields are used in the report, they should be removed in the copy.

## Note for Adding Activity Fields to Reports

When you print an activity-based quick list, the field name will display only as many characters as the field itself will allow. For example, the field name {Alarmmin} will appear on the printout as "Alar", because the field length in this case is 4. (This is also true of contact based fields in Quick Lists.)

## Note for Sample Reports

You must select a database before you start the Report Generator. If you want to follow the examples as they are presented, you will need to open the Documentation database. For instructions on how to change databases, see Opening a Different Database.

## Note for Creating a Sample Account Status Report:

This procedure uses examples that are based on the Documentation database. If you want to follow the example exactly as it is presented, you will need to open the Documentation database. To open a different database, see Opening a Different Database.

## Note for Step 3 (Report Names)

The report names may not start with blank spaces. TeleMagic will automatically trim any leading blank spaces when the report is saved.

## Note for Step Eight

For more on the various sections of the Report Layout window, including a detailed explanation of band types, see Bands in the Report Generator.

## Note for Step 29

For a detailed description of each option in the Report Expression dialog box, see, The Report Expression Dialog Box.

## Note for Step 34

Do not add the `logo` field in this manner; it is an OLE field, and must be added as described in the next step.

## Notes and Hints for Step 26

When the lines have been drawn, click the selection pointer tool to de-select the line tool.

See Pen if you want to change the style of these lines.

## Note for Step 51

See Page Preview if you need information on how to use the Page Preview dialog box.

## Hint for Reports Menu Configuration

When you exceed the number of reports that will fit on the standard **Reports** menu, an option titled **More User Defined Reports** will be added to the menu. Click this option to bring up a sub-menu with additional entries. The **More User Defined Reports** option will also appear on the sub-menu when it becomes full, allowing for several menus worth of space in which to place more reports.

## Note for Step 5 (Menu Lines)

The lines will be added at the end of the menu and may not be dragged to other locations.

## Note for Step 7 (Menu Configuration)

The top portion of the menu containing the TeleMagic Standard reports cannot be configured.

## Note for the Report Expression Dialog Box

For a practical example of when you will use the Report Expression dialog box to define fields, see step 29 of To Create a Sample Account Status Report.

## Hint for The Report Expression Dialog Box

Select this option if there are memo fields in your report.

## Note for The Report Generator Expression Builder Dialog Box (System Variables)

It is strongly recommended that you use caution when selecting system variables. Many of these variables contain sensitive information that has been encrypted for security reasons. Trying to print such information may create problems with report layout, etc. Other variables are only applicable in certain areas of the program and may not work correctly with your report. Before using a variable, make sure you are familiar with its use. This section discusses some of the more common variables. Complete documentation for the system memory variables is available by contacting your TeleMagic Reseller.

## Note for The Report Generator Expression Builder Dialog Box (Custom Variables)

You may create your own memory variables in the Report Generator. See Variables.

## Note for The Report Generator Calculate Field Dialog Box

If you use the Data Grouping option, you will see that each group expression is also shown on this menu, allowing you to reset the calculated field with any group.

## Note for The Report Generator Expression Format Dialog Box

If you do not edit the `Format:` text box, whatever information is contained in the field will be printed in the report. If you make any entry in the `Format:` text box, only information that is allowed by the template will be printed. For example, if you include the Company field with no formatting, the company names will print in the report as they appear in the Contact Manager. If you enter a literal in the `Format:` text box, you must then use the above characters (in this case, A, X, N, #, or 9) with that literal to include the data from the field. If you do not, only the literal will print in the report. If you use formatting characters, remember that one formatting character equals one character in the field. For example, if a field has thirty characters, and you enter XXX into the `Format:` text box, only the first three characters in the field will print in the report.

## Note for The Expression Builder Options Dialog Box

Select individual items by pressing CTRL+left mouse button. Select a consecutive group of items by left-clicking the first item and pressing SHIFT +left mouse button on the last item.

## Note for Step 6

This sample report is based on the Documentation database. If you are using another database, your selection of indexes will differ.

## Note for Step 23

If the Report Controls toolbar is not open, click the Report Controls button on the Report Designer toolbar. Or, select **Report Controls** from the **View** menu.

## Note for Making Changes to the Data Environment

If the field you want to add is not present, you must add the table containing the field to the data environment. To add a table to the data environment:

1. Click on the Data Environment button on the Report Designer toolbar.
   The Data Environment field will open.
2. Right-click anywhere on the Data Environment field and select **Add** from the floating menu.
   An Open dialog box will open.
3. Browse for the table(s) containing the desired field(s).
4. Highlight the table and click **OK**.

Once the table has been added to the data environment, you can close the Data Environment field.

## Note for Step 8

The Data Environment dialog box will indicate the tables that are to be used for this report. You can change the data environment, but should not need to. Once the Data Environment dialog box has been opened, it can be minimized or closed. TeleMagic automatically sets the data environment for the report when the Data Environment button is clicked.

# Forecasting Sales

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

In the direct sales environment there is a constant need for accurate, up-to-date sales data. Past sales need to be recorded and future sales should be forecast in order for a company to stay healthy.

TeleMagic's Sales Forecasting feature allows you to keep track of projected and actual sales, and relate those sales to contact records in any TeleMagic database. It also includes several easy-to-use formatted reports, which you can use to predict sales trends, analyze sales forecasting accuracy, and evaluate the overall performance of your salespeople.

TeleMagic's Sales Forecasting feature provides an integrated, standardized way to record, view, and report on your most up-to-date sales data.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Adding_Sales_Forecasts)<<1} Adding Sales Forecasts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Sales_Forecasting_Security)<<1} Sales Forecasting Security

# Sales Forecasting Security

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

Security access to Sales Forecasting is established at the Database Security screen, and is discussed in detail in the topic *Security*. There are four levels of security associated with the Sales Forecasting feature:

No Access, which does not allow a user to open the Sales Forecasting screens;

Add/Limited Edit, which gives a user access to Sales Forecast records and allows him or her to add records and edit all but the `Forecasted` fields and the `Rep:` field;

Full Edit, which gives a user access to add new Sales Forecast records, as well as the ability to alter all saved forecast information;

Delete, which gives access to add and edit Sales Forecast records, and the ability to delete records.

Supervisor users automatically have full access; they also have the ability to view sales forecasts created by other users. Non-supervisor users will only be able to view and report on their own forecasts.

If you do not have access to a particular function in Sales Forecasting, the associated menu option or button will be dimmed.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½SALES1_Adding_Sales_Forecasts)<<1}

# Adding Sales Forecasts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

To record sales forecasts with TeleMagic, you will need to:

- Estimate a prospective sale amount;
- Track the progress of the sales cycle;
- Record the final figures of the actual sale.

Logically, you will probably enter the estimates some time before the final sale has taken place. This section includes steps to take you through the process of recording an estimate. (For information on how you would enter information about the final sale, see the Recording Actual Sales topic.)

## To Add a Sales Forecast:

1. From the **Office** menu, select **Sales Forecasting**.

- **or** Select the Sales Forecasting icon on the TeleMagic toolbar.

   The Sales Forecasting dialog box will open.

   A blank dialog box will only appear if no sales forecasts have been added to the system. If you have already added forecasts, one of two things will happen:

   - The first sales forecast that was ever added to the system will be displayed.
   - If you have accessed the Sales Forecasting dialog box from a contact record with linked sales forecasts, the first linked forecast for the contact will be displayed.

2. Click **Add**.

3. Type a description of the sale you are forecasting in the `Description:` field.

   Your description does not need to be unique, but it should contain information that will readily identify the sale at hand.

4. Click in the `Rep:` field to enter a sales representative's name.

   The Select Sales Representative dialog box will open.

   The name of the current user entering the forecast information will be highlighted.

5. Click **OK** if this user is correct.

**or** Highlight another sales representative, and click **OK**.

You will return to the Sales Forecasting dialog box.

6. Enter a sale type in the `Type:` field.

   The `Type:` field is completely user-definable, and should be used to further categorize the sale. You might consider adding a list box to this field in order to standardize the sales types for clarity and reporting. (For more on list boxes, see the Creating, Adding To, and Selecting From List Boxes topic.)

   **Example:** You need to keep track of whether a sale is to a new customer or a repeat customer. You might set up a list box to specify details about the customer in the `Type:` field.

7. Enter a product type or name in the `Product:` field.

   The `Product:` name field is completely user-definable. You might consider adding a list box to this field in order to standardize product names for clarity and reporting.

8. Enter the projected quantity (if desired) in the `Qty:` field.

9. Enter the sales status in the `Status:` field. (You will probably want to update the information in this field as the sale progresses.)

   The `Status:` field is completely user-definable. You might consider adding a list box to this field in order to standardize the sales status for clarity and reporting.

10. In the `Quotation:` field, enter the amount of the sale, as quoted in the estimate to the customer.

11. In the `Budget Amount:` field, enter the total resources the customer has allocated to the purchase, if that information is available to you.

12. Enter a `Projected Sale Date:`, or click the Date Picker icon and choose a date from the pop-up calendar. This data must be entered for a sales forecast to be included in any of the Sales Forecasting reports.

13. In the `Probability of Closure:` field, enter a realistic estimate of the percentage of likelihood that the deal will close successfully.

    **Example:** You are dealing with a customer who is dependable, and has consistently ordered similar amounts of your product in the past. You might consider the sale highly probable, and enter 95% in this field.

14. Type any notes you want to add to the forecast in the notepad. Use the **Notepad Stamp** button to cause the date, time, and User ID to be stamped into the notepad.

    The Contact Link page allows you to attach a sales forecast to any contact record in any of your databases.

15. If you do not want to link this forecast to a record, leave the `No Link` radio button selected. Skip to Step 23.

**or** Click the `Current Contact` radio button if you want to link to the record currently displayed in the Contact Manager. Skip to Step 23.

**or** If you want to link the forecast to any record other than the current contact, click the `Other Contact` radio button.

16. To search for a record in the current database and level, enter the information you are going to search for in the `Search` field and click **Search**.

    The first record matching your search criteria will be linked to the forecast. Skip to Step 23.

**or** To search for a record using browse, click **Browse Contacts**. Select the record you would like to link, then skip to Step 23.

**or** To search for a record in a different database or level, click **Advanced Search**.

17. From the `Database:` drop-down list, select the database containing the contact record.

    **Example:** Documentation Database

18. From the `Level:` drop-down list, select the level containing the contact record.

    **Example:** Contact

19. Select an index from the `Index:` list. Make sure the index is based on the field containing the data you will use to search for the record to which you want to link.

    **Example:** If you know the first name of the contact, select the Contact First Name index in the Documentation database.

20. In the `Search for` field, enter the data you want to use to find the record.

    **Example:** Harold

21. Click Search.

    The first record matching your search criteria will be linked to the forecast.

**or** Click **Browse** to select the record from a browse window.

The browse window will display all of the records on the selected level of the selected database in order of the specified index. The record most closely matching your search subject will be highlighted.

22. Double-click the record to which you want to link the forecast.

    The Browse window will close, linking the selected contact to the forecast.

23. When you have entered all information for your forecasted sale, double-check the data for accuracy, then click **Save**.

    The `Created:` and `Last Revision:` fields will be updated to display when and by whom the record was first added and last changed.

24. Click **Close** to exit the Sales Forecasting dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Recording_Actual_Sales)<<1} Recording Actual Sales

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Recording_Sales_Progress)<<1} Recording Sales Progress

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Printing_Sales_Reports)<<1} Printing Sales Reports

# Working With Sales Forecasts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

- To Filter the Sales Forecasting Records:
- To Change the Order in Which Forecasts are Displayed:
- To View Individual Sales Forecasts:
- Sales Forecast Browse View
- Accessing Linked Contact Information
- Editing Sales Forecasts
- Deleting Sales Forecasts
- Recording Actual Sales
- Recording Sales Progress
- Printing Sales Reports

# To View Individual Sales Forecasts:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

1. Open a database and select **Sales Forecasting** from the **Office** menu.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

If the current record in the database has a forecast linked to it, that forecast will be displayed; otherwise, the first forecast added will be displayed.

2. Click the ● button to move forward through forecasts.

Click the ● button to move to the last forecast in the filter. (See Changing the Index and Filter of Sales Forecast Records for more on filtering.)

Click the ● button to move back through forecasts.

Click the ● button to move to the first forecast in the filter.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Sales_Forecast_Browse_View)<<1} Sales Forecast Browse View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

## Changing the Index and Filter of Sales Forecast Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

The order in which records are displayed is controlled by the current index, as displayed in the `Index:` field on the lower right side of the Sales Forecast dialog box. You can order your sales forecast records from practically any field in the Sales Forecast dialog box. There are also a number of pre-defined filters available for viewing only a particular sub-set of records.

To Change the Order in Which Forecasts are Displayed:
To Filter the Sales Forecasting Records:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_To_View_Individual_Sales_Forecasts)<<1} To View Individual Sales Forecasts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Sales_Forecast_Browse_View)<<1} Sales Forecast Browse View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# To Change the Order in Which Forecasts are Displayed:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

1. Open a database and select **Sales Forecasting** from the **Office** menu.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

The `Index:` list will display the default index `None`. This default index will present forecasts in the order in which they were originally added.

2. Click the `Index:` list arrow.

A list of available indexes will appear. There is an index for almost every field that appears in the Sales Forecasting dialog box.

3. Choose an index from the list.

**Example:** If you want to see forecasts in alphabetical order by description, choose `Description`. If you want to see forecasts in ascending order by amount of forecasted quotation, choose `Forecasted Quote`.

The selected index will be active.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_To_Filter_the_Sales_Forecasting_Records)<<1} To Filter the Sales Forecasting Records:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

## To Filter the Sales Forecasting Records:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

1. Open a database and select **Sales Forecasting** from the **Office** menu.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

2. Click the **Filters** button.

   The Sales Forecasting Filters dialog box will open.

3. Use the `Contacts`: radio buttons to filter on links to contact records:

   - Select `All Records` if you do not want to filter by contact record link.
   - Select `Current Database` if you want to view only forecasts linked to contacts in the current database.
   - Select `Current Contact` if you want to view only forecasts linked to the current contact.

   From the `Sales:` radio buttons, choose which sales status filter you would like:

   - Choose `All Records` if you do not want to filter by sales status.
   - Choose `Forecasted Sales` if you want to view only forecasts that have not closed (those with no date in the `Sale Date:` field).
   - Choose `Closed Sales` if you want only to view forecasts that have closed (those with information in the `Sale Date:` field).

   The `Contacts:` and `Sales:` filters can and should be used in conjunction with each other. For example, you may want to view all closed sales regardless of whether or not they are linked to a contact. In this case you would select `All Records` in the `Contacts:` section and `Closed Sales` in the `Sales:` section. Or you may want to view all pending sales for the current contact. In this case you would select `Current Contact` in the `Contact:` section and `Forecasted Sales` in the `Sales:` section.

   If there are no forecasts in the chosen filter, you will receive a message informing you of this fact. Click **OK** to return and set another filter.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_To_Change_the_Order_in_Which_Forecasts_are_Displ

ayed)<<1} To Change the Order in Which Forecasts are Displayed:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Sales Forecast Browse View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

Only one forecast is displayed at a time in the Sales Forecasting dialog box. If you want to view multiple forecasts at one time, you can use the Browse feature.

## To Access Sales Forecasting Browse View:

1. Open a database and select **Sales Forecasting** from the **Office** menu.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

2. If there is a particular order in which you want to view records, or a particular group of records you want to view, change the index and/or filter as described under Changing the Index and Filter of Sales Forecast Records.

3. Click **Browse**.

   The Sales Forecasting browse window will open:

   - Use the scroll arrows to browse up and down or across this listing.
   - To rearrange the order in which fields are displayed in this window, click the title bar of any column, and drag it to another position.
   - To change the width of a column in this window, pass the cursor over the line that separates the column titles. The cursor will change shape: . Click and drag the column divider to the new position and release the mouse button.
   - If you want to go to the details of a specific forecast, highlight that forecast and press ENTER.

4. To exit the browse window, press ESC or double-click the control box (located on the left side of the title bar).

   The forecast which was highlighted in the browse window will be displayed.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_To_View_Individual_Sales_Forecasts)<<1} To View Individual Sales Forecasts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Accessing Sales Forecasting Linked Contact Information

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

When viewing sales forecast information, you may need to view information on the contact record to which the forecast is linked. You can either view contact information directly from the sales forecast screen, or you can go to the related contact record.

To View Linked Contact Information:

To Go to a Linked Contact:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1}

# To View Sales Forecasting Linked Contact Information:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

1. On the linked sales forecast record, click **Contact Info**. (For details on navigating to the desired record, see the To View Individual Sales Forecasts: topic.)

• The Contact Information screen will open.

2. If you would like to view the contact's notepad, click **View Notepad**. A view-only notepad window will appear where you can review any notes associated with the contact. When this window is open, **Format** is added to the main menu. Options on this menu let you select the font and spacing of the text in this window. When you are done viewing the notepad, press ESC or double-click the control box to close the window.

## To Go to a Sales Forecasting Linked Contact:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

- On the linked sales forecast record, click **To Contact**. (For details on navigating to the desired record, see the To View Individual Sales Forecasts: topic.)

Sales Forecasting will close and you will be taken to the record in the Contact Manager.

# Recording Sales Progress

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

Once the initial client contact has been made and a sale forecast, a sales person will likely keep in contact with the client up until the time the sale closes. Many sales people have a specific schedule of phone calls, letters, and/or faxes used in following up on sales leads. TeleMagic allows you to track this sales progress, and even allows you to standardize this process through the use of list boxes.

This section assumes that you have already added a sales forecasting record. If you have not, see Adding Sales Forecasts.

## To View and Update Sales Progress:

1. Open a database and go to the contact record to which the desired forecast is linked (if applicable).
2. From the **Office** menu, select **Sales Forecasting**.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

3. Locate the sales forecast whose progress you want to chart and click **Sales Progress**.

   The Sales Progress dialog box will open.

4. Complete the fields following these guidelines.
   - The `Sales Phase` field allows you to standardize each phase of a sale. For example, you might have numbered follow-up letters, each one representing a different phase; or a specific set of sales steps which would each constitute a phase. It is useful if all users use the same terminology in naming sales phases. To that end, it is recommended you attach a list box to this field. (The list box will be shared by all seven `Sales Phase` fields.).
   - In the `Comments` field, type any comments concerning the specifics of this contact with the client.
   - In the `Date` field, enter the date on which the sales phase occurred, or click the Date Picker icon and choose a date from the pop-up calendar.
   - In the `Flag` field, enter a flag code consisting of up to 5 characters. Again, it is recommended you attach a list box to this field for consistency.
5. Click **Save**. You will return to the Sales Forecasting dialog box.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Recording_Actual_Sales)<<1} Recording Actual Sales

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Recording Actual Sales

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

In an ideal world, every forecast sale would actually take place and would be correct. In the real world, any good sales recording program needs to allow for the differences between a sales forecast and an actual sale. TeleMagic assumes that sometime after you record a sales forecast, you will want to enter the details of the actual final sale into your database.

This section assumes that you have already added a sales forecasting record. If you have not, see Adding Sales Forecasts.

## To Record an Actual Sale:

1. From the **Office** menu, select **Sales Forecasting**.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

2. Use the arrow buttons to locate the appropriate sales forecast.

**or** Click **Browse**, highlight the appropriate forecast in the browse window, and press ENTER.

Your sales forecast will look something like this:

•

**Sample Forecast Page With No Actual Sales Data Entered**

3. Click **Edit**.

**or** Click on the **Closed Sale** tab.

The Closed Sale page will open.

Enter the details of the sale into the `Actual Sale Amounts for Closed Sale` fields.

4. In the `Purchase Order:` field, enter the number of the purchase order used by the customer, if applicable.

5. Enter the date the sale was finalized in the `Sale Date:` field. (You must have data in this field if you want this record to be included in the `Closed Sales` filter and any reports on completed sales.)

**or** Click the Date Picker icon and choose a date from the pop-up calendar.

6. Enter the amount of the final sale in the `Sale Amount:` field.

7. Enter the cost of the goods to your company in the `Cost`

`of Goods:` field.

8. If you want to add a note, place your cursor in the memo field and click **Stamp Notepad**. Type your comments after the standard notepad stamp.

9. Click **Save** to save the sale figures.

**or** Continue on to other pages to further refine this forecast.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Recording_Sales_Progress)<<1} Recording Sales Progress

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Editing Sales Forecasts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

If you find you have made an error in your sales forecast data, you may access the forecast and edit it. Use caution when changing your sales forecasts. If you are generating regular reports on your forecast data, making significant changes to completed forecasts could compromise your sales statistics.

Access to edit the `Rep:`, `Quotation:`, `Budget Amount:`, `Projected Sale Date:`, and `Probability of Closure:` fields is subject to group security. (See the Sales Forecasting Security topic for details.)

## To Edit a Sales Forecast:

1. From the **Office** menu, select **Sales Forecasting**.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

2. Locate the forecast you want to edit.
3. Click **Edit**.

   The **Delete** button will change to a **Save** button and the **Cancel** button will become active.

4. Make the necessary changes and click **Save**.

**or** Click **Cancel** to discard changes.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1}

# Deleting Sales Forecasts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Forecastingï¿½ ï¿½ ï¿½ )<<1}

Occasionally you may need to clean out your sales forecasting files. For example, you may want to delete all forecasts over two years old.

You must have security rights to be able to delete Sales Forecasts. If you do not, the **Delete** button will be unavailable. (See the Sales Forecasting Security topic for details.)

## To Delete a Sales Forecast:

1. From the **Office** menu, select **Sales Forecasting**.

**or** Select the Sales Forecasting icon on the TeleMagic toolbar.

2. Locate the sales forecast you want to delete.

**or** Click **Browse**, highlight the appropriate forecast in the browse window, and press ENTER.

3. Click **Delete**.

   A confirmation dialog box will appear.

4. Click **Yes**.

   The record will be deleted.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1}

# Printing Sales Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

TeleMagic can produce reports that allow you to analyze the forecasting and sales data that have been collected using the Sales Forecasting feature. (See Forecasting Sales for details.)   These reports allow you to view data in a textual format, a graphic format, or both. They can be valuable tools for individual salespeople, as well as powerful management tools.

In addition to being able to select from a variety of report styles, these reports and charts can be filtered to include only the data you want to view. You are also able define groupings, and generate statistical summaries on those groups.

There are four Sales Forecasting reports available:

Forecasted Sales Report
Closed Sales Report
Forecast vs. Actual Report
Sales Progress Report

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½RPT1_Standard_Reports)<<1} Standard Reports
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Creating Sales Reports & Graphs

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

1. Open a database and access the Sales Forecasting dialog box by selecting **Sales Forecasting** from the **Office** menu.

2. At the Sales Forecasting dialog box, click the **Reports** tab.

   The Reports page will open.

3. Open the `Report:` list box. There are four types of reports that are available.

   - The `Forecasted Sales` report will produce a report of any sales forecasts that are still pending. This will include any records that have a date in the `Projected Sale Date:` field but not in the `Sale Date:` field. (Click here for information on the options available when printing the Forecasted Sales report.)
   - The `Closed Sales` report will produce a report of forecast sales that have closed. This will include records that have a date in the `Sale Date:` field. (Click here for information on the options available when printing the Closed Sales report.)
   - The `Forecast vs. Actual` report will produce a report comparing the `Sale Amount:` field to the calculated forecast amount (the quote * the probability of closure). This report will include records that have dates in both the `Sale Date:` and `Projected Sale Date:` fields. (Click here for information on the options available when printing the Forecast vs. Actual report.)
   - The `Sales Progress` report will produce a report showing all of the entries from the Sales Progress dialog box for any sales forecast that has a date in the `Projected Sale Date:` field. If there are no Sales Progress entries for a sales forecast, a blank line will print. (Click here for information on the options available when printing the Sales Progress report.)

4. In the `Start Date:` field, enter the earliest date from which the report is to select records, or click the Date Picker icon to bring up a calendar from which you can select a date.

5. In the `End Date:` field, enter the last date from which the report is to select records, or click the Date Picker icon to bring up a calendar from which you can select a date.

   `Include:` determines how much information will be reported from each sales forecast record by allowing you to select from the following options • If the Detail check box is marked, the report will contain additional information specific to the record, such as the Rep: and Product:, as well as dollar amounts and dates. This information will vary depending upon the report you are printing.

6. When Detail is marked, you will also be able to select from the following check boxes:

   - If the Contact Information check box is marked, the report will contain the Company and Contact fields from the record to which the forecast is linked.
   - The Other Information check box allows you to include miscellaneous information relating to a forecast, such as the contents of the Description field.
   - If the Sales Progress check box is marked, the report will contain the information from the Sales Progress Chart dialog box.
   - If the Comments check box is marked, the report will contain any notes entered in the notepad on the Sales Forecasting dialog box.
   - If the Summary Totals check box is marked, grouping subtotals (based on your grouping selections in step 13, below) and totals will be generated.

7. Select Individual if you want to report on only one user. If you are a supervisor user and want to report on forecasts other than your own, when the Individual radio button is selected, a list box showing all users in the system will be enabled. Select the user from the list on whom you want a report.

**or** If you are a supervisor user, select the User Group radio button if you want to report on all members of a user group. When the User Group radio button is selected, a list of user groups is enabled. Select the group from the list on which you want to report.

8. Choose the appropriate Report on: filter:

   - If you choose All Records (which is the default), you will get all of the forecasts regardless of database and contact link.
   - If you choose Current Database, you will get all of the forecasts linked to contact records in the current database.
   - If you choose Current Contact, you will only see forecasts linked to the current contact.

9. Type: allows you to select a filter based on items in the list box attached to the Type: field on the Sales

Forecasting dialog box (if applicable). If you do not have a list box attached to this field, you will be able to report on either all forecast types, or forecasts with no data in this field.

10. `Status:` allows you to select a filter based on items in the list box attached to the `Status:` field on the Sales Forecasting dialog box (if applicable). If you have no list box attached to this field, you will be able to select between all status types, or forecasts with no data in this field.

11. `Product:` allows you to select a filter based on items in the list box attached to the `Product:` field on the Sales Forecasting dialog box (if applicable). If you have no list box attached to this field, you will be able to select between all products, or forecasts with no entry in this field.

12. Select the order that you want the report to be printed in from the `Index:` list. Records in the report will print in the order of the data in the selected field.

    You can further sort your report using the Groupings option. Groupings will allow you to group by the Month, Product, Sales Rep, Status, Type, or Year and produce summary totals on each grouping. For example, if you are ordering by Product, and you create a grouping by Sales Rep, the records for each Sales Rep will be in order by product. You can then create a further grouping by month to see the Sales Reps groups in chronological order divided by month, with multiple forecasts in each month arranged by product. You can select up to three sub-groups.

13. If you want to use Groupings, mark the `Use Grouping` check box.

    The **Groups** button will become active.

14. Click **Groups**.

    The Report Groupings dialog box will open.

    On the left side of the Report Groupings dialog box is the list of `Available Groupings`. (You are allowed to choose up to three for each report.)

15. Highlight the grouping you would like to use from the `Available Groupings` list and click **Add**. The item will move into the `Selected Groupings` box to the right. To remove any choice from `Selected Groupings`, highlight it and click **Remove**. Your selection will move back to `Available Groupings`.

    The order of the groupings in the `Selected Groupings` box is very important in how the report is arranged, and in how it calculates subtotals and totals.

For example, if you were grouping by `Sales Rep` first, and then grouping the sales reps by `Month`, `Sales Rep` must be first in the `Selected Groupings` box. After you have selected all of the groupings to be used, you can rearrange the order in which they will appear (and, therefore, the order of the data's grouping, subtotaling, and totaling).

16. To change the order of `Selected Groupings`, click the button to the left of each grouping, drag it to its new position, and drop it.

17. When satisfied with your grouping selections, click **OK**. The groupings will display in the Groupings field.

18. If you want to generate a textual standard report, select the `Report` radio button and proceed to step 20.

**or** If you have groupings established and want to see your report in the form of a graphic chart, select the `Graph` radio button.

**or** If you have groupings established and want to see a textual report that includes a graph, select the `Report with Graph` radio button.

19. If either the `Graph` or `Report with Graph` radio button is marked, the `Graph Style:` list will activate. Choose the style of graphic chart that you want.

20. Click **View** to see a preview of the report and/or graph selected. See Page Preview for instructions on using the Page Preview window.

21. When you have finished previewing the report, click **OK**.

22. If satisfied with the preview, click **Print** to print the report.

**or** Make any changes and repeat steps 20 through 22.

23. Click **Close** to return to the Sales Forecast dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Forecasted_Sales_Report)<<1}
Understanding the Forecasted Sales Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Closed_Sales_Report)<<1}
Understanding the Closed Sales Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Forecast_vs_Actual_Report)<<1}
Understanding the Forecast vs. Actual Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Sales_Progress_Report)<<1}

Understanding the Sales Progress Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

# Forecasted Sales Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

In order to be available for any reports, all forecasts must have an entry in the `Rep` (sales rep) field.

The Forecasted Sales report is designed to show the forecasts that have been created, but not closed.

This report is based on:

1. A date in the `Projected Sale Date:` field
2. No date in `Sale Date:` field

You have the option of printing all applicable forecasts, or using filters to print only select forecasts.

The `Include:` check boxes will all be available for use, with the exception of `Contact Information`. It only becomes available if the `Report on:` filter is set to `Current Database`.

The `Index:` list will show all of the standard index fields, plus the forecast specific fields `Budget Amount`, `Probability of Closure`, `Projected Sale Date` and `Quotation Amount`.

If data grouping is being used, the Available Groupings will include all of the standard groups plus `Projected Sale Month` and `Projected Sale Year`.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Forecasted_Sales_Report)<<1} Understanding the Forecasted Sales Report
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Closed Sales Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

In order to be available for any reports, all forecasts and closed sales must have an entry in the `Rep` (sales rep) field.

The Closed Sales report is designed to show the sales that have been completed by entering data in the `Actual` fields.

This report is based on:

1. A date in the `Sale Date:` field

The `Include:` check boxes will all be available for use with the exceptions of `Sales Progress` and `Contact Information`. `Contact Information` will only become available if the `Report on:` filter is set to `Current Database`.

The `Index:` list will show all of the standard index fields, plus include the closed sale specific fields `Cost of Goods`, `Purchase Order`, `Sale Amount`, and `Sale Date`.

If data grouping is being used, the Available Groupings will include all of the standard groups plus Sale Month and Sale Year.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Closed_Sales_Report)<<1} Understanding the Closed Sales Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

## Standard Indexes

In addition to indexes which are only applicable to specific reports, the `Index:` list includes a selection of standard options which are universal to all report types:

Natural Order
Product
Sales Rep
Status
Type

## Standard Available Groupings

In addition to the available report groupings which are only applicable to specific reports, the Available Groupings list includes a selection of standard options which are universal to all report types:

Product
Sales Rep
Status
Type

# Forecast vs. Actual Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

In order to be available for any reports, all forecasts and closed sales must have an entry in the `Rep` (sales rep) field.

The Forecast vs. Actual report is designed to show a comparison of the forecast estimates and the actual sale data.

This report is based on :

1. A date in the `Projected Sale Date:` field
2. A date in the `Sale Date:` field

The `Include:` check boxes will have `Detail`, `Other Information`, and `Summary Totals` available.

The `Index:` list will show all of the standard index fields and include all of the forecast (`Budget Amount`, `Probability of Closure`, `Projected Sale Date`, and `Quotation Amount`) and closed sale (`Cost of Goods`, `Purchase Order`, `Sale Amount`, and `Sale Date`) specific fields.

If data grouping is being used, the Available Groupings will include all of the standard groups and include all of the forecast (`Projected Sale Month` and `Projected Sale Year`) and closed sale (`Sale Month` and `Sale Year`) specific groups.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Forecast_vs_Actual_Report)<<1} Understanding the Forecast vs. Actual Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Sales Progress Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

In order to be available for any reports, all forecasts and closed sales must have an entry in the `Rep` (sales rep) field.

The Sales Progress report is designed to show all of the sales progress entries that have been created for forecasts and/or closed sales.

This report is based on:

1. A date in the `Projected Sale Date:` field
2. Any information in any of Sales Progress fields: `Sales Phase`, `Comments`, `Date`, or `Flag`

The `Include:` check boxes will have `Detail`, `Other Information`, and `Summary Totals` available for use.

The `Report on:` filter will have the added filters `All Closed Sales` and `All Forecasted Sales`.

The `Index:` list will show all of the standard index fields and include all of the forecast (`Budget Amount`, `Probability of Closure`, `Projected Sale Date`, and `Quotation Amount`) and closed sale (`Cost of Goods`, `Purchase Order`, `Sale Amount`, and `Sale Date`) specific fields.

If data grouping is used, the Available Groupings will include the standard groups.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Understanding_the_Sales_Progress_Report)<<1} Understanding the Sales Progress Report

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Understanding the Forecasted Sales Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

The Forecasted Sales report is designed to give you comprehensive information concerning all of your sales forecasts which are still pending (ones which do not have information in the `Actual` fields). The information included in this report will vary depending on the settings selected on the Reports dialog box.

In the table below, the column on the left shows the `Include:` check boxes. The column on the right shows the headings appearing on the report if the check box is marked. (Data from your sales forecasting records will appear beneath the heading.) If the heading name is different from the sales forecasting field(s) used to generate the information under the heading, the field(s) used will be shown in parentheses after the heading name. In addition, some report data are calculated from sales forecast field information; their equations are shown in parentheses.

| **The Include Check Box:** | **Will Generate:** |
|---|---|
| Detail check box | Rep, Product, Quantity, Date (Projected Sale Date), Quotation, Budget Amount, Probability (Probability of Closure) |
| Contact Information check box | Contact information (based on Key Field selections) from contacts in the current database linked to the forecast records (only available if you have selected `Current Database` in the `Report on:` filter and your Contact Key Fields are defined for the current database) |
| Other Information check box | Description, Type, Status |
| Sales Progress check box | All Sales Progress entries |
| Comments check box | Any information in the forecasts' notepads |
| Summary Totals check box | Report Totals include: Quotation (total of all Quotations), Avg Quote (average amount of all Quotations), PCT (percentage of total Quotations), Budget (total of all Budget Amounts), Avg Budget (average amount of all Budget Amounts), PCT (percentage of total Budget Amounts), Forecast (total of all Quotations * average weighted percentage of all Probability of Closures). If groupings are selected, subtotals will be shown and include the same fields as the Report Totals. |

All of the graph styles of this report use the Forecast amount (Quotation * average weighted percentage of all Probability of Closures) along with the Group(s) selected.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With

Sales Forecasts

## Contact Information check box

The information shown on reports and summaries when this check box is marked will vary depending on the database level to which the forecast record is linked. The following information (based on your Key Field preferences) will be shown:

| | |
|---|---|
| Contact Name | Will show when linked to the contact record |
| Company | Will show when linked to the company record or to the contact record |
| Primary Phone | Will show when linked to the company record or to the contact record |

## Understanding the Closed Sales Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

The Closed Sales report is designed to give you comprehensive information concerning all of your closed sales forecasts (ones for which a sale has been made and for which sales data have been entered in the `Actual` fields). The information included in this report will depend on the settings selected on the Reports dialog box.

In the table below, the column on the left shows the `Include:` check boxes. The column on the right shows the headings appearing on the report if the check box is marked. (Data from your sales forecasting records will appear beneath the heading.) If the heading name is different from the sales forecasting field(s) used to generate the information under the heading, the field(s) used will be shown in parentheses after the heading name. In addition, some report data are calculated from sales forecast field information; their equations are shown in parentheses.

| **The Include Check Box:** | **Will Generate:** |
|---|---|
| Detail check box | P.O. (Purchase Order), Rep, Qty (Quantity), Product, Date (Sale Date), Cost (Cost of Goods), Total Sale (Sale Amount), Net Sale (Sale Amount less Cost of Goods, but only if the Cost of Goods is not zero) |
| Contact Information check box | Contact information (based on Key Field selections) from contacts in the current database linked to the forecast records (only available if you have selected `Current Database` in the `Report on:` filter and your Contact Key Fields are defined for the current database) |
| Other Information check box | Description, Type, Status |
| Sales Progress check box | Not available |
| Comments check box | Any information in the forecasts' notepad |
| Summary Totals check box | Report Totals include: Cost (total of all Cost of Goods), Avg Cost (average amount of all Cost of Goods), PCT (percentage of total Cost of Goods), Total Sales (total of all Sale Amounts), Avg Sale (average amount of all Sale Amounts), PCT (percentage of total Sale Amounts), Net Sales (total amount of all Sale Amounts less Cost of Goods), Avg Net (average amount of Net Sales; will only including those records with the Cost of Goods not equal to zero), PCT (percentage of total Net Sales). If groupings are selected, subtotals will be shown and include the same fields as the Report Totals. |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

## Understanding the Forecast vs. Actual Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

The Forecast vs. Actual report is designed to let track productivity by producing a comparison of the original sale forecast and the final sale. The information included in this report will vary, depending on the settings selected in the Reports dialog box.

In the table below, the column on the left shows the `Include:` check boxes. The column on the right shows the headings appearing on the report if the check box is marked. (Data from your sales forecasting records will appear beneath the heading.) If the heading name is different from the sales forecasting field(s) used to generate the information under the heading, the field(s) used will be shown in parentheses after the heading name. In addition, some report data are calculated from sales forecast field information; their equations are shown in parentheses.

| **The Include Check Box:** | **Will Generate:** |
|---|---|
| Detail check box | Rep, FC Date (Forecasted Date), Quotation, Budget Amount, Probability (Probability of Closure), Sale Date, Quantity, Cost (Cost of Goods), Total Sale (Sale Amount), Net Sale (Sale Amount less Cost of Goods; will only be included for records with a Cost of Goods not equal to zero ) |
| Contact Information check box | Not available |
| Other Information check box | P.O. (Purchase Order), Product, Description |
| Sales Progress check box | Not available |
| Comments check box | Not available |
| Summary Totals check box | Report Totals include: Quotation (total of all Quotations), PCT (percentage of total Quotations), Forecast (total of all Quotations * average weighted percentage of all Probability of Closures), PCT (percentage of total Forecasts), Total Sales (total of all Sale Amounts), Avg Sale (average amount of all Sale Amounts), PCT (percentage of total Sale Amounts), Net Sale (total amount of all Sale Amounts less Cost of Goods), PCT (percentage of total Net Sales), Forecast Accuracy (Forecasts less Total Sales) and its percentage from Total Sale. If groupings are selected subtotals will be shown and include the same fields as the Report Totals. |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

# Understanding the Sales Progress Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Sales Reportsï¿½ ï¿½ ï¿½ )<<1}

The Sales Progress report allows you to track the sales steps entered in the Sales Progress Chart dialog box and compare them to the forecast and actual sale dates. (This report does not allow any `Include:` settings to be selected in the Reports dialog box.) The Sales Progress Chart dialog box allows for seven rows of data, each considered one phase in the sale. These seven rows (or phases) are represented in this report with the headings Phase 1 through Phase 7. Beneath these headings is general information concerning the forecast, specifically Sales Rep (Rep), Description, Product, and Status.

If there are Sales Progress entries, the Sales Phase field from each of the seven rows in the Sales Progress Chart dialog box will be shown beneath the general forecast information, and under the corresponding Phase heading. If there is no information in a particular row of Sales Progress, a blank entry will print under the appropriate Phase number. Below the Sales Phase information will be that Sales Progress entry's Date and that Sales Progress entry's Flag. The forecast's Projected Sale Date will appear in a column on the far left, and the actual Sale Date, if applicable, will appear in a column on the far right. You can scan across this report for each forecast to compare the projected sale date to the actual sale date, and track the steps taken to close the sale.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES2_Creating_Sales_Reports_Graphs)<<1} Creating Sales Reports & Graphs

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Forecasting_Sales)<<1} Forecasting Sales

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SALES1_Working_With_Sales_Forecasts)<<1} Working With Sales Forecasts

## Notes for Step 1

You must have a contact database open to use Sales Forecasting. If you do not have an open database, the Sales Forecasting option will not be available.

You must have security rights to be able to add Sales Forecasts. (See the topic Sales Forecasting Security for more information.)

## Note for Step 23

Depending on your security rights, you may or may not be able to edit your forecasts later once you have clicked **Save**. Make sure all of the information is accurate before saving.

## Note for Step 1

Do not confuse the sales forecasting internal indexes with regular TeleMagic database indexes. Although they function in the same manner, they are not linked in any way. The index currently in use in your database has no effect on the order in which forecasts are displayed, and vice versa. Also, you cannot add any new forecasting indexes, as you can in a contact database.

## Note for Step 3

Any change you make to the layout of this window will be retained permanently. The changes will remain in effect for your User ID until you change them again.

## Note for Step 3

See the topic Viewing More than One Record at a Time (Browse View) for more information on working with a TeleMagic browse window.

## Note for Step 1

If the **Contact Info** button is unavailable, the sales forecast record is not linked to a contact.

## Note for Step 4

See Creating, Adding To and Selecting From List Boxes for help with attaching a list box to any of the Sales Progress fields.

## Note for Step 6

The `Contact Information` check box will only be available if you are printing a Forecasted Sales or Closed Sales report. You must also be basing the report on the current database. (See step 8 for information on basing the report on all databases, the current database, or the current contact.)

## Note for Step 6

Not all of these check boxes will be available with each type of report style. In addition, the actual information included in the report as a result of using the check boxes may differ depending on the report style. For information on exactly what will be printed for the type of report you have selected, select from the following topics: Understanding the Closed Sales Report, Understanding the Forecast vs. Actual Report, Understanding the Forecasted Sales Report, or Understanding the Sales Progress Report,

## Note for Step 7

If you are not a supervisor user, you will only be able to report on your own forecasts.

## Hint for Step 7

Consider creating a user group for Sales Reps. (See the Creating User Groups topic for instructions.)

## Note for Step 13

If you have a selected a grouping for a previous report, it will be given as a default in the Groups field.

## Note for Step 15

Make sure that the sales forecast records you are reporting on have dates entered in `Projected Sale Date:` and/or `Sale Date:` fields in the Sales Forecasting dialog box when grouping by Month and/or Year. If there are no dates entered, these records will be excluded from the report.

## Note for Step 17

If you mark the `Use Grouping` check box but do not select a group, the default groups (from previous reports), if any, will print. If you do not have any default grouping selections, there will be no groupings in the report.

## Notes for Step 18

The graph options are unavailable if you are not using data groupings. If you are planning on creating a pie chart, you need only one grouping. (If you have only one grouping, select the Pie Graph Style in step 19, below, before you select the desired Graph radio button.) If more than one grouping is selected, the report will be based on the first grouping only. Keep in mind that a pie chart only includes one grouping, so that if you choose to group by month, TeleMagic will ignore the year. All forecasts in the same month, regardless of year, will be included in the same section of the pie. Any other graph styles require two groupings if you are printing any report other than Forecast vs. Actuals. (Forecast vs. Actuals requires one grouping, with the comparison data acting as the other group.) If you have a third grouping, it will not be represented in the graph.

The graph options use the MS Graph program (GRAPH.EXE). MS Graph is provided by Microsoft with many of its applications (although not Windows). TeleMagic will automatically search to see if GRAPH.EXE is in your computer. If you do not have MS Graph installed, TeleMagic will install it for you. If for any reason TeleMagic is unable to install MS Graph, the graph options will either be dimmed, or, when you choose to include a graph in a Sales Forecasting report, the printout will only show a sample of the graph style you have chosen. The sample will not generate any information based on your report selections or on sales forecasting data, but will merely give you an example of what the specified type of graph will look like when generated using MS Graph. If this occurs, call your reseller or TeleMagic Technical Support for assistance in installing MS Graph.

## Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Screen_Designer_Note)<<1}

The Screen Designer is used to customize views in the Contact Manager. Using the Screen Designer, you can make the main window in TeleMagic look exactly the way you want it to look. You can change existing databases, or create brand new databases.

What is a Contact View?
Why You Would Want to Create or Customize a View
What You'll Need
What You Can Do
What You Cannot Do
Designing Your Contact View
Planning Your Contact Views
Starting the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TM.HLPï¿½TM_Designing_Databases)<<1}

# What is a Contact View?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Each database level that is in use has a view. (If there is no view for a level, that level will not be accessible in the database.) The view is all of the pages you can access on the level. You can attach multiple views to any database level. In other words, if you change views, you will be able to see a different set of pages on the same level.

Pages can be thought of as forms. A view is a set of forms. To “fill out a form” means to fill in the blanks that someone has laid out, pre-formatted on a page. In some cases, only one form is needed to accomplish a given task. In others, many forms may be required. In some cases, where many forms are available, only some of the forms need to be used .

A TeleMagic view is like a set of paper forms laid out on the computer screen with blanks for each record’s data. You can design all of the screens you need to accomplish your goals. Access to these forms can be controlled so that only the people who need to see a given screen will have access to it.

Just as each department of a large company may use several different forms, each level of a database may need several different views. And just as each departmental form can consist of one or more pages, you may need more than one page for each view.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Why_You_Would_Want_to_Create_or_Customize_a_View)<<1} Why You Would Want to Create or Customize a View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_ll_Need)<<1} What You’ll Need

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Can_Do)<<1} What You Can Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Cannot_Do)<<1} What You Cannot Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Designing_Your_Contact_View)<<1} Designing Your Contact View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Planning_Your_Contact_View)<<1} Planning Your Contact Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

## Why You Would Want to Create or Customize a Contact View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

TeleMagic comes with a selection of sample databases with the views already provided. Many of these have already been customized for specific businesses. It is possible that you may never need to create a new view or change your existing views. However, you may have specific requirements in your business that are not met by the existing databases, or you may want to modify one of those databases to fit your needs, or even simply change the "look" of the screen to your tastes.

You may also want to add additional views to those already existing in your database. How you need to view your data may depend upon what you are doing at the moment. Therefore, as with paper forms, you can tailor TeleMagic contact views to specific uses. However, a TeleMagic view has a significant advantage over a paper form. With a paper form, you must type data common to all forms into each form. In TeleMagic, if you type information into a field in any one page, it will be updated on any other page or view on which that field appears. There is no need to re-type data (like name, address, and phone number) which are common to different pages.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_is_a_Contact_View)<<1} What is a Contact View?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_ll_Need)<<1} What You'll Need

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Can_Do)<<1} What You Can Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Cannot_Do)<<1} What You Cannot Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Designing_Your_Contact_View)<<1} Designing Your Contact View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Planning_Your_Contact_View)<<1} Planning Your Contact Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

# What You’ll Need for the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Security rights to use the Screen Designer.

   Access to the Screen Designer is subject to group security rights. If the Screen Designer option is dimmed on the Contact Utilities menu, you do not have access to add or change views

2. Specific Windows skills.

   By now you should know how to use a mouse, open a menu, and select options from a menu or dialog box. Specifically, you should be able to “drag and drop” with the mouse. If you are not comfortable with these skills, see Basics of Using TeleMagic Enterprise.

3. Some familiarity with TeleMagic.

   Navigation in the Screen Designer is very similar to navigation in TeleMagic. You will be more comfortable working in the Screen Designer if you know how to switch among levels, pages, and views. See Changing Levels, Views, and Pages for more information on navigating in TeleMagic.

4. An installed database.

   You must have a database open when using the Screen Designer. Any views or pages created will be for that database. You should have your database installed and have a good idea of what changes you want to make before proceeding. If you are starting with a database that has existing views, you should know whether you want to modify an existing view, or add a new one.

5. Basic understanding of your contact database structure.

   If you have designed your own contact database, this is no problem. But if you are learning to use an existing contact database, you will find screen design easier if you find out a few things about it. How many levels does it have? What is stored at each level? What fields exist in the database? What fields will need to be added? How will you use your data? Who will enter your data, and how?

   If you are working with an existing contact database, you may find it helpful to print out a Database Structure Report. This will allow you to see how many levels exist in the database and what is stored at each level. A Database Structure Report will also supply you with other information that you may find helpful. (See the Database Structure Report topic for more information.)

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_is_a_Contact_View)<<1} What is a Contact View?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Why_You_Would_Want_to_Create_or_Customize_a_View)<<1} Why You Would Want to Create or Customize a View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Can_Do)<<1} What You Can Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Cannot_Do)<<1} What You Cannot Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Designing_Your_Contact_View)<<1} Designing Your Contact View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Planning_Your_Contact_View)<<1} Planning Your Contact Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

# What You Can Do with the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- You can create an unlimited number of multi-page views for each database.

  A billing office may have different fields that are needed depending on whether an account pays by cash, COD, or credit; however the basic information on each charge (date, amount, purchase order) will be common to all payment types. Separate views could be set up for each type of account, with data common to all payment types appearing on each view, and data specific to a particular payment type only appearing in the related view. Consider how the use of multiple pages and views will affect the organization and ease of access for your data.

- You can create up to 999 pages for each view.

  Multiple pages can help to organize data entry, as well as make data easier to scan by placing it in a logical format. For example, in a customer data view, you might want to put sales lead data on a separate page from addresses and phone numbers.

- You can define the size of any page in your view.

  You have the ability to make a page as small as approximately ¾ of an inch square, too large enough to fill your screen. Remember that monitor resolution will effect how the page is displayed. A page that fills your screen may not fill, or may overfill, the screen of a user operating in another resolution. You should know the resolution of the monitors in use at all workstations that will be required to access TeleMagic and use the lowest common denominator when selecting your page size.

- You can decide what fields to display.

  You can have up to 252 fields per level in a contact view. You can select which of those fields you want to display and where you want to display them. You do not have to place every field in your database on the screen; conversely, you may use the same field on multiple pages and views. (Any changes to the field on any page on which it appears will update the data in the field on all pages.)

- You can organize multiple views in a three-level hierarchy linked by level of detail.

  There are many possible arrangements for your database, depending on what information you need to associate. For example, a company may deal with several large companies, and have multiple contact's at each. In this case a database may be designed to contain company information on Level 1, contact information on Level 2, and details on individual contracts on Level 3. A contractor may do several special projects for large companies. In this case, a database may be designed to contain the company's data on Level 1, a record on Level 2 for each job, and expenses for each job on Level 3. A law firm may have a number of attorneys, each with their own clients. In this case a database may be designed to contain the attorney on Level 1, the clients on Level 2, and each case on Level 3.

  When designing your database, give some thought about what information needs to be associated with what other information and plan your levels accordingly.

- You can control the appearance of your pages.

You may select the color, font, and size of your pages. You can add boxes and lines to your page to set off important data. You can add pictures to the page, or have a background picture as a wallpaper. You start with a blank page—what you put on it is totally in your control.

- You can control layout of your fields.

  You decide where to place a field on the screen and its size. For example, you may want to match on-screen layout to the flow of a branch script, so that you can enter data as you work through your pitch.

- You can add on-screen prompts to help you remember what goes into a field and how to enter it.

- You can add a sizable notepad area to any page to allow you to jot free-form notes as you talk to a contact.

- You can view lists of documents or activities linked to a record.

- You can “ roll up” field entries from a lower level (child record).

  Sometimes you may want to see a summary of specific information from a lower level without having to go to that level.

  For example, you might have five outstanding contracts with a client. While looking at that client’s customer data, you might want to see how many contracts you have, and their expiration dates, but not other contract details. Assuming that “contract number” and “expiration date” are fields on the sales contract level, you can design your customer view so that a list of sales contract numbers and their expiration dates appears on your customer data screen. That way, as the contract expiration date approaches, you can flip to the contract details on the level below.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_is_a_Contact_View)<<1} What is a Contact View?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Why_You_Would_Want_to_Create_or_Customize_a_View)<<1} Why You Would Want to Create or Customize a View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_ll_Need)<<1} What You’ll Need

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Cannot_Do)<<1} What You Cannot Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Designing_Your_Contact_View)<<1} Designing Your Contact View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Planning_Your_Contact_Views)<<1} Planning Your Contact Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

## What You Cannot Do with the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- You cannot give two different *contact views* the same name.

  It only stands to reason–every paper form has a unique name, or a unique number, so that you know which one to fill out. Your TeleMagic views also need unique names, so that TeleMagic can find and open the view you want to fill out. However, view names need only vary by one character. For example, you could name a series of views named SCRIPTA, SCRIPTB, SCRIPTC, etc., with no problem.

- You cannot give different *pages* of the same contact view the same name.

  If TeleMagic is "looking at" a view, it must have some way of telling which page is which within that view. However, you can use the same name for different pages on different views. For example, you could use PAGE1, PAGE2, PAGE3 as page names within a view called COMPANY DATA (because each page name is unique). At the same time, you could use PAGE1, PAGE2, PAGE3 again as page names within a view called CUSTOMER DATA (because CUSTOMER DATA is a different view).

- You cannot make a page bigger than the space between the Contact Manager Toolbar docking port at the bottom of the screen and the System Toolbar docking port at the top of the screen. (Referring to the docking ports where the respective toolbars are located by default.)

  TeleMagic allows you to create as many pages as you need for your view, but it limits the size of each page to what will fit on your screen. If you need more than one screen full of information in your view, you must create another page.

  If you create a contact screen that fills a high resolution screen display, you will not be able to edit it on a lower resolution screen.

  A typical SVGA screen displays 800 X 600 pixels. A VGA screen displays only 640 X 480 (the minimum system requirement for TeleMagic for Windows). If you create a contact page on a SVGA screen that can display 800 X 600 pixels, it will be "too big" to fit on a 640 X 480 VGA screen because it will consist of too many pixels. In this case, when a user opens the page on a VGA screen, the right and bottom edges will be cut off—the user will be unable to view information in this area. Additionally, you will not be able to edit a page in the Screen Designer if it will not fit on your resolution. If you want to be able to edit your page on a low resolution screen, you must make it small enough to fit within the lower resolution screen's size limits.

- You cannot make a contact page smaller than approximately ¾ inch by ¾ inch.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_is_a_Contact_View)<<1} What is a Contact View?
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

# Designing Your Contact View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Contact view design is a six-part process:

1) Planning your contact views, either on paper or in a graphics program such as Paintbrush or Paint.
2) Adding fields to the database, if you have not done so already. It is recommended that this be done prior to screen design. (This process is described in detail in the Creating and Defining Fields topic.)
3) Starting the Screen Designer.
4) Placing text, and objects, such as fields, pictures, and rollup lists on the screen.
5) Completing layout, including moving, sizing and layering text and objects, drawing lines, and customizing fonts and colors.
6) Saving your work.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Planning_Your_Contact_Views)<<1} Planning Your Contact Views

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

# Planning Your Contact Views

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Before you start the Screen Designer, you should thoroughly plan your screen composition and layout. How many views do you want? What data should appear in each? How many pages do you want for each? What data should appear on each page? Planning ahead now will save much work later.

The sample databases provided with TeleMagic give good examples of possible layouts for your views. For example, the Documentation Database has three views (one for each level), two with two pages and one with three pages. The first view contains company data; the second contact data, and the third product and contract information.

Once you have planned your views, sketch them on paper or in a graphics program. To use the Screen Designer most efficiently, give yourself a model from which to work.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_is_a_Contact_View)<<1} What is a Contact View?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Why_You_Would_Want_to_Create_or_Customize_a_View)<<1} Why You Would Want to Create or Customize a View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_ll_Need)<<1} What You'll Need

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Can_Do)<<1} What You Can Do

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_What_You_Cannot_Do)<<1} What You Cannot Do

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Starting_the_Screen_Designer)<<1} Starting the Screen Designer

## Starting the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

If you are new to database screen design, it is recommended that you practice design skills before attempting to alter your existing database. Consider working on a copy of the database you want to change; in this way you retain the original layout in the event that you are not satisfied with your changes.

Before you open the Screen Designer, you should turn off your screen saver if you are using one. You should also close any applications that come up automatically (such as e-mail programs that pop up alerts). TeleMagic will automatically close its own alarm program while you are in the Screen Designer and re-open it when you exit.

### To Open the Screen Designer:

- From the **Contact Manager** menu, select **Contact Utilities**, **Screen Designer**.

  The Screen Designer Window will open.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_The_Designer_Window)<<1} The Designer Window

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Navigating_in_the_Designer)<<1} Navigating in the Designer

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# The Screen Designer Window

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The Screen Designer window is similar in appearance to the Contact Manager window. You will notice that the standard TeleMagic menu has been replaced by the Screen Designer's menu. This menu offers options applicable to screen design. The TeleMagic toolbar has been replaced with a set of editing tools.

The control bar at the bottom of the window allows you to navigate through the Screen Designer and offers quick access to some of the more common Screen Designer tools:

The Screen Designer toolbar and control bar can be moved and resized in the same manner as Contact Manager toolbars, but their tool sets cannot be edited.

The center section is one page of a view. If you have an existing view, you will see the last page you had open in the Contact Manager. If you are working with a database with no existing views, you will be at a blank page.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Navigating_in_the_Designer)<<1} Navigating in the Designer

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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Navigating in the Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The Screen Designer allows you to navigate quickly between existing views , pages , and levels .

The level selector buttons on the control bar allow you to quickly add and edit views on any level of your database. To access the views and pages available on any level, simply click the appropriate level selector button.

The `View` drop-down list on the control bar allows you to quickly select any view on the current level. To open a view, simply select the view from the list.

The `Page` drop-down list on the control bar allows you to quickly select any page in the current view. To open a page, simply select it from the list. (Pressing PAGE UP and PAGE DOWN on the keyboard will move you to the previous and next pages, respectively.)

Using these tools, you can move quickly among all of the existing pages in your database, or navigate to the desired level and view when adding a new page.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_The_Designer_Window)<<1} The Designer Window
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_Adding_Views_and_Pages)<<1} Adding Views and Pages
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## Adding Screen Views and Pages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Adding_Screen_Views_and_Pages_Note)<<1}

By now you should already have decided how many views you will need, and have a good idea of how many pages you want on each view. Remember, you will need to add a view for every database level you want to use.

To Add a New View:
To Add a Page:
To Copy a View or Page:

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Add a New Screen View:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. From the Screen Designer control bar, select the level to which you want to add the view:

   -

2. Click **Add**.

   The Add View or Page dialog box will open.

3. Select **Add View**.

   The Page Properties dialog box will appear over a new blank page.

4. See Setting Page Properties for information on naming the view and first page, and establishing page appearance defaults.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Add_a_Page)<<1} To Add a Page:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Copy_a_View_or_Page)<<1} To Copy a View or Page:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## To Add a New Screen Page:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_To_Add_a_New_Screen_Page_Note)<<1}

1. From the Screen Designer control bar, select the level to which you want to add.

2. From the `View:` drop-down list, select the contact view to which you want to add the page.

3. Click **Add**.

   The Add View or Page dialog box will open.

4. Select **Add Page**.

   A blank page will be added to the current view. The Page Properties dialog box will appear where you can name the page and set appearance defaults.

5. See Setting Page Properties for information on naming the page, and establishing page appearance defaults.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Copy_a_View_or_Page)<<1} To Copy a View or Page:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Add_a_New_View)<<1} To Add a New View
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Copy a Screen View or Page:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_To_Copy_a_Screen_View_or_Page_Note)< <1}

1. Go to the page you want to copy and click **Copy** on the control bar.

   The Copy View or Page dialog box will open.

2. If you want to make a copy of the current page and associate it with the current view, select `Current page to a new page in an existing view`.

**or** If you want to create a new view with the current page, select `Current page to a new page in a new view`.

**or** If you want to copy the entire view to a new view, select `All pages in current view to a new view`.

   If you have chosen to copy the current page to a new view, or to copy the entire view, the `New view name:` field will become available.

3. Enter a name for the view that will be created in the `New view name:` field.

   If you have chosen to copy a page to the current view or a new view, the `New page name` field will become available.

4. Enter a name for the page that will be created in the `New page name` field.

5. If you have selected to copy the page to an existing view, select the desired view from the `Existing view` name field.

6. If you want to go to the new view or page after it has been copied, select the `Go to new view or page after copying` check box.

**or** If you want to remain at the original copy of the page, unmark this check box.

7. Click **OK**.

   A message will appear informing you that the view or page was copied.

8. Click **OK** to acknowledge the message.

   A new page or view will be added with the objects and properties of the source page or view.

9. If you want to set properties for the new page or view (such as naming the page or view), see Setting Page Properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Add_a_New_View)<<1} To Add a New View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Add_a_Page)<<1} To Add a Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Adding_Views_and_Pages)<<1} Adding Views and Pages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Setting Screen Page Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Page properties are the setup options available for the page. They include such items as the size of the page, the color of the page, and the default font for items placed on the page. You will also name your view in the Page Properties dialog box. (Aside from the name, there are no view specific properties.)

## To Set Page Properties:

1. Add a new page or view. The Page Properties dialog box will appear.

   **or** With your mouse, right click on the page.

   **or** From the **Page** menu, select **Properties**.

   The Page Properties dialog box will appear.

   If you have added a page to the existing view, the `View` field will display the name of the view to which the page is attached.

2. Give your new view a name, or edit the name of an existing view in the `View:` field. The name may be up to 15 characters long. If there are multiple pages in the view, any changes made here will be reflected in the Page Properties dialog box for all pages in the view.

3. Enter the name for the current page in the `Page:` field. The name may be up to 15 characters long.

4. Select the font you want to use as the default for this page.

5. From the `Style` drop-down list, select any special font formatting you want use by default.

6. Select a default font size from the `Size` drop-down list.

7. If you want to use a preset page size, select it from the `Preset` drop-down list. A preset size will fill the entire space available for the contact screen for the selected monitor resolution. You will be able to select the preset screen size for the resolution in use on your current workstation and lower resolutions. (Higher resolutions will not be available on the list.)

**WARNING!**

Keep in mind the resolutions in use by other TeleMagic users who may want to use this view. If you are on a machine that displays 800 by 600 pixels and set this as your page size, the page will be cut off on the monitor of a user displaying 640 by 480 pixels. Set your page size to the lowest common denominator for all users who may need to access the view.

**or** If you want to specify a custom size, enter it in the `Height` and `Width` fields. These fields measure height and width by the average size of a character in your default font.

The Screen Designer grid allows you to see how objects on your screen are aligning and gives you the option of automatically aligning objects to the grid.

8. If you want your grid to be the height and width of one character in your default font, mark the `Use Font Dimensions` check box.

**or** If you want to specify a custom grid size, unmark `Use Font Dimensions` and set the height and width in pixels in the `Vertical Pixels` and `Horizontal Pixels` fields.

9. If you want to use a .bmp graphic as a background wallpaper on the page, enter the path and file name in the `Name` field under `Wallpaper Bitmap File` or click **Find** to locate the file from a Windows Open dialog box. If the selected bitmap image is larger than the page, it will be cropped at the bottom and right edges. If it is smaller than the page, it will be tiled.

10. Select a `Pen Color` from the displayed color options. The pen color will be used for fonts and object outlines.

11. Select a `Fill Color` from the displayed color options. The fill color will be used as the background color of the screen, as well as for the center of objects drawn on the screen.

12. When satisfied with your screen properties, select **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Manually_Adjust_the_Page_Size)<<1} To Manually Adjust the Page Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Adding_Views_and_Pages)<<1} Adding Views and Pages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Manually Adjust the Screen Page Size:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

You can change the size of the page by dragging an edge as you would with an object.

1. Place your cursor near one edge.

   Your mouse will turn into a two headed arrow:

2. Drag the page to the desired size.

**Warning!**

It is possible to reduce the size of the page so that objects that have already been placed are no longer displayed, or are cut off. The objects are not lost, you can re-extend the dimensions of the page to accommodate the objects.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Setting_Page_Properties)<<1} Setting Page Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Adding_Views_and_Pages)<<1} Adding Views and Pages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

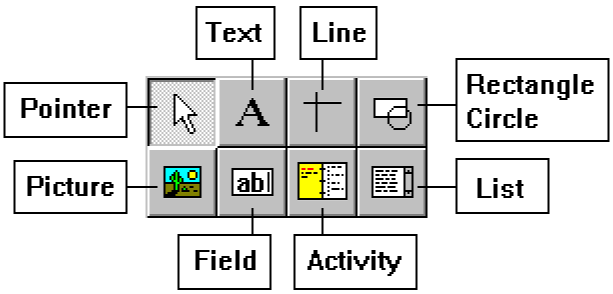
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Placing Objects on the Screen Page

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Placing_Objects_on_the_Screen_Page_Note)<<1}

Objects are placed on a page using the object placement tools:




Text Tool
Field Tool
Activity Field Tool
Rollup Tools
Line Tool
Rectangle/Circle Tool
Picture Tool

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Adding_Views_and_Pages)<<1} Adding Views and Pages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Screen Designer: Pointer Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

•

The pointer tool is used to select, move, and size objects on the page.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Selecting_Deselecting_and_Rubber_Banding_Objects)<<1} Selecting, Deselecting, and Rubber Banding Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Text Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

An important step in screen layout is adding text to your contact page. Text can be used to manually add field prompts, or to add instructions or descriptions to a page. For example, you might want to tell users that certain fields on the screen must be filled in. In this case, you could add a text message “All Fields Colored Blue Are Mandatory.” Or you may want to instruct users where to find the information required for certain fields.

## To Add Text to a Contact Page:

1. Click the Text button
2. Point to the approximate location on the blank contact page for your text, then click.

   The Text Contents dialog box will appear.
3. Type the text, then click **OK**.

   **Example:** Company Information:

   TeleMagic will place the label on your contact page.
4. To add another piece of text, repeat steps 1 through 3, typing your next label into the Text Contents dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Text_Properties)<<1} Text Properties
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

## Screen Designer: Text Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Text properties allow you to control the appearance of your text and the box that contains it.

### To Set Text Properties:

1. With your mouse, right-click on the text whose properties you want to set.

**or** Select the text and choose **Properties** from the **Object** menu.

The Text Properties dialog box will open.

2. If necessary, edit the text displayed in the `Text` field.

3. Select the font in which you want the text displayed in the `Font` field.

4. Select the point size of the font in the `Size` field.

5. If you want any special formatting used for the text, select it from the `Style` field.

6. Use the `Justification` drop-down list to control how the text is aligned in the text region.
   - Select `Left` if you want the text aligned to the left-hand side of the text region.
   - Select `Center` if you want text centered between the left and right-hand side of the text region.
   - Select `Right` if you want text aligned to the right-hand side of the text region.

7. Use the `Transparency` drop-down list to control whether the text region is transparent or opaque.
   - Select `Opaque` if you want the area defined by the text region to appear as a solid rectangle. This will give the appearance of placing the text in a box. Any objects located behind this box will not be visible.
   - Select `Transparent` if you want the area defined by the text region to be invisible. This will give the appearance of placing the text directly on the screen with no defining box. Any objects located behind the text will be visible, except where the text itself actually covers them.

8. Select a color for the text from the `Pen Color` selections.

9. If you are using an opaque text region, select a background color for region from the `Fill Color` selections.

10. Select **OK** to save the text properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Text_Tool)<<1} Adding Text
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Field Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Probably the most common thing you will want to add to your screens will be database fields. The field tool allows you to add character, numeric, unique number, date, phone, fax, pager, OLE , and memo fields to the screen.

Creating fields is discussed in detail in the Creating and Defining Fields topic. In addition to placing existing fields onto your screen, you can create fields directly in the Screen Designer as you add them to the page.

The following instructions assume that you are working with fields that already exist. If you do need to create any fields while working in the Screen Designer, the basic steps are the same as the ones you would follow when accessing the Edit the Field List dialog box from the **File** menu.

### To Add a Data Field to a Contact Screen:

1. Click the field tool button.
2. Point to the approximate location on the blank page for your data field and click on the screen. When the field is added, the text region will be large enough to contain the entire contents of the field in the selected font.

   The Select Field dialog box will appear.

   The list of fields will include all the database fields from the level on which you are currently working (as indicated by the selected radio button above the field list).
3. If you are on Level 2 or Level 3, and you want to use a field from a higher level, select the appropriate radio button.
4. Use the scroll arrows to locate the field you want to use.
5. If you want to display the field’s prompt, mark the `Display Prompt with Field` check box.
6. Click **OK**.
7. Repeat steps 2 through 6 for each field you want to add.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Field_Properties)<<1} Field Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Text_Properties)<<1} Text Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Activity_Fields_Tool)<<1} Adding Activity Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Field Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Field properties allow you to set specific parameters for the appearance of fields, including the font, color, and justification.

## To Set Field Properties:

1. Right-click on the field whose properties you want to set.

**or** Highlight the field and select **Properties** from the **Object** menu.

   The Field Properties dialog box will open.

2. Select the font you want to use for data entered into the field in the `Font` field.
3. Select the point size for the font in the `Size` field.
4. If you want any special formatting used for the text, select it from the `Style` field.
5. Use the `Align` drop-down list to control where in the field text is placed in the event that it does not fill the field.
   - Select `Left` if you want the text aligned to the left-hand side of the field.
   - Select `Center` if you want text centered between the left and right-hand side of the field.
   - Select `Right` if you want text aligned to the right-hand side of the field.

   If your field type is a date field, you have the option of placing a date picker icon next to the field. The icon will allow you access to a Go To Date dialog box when entering dates into the field.

6. If you are setting properties for a date field and want a date picker icon attached to the field, mark the `Display Icon` check box.
7. Use the `Transparency` drop-down list to control whether the field is transparent or opaque.
   - Select `Opaque` if you want the area defined by the field display to appear as a solid rectangle. If you select this option, any objects located behind the field will not be visible.
   - Select `Transparent` if you want the area defined by the field display to be invisible, with only the field text showing. If you select this option, objects located behind the field will be visible with the exception

of anything directly covered by the field text.

8. Select a color for the field text from the `Pen Color` selections.

9. Select a background color for the field from the `Fill Color` selections.

10. Select **OK** to save the field properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Field_Tool)<<1} Adding Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Text_Properties)<<1} Text Properties
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: OLE Field Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

If you add an OLE field to your page, the field will use slightly different properties than other field types. (For more on OLE fields, see the Entering and Editing Pictures, Charts, Spreadsheets, Documents, Sounds and Other OLE Objects topic.)

## To Set OLE Field Properties:

1. Right-click on the field whose properties you want to set.

**or** Highlight the field and select **Properties** from the **Object** menu.

Adding an OLE field to your page gives you a frame on the screen that you can use to access linked or embedded objects. The object in the frame will possibly be different for each record.

2. Use the `Alignment` drop-down list to select how the OLE object should fit the frame in the event that it does not fill it exactly.

- Select `Scale` if you want to size the object so that it does not extend beyond the size of the frame, while it retains its original shape. The image will fill as much of the frame as possible but retain its relative proportions. (This is important if you are displaying a picture in the OLE frame, since it will protect your picture from vertical or horizontal distortion.)

  **Example:** If you insert a picture this size:

  into an OLE frame this size:

  the final picture will be this size:

- Select `Stretch` if you want the OLE object to exactly fit the frame you have drawn. If the frame is a different shape and/or size than the object, the object will be resized and/or reshaped to fit the frame. If necessary, it will be distorted vertically or horizontally to fit the frame.

  **Example:** If you insert a picture this size:

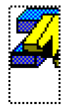
  into an OLE frame this size:

  the final picture will be this size:

- Select `Crop` if you want the object to retain the proportions of the original image without being distorted horizontally or vertically. If the OLE object is larger than the frame, it will be trimmed on the bottom and left edges so it does not extend beyond the edges of the frame. If it is smaller than the frame, it will not be affected.

**Example:** If you insert a picture this size: •

into an OLE frame this size: •

the final picture will be this size: 

- Select `Center` if you want the object centered horizontally and vertically in the frame while it retains its original proportions. If the frame is smaller than the OLE object, the object will be trimmed to fit the frame. If it does not fit horizontally, it will be trimmed equally on the left and right edges. If it does not fit vertically, it will be trimmed equally on the top and bottom edges.

**Example:** If you insert a picture this size: •

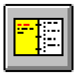
into an OLE frame this size: •

the final picture will appear like this: 

3. Select **OK** to save your OLE properties.

# Screen Designer: Activity Field Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}



Activity fields are special fields designed to display information taken from the Activity Manager. These fields give you quick access to such data as the first, last, or next activity of a specified type linked to a contact. Activity fields are linked to the Activity Manager, so that any time you link an activity to a contact, the date and time of that activity are displayed in the respective activity field.

## To Add an Activity Field to a Contact Screen:

1. Click the Activity Field button.

2. Point to the approximate location on the blank contact page where you want the top left corner of the field to begin, and click.

   The Activity Field dialog box will open.

3. Select from the `Display the:` drop-down list using the following guidelines:

   - Select `First Completed` to display the first activity that was completed for the contact.
   - Select `Last Completed` to display the most recently completed activity for the contact.
   - Select `Next Incomplete` to display the next pending activity for the contact.

4. If you want to limit the activities displayed in the field to a specific kind, enter it into the `activity that is a:` field.

   Enter the field type exactly as it appears in the `Type` field of the Activity dialog box in the Activity Manager, or press F2 to access the `Type` field's list box.. Only activities that match the specified type will be used.

**or** If you want the field to display first/last/next dates for any activity, no matter the type, mark the `Any activity type for the contact` checkbox.

5. When finished, choose **OK**.

   The activity field will appear on the contact page.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SCREENS_Activity_Field_Properties)<<1} Activity Field Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Field_Tool)<<1} Adding Data Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Activity Field Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

You can set properties to control the font, color, and transparency of your activity fields.

## To Set Activity Field Properties:

1. Right-click on the field whose properties you want to set.

**or** Select the field and choose **Properties** from the **Object** menu.

The Field Properties dialog box will appear. This dialog contains the same options that are available when you set properties for a standard TeleMagic field.

2. See Field Properties for instructions.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Activity_Fields_Tool)<<1} Adding Activity Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Rollup Tools

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Rollup lists allow you to place lists of information related to a contact that is taken from other areas of TeleMagic. Rollups include: contact rollups, which display a list of a record’s child records; activity rollups, which display linked activities; and document rollups, which display linked documents.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Contact_Rollup)<<1} Contact Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Activity_Rollup)<<1} Activity Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Document_Rollup)<<1} Document Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Rollup_List_Fields)<<1} Rollup List Fields

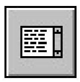
# Screen Designer: Contact Rollup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Sometimes, you need to be able to “roll up” information from lower levels into a list on the parent record. Contact rollup lists allow you to select fields from a lower level and display them in a scrolling list. For example, on the Documentation database Company Data screen, there is a “rollup” of all the contacts for that company. The information in this rollup list is “pulled” from the Level 2 records associated with that company.

Rollup lists only work from the lower levels to higher levels. You can roll Level 2 records onto a Level 1 page, or Level 3 records onto a Level 1 or Level 2 page, but you cannot roll up anything onto a Level 3 page because there is no Level 4 in any TeleMagic database.

## To Add a Rollup (Child) List to a Contact Screen:

1. Click the List Tool 

   .

2. With your mouse, click and drag to the approximate size and location you want for the rollup list.

   The List Type dialog box will open.

3. Select the type of list you would like to add.

   If you are adding a Contact list to level 1 of a three-level database, a Select Level dialog box will open. Select the level from which the contents of the list will be drawn.

   The Expression Builder dialog box will appear.

4. From the `Fields` list, select the first field you want displayed in your rollup list.

   **Example:** Contact Name: {contact}.

**WARNING!**
Avoid placing sensitive information in a rollup list when you are deciding which fields to use. Rollup lists do not recognize field-level security settings. This means that users will see *all* the fields in a rollup list, even when they do not ordinarily have rights to view one or more of those fields. You can restrict access to the list, but not to specific items on the list.

   The field name and its database level will appear in the `Create a character or memo expression` text box followed by a sign.

   **Example:** contact2.contact +

5. Type " (opening quotation marks), then three to five blank spaces, then " (closing quotation marks), then another sign. (This will place blank spaces between the fields in

the display, allowing easier viewing of the field data.)

6. From the `Fields:` list, select the next field for your rollup list.

7. Repeat steps 3 to 5 as necessary. Include any other expression parameters you need. (For more on expression building, see the Expression Builder topic.)

8. When you finish creating your expression, choose **OK**.

   The Expression Builder will close. The List Properties dialog box will open.

9. The `Display:` field will contain the expression that you just created. You can change the expression by clicking the **Expression** button next to this field. This will re-open the Expression Builder and allow you to edit the expression as necessary.

10. You can create a filter expression to restrict what information should be displayed in the list. To create a filter, mark the `Filter` checkbox.

    The Expression Builder will open. The **Expression** button for this field will become available. You can change the filter later, as required.

11. You can create an expression to restrict access to the list. To create a security expression, mark the `Security` checkbox.

    The Expression Builder will open. The **Expression** button for this field will become available. You can change the filter later, as required.

12. To change the font, click the **Change Font** button. (The currently selected font is indicated to the right of the **Change Font** button.)

    The Font dialog box will open.

13. Select the desired font, font style, and size from the indicated lists. Click **OK** to close the Font dialog box and return to the List Properties dialog box.

14. To change the pen color, click the **Color** button in the `Pen Color` section. (The currently selected pen color is indicated to the left of this button.)

    A Color dialog box will open. You can either select a pre-defined color, or define a custom color .

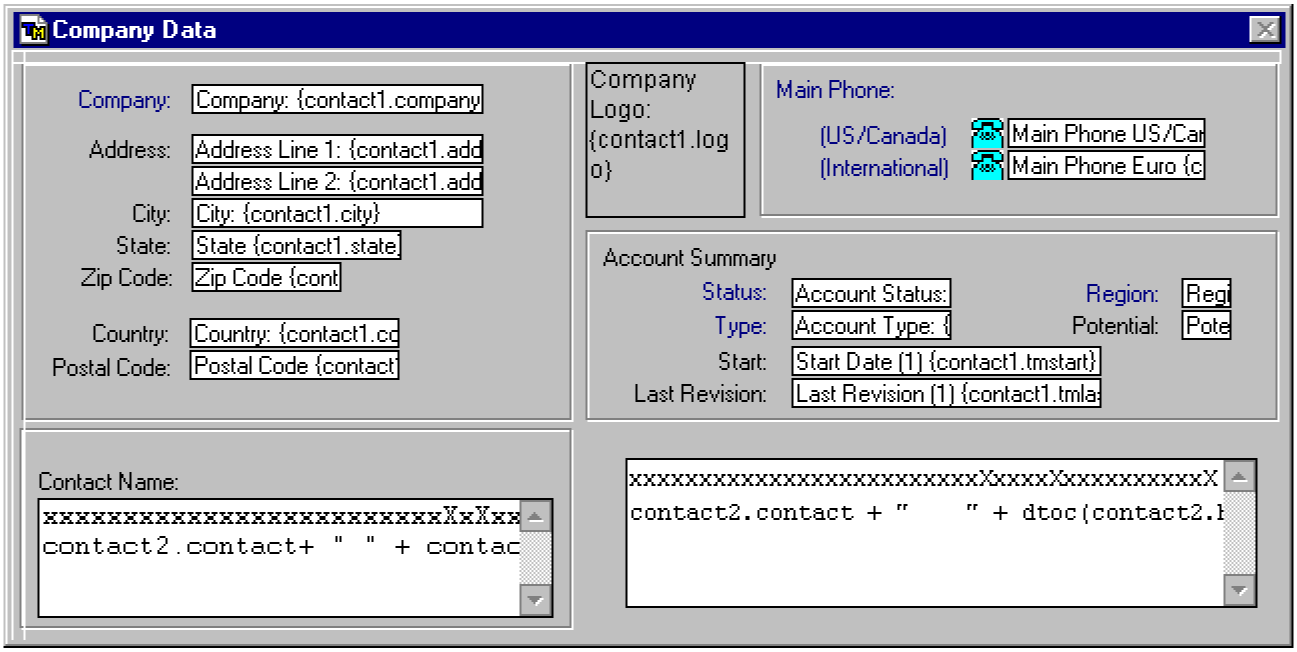
15. To change the fill color, click the **Color** button in the `Fill Color` section. (The currently selected fill color is indicated to the left of this button.)

    A Color dialog box will open. You can either select a pre-defined color, or define a custom color .

16. Select the radio button corresponding to the disired field style for this list, either plain or 3D.

17. Click **OK**.

    The rollup list will appear on your contact page:




**Sample Rollup List**

The scroll box will display the expression that defines the fields that will be displayed. Above this, Xs will show the amount of space that will be allotted for the data in each field. This display allows you to align any text you want to use as labels to indicate the contents of each field on the screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rollup_List_Properties)<<1} Rollup List Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Activity_Rollup)<<1} Activity Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Document_Rollup)<<1} Document Rollup

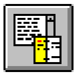
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Rollup_List_Fields)<<1} Rollup List Fields

# Screen Designer: Activity Rollup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}



Activity rollup lists allow you to see a list of activities linked to a contact. This enables you to view directly on the screen a list of the same activities that you would see by clicking the **Activities** button on the control bar. Adding this information as a rollup, however, gives you the advantage of being able to select what activity information is included in the list. Additionally, it gives you filtering and sorting options that are not available from the standard Activity List. (See Rollup List Properties later in this section, for more information on filtering and sorting options.)

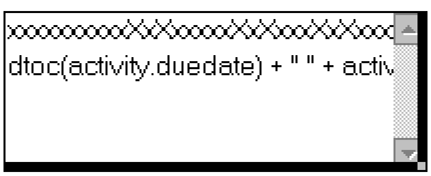
## To Add an Activity Rollup List to a Contact Page:

1. Click the activity rollup button.
2. With your mouse, click and drag to the approximate size and location you want for the activity rollup list.

   The Expression Builder dialog box will open, with the default activity list expression displayed. This expression will display date, time, user, and description for activities linked to a contact.

- 3. If you want, edit the expression (no changes are necessary). (See Expression Builder for help with building expressions.) When finished, choose **OK**.

   TeleMagic will place the rollup on the screen:




**Sample Activity Rollup**

The scroll box will display your expression. Above this, Xs will show the amount of space that will be allotted for the data in each field. This display allows you to align any text you want to use as a label to indicate the contents of each field on the screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rollup_List_Properties)<<1} Rollup List Properties

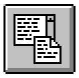
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Contact_Rollup)<<1} Contact Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Document_Rollup)<<1} Document Rollup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Rollup_List_Fields)<<1} Rollup List Fields

# Screen Designer: Document Rollup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}



The document rollup displays a list of all of the documents linked to a contact.

## To Add a Document Rollup List to a Contact Page:

1. Click the document rollup button.

2. With your mouse, click and drag to the approximate size and location you want for the document rollup list.

   The Expression Builder dialog box will open displaying the default expression. This can be edited.

   When you add a word processing document in TeleMagic, the entries you make in the Add dialog box are stored in a table named Wpdesc. The `Fields` list will allow you to select from the fields in this table.

3. From the `Fields` list, select the fields you want displayed in the rollup. (Build the expression in the same way you would build an expression using fields from the Contact or Activity Manager. See Expression Builder for help with building expressions.

4. When you are satisfied with your expression, choose **OK**.

   TeleMagic will place the rollup on the screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rollup_List_Properties)<<1} Rollup List Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Contact_Rollup)<<1} Contact Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Activity_Rollup)<<1} Activity Rollup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Rollup_List_Fields)<<1} Rollup List Fields

# Screen Designer: Rollup List Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Rollup list properties allow you to control the appearance of your lists, the font used for the text, which records are included, and how they are sorted.

## To Set Rollup List Properties:

1. With your mouse, right-click on the scroll box for the rollup list whose properties you want to set.

**or** Select the rollup and choose **Properties** from the **Object** menu.

The List Properties Dialog Box dialog box will open.

The `Display` field will show the expression that was added when the rollup was created.

2. If you need to alter the expression, click **Expression…** and use the Expression Builder (Activity Rollup) dialog box to make any needed changes.

3. If you want to limit the information that is displayed in the rollup list, mark the `Filter` check box.

The Expression Builder will open.

4. Create an expression to define the information you want included in the rollup. Click **OK** when finished to save the expression and return to the List Properties dialog box.

**Example:** If you were creating a filter expression for a contact rollup list, and wanted to limit the child records included in the list to only show records with data in the Documentation Database's Contract Number field (indicating that there is a contract with the contact), you would create this expression: **!empty(contact3.conno)**.

5. If you want set security to limit the records that are displayed in the rollup list for non-supervisor users, mark the `Security` check box.

**WARNING!**
Rollup lists will bypass the standard TeleMagic record level security. If there are sensitive records in your database, create security for the rollup list to limit non-supervisor access.

The Expression Builder will open.

6. Create a security expression for the rollup list. Click **OK** when finished to save the expression and return to the List Properties dialog box.

7. Use the `Sort` drop-down box list to control the order in

- which records will be placed on the list. Select:
  - None if you want the list items to display in natural order. This is the order in which the item was added in TeleMagic.
  - List if you want list items to display according to the first field selected for your Display expression. (If the first field is a character field, items will be in alphabetical order; if it is a date field, they will be in chronological order, etc.)
  - Expr. if you want to access the Expression Builder dialog box where you can create a sort expression. When you select Expr., the Expression Builder will open.

  If you select List or Expr., the Ascending/Descending drop-down list will become available.

8. Select Ascending if you want the list to display from A to Z, 0 to 9, or oldest to most recent (depending on the field type).

**or** Select Descending if you want the list to display from Z to A, 9 to 0, or most recent to oldest.

9. From the Font drop-down lists, select the font in which the contents of the rollup should be displayed.
10. If you want any special formatting used for the text, select it from the Style drop-down list.
11. Select the point size of the text from the Size drop-down list.
12. Select a color for the text in the rollup from the Pen Color selections.
13. Select a background color for the rollup from the Fill Color selections.
14. When you are satisfied with your selections, click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rollup_Tools)<<1} Adding Rollup Lists
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Rollup_List_Fields)<<1} Rollup List Fields

# Screen Designer: Line Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The line tool allows you to draw horizontal or vertical lines on your page.

## To Draw a Line:

1. Click on the line tool.

**or** Double-click on the line tool to draw multiple lines. The tool will dim.

2. Click on the contact page and drag to the desired length of the line.

3. If you are drawing multiple lines, repeat this process for each line you want to draw. When you have finished, click on another tool to deselect the line tool.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Line_Properties)<<1} Line Properties
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Line Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Line properties allow you to control the size and color of lines on the screen.

## To Set Line Properties:

1. With your mouse, right-click on the line whose properties you want to set.

**or** Select the line and choose **Properties** from the **Object** menu.

The Line Properties dialog box will open.

2. To set the thickness of the line, select a point size from the `Size` drop-down list.
3. Select a color for the line from the `Pen Color` selections.
4. Click **OK** to save your settings.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Line_Tool)<<1} Adding Lines
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Rectangle/Circle Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

To Draw a Rectangle:
To Draw a Circle:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rectangle_and_Circle_Properties)<<1} Rectangle and Circle Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# To Draw a Rectangle in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Click on the rectangle/circle tool.

**or** Double-click on the rectangle/circle tool to draw multiple rectangles.

2. Click on the contact page and drag to the desired size of the rectangle.

3. If you are drawing multiple rectangles, repeat this process for each rectangle you want to draw. When you have finished, click on another tool to deselect the rectangle/circle tool.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rectangle_and_Circle_Properties)<<1} Rectangle and Circle Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Draw_a_Circle)<<1} To Draw a Circle:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# To Draw a Circle in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Click on the rectangle/circle tool.

**or** Double-click on the rectangle/circle tool to draw multiple circles.

2. Click on the contact page and drag to the desired size of the circle.

   It will appear as a rectangle.

3. Right click on the rectangle.

   The Rectangle Properties dialog box will open.

4. In the `Roundness` field, select the degree of roundness, between 1 and 99, you want for your circle. 1 will cause a nearly imperceptible rounding of the edges; 99 will create an oval or circle, depending on whether you started with a rectangle or a square. (For more information on the properties available at this dialog box, see the Rectangle and Circle Properties topic.)

5. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rectangle_and_Circle_Properties)<<1} Rectangle and Circle Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Draw_a_Rectangle)<<1} To Draw a Rectangle:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Rectangle and Circle Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Rectangle and circle properties allow you to control the appearance of your rectangles and circles, and to create special 3-D effects.

## To Set Rectangle and Circle Properties:

1. Right-click on the rectangle or circle.

**or** Select the rectangle or circle and choose **Properties** from the **Object** menu.

The Rectangle Properties dialog box will open.

2. If your object is a rectangle or square, use the `Type` field if you want to create a 3-D effect.
   - Select `Normal` if you do not want to use any special effects.
   - Select `3D Inset` if you want the rectangle to appear indented on the page.

     **Example:** 
   - Select `3D Outset` if you want the rectangle to appear raised on the page.

     **Example:** 
3. Select the point size for the border of the rectangle from the `Size` drop-down list.
4. If you want to round the edges of a rectangle, select a degree of roundness from the `Roundness` drop-down list. Selecting 99 will create a circle or oval.
5. Use the `Mode` drop-down list to select the transparency of the rectangle or circle.
   - Select `Opaque` if you want the rectangle or circle to appear as a solid object. Objects placed behind it will not be visible.
   - Select `Transparent` if you would only like to view the outline of the rectangle or circle.
6. Select a color for the outline of the rectangle or circle from the `Pen Color` selections.
7. Select a color for the inside of the rectangle or circle from the `Fill Color` selections.
8. Select **OK** to save the object properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Rectangle_Circle_Tool)<<1} Adding Rectangles and Circles

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Picture Tool

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Screen_Designer_Picture_Tool_Note)<<1}

The picture tool allows you to place graphic pictures on your screen. Pictures can be used to illustrate a view with company logos, borders, backgrounds, or other graphics. Backgrounds can be placed on an entire screen, or for emphasis, behind a group of fields.

## To Add a Picture to a Contact Screen:

1. Click the picture button.

2. Click on the contact page and drag to the approximate size of your picture.

   The Picture Properties dialog box will appear.

3. In the `Name` field, enter the path and file name of the picture you want to use, or click **Find** to locate the picture using a Windows Open dialog. (The picture must be a Windows Bitmap file.)

   The picture will display in the `Preview` window.

   When you added the picture, you drew a frame on the page to contain the picture. This frame can be moved or sized according to your needs.

4. Use the `Alignment` drop-down list to select how the picture should fit the frame, in case it does not fill it exactly.

   - Select `Scale` if you want to size the picture so that it does not extend beyond the size of the frame, while still retaining its original shape. The image will fill as much of the frame as possible while keeping the relative proportions of the bitmap picture. This will protect your picture from vertical or horizontal distortion.

     **Example:** If you insert a picture this size:

     into a frame this size:

     the final picture will be this size:

   - Select `Stretch` if you want the picture to fit exactly the frame you have drawn. If the frame is a different shape and/or size than the picture, the picture will be resized and/or reshaped to fit the frame. If necessary, the picture will be distorted vertically or horizontally to fit the frame.

     **Example:** If you insert a picture this size:

the final picture will be this size: •

• Select `Crop` if you want the picture to retain the proportions of the original bitmap image without being distorted horizontally or vertically. If the picture is larger than the frame, it will be trimmed on the bottom and left edges so it does not extend beyond the edges of the frame. If it is smaller than the frame, it will not be affected.

**Example:** If you insert a picture this size: •

into a frame this size: •

the final picture will be this size: •

• Select `Center` if you want the picture centered horizontally and vertically in the frame while retaining its original proportions. If the frame is smaller than the picture, the picture will be trimmed to fit the frame. If it does not fit horizontally, it will be trimmed equally on the left and right edges. If it does not fit vertically, it will be trimmed equally on the top and bottom edges.

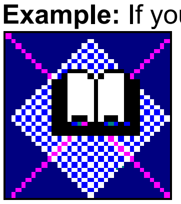
**Example:** If you insert a picture this size: •

into a frame this size: •

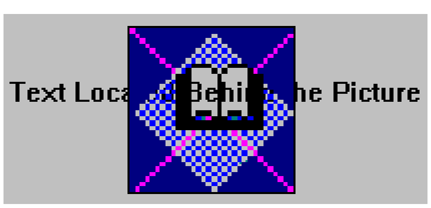
the final picture will appear like this: •

5. From the `Mode` drop-down list, select `Transparent` if you want any white areas of the picture to be invisible. Any objects behind the picture (including the fill color of the page) will be visible in any areas of the picture that were originally white.

   **Example:** If your original picture looks like this:

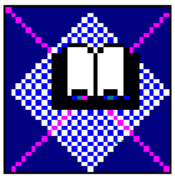
   and was placed in transparent mode on a gray background with text located behind the picture, it would appear like this:



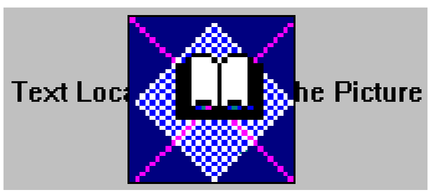

   Click here if you want to control what part of the picture is transparent.

**or** Select `Opaque` if you want the picture to cover completely any objects that are placed behind the area included in the bitmap. White areas of the picture will display as white. (If the frame extends beyond the actual picture, you will still be able to view objects placed behind the frame.)

For example, if your original picture looked like this:



and was placed in opaque mode on a gray background with text located behind the picture, it would look like this:




6. Select **OK** to save your picture and its properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Picture_Properties)<<1} Picture Properties
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

# Screen Designer: Picture Properties

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Picture properties are set when you first add a picture. If you later need to edit your selections, you can access picture properties.

## To Access Picture Properties:

1. Right-click on the picture.

   The Picture Properties dialog box will open.

   Follow the guidelines in To Add a Picture to a Contact Screen when changing picture properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Placing_Objects_on_the_Page)<<1} Placing Objects on the Page

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

## Completing Screen Design Layout

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Once you have placed all the text, fields, and objects required onto the contact page, you can complete screen layout. There are two aspects to completing screen layout: object properties and object placement. Object properties include any settings specific to the object, such as transparency, font, and color. Object placement is the object's relationship to the screen and other objects on the screen. This includes moving, sizing, and layering objects.

Selecting, Deselecting, and Rubber Banding Objects
Sizing, Moving, and Layering Objects
Deleting Objects
Saving Your Work
Edit Field Input Order
Working with the Pages in a View

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Selecting, Deselecting, and Rubber Banding Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

In order to manipulate an individual object on the screen, you must first select the object.

To Select an Object:
To Select Multiple Objects (Rubber Banding):
To Select All Objects in the Screen Designer:
To Deselect an Object:
To Deselect All Selected Objects:
To Invert Object Selection:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Select an Object in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Click the pointer button.
2. Click on the object you want to select.

   A dotted line will appear around the object:


Click hereTM_Q_Selected_Objects_in_the_Screen_Designer_Don_t_Appear_Selected_and_Vice_Versa if your object selection appears to be reversed.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_Multiple_Objects_Rubber_Banding)<<1} To Select Multiple Objects (Rubber Banding):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_All_Objects_in_the_Screen_Designer)<<1} To Select All Objects in the Screen Designer:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_an_Object)<<1} To Deselect an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_All_Selected_Objects)<<1} To Deselect All Selected Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Invert_Object_Selection)<<1} To Invert Object Selection:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

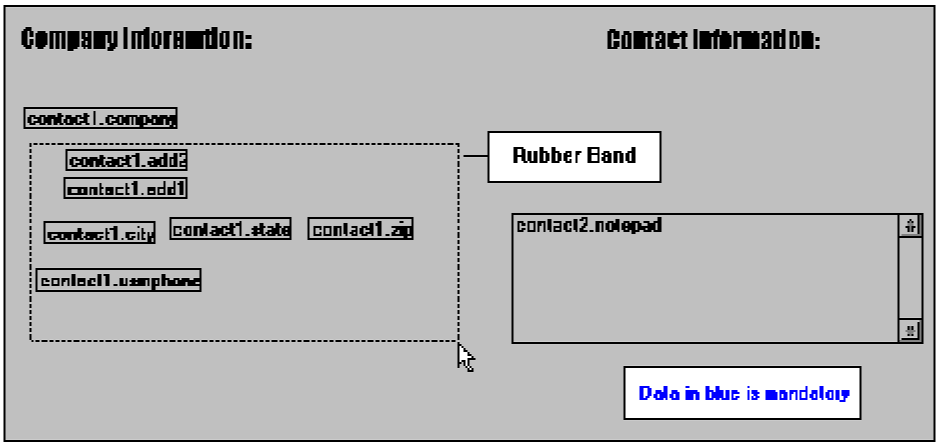
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Select Multiple Objects (Rubber Banding) in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Click the pointer button.
2. Point at an area on the page that does not currently have an object placed on it.
3. Hold down the mouse and drag.

   A dotted line will define the rubber banded area:




When you release the mouse, every item within the rubber banded area will be selected.

**or** • Hold down the right mouse button and click with the left mouse button on each item you want selected.

**or** • Click twice on the pointer tool.

It will turn into a rubber band tool.

Every object that you click on while this tool is in use will be selected. (Objects that are already selected will be deselected when you click on them while you are using this tool.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Setting_Multiple_Object_Properties)<<1} Setting Multiple Object Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_All_Objects_in_the_Screen_Designer)<<1} To Select All Objects in the Screen Designer:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_an_Object)<<1} To Select an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_an_Object)<<1} To Deselect an Object:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_All_Selected_Objects)<<1} To Deselect All Selected Objects:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Invert_Object_Selection)<<1} To Invert Object Selection:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## To Select All Objects in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- From the **Edit** menu, choose **Select All**, or press CTRL+A on the keyboard.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Setting_Multiple_Object_Properties)<<1} Setting Multiple Object Properties

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_Multiple_Objects_Rubber_Banding)<<1} To Select Multiple Objects (Rubber Banding):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_an_Object)<<1} To Select an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_an_Object)<<1} To Deselect an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_All_Selected_Objects)<<1} To Deselect All Selected Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Invert_Object_Selection)<<1} To Invert Object Selection:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Deselect an Object in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- With the pointer tool selected, hold down the right mouse button and click with the left mouse button on the object.

- Click twice on the pointer tool to access the rubber band tool and click on the object.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_All_Selected_Objects)<<1} To Deselect All Selected Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_an_Object)<<1} To Select an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_Multiple_Objects_Rubber_Banding)<<1} To Select Multiple Objects (Rubber Banding):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_All_Objects_in_the_Screen_Designer)<<1} To Select All Objects in the Screen Designer:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Invert_Object_Selection)<<1} To Invert Object Selection:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Deselect All Selected Objects in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- With the pointer tool selected, click anywhere off the objects.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_an_Object)<<1} To Deselect an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_an_Object)<<1} To Select an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_Multiple_Objects_Rubber_Banding)<<1} To Select Multiple Objects (Rubber Banding):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_All_Objects_in_the_Screen_Designer)<<1} To Select All Objects in the Screen Designer:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Invert_Object_Selection)<<1} To Invert Object Selection:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Invert Object Selection in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. With the pointer tool selected, hold down the right mouse button.

2. Press the left mouse button and rubber band the objects you want inverted.

3. Release both buttons.

   Every object within the rubber banded area that was previously selected will be deselected, and vice versa.

**or**

1. Click twice on the pointer tool to select the rubber band tool.

2. Rubber band the objects you want inverted.

   Every object within the rubber banded area that was previously selected will be deselected, and vice versa.

**or** Simply point and click with the rubber band tool selected to invert a single object.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_an_Object)<<1} To Select an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_Multiple_Objects_Rubber_Banding)<<1} To Select Multiple Objects (Rubber Banding):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_All_Objects_in_the_Screen_Designer)<<1} To Select All Objects in the Screen Designer:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_an_Object)<<1} To Deselect an Object:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Deselect_All_Selected_Objects)<<1} To Deselect All Selected Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Setting Multiple Object Properties in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

If you want to change the properties of a group of objects quickly, you may do so using multiple object properties. (For example, you may want to change the font of all of your text objects, or change the background color of a group of fields.)

## To Set Multiple Object Properties:

1. Select the group of objects whose properties you want to set.
2. Right-click on one of the objects, or select **Properties** from the **Object** menu.

   The Multiple Object Properties dialog box will open.

   Some objects on this dialog box may appear dimmed if they do not apply to any of the objects selected.
3. Select the desired properties for your objects. (Properties will only be affected for object types to which they apply.)
4. Review the appropriate single-object properties topics for more information on how these settings will affect your objects:

   Text Properties

   Field Properties

   OLE Field Properties

   Screen Designer: Text Properties

   Rollup List Properties

   Activity Field Properties

   Line Properties

   Rectangle and Circle Properties

   Picture Properties
5. Click **OK** to save the properties.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_Multiple_Objects_Rubber_Banding)<<1} To Select Multiple Objects (Rubber Banding):

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Select_All_Objects_in_the_Screen_Designer)<<1} To Select All Objects in the Screen Designer:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Sizing, Moving, and Layering Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Once you have placed your objects on the screen, you may need to size, move, and layer them so that they are in the correct position.


Layering Objects
Moving Objects
Copying and Pasting Objects
Gridlines and Position Indicator
Centering Objects
Sizing Objects

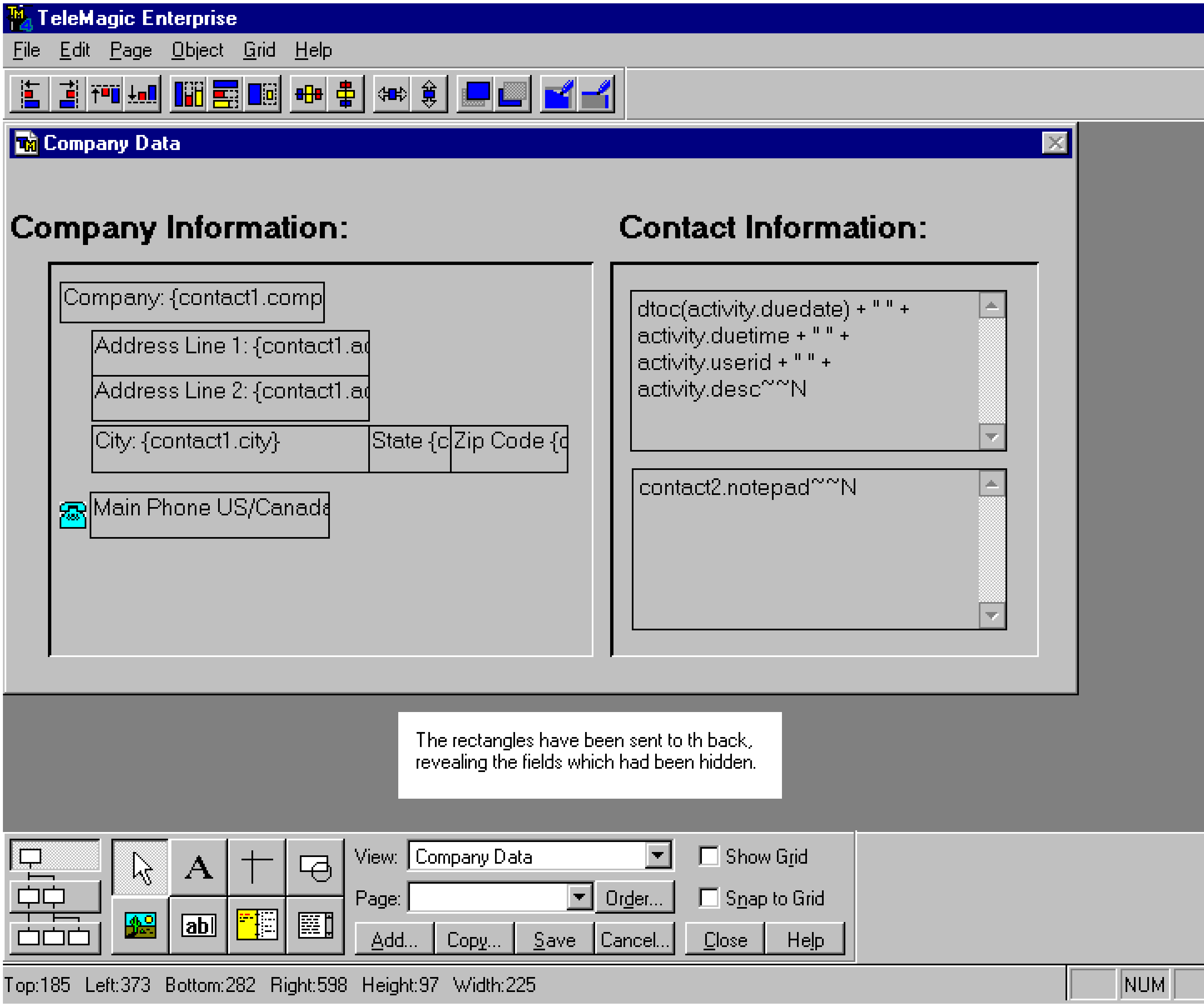

## Continue…


{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## Screen Designer: Layering Objects

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ï¿½ï¿½ )<<1}

Layering objects means placing objects in front of, or behind other objects. For example, if you have drawn a box around a group of fields to separate them from other objects on the screen, you will need to place the box behind the group of fields.




**Sample Screen with Objects in front of Fields**

[To Send an Object to the Back](#)
[To Bring an Object to the Front](#)

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Send an Object to the Back in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Select the object you want to send to the back.
2. From the **Object** menu, select **Send to Back**.

**or** On the keyboard, press CTRL+J.

The object will be sent to the back.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Bring_an_Object_to_the_Front)<<1} To Bring an Object to the Front

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# To Bring an Object to the Front in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Select the object you want to bring to the front.
2. From the **Object** menu, select **Bring to Front**.

**or** On the keyboard, press CTRL+G.

The object will be brought to the front.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Send_an_Object_to_the_Back)<<1} To Send an Object to the Back
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# Gridlines and Position Indicator in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

When moving and sizing objects, it is often helpful to know how objects are aligning with other objects. Very often, simply looking at an object will not give you an accurate indication of alignment. TeleMagic provides tools to help you do this.

Gridlines
Position Indicator

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Screen Designer Gridlines

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Screen_Designer_Gridlines_Hint)<<1}

You can have TeleMagic draw a grid on your page that will give you a visual indication of the alignment of objects. You also have the option of causing objects to "snap" to the nearest grid line (automatically align along the grid line). This will help you to keep size and alignment uniform.

To Show the Grid:
To Turn Off the Grid:
To Snap Objects to the Grid:
To Turn Off Snap to Grid:
To Change the Grid Size:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Position_Indicator)<<1} Position Indicator
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## To Show the Grid in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_To_Show_the_Grid_in_the_Screen_Designer_Hint)<<1}

- On the control bar, mark the **Show Grid** check box.

**or** From the **Grid** menu, select **Show Grid**. A check mark will appear beside the menu option.

The grid will appear on your page.

The intersection points of the grid lines will appear. Objects drawn on the page will be placed in front of the grid. You can use the lines to see where any object is in relation to others.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_the_Grid)<<1} To Turn Off the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Change_the_Grid_Size)<<1} To Change the Grid Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Snap_Objects_to_the_Grid)<<1} To Snap Objects to the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_Snap_to_Grid)<<1} To Turn Off Snap to Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Position_Indicator)<<1} Position Indicator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# To Turn Off the Grid in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- On the control bar, unmark the **Show Grid** check box.

**or** From the **Grid** menu, select **Show Grid**. The check mark will disappear from beside the menu option.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Show_the_Grid)<<1} To Show the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Snap_Objects_to_the_Grid)<<1} To Snap Objects to the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_Snap_to_Grid)<<1} To Turn Off Snap to Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Change_the_Grid_Size)<<1} To Change the Grid Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Position_Indicator)<<1} Position Indicator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# To Snap Objects to the Grid in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_To_Snap_Objects_to_the_Grid_in_the_Screen_Designer_Note)<<1}

- On the control bar, mark the **Snap to Grid** check box.

**or** From the **Grid** menu, select **Snap to Grid**. A check mark will appear beside the menu option.

All new objects that you draw will be aligned to the grid. Existing objects will not be moved to align to the grid unless you select them.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Show_the_Grid)<<1} To Show the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_the_Grid)<<1} To Turn Off the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_Snap_to_Grid)<<1} To Turn Off Snap to Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Change_the_Grid_Size)<<1} To Change the Grid Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Position_Indicator)<<1} Position Indicator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# To Turn Off Snap to Grid in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- On the control bar, unmark the **Snap to Grid** check box.

**or** From the **Grid** menu, select **Snap to Grid**. The check mark will disappear from beside the menu option.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Snap_Objects_to_the_Grid)<<1} To Snap Objects to the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Show_the_Grid)<<1} To Show the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_the_Grid)<<1} To Turn Off the Grid:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Change_the_Grid_Size)<<1} To Change the Grid Size:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Position_Indicator)<<1} Position Indicator

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# To Change the Grid Size in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Grid** menu, select **Grid Size**.

   The Grid Size dialog box will open.

2. If you want your grid to be the height and width of one character in your default font, mark the `Use Font Dimensions` check box.

**or** If you want to specify a custom grid size, unmark `Use Font Dimensions` and set the height and width in pixels in the `Vertical Pixels` and `Horizontal Pixels` fields.

3. Click **OK** to save the grid settings.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Show_the_Grid)<<1} To Show the Grid:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_the_Grid)<<1} To Turn Off the Grid:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Snap_Objects_to_the_Grid)<<1} To Snap Objects to the Grid:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Turn_Off_Snap_to_Grid)<<1} To Turn Off Snap to Grid:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Position_Indicator)<<1} Position Indicator
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# Screen Designer: Position Indicator

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The status bar in the Screen Designer provides a position indicator that will tell you the coordinates of your selected objects. When an object is highlighted, the status bar will give you detailed information concerning its position:


The `Top`, `Left`, `Bottom`, and `Right` show the object's coordinates on your grid. `Top` and `Botton` are row numbers; `Left` and `Right` are column numbers. The `Height` and `Width` of the object are measured in pixels.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Gridlines)<<1} Gridlines

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

# Moving Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Moving_Objects_in_the_Screen_Designer_Hint)<<1}

You can move objects singly or in groups to position them on the page or in relation to other objects.

To Move a Single Object:
To Move Multiple Objects:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## To Move a Single Object in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_To_Move_a_Single_Object_in_the_Screen _Designer_Note)<<1}

- With the pointer tool selected, click on the object and drag it to its new position.

**or** With either the pointer or rubber band tool, select the object and use the ARROW keys to move it one pixel at a time or, if you have Snap to Grid set to On, one grid line at a time.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Move_Multiple_Objects)<<1} To Move Multiple Objects:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Objects

# To Move Multiple Objects in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. Select the objects following the guidelines under To Select Multiple Objects (Rubber Banding).

2. With the pointer tool, point to one of the selected objects and drag or use the ARROW keys. (You must be pointing directly on a selected item. If you click on a non-selected item or on the page, it will deselect the objects.)

   The objects will remain in their original positions as you drag. An outline of the area in which the objects are contained will indicate where the objects will be placed when you release the mouse.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Move_a_Single_Object)<<1} To Move a Single Object:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Objects

# Copying and Pasting Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The Screen Designer's copy and paste feature allows you to place screen objects in a clipboard and paste them onto the same page, or to another page, or even to another database.

## To Copy and Paste Objects:

1. Select the object(s) you want to copy.
2. If you want to copy the object to a clipboard while retaining the original in its current position, press CTRL+C on the keyboard or select **Copy** from the **Edit** menu.

**or** If you want to move the object to a clipboard without retaining the original, press CTRL+X on the keyboard, or select **Cut** from the **Edit** menu.

3. Open the page where you want to place the copied object(s) and press CTRL+V or select **Paste** from the **Edit** menu.

   The Screen Designer will observe the following rules when copying and pasting objects:

   - Windows also provides a clipboard for copying and pasting objects. Although the Screen Designer uses the same keyboard commands for copying and pasting, it does not use the same clipboard. If you have other Windows objects in a clipboard, copying a Screen Designer object will not overwrite them, and vice versa. If you are editing text in the Screen Designer (as opposed to a screen object), selecting to copy or paste will use the Windows clipboard.
   - Objects copied to the clipboard will be available during the current session of TeleMagic. You may close the Screen Designer and open another database without losing your objects. If you close TeleMagic, however, your objects will no longer be available.
   - If multiple objects were selected, they will be pasted as a group, maintaining their relative positions to each other.
   - When pasting objects, the Screen Designer will try to paste them to the same place on the page from which they were copied. If you are pasting to a page that is too small to accommodate the objects in their original position, the objects will be moved toward the upper-left of the page until they fit. If the objects will not fit onto the screen, you will be given a warning message and no objects will be pasted.
   - Objects that are not field-related (e.g.,

rectangles, text, pictures, etc.) will always be pasted, provided they fit on the page.

- Field-related objects may be pasted to pages from the same database and level from which they were copied, as well as to pages from lower database levels. You may not paste field-related objects to a higher level. (i.e., You cannot place a Level 2 field on a Level 1 page.)
- When pasting fields to different databases, the related field must exist in the target database and be of the same type as the one in the source database. If the template of the field is different between databases, the field being pasted will inherit the template of the field in the database into which it is pasted.
- When pasting a rollup list to a different database, the list can only be pasted to the same level from which it was copied. The list expression -- as well as any filter, index, or security expressions associated with the list -- must be valid in the database into which it is being pasted.
- If any objects could not be pasted, the Screen Designer will display a warning message informing the user of how many objects could not be pasted.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½CALEND3_Sizing_Moving_and_Layering_Objects)<<1}

# Centering Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

You have the ability to center objects vertically, horizontally, or both. If you have multiple objects selected, you also have the option of centering the objects individually or as a group.

## To Center Objects:

1. Select the object(s) you want to center.

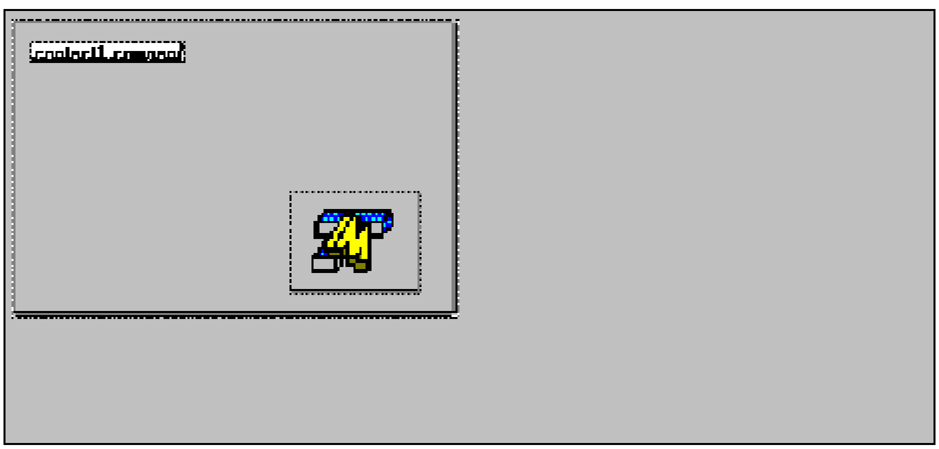
2. From the **Object** menu, select **Center**.

   The Centering Objects dialog box will open.

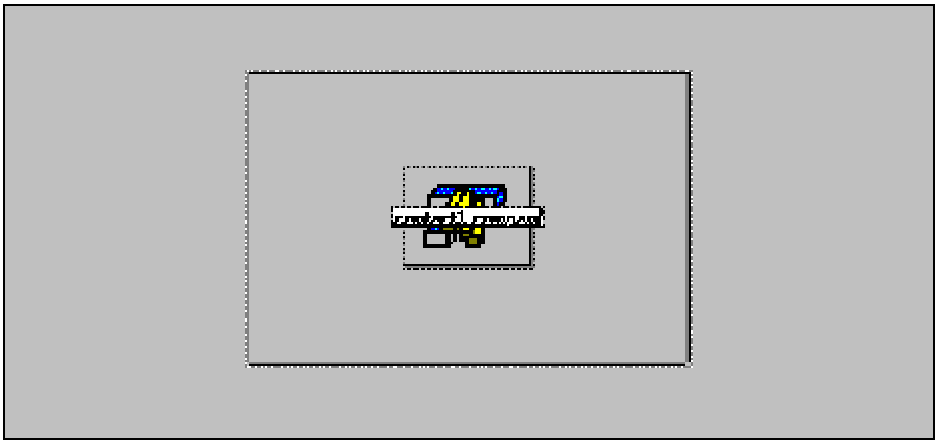
   If you have selected a group of objects, you will have the option to center them individually or as a group. If you have a single object selected, skip to step 4.

3. If you have multiple objects selected, choose `Individually` if you do not want to retain the objects' spatial relationship to each other. Each object will be centered independently of the other objects in the group. (The objects will end up stacked on top of each other.)

   **Example:** If you individually center the selected items in the illustration below:

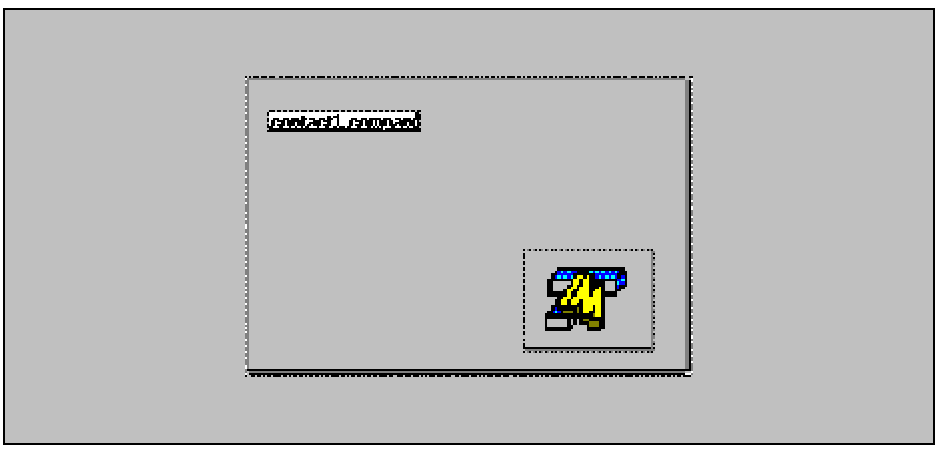


The result will be similar to this:



- **or** Select `As a group` if you want the objects to retain their positions relative to each other, while the entire group is centered.

  **Example:** If the objects in the above illustration were centered as a group, the result would be similar to this:



4. If you want the selected object(s) centered vertically between the top and bottom edges of the page, select `Vertically`.

- 5. If you want the selected object(s) centered horizontally between the left and right edges of the page, select `Horizontally`.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Aligning_and_Sizing_Objects)<<1} Aligning and Sizing Objects

# Sizing Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

When an object is first placed on the page, you can define the general size you want it to be. Should you need to adjust the size after the object is placed, you can simply drag it to new dimensions.

### To Size an Object:

1. Select the object.

   A dotted line will appear around the object.

   The bottom and right edges of the object will be outlined in a darker shading.

2. Click on the shaded area.

   Your mouse will change to a two headed arrow: ↔ (horizontal positioning); ↕ (vertical positioning); or ⤡ (simultaneous horizontal and vertical positioning, accessed from the lower left-hand corner).

3. Drag the item to the desired size.

**or** Hold down the CTRL key and press an ARROW key to size the object one pixel at a time.

**WARNING!**

If you size an object using CTRL and an ARROW key, make sure you do not move the sizing border past the opposite edge of the item. If you do so, the object will be considered *drawn with error* and will be removed from the database screen.

## Continue…


{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Sizing_Moving_and_Layering_Objects)<<1} Sizing, Moving, and Layering Screen Designer Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Deleting Objects in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

## To Delete an Object:

1. Select the object you want to delete.
2. On the keyboard, press the DELETE key.

**WARNING!**
Do not click **Delete** on the control bar. This will delete the entire page.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Edit Input Order in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Edit_Input_Order_in_the_Screen_Designer_Note)<<1}

TeleMagic lets you control the order in which you add data to fields on a contact page. When you are inputting data on a screen, you use the TAB key to move from field to field. By using the **Set Input Order** menu option in the Screen Designer you can decide in advance in what field order you want your cursor to jump when you press TAB.

You can set the input order manually, or you can have TeleMagic set the order based on the rows and columns in which the fields are arranged. When manually setting the input order, you designate the TAB sequence of each item relative to every other item on your contact page. When allowing TeleMagic to set the order, TeleMagic will read the page, note the position of items column- and row-wise on the page, and set the input order from top to bottom and left to right.

To View the Input Order:
To Set the Input Order Manually:
To Set the Input Order Using the Quick Order Option:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

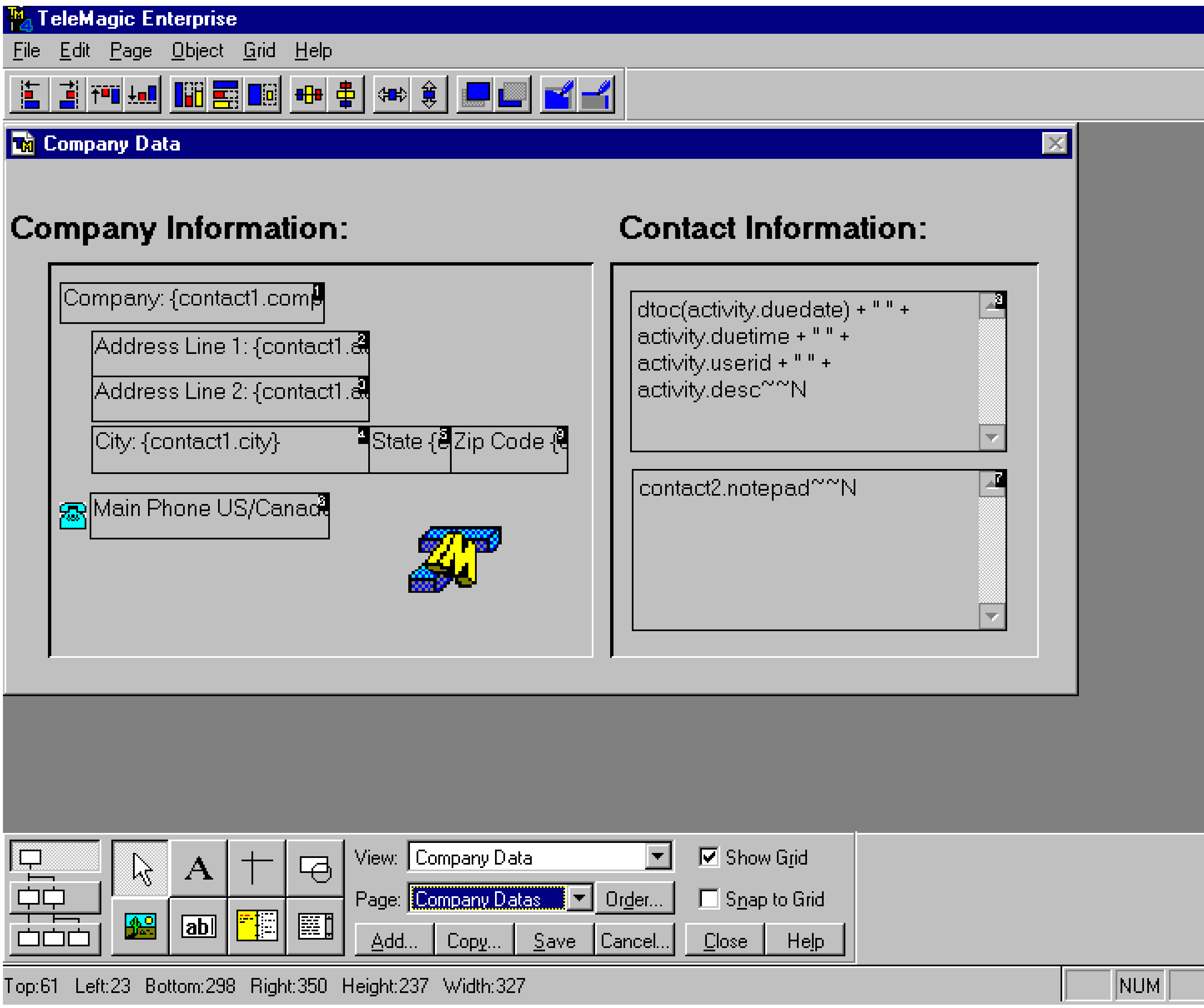
## To View the Input Order in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_To_View_the_Edit_Order_in_the_Screen_Designer_Hint)<<1}

Before you set the input order, it may be helpful to view the current order for your fields.

- From the **Page** menu, select **Show Input Order.**

  A numbered square will appear in each field indicating its place in the input order:




The initial TAB order is based on the order in which fields are added. The numbering displayed in the above example illustrates the TAB order that would be used for this sample screen. Unless you intentionally added fields in the order you will be using them, chances are the input order will need to be adjusted, as is demonstrated in the above example.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Set_the_Edit_Order_Manually)<<1} To Set the Input Order Manually:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Set_the_Edit_Order_Using_the_Quick_Order_Option)<<1} To Set the Input Order Using the Quick Order Option:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Set the Input Order Manually in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

1. From the **Page** menu, select **Set Input Order**.

   The Input Order dialog box will appear.

   TeleMagic lists all the fields on the page in the input order box. The order in which they are listed is the current TAB sequence. The item at the top of the list is the first field your cursor will appear in; the second item is where your cursor will next appear when you press TAB, and so on down the list.

2. Select an item.

   A positioning arrow will appear on the corresponding list order button, and the selected item will become highlighted.

3. Drag the item to its new position in the list order.

4. Repeat as necessary, then click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_View_the_Edit_Order)<<1} To View the Input Order:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Set_the_Edit_Order_Using_the_Quick_Order_Option)<<1} To Set the Input Order Using the Quick Order Option:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## Setting the Input Order Using the Quick Order Option in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

### To Set the Input Order:

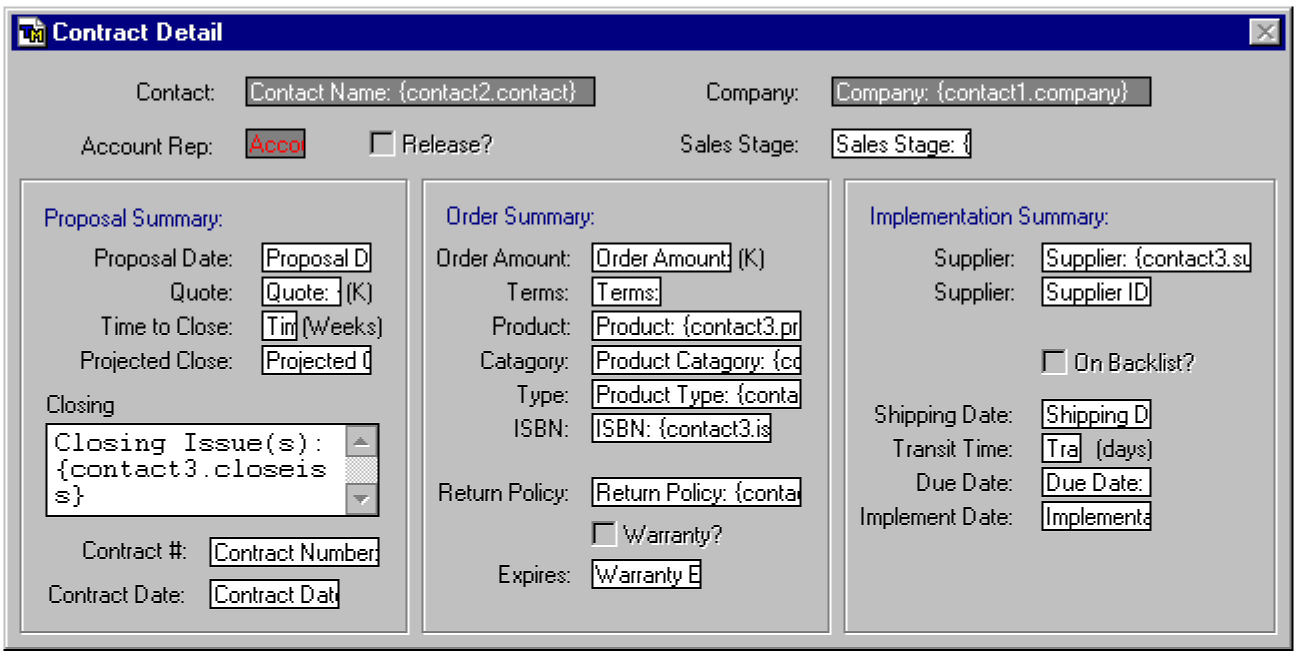
1. From the **Page** menu, select **Set Input Order**.

   The Input Order dialog box will appear.

2. Click the **Row** button.

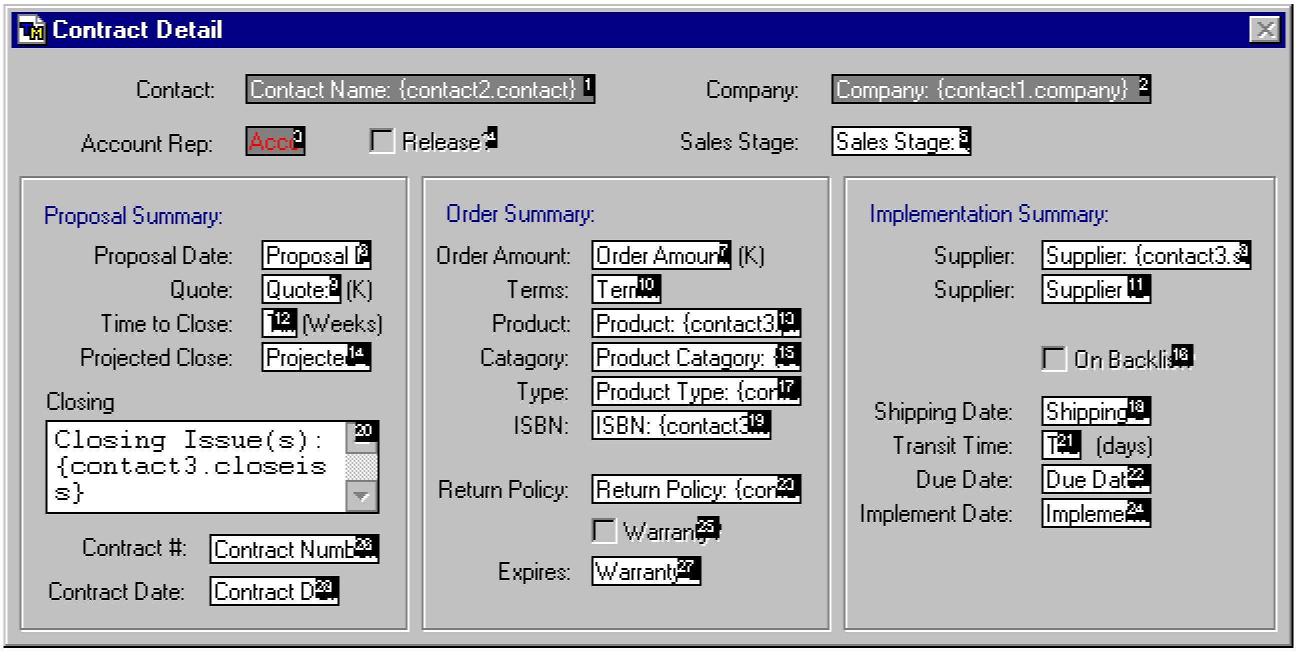
   Objects and fields will be edited in order, as they are positioned first across and then down the page.

   **Example:** For the sample page below:




**Sample Page**

By Row input order would be:

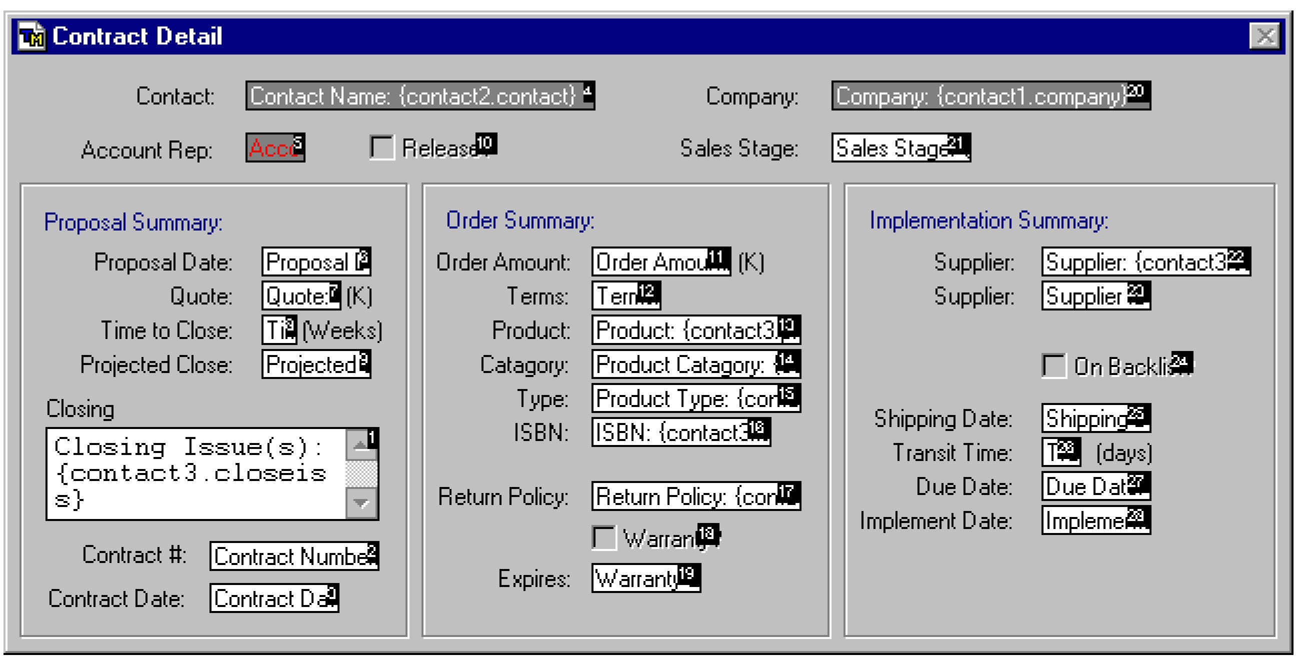


**By Row Input Order**

**or** Click the **Column** button.

Objects will be edited in the order they are positioned first down, then across the page.

**Example:** For the sample page above, Column input order would be:



**By Column Input Order**

Notice that the Closing memo field is the first in this input order. This is because the left side of this field is farther left than the left side of any other field.

3. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_View_the_Edit_Order)<<1} To View the Input Order:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Set_the_Edit_Order_Manually)<<1} To Set the Input Order Manually:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Backing up Your Work in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The **Backup** feature on the **File** menu will allow you to create a backup copy of your current screen design. This is useful if you will be making changes that you are not sure you will want to keep. You can make a backup, make the changes, then return the database to the state it was in prior to the backup if you are not satisfied with your changes.

## To Back up Your Database Views:

1. From the **File** menu, select **Backup**.

   You will be warned that this action will overwrite any previous backup and asked to confirm your decision.

2. Click **Yes** to continue.

**or** Click **No** to abort.

   There will be a pause as TeleMagic copies the field structures and screen designs. When it is complete a `Backup Complete` message will appear.

3. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Restore_from_Backup)<<1} To Restore from Backup:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# To Restore from Screen Designer Backup:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

**WARNING!**
If you select to restore a backup, any changes to both views and field structure since the last backup will be lost. If you have added fields to the database since the last backup, and have been entering data into those fields, the data will be lost.

1. From the **File** menu, select **Restore**.

   You will be asked to confirm your decision to restore the backup.

2. Click **Yes** to continue.

**or** Click **No** to abort.

   If you select **Yes** there will be a pause as TeleMagic copies the field structure and screen design from the backup copy to your database. When it is complete a `Restore Complete` message will appear.

3. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Saving Your Screen Designer Work

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Saving_Your_Screen_Designer_Work_Note )<<1}

It is important that you save frequently the changes you have made to your screen design.

## To Save Changes to a Page:

- Click **Save** on the control bar. (**Save** replaces the **Edit** button when you are in edit mode.)

**or**

1. Navigate to another page, view, or level.

   You will be asked if you want to save your changes.

2. Select **Yes**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Cancel_Changes)<<1} To Cancel Changes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Restore_from_Backup)<<1} To Restore from Backup:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Working_with_Pages_in_a_View)<<1} Working with the Pages in a View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## To Cancel Changes in the Screen Designer:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

- Click **Cancel** on the control bar. (**Cancel** replaces the **Delete** button when you are in edit mode.)

  **or**

  1. Navigate to another page, view, or level.

     You will be asked if you want to save your changes.

  2. Select **No**.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Saving_Your_Work)<<1} Saving Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_To_Restore_from_Backup)<<1} To Restore from Backup:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Working_with_Pages_in_a_View)<<1} Working with the Pages in a View

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

## Working with the Pages in a Screen View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

Arranging Pages in Your View
Removing Pages and Views from Your Database

# Arranging Pages in Your Screen View

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The way you arrange pages in the Screen Designer will control the order in which pages are presented when you page up and down through them in the Contact Manager. The arrangement of pages can be very important during data entry. Forethought now will save unnecessary jumping around when information is being entered in a record.

## To Arrange the Pages in Your View:

1. From the control bar, select **Arrange**.

   The Page Order dialog box will open, displaying the pages in the current view.

2. Click on the button to the left of the page name and drag the page to its new position.

3. Click **OK** to save the page order.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Removing_Pages_and_Views_from_Your_Database)<<1} Removing Pages and Views from Your Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Removing Pages and Views from Your Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

You may find that you have added a page or view in error, or that an existing page or view is no longer needed. You can easily remove any existing pages or views from your database.

### To Delete a Page or View:

1. Navigate to the page you want to delete.
2. Click **Delete** on the control bar.

   The Delete View or Page dialog box will appear.
3. If you want to delete all pages in the current view simultaneously, select **Delete View**.

**or** If you want to delete only the current page, select **Delete Page**.

You will be asked to confirm your decision to delete.

4. Click **Yes** to delete the page or view.

**or** Click **No** to abort.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Arranging_Pages_in_Your_View)<<1} Arranging Pages in Your View
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Completing_Layout)<<1} Completing Layout
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Backing_up_Your_Work)<<1} Backing up Your Work
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCREENS_Exiting_the_Screen_Designer)<<1} Exiting the Screen Designer

# Exiting the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

## To Exit the Screen Designer:

1. Click **Save** on the control bar to save any changes to the current page.
2. From the **File** menu, select **Close**.

**or** Click the **Close** button on the control bar.

The Screen Designer will close.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp| contdn01.BMP<JumpId(TM.HLPï¿½SCREENS_Screen_Designer)<<1}

# Large Font Issues in the Screen Designer

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCREENSX_Large_Font_Issues_in_the_Screen_Designer_Hints)<<1}

When designing your contact screens, it is important to know if the page will be opened on workstations configured to use small fonts exclusively, large fonts exclusively, or if they may be opened using either font setting. If users opening the page will be using large or small fonts exclusively, you can simply design your views with the desired setting active. If the database will need to be opened using both font settings, you should design the page in small fonts, then check it in large fonts.

If you are designing for both font settings, you should be aware of some basic guidelines related to the way that Windows converts fonts. Windows applies large fonts by changing the point size when displaying text. However, not all fonts are converted. If Windows determines that a font already appears large enough, it may be left alone. If a font is changed, the actual proportion of change will also vary. This is based on both the current point size of the font, and the font itself. (Two fonts of the same point size can appear very different. For example, **font 1** and **font 2** are both 10 point bold.) Because of inconsistencies in sizing when using small and large font views, it is highly recommended that you set the page font properties and use that same font, point size, and style (bold, italic, or regular) for all text items. You will find that you get the best results from using an 8 point font. (TeleMagic automatically adjusts the page size when you are in large font view to accommodate any text objects that are resized. If you use a larger text font, it may or may not be resized. If the text items are not resized, the page will appear too large for the objects on the page. 8-point fonts are always resized.)

If you do mix fonts, you will probably have inconsistencies in the layout that you will need to address when you go to large fonts. The main caution when mixing font styles is to make sure that you will not have text objects that are positioned off the screen. Your page will be resized in large font view to accommodate the change in the text object sizes. The new size will be proportional to the page's font setting. If you have a text object that uses a different font setting, it may resize proportionally larger than the page. In this case, it could go off the screen, which will generate an error. If you do want to vary your text and this occurs, you will need to adjust the object in small font view.

There are additional issues if you have rollup lists on your page. In order to keep rollup lists aligned in columns, you should use a non-proportional font in the list. If your text headings on the page use a proportional font, the headings will not be aligned to the column in large font. To compensate partially for this, you should make all of the column headings one text object (instead of creating individual text objects for each column heading), with the headings for each column separated by spaces. In this way, the headings will be proportioned as a group with the rollup list text. The only problem remaining is that the two different fonts will probably not be resized at the same proportion and the heading will not be exactly aligned with the list column. One way to compensate for this is to use the same non-proportional font for the heading as is used in the list item. Alternatively, TeleMagic has programmatically accounted for this in the fonts that are used for the sample databases. You can take advantage of this by using MS Sans Serif 8 point regular for your page font and the text objects, and Courier 10 point regular for your rollup list. TeleMagic will account for the proportional differences in the way the objects are sized and position them correctly.

# Aligning and Sizing Objects

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You can align objects relative to one another along their edges or their centers. You can also make objects the same size. Aligning objects differs from centering objects. Objects are centered relative to the page, while objects are aligned relative to one another. You must have more than one object selected in order to change objects relative to one another.

## To Align Objects:

1. Select the objects that you want to align or size relative to one another by rubber banding them.

2. Click one of the alignment tools:

   Align Left Edges

   Align Right Edges

   Align Top Edges

   Align Bottom Edges

   Align Centers Horizontally

   Align Centers Vertically

**or** Select the desired alignment option from the **Object** menu.

• The selected objects will be aligned relative to one another.

## To Size Objects Relative to One Another:

1. Select the objects that you want to align or size relative to one another by rubber banding them.

2. Select one of the sizing tools:

   Same Height

   Same Width

   Same Size

**or** Select the desired sizing option from the **Object** menu.

The selected objects will be made the same dimensions as the first object selected.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Centering_Objects)<<1} Centering Objects in the Screen Designer

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½SCREENS_Layering_Objects)<<1} Screen Designer: Layering

Objects

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(tm.hlpï¿½SCREENS_To_Select_an_Object)<<1} To Select an Object in the Screen Designer:

# Rollup List Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Screen Designerï¿½ ï¿½ ï¿½ )<<1}

The following fields are available for use in Rollup List expressions. Values in parenthases are the value that indicates the associated status. Other values may be available in some cases, but are not used at this time.

## Activity

| | |
|---|---|
| Activity.Acttype | The type of activity, either Activity (1) or To-Do (2). |
| Activity.Alarmmin | Number of minutes before alarm. |
| Activity.Alarmtype | No alarm (0), audible alarm (1), visual alarm (2), or both (3). |
| Activity.Assignstat | Status of assignment. Pending (0), Accepted (2), or Rejected (3) |
| Activity.Commentid | Unique ID for the comment. |
| Activity.Compdate | Completion date. |
| Activity.Comptime | Completion time. |
| Activity.Contactid | The ID of the contact this activity is linked to, if any. |
| Activity.Contactinf | Unique ID of an activity. |
| Activity.Dbid | The ID of the database the activity is linked to, if any. |
| Activity.Desc | User's description of the activity. |
| Activity.Direction | Out (0) or In (1). |
| Activity.Duedate | The activity's due date. |
| Activity.Duetime | The activity's due time. |
| Activity.Durasecs | The activity's expected duation, in seconds. |
| Activity.Duration | The activity's expected duration, in minutes. |
| Activity.Groupid | A unique ID for a recurring activity or group of activities. |
| Activity.Grouptype | Generally related (1), Master group record (M), Part of an activity group (U), Non-floating To-Do (N), Single activity (blank) |
| Activity.Hidden | Displays in activity views (1) or not (0). |
| Activity.Lastrecur | The last occurrence of a recurring activity (1) or not (0). |
| Activity.Noteflag | Activity relates to a Notebook record (1) or not (0). |
| Activity.Owner | User ID of the person who created the activty. |
| Activity.Priority | The activity's priority; Blank, 1, 2, or 3. |
| Activity.Sequence | |
| Activity.Status | User-defined status. |
| Activity.Tdfloat | |
| Activity.Tdorder | To-Do order. |
| Activity.Type | User-defined type. |
| Activity.Userid | User to whom the activity is assigned. Blank if it applies to all users. |

## Document

| | |
|---|---|
| Wpdesc.Contactid | ID of the linked contact, if any. |
| Wpdesc.Datemade | Date the document was generated. |
| Wpdesc.Dateprint | Date the document was printed. |
| Wpdesc.Dbid | Unique ID of the database the document is linked to, if any. |
| Wpdesc.Desc | User-defined description. |
| Wpdesc.Docid | The document's unique ID. |
| Wpdesc.Filename | Name and path of the word processing file. |
| Wpdesc.Template | Whether the document is a template (1) or not (0). |
| Wpdesc.Userid | User ID of the document's author. |
| Wpdesc.Wpid | Indicates the word processor used to create the document. |

## E-mail

| | |
|---|---|
| Dbmail.Contactid | The ID of the contact this message is linked to, if any. |
| Dbmail.Daterecv | The date the message was received. |
| Dbmail.From | The originator of the message. |
| Dbmail.Mailid | A unique identifier for the message. |
| Dbmail.Message | The text of the message. |
| Dbmail.Owner | The user ID of the sender. |
| Dbmail.Subject | User-defined subject. |
| Dbmail.To | Recipient of the message. |
| Dbmail.Userid | User ID of the recipient |

## Sales

| | |
|---|---|
| Tmsales.Actcost | Actual cost of goods sold. |
| Tmsales.Actpo | Purchase order for closed sale. |
| Tmsales.Actualamt | Actual sale amount. |
| Tmsales.Actualsold | Date of actual sale. |
| Tmsales.Comment1 | Comments for phase 1 |
| Tmsales.Comment2 | Comments for phase 2 |
| Tmsales.Comment3 | Comments for phase 3 |
| Tmsales.Comment4 | Comments for phase 4 |
| Tmsales.Comment5 | Comments for phase 5 |
| Tmsales.Comment6 | Comments for phase 6 |
| Tmsales.Comment7 | Comments for phase 7 |
| Tmsales.Contactid | The ID of the contact this forecast is linked to, if any. |
| Tmsales.Date1 | Date for phase 1 |
| Tmsales.Date2 | Date for phase 2 |
| Tmsales.Date3 | Date for phase 3 |
| Tmsales.Date4 | Date for phase 4 |
| Tmsales.Date5 | Date for phase 5 |
| Tmsales.Date6 | Date for phase 6 |
| Tmsales.Date7 | Date for phase 7 |
| Tmsales.Dbid | The ID of the linked database, if any. |
| Tmsales.Desc | User-defined description of the forecast. |

| | |
|---|---|
| Tmsales.Fcamt | Amount budgeted for this forecast. |
| Tmsales.Fcpercent | Probability of closure. |
| Tmsales.Fcsell | Date of projected sale. |
| Tmsales.Flag1 | Flag for phase 1. |
| Tmsales.Flag2 | Flag for phase 2. |
| Tmsales.Flag3 | Flag for phase 3. |
| Tmsales.Flag4 | Flag for phase 4. |
| Tmsales.Flag5 | Flag for phase 5. |
| Tmsales.Flag6 | Flag for phase 6. |
| Tmsales.Flag7 | Flag for phase 7. |
| Tmsales.Notepad | The notepad for this forecast. |
| Tmsales.Phase1 | The name of phase 1. |
| Tmsales.Phase2 | The name of phase 2. |
| Tmsales.Phase3 | The name of phase 3. |
| Tmsales.Phase4 | The name of phase 4. |
| Tmsales.Phase5 | The name of phase 5. |
| Tmsales.Phase6 | The name of phase 6. |
| Tmsales.Phase7 | The name of phase 7. |
| Tmsales.Product | The name of the product to be sold. |
| Tmsales.Quantity | The quantity of the product to be sold. |
| Tmsales.Quote | Amount quoted for this forecast. |
| Tmsales.Rep | User ID of the sales representative. |
| Tmsales.Saleid | Unique ID for this forecast. |
| Tmsales.Status | The status of the product to be sold. |
| Tmsales.Tmlastrev | The last time this forecast was revised. |
| Tmsales.Tmstart | When this forecast was first created. |
| Tmsales.Type | The type of product to be sold. |
| Tmsales.Userid | ID of the user currently logged on. |

## Note for the Screen Designer

If some users will be accessing your view in a screen resolution using large fonts, see the Large Font Issues in the Screen Designer topic for helpful guidelines.

## Note for Step 2

The Screen Designer uses both the right and left mouse buttons. Windows defaults are for right-handed people who primarily use the left mouse button. Where the instructions tell you to use the mouse, use the left mouse button. Only use the right mouse button when you are specifically instructed to do so. If you have your mouse configured to use the right mouse button primarily, use the right button where you are instructed to use the mouse, and only click the left button if the instructions specify to use the right button.

## Notes for Planning Your Contact Views

Before you begin your screen design, read What You Can Do and What You Cannot Do. These sections concisely list and explain Screen Designer capabilities and limitations. Reading them will save you time and error.

If you will be creating multiple views that share some information (for instance, if you are creating views that will all contain basic address information for multiple departments), create a view with the common information, then copy that view and modify the copies for each additional view.

## Note for Starting the Screen Designer

You must select a database before you start the Screen Designer.

## Note for Navigating in the Designer

You should make sure that you do not have lower level views without the higher level views to support them. For example, if you add a view for Level 2, you should have a view for Level 1 as well. If you do not, you will not be able to add any records to your view.

## Note for Adding Screen Views and Pages

If you simply want to change objects on an existing page, see Placing Objects on the Page..

## Note for Adding a New Screen Page

Added pages will use TeleMagic's page properties defaults. If you have customized a page and want to use those properties, select to copy the page instead of adding a new one. See To Copy a View or Page for more information.

## Note for Copying a Screen View or Page

Copying a page will copy both the page’s properties (see Setting Page Properties for details) and any objects that have been placed on the page.

## Note for Step 3

If you have selected to copy the current page to the same view, this option will be unavailable.

## Note for Step 4

This option will be unavailable if you are copying the entire view.

## Note for Step 5

This option will be unavailable if you have selected to copy the page or view to a new view.

## Note for Setting Screen Page Properties

If you do not set properties for a page, the default colors will be black on light gray. The default font will be MS Sans Serif 10 point. The default page size will fit in on a monitor with 640 by 480 resolution. The default grid will be based on the font.

## Note for Step 1

If you are working on a page with existing objects, make sure you click on the page, not on one of the objects.

## Note for Step 2

You will not be able to select a view name that is already in use. If you want to move a page to a different view, copy the page to the view then delete the original. (See To Copy a View or Page: for details.)

## Note for Step 4

In addition to controlling the appearance of any text on the screen—including the text that is typed into fields during data entry—TeleMagic measures the page by how many characters of text will fit on the screen.

## Note for Step 7

If you are setting properties for a screen with objects already on it, you will not be able to make the screen smaller than the space currently occupied by the objects.

## Note for Step 9

If you are working on a network, make sure that all users who will be accessing this database have access to the picture. If different users want to use different backgrounds, you can copy the view and change the picture on the copies.

## Note for Step 2

If you are sizing a screen with objects already on it, you will not be able to make the screen smaller than the space occupied by the objects.

## Note for Placing Objects on the Screen Page

TeleMagic's processing speed is not significantly affected by how many records, indexes, or filters you use. However, your hardware's handling of screen painting time *is* significantly affected by the number of items on the screen. The more fields, labels, different fonts, colors, pictures, lines, and boxes you use, the longer your computer will take to "draw" a new screen. Once the screen is drawn, the more OLE fields you use, the longer your computer will take to display graphical data when you flip from record to record.

## Note for Step 9

This option will only be available if you have selected `Opaque` from the `Transparency` drop-down list. (Transparent objects do not have a background.)

## Hint for Step 4

After you use a tool, TeleMagic will automatically return to the pointer tool to allow you to work with the object you have just placed on the screen. If you will be placing multiple pieces of text on the screen without using the pointer tool between each one, click twice on the text tool to lock it in place. (The text tool will appear dimmed when it is locked) Each time you click on the screen, you will receive a Text Contents dialog box until you select another tool.

## Hint for Step 1

After you use a tool, TeleMagic will automatically return to the pointer tool to allow you to work with the object you have just placed on the screen. If you will be placing multiple fields on the screen without using the pointer tool between each one, click twice on the field tool to lock it in place. (The field tool will appear dimmed when it is locked.) The field tool will continue to be used until you select another tool.

## Note for Step 2

The location of your mouse defines the upper-left corner of the field text region. If the entire field will not fit horizontally on the page, or if you place the field too close to the right edge of the page, the display will be trimmed on the right side. If you choose to include the icon with the field, it will be inserted between the prompt, if included, and the field. Space needed for the prompt will be removed from the left side of the field.

If you have not yet added fields to your database, there will be only two in this list: TMSTART and TMLASTREV. You can add fields now by clicking **Edit Field List**, and following the instructions in the Creating and Defining Fields

## Note for Step 3

If you select a field from a different level, any changes made to the field contents will be reflected on the parent record on the higher level and on all child records on the current level.

## Note for Step 4

The actual field name will not appear on your final page. TeleMagic will insert a blank box to contain the information represented by this field name.

## Note for Step 7

If you place a logical field (check box) on the screen, you can size it so that it will display as a 3-dimensional check box in Windows 95. Simply size the field vertically so that it is about three pixels taller than the default. (See the Sizing Objects in the Screen Designer topic for information on sizing fields.)

## Note for Step 5

You can also set the alignment of a field as part of the template in the Edit the Field List dialog box. If you change the alignment in the field’s properties, this change will also be made in the field’s template. (If the field is used multiple times on different pages or views, and you set a different alignment for each occurrence, the template will reflect the alignment of the first occurrence of the field.)

## Note for Step 6

If the date field is a calculated field, the icon will not be displayed.

## Note for Step 9

This option will only be available if you have selected `Opaque` from the `Transparency` drop-down list. (Transparent objects do not have a background.)

## Note for Step 1

The `Text` field will display the prompt. This information is display-only. If you want to edit the prompt text, you must do so from the Edit the Field List dialog box. (Select the field tool, then select **Edit the Field List**. Follow the guidelines in Creating and Defining Fields to edit the prompt.)

## Note for Step 8

This option will only be available if you have selected `Opaque` from the `Transparency` drop-down list. (Transparent objects do not have a background.)

## Hint for Step 5

Use the text tool to enter a description of the field. This will allow users to identify quickly the activity being displayed.

## Note for Step 7

Rollup fields will not wrap. In other words, if there is more text than will appear on one line, the information will not appear on the next line; it will simply not be displayed. If the Xs extend beyond the display, information will be cut off when the field is in use. Size the rollup as necessary to display all of the needed information.

## Notes for Step 3

If you have activities that were created as a result of phone calls, consider adding the duration fields to the expression. Activity.Duration will include the duration in minutes from both phone calls and activities. Activity.Durasecs will additionally include the seconds from phone calls.

Rollup fields will not wrap. In other words, if there is more text than will appear on one line, the information will not appear on the next line; it will simply not be displayed. If the Xs extend beyond the display, information will be cut off when the field is in use. Size the rollup as necessary to display all of the needed information.

## Hint for Step 3

If you want the rollup to display whether the document is stored in the user, database, or global list, use the wploc( ) function.

## Note for Step 4

See Expression Builder for help with building expressions. See Creating Filters for more on filtering.

## Note for Step 7

If you need to edit any of the expressions after they are initially created, use the appropriate **Expression** button to access the Expression Builder.

## Hint for Step 7

You do not necessarily need to use the fields that are being displayed on the rollup in your sort expression.

## Note for Step 9

If you select a proportional font, the columns of your text will not align properly. To keep your fields in columns, select a non-proportional font, or use the default font.

## Note for Step 4

You will not be able to use 3-D effects with a rounded rectangle.

## Note for Step 6

If you are using a 3-D effect, this setting will only apply to the dark borders. The highlighted border will always appear white. (If you select white as the pen color, your 3-D effect will not be apparent.)

## Note for Step 7

If you have made the object transparent, selecting a fill color will return the mode to opaque.

## Note for the Picture Tool

Do not confuse pictures added with the picture tool with pictures placed in OLE fields. A picture added using the picture tool will appear the same on each contact record. An OLE field is just like a data field, except that it contains an OLE object (e.g., a picture) instead of text. The picture must be added to each record separately and will likely be different for each contact.

## Hint for Step 4

Use the `Preview` window to see how your alignment choices will affect the display. (Unless your picture display is the exact size of the Preview window, this will not be an exact display; rather, it will give you an example of each alignment option.)

## Note for Step 2

If you point at an existing object, the object will be selected. You must point to an area that contains no object.

## Hint for Step 3

The pointer tool is used both to select and move objects. If you click and drag with the pointer tool on a blank spot on the screen, a rubber band will be drawn. If you click and drag with the pointer on an object, that object will be moved. The rubber band tool is used only to select objects. If you click on an object and drag when this tool is in use, it will select the objects; the item on which you click will not be moved. If you need to draw a rubber band, but you find there is not a blank spot on the page to click on, use the rubber band tool.

## Note for Step 2

The rubber band tool automatically inverts any objects that are selected while it is in use. You must hold down the right mouse button to achieve the same result with the pointer tool.

## Hint for the Screen Designer Gridlines

Your Show Grid and Snap to Grid settings will be retained when you exit and offered as a default the next time you access the Screen Designer.

## Hint for Showing the Grid in the Screen Designer

If you have objects that appear on top of another object (such as fields placed on the rectangle) and you need that object to align to the gridlines, then make the background object transparent temporarily. You will then be able to see the gridlines through the object. Align the foreground objects to the grid, then make the background object opaque again.

## Note for Snap to Grid

The grid does not necessarily need to be displayed to use snap to grid.

## Note regarding Turn Off Snap to Grid

To crop or scale OLE objects and pictures properly, it is necessary to deactivate the Snap-to-Grid feature.

## Hint for Moving Objects in the Screen Designer

To move an object from one page to another, use the copy and paste feature. See the Copying and Pasting Objects topic.

## Note for Moving a Single Object in the Screen Designer

The rubber band tool is used solely for selecting objects. You will not be able to move an object if this tool is in use.

## Hint for Step 2

If you want the background color to display between the fields when you are positioning them, place the borders of the fields exactly side by side.

## Hint for Step 2

If you want to move an object one pixel at a time, use the arrow keys instead of dragging. This will allow you to fine-tune the position of your objects. (If you have Snap to Grid selected, this will move the object one grid line at a time.)

## Note for Step 2

If you do not have an object selected, these options will be unavailable.

## Note for Step 3

This option will only be available if you have an object selected.

## Hint for Step 3

If you are pasting within a page, the object will be pasted over the original object, unless you have moved the original.

## Hint for Step 3

This is useful if you want to center one object inside another. Select both objects, center them as a group, and then adjust the position of the group if necessary.

## Note for Step 5

Choosing both vertical and horizontal centering will place the object(s) in the middle of the screen.

## Hint for Step 3

If you have multiple objects that you want to be the same size, refer the position indicator as you drag the item.

## Note for Editing Input Order in the Screen Designer

If you are using object layering, be aware that changing the input order may affect how objects are layered. When you add fields and other objects to your page, TeleMagic internally numbers the objects according to the order in which they were placed on the page. The first object is number 1, the second is number 2, and so on. This numbering allows TeleMagic to keep track of which objects have been added over the top of other objects. (For example, if you add a rectangle as the first object, then draw a line through it, TeleMagic will see the rectangle as #1 and the line as #2. It will use that numbering to determine that #1 was added first and should be behind #2.) If you use the Bring to Front or Send to Back features, TeleMagic renumbers the objects to reflect their new positions. (When you send anything to back, it becomes #1; when you bring anything to front, it becomes the highest number. All other objects are renumbered accordingly.) This same numbering is used to determine input order. The field with the lowest object number is the first field in TAB order. Changing the input order will also change the objects' layered positions. (For example, you will not be able to have field X partially behind field Y and TAB to Y first. The act of placing X behind Y sets X's TAB order higher than Y's.) If you have placed fields on top of another object, such as an opaque rectangle, it is possible that changing the TAB order of the fields could send some of them behind the rectangle. Be sure to double-check your layering after setting input order to make sure all fields are still visible and in the proper position. If you need to make any adjustments, make them to non-field objects, where possible, to avoid affecting the input order.

## Hint for View the Edit Order in the Screen Designer

If you chooset to display the input order, that setting will be retained when you exit and will be offered as a default the next time you access the Screen Designer.

## Note for Step 1

All fields on the contact screen are listed in the Input Order dialog box. But sometimes a blank space at the end of the list seems to indicate that the last field on the list is being displayed. Always check for other available fields by using the scroll bar to scroll to the end of the list.

## Note for Step 4

When you move objects around on the screen, your edit order as designated in the Input Order dialog box will not be affected. If you change the layering order (Bring to Front and Send to Back), the input order will be affected.

## Note for Saving Your Screen Designer Work

Whenever you make changes to a view or contact page, you can either save or cancel those changes. However, once you have saved changes, you cannot cancel. If you do not want to keep the changes after saving, you must restore from backup. (See Backing up Your Work for details.)

## Note for Exiting the Screen Designer

If you have made drastic changes to the database or modified the list of fields (by accessing the Edit the Field List dialog box), you should rebuild the database. See: Database Rebuild

## Hints for Large Font Issues in the Screen Designer

TeleMagic uses the font MS Sans Serif 8 point regular for all of its screens.

Going back and forth between large and small font views to adjust inconsistencies that are caused by the use of different font settings for objects on the page can be very time- consuming. Where possible, you should use the same font for all items. If you normally use bold-face text or a larger font to make items stand out, consider using a different pen color for emphasis instead. Alternatively, you could also design different contact views using large and small font settings. This would allow you to use whatever font style you like without having to account for different Windows font settings. If you choose this option, make sure all users know that they should not attempt to open the view designed for small fonts when using the large fonts setting.

Some non-text items may not appear exactly the same in large and small fonts. For example, the 3-D effect on boxes may appear slightly “off” in large fonts.

## Note for Step 3

Select from the following types of rollup lists:

**Contact**
Contact rollup lists will show the contents of fields in your contact records.
**Activity**
Activity lists show linked activities.
**Document**
Document lists will display linked documents, such as letters and faxes.
**E-mail**
E-mail lists display linked e-mail messages.
**Sales**
Sales lists display linked Sales Forecasting information.

## Note for Step 2

You cannot close the Screen Designer using the ESC key.

## Note for Step 2

If two or more objects are already aligned on one axis and you align them on the other axis, they will be on top of each other. This can be useful if you are layering objects, but if you are aligning fields of similar size it can be confusing.

## What are Scripts?

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

A script is a pre-written set of statements, answers, questions, or prompts that can be used by anyone who comes into contact with customers over the telephone. Scripts as simple as a one line greeting given by a receptionist; or they can be complex, such as one that would be required by the customer information service of a national bank. They can be designed for making outgoing calls, or for incoming calls, or both.

In addition, scripts can be used for other purposes that do not include phone use. For example, they could be a repository for specific instructions and information regarding the way your company uses a TeleMagic database.

The basic model for a script is that of a tree which has one trunk, but many branches. Following any branch will bring you to more branches; choosing one of these will lead you to yet more branches, and so on. In TeleMagic, you can have an unlimited number of branches.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

## Script Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCRIPTX_Script_Setup_Note)<<1}

There are four stages involved in adding a new script:

Planning the script;

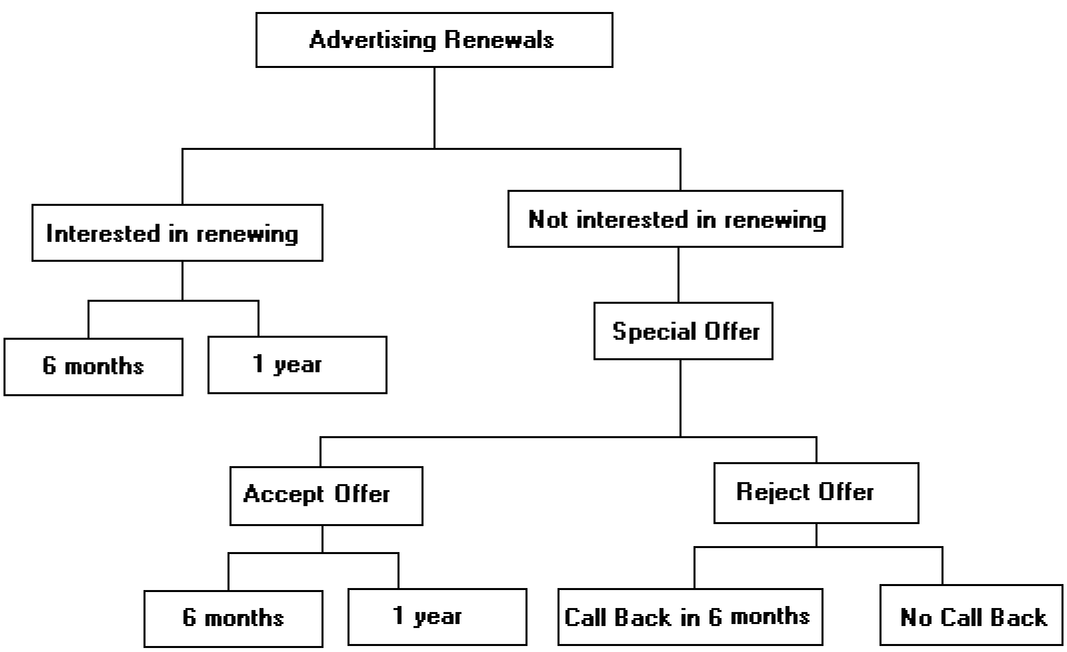
Setting up the master script name;

Creating the primary branch of the script;

Creating child branches for the script.

The script should be well planned. You should try to think of all possible directions the script user might need to turn to at any given stage. Additionally, you need to decide if responses to questions or statements in the script need to be entered into the contact record; and, if so, which database fields should be used. Every script evolves with use, but a well-planned script will need fewer alterations over time.

Before proceeding, sketch out a plan for the logical flow of the script's branches. In most cases this can be done effectively on paper. For particularly complex scripts, you may want to consider charting software.   Your plan might look something like this:




**Sample Script Flow Plan**

This example shows the flow of a script that could be used by the advertising team for a newspaper. The newspaper has a list of clients whose advertising contracts have expired. An advertising representative (ad rep) has been chosen to call each contact and try to get them to renew their contracts.

Following the script's flow, the ad rep will call each client. The client will be asked if he or she plans to renew his or her contract. If the client is "Interested in renewing", the script will then direct the ad rep to ask if the client would prefer the renewal duration of 6 months or 1 year.

If the client responds that he or she is "Not interested in renewing," the ad rep will be directed to make a "Special Offer". If the client accepts the offer, the ad rep will ask if the client would prefer the renewal duration of 6 months or 1 year. If the client responds negatively to the "Special Offer", the ad rep will ask for permission to call back in 6 months to determine if the client's advertising needs have changed. If the client agrees, the call is scheduled on the Activity calendar; if not, the call information is noted in the client's database record.

Taking the script a step further, you will need to decide how to integrate it with the rest of TeleMagic. Using the above example, you may have a field in your contact database to contain the client's current subscription information. In this case, you should indicate on your script plan each branch of the script that needs to be linked to this field to allow the ad rep to input the client's response. You may additionally have standard letters designed using the word processor for any of the possible responses. In this case, you may want to have a line in the script giving the ad rep instructions on which letter to print for the current response.

Think carefully about how you can take advantage of TeleMagic's many features to make your script more powerful.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_To_Set_Up_a_New_Script)<<1} To Set Up a New Script:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

## To Set Up a New Script:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Office** menu, select **Branch Scripting**.

   **or** Click the Branch Scripting icon on the toolbar.

   The Branch Scripts dialog box will open.

2. Click **Setup**.

   The Branch Scripts Setup dialog box will open, displaying the details of the topmost script, including the number of times each branch has been accessed (located in parenthesis next to the script title).

3. Click **Add Script**.

   The Add Script dialog box will open.

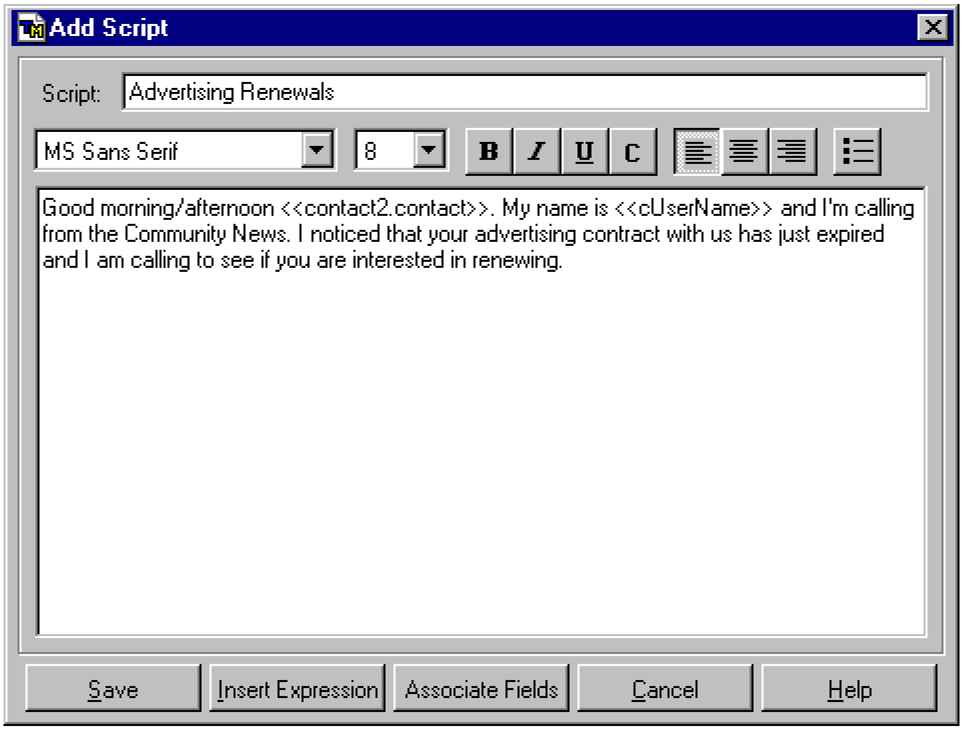
4. In the `Script:` field, enter a descriptive name for the script.

   **Example:** Advertising Renewals

5. In the text area, enter the script's text that the user will read when at this branch. Use the font controls, above the text area, to specify the appearance of the script.

6. To include information specific to the contact in the script, such as the contact's name or the last time he or she was contacted, place your cursor at the appropriate location in the script and click **Insert Expression** to open the Expression Builder.

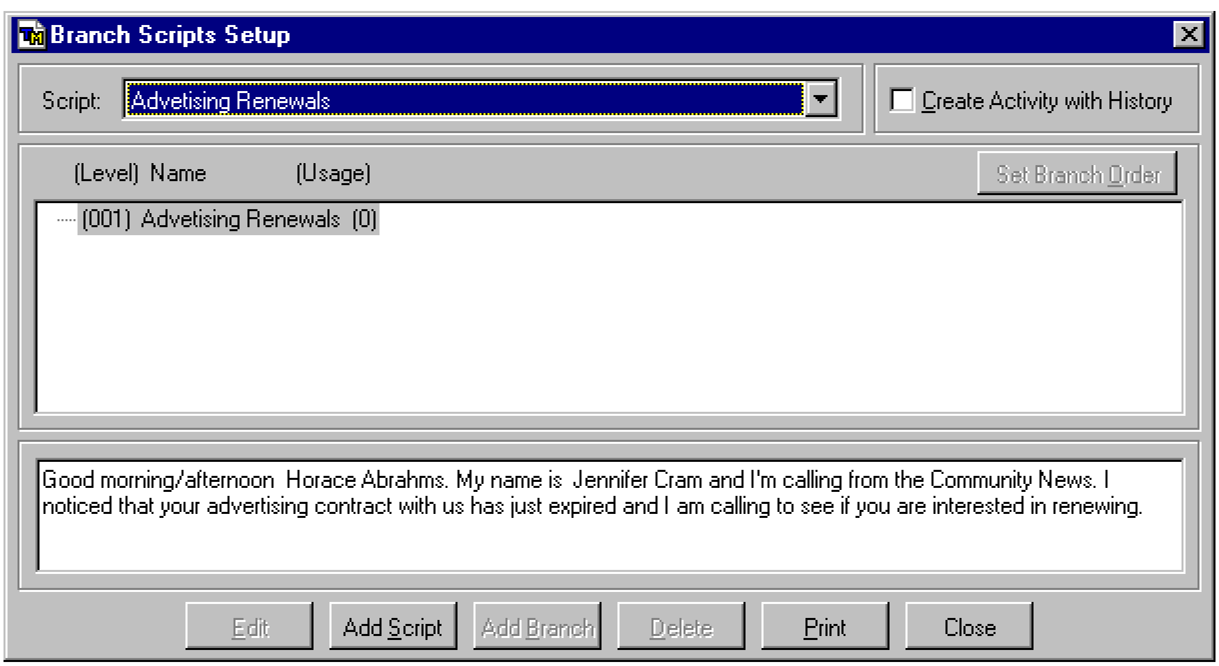
   Your completed dialog box may look something like this:




**Sample Add Branch/Script Dialog Box**

7. Click **Save**.

   The Branch Scripts Setup dialog box will now show the new script and the primary branch with its associated text:



**Sample Branch Scripts Setup Dialog Box**
**(Note: Because you have not yet added any child branches, the list of branches on the left shows only the primary branch.)**

Now that you have set up the script and its primary branch, you are ready to create the branches that make up the rest of the script. This is done by progressively adding new branches to each branch that is already in your script. For example, taking the sample script flow shown earlier, first create the branches “Interested in renewing” and “Not interested in renewing” attached to the “Advertising Renewals” branch. Next, add the child branches “6 Months” and “1 Year” to the branch “Interested in renewing,” and so on.

8. Click **Add Branch** to add a child branch.

9. Enter the title of this child branch in the `Branch:` field.

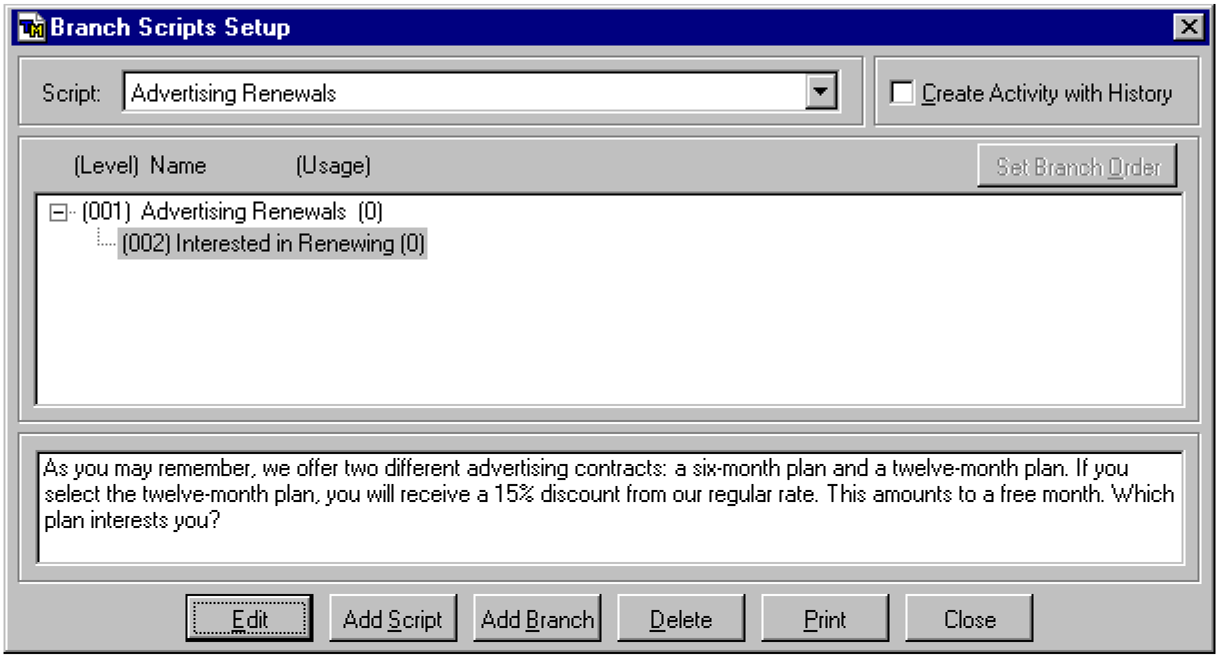
   **Example:** Interested in renewing.

10. Write the text of the branch in the notepad field. This is the text that will appear when a user selects this branch. (Click **Insert Expression** to activate the Branch Expression dialog box if you would like to include information about the contact in the text.)

    **Example:** As you may remember, we offer two different advertising contracts: a six-month plan and a twelve-month plan. If you select the twelve-month plan, you will receive a 15% discount from our regular rate. This amounts to a free month. Which plan interests you?

11. When finished, click **Save**.

    The dialog box will look something like this:




**Sample Child Branch**

The item you have just added will appear in the list of branches beneath its parent branch, preceded by a number indicating how many levels deep it is. (For example, the primary parent branch is preceded by “001”. Immediate children of this branch are preceded by “002”, and so on.) A number in parenthesis follows each branch title, indicating how many times the branch has been used.

12. Repeat steps 8 through 11 for each of the child branches.

**WARNING!**
Make sure that you have highlighted the correct parent before adding a branch. If you highlight the wrong branch by mistake, you will have to delete the child branch later and repeat this step with the correct branch highlighted. Any additional child branches created under the child branch that is deleted will also be deleted.

When you double-click a branch, or click on the plus (+) symbol to the left of the branch, any children attached to this branch will appear below it. The branches will be shown in the order in which they will appear when you actually use the script. If one or more of the branches will be more commonly used than the others, you can change the order to place those branches at the top.

13. If you want to change the order of the Child Branches, click **Set Branch Order**.

    Click and drag the item to its new position.

14. Click **Set Branch Order**.

A message will appear asking if you would like to save the current order of branches.

15. Click **Yes**.

    You will be returned to the Branch Scripts Setup dialog box.

    When a script is used, TeleMagic will record a history of each branch that has been used in the current conversation. It is possible to create an activity in your Activity Manager linked to the current contact with the type `Branch Scr` and this history pasted into the `Comments` field.

16. When the script is complete, and all branches and their children have been made, click **Close**.

    The Branch Scripts Setup dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Adding_Contact_Manager_Fields)<<1} Adding Contact Manager Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Hot_Keys_for_the_Font_Controls_on_the_Edit_Script_Dialog_Box)<<1} Hot Keys for the Font Controls on the Edit Script Dialog Box

# Adding Contact Manager Fields to a Script

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

It is possible to create a link between your script and the Contact Manager. You can actually enter data into a contact record right from the Branch Scripting dialog box.

## To Include Contact Manager Fields in your Script:

1. In the Contact Manager, go to the database and level containing the field(s) you would like included in your script. (If you will be using fields from multiple levels, go to the lowest level from which you will be selecting fields.)

2. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

The Branch Scripts dialog box will open.

3. Click **Setup**.

The Branch Scripts Setup dialog box will open, displaying the details of the topmost script.

4. Select the appropriate script from the `Script:` drop-down list.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|PROCEDDN.BMP<JumpId(TM.HLP>thirdï¿½SCRIPT1 Script Setup)<<1}

**or** Add a new script following the instructions in To Set Up a New Script.

5. Determine where in the script you might need to enter data into the contact record. For example, you may have a field defined to contain information on a customer's

primary product interest. Find which branch of the script contains a question on product interest.

6. Highlight the branch which is to have field access, and click **Fields**.

   The Edit Branch dialog box will open.

7. Click **Associate Fields**.

   The Script Fields dialog box will open with a list of all of the available fields. You will have access to fields from the current database.

8. From the `Available fields from [level]` list, choose the field you would like to access when using the script. If you are asking a series of questions, each related to a Contact Manager field, select each field at this time.

   To make your choice, highlight the field and click **Add**. The field name will move to the `Selected fields from [level]` list. Repeat this operation for each field. If you want to have access to all available fields, click **Add All**. To de-select any chosen field, highlight the field in the list on the right and click **Remove**. To de-select all of the fields, click **Remove All**.

   The fields will appear in the order they are added. If you add all of the fields at once, they will appear in alphabetical order. You will be able to change the order of the fields after they have been added.

9. To change the order, click the mover button to the left of an item, drag it to its new position, and drop it.

10. When your fields are set up, click **OK**.

    You will return to the Branch Script Setup screen.

11. To associate fields with another branch, select the branch and repeat steps 5 through 10.

12. Click **Save** to save changes and exit the Branch Script Setup screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

# Using Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCRIPTX_Using_Scripts_Hint)<<1}

When you speak with a customer or prospect, questions that are asked and statements that are made will lead you down a particular path. A TeleMagic script helps you control that path, provides you with the information you need every step of the way, allows you to quickly back up if the conversation suddenly changes direction, and creates an automatic recording of the branches followed for later reference.

To Navigate Through a Sample Script:
To Make a Call Using a Script:
To Answer a Call Using a Script:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_What_are_Scripts)<<1} What are Scripts?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

## Navigating a Script

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SCRIPTX_Navigating_a_Script_Note)<<1}

TeleMagic comes with a number of sample scripts; one in particular, “New Subscriptions," is short and simple. It scripts a specific promotion for an imaginary newspaper’s New Subscriptions department. It offers a prospective subscriber three weeks’ worth of free newspapers. The prospect may be:

- Interested, in which case they hear more details about the offer while their database record is checked for accuracy, or if necessary, added.
- Not interested, in which case they will hear reasons to change their mind. (If they change their mind, they will be treated like the interested party, above; if not, they will be encouraged to consider subscribing in the future.)
- Already a subscriber, in which case the call is ended as quickly as possible.

Use the sample script to practice navigating a script. Once you are familiar with how scripts work, create your own following the guidelines in Adding New Scripts.

### To Navigate through a Sample Script:

1. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

The Branch Scripts dialog box will open, showing the first branch of the first script.

2. From the `Script:` drop-down list, choose the script you want to explore.

3. This screen is principally composed of two large fields. They work together as follows:
   - The field on the left side of the Branch Scripts screen can display either the branch structure of your script or the contents of any fields associated with the selected branch. To display the associated field information, click the **Fields** tab. If the **Fields** tab is not available, there are no fields associated with the selected branch. You can use this display feature to edit the contents of any associated field.
   - The field on the right side of the Branch Scripts screen displays the text of the selected branch. You can change the relative sizes of the two fields by moving your cursor over the dividing bar and, when your cursor changes to the double-headed arrow, clicking and dragging the dividing bar to the desired position.
   - Clicking any branch will make it the current

branch. Its script will then be shown in the field on the right. Double-clicking any branch will toggle whether its child branches are displayed in the field on the left, if the branch has child branches.

- Clicking **Contact** will switch you over to the current contact record without losing your place in the script. To return to the Branch Scripting dialog box, click the Branch Scripting icon. Or, select **Branch Scripting** from the **Office** menu. You will be returned to the place in the script where you left off.
- You can return to the previous branch by clicking on it in the field on the left side of the screen. You will not be able to return to the previous branch if the child branches of the selected branch are open in the tree view. Double-click the selected branch to close its child branches in the tree view.
- Clicking **Reset** will bring you back up to the primary branch of the current script, and create the activity if you have selected that option.
- Clicking **Setup** will allow you to create a new script or modify an existing script. This option is only available to supervisor users.
- Click **Close** to close Branch Scripting.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_To_Make_a_Call_Using_a_Script)<<1} To Make a Call Using a Script:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_To_Answer_a_Call_Using_a_Script)<<1} To Answer a Call Using a Script:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

## To Make a Call Using a Script:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Groups of Users;Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

1. From the Contact Manager, display the record for the contact you want to call.

2. Use the TeleMagic Dialer to dial the phone and access the Call Notes dialog box. (See the Dialing Outgoing Calls topic for more information.)

3. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

The Branch Scripts dialog box will open, showing the first branch of the topmost script.

4. Select the script you want to use during your call from the the `Script:` drop-down list.

5. Read the text of the current branch as it appears in the field on the right side of the screen.

6. To adjust the size of the viewing window, move your cursor over the dividing bar between the left and right sides of the dialog box. When the cursor changes to the double-headed arrow, click and drag the dividing bar to the desired position.

7. When you are ready to move to the next branch, click on the appropriate branch in the tree view. This will normally be based on the response of the contact. If the child branches of the current branch are not open, double-click on the current branch to open them.

8. Continue clicking child branches and reading the branches' text until you reach the end of your script (the script may have several ending points depending on its construction and purpose).

9. You can click **Contact** to switch to the current contact record and enter data directly into your database anytime. Click the Branch Scripting icon on the toolbar to return to your script.

**or** Click on the **Fields** tab to access any fields associated with the selected branch. You can edit these fields as necessary. Use the scroll bars to locate the field you need to edit. Change the size of the Fields page as in step 6. Click on the **Save Field Changes** button to save the changes to the database. If this is a memo field, the information will be appended to the existing field information, along with a notepad stamp containing the date, time and User ID. With any other field type, this information will overwrite the existing information. If the field has a list box, place your cursor in the Input field and press F2 to select the text to input from the field's list box.

**or** You may switch to the Call Notes dialog box and add comments by clicking the **Dial** button on the toolbar (if configured), or selecting **Office**, **Dial Notes** from the main menu. Click the Branch Scripting icon on the toolbar to return to your script.

10. When the call is complete, switch to the Call Notes dialog box (by clicking the Dial button on the toolbar), and click **Terminate**.

11. Add any extra notes in the Comments field if necessary, and click **Save**.

12. If you will not be making another call, return to the Branch Scripting dialog box and click **Close**.

**or** To place another call, go to the record of the contact you want to call and dial the phone.

13. If you will be using the same script, click **Reset** and follow steps 5 through 9.

**or** To use a different script, select the script from the Script drop-down list and follow steps 4 through 9.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_To_Answer_a_Call_Using_a_Script)<<1} To Answer a Call Using a Script:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_To_Navigate_Through_a_Sample_Script)<<1} To Navigate Through a Sample Script
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_What_are_Scripts)<<1} What are Scripts?
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

# To Answer a Call Using a Script:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|PROCEDDN.BMP<JumpId(TM.HLP>thirdï¿½DIALER_Answering_the_Phone)<<1}

1. Answer the phone following the instructions in the Answering the Phone topic.
2. Determine the purpose of the call.
3. If there is a script applicable to the subject of the call, select **Branch Scripting** from the **Office** menu.

**or** Click the Branch Scripting icon on the toolbar.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<PROCEDUP.BMP|PROCEDDN.BMP<JumpId(TM.HLP>thirdï¿½

4. Follow steps 4 through 13 in the To Make a Call Using a Script. topic.

½SCRIPT1_To_Make_a_Call_Using_a_Script)<<1}

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_To_Navigate_Through_a_Sample_Script)<<1} To Navigate Through a Sample Script

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_What_are_Scripts)<<1} What are Scripts?

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

## Hot Keys for the Font Controls on the Edit Script Dialog Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

The font control toolbar (RTF controls) on the Edit Scrip dialog box can be changed using the following hot key combinations:

```
CTRL+F    -    sets focus to the font name drop down
CTRL+S    -    sets focus to the font size dropdown
CTRL+B    -    toggles the bold setting
CTRL+I    -    toggles the italic setting
CTRL+U    -    toggles the underline setting
CTRL+O    -    displays the color picker dialog
CTRL+L    -    left align
CTRL+E    -    center align
CTRL+R    -    right align
```

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Changing_Scripts)<<1} Changing Scripts:

## Changing Scripts:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

As you see how well your script functions, you will most likely need to adapt it so that it more fully reflects the needs of its users. Adapting it can mean any combination of the following:

Adding new branches
Renaming and changing the contents of existing branches
Changing the order of branches
Adding and removing fields
Deleting branches (and Scripts) which serve no practical purpose
Printing full scripts, or an outline of a script’s branches

# Adding Branches to Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ï¿½ )<<1}

## To Add a Branch to a Script:

1. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

The Branch Scripts dialog box will open.

2. Select the script you would like to modify from the `Script:` drop-down list.

3. Click **Setup**.

The Branch Scripts Setup dialog box will open.

4. Select the branch to which you want to add the new child branch.

5. When you have selected the appropriate parent branch, click **Add Branch**.

The Add Script dialog box will appear.

6. Type the name of the new branch in the `Branch:` field.

7. Type the text of the new branch in the notepad.

8. To include information specific to the contact in the script, such as the contact's name or the last time he or she was contacted, place your cursor at the appropriate location in the script and click **Insert Expression** to open the Expression Builder.

See the Expression Builder topic for more information about using the Expression Builder.

9. Once you have completed your script, click **Save**.

You will be returned to the Branch Scripts Setup dialog box.

10. Repeat steps 4 through 9 as needed.

11. Click **Close** to exit the Branch Scripts Setup dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Hot_Keys_for_the_Font_Controls_on_the_Edit_Script

_Dialog_Box)<<1} Hot Keys for the Font Controls on the Edit Script Dialog Box

# Editing Branches in Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

## To Edit the Name and Contents of a Branch:

1. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

The Branch Scripts dialog box will open.

2. Select the script to be modified from the `Script:` drop-down list.

3. Click **Setup**.

The Branch Scripts Setup dialog box will open.

4. Highlight the branch you want to edit and click **Edit**.

The Edit Branch dialog box will open, showing the name and the text of the branch you want to change.

5. If desired, change the name of the branch in the `Branch:` field.

6. Make any changes or additions to the text of the branch. To include contact information, such as the contact's name, company, address, etc., press F2 to open the Branch Expression dialog box. (See the Expression Builder topic for more information about using the Expression Builder.)

7. Click **Save**.

You will be returned to the Branch Scripts Setup dialog box.

8. Click **Close**.

The Branch Scripts Setup dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Hot_Keys_for_the_Font_Controls_on_the_Edit_Script_Dialog_Box)<<1} Hot Keys for the Font Controls on the Edit Script Dialog Box

# Reordering Branches in Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ï¿½ )<<1}

## To Rearrange the Order of Branches in a Script:

1. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

The Branch Scripts dialog box will open.

2. Select the script to be modified from the `Script:` drop-down list.

3. Click **Setup**.

The Branch Scripts Setup dialog box will open.

4. Double-click the branch that contains the child branches you want to sort.

**or** Click the plus (+) symbol next to the branch name.

The child branches will appear below the branch.

5. Click **Set Branch Order**.

6. To change the sort order, click and drag the item to its new position.

7. Click **Set Branch Order**.

A message will appear asking if you would like to save the current order of branches.

8. Click **Yes**.

You will be returned to the Branch Scripts Setup dialog box.

9. Click **Close**.

The Branch Scripts Setup dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

# Adding and Removing Fields in Branch Scripting

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

## To Edit the List of Fields:

1. In the Contact Manager, go to the database and level containing the field(s) you would like included in your script.
2. From the **Office** menu, select **Branch Scripting**.

**or** Click the Branch Scripting icon on the toolbar.

3. Click **Setup**.

   The Branch Scripts Setup dialog box will open.

4. Select the appropriate script from the `Script:` drop-down list.
5. Highlight the branch of the script to which you would like to add fields, or containing fields you would like to edit, and click **Edit**.
6. Click **Associate Fields**.

   The Script Fields dialog box will open with a list of all of the fields available from the current level displayed in the Contact Manager and its parent level(s).

7. If you would like to add an additional field, highlight it in the `Available fields from [level]` list and click **Add Field**.

**or** If you would like to remove a field from the script, highlight it in the `Selected fields from [level]` list and click **Remove**.

8. When your fields are selected, click **OK**.
9. Click **Save**.

   You will return to the Branch Scripts Setup screen.

10. Select another branch and repeat steps 5 through 8.

**or** Click **Close** to exit the Branch Scripts Setup screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

# Deleting Branches and Scripts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

To Delete a Branch From an Existing Script:
To Delete a Script:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

# To Delete a Branch From an Existing Script:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Office** menu, select **Branch Scripting**.
2. Select the script to be modified from the `Script:` list.
3. Click **Setup**.

   The Branch Script Setup dialog box will open.
4. Highlight the branch you want to delete and click **Delete**.

   A message will appear asking you to confirm your decision to delete the branch and all related child branches.
5. Click **Yes**.

   The branch and any child branches that may be attached to it will be removed.

   You will be returned to the Branch Scripts Setup dialog box.
6. Click **Close**.

   The Branch Scripts Setup dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_To_Delete_a_Script)<<1} To Delete a Script:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

# To Delete a Script:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Office** menu, select **Branch Scripting**.
2. Select the script to be deleted from the `Script:` list box.
3. Click **Setup**.

   The Branch Scripts Setup dialog box will open.
4. Highlight the primary parent branch in the list, the one preceded by Level (001), and click **Delete**.

   A message will appear asking you to confirm your decision to delete the branch and all related child branches.
5. Click **Yes**.

   The script and all of its branches will be removed. You will be returned to the Branch Scripts Setup dialog box. The next script down on the script list will be shown.
6. Click **Close**.

   The Branch Scripts Setup dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_To_Delete_a_Branch_From_an_Existing_Script)<<1} To Delete a Branch from an Existing Script:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

# To Print a Script

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Branch Scriptingï¿½ ï¿½ ï¿½ )<<1}

The Print option allows you to print a copy of your scripts. You have the option of printing the current script or all of the scripts. You can choose to print just the branch names, or the script text from each branch, as well as their usage amounts. The branch names and the script text will include any expressions that also may be included.

Access to print and edit scripts is only available to users with supervisor security access. Only one user may access Branch Scripting setup at a time.

## To Print a Script

1. From the **Office** menu, select **Branch Scripting**.

   The Branch Scripts Setup dialog box will open.

2. Click **Setup**.

3. If you want to print a single script, select that script from the `Script:` drop-down list.

4. Click **Print**.

   The Branch Scripts Report dialog box will appear.

5. If you want to print the currently selected script, leave the `Current Script` radio button selected.

**or** If you want to print all scripts, select `All Scripts`.

6. If you want to include the text of the scripts, mark the `Include Text` checkbox.

**or** If you want to include only the branch names, unmark `Include Text`.

7. If you want to preview your script report before printing click **View**. (See the topic Page Preview for information on using the Page Preview window.)

8. When satisfied with your selections, click **Print**.

   The Windows Print dialog box will open.

9. Adjust your printer settings if necessary and click **OK**.

   Your script(s) will print.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT2_Changing_Scripts)<<1} Changing Scripts:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Using_Scripts)<<1} Using Scripts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

______154.BMP<JumpId(TM.HLPï¿½SCRIPT1_Script_Setup)<<1} Script Setup

## Note for Script Setup

Access to the Script Setup feature is limited to Supervisor users.

As you plan, do not forget that the user will be able to freely switch between the script, the Call Notes dialog box, and the Contact Manager. At certain points, the most appropriate thing for a branch to do is to direct the user to add or edit a contact record, filling information directly into the database. You should avoid adding branches that merely repeat a set of questions that could be asked directly from the contact screen.

## Note for Step 1

You must have a contact database open to access Branch Scripting.

## Note for Step 2

If you are not a Supervisor user, the **Setup** button will be dimmed.

## Hint for Step 9

As long as a branch is not the primary branch, you can click **Insert Expression** to access the Expression Builder to include field or variable information in the branch name. Be aware, however, that both the first and last character in the field cannot be part of an expression. (For example, you may use **<<contact2.contact>> Query** because the entry ends with the word “Query”; or you may use **Hello, my name is <<cUserName>>** because the first word is “Hello”; but you may not use **<<contact1.company>>** as the entire branch name.

## Note for Step 3

If you are not a Supervisor user, the **Setup** button will be dimmed.

## Note for Step 8

When the script is actually used, only fields from the current level at that time and its parent(s) will be available. For example, if you have set your script up to contain fields from all three levels, then access the script from Level 2, you will only be able to see fields from Levels 1 and 2. Additionally, if a user does not have field level security rights to a field, it will not be on the list.

## Hint for Using Scripts

Before making a call using a script, consider familiarizing yourself with the Branch Scripting dialog box by navigating through a sample script.

## Note for Navigating a Script

The New Subscriptions script was based on Level 2 of the Company/Contact database. See Opening a Different Database for help in accessing this database.

## Hint for Step 4

If you are not sure to which branch you would like to add a child branch, you can view the text of any branch by highlighting it in the list and referring to the text displayed beneath the list of branches.

## Hint for Step 8

If you want to greet the contact by name in the script, create an expression to include the contact name field from the Contact Manager. This information will change in the script depending on what contact record is currently displayed in the Contact Manager.

## Note for Step 4

If you have selected the highest level of the script for changes, the Edit Script dialog box will be displayed instead. This dialog box functions the same as the Edit Branch dialog box, except as noted.

## Note for Step 5

If you are working in the Edit Script dialog box, this field is labeled `Script:`.

## Hint for Step 3

If the full name of a branch does is not displayed because the field is too narrow, move your cursor over the branch name. A ToolTip will open displaying the full name.

## Note for Step 9

Templates are not applied to fields in Branch Scripting. This only affects the way data is displayed in Branch Scripting. When you enter data to your database from Branch Scripting, the template will be applied when the information is displayed in your database. This is true of fields with built-in templates, such as Recall fields, as well as fields where you have defined the template.

## Note for Step 4

This will grant users the ability to open the Preferences screen and set their own User Preferences. This will also give you the option of allowing access to Database preferences for any databases to which you are granting the group access. (Installation preferences are only available to Supervisor users.) See Preferences and Security for more information.

## Notes for Step 5

If a user is a member of more than one security group, TeleMagic combines rights, allowing access to the user of any feature allowed by any group to which the user belongs. (Of course, if a user is a member of the Supervisor group, he or she will have full rights to all features automatically.) This is useful if you want to add to the security rights of some members of a group and not others. Instead of creating a new group that combines all features, and moving the desired users out of their existing group and into the new one, you can simply add a group with the new access—TeleMagic will combine the rights for you.

Make sure that all users are members of at least one security group. If a user is not a member of a security group, that user will not be able to access existing databases. If you are adding users instead of copying a template user, by default, those users will have no rights.

## Note for Database Preferences Check Box

If you did not grant the group rights to edit preferences on the main System Level Security screen, `Database Preferences` will be dimmed on this screen.

## Note for User Reports: Edit Check Box

TeleMagic uses the FoxPro report generator, which does not respect field level security. If users have rights to add or edit reports, they will be able to report on information they would not normally be able to see in the database. If this database contains sensitive fields that you do not want this group to view, you should limit their rights to add and edit reports.

## Note for Step 12

By default, users will have access to open, modify, and delete all records in the database. If you do not want to limit access, skip to step 15.

## Hint for Step 8

Consider creating the filter first in the Contact Manager to test that it is actually isolating the desired records. This will avoid any unwanted surprises due to inaccurate filter specifications.

## Hint for Step 7

If the database contains fields that you do not want the users in this group to see, consider leaving the `Edit` and `Add` check boxes empty under `User Reports`.

## Note for Step 4

If you are logged in as a non-supervisor user and are changing your own password, this dialog box will look slightly different. You will be required to enter your current password before being allowed to change it.

## Note for Step 6

If the entries do not match, you will be required to enter the passwords again.

## Hint for Step 7

Make sure you note the password and give it to the user. The user will be required to enter the password to access TeleMagic.

# Security

# TeleMagic Security versus Network Security

Access to change TeleMagic Enterprise security settings is restricted to supervisor users.

We recommend that you plan and set up your network's groups and security first, before installing TeleMagic.

TeleMagic security should not be confused with network security, although the two can and should work together. Network security can contain groups. These groups should not be confused with TeleMagic's security groups. Network security groups control access to directories and files on the network. TeleMagic's security groups relate only to access to areas of TeleMagic.

TeleMagic's security allows you to control which databases users can access. Within the databases, you can control what records users may view, edit, and delete. (A user would not even know about being unable to reach every record in the database if he or she were not granted view rights.) You can also control what fields in a record users can view. (You can use this to allow general access to a record, but restrict sensitive data to users who need to see it.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_Planning_Security_within_TeleMagic)<<1} Planning Security within TeleMagic

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_To_Add_a_Security_Group)<<1} To Add a Security Group:

# Planning Security within TeleMagic

Owners of the single-user version of TeleMagic need not bother with security, unless several people are going to share the same PC. If so, everything here still applies, although only one person can use the product at a time.

TeleMagic security has two major branches: *system* security and *database-related* security. A system administrator creates and adds members to security groups; defines exactly what system features and databases each group will be able to access; and then, taking one database at a time, decides what database-related features and database fields that group will be able to access.

TeleMagic security is based on granting enough access to users that they can get their work done, but no more. This allows users to store important information in TeleMagic without worrying that it will be seen by prying eyes. Additionally, it can prevent unqualified users from performing sensitive TeleMagic functions, such as group delete and rebuild.

You do not have to use TeleMagic security, but we strongly recommend doing so if you have any sensitive information you want to keep protected, or if you want to limit system administration in TeleMagic. If you do not want to use TeleMagic security, assign all users to the Supervisor security group.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_TeleMagic_Security_versus_Network_Security)<<1} TeleMagic Security versus Network Security

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_To_Add_a_Security_Group)<<1} To Add a Security Group:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1} Security

# To Add a Security Group:

Security is controlled from the TeleMagic security screens. There are two security dialog boxes: the System Level Security dialog box, and the Database and Field Security dialog box. The System Level Security screen is where security groups are actually created. This screen also controls who is a member of which security group, and to which of the major features and databases the group has access.

## To Add a Security Group (Set System Level Security):

1. From the **Options** menu, select **Security**.

   The System Level Security dialog box will open, with the first group in alphabetical order showing in the `Change settings for security group:` field.

   You have the choice of adding a security group by copying an existing group, or adding one from scratch. Copying a group will give the new group the same access rights by default. Adding will create a group with no default access.

2. If you want to add a security group based on an existing group, highlight the group and select **Copy**.

**or** If you want to add a group with no default security, click **Add**.

3. Type the name of the new group into the `Change security group description:` field.

4. Mark or clear the check boxes as necessary using the following guidelines:

   - Select `Add new database` if you want users in the group to be able to add databases at the Select Database dialog box.
   - Select `Delete databases` if you want to grant users in the group rights to delete existing databases.
   - If you want users in the group to be able to access Preferences, mark the `Edit preferences` check box.
   - Mark `Allow rebuild` if you want to grant members of the group access to the Rebuild feature.

**WARNING!**
If you grant rebuild access, make sure the users in the group have read the Rebuild topic. They should pay close attention to the warnings against running a rebuild while other users are in TeleMagic.

5. From the `Current members` list, add or remove any users from the group as necessary. (Users in the group will have an `X` to the left of their names.) To add a user

who is not in the group, double-click on the user. An `X` will appear next to the user's name. To remove a user, double-click on the user. The `X` will be removed from beside the user's name.

Members of this security group will be able to access only databases that appear in the `Accessible Databases` list.

6. To grant access to a database, click the name of a database in the `Existing databases` list to highlight it.

   - Click **Add** or double-click the selected database to cause it to appear in the `Accessible Databases` list.
   - Click **Add All** to cause all the existing databases to appear in the `Accessible Databases` list.

7. To make a database inaccessible to members of the group, highlight the database in the `Accessible Databases` list.

   - Click **Remove** or double-click a database in the `Accessible Databases` list to cause the selected database to disappear from the list.
   - Click **Remove All** to cause all databases to disappear from the `Accessible Databases` list.

8. If you want to set security for the databases to which you have granted access, highlight the database and click **Database security…**. Refer to To Add Database Security and Visibility Rules to a Security Group: for details.

**or** Click **Save** to save the new group.

If you added this group by copying an existing group, users will have the same access to the databases on the list that the original group has. If you have added the security group by clicking **Add**, users will have access to all records, but they will only be able to view rollup lists. (No other fields will be available.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_To_Add_Database_Security_and_Visibility_Rules_to_a_Security_Group)<<1} To Add Database Security and Visibility Rules to a Security Group:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1} Security

# To Add Database Security and Visibility Rules to a Security Group:

In many companies, users will keep sensitive information in their TeleMagic databases. If none of the information in the database has to be shared, a user can keep it private by creating and saving the database to his or her local hard drive. However, non-sensitive information in the database must often be shared. The best way to do this is by keeping it on the network, in a directory accessible by everyone. To protect sensitive data, but still allow for general access to other parts of the same database, TeleMagic security options allow you to determine who can see and change specific data.

For example, you may have a group of order-fillers who should be able to *add* but not *change* existing information. You can use database security to limit their access to editing records, while allowing unlimited add rights.

If a user who belongs to a group with the security to view, but not edit, records attempts to edit a record, they will receive a Security Violation message. They will only receive the message once. In subsequent attempts they will be restricted from making changes, but will be barred from making changes.

Database-related security is controlled from the Database and Field Security Screen.

## To Set Database and Field Level Security:

1. If you have not already opened the System Level Security screen, select **Security** from the **Options** menu.

   The System Level Security dialog box will open.

2. From the `Change settings for security group:` drop-down list, select the group whose security you want to modify.

3. If it is not already there, add the desired database to the `Accessible Databases` list. (Highlight it on the `Existing Databases` list and click **Add**.)

4. Select **Database security…** to bring up the Database and Field Security dialog box.

5. From the `Database Security for:` drop-down list, choose the database for which you want to establish security and visibility restrictions (if it is not already selected).

   The `Field Level Security` section allows you to control access to specific *fields*. You can either allow access to all fields, or you can limit access one field at a time. The `Full Access All Fields` checkbox will default to unchecked (which prevents accidental Full Access status), giving no access to any field in the selected database.

6. To grant complete access to all fields, select the `Full Access All Fields` check box, then skip to step

10.

**or** If you will be allowing the current security group access to all but a few fields in this database, click **Select All**. This will give them full access to all the fields in the database, but allow you to selectively change the access for individual fields. To remove the group's access to those individual fields that you have determined need to be hidden or unchangeable, refer to step 7.

**or** If you want to allow access to a limited number of fields in this database, click **Unselect All**. This will give members of the group no access to any fields. You can then selectively grant access to individual fields. To allow the group access to those individual fields that you have determined need to be visible or editable, refer to step 7.

7. Highlight the field you want to hide or show. It will appear in the `Selected Field` display. Change the `Field Access:` rights as follows:

- `No Access`—Allows no access of any kind to the field.
- `View`—The group will be able to view but not edit the field.
- `Edit/View`—The group will have full view and edit rights to the field.

If the highlighted field is a memo field, and you have selected `View` access, you can use the `Add Notes` check box to allow users to add notes to the memo field using the Add Note button ( • ) on the Contact Manager toolbar, without allowing them to edit existing notes.

8. If you want users to be able to access Add Note from the Contact Manager toolbar for the selected memo field, mark `Add Notes`. If this check box is unmarked, the field will not appear on the list of memo fields in the Add Note dialog box.

If you have selected `Edit/View` for the highlighted field, the `List Box Options:` radio buttons will become available.

9. Select `Use` if you want the group to be able to use, but not alter, the list box created for the field.

**or** Select `Modify` if you want the group to be able to use and alter the information in the list box created for the field.

10. In the `Database Specific Security` section of the screen, set the security group's access to various database-specific features using the following guidelines:

- Mark the `Add` check box if you want members of the group to be able to add records to the selected database.

- Mark `Import` if you want to allow members of the group to be able to import records into the database (bring them into TeleMagic).
- Mark `Export` if you want members of the group to be able to export records from TeleMagic to be used in other databases, or other applications.
- Mark `Group Options` if you want members of this group to be able to use the Group Replace, Group Delete/Recover, and Set Multiple Recalls features.
- Mark `Screen Designer` if you want members of this group to be able to design their own contact views or change existing views. (Each database level is composed of one or more views. A view defines the way fields and other objects appear on the screen.)
- Mark `Database Preferences` if you want the group members to be able to change the Database and Key Field preference settings for the database. If this is unmarked, users will not be able to access database related preferences on the Preferences screen.
- Mark `Filters: Edit` to grant users rights to edit existing filters for the database. Mark `Add` to grant rights to add new filters. With neither selected, users can only use existing filters.
- Mark `Indexes: Edit` to grant users rights to modify existing indexes for the database. Mark `Add` to grant rights to add new indexes. With neither selected, they can only use existing indexes.
- Mark `User Reports: Edit` to grant rights to edit existing quick lists and custom reports. Mark `Add` to grant rights to add new reports.

11. The Sales Forecasting feature allows you to track the progress of a sale from the initial contact through to the actual sale. At the time of the initial contact, a projected sale amount is entered. When the sale is closed, an actual sale amount is entered. A number of reports have been designed for productivity tracking and calculating profits. To maintain data integrity, you may want to limit users' access to edit and delete existing sales forecasts.

    Use the `Sales Forecasting:` radio buttons as follows:

    - `No Access` will bar members of the group from selecting the Sales Forecasting menu option or toolbar icon.
    - `Add/Limited Edit` is the default. This setting will permit access to Sales Forecasting, and allow users to add forecasts and to edit all but the `Rep`, `Quotation`, `Budget Amount`, `Projected Sale Date`, and `Probability of Closure` fields.

- `Full Edit/Add` will allow access to add sales forecasts, and allow users to change any forecast data later.
- `Delete/Full Edit/Add` will allow Full Edit access, and allow users to delete existing forecast records.

12. Use the **View…**, **Edit…**, and **Delete…** buttons to control access to specific records.

    Choosing any of these buttons will bring up the Record Expression dialog box, where you can build expressions to control access to groups of records.

13. Create a filter to define which records members of the group may view, edit, or delete. If no filter has been created for the group, users will have access to all records in the database. Once a filter is created, users will be able to access only records that meet the filter criteria. (These filters are created in exactly the same manner as Contact Manager filters. For help with creating filters, see the Creating Filters topic.)

14. When the filter expression is complete, click **OK**.

    You will return to the Database and Field Security screen.

15. Repeat steps 5 through 14 for each database to which the group has access.

16. When you have set the security for all applicable databases, click **Close**.

    You will return to the System Level Security screen.

17. Click **Save** to save any changes you have made to both the Database and Field Security and System Level Security screens.

18. Click **OK** to exit security.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_To_Add_a_Security_Group)<<1} To Add a Security Group:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1} Security

## Other TeleMagic Security Issues

User Security
Changing Passwords
Preferences and Security
Security Reports

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1}

# User Security

With the exception of activity security, there is no separate user security, per se; it is all administered through the group security options. (See To Add a Security Group: for details.)

If you want to give a single user a special security setup, you will have to create a security group with the desired settings, and make that user the only member of the group.

If a user leaves your company, you should be sure to delete the user from TeleMagic and use the Activity Archive feature to remove that user's activities. (Do not forget to delete his or her network login, too.) It is also a good idea to check for local databases, in case this user kept important information on the local hard drive.

One way users can protect sensitive data is to store databases and contact information on local hard drives, or in network directories accessible only to them. Make sure to warn users who store databases locally that their database description as it appears in the Database Selection dialog box should mention that the database is local and have some sort of unique identifier, such as the user's name.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1}

# Changing Passwords

Users can have their own passwords, an option that prevents unwanted users from easily logging in. We recommend that you assign TeleMagic passwords to all users in companies with any sensitive information.

In the event that a user forgets his or her password, TeleMagic Supervisor users may change users' passwords at any time.

## To Change a User's Password:

1. From the **Options** menu, select **Preferences**.

   The Preferences screen will open.

2. Click the **Users** tab.

   The User Preferences page will open.

3. Highlight the user whose password you want to change and click **Properties**.

4. Click **Change Password**.

   The Change Password dialog box will appear.

5. Enter a password for the user in the `Enter New Password:` field.

6. Enter the password again in the `Verify New Password:` field.

7. Click **OK** to save the password.

   The Change Password dialog box will close.

8. Click **OK**.

   The Properties dialog box will close.

9. Click **OK** to save changes and exit preferences.

**or** Click **Apply** to save changes without exiting.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1}

# Activity Security

Each user is responsible for granting security access to his or her own calendar. To maintain users' privacy, this is the one area of security that is not automatically granted to Supervisor users. (Supervisor users will be able to archive, or group delete, activities for a user who has not granted the supervisor calendar access.)

See the Multi-User Calendars topic for details on controlling access to your calendar.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1}

# Preferences and Security

TeleMagic Preferences can be divided into three areas: User Preferences, Database Preferences, and Installation Preferences.

User Preferences are settings that affect the current user only. Database Preferences affect all users working in the current database. System Preferences affect all users in all databases.

TeleMagic's security system gives you three possible configurations for security groups regarding preferences:

No access at all

You will fully deny access to the **Preferences** option on the **Options** menu if you place a user in a security group which, in the System Level Security screen, is given no rights to `Edit preferences`. (See step 4 under <u>To Add a Security Group:</u> for details.)

Before deciding to remove a security group's access to preferences, you should make sure that their current settings—especially their user preferences—are correct. Do this by printing a user preference report for that user. (See the <u>User Preference Report</u> topic.)

Bear in mind that without access to preferences, users may not be able to use some of the more basic TeleMagic features; for example, they cannot set up the Dialer feature, or set a path to a word processing program. On the other hand, restricting access to preferences forces the users to use the settings you have already configured for them. (If you restrict access to preferences, make sure that these areas are set up in advance if you want the users to be able to fully use TeleMagic.)

Access to User Preferences, but not to Database Preferences

You can control a security group's access to Database Preferences on a per-database basis. If a group has been granted overall rights to edit preferences, you will have the additional option of granting rights to edit Database Preferences. Rights to edit Database Preferences are allowed or denied on the Database and Field Security screen. (See step 10 under <u>To Add Database Security and Visibility Rules to a Security Group:</u> for details.)

If a group cannot edit database preferences, but can edit other preferences, Database Preferences will not be available.

Full access to user, database, and installation preferences

Only the Supervisor group will have full access to all preferences, including the sensitive installation preferences.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1}

# Security Reports

Once you have set up your security arrangements, you can generate a report on them at any time. There are two security reports: User and Group. These will report the security for one or more users, or a particular TeleMagic security group.

The Group Security Report lists every security group, including the rights for those groups and which users are members. See Group Security Report

The User Security Report shows the security setup for a particular user, including the group to which that user belongs, and which rights that user has. See User Security Report

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.HLPï¿½SECURITY_Security)<<1}

## The TeleMagic Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SERVERX_The_TeleMagic_Automation_Server_Note)<<1}

When sending faxes and wireless messages, you have the option of sending immediately from your workstation, or sending to a queue. The TeleMagic Automation Server allows you to process those queues to send groups of faxes, wireless messages, e-mail messages, and documents.

When setting up the Automation Server, you create one or more Server IDs and establish specific configuration settings for each. You are then able to select a Server ID on a workstation to process your queued faxes and wireless messages. You can have up to eight faxmodems on a workstation being used as a server, and an unlimited number of servers on multiple workstations processing simultaneously.

Once your Automation Server is set up, processing is a simple matter of selecting a server and a queue, then clicking a single button. TeleMagic does the rest. You are able to maintain your Automation Server system, print items in the queue, edit the details of items, and print TeleMagic reports on how items were processed.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Parameters)<<1} Automation Server Parameters

# Automation Server Setup

Automation Server System Requirements
Before Setting Up the Server You Need to Know:
To Check That Windows Recognizes Your Faxmodem:
Setting Up a Queue
Configuring Modems
Setting Up a Server
Creating a Fax Banner
Establishing Server Downtime
Establishing Your Word Processors
Setting the Automation Server Password

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1}
Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Server Pre-Setup Checklist

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SERVERX_Server_Pre_Setup_Checklist_Note)<<1}

Where are the faxmodems installed?

1)________________________________________________

2)________________________________________________

3)________________________________________________

4)________________________________________________

5)________________________________________________

6)________________________________________________

7)________________________________________________

8)________________________________________________

Will the server be set up on:

- ❑ A dedicated machine
- ❑ A user’s workstation

Multiple queues required?

- ❑ Yes
- ❑ No

Multiple servers required?

- Yes
- No

Will your server be processing:

- Faxes
- Wireless Messages
- E-mail

Will your server be:

- Merging documents
- Merging faxes
- Both

*To print this checklist, select* Print Topic *from the* File *menu.*

# Before Setting Up the Server You Need to Know:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½SERVERX_Before_Setting_Up_the_Server_You_Need_to_Know_Hint)<<1}

Some processing terminology

If you do not know the difference between a server and a queue, or are not sure what a faxmodem does, we recommend looking at the definitions of these terms provided in the *Glossary*, found by clicking the **Glossary** button that appears at the top of every Help topic.

Where your faxmodems are installed

You may only send faxes from a computer that has a faxmodem installed. (TeleMagic can use up to eight locally installed faxmodems to process faxes.) If you are running on a network, the workstation that will be your server needs to be able to access the global directory of TeleMagic (the directory where TeleMagic is installed), since the server software must be run from there.

Whether you will set up the server on a dedicated machine, or run it from a user's workstation

Processing faxes, wireless messages, and e-mail messages that have been sent to a queue can tie up your machine for quite some time. This is not a problem if you only process the queue after hours, or when there is no one using the workstation that has been set up with a faxmodem. However, in most multi-user environments, it makes more sense to dedicate one or more computers solely to processing faxes.

Whether you need to set up multiple queues, and/or multiple servers

A queue is a holding place for faxes, wireless messages, and e-mail that are going to be processed by a server. A queue lists faxes, wireless messages, and e-mail messages in the order in which it received them, and generally shows details about each item. For example, it shows when an item was added to the queue; when a server processed (i.e., tried to send) it; and whether it was sent successfully or not. TeleMagic allows you to use up to ten separate queues, which can be processed by an unlimited number of servers. One queue should be adequate for most offices, but there may be times when a second or third queue will let you manage the server's output more efficiently. For example, you might have a queue for urgent faxes and wireless messages, which is processed during the day, and another for less important items, which can be processed after hours.

Within the TeleMagic Automation Server, you can set up multiple server IDs with unique configuration settings for actual processing. If you are running the Automation Server program on more than one computer, each must use a different server ID. Because each server ID is run at a different workstation, they are referred to simply as a server. If a computer has no other purpose but that of processing faxes and wireless messages, it is referred to as a dedicated server. TeleMagic lets you add an unlimited number of servers to process your queues. In practical terms, this means that you can have multiple computers processing queued faxes and wireless messages at the same time.

The number of servers you create will depend on the volume of faxing and messaging that you need to handle. For instance, if one workstation with eight faxmodems constantly processing is not enough to handle the volume of faxes and messages that your office needs to output, you may want to consider setting up a second workstation (and therefore a second server) to help with processing.

Whether your servers will be processing faxes, wireless messages, e-mail, or all three

If you want to process wireless messages, you must devote one of your modems to wireless messaging. If one of your modems is devoted to wireless messaging, that leaves a maximum of seven faxmodems available for faxing. If you do a high volume of faxing, and seven modems devoted to faxing are not enough, you may need two servers processing on different workstations. Additionally, if you will be using the Print Server to process your Print Queue, you will either need to devote a workstation to printing, or you will need to set aside a time when your fax and messaging server can be devoted to printing.

Whether your servers should be devoted to merging documents only, faxing documents only, or both

When documents are faxed, they are printed to the fax print driver. This is very similar to printing a document to a printer, except that instead of outputting the printed document to paper from a printer, the printed document is outputted to a modem.

If you are faxing TeleMagic custom reports, or documents with a large number of merge fields, you may want to divide the task of printing and faxing among different workstations. If you want, you can devote one or more workstations to the task of opening documents, performing the merge, and printing them to the fax print driver. The workstation containing your modems can be devoted to faxing and will then only need to send out the prepared documents. This can significantly decrease the time that it takes to send out faxes.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Server_Pre_Setup_Checklist)<<1} Server Pre-Setup Checklist

# Automation Server System Requirements

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

If a workstation is going to be dedicated as an Automation Server workstation, the minimum hardware requirement is a Pentium 133 with 32 MB of RAM. The operating system requirements are the same as for TeleMagic Enterprise (Windows 95 or 98, or Windows NT 4.0). Windows NT 4.0 is strongly recommended for dedicated Automation Server workstations.

To avoid an IRQ conflict resulting from too many internal modems—and because the standard Windows COM driver is not reliable with multi-line processing in the background—the maximum internal modems supported is 2. To use more than 2 modems, you must use a multi-function (serial) board. If you are using up to 4 faxmodems, there are a variety of serial boards that can be used, such as Boca™, STB™, or DigiBoard™. If you are using up to 8 faxmodems, you should use a DigiBoard™ (from Digi International) or a RocketPort™ (from Comtrol). For more information, see your system administrator or reseller.

Before you can process your queues with TeleMagic, you should check that all faxmodems on the workstation that will be used as a server initialize correctly, and that they send faxes, e-mail, and wireless messages successfully. (Do this by installing and testing the software that accompanied your faxmodem.) See To Check that Windows Recognizes Your Faxmodem for instructions on checking your modem setup. Also review the information under Before Setting Up Local Faxing You Need to Know.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Check That Windows Recognizes Your Faxmodem:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

You should check that Windows recognizes each of your faxmodems before proceeding. If you are setting up a machine that will be a dedicated server (i.e., one that will be used for no other purpose than to process faxes, e-mail, and wireless messages that have been sent to a queue) and you want to use multiple modems on this machine, each modem must be checked in advance.

1. On the computer where the faxmodem is installed, from the taskbar, choose **Start**, **Run**.

   The Run dialog box will open.

2. Enter HYPERTRM to start HyperTerminal.

3. Click **OK**.

   The HyperTerminal program will open.

4. When prompted for a Connection Name, enter a descriptive connection name.

   ***Example:*** Modem Test

5. Select an icon for the Connection, then click **OK**.

6. From the `Connect using` drop-down list, choose the COM Port to which your faxmodem is attached, then click **OK**.

   ***Example:*** Direct to Com 2

7. Choose the appropriate baud rate from the `Bits per second` drop-down list..

8. Click **OK**.

9. At HyperTerminal's main screen, type ***at*** and press ENTER.

   HyperTerminal should return the message "`OK`" as shown here:

   ```
   at
   OK
   █
   ```

   This indicates that Windows recognizes the faxmodem. If Windows does not recognize it, you should refer to your faxmodem installation instructions.

   Once you have installed the faxmodem and its accompanying software according to the manufacturer's instructions, and have verified that it initializes and sends without error, and that Windows recognizes it, you can set up TeleMagic to send faxes and wireless messages.

10. From HyperTerminal's **`Call`** menu, select `Disconnect`.

11. From HyperTerminal's **`File`** menu, select `Exit`.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1}
Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|
______154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Setting Up a Queue on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

When users send faxes, e-mail, and wireless messages to the server, they are stored in an area called a queue. It is possible to establish up to ten separate queues. Queues are established by giving them a name.

When you create your queues, think about how you will be processing. If you have only one workstation that will be used as a server, and no special requirements, you may only need to establish one queue. If you will be using multiple workstations or have variable processing requirements, you may need to establish more than one queue. For example, you may want to have separate queues for different departments in your company, or establish one queue for general faxes and another for only Wireless Messages, e-mail, or high priority faxes.

When the Automation Server processes a wireless message queue, it will search the queue and identify all messages going to the same number. Any of these messages that are not specifically scheduled to be sent later will be sent concurrently, regardless of their position in the queue.

By default there are three queues already set up when you start TeleMagic:

Queue #1, named *TeleMagic Fax Q* by default, will be ready for use as soon as you install the program.

Queue #5, named *Print Queue* by default, is used to print word processing documents from the server. It does not matter which queue is used as the print queue; as long as any of your queues is named Print Queue, you will be able to use this feature. If you want to use more than one print queue, you can. As long as the queue name starts with **Print Queue**, TeleMagic will use it for printing (e.g., Print Queue 1, Print Queue 2, etc.). If you do not have at least one print queue, you will only be able to print word processing documents locally.

Queue #10, named *Local Faxes* by default, stores data about TeleMagic faxes that were sent directly from users' workstations without using the server. It is mainly useful for generating reports. If you do not need to have a queue dedicated to merely recording local faxing activity, you can rename queue #10 at any time. (Should you decide that you want to use the local fax tracking feature later, you can rename queue #10 so that it starts with the word *Local*, and it will be ready to send local faxes once again.)

Queue #1 and Queue #10 cannot be deleted. You can change the current name, but you cannot remove the queue.

## To Set Up the Queue(s):

1. Double-click the Automation Server icon in the TeleMagic Enterprise program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open.

2. Click **Queue**.

   The Queue Edit dialog box will open, showing the current queues. (See above for more on the default queues.)

3. Highlight the queue you want to activate or rename, and click **Edit**.

   **Example:** If you want to activate Queue # 3, highlight the third line.

   A cursor will appear in the `Queue Name:` field.

4. Enter a new name for the queue in the `Queue Name:` field.

5. Click **Save**.

   The queue name will appear in the list.

6. To exit the Queue Edit dialog box, click **Close**.

   You will be returned to the main Automation Server Setup screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Configuring Modems on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Configuring_Modems_on_the_Automation_Server_Note)<<1}

You should already have decided what workstation is going to be used to process faxes, e-mail, and wireless messages, and have installed and tested one or more faxmodems on that workstation. (If you will be processing from more than one workstation, modems must be installed and tested on each.)

You are now ready to configure your modems for faxing, e-mail, and wireless messaging.

To Configure a Wireless Messaging Modem:
To Configure Modems for Faxing:
To Configure a Modem for E-mail:
To Configure a Modem for DSS E-mail:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Configure an Automation Server Wireless Messaging Modem:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder:

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The TeleMagic Automation Server will open.

2. Click **Configure**.

The Faxmodem Configuration dialog box will open.

3. Click the **Wireless Messaging** tab.

The Wireless Messaging Setup page will open. The field on the left side of the page will contain a list of all faxmodems configured on this machine. Each device listed will have an icon associated that indicates how it is being utilized.

4. In the Use Wireless Messaging Device Name field, mark the checkbox associated with the device to be used with wireless messaging.

The entry in the list on the left side for the selected device will be updated to indicate that it will be used for Wireless Messaging. Only one device can be used for Wireless Messaging.

5. Click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_Modems_for_Faxing)<<1} To Configure Modems for Faxing:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Modem_for_E_mail)<<1} To Configure a Modem for E-mail:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Modem_for_DSS_E_mail)<<1} To Configure a Modem for DSS E-mail:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# To Configure Automation Server Modems for Faxing:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

If you are running Automation Server and TeleMagic on the same workstation, they will use the same modem for faxing. If you change the information in one, it will change in the other as well.

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The Automation Server will open.

2. Click **Configure** to configure the local faxmodem(s). (TeleMagic can use up to eight locally installed faxmodems.)

   The Modem Configuration dialog box will open.

3. If you would like to have TeleMagic configure your faxmodem automatically, click **Auto Configure Faxmodems**. There will be a pause (automatic configuration can take up to five minutes to perform) while TeleMagic checks your system for faxmodems.

   When completed, any faxmodems found will be added to the `Device(s) Configured` list.

**or** If you know the COM Port to which your faxmodem is attached, click **Manually Configure Faxmodems**.

   The Configure Modem dialog box will open.

4. Select the COM Port to which the faxmodem is attached from the Configure Modem on Port: drop-down list and click **Configure**.

5. Click **OK**.

   TeleMagic will configure the faxmodem located at the selected port and list it in the Faxmodem Configuration dialog box on the `Device(s) Configured` list.

6. Repeat steps 3 through 5 for each COM Port with a faxmodem attached, and click **Exit** when done.

   You will be returned to the main TeleMagic Automation Server screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Wireless_Messaging_Modem)<<1} To

Configure a Wireless Messaging Modem:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Modem_for_E_mail)<<1} To Configure a Modem for E-mail:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Modem_for_DSS_E_mail)<<1} To Configure a Modem for DSS E-mail:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Configure a Modem for E-mail:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The Automation Server will open.

2. Click **Configure** to configure the local faxmodem(s). (TeleMagic can use up to eight locally installed faxmodems.)

   The Modem Configuration dialog box will open.

3. Click the **E-mail** tab.

   The E-mail page will open.

4. If you will be connecting through a local area network, select the `Connect through Local Area Network (LAN)` radio button and proceed to step 9.

**or** Select the `Dial-up Networking` radio button.

5. Select the connection you will be using from the `Connection Name:` drop-down list.

6. Enter the User Name recognized by your ISP in the `User Name:` field.

7. Enter the Password required by your ISP in the `Password:` field. Enter the password again in the `Verify Password:` field.

8. The `Stay idle` field indicates the time, in minutes, that the Automation server will remain connected to the Internet without any messages before logging off. Enter the time in the field, or use the spinner arrows to select the idle time.

9. Enter the SMTP server in the `SMTP Server` field. This is the server used for outgoing messages.

10. Click **OK** to save settings and exit the Modem Configuration dialog box.

**WARNING!**
Do not change the setting in the `Port:` field unless specifically instructed to do so by your network administrator or ISP representative.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Wireless_Messaging_Modem)<<1} To Configure a Wireless Messaging Modem:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Modem_for_DSS_E_mail)<<1} To Configure a Modem for DSS E-mail:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Configure a Modem for DSS E-mail:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The Automation Server will open.

2. Click **Configure** to configure the local faxmodem(s). (TeleMagic can use up to eight locally installed faxmodems.)

   The Modem Configuration dialog box will open.

3. Click the **DSS E-mail** tab.

   The DSS E-mail page will open.

4. Enter the POP3 server in the `POP3 Server:` field. This is the server used for incoming mail.

5. The `Port:` field is machine specific and should not be changed unless specifically directed by the network administrator.

6. Enter the User ID recognized by your mail service in the `User ID:` field.

7. Enter the password recognized by your mail service in the `Password:` field. Enter the password again in the `Verify Password:` field.

8 Click **OK** to save changes and exit the Modem Configuration dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Wireless_Messaging_Modem)<<1} To Configure a Wireless Messaging Modem:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SERVER_To_Configure_a_Modem_for_E_mail)<<1} To Configure a Modem for E-mail:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Setting Up an Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

To process the Automation Server, you must first establish server configuration settings. This involves creating one or more server IDs (servers), and establishing how each of these servers should process.

## To Set Up a Server:

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The Automation Server will open.

   If users have already sent faxes, e-mail, and Wireless Messages to the queue, they will be listed on this screen.

2. Click **Setup** to set up a server.

   The Automation Server Setup screen will open, displaying details about the existing server(s). (TeleMagic comes with one server defined by default.) If you have more than one server, each will be listed here.

3. Click **Add** to add a new server.

**or** **Edit** to edit the currently highlighted server.

   The Server Setup dialog box will open.

4. Enter a unique 3 character ID in the `Server ID:` field. As faxes and wireless messages in the queue are sent, you will be able to identify which server is currently processing a given fax or message by this Server ID.

5. In the `Working Directory:` field, type (or click **Browse** to locate) the name of the directory where the server's temporary working files should be stored.

   You may enter the name of an existing directory here, or that of a directory that does not yet exist, and TeleMagic will create it. We recommend that you enter a directory that will be used solely for the purpose of storing the server's temporary working files, and that it be located on a drive with plenty of disk space—especially if you are planning to fax files containing graphics.

   If the directory name you enter does not exist, as soon as you leave the `Working Directory:` field TeleMagic will ask if you want to create it. Choose **Yes**.

6. In the Processing Pause Time: field, enter the duration, in seconds, for the pause time.

7. Select the radio button for the type of pause, either Pause between each item or Pause only when idle. When Pause only when idle is selected, there will only be a pause when the entire queue has been processed. When Pause between each item is selected, there will be a pause between each item in the queue as well as a pause between processing each queue.

8. Select what the server will process. The server can process merges, transmissions, or both.

   - Merge And Transmit for this server to both merge (print) documents and send them out. (Select this option if this is to be your only server.)
   - Transmit Only for this server to only send out documents. When selected, the server will look for documents that have been merged and printed to the fax driver by a server that is set to merge documents (see Merge Only, below).
   - Merge Only for this server to open the documents to be faxed or e-mailed, complete any merge fields, and print the documents to the fax driver. (Even if there are no merge fields, the server will still need to print the document to the fax driver.)

9. In the Retry Wait Time: field, enter the number of minutes (up to 900) the server should wait between each attempt to send the same fax or message. (Consider setting this for 15 minutes.)

10. In the Local Area Code: field, enter the local area code at the location of the workstation that will be running the server.

11. In the Dial Prefix (Outside Line): field, enter any number(s) you must dial to get an outside line.

12. In the Prefix for Local Call field, enter any number that must be dialed when placing a local call that is not necessary when dialing a long distance number.

13. Mark the Modem Speaker On checkbox to hear the initialization and dialing sounds made by the faxmodem when faxes are being sent.

14. In the Long Distance: field, enter any digits that need to be added in front of a number to place a long distance call.

15. Enter any digits that must be dialed after a number in the Dialer Suffix field.

16 Click on the Fax Specific Settings tab.

The Fax Specific Settings page will open.

17. In the `Number of Retries:` field, enter the number of times (up to 9) the server should attempt to send a fax before declaring it failed.

18. In the `Local Fax ID:` field, enter a name that will readily identify the origin of your faxes to others. The Fax ID can be up to 20 characters in length, and can contain spaces and special characters. This name is mainly used as an identification tag that can be displayed by certain receiving fax machines; for instance, those with an LCD. Not all receiving fax machines have the ability to read and display this ID, but for those that can, the fax ID can be useful.

19. In the `Fax Server Operators:` field, enter the user ID of any users who will be responsible for maintaining the server when it is processing faxes. In the event of a critical error, the Fax Server Operators will be notified of the problem by e-mail. Use the drop-down list to select each user in turn. (The entries in this field must be three-character User IDs separated by a comma.)

    A default banner that includes who sent the fax, to whom it was sent, the subject, and a page count is provided. This can be edited if necessary. If you want to keep the default fax banner, proceed to step 21.

20. In the `Left Justified`, `Centered`, and `Right Justified` fields, enter the text and fields that should appear at the specified position at the top of any fax you send. Enter *text* by typing it manually; enter *fields* by choosing them from the drop-down list to the right of each field. The text will appear in the banner as entered. Data that changes from fax to fax will be merged in place of the fields.

21. Click the **E-mail Specific Settings** tab.

    The E-mail Specific Settings page will open.

22. Select what type of e-mail traffic this server processes:

    - Select `None` if this server does not process e-mail.
    - Select `Send Only` if this server only transmits e-mail.
    - Select `Receive Only` if this server only receives e-mail.
    - Select `Both` if this server receives and sends e-mail.

23. The `Retrieve Mail Every` field determines how often, in minutes, the mail service is checked for mail. Enter the desired interval in this field, or use the spinner arrows. Set this to 0 for continuous mail retrieval.

24. Select the type(s) of mail this server will receive:
    - Select `User Only` to only receive mail for users.
    - Select `DSS Only` to only receive mail for Data Synchronization Server.
    - Select `Both` to receive mail for users and for Data Synchronization Server.
25. Click **Save** to save your changes.

    You will be returned to the main Automation Server Setup screen with your new server displayed, or, if you were editing an existing server, with your changes displayed.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Creating a Fax Banner

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Creating_a_Fax_Banner_Notes)<<1}

A fax banner is a line of additional information that prints at the top of every fax. By using the **Edit Banner** option, you have control over exactly what information prints. (Only the recipient will see the banner at the top of your fax.)

## To Create a Fax Banner:

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The TeleMagic Automation Server will open.

2. At the main Automation Server screen, click **Setup**.

The Automation Server Setup screen will open, showing a list of all the servers you have set up.

3. Highlight the server whose banner you want to edit, and click **Edit**.

The Server Setup dialog box will open.

4. Click **Fax Specific Settings**.

The Fax Specific Settings page will open.

A default banner is provided. It includes the name of the sender, its recipient, and a page count. This default can be edited if necessary.

5. In the `Left Justified`, `Centered`, and `Right Justified` fields, enter the text and fields that should appear at the specified position at the top of any fax you send. Enter *text* by typing it manually; enter *fields* by choosing them from the drop-down list to the right of each field. The text will appear in the banner as entered. Data that changes from fax to fax will be merged in place of the fields.

6. Click **Save** to return to the Automation Server Setup screen.

7. Repeat steps 3 through 6 for each server requiring a banner, returning to the General Settings page to select each additional server.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1}
Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Establishing Automation Server Downtime

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

You may want to have each server go off-line at a certain time during the course of the day. This is particularly important when you run TeleMagic rebuilds, as an external rebuild cannot proceed if the Automation Server is processing. (You might also need downtime on each server for a routine backup of files.) You have the option of setting a global downtime, or setting server-specific downtimes. For example, if you are using multiple servers, you may want to set a global downtime during TeleMagic rebuilds. If you have any servers set up just to fax without merging, you may want to customize their downtime so that they continue to process at all times. (Since they do not merge, they will not be accessing TeleMagic, and consequently will not affect a rebuild.)

## To Establish a Server's Downtime:

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The TeleMagic Automation Server will open.

2. At the main Automation Server screen, click **Setup**.

   The Automation Server Setup screen will open, showing a list of all the servers you have set up.

3. To establish a global downtime, click **Downtime**. (Skip to step 5.)

**or** To create a server specific downtime, highlight the server whose downtime you want to set, and click **Edit**.

   The Automation Server Setup dialog box will open.

4. Click **Downtime**.

   The Set Server Active Time dialog box will open.

5. Using the 24-hour time standard (where noon is 12:00 and midnight is 24:00), enter the time you wish to take the server offline in the first field, and the time you wish it to come back online in the second field.

6. Mark the days that the downtime will be in effect. The server will not go offline on days that are not marked.

7. Click **OK** when finished.

   If you are setting a server specific downtime, you will be returned to the Server Setup dialog box.

8. Click **Save** to return to the Automation Server Setup screen.

9. Repeat steps 3 through 8 for each server requiring a downtime. If you do not set a specific downtime for a server, the global default will be used.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Establishing Your Word Processors for the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Establishing_Your_Word_Processors_for_the_Automation_Server_Notes)<<1}

You must tell TeleMagic where it will find each of the word processors it may need to open when sending faxes and printing documents. When setting up your word processors, you have the option of having your servers reference the same word processor setup, or you can set up each server's word processors individually. If all or most of your servers will be using word processors located in the same path, you can establish default word processor setups. You can then set up the word processors for individual servers as necessary.

## To Establish Word Processors:

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The TeleMagic Automation Server will open.

2. At the main Automation Server screen, click **Setup**.

   The Automation Server Setup screen will open, showing a list of all the servers you have set up.

3. If you want to establish global word processors, click **Word Pro**. (Skip to step 5.)

**or** Highlight the server whose word processors you want to set up and click **Edit**.

4. Click **Word Pro**.

   The Word Processor Setup dialog box will open:

5. Choose a word processor from the Word Processors list box by marking the `Active` checkbox.

**Warning!**
If you choose Word 97 and you are running the Automation Server under Windows 95 or Windows 98, you should avoid sending faxes which do not contain merge fields. If you cannot avoid sending faxes without merge fields, insure that the `Do Not Merge Any` option is selected on the Options page of the Fax dialog box when the fax is sent. Another alternative is to always include a blank field for merging, or a field that prints white so that it is not visible in the fax. If faxes without merge fields are sent using Word 97 as the word processor and either Windows 95 or Windows 98 as the operating system, an Out of Memory error or General Protection Fault will eventually be generated. This will not occur if Windows NT is used as the operating system.

6. In the `Command Line:` field, type (or use the ellipsis

button to find) the path to the word processor's executable file.

7. Click **OK** to save changes.

8. If you are setting up word processors for an individual server, click **Save**.

   You will be returned to the main Automation Server Setup screen.

9. Click **Close** when all word processors have been set up.

   When TeleMagic is required to access a word processor to send a fax or print, it will search first for the server-specific word processor. If it does not locate it, it will use the global settings.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Setting The Automation Server Password

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Setting_The_Automation_Server_Password_Note)<<1}

To avoid unauthorized access to the Automation Server (TMAUTSRV.EXE), you may want to establish passwords for your Server. There are two types of Server passwords: a Master password and an Options password. When you first access the Automation Server and are prompted for a password, if you enter the Options password at the prompt, anyone who later tries to access any of the other Automation Server screens will again be prompted for the password. If you enter the Master password, you (and any other users) will have complete access to all areas of the Automation Server during that work session without being prompted for a password again.

## To Establish the Automation Server's Password(s):

1. On a computer where you have installed and tested a faxmodem, double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The TeleMagic Automation Server will open.

2. At the main Automation Server screen, click **Setup**.

   The Automation Server Setup screen will open, showing a list of all the servers you have set up.

3. Click **Password**.

   The Password Setup dialog box will open.

4. Click **Master Password** or **Options Password**.

   Either the Master Password or Options Password dialog box will open. (These dialog boxes appear exactly the same except for the name in the title bar.)

5. Enter the new password, retype it in the `Confirm New Password:` field, then click **OK**.

6. If necessary, repeat steps 4 and 5 for the other password type, making sure the passwords are different.

7. Click **Exit** at the Password Setup dialog box.

   You will be returned to the Automation Server Setup screen. Your server is now completely set up and ready to use.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server

Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1}
Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Choosing a Server and Processing a Queue

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Choosing_a_Server_and_Processing_a_Queue_Hint)<<1}

A queue is a holding place for faxes and wireless messages that are going to be processed by a server. You view the contents of a queue by running the TeleMagic Automation Server program (TMAUTSRV.EXE). The queue lists faxes, e-mail, and wireless messages in the order in which it receives them, and shows details about each item. For example, it shows when the fax or message was added to the queue, the item’s status, when the server processed (i.e., tried to send) it, which server processed it, and whether the item was sent successfully or not. It is possible to have up to ten separate queues, one of which can be devoted to storing information concerning all faxes sent by users locally, (this option does not apply to wireless messages), and another that can be devoted to printing word processing documents. If you have multiple servers, you can have each server processing a separate queue, or have more than one server processing the same queue. (Adding queues is discussed in the Setting Up a Queue on the Automation Server topic.)

When you launch TMAUTSRV.EXE, you can either have it automatically open a particular server and queue, or you can select the server and queue that you want to use manually. If you are running TMAUTSRV.EXE on multiple workstations, each workstation must use a different server (you may have an unlimited number), but the same queue may be open on as many workstations as you like. The multiple server system allows you the freedom of having multiple computers (each with up to eight faxmodems) processing the same queue at the same time, or each processing different queues.

You have the choice of opening the Automation Server program and selecting a server and queue each time, or launching the TMAUTSRV.EXE with a server and queue already selected using Command Line Parameters.

To Open TMAUTSRV.EXE and Choose a Server and Queue:
To Select a Server and Queue Using Command Line Parameters:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Process_a_Queue)<<1} To Process a Queue:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Monitoring_a_Queue)<<1} Monitoring an Automation Server Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Open TMAUTSRV.EXE and Choose a Server and Queue:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

2. At the main Automation Server screen, click **Setup**.

   The Automation Server Setup screen will open, showing a list of all the servers you have set up.

3. Highlight the server you want to use and click **Select**.

   You will be returned to the main Automation Server screen, and the **Monitor** button will be replaced by a **Process** button. The selected Server ID will be displayed in the upper left-hand corner of the screen. The queue that was last used with the selected server will be opened by default.

4. To choose a queue, select **Queue**.

   The Queue Edit dialog box will open.

5. At the Queue Edit dialog box, highlight the queue you want to use and click **Select**.

   The selected queue will be displayed in the upper left-hand corner of the screen.

6. Refer to To Process a Queue: for instructions on launching process mode.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_To_Select_a_Server_and_Queue_Using_Command_Line_Parameters)<<1} To Select a Server and Queue Using Command Line Parameters:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

## To Select a Server and Queue Using Command Line Parameters:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_To_Select_a_Server_and_Queue_Using_Command_Line_Parameters_Note)<<1}

1. From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory.
2. After TMAUTSRV.EXE, type a space, then /**S=** and the Server ID of the server you want to use.
3. After the Server ID, type a space, then /**Q=** and the number (1 through 10) of the queue you want to use.

   **Example:** F:\TM4\PROGRAMS\TMAUTSRV.EXE /S=FX1 /Q=2
4. Click **OK**.

   The Automation Server will open to the selected server and queue.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Open_TMAUTSRV_EXE_and_Choose_a_Server_and_Queue)<<1} To Open TMAUTSRV.EXE and Choose a Server and Queue:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Process_a_Queue)<<1} To Process a Queue:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Process an Automation Server Queue:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. Start the TeleMagic Automation Server and select a server using one of the methods outlined under To Open TMAUTSRV.EXE and Choose a Server and Queue or To Select a Server and Queue Using Command Line Parameters. .

   The main Automation Server screen will display the selected server and the current queue in the top left-hand corner.

2. To begin merging and/or sending the faxes, e-mail, and wireless messages in the queue, click **Process**.

**or** If you have selected a Print Queue, select **Print**. (**Print** replaces the **Process** button when a Print Queue is selected.)

**WARNING!**
Make sure you are launching the executable file from the TeleMagic \PROGRAMS directory. You will not be able to run TMAUTSRV.EXE from a node directory.


**Server and Queue Indicator**
**(In this case, the server ID is FX1, and the selected queue is TeleMagic Fax Q.)**

- The Automation Server Processing screen will open.

  You may leave this screen open for as long as you want to continue processing. This screen will refresh on a regular basis as items are processed, based on your `Processing Pause Time:` setting in the Automation Server Setup screen. (See the Setting Up a Server topic.)

  Word processing documents sent to the Print Queue will be processed in the order in which they are received. Faxes will be processed first in order of priority, and then in the order the items are received within each priority. wireless messages will be processed in the order in which they are received unless there are multiple messages going to the same number. When TeleMagic dials the number for a wireless message, it will search the queue to determine if there are any other messages going to that number. If there are, they will all be sent at the same time.

- Most of the information displayed on this screen is taken from the fax or wireless message itself; other information relates to how the item is processed:

- The `Status` field indicates the status of the fax, e-mail, document, or wireless message:
- Items that have not yet been attempted and are ready to be sent will have the status `Queued`.
- Faxes and messages that have been successfully sent will have the status `Sent`.
- Documents that have been successfully printed will have the status `Printed`.
- The item currently being processed will have the status `Active`.
- If the fax or message has already been unsuccessfully transmitted, the transmission will be attempted again the number of times specified in Server Setup for faxes, or Wireless Messaging preferences. The status will read `Retry1`, `Retry2,` etc.
- Items which were transmitted unsuccessfully the specified number of times will have the status `Failed`.
- Faxes which have been put on hold will have the status `Hold`.
- The status `Done` relates to the master fax in a set of filtered faxes. When you send a fax to every contact in a filter, you will see a "placeholder" name in the queue that represents the master fax. When the queue is processed, this placeholder expands to include each contact in the filter. The status `Done` indicates that the filter has been expanded. (This does not apply to wireless messages or documents.)
- The `By` field displays the ID of the server that processed the fax or message. If you have more than one server processing the same queue, this field will indicate which server processed an individual item.
- The `Port` field indicates from which COM Port the fax or message was sent.
- The `From` field is the User ID of the user who queued the item.
- The `To` field displays the name of the individual receiving the fax or message or the contact for whom the document is being printed.
- The `Subject` field will display the subject if it is a fax or e-mail message, the document name if it is a document, or `Wireless Message` if it is a wireless message.
- The `Error` field will give you an explanation if the item could not be processed. Refer to Automation Server Troubleshooting for a list of possible error messages and their meanings.

The bottom of the screen gives information concerning the status of faxmodem(s) on your current workstation. The port to which the faxmodem(s) are connected will also be shown here. (Using this information in conjunction with the `Port` column lets you know the sending status of each fax.)

The bottom of the screen also includes a line displaying the memory status of the workstation on which you are running the Automation Server. The memory status will display the percentage of the system resources you have available and the amount of memory in megabytes you have available. It will also display the threshold for each. The threshold gives you a reference point when monitoring your memory and resources. The memory and resources should not be allowed to fall below this threshold. The threshold will default to 10% resources and 5 MB of memory. (If you want to specify a different threshold, you may do so using Command Line Parameters. See Automation Server Parameters for details.) If your system falls below this threshold, the Automation Server will complete the currently active item(s), then automatically restart Windows. (To resume processing automatically when Windows restarts, place the Automation Server icon in your StartUp Program Group and use parameters to re-open your server and queue in Process mode.) This will avoid any possible problems resulting from continuing to run the Automation Server on a workstation whose memory or resources have fallen below the recommended threshold.

If the Memory Status display is red, you are dangerously low on memory and/or resources; if it is yellow, you should monitor your memory and resources carefully; if it is green, you do not have an immediate memory or resource problem. If you do encounter a problem, close any unnecessary applications. If the problem continues, consider running the Automation Server on a workstation with greater resources and/or memory.

3. When you are finished processing faxes and messages (or documents), press ESC. (If the server is in the middle of processing a fax or wireless message when you press ESC, a message will inform you that the server will stop after the current item is finished.)

   If you want to delete, change, or requeue an item, see Maintaining Queues.

   If you want to rebuild fax, document, and messaging files, see Rebuilding Server Files.

   If you want to close the Automation Server, click **Exit**.

   If you want, in the future, to be able to open the Automation Server directly in process mode, and otherwise automate the running of the Automation

Server, see the Automation Server Parameters topic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Monitoring_a_Queue)<<1} Monitoring a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Monitoring an Automation Server Queue

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

You can watch what is happening to faxes, documents, and wireless messages in a particular queue without physically going to the machine(s) where that queue is being processed.

## To Go into Monitor Mode:

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open. The button at the bottom-left corner of the screen should read **Monitor**.

2. Click **Queue** and select the queue you want to monitor.

3. Click **Monitor**.

Monitor mode will open, showing the progress of faxes and messages in the selected queue. The queue name is indicated in the top left-hand corner.

The status of items on the Automation Server Screen can be determined by the color of each line:

- Red Failed
- Green Processed Successfully
- Yellow Active
- White Queued or Merged

Note that when an item is selected, it will be displayed in inverse color. If you see an item on the screen with a color other than one of those listed, select another item to see the actual color.

4. When you are finished looking at the queue, press ESC to exit Monitor mode.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Maintaining_Queues)<<1} Maintaining Queues

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Maintaining Automation Server Queues

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Maintaining_Automation_Server_Queues_Note)<<1}

From time to time you may want to clean up your queue by deleting, requeuing, or even changing the details of faxes and messages that have not been sent. All of these tasks can be dealt with through the Automation Server program's Maintenance option.

Finding a Specific Fax or Message in Maintenance Mode
Tagging Faxes and Wireless Messages in Maintenance Mode
Requeuing Faxes and Wireless Messages
Printing Faxes
Deleting Faxes and Wireless Messages
Viewing and Changing Fax and Wireless Message Information
Rebuilding Server Files

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Finding a Specific Fax or Message in Maintenance Mode on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

Many of the maintenance procedures you may need to perform involve going to a specific fax or message in maintenance mode. This topic describes use of the VCR buttons and the Goto feature, which is particularly helpful for very full queues. The VCR buttons allow you to scroll quickly through items in your queue. Goto allows you to sort your records by date, user, and/or status, and takes you to the first fax for a specified date, user, and/or status.

The status of items on the Automation Server Screen can be determined by the color of each line:

- Red Failed
- Green Processed Successfully
- Yellow Active
- White Queued or Merged (Process not yet attempted)

Note that when an item is selected, it will be displayed in inverse color. If you see an item on the screen with a color other than one of those listed, select another item to see the actual color.

## To Find a Fax in Maintenance Mode

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open.

2. Select the appropriate queue as detailed in the To Open TMAUTSRV.EXE and Choose a Server and Queue topic.

3. At the Main Automation Server screen, click **Maintenance**.

   The TeleMagic Automation Server Maintenance screen will open.

4. Scroll through the items in the queue using the ARROW KEYS.

5. Click **Goto**.

   The Goto dialog box will open.

6. If you are looking for a fax or wireless message sent on a specific date, mark the `Date` check box, and enter the date in the date field.

7. If you are looking for a fax or wireless message sent by a specific user, mark the `User` check box, and choose the User ID from the drop-down list.

8. If you are looking for a fax or wireless message with a specific status, mark the `Status` check box, and choose a status from the drop-down list.

9. Click **OK**.

   You will be returned to the Maintenance screen, where the faxes and messages will be ordered according to the criteria you selected in steps 6 through 8. The first appropriate fax or message in the list will be highlighted. (If you chose more than one option, the items will be sorted by date, then user, then status.)

10. Once you have located the fax or message you were looking for, you may:

    - Tag it, following the steps in Tagging Faxes and Wireless Messages in Maintenance Mode;
    - Requeue it, following the steps in Requeuing Faxes and Wireless Messages;
    - Delete it, following the steps in Deleting Faxes and Wireless Messages;
    - Print it, following the steps in Printing Faxes;
    - Edit it, or view its details, by following the steps in Viewing and Changing Fax and Wireless Message Information.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Tagging Faxes and Wireless Messages in Maintenance Mode on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

Once you have found a specific group of faxes and messages, and if you want to work with that group, you will need to tag items. These steps explain how to tag and untag individual items, how to tag groups of items, and how to clear all tags.

## To Use Tags in Maintenance Mode:

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

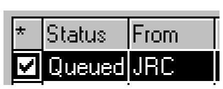
**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open.

2. Select the appropriate queue as detailed in the To Open TMAUTSRV.EXE and Choose a Server and Queue topic.

3. At the Main Automation Server screen, click **Maintenance**.

The TeleMagic Automation Server Maintenance screen will open. Note that in the Maintenance screen, a double-arrow (>>) in the `*` column of a listed fax means that it has already been tagged:




**Tagged Fax**

4. To tag a single fax, highlight it and click **Tag** or the checkbox next to the fax, or press T. (If the fax is already tagged, this will clear the tag.)

5. If you need to deal with more than one or two faxes, or if there are many faxes in the current queue, click **Tag Opts**.

The Tag Options dialog box will open.

- To tag all faxes and messages, choose the `Tag All` radio button.
- To tag all faxes and messages with a certain status (for example, all `Failed`), choose the `Tag All Status` radio button and choose a status from the drop-down list.
- To tag all faxes and messages that were queued

by a particular user, choose the `Tag All User` radio button and choose the user from the drop-down list.

- To tag all faxes and messages that were queued on a particular date, choose the `Tag All Date` radio button and choose the date from the drop-down list.
- To clear all existing tags, choose the `Clear Tags` radio button.

6. After making the choices you want, click **OK**.

7. When you have tagged the fax(es) and messages you want to work with, you can

- Requeue them following the steps in Requeuing Faxes and Wireless Messages.
- Delete them following the steps in Deleting Faxes and Wireless Messages.
- Print them following the steps in Printing Faxes.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Requeuing Faxes and Wireless Messages on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

Requeuing faxes and wireless messages means changing the item’s status back to `Queued`. For example, you might need to requeue a message that currently has the status `Failed`, or a fax whose details you have changed (see the Viewing and Changing Fax and Wireless Message Information, topic).

## To Requeue Faxes and Wireless Messages:

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open.

2. Select the appropriate queue as detailed in To Open TMAUTSRV.EXE and Choose a Server and Queue.

3. At the main Automation Server screen, click **Maintenance**.

The TeleMagic Automation Server Maintenance screen will open.

4. If you want to requeue a single item, highlight it on the list.

If you want to requeue a group of items, tag the item(s) you want to requeue. (A double-arrow **>>** will appear to the left of all tagged items.)

5. Click **Requeue**.

The Requeue Entries dialog box will appear.

6. Click **Tagged** to requeue all tagged items.

**or** Click **Highlighted** to requeue the currently highlighted item only.

The item(s) will be requeued.

7. Click **Close** to exit the Maintenance screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Printing Faxes From the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_Printing_Faxes_From_the_Automation_Server_Note)<<1}

Occasionally you may want to see a printout of a fax, either to see its full (merged) contents, or to have a printed copy for your records. TeleMagic allows you to send any queued fax to a printer with just a few mouse clicks.

## To Print a Fax from the Queue:

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open.

2. Select the appropriate queue as detailed in the To Open TMAUTSRV.EXE and Choose a Server and Queue topic.

3. At the Main Automation Server screen, click **Maintenance**.

The TeleMagic Automation Server Maintenance screen will open.

4. If you want to print a single item, highlight it on the list.

**or** If you want to print a group of items, tag the item(s) you want to print. (A checkmark will appear to the left of all tagged items.)

5. Click **Print**.

The Print Faxes dialog box will appear.

6. If you want to print all tagged items, click the **Tagged** button.

**or** If you want to print the currently highlighted item, click **Highlighted**.

The item(s) will be printed. A Document Print Completed message will appear when the item(s) have been sent to the printer.

7. Click **OK** to close the Document Print Completed message box.

8. Click **Close** to exit the Maintenance screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1}
Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}
Automation Server Troubleshooting

# Deleting Faxes and Wireless Messages on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

Running a rebuild on your Automation Server (see the Rebuilding Server Files, topic) will automatically delete sent faxes and messages. However, if you want to delete specific faxes, such as those that have failed or that have not yet been sent, you can delete them in Maintenance mode.

## To Delete Faxes and Wireless Messages from a Queue:

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

The main Automation Server screen will open.

2. Select the appropriate queue as detailed in the To Open TMAUTSRV.EXE and Choose a Server and Queue topic.

3. At the Main Automation Server screen, click **Maintenance**.

The TeleMagic Automation Server Maintenance screen will open.

4. If you want to delete a single item, highlight it on the list.

**or** If you want to delete a group of items, tag the item(s) you want to delete. (A checkmark will appear to the left of all tagged items.)

5. Click **Delete**.

The Delete Faxes dialog box will appear.

6. If you want to delete the currently highlighted item, click **Highlighted**.

**or** If you want to delete all tagged items, click **Tagged**.

The item(s) will be deleted.

7. Click **Close** to exit the Maintenance screen.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1}

Automation Server Troubleshooting

# Viewing and Changing Fax and Wireless Message Information on the Automation Server

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

If a fax or wireless message has not yet been sent, you can change details of the item from the Automation Server.

To View/Change the Details of a Wireless Message:
To View/Change the Details of a Fax:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

## To View/Change the Details of a Wireless Message on the Automation Server:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The main Automation Server screen will open.

2. Select the appropriate queue as detailed in the To Open TMAUTSRV.EXE and Choose a Server and Queue topic.

3. At the Main Automation Server screen, click **Maintenance**.

   The TeleMagic Automation Server Maintenance screen will open.

4. Highlight the wireless message you want to view or change. (wireless messages will say `Wireless Message` in the `Subject` field.)

5. Click **Edit**.

   The Wireless Messaging Edit dialog box will open.

6. To edit the contents of the message, place your cursor in the edit region and begin typing.

7. If you want to edit the pager number or pager ID, you may do so in the `Pager #:` and `Pager ID:` fields.

8. Click **Options** to open the Wireless Messaging Options dialog box.

9. If you want to change your e-mail notification settings, you may do so using the following guidelines:

   - Select `E-mail On: Completion` if you want to receive e-mail notification if the message sends successfully. Leave it empty if you do not.
   - Select `E-mail On: Failure` if you want to be notified if the message does not send successfully. Leave it empty if you do not.

10. If you want to adjust the baud rate, you can use the `Baud Rate:` drop-down list.

**WARNING!**

The baud rate selected here should be the rate that can be accommodated by the paging carrier, not the baud rate that can be handled by the sending modem. Do not adjust this setting unless you know that the paging carrier can accommodate a higher baud rate.

11. To adjust the number of times a message should be retried before receiving a `Failed` status, enter the number in the `Number Of Retries:` field.

12. To adjust the maximum packet size, enter the new size in the `Packet Size:` field.

**WARNING!**
If you enter a packet size that is higher than can be accommodated by the paging carrier, part of the message may be cut off.

13. Click **OK** to save your settings.

    You will be returned to the Wireless Messaging dialog box.

14. Click **Save** to save your edits and return to the Maintenance screen.

15. Click **Close** to exit the Maintenance screen.

16. Click **Exit** when you are finished with the Automation Server.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_View_Change_the_Details_of_a_Fax)<<1} To View/Change the Details of a Fax:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To View/Change the Details of a Fax on the Automation Server:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** From the taskbar, choose **Start**, **Run**. Enter the path to the file TMAUTSRV.EXE in the TeleMagic \PROGRAMS directory and click **OK**.

   The main Automation Server screen will open.

2. Select the appropriate queue as detailed in the To Open TMAUTSRV.EXE and Choose a Server and Queue topic.

3. At the Main Automation Server screen, click **Maintenance**.

   The TeleMagic Automation Server Maintenance screen will open.

4. Highlight the fax you want to change.

5. Click **Edit**.

   The Edit Fax dialog box will open.

6. To change the name of the sending party, edit the contents of the `From:` field. (The contents of this field will be merged into the `Fax From:` merge field if it is used in any of the documents being faxed.)

7. To change the name of the recipient of the fax, edit the contents of the `To:` field.

8. To change the number to which the fax is sent, edit the contents of the `Fax #:` field.

9. To change the subject of the fax, edit the contents of the `Subject:` field. (The subject will be merged into the `Fax Subject:` merge field if it is included in any of the documents being faxed.)

10. To change the cover document being faxed, enter a new document name and path in the **Cover** field.

**or** Click on the **Cover** button and browse for the new cover document using the Open dialog box.

11. Use the `Documents:` fields if you want to add or remove any of the documents being included in the fax.

12. If you want to move the fax to a different queue, select the desired queue from the `Queue:` drop-down list.

13. Click **Comment** to edit any cover comments you have created for this fax. (The comments will be merged into

the `Fax Notes:` merge field if it is included in any of the documents being faxed.)

14. Click **Options** to access the Fax Options dialog box.

15. To place the fax on hold, enter the date and time that you want the fax to be sent in the `Date:` and `Time:` fields.

16. To adjust the sending priority of the fax, select the appropriate priority from the `Priority:` drop-down list.

17. Edit the check boxes using the following guidelines:

    - Select `Email Notify` to receive notification when the fax is sent successfully.
    - Select `Email On Failure` to receive notification if the fax does not send successfully.
    - Select `Activity Create` if you want TeleMagic to create an activity with the type `LetterFax` and the status `Completed` in your calendar in the Activity Manager.
    - If the documents you are faxing use merge fields with the level number first and then the field name, make sure the `Backward Compatible` check box is selected. (This was the format for merge fields used with TeleMagic Enterprise V1.5, and earlier.)
    - Select `Fail On Invalid Fields` if you want the fax to be assigned a `Failed` status if there are invalid merge fields in the documents being faxed. If this is not marked, the fax will proceed with no information in the invalid fields. (This option is based on your Fax preferences.)
    - Select `Notepad Stamp` if you want the contact's notepad (based on your Notepad Key Field) stamped with details concerning the fax.
    - Select `Stamp Documents` and /or `Stamp Comments` if you want the list of documents and/or cover comments being faxed stamped into the contact's notepad, the Fax Stamp Key Field, and/or the `Comments` field of any associated activity.
    - If there are merge fields in all of the documents being faxed, select `Merge All Documents`. If there are merge fields in the cover document only, select `Merge Cover Only`. If there are no merge fields anywhere in the fax, select `Do Not Merge Any`. (Selecting `Merge Cover Only` or `Do Not Merge Any` will expedite processing. You should only select these options if you are certain that there are no merge fields in the document.)

18. Click **OK** to save the Fax Options settings.

19. Click **Detail** to view a Fax Detail screen with full details about the selected fax.

20. Click **OK** to close the Fax Detail dialog box.

    You will return to the Edit Fax dialog box.

21. To edit the list of custom reports that are being included with the fax, click **Reports**.

    The Select Custom Reports to Fax dialog box will open.

22. If you want to include any additional reports, select them in the `Available Reports` list and click **Add**. If you want to remove a report currently being included, highlight it in the `Selected Reports` list and click **Remove**.

23. Click **OK** to save your selections.

    You will return to the Edit Fax dialog box.

24. Click **OK** when you are finished with the Edit Fax dialog box.

25. Click **Close** to exit the Maintenance screen.

26. Click **Exit** when you are finished with the Automation Server.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_View_Change_the_Details_of_a_Wireless_Message)<<1} To View/Change the Details of a Wireless Message:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Rebuilding Automation Server Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

Server files are rebuilt separately from other files in your system. Running a rebuild on the Automation Server will rebuild the server files and re-index the queue(s), removing all sent faxes and wireless messages from selected queues to an archive file. (Failed faxes and messages must be deleted by hand.) You may run a user-defined rebuild by accessing the rebuild feature in the Automation Server screen in TeleMagic; you can also run a default, all-queues rebuild without TeleMagic running, by running the Automation Server's executable file with a command line parameter (see the Automation Server Parameters topic for details on all of the available command line parameters).

To Rebuild the Automation Server Internally:
To Rebuild the Automation Server Externally:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# Rebuilding the Automation Server Internally:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1}

## To Rebuild the Automation Server:

1. Double-click the Automation Server icon in the TeleMagic program group or folder.

**or** Open the Run dialog box (from the taskbar in Windows 95, choose **Start**, **Run**) enter the path to the file TMAUTSRV.EXE in the TeleMagic programs directory (\TM4\PROGRAMS by default), and click **OK**.

The main Automation Server screen will open.

2. Click **Rebuild**.

The Choose Rebuild Options dialog box will open, showing a list of all your queues.

3. Select the queues you want to rebuild:

- Choose the `Ignore` radio button for queues you do not want to rebuild.
- Choose the `Rebuild` radio button for queues on which you want to run a rebuild that only re-indexes, and that does not archive sent faxes and messages.
- Choose the `Archive` radio button if you want to rebuild a queue and archive all sent faxes and messages. (Items will be archived to a file called TMFAXARC.* in the TMFAX directory off the TeleMagic global directory path, where TeleMagic is installed.)
- Choose the `Clear` radio button if you want to perform a rebuild that deletes *all* faxes and messages in the specified queue.

4. If you chose the `Archive` radio button for any queue(s) in step 4, the `Overwrite Archive File?` check box will become available. Mark it if you want to overwrite any existing archive file with the file generated by this rebuild; leave it alone it if you want to append the current rebuild's output to the existing archive file.

When you include external documents in your faxes, the printed documents are stored in a file that the Automation Server accesses when sending the fax. If you delete or archive the related faxes, you should periodically purge the associated external document files. (This will not remove any external documents if the related fax still exists in the queue.)

5. If you want to delete any external documents that were attached to faxes that have been deleted, mark `Purge Processed External Docs?`. Leave it blank if you do not want to delete these items.

6. When finished choosing options, click **OK**.

   The rebuild will commence. Several `Rebuilding Fax Files` messages will appear in the top right-hand corner of your screen, followed by a `Rebuild Complete` message.

7. Click **Exit** to exit the Automation Server.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Rebuild_the_Automation_Server_Externally)<<1} To Rebuild the Automation Server Externally:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

# To Rebuild the Automation Server Externally (with TeleMagic not running):

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Automation Serverï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½serverx_To_Rebuild_the_Automation_Server_Externally_Note)<<1}

1. Go to a workstation that has access to the TeleMagic global directory (the directory containing all of TeleMagic's files).

2. From the taskbar in Windows 95, choose **Start**, **Run**.

   The Run dialog box will open.

3. In the `Open:` field in Windows 95, type the path to the file TMAUTSRV.EXE in the TeleMagic programs directory (\TM4\PROGRAMS by default).

4. After the letters EXE, type a space and the parameter ***/R***.

   **Example:** C:\TM4\PROGRAMS\TMAUTSRV.EXE /R

5. If your Automation Server is password protected, add a space and the parameter ***/PW=*** followed immediately by your Master password.

   For a Automation Server whose Master password is SESAME, the command line will look similar to this:

   **C:\TM4\PROGRAMS\TMAUTSRV.EXE /R /PW=SESAME**

6. Click **OK**.

   The rebuild will proceed. All queues will be rebuilt. Sent faxes and messages will be removed from the queues and appended to the existing archive file, if there is one. (The archive file is called TMFAXARC.* and is stored in the TMFAX directory.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_To_Rebuild_the_Automation_Server_Internally)<<1} To Rebuild the Automation Server Internally:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Automation_Server_Setup)<<1} Automation Server Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SERVER_Choosing_a_Server_and_Processing_a_Queue)<<1} Choosing a Server and Processing a Queue

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

## Note for The TeleMagic Automation Server

The Automation Server can also be used to print documents created in word processing. The only setup requirement for this is that the workstation running the server have a default printer set up in Windows, and that you have not deleted the queue named Print Queue (provided by default).

## Note for the Server Pre-Setup Checklist

Wireless Messaging requires a dedicated faxmodem.

## Hint for What You Need To Know Before Setting Up the Server

A server dedicated only to merging documents can be run from any workstation that has access to them—it does not necessarily need to have a faxmodem installed.

## Hint for Step 9

If you want to determine what class of faxmodem you have installed, enter **AT+FCLASS=?**. Terminal will return one or more numbers, separated by commas. (**Example:** 0,1) If 1, 2, or 2.0 are included in the return, you will be able to use the installed faxmodem with TeleMagic.

## Note for Step 1

If you are prompted for a password before the main screen opens, or at any stage during the setup process, that means another user has already entered the Setup part of the Automation Server program and password-protected it. See your System Administrator for details.

## Note for Step 4

If you select a queue that currently has a name, then you delete the name from the `Queue Name:` field, and click **Save** at that point, you are effectively de-activating the queue. This will not *delete* faxes, e-mail, and wireless messages already in the queue, but they will remain inaccessible until you give the queue a name again. You may deactivate all but two of your queues: Queue #1 and Queue #10 must always be the two working queues available.

## Hint for Step 4

Any queue with a name beginning ‘Print Queue’ (e.g., print queue 1) can be used to print word processing documents from the Automation Server. See the Starting a Mail Merge Using TM-Merge topic in on-line help for more information on queuing word processing documents.

## Note for Configuring Modems on the Automation Server

If you are going to be processing faxes, e-mail, and Wireless Messages on the same machine, you must have at least three modems installed, unless you are transferring e-mail via local area network. If you are using a local area network to transfer e-mail, you would only need two modems; one for Wireless Messaging and one for faxing. Each of these features requires a dedicated modem, except e-mail which can use a LAN connection instead.

## Note for Step 6

If you later decide you do not want to devote a modem to Wireless Messaging, access this dialog box and select `Disable Wireless Messaging` from the `Modem Type` list. This will make the modem available for faxing.

## Note for Step 4

You will not be able to select a port that has been configured for use with Wireless Messaging. If you have only one faxmodem and the port to which it is attached has been reserved for use with Wireless Messaging, you will not be able to access the Add Faxmodem dialog box. If you want to configure a modem for faxing that is currently in use with Wireless Messaging, you must first disable the Wireless Messaging feature. See the note following step 6 under To Configure a Modem for Wireless Messaging.

## Note for Step 4

If you select a COM Port with no faxmodem attached, you will receive an `Unable to Add Device` message.

## Note for Step 5

You must have at least one modem established in Windows for any connections to be available.

## Note for Step 1

If you are prompted for a password before the main screen opens, or at any stage during the setup process, another user has already entered the Setup part of the Automation Server program and password-protected it. Contact your system administrator for details.

## Hint for Step 8

Dividing the tasks of merging and printing the documents and actually sending the documents between different servers can dramatically increase processing speed. You can devote the workstation that has installed faxmodems to solely sending out the documents, while one or more other workstations do the time-consuming work of printing the documents to the fax driver.

## Note for Transmit Only

If you will not have a server devoted to merging documents, do not select this option. Do not select this option if the server will be used to process the Print Queue.

## Note for Merge Only

You can select this option if you have another server set up to either `Transmit Only` or `Merge And Fax`. (If your other server is set to `Merge And Fax`, when the Automation server encounters a fax or e-mail in the queue that has not been merged, it will merge the document, print it to the fax driver, and send the fax or e-mail. When it encounters a document that has already been merged and printed by the Merge Only server, it will simply send the fax or e-mail.) Do not select `Merge Only` if this is to be your only server, or faxes and e-mail will not be sent.

## Note for Step 10

This field (and the remaining fields in the `General Server Settings` portion of the screen) does not read and display the settings you entered in the Dialer and Fax preferences screens within TeleMagic. What you are entering here are the settings that the *server* should use when processing faxes; what you enter in Dialer and Fax preferences are the settings that apply to any faxes sent locally (not by way of the queue). The two sets of information are not related, even though they may look similar. (If you have set up NANP, the server will respect these settings.)

## Note for step 12

If you have placed a number in the `Dial Prefix (Outside Line)` field, it is not necessary to place it here as well. (If you do, it will be dialed twice.) This field should only contain any necessary local prefix.

## Note for Step 17

The number of retries for wireless messages is defined when the messages are created.

## Notes for Step 19

It is not recommended that you select users who have turned off e-mail notification in E-mail preferences, or users who are using an external e-mail application in place of TeleMagic's internal e-mail.

The **Edit Banner** button is discussed under the topic Creating a Fax Banner. The **Downtime** button is discussed under the topic Establishing Server Downtime. The **Word Pro** button is discussed under the topic Establishing Your Word Processors

## Note for Fax Banner

The Fax Banner only applies to faxing. It will have no impact on Wireless Messages and e-mail sent through the server. If you choose not to edit the banner, the default banner will print. The default banner includes From, To, Subject, Current Page, and Total Pages.

## Note for Step 20

The fax banner you create for your first server (the topmost server listed in the Automation Server Setup dialog box) will also be used for any faxes sent locally, that is, those not sent via the fax queue.

## Notes for Step 25

If you need to edit any of the existing servers, click **Edit** and follow the instructions used in adding a server to make any necessary changes.

To delete a server, highlight it and click **Delete**. TeleMagic will not allow you to delete your only server. You must have at least one server set up.

## Note for Step 6

The fax banner you create for your first server (the topmost server listed in the Automation Server Setup dialog box) will also be used for any faxes sent locally, that is, those not sent by way of the queue.

## Hint for Step 5

If you leave 00:00 in both fields, the server will not go off-line.

# Notes for Establishing Your Word Processors for the Automation Server

Word Processor setup only applies to faxing and printing. It will have no impact on wireless messages sent through the server.

If you will be using Word for Windows 7, turn off automatic spell checking and background printing on any installations of that word processor that you are establishing for use with the Automation Server.

## Note for Step 5

You can select as many word processors as you require. The correct word processor will be selected for each document to be faxed or printed. If you no longer use a word processor that has been previously activated, clear the `Active` checkbox.

## Notes for Step 6

If multiple servers will be sharing the same word processor setup, you should make sure that the users logged into the workstations used to print and process faxes have the same drive mapping, and the same word processor.EXE file access.

WordPad is launched from a file called WRITE.EXE located in the C:\WINDOWS directory. Although this file has the same name as the executable for the Write word processor, it is actually only used to point to the WordPad word processor. If you select the Write option from the list of word processors, make sure that the 5 KB WRITE.EXE file exists in the specified path for any installations of Windows 95 that will be running the Automation Server. (The WRITE.EXE file that launches Write can be identified by its size. The WRITE.EXE that actually launches the Windows Write word processor is approximately 2.5 MB.)

## Note for Step 7

If you no longer use a word processor that has been previously activated, clear the `Active` check box.

## Note for Setting The Automation Server Password

Automation Server passwords can also be set from the TeleMagic Preferences screen. For instruction on accessing this feature, see System Preferences

## Hint for Choosing a Server and Processing a Queue

If you have set up one server to merge only and one to fax only, make sure that both servers are pointing to the same queue.

## Notes for Step 3

Always select your server before you select your queue. If you select the queue first, as soon as you select a server, it will be changed back to the queue that was last used with that server.

If you try to access a server that is already selected at another work station, you will not be warned that the server is in use. You will be returned to the main Automation Server screen, but the **Monitor** button will not change to **Process**.

## Notes for Step 4

For information on establishing your queues, see Setting Up a Queue.

If you are using multiple fax servers, it is possible to have more than one server connected to and processing the same queue simultaneously.

## Note for Select a Server and Queue Using Command Line Parameters

For more information on Command Line Parameters, see the Automation Server Parameters topic.

## Note for Step 4

You can attach these parameters to the properties of the Automation Server icon in the TeleMagic Program Group or Folder to open the specified server and queue every time you launch the program from the icon. See TeleMagic Command Line Parameters for details.

## Note for Step 2

If you have established a default server, you can automate this procedure by running the Automation Server executable with the parameter /P, which will automatically send the system into processing mode for the currently selected queue. For details, see Automation Server Parameters.

## Additional Note for Step 2

If it seems that many more faxes appear in the processing list than were originally visible in the queue, this is because some faxes in the queue represent a fax sent to a filtered group of contacts. Once you open the processing screen, the list expands to show each individual fax that was sent as part of that filter.

## Hint for Step 2

This information is useful in troubleshooting. If you are having problems with a percentage of your faxes, one of the first things to check is if they are consistently failing from the same port. If this is the case, you may want to check the modem installed at that port. (You may only devote one modem to Wireless Messaging, so those messages will always be processed from the same COM Port.)

## Note for Step 1

If it reads **Process**, a server has already been selected and you will not be able to go into Monitor mode directly. If you accessed the Automation Server from the icon, it is likely that you have a parameter attached to the icon. Try opening the program from the Run dialog box. (If the button reads **Print**, you have the Print Queue selected. To monitor the Print Queue, click **Print**. To monitor a fax and wireless messaging queue, see step 2.)

## Note for Maintaining Automation Server Queues

Maintaining the queue is a different process from rebuilding files. That topic is discussed in the Rebuilding Automation Server Files topic.

# Note for Printing Faxes From the Automation Server

The print option will be effective only if the workstation from which you are about to perform the following set of steps is hooked up to a printer (either directly or via a network), and the printer has been set up correctly and selected as the default printer on the workstation in question. If you have any problems printing a TeleMagic fax, try printing any simple text file from the same workstation. If you will be printing faxes, you must also have access to the word processors that were used to create the documents being faxed in the path that is given in the Edit Word Processors dialog box. (See the Establishing Your Word Processors topic.)

## Note for Step 5

Although you may view details of a fax with the status `Failed` from this dialog box, any edits you make will not be retained. You must requeue a failed fax before you can edit it.

## Note for Step 7

This information is only used in the `Fax To:` merge field if it is included in any of the documents being faxed. This will not affect the contact record to which the fax is linked.

## Note for Step 17

Activities created from a fax will be added to your calendar and will appear in browse in the Activity Manager and in Activity Reports. They will also be listed in the contact’s document history. To avoid overloading your schedule, they will not appear on the day, week, or month view of your calendar.

## Additional Note for Step 17

You should make sure the documents you select do not use a mixture of formats.

## Note for Rebuilding the Automation Server Externally

The external rebuild automatically rebuilds all queues, appending sent faxes and wireless messages to the archive file.

## Hint for Step 11

HyperTerminal will ask if you want to save the session (the session name will be the same as the descriptive connection name). If you do not want to save the session, click **No**, and HyperTerminal will exit. If you click **Yes**, HyperTerminal will save the session, then exit.

If you chose to save the session, you may access the test connection any time by selecting **Start, Programs, Accessories, HyperTerminal**, then double-clicking your test connection's icon in the HyperTerminal window. When HyperTerminal opens, your test connection is ready.

## To-Do Priority

When To-Dos are created, they can be assigned a priority. To-Dos listed on the Day at a Time page will be grouped by the priority, with Priority 1 To-Dos at the top of the list, followed by Priority 2, then Priority 3. To-Dos can be easily re-prioritized by dragging the item to the new priority.

## To-Do Page

The yellow To-Do page shows your list of things to do. Unlike TeleMagic activities, To-Dos have a due date, but no specific completion time. You can easily change the order and priority of To-Do items by simply dragging the To-Do to a new slot.

## Completion Check Boxes

It is simple to complete TeleMagic activities and To-Dos. Just click on the check box. Check boxes with a mark in them indicate a completed item. Check boxes without a mark indicate a pending item.

## Due Date Status

Exclamation points alert you when your To-Do item is due. A single exclamation point means the item is due tomorrow. Two exclamation points mean the item is due today. Three exclamation points means that the item is currently overdue.

## Left Scroll Arrow

Click on this arrow to scroll to the previous day’s calendar page.

## Right Scroll Arrow

Click on this arrow to scroll to the next day’s calendar page.

## Vertical Scroll Arrows

Scroll through your time slots by clicking on these arrows. The arrow that points up will allow you to view earlier times. The arrow that points down will allow you to view later times. When you have reached the beginning or end of the day’s times, the arrow will disappear.

## Activity Page

This page lists your TeleMagic activities. Activities are events—such as phone calls, meetings, and appointments—that are scheduled to be completed on a particular day and time. You can reschedule an item by simply dragging it to a new time slot.

## Color Coding

Your Day at a Time calendar is divided into times slots. The length of these slots is determined in Activity Preferences. If an activity is scheduled to take longer than one slot, the time span will be blocked off in colored bands for quick visual identification of the length of the activity.

## Time Slots

Activities are scheduled to be completed at a particular time and to span a particular duration. The Activity page of the calendar is broken up into time slots for your activities. You can control the length of these time slots in Activity preferences. (See the topic Show Time in Blocks Of for more information.)

## Extended Activity

Activities that span more than one day are called extended activities. These can include business trips, visitors, projects, vacations, or any activity that will be ongoing over a range of days. Extended activities are scheduled and maintained in the Month at a Time calendar view, but are displayed here. Up to three extended activities can be displayed on any one day in the Day at a Time view. (See the topic Scheduling an Extended Activity (Multi-Day Event) for more on extended activities.)

## Activity Icons

Activity icons help you quickly identify the type of certain activities. A phone indicates a Call type activity, a happy face indicates a meeting, a bell indicates an activity with an alarm attached, and a clock face indicates any other activity type.

## Horizontal Scroll Arrows

Scroll through the Week at a Time calendar by one day using the horizontal scroll arrows. Click the left arrow to scroll back a day. Use the right arrow to scroll forward a day.

## Week View Time Slots

Each day’s column in week view is divided into rows for the available time slots during the day. The list of times to the left and right of the date columns show the corresponding time for each row. The time slots displayed in Week at a Time view are of the same duration as those displayed in Day at a Time view. You can control the length of these time slots in Activity preferences. (See the topic Show Time in Blocks Of for more information.)

## Date Columns

Each day of the week is represented by a column in Week at a Time view. Scan down the column to see the day’s activities.

## Extended Activity Area

Extended activities are displayed in this area. Extended activities are activities that span more than one day. These can include business trips, visitors, projects, vacations, or any activity that will be ongoing over a range of days. Extended activities are scheduled in the Month at a Time calendar view, but are displayed here. Up to three extended activities can be displayed on any one day in the Week at a Time view. (See the topic Scheduling an Extended Activity (Multi-Day Event) for more on extended activities.)

## To-Do Area

To-Dos are displayed in the bottom portion of the weekly calendar page. (To-Do items only appear on their due date in Week at a Time view.)

## Weekly Scroll

Use these arrows to scroll through your Week at a Time calendar by week. Click the left scroll arrow to view the previous 7 days. Click the right scroll arrow to view the next 7 days.

## Extended Activities

Extended activities are activities that span more than one day. These can include business trips, visitors, projects, vacations, or any activity that will be ongoing over a range of days. Up to three extended activities can be displayed on any one day. If you want to view additional extended activities, highlight the day and click the `Detail` check box. (See the topic Scheduling an Extended Activity (Multi-Day Event) for more on extended activities.)

## Month Page

The Month at a Time view shows a five week calendar page. You have a choice of viewing any five weeks, with the ability to scroll the display by week, or viewing only complete months. (This illustration displays the month view with scrollable weeks. To view complete months only, mark the `Month Only` check box.)   Month at a Time view indicates with an icon any days on which you have activities scheduled. If you want to see how many activities, their descriptions, or other details, highlight the appropriate day and mark the `Detail` check box.

## Month at a Time Vertical Scroll Arrows

These arrows allow you to scroll the Month at a Time view calendar page by week. What happens when you use these icons varies depending on whether or not you have the `Month Only` check box marked. If you do not have the check box marked, clicking one of these arrows will cause your red highlight box to remain in the same position, but the calendar will scroll up or down (depending on which arrow you click) one week. If you have the `Month Only` check box marked, clicking one of these arrows will cause your red highlight box to move up or down one week. (It will remain on the same day of the week.) If your highlight is on the first or last week in the month, clicking the scroll arrow will cause you to scroll to the next or previous month.

## Highlight Box

This red outline highlights the currently selected day.

## OK Button

Click this button to save changes and exit Preferences.

## Reset Button

Click this button to restore the toolbar to its default configuration.

## Cancel Button

Click this button to close Preferences without saving changes from this session.

## Title Bar

This is the TeleMagic title bar. You can click on the TeleMagic logo and open a menu with some standard Windows commands that will allow you to close the application, switch to other applications, or minimize TeleMagic.

## Windows Controls

Use these controls to reduce, maximize, minimize, or close the TeleMagic window. In the Screen Designer, only the Minimize button is avaialble.

## Menu Bar

Most TeleMagic functions can be accomplished from the menus. Open a menu by clicking on it or by pressing ALT+(THE HOTKEY FOR THE MENU). The hotkey for each menu is the letter that is underlined.

## System Toolbar

The System Toolbar is one of three toolbars available for use in the Contact Manager. The tools available for the System Toolbar are used to access TeleMagic functions such as faxing, word processing, etc. This toolbar is dockable, meaning that you can move it to other locations on the screen, and change its shape. It is also configurable: you can add and remove tools to suit your needs.

## Toolbar Dock

Toolbars in the Contact Manager are dockable. If you move a toolbar to this area, it will ‘dock’. When a toolbar is docked, its title bar is not displayed. There are docks on each of the four sides of the screen. When the Activity Manager is open, its toolbars will also dock to these toolbar docks.

## Database View Display Area

Your database view is displayed in this area.

## Primary Contact Manager Toolbar

This is one of three toolbars available in the Contact Manager. The third toolbar, the Secondary Contact Manager Toolbar, is not shown. The Secondary Contact Manager Toolbar is like the Primary Contact Manager Toolbar in all respects except that the primary is configured by default. Like the System Toolbar, both Contact Manager toolbars can be moved and reconfigured. (The Secondary Contact Manager Toolbar must be configured before it will be available.) The Contact Manager tools are used to navigate through your database and access supporting records, such as e-mail messages and sales forecasts, that are linked to your contact records.

## Status Bar

The Status Bar displays the current date, time, user, and database. There is also an indication if Num Lock is on.

## Menu Bar

Most Screen Designer functions can be accessed from the menus. Click on a menu to open it, or press ALT+(THE HOTKEY FOR THE MENU). The hotkey for each menu is the letter that is underlined.

## Screen Designer Tools

The Screen Designer Tools toolbar provides convenient access to functions commonly used to manage the objects on your screen. When in the Screen Designer, you can pause your cursor over each of these tools for the name of the control. This toolbar is dockable: you can move it to anywhere on the screen by clicking near an edge and dragging it to the desired location.

## Toolbar Dock

The Screen Designer toolbars can be moved to any location on the screen. Along each edge are docks. When you drop a toolbar near a dock, it will attach to the dock. When a toolbar is attached to a dock, its title bar will not be displayed.

## Design Area

This is where you will design your contact views. To change the area, you can place your cursor near an edge or corner. When the cursor changes to a double-headed arrow, click and drag the edge to the desired proportions. You can move the Design Area to different places on the Work Area by clicking on the title bar and dragging to the desired location.

## Work Area

This area is available for placing your work. You can use the entire area to design your view. Be careful about how large you make your views; if you are using a higher resolution display, the view may not fit on a lower resolution screen.

## Screen Designer Toolbar

The tools on this toolbar are used primarily to add controls to your contact view. They are also used to change levels, pages, and views. When in the Screen Designer, you can hold your cursor over a tool momentarily and a ToolTip will open with the name of the tool.

## Status Bar

The Status Bar indicates whether Num Lock is on and the current time.

## Calling TeleMagic Technical Support

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

Your TeleMagic reseller is your first resource for technical support. Familiarity with you and your operation makes your reseller the ideal person to answer your support questions.

If you do find it necessary to call the TeleMagic technical support team directly, please remember:

- There are a number of payment plans available for receiving technical support. See the topic TeleMagic Technical Support Plans to determine the option that best suits your needs.

- TeleMagic software support specialists are available Monday through Thursday from 8:00 a.m. until 5:00 p.m., and on Fridays from 9:00 a.m. until 5:00 p.m., Central Time.

- The busiest support hours are 11:00 a.m. to 2:00 p.m. Central Time. Try calling outside these hours for faster service.

- Be sure you have your TeleMagic serial number and version number ready when you call. This information can be found on the About screen (from the **Help** menu, select **About**). Please have your credit card ready. We accept Visa, MasterCard, Discover, and American Express.

| | |
|---|---|
| Technical Support | 972-713-0259 |
| Technical Support Fax | 972-931-4154 |
| Faxback | 800-835-6244 |
| Web Site | www.telemagic.com |
| FTP Site | ftp.telemagic.com |
| E-mail | tmsupport@sageus.com |

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|CONTDN01.BMP<JumpId(TM.HLPï¿½SUPPORT_TeleMagic_Resellers)<<1}

## Getting Help...

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Helping_Yourself)<<1} Helping Yourself

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Training)<<1} Training

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_TeleMagic_Resellers)<<1} TeleMagic Resellers

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Calling_TeleMagic_Technical_Support)<<1} Calling TeleMagic Technical Support

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_TeleMagic_Technical_Support)<<1} TeleMagic Technical Support Plans

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Electronic_Support_Internet_and_FaxBack)<<1} Electronic Support

## TeleMagic Resellers

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

TeleMagic resellers should be first contact for all installation and use of TeleMagic Enterprise. Familiarity with your particular computer setup and the way you do business on a daily basis makes your local TeleMagic reseller your best resource for assistance in planning and supporting the use of TeleMagic in your business. If you do not have a TeleMagic reseller, please call 1-800-835-MAGIC immediately to be referred to one.

TeleMagic Resellers can arrange the following support services:

- On-site support;
- Telephone support;
- Training;
- Customization;
- Additional services (contact your reseller for a list of additional services).

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP| CONTDN01.BMP<JumpId(TM.HLPï¿½SUPPORT_Getting_Help)<<1}

# Helping Yourself...

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

You can answer many of your support questions yourself using the self-help resources TeleMagic provides. If you do not find the answer to your question in the printed documentation or on-line help, you can access technical support documentation using the following:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_TeleMagic_s_Answer_Disk)<<1} TeleMagic's Answer Disk

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Electronic_Support_Internet_and_FaxBack)<<1} Electronic Support

## Training

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

TeleMagic supports TeleMagic University, which uses Authorized Training Centers to provide training on our products. There are Authorized Training Centers in most major metropolitan areas in the United States, as well as several international locations in Canada and Mexico.

Each Authorized Training Center offers Certified classes developed by TeleMagic, Inc., and these classes are taught by TeleMagic Authorized Trainers. After you have taken a Certified TeleMagic class, you can request a Certificate of Completion direct from TeleMagic, Inc.

For the most up to date information about TeleMagic University, the classes, and your local Authorized Training Center, please see the Training section of our web site at www.telemagic.com.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½SUPPORT_Getting_Help)<<1}

## TeleMagic’s Answer Disk

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

TeleMagic’s Answer Disk is so easy to use, you’ll wonder how you ever lived without it. With a few mouse clicks, you’ll be looking at the same technical support help files that the experts at TeleMagic use every day. All you need is Windows 3.0 or later. The friendly interface is designed to guide you to the answers you need. Just think of the time you will save with the answers at your fingertips. The Answer Disk contains examples of advanced features, installation hints, troubleshooting tips, and more. Don’t go another day without it. For current pricing and to order a TeleMagic Answer Disk, call us at 1-800-835-MAGIC (1-800-835-6244) or contact your Authorized Marketing Partner. For a free preview of current topics, visit www.telemagic.com.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Electronic_Support_Internet_and_FaxBack)<<1} Electronic Support

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Getting_Help)<<1} Getting Help...

## Electronic Support

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

TeleMagic provides several avenues of electronic support. These technical support options provide you with complementary access to support resources around the clock. These options are excellent forms of support that do not require “live” assistance. Electronic support provides technical support, news, and information about TeleMagic. The TeleMagic electronic services are available 24 hours a day and include the following:

**TeleMagic Electronic Support**

| | |
|---|---|
| Web Site | www.telemagic.com |
| FTP Site | ftp.telemagic.com |
| E-mail | tmsupport@sageus.com |
| Faxback | 800-835-6244 |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_TeleMagic_s_Answer_Disk)<<1} TeleMagic’s Answer Disk

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Getting_Help)<<1} Getting Help...

# TeleMagic Technical Support Plans

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

Your TeleMagic reseller is your first resource for technical support. Familiarity with you and your operation makes your reseller the ideal person to answer your support questions. If you do need to contact TeleMagic directly, we provide two different support plans:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_For_Periodic_Live_Assistance)<<1} For Periodic Live Assistance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_For_More_Active_Live_Assistance)<<1} For More Active Live Assistance (ClubMagic)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_TeleMagic_Resellers)<<1} TeleMagic Resellers

## For Periodic "Live" Assistance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

Call us at 1-972-713-0259 to receive technical assistance for $3.00 per minute ($30 minimum) conveniently billed to your credit card. Visa, MasterCard, American Express, and Discover are gladly accepted.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Calling_TeleMagic_Technical_Support)<<1} Calling TeleMagic Technical Support

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_For_More_Active_Live_Assistance)<<1} For More Active Live Assistance

## For More Active "Live" Assistance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Supportï¿½ ï¿½ ï¿½ )<<1}

ClubMagic is the “VIP” of annual membership plans. Users have the privilege of calling a specially reserved 800 number, plus they benefit from the assurance of priority assistance. ClubMagic members also receive priority assistance to fax inquiries, four complimentary issues of our *ClubMagic Connection* newsletter, and free maintenance releases for your current version of TeleMagic.

Contact TeleMagic technical support at 1-800-835-MAGIC (1-800-835-6244) for current pricing and to sign up.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_Calling_TeleMagic_Technical_Support)<<1} Calling TeleMagic Technical Support

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½SUPPORT_For_Periodic_Live_Assistance)<<1} For Periodic Live Assistance

# Tips and Hints

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

**Select a Topic:**

Automating Data Entry
Hot Key for Call Notes
Mask Files for Graphics in Screen Designer
Help in the Report Generator
Zoom Dial from a Phone Icon
Sample Documents
Time Display on Pending Activity Screen
Merging Numeric Fields in Write and WordPad
Finding Items in Lists

# Using Multiple Sessions of TeleMagic on One Workstation

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

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 for more information.

## Automating Data Entry

It is possible to complete multiple fields from a list box item using a semi-colon (;). (Simply attach the list box to the first field and use the semi-colon to separate the data for each following field.) If you are using the semi-colon, you may also use a macro in the list box that will be played out like a function key. For example, if you have a page on a record that has a selection of standard entries for the fields, you can create a list box item with each field separated by a semi-colon, followed by {ALT+S}. Selecting the item will fill in each of the fields then save the record. (The macro expression must follow the first instance of a semi-colon.)

## Hot Key for Call Notes

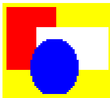
If you are placing a call using the Dialer and have placed the Call Notes dialog box in the background, you can bring it forward by pressing ALT+D on the keyboard in addition to clicking the **Call Notes** button.

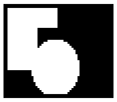
## Mask Files for Graphics in Screen Designer

It is possible to place a graphic on the contact page using the Picture tool in the Screen Designer. When adding a picture, you have the option to make the picture opaque or transparent. If you select transparent, everything that is white in the picture will show the background; any other colors will appear as normal. This is useful provided that you do not have areas of white that you would like displayed as white, or areas in other colors that need to be transparent. If you would like to customize the transparency, you must create a mask file.

To create a mask file, simply make a copy of your graphic file and change the color of every object you would like transparent to white; change the color of every object you would like opaque to black.

**Example:**





**Bitmap File** **Mask File**

The above example will cause the background and white rectangle to be to be opaque; the red rectangle and the circle will be transparent. Save the mask file in the same directory as the graphic file with the same name, but the extension .msk. When TeleMagic detects the presence of a mask file in the directory for the selected bitmap, it will override your transparency settings and use the mask file instead.

## Help in the Report Generator

If you want 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.

## 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 want 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.

# Sample Documents

Sample documents have been provided in the global and database directories for Windows Write and Word for Windows. Documents provided in the database directories include merge fields. Documents included in the global directory (which contains all of your TeleMagic files) include place holders where you can insert merge fields from your database. Consider exploring these documents to see if they can be used in your business. To use these documents, add a new document and click **File Name** to find the sample documents. They will be located in the database or global directory with a .DOC or .WRI extension. (For help with adding documents in TeleMagic, search on *Word Processing* in this help file, or go to the Word Processing in TeleMagic topic now.)

# Time Display on Pending Activity Screen

Activities displayed on the Pending Activity Screen will be in 24 hour time, regardless of your preferences. To convert from 24 hour time to 12 hour time, subtract 12 from the hour when it is greater than 12. For example:

| **24 hour** | **12 hour** |
|---|---|
| 09:45 | 9:45 a.m. |
| 12:15 | 12:15 p.m. |
| 13:30 | 1:30 p.m. |
| 17:10 | 5:10 p.m. |

## Merging Numeric Fields in Write and WordPad

When merging numeric fields with decimals in documents created in Write or WordPad, nothing to the right of the decimal will print. This is due to the way these applications handle data in fields.

If you would like this information to print, you must use the Expression Builder when the field is first added to convert the data being merged to a character string using the STR() function. For example, str(contact3.unitprice,10,2) will print the 10 character long field “unitprice” with two decimal places.

## Finding Items in Lists

You can use the keyboard to quickly navigate through a list of items, such as a list box or a drop-down list. If you type in the first letter of the item for which you are searching, your highlight will appear on the first item in the list that begins with that letter. For example, if you were searching a list box on the State field for Maine, you could type “M” to go directly to the first state starting with M, or Massachusetts. If you continue to type “M”, your highlight will move through the states beginning with M until it reaches Montana, then it will return to Massachusetts. Alternatively, you can quickly type the entire word, or as much of the word as is necessary to locate it, and your highlight will appear on that word. Using the above example, you would type “MA” to locate Maine directly. Keep in mind that if you pause between typing the letters, TeleMagic will think you are searching for the first item that starts with the first letter, then the first item that starts with the second letter; so typing “M” pause “A” would move the highlight to Massachusetts then to Alberta.

# Cautions

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

Large Font Issues
Compatibility with Wireless Messaging
Invalid Record Descriptor
Field Validation with the Semi-colon “;”
Deleting Fields
Adding TeleMagic V2 Templates
Sizing Objects in the Screen Designer
Changing Users in Group Activities
Resetting Unique Numbers
Faxing Documents from Lower Levels
Word Processor Template Files
Faxing from Word 7
Supported Word Processors
Rebuild Hold Time
Editing Records During Phone Calls
Spell Checker Case Sensitivity
Fonts in Notepads
Security on Merge
Synchronizing the LCL Field
Security on List Box Reports

# Large Font Issues

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

## Databases

TeleMagic now supports workstations running large fonts. The databases that have been provided with TeleMagic V3.5 and later have been formatted to be compatible with this configuration. Databases that were installed with previous versions of TeleMagic, however, may cause errors in large fonts. If you have upgraded from a previous version, before you attempt to open your databases in large fonts, you should open every view and page in each database and follow the instructions in Large Font Issues in the Screen Designer to make sure they will not cause a problem in large fonts.

## Video Drivers

If you are using large fonts in Windows, you may experience visual problems with TeleMagic (and with other Windows applications) with some video drivers. This may cause some objects to appear misaligned, or the screen to not refresh as it should.

## Compatibility with Wireless Messaging

Before setting up Wireless Messaging in TeleMagic, you should contact your paging carrier to verify that they (and the terminal to which you are currently connected) can accommodate messaging from modems. TeleMagic uses Telocator Alphanumeric Input Protocol (TAP) with its Wireless Messaging feature. Your carrier must use TAP, and its implementation must be compatible with TeleMagic. Not all carriers that use TAP use the same implementation. Once you have set up the Wireless Messaging feature, it is also recommended that you perform a test page to verify that your paging system is compatible and can accommodate pages from TeleMagic.

## Invalid Record Descriptor

If you receive a message informing you that your record descriptor is invalid, one of the fields referenced in the expression for the record descriptor has probably been deleted from the database. Search on *Record Descriptor* in this help file for information on updating the expression.

## Deleting Fields

If you delete a field from the Edit the Field List dialog box, then create a calculated, validated, or default value expression for another field, the deleted field will appear on the Fields list in the Expression Builder. TeleMagic does not fully remove the field until you have saved all changes and exited the Edit the Field List dialog box. (This allows you to cancel the entire work session should you decide to discard your changes.) If you select the field as part of the expression, your expression will be invalid.

## Adding TeleMagic V2 Templates

If you want to add a template created in an installation of TeleMagic Enterprise V2, you must perform an *external* rebuild if the database includes list boxes. External 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.

## Sizing Objects in the Screen Designer

If you size an object in the Screen Designer using CTRL and an ARROW key, make sure you do not move the sizing border past the opposite edge of the item. If you do so, an error will occur.

## Changing Users in Group Activities

If you assign an activity to a group of users, then later edit the activity to remove a user from the list, the activity will be deleted from that user's calendar. The user will not be notified that the activity has been deleted.

If you edit a group activity and select another group, the users in that group will be added to the existing list of users. If you want to replace the original group with the new group, first remove all users from the group activity, then select the second group.

## Resetting Unique Numbers

If you have made a change to your unique number template and would like the change reflected in existing unique numbers, you can use the Reset Unique Numbers feature to update the fields. When updating unique numbers, you have the option of resetting the counter portion only, or the entire field. If you select the entire field, be aware that any dates in the unique number will be replaced with the current system date. If it is important to keep the date information that was originally generated, do not reset the entire field.

## Faxing Documents from Lower Levels

When a word processing document is created, it is associated with a contact level. When you fax a document, it is not recommended that you fax documents linked to a lower level. For example, if you have a document with Level 3 fields and attempt to fax it from Level 2, TeleMagic will not know which Level 3 child record you want to merge. If you need to fax lower level documents to a higher level record, point the Fax Key Field for the lower level to the fax field on the parent level, then send the fax from the lower level record.

## Word Processor Template Files

WordPerfect, Microsoft Word, and Word Pro have template files that control the look of your documents. If you are using the Automation Server to print or fax documents, the templates for all users and the server should be using the same definition. If there are differences between the templates in the installation used to create the document and the installation used to print or fax the document, there could be dramatic differences in the layout. (Template files in Word for Windows end in the extension .DOT, in WordPerfect they end in .WPT, and in Word Pro they end in .MWP.) Note that templates are sometimes called style sheets, and that in Word Pro they are called SmartMasters.

## Faxing from Word 7

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

## Supported Word Processors

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

TeleMagic V4 supports the following word processors:

- Microsoft Word for Windows V2.0 and V6.0
- Microsoft Word 95 and Word 97
- Corel WordPerfect 6, 7, and 8
- Lotus Word Pro 97
- WordPad*

TeleMagic Enterprise V4 will not support DDE word processing merge or WordPerfect V5.2. If you have existing documents in these word processors, you must convert them to one of the currently supported word processors.

*WordPad is not supported in Windows 98, except in the Automation Server.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP|
CONTDN01.BMP<JumpId(TM.HLPï¿½WORD1_Using_TM_Merge)<<1}

## Rebuild Hold Time

If you select the `Delay Until` radio button in Rebuild, you must also enter the date and time. If you do not, the rebuild will begin immediately.

## Editing Records During Phone Calls

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

## 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.

## 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.

## Security on Merge

If you select a document for print merge or faxing that was created by another user, it may contain fields to which you do not have security access. If this occurs, a blank space will be printed in place of the field.

## 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 subsequent fields will not be completed.

## Synchronizing the LCL Field

If you have a Last Call (LCL) field in database, all sites must be using the same date format in order for entries to synchronize properly.

## Security on List Box Reports

Users will be able to run a list box report on fields to which they do not have security access. Although this will not indicate what data is contained in any specific record, it will show possible entries for the field. Careful consideration should be given to attaching list boxes to fields containing extremely sensitive information.

# Upgrade Issues

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

Field Lengths
Default.*
ALT+P
Browse Preferences
Writing Preferences
Automatic Login of TST Removed
Invalid Icons

## Field Lengths

In versions of TeleMagic Enterprise prior to V3.1, it was possible to create a field that was 254 characters long, however, attempting to edit a template to extend beyond 250 characters would occasionally cause errors. The field lengths are now limited to 250 characters. If you edit an existing field that is 254 characters, the field will be truncated.

## Default.*

If you have upgraded to V4 from V2.x, you had the ability to create documents named DEFAULT.* (where * is the file extension used by your word processor) that would be used as word processing templates. With the ability to create templates that can be selected at the time a document is added, the default documents are no longer necessary. If you have a default document that you would like to continue to use, add a template and point to this file.

## ALT+P

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 want to paste contact information to the clipboard, select **Paste Contact Info to Clipboard**, or press CTRL+P.

## Browse Preferences

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.

## Writing Preferences

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

## Automatic Login of TST Removed

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 to 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 in other than TST) the first time you access V4. (You may continue to log in as TST if you desire.)

## Invalid Icons

The file MERGE.EXE has been removed. The file TMFAX.EXE has been changed to TMAUTSRV.EXE. If you had a MERGE.EXE icon on your desktop or program group, it will be removed on upgrade. If you had a TMFAX.EXE icon, it will remain, but you will be instructed to update it with the new file information if you try to launch it.

## Selecting Items from Lists with the Keyboard

Items on a list may be accessed by typing the first letter, or first few letters, from the keyboard. If you type in the first letter, and there are several items in the list which start with that letter, the first one will be highlighted. After a brief (fraction of a second) pause, retyping that same letter will cause the next item on the list to be highlighted. If there are no more items on the list beginning with that letter, the highlight will return to the first item on the list beginning with that letter.

If you type several letters quickly TeleMagic will attempt to find an item from the list which begins with that string of characters.

The presence or absence of a pause between letters while typing in selections from lists can produce some confusing results. For instance, if you intend to move through a group of selections beginning with the letter ‘a’ and you do not pause sufficiently on one of the keystrokes, TeleMagic will attempt to find an item beginning with ‘aa’. If you had already bypassed items starting with ‘aa’, it may seem that a malfunction has occurred.

Another example of how this feature can cause confusion involves entering a string of letters too slowly. If you wanted to find a list item which begins with the letters ‘aro’, and you type them in too slowly, TeleMagic will highlight the first item beginning with ‘a’, followed by the first item beginning with ‘r’, etc. In this example, if you had a pause between the ‘a’ and the ‘r’, but not the ‘r’ and the ‘o’, TeleMagic would highlight the first item beginning in ‘a’ and then the first item beginning with ‘ro’.

## Deleting a User's Mailbox

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

To use TeleMagic Internet Mail, a mailbox must be established. This mailbox is machine-specific: information regarding the location of the user's mail is stored in the Registry. When a user is deleted from TeleMagic, their mailbox is not automatically removed from their workstation. This allows an individual who no longer has access to TeleMagic to continue using TeleMagic Internet Mail as their mail client.

There are some implications of this arrangement:

- You cannot use the same user ID for two different TeleMagic installations on the same machine. If you need to access two different installations from the same machine, use a different user ID for each. You can use the same user ID from different machines for different installations. (You can access different databases with the same user ID, as long as they are in the same TeleMagic installation.)
- You cannot have two different users with the same user ID using the same machine, even if they never access the same installation of TeleMagic.
- If a user establishes a mailbox on a machine and that machine is subsequently assigned to another user with the same user ID, the original mailbox must be deleted in order for the new user to establish their mailbox.

### To Delete a Mailbox:

- From the Windows Run dialog box, open TeleMagic Internet Mail using the following command line parameter:

  /CLEANREG=???

  Replace the question marks with the user ID of the user whose mailbox is being deleted.

  **Example:**

  If your installation is installed on the C drive in the \TM4 directory, and the user's ID whose mailbox is being deleted is JRC, this is what you would enter in the Run command line:

  C:\TM4\PROGRAMS\TMMAIL.EXE /CLEANREG=JRC

  Note that there is a space between TMMAIL.EXE and the forward slash (/) character.

# Printing Help Topics

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Tipsï¿½ ï¿½ ï¿½ )<<1}

The online help system includes information that is not found in TeleMagic's printed manuals. Also, some users prefer to work from a printed set of instructions than from the screen. To accommodate this, WinHelp provides a convenient means of printing help topics. You can print either single topics, or groups of topics. You can also print pop-up topics.

TeleMagic's online help system is rather large. To print the TeleMagic main help system will require approximately 1,500 single-sided sheets. This does not include context-sensitive help or any of the smaller help systems such as Data Synchronization Server help, DBUTIL help, etc.

If you need to print a large number of topics, it is recommend that you use a workstation running Windows NT. Windows 95 and Windows 98 tend to lose resources as a result of printing help topics. This problem is more severe under with Windows 95.

If you must print a large number of help topics on a workstation using Windows 95, insure that all Windows 95 updates have been installed. It is especially important that the Windows Library Update be installed. Service releases for Windows can be downloaded from the Microsoft web site at www.microsoft.com. You should also monitor available resources The Windows resource monitor (RSRCMTR.EXE, found in the /WINDOWS directory) will provide adequate information regarding available resources. When any resource category falls to 30% or below, you should restart Windows. If you encounter any errors while printing help topics under Windows 95, you should re-install the Windows Library Update. The number of topics that can be printed before resources run critically low depends upon the total available resources and how many resources are being used by other applications.

When printing groups of topics from a workstation running Windows 98, you should monitor available resources using the Windows Resource Monitor (RSRCMTR.EXE, found in the /WINDOWS directory). When any resource category drops to 20% or lower, you should close the help project and re-open it. If you encounter an error while printing groups of topics, close the help system and re-open it. There is normally no need to restart Windows 98 to recover lost resources. The number of topics that can be printed before resources run critically low depends upon the total available resources and how many resources are being used by other applications.

No special precautions are required when printing groups of help topics from a workstation using Windows NT.

## To Print a Single Help Topic:

- Open the topic you want to print and click **Print**.

**or** Follow the instructions for printing a group of topics, only select a single topic rather than an entire book in step 3.

## To Print a Group of Help Topics:

1. From the main screen of the TeleMagic application you are using, open the **Help** menu and select **Help Index**.

The Help Topics dialog box will open.

2. If the contents page is not open, click **Contents**.

3. Select the book containing the set of topics that you want to print. You can double-click the book to reveal its contents. The title of the book or topic to be printed should be highlighted before proceeding.

**Warning!**
When you select a book for printing, WinHelp will attempt to print all topics in that book and all topics in any books contained in the selected book. Some books effectively contain hundreds of topics. If you are using Windows 95 or Windows 98, trying to print very large books may result in an “Out of Memory” error. It is recommended that books containing other books not be printed using either of these operating systems. Double click on a book to open it and see if it contains other books before attempting to print. Check your available system resources before printing any group of topics. This problem does not occur with Windows NT.

4. Click **Print…**.

   The Print dialog box will open. Click the appropriate button to proceed. All topics in the selected book and any books contained in the selected book will be printed.

Pop-up help topics open when you click on a hotspot that has a dotted underline. They have no controls and cannot be scrolled.

## To Print a Pop-up Help Topic:

1. Open the pop-up topic you want to print and right-click on the topic.

   A pop-up menu will open.

2. Select **Print** to print the topic. If you choose **Copy**, the topic will be copied to the clipboard.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.hlpï¿½TMMAIL_Using_This_Help_System)<<1}

# Utilities and Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

## Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½UM1_Data_Backup)<<1} Data Backup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½UM1__Rebuilding_Data_Rebuild)<<1} Rebuilding Data (Rebuild)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP| _____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records)<<1} Exporting Records

# Data Backup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Hint_for_Data_Backup)<<1} {ewc rhgbtn32.dll,
BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Making frequent backups of your files is an effective and relatively inexpensive way of insuring against loss. While there is no specific backup command within TeleMagic, it is important to perform regular backups of your important data files. TeleMagic can be backed up using the backup utility that is currently used for other applications and data files on your network or PC. (If you have no backup routine in place, you should implement one as soon as possible to preserve the integrity, not only of TeleMagic, but of all files in your system.)  If you are using TeleMagic on a network, you should ensure that regular backups of the *entire system* are being made. This includes the TeleMagic root directory (\TM4 by default), and all files and directories beneath it. You should also ensure that databases being stored in a location other than off the global directory path (which contains all of your TeleMagic files) are being backed up. This must be done by a user account, such as a supervisor-equivalent account, with sufficient network rights to read all of the database files to be backed up. If any users are storing databases or activities on a local (non-network) drive, backup of those files is those users' responsibility. Make sure that each user is made aware of this necessity, and instructed on how to perform a backup of the appropriate files.

When a new database is added or an existing one copied, TeleMagic requires that a new directory be created. By keeping these new directories under the TeleMagic default database directory path (located off the TeleMagic global directory, \TM4\DATA\, by default), you will not only make the new databases available to other users—subject to security constraints as explained in the *Security* chapter of the *System Administrator Guide* —but also make them easier to back up as a group.

When performing backup of TeleMagic, remember the following:

If a file is in use when backup is performed, the backup utility will not back up the file. It is important to make sure that all users are out of TeleMagic, Data Synchronization Server (if installed on your system), and the Automation Server before backup is performed.

Many backup utilities can be set to back up only files that have been changed since the last backup. If you are using this type of backup, it is important that you ensure that full backup is also performed on a regular basis.

If you ever need to restore a backup copy of TeleMagic, we urge you *not* to restore one file at a time. You must restore the entire installation or you may encounter serious problems when you try to open TeleMagic. If you are forced to consider restoring files individually, contact TeleMagic technical support before proceeding.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_How_You_Should_Back_Up)<<1} How You Should Back Up
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_What_You_Should_Back_Up)<<1} What You Should Back Up
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_When_You_Should_Back_Up)<<1} When You Should Back Up

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP<JumpId(TM.HLPï¿½UM1_TeleMagic_Directory_Structure)<<1} TeleMagic Directory Structure

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# How You Should Back Up

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

You should use a good tape backup system or floppy-backup program. If you have a fairly large TeleMagic installation, or need to back up directories on different network drives, we highly recommend investing in a tape backup system.

Use more than one set of backup tapes or disks, and rotate them between backups. This reduces wear on the backup media, and ensures that you have more than one recent backup in case one set fails. We recommend at least three separate backup sets.

Keep a current backup off site in a safe place. In case of fire or theft, your data will be protected. Make a policy of bringing, for example, Monday’s backup to the storage site and swapping it for the previous week’s backup.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_What_You_Should_Back_Up)<<1} What You Should Back Up
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP<JumpId(TM.HLPï¿½UM1_TeleMagic_Directory_Structure)<<1} TeleMagic Directory Structure
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# What You Should Back Up

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

See TeleMagic Directory Structure for a description of the default TeleMagic directory setup.

Back up the contents of the TeleMagic root directory (\TM4 is the default name).

Back up all directories that are sub-directories of the TeleMagic root directory. Not only are some of your own databases typically stored here, but also all user settings, toolbar icons, the Automation Server, and Data Synchronization Server (if in use in your system).

Back up any other database directories that are not already sub-directories of the global directory. (This does not replace backing up the entire installation. It is not enough only to back up databases on a regular basis. They will not run without the root directory and its sub-directories.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_How_You_Should_Back_Up)<<1} How You Should Back Up

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_When_You_Should_Back_Up)<<1} When You Should Back Up

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

## When You Should Back Up

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Back up your system on a daily basis, if possible. It is not a question of IF, but of WHEN your system will fail. The more recent your backup, the more data is recoverable and less data are lost. If your data are important to you, a daily backup is a very cheap insurance policy for long term data integrity.

Back up before performing imports. This way, if you import records that you later decide you do not need, you can simply restore the entire database from the tape copy and start over. (See the Import Records from Another Program topic for additional important pre-import hints and cautions.)

Back up before performing a group delete or group replace.

Back up before making structural changes (such as adding or deleting fields, or changing the expressions for calculated fields) to your contact database.

Back up before you make any major change to your system. This would include upgrading or updating the installation, or installing any add-on products.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_How_You_Should_Back_Up)<<1} How You Should Back Up

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_What_You_Should_Back_Up)<<1} What You Should Back Up

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP<JumpId(TM.HLPï¿½UM1_TeleMagic_Directory_Structure)<<1} TeleMagic Directory Structure

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

## TeleMagic Directory Structure

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Directly after installation, your directory structure should look like the following. (Drive and directory names and locations will vary depending on where you have installed TeleMagic. This list assumes TeleMagic has been installed in F:\TM4.)

| | |
|---|---|
| F:\TM4 | The TeleMagic root directory. This directory contains all of the sub-directories described below. There are not normally any files stored here. |
| F:\TM4\COMMON | This directory contains files common to all databases and all users. |
| F:\TM4\DATA | This directory contains sub-directories for the databases that were installed with TeleMagic. Database directories contain all of the tables that make up one contact database. The number and names of the databases installed will vary depending on your choices when you installed TeleMagic. |
| F:\TM4\HELP | The online help files (e.g., TM.HLP) are stored here. |
| F:\TM4\PROGRAMS | The TeleMagic program files (e.g., TM.EXE) and other files needed to run TeleMagic are stored here. |
| F:\TM4\TMFAX | Files related to the TeleMagic fax system are stored here. |
| F:\TM4\TMFAX\FAXDOCS | This directory contains the merged documents and fax files for the automation server. It is from this directory that the finished file is printed, faxed, or e-mailed. |
| F:\TM4\TMSYNC | If Data Synchronization Server is installed, files related to it are stored in this directory. The sub-directories for your default inbox and outbox can be found in this path. |
| F:\TM4\TMSYNC\PACKETS | If the remote receives more than one packet via TeleMagic Internet Mail before it has a chance to process one packet, the packets will be copied to this directory. For more information on this directory, see the *Synchronizing Your Data* chapter of the Data Synchronization Server guide. |
| F:\TM4\TOOLS | The toolbar bitmap directory. This contains all the bitmaps used by the TeleMagic toolbar. You can use Paint or any similar bitmap editor to customize these tools. Any user-defined icons to be used must be stored in this directory. |
| F:\TM4\USERS | The directory containing sub-directories for TeleMagic users. A user's directory contains all the files specific to that user. It is also the directory where the majority of temporary files are created. Each user's sub-directory will be named for his or her three-character User ID. |

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_How_You_Should_Back_Up)<<1} How You Should Back Up
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_What_You_Should_Back_Up)<<1} What You Should Back Up
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Up
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Rebuilding Data (Rebuild)

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Periodic rebuilding is necessary to shorten processing time and speed data access. During a rebuild, TeleMagic permanently removes records that have been marked for deletion; condenses memo fields; updates lists; and updates the records in index order.

For maximum program efficiency, you should rebuild on a regular (preferably daily) basis. At a minimum, rebuild after: adding contact views, pages, or fields to the Contact Manager; after adding, changing, or deleting more than 10% of total records or notes in either the Contact or Activity Manager; or whenever access seems slower than usual.

Rebuilds are especially important for databases containing memo/notepad fields. These fields can grow quickly, especially with many users. Rebuilding trims note fields down to actual data, removing excess blanks and making the database much smaller.

You can run a rebuild any time, or specify a future date and time to rebuild. (If you are running on a network, see Precautions when Rebuilding on a Network, before proceeding.)   Make sure you have room on your disk drive to store the intermediate results of the rebuild.

The time required for a rebuild will depend upon your hardware, the total number of records in your database, and the total number of changed records in your database. It will also depend upon whether you perform a full or partial rebuild. (Full rebuild means accepting the rebuild defaults. A partial rebuild means selectively excluding areas of TeleMagic from the rebuild.)

**WARNING!**

*Always backup your data before performing a rebuild.* If your computer system fails for any reason during rebuild, you could lose data. If you must interrupt a rebuild while it is running, use the ESC key. TeleMagic will finish with the file it is currently rebuilding before shutting down. Be patient until this has completed. If the rebuild is stopped without completing the current file, you could lose data. If the rebuild is interrupted before it is completed, a file named ‘xxxxxxxx.rbd’ will be left in your main TeleMagic directory (where ‘xxxxxxxx’ represents a unique, eight-character, alphanumeric sequence assigned by TeleMagic). This file will indicate the last files that were successfully rebuilt. It can be opened in any text editor, such as Windows Notepad. If this file exists, you should perform the rebuild again. If the second rebuild cannot be completed successfully, or you receive error messages when accessing TeleMagic, you may need to restore your backup.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Precautions_when_Rebuilding_on_a_Network)<<1} Precautions when Rebuilding on a Network

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Running_a_Rebuild)<<1} Running a Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Rebuilding_User_defined_Indexes)<<1} Rebuilding User-defined Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

## Precautions when Rebuilding on a Network

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Access to the rebuild function is subject to TeleMagic group security restrictions. For a rebuild to proceed, the TeleMagic user account running the rebuild must be a member of a TeleMagic security group that allows rebuilds. If it is not, the **Rebuild** option will be dimmed (unavailable) on the **File** menu. See the *Security* chapter in the *System Administrator Guide* for more on rebuild rights.

TeleMagic requires sole access to any databases or files it is to rebuild. If you will be performing a full rebuild, all users, except the one running the rebuild, should exit TeleMagic. To ensure the success of the rebuild, there should be only one copy of TeleMagic running ( on the workstation performing the rebuild). If there are other users in TeleMagic when a rebuild is run, you will be given a warning that files which are in use will not be rebuilt. While TeleMagic is rebuilding a database, users will not be able to access that database. (Keep in mind that the Automation Server and Data Synchronization Server also access TeleMagic files. If you normally leave these programs in process mode, you should either shut them down or set a downtime during rebuild.)

If you are a supervisor user, you can disable login when you are ready to perform the rebuild. This will force all other users out of TeleMagic and keep any users from opening the program. While login is disabled, you will be able remain in the program to perform internal rebuild.

If users who are not supervisors frequently initiate rebuild, it is recommended that a supervisor establish a system downtime. This is similar to disabling the login with two exceptions: a downtime occurs at the same time each day, so it does not need to be initiated by a supervisor user each time; and no users will be able to remain in the program or log into TeleMagic during the downtime. (If you are using the downtime feature, you will need to perform an external rebuild.)

For information on disabling login and setting a downtime, see the System Preferences topic.

Make sure that the user account initiating the database rebuild has sufficient network disk space available to it before performing the rebuild. (Some networks can restrict the amount of space available to particular users, either for the entire network or a particular directory.) As a general rule of thumb, locate the largest file TeleMagic will be required to rebuild and make sure you have free hard disk or network space of at least 1 ½ times its size.

If they are to be run nightly, TeleMagic rebuilds should be scheduled for just *after* your regular backup. This way, if the rebuilt database for some reason encounters a problem, or the rebuild process is stopped, you have the very latest data on tape. *Do not* schedule them simultaneously—you will not be able to back up files being rebuilt. If the rebuild does not complete successfully, a file named ‘xxxxxxxx.rbd’ will be left in your main TeleMagic directory (where ‘xxxxxxxx’ represents a unique, eight-character, alphanumeric sequence assigned by TeleMagic). This file will indicate the last files that were successfully rebuilt. It can be opened in any text editor, such as Windows Notepad. If this file exists, you should perform the rebuild again. If the second rebuild cannot be completed successfully, or you receive error messages when accessing TeleMagic, you may need to restore your backup.

Remind all users on your network that any database or activity files they store locally will not be rebuilt by the standard network rebuild, unless that rebuild is run from their own workstation. If users have stored database or activity files locally, periodically run the rebuild from their workstations to ensure that those files are being rebuilt. (Ideally, only users with security access to rebuild should store files locally. In this way, they can perform periodic rebuilds from their workstations themselves.)

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Running_a_Rebuild)<<1} Running a Rebuild
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Rebuilding_User_defined_Indexes)<<1} Rebuilding User-defined Indexes
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

## Running a Rebuild

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

A full rebuild packs and re-indexes all records, notes, activities, and related files for one or more databases. While partial rebuilds are possible, we recommend performing a complete rebuild whenever possible.

During packing, TeleMagic removes all blank spaces between records, so that the database occupies the least possible storage area. Whenever you have deleted more than 10% of your records, packing will significantly improve processing speed.

During re-indexing, TeleMagic sorts and re-numbers all records according to your designated display order(s). Whenever you have added or deleted more than 10% of your records, re-indexing will significantly improve processing speed.

Access to the rebuild feature is subject to group security restrictions. For a rebuild to proceed, the TeleMagic user account running the rebuild must be a member of a TeleMagic security group that allows rebuilds. If it is not, the **Rebuild** option will be dimmed (unavailable) on the **File** menu. Contact your network or TeleMagic administrator for access.

### To Run a Rebuild:

1. From the **File** menu, select **Rebuild**.

   The Rebuild dialog box will appear.

2. If you want to perform a full (default) rebuild that will rebuild all system, global, user, and floating files, plus the current database, click **OK**. (Refer to step 13 for information on what you will see as the rebuild progresses.)

**or** If you want to customize your rebuild, refer to steps 3 through 12, below.

3. If you want to set a hold time on your rebuild, see Setting a Hold Time for Rebuild.

4. If you want to print a report on the results of your rebuild, mark `Run Rebuild Report` in the `On completion` section. (If you have encountered any problems in the operation of TeleMagic, it is highly recommended that you run the rebuild report.)

   If you select to run a rebuild report, the report radio buttons will become available.

5. If you want to run a full report on all that occurred during the rebuild, select the `Full Report` radio button.

**or** If you only want to report on any errors that were encountered during rebuild, select the `Errors Only` radio button.

6. If you want TeleMagic to shut down automatically when the rebuild is finished, mark `Quit TeleMagic` in the `On completion` section.

7. If you do not want to rebuild your system files, leave the `System` check box blank. (If selected, this option will rebuild the core files required to run TeleMagic.)

8. If you do not want to rebuild the database files, leave the `Database` check box blank. If want to specify which databases are rebuilt, leave the `Database` check box marked and see Database Files. (By default, only the current database will be rebuilt.)

9. If you do not want to rebuild the global files, leave the `Global` check box blank. If you want to specify which global files are rebuilt, leave the `Global` check box marked and see Global Files.

10. If you do not want to rebuild your user files, leave the `User Tables` check box blank. If you want to specify what user files are rebuilt, leave the `User Tables` check box marked and see User Tables.

11. If you do not want to include the floating files in the rebuild, leave the `Floating` check box blank. If you want to specify which floating files are rebuilt, leave the `Floating` check box marked and see Floating Files.

12. If you want to perform a partial rebuild that only re-indexes, select the `Reindex` radio button. (Reindexing sorts and re-numbers all records according to your existing indexes.) If you want to pack and reindex, mark the `Pack and Reindex` radio button.

**WARNING!**

Among other things, packing permanently removes all records that have been deleted from the databases being rebuilt. If you have deleted records that you need to restore, restore them before packing the database.

13. When satisfied with your selections, choose **OK** to start the rebuild.

    As the rebuild runs, status boxes will display the rebuild progress, showing the database being rebuilt, the path to the database, and the table that is currently being rebuilt. A count of records indexed will appear at the bottom of the screen.

While performing a rebuild TeleMagic maintains a text-format record of the rebuild. If the rebuild is successful, this file will be named ‘rebuild.rbd’ and stored in the TeleMagic common directory, \TM4\COMMON by default. If the rebuild is unsuccessful, the file will remain but will be named ‘xxxxxxxx.rbd’, where ‘xxxxxxxx’ represents a unique, eight-character, alphanumeric sequence assigned by TeleMagic.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Precautions_when_Rebuilding_on_a_Network)<<1} Precautions when Rebuilding on a Network

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Rebuilding_User_defined_Indexes)<<1} Rebuilding User-defined Indexes

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# REBUILD.INI

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

**WARNING!**
Creating .INI files is an advanced feature that should be handled by the system administrator.

If you frequently use command line parameters to automate external rebuild, you can place this same information into an .INI file to facilitate the process. (This is especially useful if you access external rebuild from the Run dialog box.)

Create a REBUILD.INI file in the TeleMagic common directory (\TM4\COMMON by default) with the following lines:

[Rebuild]

| | |
|---|---|
| User And Floating=**Y** or **N** | **Y** will rebuild the user and floating files;<br>**N** will skip user and floating files in rebuild. |
| Calculated Fields=**Y** or **N** | **Y** will rebuild calculated fields;<br>**N** will skip calculated fields in rebuild. |
| Report=**NONE**, **ERROR**, or ***Blank*** | **NONE** will not run a rebuild report on completion;<br>**ERROR** will run a report detailing errors only;<br>Leave this line out to run the default full report. |
| Erase Error File=**Y** or **N** | **Y** will clear any errors existing in the Error Log;<br>**N** will not touch the Error Log file on rebuild. |
| Time=***HH:MM*** or ***Blank*** | Enter the time (in 24-hour format) to begin rebuild;<br>Leave this line out to run the rebuild as soon as REBUILD.EXE is launched. |
| DB1=**ALL** or ***DATABASE_NAME*** | **ALL** will cause all databases to be rebuilt;<br>Enter a database name to rebuild only that specific database. (If you want to rebuild more than one, enter a new line starting with DB2=***DATABASE_NAME***, then DB3=***DATABASE_NAME***, etc.) The database name must be entered in uppercase letters.<br>Leave this line out if you do not want to rebuild a database. |

Items in bold should be entered exactly as they appear. Items in bold-italic should be entered as stated.

If TeleMagic locates the REBUILD.INI file in the global directory (which contains all of your TeleMagic files), it will have the same effect as launching REBUILD.EXE with the /R command line parameter.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1__Rebuilding_Data_Rebuild)<<1} Rebuilding Data

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_TeleMagic_Command_Line_Parameters)<<1}
TeleMagic Command Line Parameters

# Setting a Hold Time for Rebuild

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ï¿½ )<<1}

TeleMagic allows you the option of specifying rebuild start date and time. This allows you to set rebuild options, but also to wait until the specified time for the rebuild to commence. For example, you may run a rebuild at night after performing a backup. You can create the rebuild settings before you leave for the evening with a hold time until after the backup is completed.

This feature is designed for use in situations when you will be away from your workstation and unable to initiate the rebuild at the desired time. When you set a hold time, a wait dialog box will appear and remain on screen until the rebuild is started (unless you manually cancel or instruct TeleMagic to commence with the rebuild immediately). You will not be able to work in TeleMagic until the rebuild has been performed. Therefore, it is recommended that you access the rebuild option at a time when you will not be at your workstation (such as when you leave for the day) or at the time you want the rebuild to commence.

## To Run a Rebuild at a Future Date or Time:

1. From the **File** menu, select **Rebuild**.
2. Select the `Delay Until` radio button.

   The `Start Time` and `Start Date` fields will become available.
3. Enter the time you want the rebuild to begin in the `Start Time` field, using your default time format.
4. Enter the date you want the rebuild to begin in the `Start Date` field, using your default date format.
5. Make any other necessary settings following the guidelines in To Run a Rebuild.
6. To proceed with the rebuild, choose **OK**.

   The Rebuild Wait dialog box will display.

   This dialog box will remain on the screen until the appointed time for the rebuild. The rebuild will run at the date and time specified. Although you will not be able to use TeleMagic, you can switch to other applications while waiting for the rebuild to commence.

**or** If you do not want to wait for the specified time to perform the rebuild, choose **Start** to override the specified date/time and begin rebuilding immediately. Make sure no one else is using TeleMagic before starting a rebuild.

**or** If you want to abort the rebuild, select **Cancel**. You will return to TeleMagic; no rebuild will run.

**WARNING!**
Be sure that all other users have exited the database before the rebuild begins.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Database_Files)<<1} Rebuilding Database Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
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{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_User_Tables)<<1} Rebuilding User Tables.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Floating_Files)<<1} Rebuilding Floating Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Rebuilding Contact Database Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ï¿½ )<<1}

Database files store your contact records. Along with records, they store related sorting criteria (filters), import and export formats, quick list and report formats, and contact views. When you perform a rebuild, you can specify which database(s) to rebuild and whether you want to rebuild the records only, or rebuild records and some or all of these related sort criteria, formats, and views.

If you have made changes in TeleMagic, a partial rebuild will allow you to quickly rebuild changed files. It is not intended to replace a full rebuild. All files need to be periodically rebuilt to ensure maximum program efficiency. You should implement a regular rebuild schedule to rebuild your entire TeleMagic system, in addition to any quick partial rebuilds you run.

## To Select Databases and Database Files for Rebuild:

1. From the **File** menu, select **Rebuild**.

2. Make sure the `Database` check box is marked and click the **Database** button.

   The Database Files dialog box will open.

3. From the `Databases` list, select the database you want to rebuild, then choose **Add**. TeleMagic will add the database name to the `Databases to rebuild` list. Repeat this for each database you want to include.

**or** Choose Add All to add all databases to the `Databases to rebuild` list.

4. Leave all of the check boxes marked to perform a full rebuild of the selected database(s).

**or** If you only want to rebuild the database partially, leave the options that you do not want to rebuild blank.

   **Examples:**

   If you have added or deleted contact records, but have not made any other changes, leave all blank except `Contact Data`.

**or** If you have not added new records, but have set up new data import formats, leave all except `Import Formats` blank.

**or** If you have created new contact views and filters, but you made no other changes, all except `Views` and `Filters blank`.

5. If you want to rebuild calculated fields, mark the `Calculated Fields` check box.

6. If you want to rebuild only a single level of the selected database(s), mark the `Rebuild Level Only` check

box and select the level from the drop-down list.

7. Choose **OK**.

   The Database Files dialog box will close, returning you to the Rebuild dialog box.

8. Make any other necessary settings following the guidelines in To Run a Rebuild.

9. Choose **OK** to proceed with the rebuild.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Setting_a_Hold_Time_for_Rebuild)<<1} Setting a Hold Time for Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Global_Files)<<1} Rebuilding Global Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_User_Tables)<<1} Rebuilding User Tables.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Floating_Files)<<1} Rebuilding Floating Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Rebuilding Global Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Global Files store information that relates to all databases and users in your copy of TeleMagic. Global files include names and storage locations of all databases, and security settings for all users, groups, records, and fields.

If you have made changes in TeleMagic, a partial rebuild will allow you to quickly rebuild changed files. It is not intended to replace full rebuild. All files need to be periodically rebuilt to ensure maximum program efficiency. You should implement a regular rebuild schedule to rebuild your entire TeleMagic system, in addition to any quick partial rebuilds you run.

## To Do a Partial Rebuild of Global Files:

1. From the **File** menu, select **Rebuild**.
2. Make sure the `Global` check box is marked and click the **Global** button.

   The Global Files dialog box will open.
3. If you do not want to rebuild the files that store information on the names and storage locations of your databases, leave `Database List` unchecked.

   **Example:** If you have changed security access for users, but have not added or changed any database names and locations, leave `Database List` unchecked.
4. If you do not want to rebuild the files that store information on global security, leave the `Security Data` check box unmarked

   **Example:** If you have added or deleted a database, but have not made any changes to security groups, leave `Security Data` unchecked.
5. Choose **OK**.

   The Global Files dialog box will close, returning you to the Rebuild dialog box.
6. Make any other necessary settings following the guidelines in To Run a Rebuild.
7. Choose **OK** to proceed with the rebuild.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Setting_a_Hold_Time_for_Rebuild)<<1} Setting a Hold Time for Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Database_Files)<<1} Rebuilding Database Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_User_Tables)<<1} Rebuilding User Tables.
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Floating_Files)<<1} Rebuilding Floating Files.
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Rebuilding User Tables

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

User Files store information that relates to a specific user and all databases used by that user. Lists of tagged records and documents created with the word processor are stored in user files.

If you have made changes in TeleMagic, a partial rebuild will allow you to quickly rebuild changed files. It is not intended to replace full rebuild. All files need to be periodically rebuilt to ensure maximum program efficiency. You should implement a regular rebuild schedule to rebuild your entire TeleMagic system, in addition to any quick partial rebuilds you run.

## To Do a Partial Rebuild of User Files:

1. From the **File** menu, select **Rebuild**.
2. Make sure the `User Tables` check box is marked and click the **User** button.

   The User Files dialog box will open.
3. If you do not want to rebuild the tags files, leave the `Tags` check box blank.
4. If you do not want to rebuild your list of user-specific word processing documents, leave the `Word Processor File List` check box blank.
5. Choose **OK**.

   The User Files dialog box will close, returning you to the Rebuild dialog box.
6. Make any other necessary settings following the guidelines in To Run a Rebuild.
7. Choose **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Setting_a_Hold_Time_for_Rebuild)<<1} Setting a Hold Time for Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Database_Files)<<1} Rebuilding Database Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Global_Files)<<1} Rebuilding Global Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Floating_Files)<<1} Rebuilding Floating Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Rebuilding Floating Files

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Floating Files are files which store information separate from, but related to, a contact database. Activities, user-defined list boxes, function keys, toolbars, and scripts are all saved in floating files.

This particular procedure will rebuild only items stored in the directory database. User-specific or global items will not be rebuilt.

If you have made changes in TeleMagic, a partial rebuild will allow you to quickly rebuild changed files. It is not intended to replace full rebuild. All files need to be periodically rebuilt to ensure maximum program efficiency. You should implement a regular rebuild schedule to rebuild your entire TeleMagic system, in addition to any quick partial rebuilds you run.

## To Perform a Partial Rebuild of Floating Files:

1. From the **File** menu, select **Rebuild**.
2. Make sure the `Floating` check box is marked and click the **Floating** button.

   The Floating Files dialog box will open.
3. Leave the check boxes blank for files you do not want to rebuild.

   **Example:** If you have added or deleted activities, but have not made any other changes, leave all blank but `Activities`.

**or** If you have created a new custom toolbar, but have made no other changes, leave all but `Tool Bar Config` blank.

4. Choose **OK**.

   The Floating Files dialog box will close, returning you to the Rebuild dialog box.
5. Make any other necessary settings following the guidelines in To Run a Rebuild.
6. Choose **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Setting_a_Hold_Time_for_Rebuild)<<1} Setting a Hold Time for Rebuild

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Database_Files)<<1} Rebuilding Database Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Global_Files)<<1} Rebuilding Global Files.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|

_____154.BMP<JumpId(TM.HLPï¿½UM1_User_Tables)<<1} Rebuilding User Tables.
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

## Rebuilding from Outside TeleMagic

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

Rebuilds from outside of TeleMagic should be performed by the system or TeleMagic administrator. See the *Troubleshooting* chapter of the *System Administrator Guide* for information about performing an external rebuild.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<CONTUP01.BMP| CONTDN01.BMP<JumpId(TM.HLPï¿½UM1_Running_a_Rebuild)<<1}

## Rebuilding User-defined Indexes

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

When you add and change indexes at the Indexes dialog box, there is an option to build those indexes. This option will only rebuild new and changed indexes. Additionally, you have the option to rebuild all indexes, whether changed or not, in database rebuild.

### Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_To_Rebuild_New_and_Changed_Indexes_Only)<<1} To Rebuild New and Changed Indexes Only:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_To_Rebuild_All_Indexes)<<1} To Rebuild All Indexes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1__Rebuilding_Data_Rebuild)<<1} Rebuilding Data (Rebuild)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# To Rebuild New and Changed Indexes Only:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

1. If you are running on a network, make sure all other users are out of the database(s) whose indexes you want to rebuild.

2. From the **Contact Manager** menu, select **Contact Utilities**, **Edit Indexes**.

   The Indexes selection box will open.

3. Make any necessary changes to the list of indexes.

4. Choose **Build Indexes**.

   A message will appear asking you to confirm your decision to rebuild the indexes.

5. Choose **Yes**.

   The indexes you have added or changed will be rebuilt. The Rebuild status box will display the progress of the rebuild.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_To_Rebuild_All_Indexes)<<1} To Rebuild All Indexes:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# To Rebuild All Indexes:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink( Maintenanceï¿½ ï¿½ ï¿½ )<<1}

The following set of steps will rebuild indexes only. If you want to rebuild other areas of TeleMagic, see the appropriate sections in the Rebuilding Data topic.

Access to the rebuild feature is subject to group security restrictions. For a rebuild to proceed, the TeleMagic user account running the rebuild must be a member of a TeleMagic security group that allows rebuilds. If it is not, the **Rebuild** option will be dimmed (unavailable) on the **File** menu. Contact your network or TeleMagic administrator for access.

1. If you are running on a network, make sure all other users are out of the database(s) whose indexes you want to rebuild.
2. From the **File** menu, select **Rebuild**.

   The Rebuild dialog box will appear.
3. Under `Files`, unmark all check boxes except `Database`.
4. Click the **Database** button.

   The Database Files dialog box will open.
5. Select the database(s) whose indexes you want to rebuild.
6. Leave all but the `Contact Data` check box blank.
7. If you only want to rebuild the indexes for one level of the selected database(s), mark the `Rebuild Level Only` check box and select the level from the drop-down list.
8. Click **OK**.

   You will return to the main Rebuild dialog box.
9. Under `Options:` select `Reindex`.
10. Click **OK** to proceed with the rebuild.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_To_Rebuild_New_and_Changed_Indexes_Only)<<1} To Rebuild New and Changed Indexes Only:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Importing Records From Another Program

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Importing_Records_From_Another_Program_Notes)<<1}

You can import data into your TeleMagic contact database and Activity Manager from other installations of TeleMagic, or any word processor, spreadsheet, or other database that is capable of exporting to common file formats.

Do not be afraid of experimenting with importing data! If you make backups before you start, you cannot harm any important data. Make notes, plan ahead, and try a few unimportant records before you tackle a 60,000-record mailing list. If you are using the network version of TeleMagic, your system administrator or your TeleMagic Reseller may be able to assist you.

Before you import, you must create an import format. An import format is a set of instructions that tell TeleMagic what to do with the file being imported. Creating the import format includes choosing which fields and records to import, and matching those fields to fields in your target TeleMagic database. In certain cases, you must also specify field length. You can save import formats to use again should you need to re-import from your original source. (This can be very useful if you receive data periodically, e.g., from a mailing list provider.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Before_an_Import_You_Will_Need_to_Decide_On)<<1} Before an Import, You Will Need to Decide On:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

# Before an Import, You Will Need to Decide:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEUP01.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Before_an_Import_You_Will_Need_to_Decide_On_Notes)<<1}

- The TeleMagic User ID you will use.

    If you are using a single-user copy of TeleMagic, you probably have not set up any security groups and can use whatever TeleMagic User ID you like.

    On a network, the User ID you use for importing must be a member of a TeleMagic security group that is allowed to perform imports. Make sure that your TeleMagic account can access the import function, or contact your system administrator.

- The location of your source data file.

    Be prepared to type the drive name, directory, and file name of the data you want to import. (You should be logged into your network if the data is stored there.)

- The structure of your target TeleMagic database.

    When performing an import, you will match the source data file (the file being imported) to the target database in TeleMagic. You should be very familiar with the structure and layout of your TeleMagic database before proceeding. This includes knowing what fields exist in the database, the length of the fields, and where they are located.

- The structure of your source data file.

    Most programs can export files to a format that TeleMagic can read, such as dBase III+, Delimited Format, or SDF (Standard Data Format). You will need to know which format is used by the file you will import. If you are not sure to which formats your source program can export, check your source program documentation or consult with someone familiar with data conversion.

- What fields and records are contained in the import file.

    Whatever records are in the file to be imported will be brought into TeleMagic. Controlling what records are imported is done at the time of export. If you want to limit the records in the incoming file, see your source program documentation for information on creating record groups prior to exporting from that program.

    You will, however, be able to selectively limit the fields that should be imported at the time of import, if you need to. Be sure you can recognize the field prompts, field names, or sample data for the data fields you want to import. A printed copy of the source file and the TeleMagic database (via a Database Structure report) can assist here.

- Which fields in your source file and target database you want to match.

    You will have to tell TeleMagic which field in the target database should contain the data from each field being imported. Once again, it is important to be familiar with the structure of both your target database and your source file. Specifically, you will need to make sure that the field types and lengths match.

    When you are matching fields in your source file to fields in TeleMagic, you should make sure that the data type is valid. For example, if you are importing a date, you will probably want to select a date field in TeleMagic to contain it. Similarly, you should not make a TeleMagic date field to contain character data. If there are any restrictions on the data that a TeleMagic field can contain, either from the field type or from the field's template, you should make sure that any data you will bring into that field is valid for it.

It is also important to make sure that the field lengths match. Before you import, you should make sure that your TeleMagic fields are long enough to accommodate the incoming data. If the data you import does not fit into the TeleMagic data fields to which you want to import, you will lose information during import. If necessary, you should adjust TeleMagic field lengths before you import. (If you will be changing TeleMagic fields, be aware that you will have to run a rebuild on the database prior to import.)

If you are importing in SDF format, it is critical that you know the lengths of the fields in your source file because you will have to specify those lengths when creating the import format. Even though TeleMagic allows you to view a sample record from the target file so you can check your field assignments, and even though you can try to determine the field lengths by examining the sample data at the time you are assigning fields, this process can be trickier than it sounds. If fields are empty (containing only spaces or non-printing characters) in the records you examine, you will probably conclude that there is nothing important there. Later records, however, might contain important data that you would therefore miss. It will help if you know the exact length of the fields before importing.

- The data field list order in your source data file.

  For non-TeleMagic or -dBase import formats, matching fields will be much easier if you know the order in which the original data is listed. Again, a printout of the source database's data structure or field list can help here.

- The record order in your source data file.

  This is particularly important when importing from a flat file (DBF, DLM, SDF, etc.) into more than one level of TeleMagic. In this case, records that will have the same parent *should be next to each other* in the import file. Take a look at the following scenario:

  You want to import two Level 2 (contact) records so that they have the same Level 1 (company) parent. If your record order is similar to Example 1 below, only one Level 1 record (for Joe's Imports) will be created; if it is similar to Example 2, *two* duplicate Level 1 records (for Joe's Imports) will be created.

**Example 1:**

| | **Level 1 Field** | **Level 2 Field** |
|---|---|---|
| **Record 1:** | "Joe's Imports", | "Joe Smith" |
| **Record 2:** | "Joe's Imports", | "Jane Smith" |
| **Record 3:** | "Widgets 'R Us", | "Steve Jones" |

**Example 2:**

| | **Level 1 Field** | **Level 2 Field** |
|---|---|---|
| **Record 1:** | "Joe's Imports", | "Joe Smith" |
| **Record 2:** | "Widgets 'R Us", | "Steve Jones" |
| **Record 3:** | "Joe's Imports", | "Jane Smith" |

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Maintaining_Import_Formats)<<1} Maintaining Import Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM2_Starting_an_Import)<<1} Starting an Import

## Source

In import, source refers to the data that is coming in. This can mean the database or application that originally contained the data, the file that contained the data before import, or a field of the actual data.

## Target

In import, target refers to the TeleMagic installation into which you are importing.

# Creating an Import Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

The TeleMagic import wizard will guide you through the process of creating an import for any file format. There are many possible choices available when creating a new import format, but only those relevant to the format being created will be presented. As you proceed through the process, you will be able to go back and change selections that you made in previous steps. If you do change earlier selections, any relevant choices that you made after the change will be retained so you do not have to make them again. However, depending on what you change, some choices may no longer be available.

As you follow this procedure, there will be several places where you will have to deviate from the main path of the procedure. In some cases, this will simply be a single topic that opens. When you have finished with the secondary topic, close the window and continue with the procedure. In other cases, you will jump to different locations in the procedure. When you jump within the procedure in this way, the step displayed at the top of the help window is the next step in the procedure.

**Warning!**

Do not copy import format files to other installations of TeleMagic. Create import formats at the location where they will be used.

1. If you will be importing contact records (as opposed to activity records only), open the TeleMagic contact database that you will be importing into.
2. From the **File** menu, select **Import**.

   The Import Formats selection box will open.
3. Choose **Add**.

   The TeleMagic Import Wizard will open.
4. Type a name for the new format in the field. This is the name that will appear in the Import Format selection box. Click **Next** when you have finished entering the name.

   The next step of the import wizard will open.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP02.BMP|NOTEDN02.BMP<JumpId(TM.HLP>

5. Select the import type and click **Next**. If you selected `Import using TeleMagic for Windows format` or `Import from a single dBase III file`, proceed to the next step.

hintsï¿½U_MX_Note_for_Step_5_d)<<1}

**or** Select from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Other_Import_File_Types)<<1} Other Import File Types

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_step_7)<<1} Import directly from a TeleMagic for DOS installation

6. Indicate whether you will be importing activity data only, or both activity data and contact data. Select the `Import Contact Records` radio button if you will be importing only contact data or both contact and activity data. Select `Import to the Activity Manager` if you will only be importing activity data. Click **Next** when you have made your selection.

7. In this step, locate the source files for the import. You can enter the path and file name directly in the field, or you can click the **Find** button and use the Select Directory dialog box to locate the file.

   You may have the option of creating an Express Import Format. This option will be available if you are importing from a DOS database, a single dBase **III** database, a TeleMagic for Windows format where you are only importing activities, or if you selected `Other import file types` in step 5.

   The express format accepts all defaults and is the fastest and simplest way to create a new format.

   If you are not creating an Express format and you are not creating a format to import TeleMagic for Windows activity records only, click **Next** and proceed to the next step.

**or** Choose from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_11)<<1} Continue creating an Import format for Activity Manager records

{ewc rhgbtn32.dll, BlueSkyHelpButton,

g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½Create_an_Import_Format_Step_20)<<1} Create an Express Import Format

8. You have the option of selectively importing records based on an expression. You can either enter the expression in the field directly, or you can click **Expression** and use the Expression Builder to create the expression. If you do not enter an expression, all otherwise valid records will be imported. You can clear the contents of the expression field by clicking **Clear**.

   When you have entered your expression, or if you are not using an expression, click **Next** to proceed. If you are importing contact data in any format, other than SDF, proceed to the next step.

   All others, proceed to the next step.

**or** Choose from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton,
g<_____153.bmp|
_____154.BMP<JumpId(TM.HLP>hintsï¿½U_MX_SDF_File_Parser)<<1} If you are creating an SDF Import Format

{ewc rhgbtn32.dll, BlueSkyHelpButton,
g<_____153.bmp|
_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_12)<<1} If you are creating an import format for Activity Manager records only

9. Match the target field, in the column on the left, with the source field. When you click in a field in the Assigned Field column, a drop-down list of available fields from the source file will open. Select the field that will be matched with the target field. When a source field has been matched with a target field, an “X” will appear next to its entry on this list. Source fields can be matched to any number of target fields.

   If you click the ellipsis button , the Expression Builder will open and you can create an expression to limit what is imported to each field.

   By clicking the **Field Name** button, which serves as the column header of the column containing the target fields, you can toggle how the field names are displayed; either field name only, or prompt and field name.

   By clicking the **Assigned Field** button, which serves as the column header for the column containing source fields, you can toggle what is displayed in this column; either field names, or sample data.

   You can automatically match fields in the source file with fields in the target file by clicking **Auto Assign**. The source field must have the same name as the target field to be automatically matched in this way. It is possible that incompatible fields will be matched. When this occurs,

the field will be indicated in red.
If you are viewing sample data in the source field column, you can scroll through the data present in the source database by clicking **Prev Sample** and **Next Sample**.
When you have matched the desired fields in the source file with fields in the target file, Click **Next** to continue. If you are creating an import format in TeleMagic for Windows format, continue to the next step in this procedure.

**Warning!**

If you are importing directly from TeleMagic for DOS and use an expression to limit what is imported into RCL fields, the dates must follow a specific format. For TeleMagic for DOS V14.5, that format is YYYY MM DD. For DOS versions prior to V14.5, the format is YY MM DD.

**or** Select from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_12)<<1} Continue creating an import format for dBase III, Relate separate databases, or any of the formats from the “Other import file types” list

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS1)<<1} Continue creating an import format for TeleMagic for DOS, V14 or later

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS5)<<1} Continue creating an import format for TeleMagic for DOS, prior to V14

10. You can choose to include activities with your import. If you do choose to include them, you can choose to import only linked activities, only unlinked activities, or both.

    **Do not include activities**

    Select this radio button if you do not want to include any activities.

    **Include linked activities only**

    Select this radio button to include only activities that are linked to records in the database being imported.

    **Include unlinked activities only**

    Select this radio button to include only activities that are not linked.

    **Include both**

    Select this radio button to include all activities.

    **Warning!**

    If you are importing directly from a TeleMagic for

Windows installation, rather than from a database which has been exported, you must copy the ACTIVITY.DBF file to the same directory as your contact database files. This is accomplished automatically when importing a database that has been exported. The ACTIVITY.DBF file is located in the \TM4\COMMON directory in V4. It is located in the \TMWIN directory in versions prior to V4.

When you have made your selection click **Next**. If you have chosen to include activities in your import, proceed to the next step in this procedure.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_12)<<1} Do not include activities in this format

11. You can choose to limit which activities are imported based on date. No activity with a date earlier than the first date field will be included in the import. Similarly, no activity with a date later than that entered in the second field will be included. If you enter dates in both fields, then activities dated within that range will be included. If only the first field is filled-in, then only activities more recent than the indicated date will be included. If only the second field is filled-in, then only activities with earlier dates than that indicated will be included. Leave both fields blank to import all otherwise valid activities.

    When you have made your selection, click **Next** to proceed. If you chose to include linked activities only, proceed to the next step.

**or** Select from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_AM1)<<1} If you will be importing Activity Manager records exclusively, or your import includes unlinked activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS4)<<1} If you are creating a TeleMagic for DOS import format

12. You can choose to create an import format which can be performed while other users are in the target database, or you can choose to require that the import only be run while one user has exclusive use of the target database. The advantage of the single-user option is that the import will be faster. The advantage of the multi-user option is that it does not require exclusive use of the database, and may be more flexible.

    Select the radio button corresponding to your choice of import format and click **Next** to continue.

If you are importing contact records, proceed to the next step.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½Create_an_Import_Format_Step_20)<<1} Continue creating an import format for Activity Manager Records

13 It is possible that incoming data will not be valid in the target database if the target database uses validation based on list boxes or expressions. Select what action to take in the event that incoming data does not meet validation requirements:

**Ignore the validations and import the data anyway**

Select this ignore validations.

**Reject the entire record if any field fails validation**

When you choose this option, records containing one or more fields which do not meet validation requirements will be rejected. Rejected records will be added to a new file, REJECT.DBF, where they can be reviewed after the import is complete.

**Import the record, but skip invalid fields**

Choose this option to only reject data which fails validation. Data rejected in this way can be added to a memo field.

This option will have no effect if the target database does not validate any fields.

Click **Next** to continue. If you chose either to Ignore Validations, or to Reject the Entire ;Record, proceed to the next step.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Select_Memo_Fields_to_Contain_Rejected_Data)<<1} If you are rejecting invalid fields

14. Choose what action to take when a record being imported is a duplicate of a record already in the target database.

**Create a new record anyway**

Select this radio button to add the duplicate record to the target database.

**Merge with existing record**

When this radio button is selected, data from the incoming record will be merged with the existing record according to rules which you will establish later in this procedure.

**Reject incoming record**

Select this option to reject the incoming duplicate record.

Click **Next** when you have chosen the required action.

If you chose to either reject the incoming duplicates, or merge the incoming duplicates, proceed to the next step.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import _Format_Step_17)<<1} If you are creating new records and you chose single-user mode in step 12

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import _Format_Step_18)<<1} If you are creating new records and you chose multi-user mode in step 12

15. Select how TeleMagic will determine which records are duplicates.

**Use all existing indexes in TeleMagic used for “duplicate record checking”**

Select this radio button to use all existing indexes in the target database which have the Duplicate Record Checking option marked.

**Select an Individual existing index**

You will be able to select an index for each level being imported when you select this option.

**Create a new, temporary index**

This option will allow you to create an index expression for each level being imported.

When you have made your selection, click **Next** to continue. If you chose to create a new, temporary index, proceed to the next step.

**or** Select from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import _Format_Step_FR1)<<1} If you will be merging duplicate records and you chose the “Use all existing indexes…” option.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import _Format_Step_17)<<1} If you will be rejecting duplicate records and you chose the “Use all existing indexes…” option.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp| _____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import _Format_Step_IS1)<<1} If your chosen action will be based on a single, existing index

16. Enter the expression for each level in the fields as indicated. Click the **Expression** button for the level indicated to open the Expression Builder and create a logical expression. You can clear the expression by clicking the **Clear** button associated with the level whose expression you want to clear. When the expression is evaluated, if the resulting value is equivalent to the same value in any existing record, the record will be either merged or rejected, depending on the choice you made in step 14. You must create an expression for each level you will be importing.

    When you have created the expression(s), click **Next** to proceed. If you chose to reject records in step 14, and you selected single-user mode in step12, proceed to the next step.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_FR1)<<1} If you will be merging duplicates

17. Select when to update your indexes. If you choose to update indexes during the import, the import will take longer. If you choose to update the indexes after the rebuild, then the indexes will not be updated until a rebuild is performed.

    Updating the indexes during the import requires longer. The larger the database being imported, the longer the import will require. It is recommended that the index update be updated after the import for larger databases.

    The specific merits of one method over the other will depend, in part, on user requirements and the capacity of the hardware running the import.

    When you have made your choice, click **Next**. Proceed to the next step

18. You can choose to update calculated fields during the import. If you choose to do so, the import will take longer. If you choose not to do so, the fields will not be up-to-date until the database is recalculated.

    You can also choose to update the Last Revision field as part of the import. If you use this option, the Last Revision field in any record which is added or merged will contain the date and time of the import after the import is completed. If this option is not chosen, the date and time of the import will be entered in blank Last Revision fields of records which are added or merged as part of the import.

    When you have made the selections available on this step, click **Next** to continue. Proceed to the next step.

19. You can stamp the notepad with the date, time, and user

ID of the person performing the import. If you choose this option, the text field will become available and you can enter any other text that you would like to include in the stamp. Any text that you include must be enclosed in quotation marks.

Click **Next** to proceed. Continue to the next step.

20. Enter the number of records that should be processed before updating the progress indicator. If you select 0, the progress indicator will not be updated. Otherwise, the lower the number, the more frequently the progress indicator will be updated. The more frequently the progress indicator is updated, the slower the import will progress.

    This is the final step of the procedure. When you are satisfied, click **Finish** and the new import format will be created.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Starting_an_Import)<<1} Starting an Import

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Maintaining_Import_Formats)<<1} Maintaining Import Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

DO S 1 Choose whether you will be including activities in your import. If you choose to include activities, you can choose to filter the activities based on whether or not they are linked. You can import either linked activities, unlinked activities, or both. Select the radio button corresponding to your choice.

Click **Next** when you have made your choices.

If you chose not to include activities, proceed to the next step.

**or** Select from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS6)<<1} Create a TeleMagic for DOS import format which includes unlinked (personal) activities

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS8)<<1} Create a TeleMagic for DOS import format which includes only linked activities

DOS2 You have the option of creating completed activities based on your Call History file. Mark the checkbox if you would like to create these activities.

If you chose to create activities based on your Call History file, you will need to locate the Call History file. The default path will be the same as for your source file. If this is not correct, enter the correct path in the field. You can either enter the path directly, or you can click **Find** and use the Select Directory dialog box to browse for the file.

Click **Next** when you are ready to continue. Proceed with the next step in this procedure.

- DOS 3 Recall activities can be created in the Activity Manager based on your TeleMagic for DOS RCL field. Mark the checkbox if you would like to create recall activities.

If you chose to create recall activities, enter the duration for the activities in the field indicated.

If you chose to create recall activities, you can choose to assign them all to one user, or you can create an expression to assign them to other users. Click **Expression** to open the Expression Builder and create the expression. You can clear the expression by clicking **Clear**.

Click **Next** to proceed.

Continue to the next step in this procedure if you are NOT including activities, you are NOT creating completed activities based on the Call History file, AND you are NOT creating recall activities based on your DOS RCL fields.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_11)<<1} Continue creating an import format which either includes activities, will create completed activities based on the Call History file, or creates recall activities based on the DOS RCL field, or does any combination of these.

DOS 4 Select whether to import filters, indexes, and/or list boxes. Pay close attention to the description on the screen concerning the conditions under which each will be either imported or not.

Click **Next** to continue.

If you are including activities with your TeleMagic for DOS import, proceed to the next step.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_12)<<1} If you are not including activities in your TeleMagic for DOS import

DOS 9 Choose the level where linked activities will be attached from the drop-down list. If applicable, select the user in your target installation to whom any unmatched activities will be assigned.

Click **Next** to proceed

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_12)<<1} Procede to the next step

DOS 5 Choose whether to include activities with your import.

Click **Next** when you are ready to continue.

If you chose to include activities, proceed to the next step in this procedure.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS2)<<1} Create a TeleMagic for DOS Import Format Without Activities

DOS 6 You can choose to include all unlinked (personal) activities with the import, or you can restrict the import to selected users in your TeleMagic V4 installation. Select the radio button reflecting your choice.

If you chose to import activities for only certain users, you must identify those users. Highlight the name of the user whose activities are to be included in the `Available Users` field and click **Add**. You can add all of the available users by clicking **Add All**.

You can remove users from the `Selected Users` field by highlighting the user and clicking **Remove**. You can remove all of the users from the `Selected Users` field by clicking **Remove All**.

Click **Next** when you are ready to continue.

Proceed to the next step in this procedure if you are creating an import format for TeleMagic for DOS prior to V14.

**or** {ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS8)<<1} Create an import format for TeleMagic for DOS, V14 or later

DOS 7 Enter the path to your TMAPPTS.DBF file. The location of your contact files is entered by default. If this is incorrect, you can either enter the correct path directly, or you can click **Find** and browse for the correct location.

Click **Next** to continue

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS2)<<1} Proceed to the next step

DOS 8 Locate the TMACMAST.DBF file. You can either enter the path directly, or you can click **Find** and browse for it using the Select Directory dialog box.

Click **Next** to continue

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_DOS2)<<1} Proceed to the next step

AM 1 You can choose to import all unlinked activities, or only those belonging to certain users. Choose the radio button which indicates your choice.

If you choose to only import activities for certain users, you must choose which users' activities are to be imported. To select a user, click on the user name in the `Available Users` field. Click **Add** to move the selected user to the `Selected Users` field. You can also click **Add All** to include all users on the list. To remove users from the `Selected Users` field, highlight the user name in the `Selected Users` field and click **Remove**. You can remove all of the users in the `Selected Users` field by clicking **Remove All**.

When you have made your selections, click **Next** to proceed.

Choose from the following to go to the next step in this procedure:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Step_8)<<1} Importing Activity Manager Records Only

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|______154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_12)<<1} Importing Contact Records and Unlinked Activities

RD B 1 All of the files that will be imported into your TeleMagic database must be located in the same directory. Enter the path to that directory in the first field. You can enter the path directly, or you can click **Find** and browse for the file location using the Select Directory dialog box.

The remaining fields will be used to identify which file should be imported to each level. Click the arrow button in each field to open a drop-down list of the available files. Select the file for each level from the drop-down list. You must identify files for levels 1 and 2. Level 3 is optional.

When you have entered the required information, click **Next** to proceed. Continue to the next step in this procedure.

- RD B 2 Determine how relationships are to be established. First, decide what criteria will be used to determine that a level 1 record is unique. For example, you may have a database where company data is contained on level 1. In this case, Company Name would be a unique identifier if you had one record for each company and each company had a unique name. You probably would not use data like the city or state where the company is located as a means of identifying a unique parent record. You could, however, use location information as part of an expression. Click the ellipsis button • to open the Expression Builder and create an expression which will identify unique parents.

Next, decide what data in the file to be imported to level 2 will be used to relate each record to its level 1 parent. This must be identical to the data used to identify the level 1 records as unique parent records. For example, if the level 1 records are identified as unique based on Company Name, then there must be some indication of Company Name in the records to be imported to level 2. There does not need to be a field which contains that exact information. You can, for example, create an expression to extract the information from a field which contains that information as well as other information.

Next, determine how to identify level 2 records as unique parents. The same rules apply as for determining which level 1 records are unique parents. This data does not have to be related to the data used to relate level 1 parents to their level 2 children. It will be used in the same manner as the level 1 identifier to relate level 2 parents to their level 3 children.

Finally, select identify the data on level 3 which will identify each record as a child of a particular level 2 record. The same requirements apply as for the relationship identifier for level 2 records to their level 1 parents. That is, the information must be identical to the data identified as the level 2 identifier. As with the other data required, this information can be determined by an expression.

When you have finished identifying the criteria for determining relationships in your database, click **Next**.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Step_8)<<1} Continue with Procedure

FR 1 Select the field rule to be applied to each field in the target database. Each field’s rule is selected individually. Not all rules are available for all field types. The following rules are available:

**Always Replace**

This is the default rule for all fields. When records are merged and this rule is selected, the imported data will replace the data in the target database.

**Replace if source is not blank**

This rule will cause the data in the target field to be replaced in all cases except where doing so would result in a blank field.

**Only replace if target is blank**

This rule will cause the data to be imported only if there is nothing in the target field.

**Insert at beginning of existing data**

The imported data will always be inserted at the beginning of the data in the target field.

**Append to the end of existing data**

The imported data will always be appended to the end of the existing data in the target field

**Sum of new and existing numeric data**

The source and target data will be added together

**Merge list data**

The lists will be combined and arranged in alphabetical order. Any duplicate members of the resulting list will be eliminated.

**Never Replace**

The data in the target field will remain in all cases.

Click **Next** to proceed

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_17)<<1} Proceed to the next step in this procedure

IS1 Select an index for each level of the target database. When the data in the selected index fields match, either the record being imported will be merged, or it will be rejected, depending on the choice you made in step 14.

Select from the following:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_FR1)<<1} If you will be merging duplicates

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½Creating_an_Import_Format_Step_17)<<1} If you will be rejecting duplicates

## Starting an Import

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

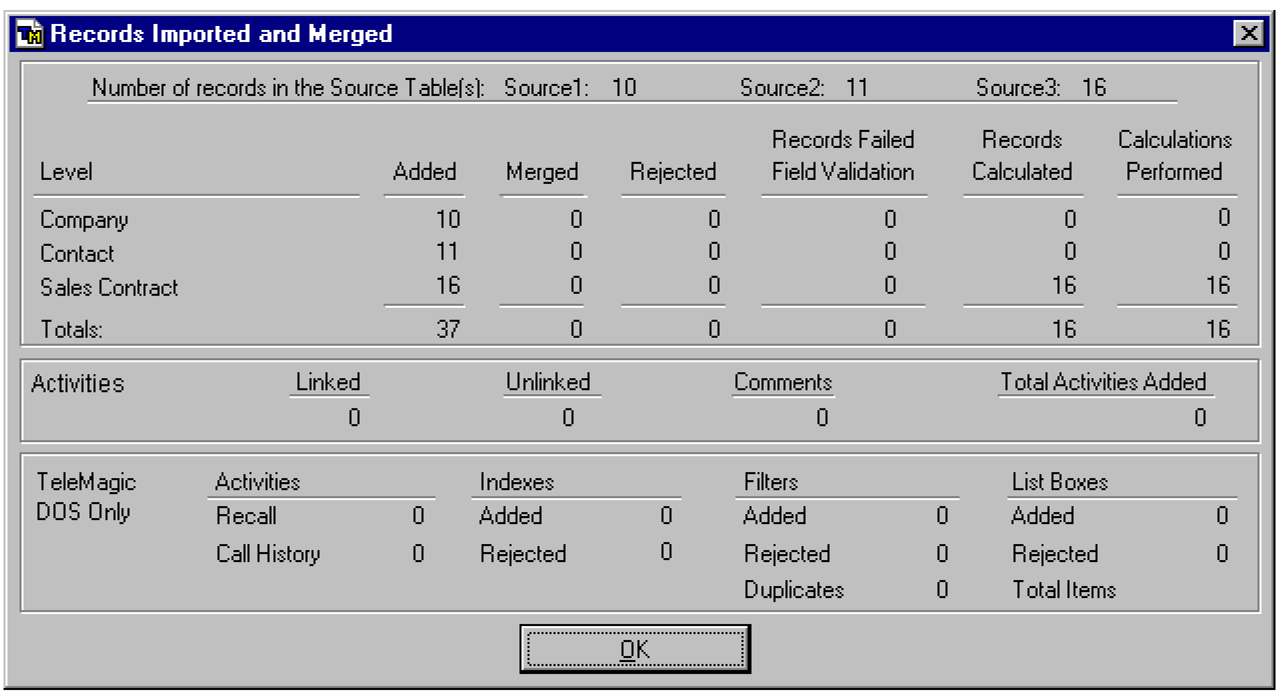
We recommend that you test your import format for the first time using a copy of your database, rather than importing into a database with “live” data. If the format is somehow incorrect, you can simply delete all of the records in the database and start over. If you import into a database with existing records, even if you have used the import format successfully in the past, make sure you have a complete backup of your databases before performing an import. If your import is somehow incorrect, you can restore the backup and perform the import again. (See Data Backup at the beginning of this section for more information.)

### To Import Records From Another Program:

1. Open the TeleMagic database you want to import records into.
2. From the **File** menu, select **Import**.

   The Import Formats selection box will open.
3. Select the import format you want to run.
4. Click **Run**.

   The Records Imported and Merged dialog box will appear showing you the status of the import:




**Sample Records Imported Dialog Box for Contact Based Import**

**or** For activity based import, the following will appear:


**Sample Records Imported Dialog Box for Activity Based Import**

Once the import is complete, the Records Imported and Merged or Activity Import dialog box will be updated, and the OK button will appear on the screen:

7. Click **OK**.

   You will be returned to the Import Formats selection box.

8. Click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Troubleshooting_After_an_Import)<<1} Troubleshooting After an Import
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Maintaining_Import_Formats)<<1} Maintaining Import Formats
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Maintaining Import Formats

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

## Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_To_Change_or_Copy_an_Import_Format)<<1} To Change or Copy an Import Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_To_Delete_an_Import_Format)<<1} To Delete an Import Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Starting_an_Import)<<1} Starting an Import

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Troubleshooting_After_an_Import)<<1} Troubleshooting After an Import

# To Change or Copy an Import Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

1. Open the TeleMagic database containing the import format you want to change.

2. From the **File** menu, select **Import**.

   The Import Formats selection box will open.

3. Select an import format.

4. Click **Change**.

**or** If you want to keep your existing Import Format and make the changes to a copy, click **Copy**.

   The Import dialog box will open. If you selected **Copy**, you will be looking at a copy of the original import format.

5. Make corrections as necessary, then click **OK**.

   The Import dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_To_Delete_an_Import_Format)<<1} To Delete an Import Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Starting_an_Import)<<1} Starting an Import

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Troubleshooting_After_an_Import)<<1} Troubleshooting After an Import

## To Delete an Import Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

1. Open the database containing the import format you want to delete and select **Import** from the **File** menu.

   The Import Formats selection box will open.

2. Highlight the import format you want to delete.

3. Choose **Delete**.

   A confirmation pop-up will appear.

4. Choose **Yes** to remove the import format.

   This option will only delete the import format. The default file being referenced in the import format will not be affected.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_To_Change_or_Copy_an_Import_Format)<<1} To Change or Copy an Import Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Starting_an_Import)<<1} Starting an Import

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Troubleshooting_After_an_Import)<<1} Troubleshooting After an Import

## Troubleshooting After an Import

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

Should you discover that data did not import correctly, do the following to troubleshoot the problem:

Reread the introduction to the import section: Importing Records From Another Program. and Before an Import, You Will Need to Decide On:   Make sure that you took any precautions mentioned there.

If you enabled the `Keep Rejected Data` feature, one or more files will have been created in your user directory. The file(s) will be named REJECT and have an extension compatible with your export type. (For example, if you were exporting a delimited file, the rejected file will be named REJECT.DLM.)   You may find it helpful to review this file to see what sort of data were rejected. If you have a utility that is able to open this file, you may view the data that were rejected directly. If you are unable to open the file, create a blank copy of your database and import the REJECT.* file(s). (You can use the same import format that was used to originally; simply change the file name and path. Make sure that validation is turned off in the copied database.)

If the data do not appear to have been imported correctly in the Contact Manager, try viewing the records in Contact Browse. If it appears to display correctly in Browse, it is probable that the template for the fields in TeleMagic is not formatted correctly to contain the data being imported. (Review the note regarding the `Don't save literal characters with the data` option in the Creating Templates for Phone Number Fields topic for information on how your template will affect an import.)

If there was a problem with the import, restore the backup of the database or, if you imported into a blank database, perform a group delete on the imported records (if you delete from Level 1, all child records will also be deleted), correct the problem, and perform the import again.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½U_M2_Creating_an_Import_Format)<<1} Creating an Import Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Maintaining_Import_Formats)<<1} Maintaining Import Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Starting_an_Import)<<1} Starting an Import

# Importing DOS Recalls

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Importingï¿½ ï¿½ ï¿½ )<<1}

When importing from the DOS version of TeleMagic, activities can be created from the data contained in the recall field in the DOS version. For each recall in the DOS version, an incomplete activity with an alarm is created in the Windows version. For this reason, it is a good idea to change the recall date in the DOS version before running the import.

When creating activities from the DOS RCL field, an incomplete activity with an alarm for every record that has a recall set will be created. If their DOS installation is, for example, 10 years old, they'll end up with alarms from 1989.

## To Replace the Recall Field:

1. Perform a complete backup of your DOS TeleMagic installation.
2. Run TeleMagic.
3. From the main menu, select **Filters**.
4. Press the **A** key.
5. Enter a three-character filter ID.

   **Example:** RPL
6. Enter a description for the filter in the Description field.

   **Example:** Recalls older than 1/1/1999
7. In the **Field name** field, enter RCL,1.
8. In the **Compares** field, enter LT.
9. In the **To this** field, enter 1999.
10. Press the F10 key twice.

    The new filter will be saved and you will be returned to the main menu with that filter in use.

11 From the main menu, select **Other options**.

12. From the Other Options menu, select **Database utilities**.
13. From the Database Utility menu, select **Replace in filtered records**.

    The `Change this database field:` box will default to RCL.
14. Press Enter.

    A message will appear informing you that the RCL field is an index key and that a rebuild will be performed.
15. Press the Y key.

16. In the `To look like this:` field, enter an ampersand (&), then a future date in quotation marks.

    **Example:** &"12-31-2005"

17. Press the Enter key.
18. Press the Y key.

    The Printing Menu will appear.

19. To print a report of the records which are changed, select Proceed with printing. To view the report, select Send to screen.

**Warning!**
When creating the import format, you will have the option of limiting what is imported into RCL fields by using an expression. If you choose to use this option, dates in the expression must follow specific formats. If you are importing from TeleMagic for DOS V14.5, that format is YYYY MM DD. If you are importing from earlier versions of TeleMagic for DOS, the format is YY MM DD.

# Exporting Records

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

Access to the record export function is subject to group security restrictions. Before an export can proceed, the TeleMagic user account running must be a member of a TeleMagic security group that allows exports. If it is not, the **Export** option will be dimmed (unavailable) on the **File** menu. If your account is denied access to the export function, it is likely you are not a member of a TeleMagic security group that is allowed to perform them. Contact your network or TeleMagic administrator for access.

You can export data from your TeleMagic contact database and Activity Manager to files that can then be imported into word processors, spreadsheets, and other databases. During export, TeleMagic converts your data to a file format that another program can read.

TeleMagic allows you full flexibility during export. You create an export format that allows you to choose the export file type, choose which records to export, rename fields and determine record sort order. Once an export format has been created, it can be used repeatedly as new records are added to the database.

Do not confuse export with the Database Copy feature. Copying a database makes an exact copy, including the database template. The copied database can then be opened directly from the current installation of TeleMagic. A copied database cannot be imported into other applications or installations of TeleMagic. Export, on the other hand, copies the records out of TeleMagic and places them in a file. None of the database structure is included in an export and the file cannot be accessed directly from the current installation of TeleMagic. The export file can, however, be imported back into any installation of TeleMagic or into another application. (If you simply want to make a copy of an existing TeleMagic database, use the **Copy** command on the Select Database dialog box. You can access this by choosing **Select Database** from the **File** menu.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Before_an_Export_You_Will_Need_to_Decide_On)<<1} Before an Export, You Will Need to Decide On:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM2_Importing_Records_From_Another_Program)<<1} Importing Records From Another Program

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

## Before an Export, You Will Need to Decide:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

- Where you want to store the exported data.

  Be prepared to type the drive name, directory, and file name where you want to store the exported records. If the data will be stored on a network, you should have access to the appropriate drive and directory.

  Some export formats create multiple files. Consider creating an empty directory to contain your exported file. This will allow you to readily identify the necessary files when preparing to import them into the target application.

- Which file formats your target program can read.

  Almost any program can read files written in one of TeleMagic's export formats. If you are not sure which formats your target program can read, check your target program documentation for instructions on how to import files into that program.

  You may need a third-party data conversion program if your target program does not accept any of the export formats supported by TeleMagic.

- Which records you want to export.

  You may want to export only some of your records, using filters. You will be able to select any existing filter when creating your export format. If there is not an existing filter that defines the group of records you want to use, you must create one prior to accessing the Export feature. (See Creating Filters for information on creating filters.) If you plan to export regularly, make sure you have a strategy to only export new (not previously exported) records.

- What data (what fields) you want to export.

  You may want to export data from specific fields. Be sure you can recognize the field prompts or field names for the data fields you want to export.

  Take care to only export data intentionally. You should be careful not to export sensitive information, like manufacturing costs, accidentally.

- The size of export fields.

  It is often helpful to know the field lengths in the exported file when importing that file into another application. If you do not correctly match your exported fields to the target fields, data in the fields may be lost.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records)<<1} Exporting Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1}

Exporting Records Using Existing Export Formats
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Creating New Export Formats

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

Creating a new export format entails entering a name and location for the file that will be created, selecting the filter and index for records to be exported, specifying the export file format, and selecting which fields need to be exported. While none of these steps is particularly complicated, it will facilitate the process considerably if you have decided on the particulars of the export before proceeding. Review the section Before an Export You Will Need to Decide On for helpful information when preparing to create an export format.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_a_TeleMagic_for_Windows_Export_Format)<<1} Creating a TeleMagic for Windows Export Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_a_dBase_III_Export_Format)<<1} Creating a dBase III Export Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_a_Delimited_Text_Export_Format)<<1} Creating a Delimited Text Export Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_a_Standard_Data_Format_Export_Format)<<1} Creating a Standard Data Format Export Format

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½UM3_Exporting_Records)<<1} Exporting Records

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Before_an_Export_You_Will_Need_to_Decide_On)<<1} Before an Export, You Will Need to Decide On:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Creating a TeleMagic for Windows Export Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

The TeleMagic for Windows export format allows you to create a format that can very easily be imported into another installation of TeleMagic for Windows, or even into a different database in the current installation. If you are exporting contact records, you will have the additional option of exporting linked activity records and maintaining the link when the records are imported back into TeleMagic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Create_a_TeleMagic_for_Windows_Export_Format)<<1} To Create a TeleMagic for Windows Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Export_Activities_to_TeleMagic_for_Windows_Format)<<1} To Export Activities to TeleMagic for Windows Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Before_an_Export_You_Will_Need_to_Decide_On)<<1} Before an Export, You Will Need to Decide On:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# To Create a TeleMagic for Windows Export Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

1. Open the database containing the records you want to export and select **Export** from the **File** menu.

   The Export Formats selection box will open.

2. Choose **Add**.

   The Export Format dialog box will open.

3. Type a description of the format in the `Export format name` field.

   TeleMagic will add this description to the Export Format selection box for future use.

4. Type the complete path and file name for your exported records in the `Output file name:` field. The path should be an existing path on your PC or network. The file name should be for a new file that TeleMagic will create on export. (If you do not want an existing file to be overwritten, you should enter a file name that does not already exist.)

   The file name must end with the numeral 1, and it must have a *lowercase* .dbf extension.

   **Example:** EXPORT1.dbf

5. Select `Contact Data` (for contact database records) from the `Export from:` drop-down list.

6. Select a filter for the records from the `Filter` drop-down list. Only records that meet the filter criteria will be included in the export. If you want to export all records, choose `None - All records available`.

7. Select `TeleMagic for Windows` from the `Export file type` radio buttons, if it is not already selected:

8. To include TeleMagic activities along with the contact records, click **Options**.

   The Activity Options Dialog Box will open.

9. To include activities along with the contact records in the export, mark `Include Activities`.

10. To export only linked activities, select the `Linked Activities` radio button.

**or** To export only unlinked activities, select the `Unlinked Activities` radio button.

**or** To export both linked and unlinked activities, select the

`All Activities` radio button.

11. To limit the activities to those that fall within a specific date range, mark the `Date Range` check box and enter the start and end dates in the `From:` and `To:` fields.

    If you selected `Unlinked Activities` or `All Activities` in step 10, above, you will have the option of exporting activities assigned to all users, or an individual user.

12. If you want personal activities exported for all users, select the `All Users` radio button.

**or** If you want to only export personal activities for a specific user, select `Individual User` and select the user from the drop-down list.

13. When satisfied with your selections, click **OK**.

    You will return to the Export Format dialog box.

14. Choose **Select Fields**.

    The Choose Fields to Export dialog box will open.

    The list on the left will include all fields in the current database.

15. Select the first field you want to export from the list on the left, then choose **Add**. The field will be added to the right-hand side, indicating it will be exported. Repeat this for each field you want to add. If you select a field in error, highlight it on the list on the right and click **Remove**. It will disappear from the right-hand list.

- **or** Choose **Add All** if you want to export data from all fields.

    TeleMagic will copy the field(s) you select to the list on the right in the order you select them.

    Fields will be placed into the exported file in the order they appear on this list. You may want to adjust the field order to make it easier to work the exported file later.

- 16. To adjust field order, select any field and drag its positioning arrow up or down as required.

17. When you have finished selecting and ordering fields for export, choose **OK**.

**or** If you want to abandon your selections, choose **Cancel**.

    You will be returned to the Export Format dialog box.

- 18. Choose **OK** to save your work.

**or** If you want to abandon your changes, choose **Cancel**. All work on this new export format will be discarded.

    The Export Format dialog box will close. The export

format name will appear in the Export Formats selection
box, ready for use.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Export_Activities_to_TeleMagic_for_Windows_Format)<
<1} To Export Activities to TeleMagic for Windows Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1}
Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# To Export Activities to TeleMagic for Windows Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

This set of instructions will create a format to export the entire activity table that is stored in your global TeleMagic directory. You may also include activities when you are exporting contact records. This has the added advantage of allowing you to export activities that are linked to contact records and retain those links. See the instructions To Create a TeleMagic for Windows Export Format for details.

1. From the **File** menu, select **Export**.

   The Export Formats selection box will open.

2. Choose **Add**.

   The Export Format dialog box will open.

3. Type a description of the format in the `Export format name` field.

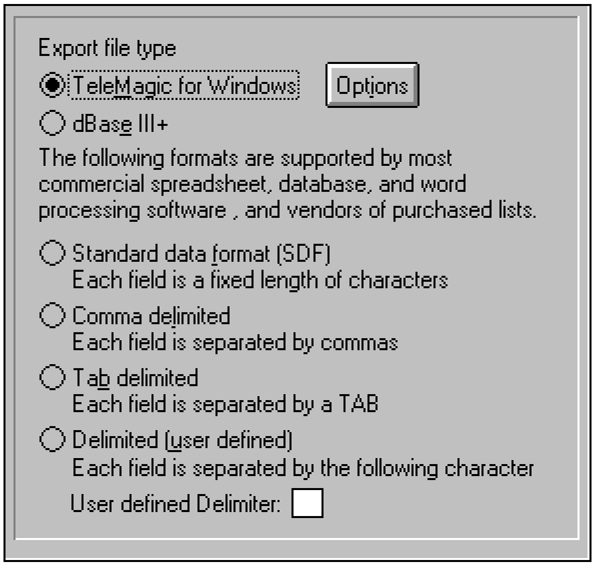
   TeleMagic will add this description to the Export Formats selection box for future use.

4. Type the complete path and file name for your exported records in the `Output file name:` field. (The path should be an existing path on your PC or network.) The file name must be ACTIVITY.DBF for TeleMagic to recognize it.

**WARNING!**
Make sure the path to the export file does not point to an existing TeleMagic installation.

5. Select `Activities` (for Activity Manager records) from the `Export from:` list.

6. Select `TeleMagic for Windows` from the `Export file type` radio buttons.




- 7. Choose **OK**.

  You will be returned to the Export Formats selection box with the new format appearing on the list.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Create_a_TeleMagic_for_Windows_Export_Format)<<1} To Create a TeleMagic for Windows Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Creating a dBase III+ Export Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Hint_for_Creating_a_dBase_III_Export_Format)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

Many programs support dBase III-type records. The emerging Xbase standard (which programs are starting to reference) is based on dBase. This format is also recommended if you will be importing the exported files into TeleMagic for DOS. If you plan to export from a relational structure to a flat file structure, you will follow the steps below.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Create_a_dBase_III_Export_Format)<<1} To Create a dBase III+ Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Export_Activities_to_dBase_III_Format)<<1} To Export Activities to dBase III+ Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Before_an_Export_You_Will_Need_to_Decide_On)<<1} Before an Export, You Will Need to Decide On:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Creating a dBase III+ Export Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

## To Create a dBase III+ Export Format:

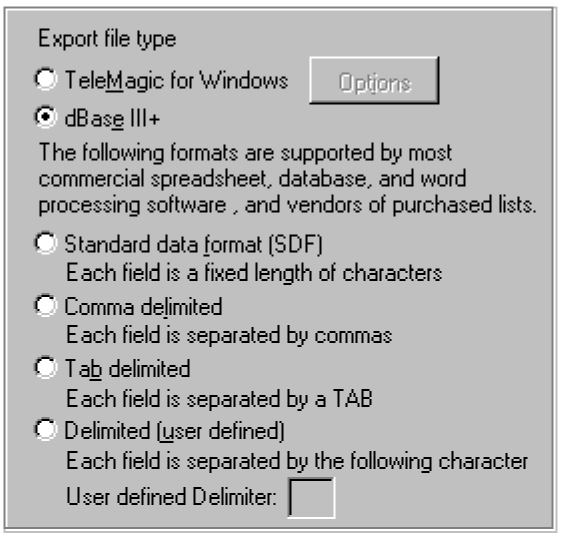
1. Open the database containing the records you want to export and select **Export** from the **File** menu.

   The Export Formats selection box will open.

2. Choose **Add**.

   The Export Format dialog box will open.

3. From the right side of the screen, select `dBase III+` from the `Export file type` radio buttons:




4. Type a description of the format in the `Export format name` field.

   TeleMagic will add this description to the Export Format selection box for future use.

5. Type the complete path and file name for your exported records in the `Output file name:` field. The path should be an existing path on your PC or network. (If you do not enter a path, the file will be placed in the current database directory.) The file name should be for a new file that TeleMagic will create on export.

6. From the `Export from:` list, select the database level containing the records you want to export. (You will be able to export records from the selected level and above. In other words, if you select Level 2, you will be able to choose fields from Levels 1 and 2, but not 3.)

7. Select an index from the `Index` drop-down list. If you do not care in what order the records are sorted after export, select `None`.

   Remember that your target program can probably re-sort the data after it is imported there, so your decision may not be critical.

- 8. If you want to limit the records exported to a filtered group of records, select the filter from the `Filter` drop-down list. The list will contain all filters already existing in this database. If you want to export all records, choose `None - All Records Available`.

9. Choose **Select Fields**.

   The Choose Fields to Export dialog box will open.

10. Select the first field you want to export from the list on the left, then choose **Add**. The field will be added to the right-hand side, indicating it will be exported. Repeat this for each field you want to add. If you select a field in error, highlight it on the list on the right and click **Remove**. It will disappear from the right-hand list.

- **or** Choose **Add All** if you want to export data from all fields.

   TeleMagic will copy the field(s) you select to the list on the right in the order you selected them.

   The fields will be exported in the order they appear on this list. When importing the exported file into some applications, the list of fields must be in a particular order. You may adjust the order in which fields are exported, if necessary.

- 11. To adjust the output field order, select any field and drag its positioning arrow up or down as required.

12. When you have finished selecting and ordering fields for export, choose **OK**. (If you want to abandon your selections, choose **Cancel**.)

   TeleMagic will automatically assign output field names based on the original field name. If the same field name is used on more than one level, the output field name may be duplicated. In this case you will get a Field Assignment Error warning informing you that there are duplicate field assignments.

13. If the Field Assignment Error warning does not appear and you do not want to manually adjust any of your field assignments, skip to step 19.

**or** If you do not receive a Field Assignment Error message, but want to check or adjust the automatic field assignments, click **Assign Fields** and skip to step 16.

**or** If you receive the Field Assignment Error warning, click **OK**.

The Export - Assign Output Field Names dialog box will appear.

A message will appear informing you of where the duplication is.

14. Click **OK** to acknowledge the message.

    The duplicate field assignment will be highlighted and the current assigned field name will appear in the `New Field Assignment:` field.

15. Enter a new assignment for the duplicate field in the `New Field Assignment:` field and press ENTER.

    The Duplicate Field warning will appear for each duplicated field until all have been resolved.

16. If you want to change the assignment of any other fields, double-click on the field and enter the new field assignment in the `New Field Assignment:` field. Press ENTER to save the new field assignment.

17. When you are satisfied with the assignments, click **Close**.

18. Edit the field assignments as necessary, following the instructions in step 15, and click **OK** when you are satisfied with your assignments.

    TeleMagic will return to the Export Format dialog box.

19. Choose **OK**.

    The Export Format dialog box will close. The export format name will appear in the Export Format selection box, ready to be used.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Export_Activities_to_dBase_III_Format)<<1} To Export Activities to dBase III+ Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# To Export Activities to dBase III+ Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

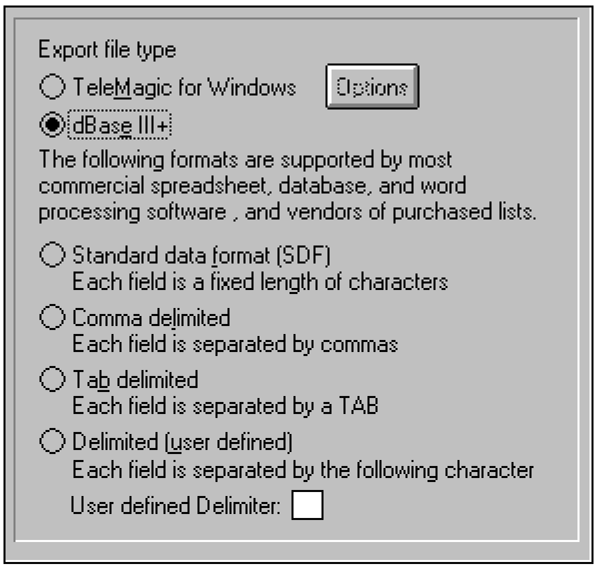
1. From the **File** menu, select **Export**.

   The Export Formats selection box will open.

2. Choose **Add**.

   The Export Format dialog box will open.

3. From the `Export file type` radio buttons on the right of the screen, select `dBase III+`.




4. Type a description of the format in the `Export format name` field.

   TeleMagic will add this description to the Export Format selection box for future use.

5. Type the complete path and file name for your exported records in the `Output file name:` field. The path should be an existing path on your PC or network. The file name should be for a new file that TeleMagic will create on export. (TeleMagic will add the file extension .DBF by default when you select the dBase III+ export file type.)

6. Select `Activities` (for Activity Manager records) from the `Export from:` list.

7. Choose **Select Fields**.

   The Choose Fields to Export dialog box will open.

8. Select the first field you want to export from the list on the left, then choose **Add**. The field will be added to the right-hand side, indicating it will be exported. Repeat this for each field you want to add.

   To remove a field from the list, highlight it on the list on the right and click **Remove**.

**or** Choose **Add All** if you want to export data from all fields. They will be added in order.

   The fields will be exported in the order they appear on the list on the right. If necessary, you can adjust the order in which the fields are exported.

9. To adjust field order, select any field and drag its positioning arrow up or down as required.

10. When you have finished selecting and ordering fields for export, choose **OK**.

**or** If you want to abandon your selections, choose **Cancel**.

   The Export Format dialog box will reappear. TeleMagic will assign output field names for the selected fields based on the field names in TeleMagic.

11. If you want to manually adjust the field names, choose **Assign Fields**.

**or** If you do not want to manually adjust field names, skip to step 15.

   The Export - Assign Output Field Names dialog box will appear.

   On the left, under the `Field Exported` heading, you will see a list of the original TeleMagic field names. On the right, under the `Field Assignment` heading, TeleMagic will propose output field names based on the original field names.

12. To change the field name assignment, highlight the field you want to change.

   The current assignment will appear in the `New Field Assignment:` field.

13. Type a new field name in the `New Field Assignment:` field and press ENTER.

14. Select the next field you want to change and repeat step 13.

**or** Choose **Close** to save your settings and exit the Export - Assign Output Field Names dialog box.

   TeleMagic will return to the Export Format dialog box.

15. Choose **OK**.

The Export Format dialog box will close. The export format name will appear in the Export Format selection box, ready to be used.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Create_a_dBase_III_Export_Format)<<1} To Create a dBase III+ Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1} Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Creating a Delimited Text Export Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

A delimiter is a special character used to indicate the end of a field. When a file is exported in delimited text format, the information from each field will be exported with trailing spaces trimmed off. The specified delimiter character will be placed at the end of the field to instruct the import program where one field ends and the next begins.

Delimited text format is an export-file type that is commonly supported by most word processing and spreadsheet programs. Different applications often recognize different characters as the delimiter. Before proceeding you should refer to the documentation accompanying the program to which you will be importing to find out what delimiter character that program supports.

When creating the export file, TeleMagic places the contents of each field in quotes (e.g., “Name”). Make sure that the application you are importing into does not also use quotation marks as a delimiter.

## To Create a Delimited Text Export Format:

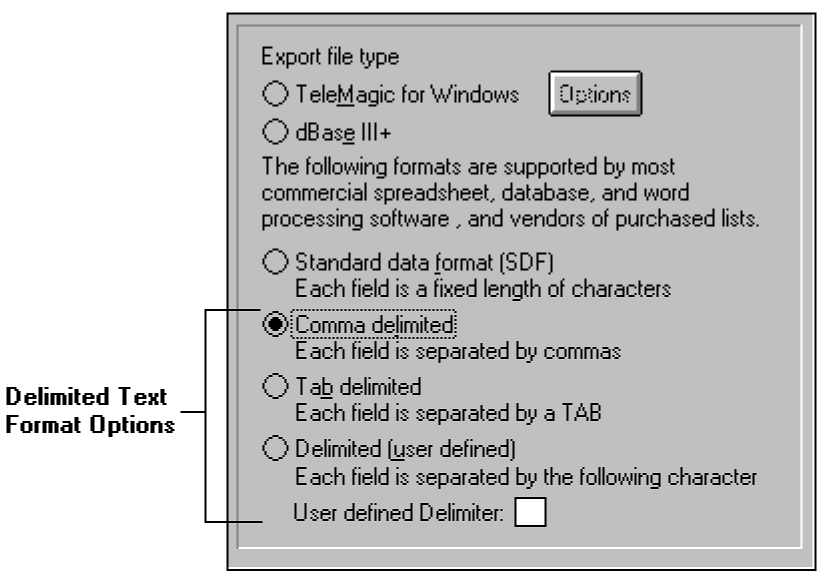
1. From the **File** menu, select **Export**.

   The Export Formats selection box will open.

2. Choose **Add**.

   The Export Format dialog box will open.

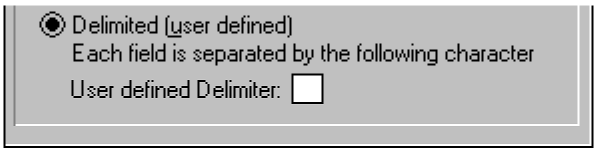
3. From the `Export file types` listed on the right of the screen, select a delimited file format:




**Export File Type List**

- Your selection should be based on the file type supported by the application to which you will be importing. If your target program recognizes a delimiter other than the comma or tab, select `Delimited (user defined)`.

4. If you have selected `Delimited (user defined)`, type the delimiter into the `User defined Delimiter:` field:




**Delimited (user defined) Option**

- Make sure you use a delimiter that will not appear in the output data (such as a character that would normally be entered as data in a field), and that the target program will accept and recognize the delimiter. (You should not use a quote (") as a delimiter.)

5. Type a description of the format in the `Export format name` field.

   TeleMagic will add this description to the Export Formats selection box for future use.

- 6. Type the complete path and file name for your exported records in the `Output file name:` field. The path should be an existing path on your PC or network. (If you do not enter a path, the file will be placed in the current database directory.) The file name should be for a new file that TeleMagic will create on export.

7. From the `Export from:` list, select `Activities` (for Activity Manager records) or select the database level containing the contact records you want to export. (You will be able to export records from the selected level and above. In other words, if you select Level 2, you will be able to export fields from Levels 1 and 2, but not 3.)

8. If you selected a contact level in step 7, above, select an index from the `Index` drop-down list. If you do not care in what order the records are sorted after export, select `None`.

   Your target program can probably re-sort the data after it is imported there, so your decision may not be critical.

- 9. If you selected a contact level in step 7, above, and want to limit the records exported to a filtered group of records, select the filter from the `Filter` drop-down list. The list will contain all filters already existing in this database. If you want to export all records, choose `None - All`

`Records Available.`

10. Choose **Select Fields**.

    The Choose Fields to Export dialog box will open.

11. Select the first field you want to export from the list on the left, then choose **Add**. The field will be added to the right-hand side, indicating it will be exported. Repeat this for each field you want to add. If you select a field in error, highlight it on the list on the right and click **Remove**. It will disappear from the right-hand list.

- **or** Choose **Add All** if you want to export data from all fields.

    Fields will be exported in the order they appear on this list. Some applications require that fields be in a particular order in the export file. If necessary, you can adjust the field order.

12. To adjust field order, select any field and drag its positioning arrow up or down as required.

13. When finished, choose **OK**.

    You will be returned to the Export Format dialog box.

14. Choose **OK** to save your format.

    The Export Format dialog box will close. The export format name will appear in the Export Formats selection box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1}
Exporting Records Using Existing Export Formats
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Creating a Standard Data Format Export Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Hint_for_Creating_a_Standard_Data_Format_Export_Format)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

Standard data format exports all data as one long string of characters. The data are divided back into multiple fields by the target application on import. When the original fields are exported, the entire field (data and trailing spaces) will be included. When the exported file is later imported into the target application, you must specify how long each field is. The target application will divide the data into separate fields, based on the lengths you specify.

## To Create a Format to Export Records to Standard Data Format:

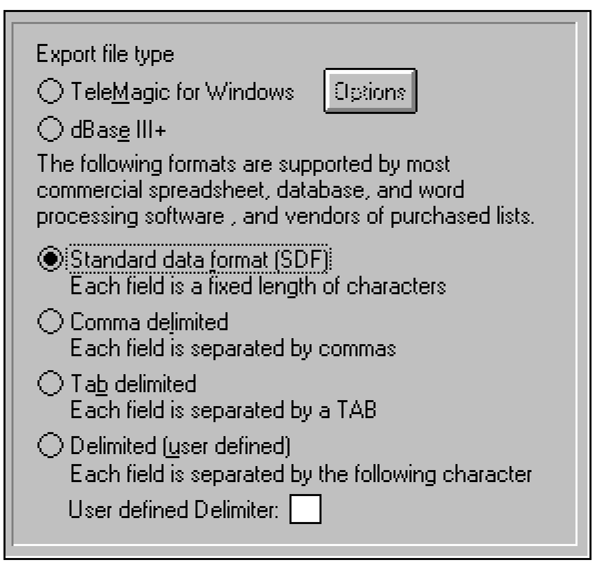
1. From the **File** menu, select **Export**.

   The Export Formats selection box will open.

2. Choose **Add**.

   The Export Format dialog box will open.

3. Select `Standard data format (SDF)` from the `Export file type` radio buttons on the right of the screen:




**Destination File Format List, with Standard Data Format Selected**

4. Type a description of the format in the `Export format name` field.

   TeleMagic will add this description to the Export Formats selection box for future use.

5. Type the complete path and file name for your exported

records in the `Output file name:` field. The path should be an existing path on your PC or network. (If you do not enter a path, the file will be created in the current database directory.) The file name should be for a new file that TeleMagic will create on export. When you selected the `Standard data format (SDF)` export file type, TeleMagic will have automatically entered the extension .SDF in this field. You may edit this extension, if necessary.

6. From the `Export from:` list, select `Activities` (for Activity Manager records) or select the database level containing the contact records you want to export. (You will be able to export records from the selected level and above. In other words, if you select Level 2, you will be able to export from Levels 1 and 2, but not 3.)

7. If you selected a contact level in step 6, above, select an index from the `Index` drop-down list. If you do not care in what order the records are sorted after export, select `None`.

   Your target program can probably re-sort the data after it is imported there, so your decision may not be critical.

8. If you selected a contact level in step 6, above, and you want to limit the records exported to a filtered group of records, select the filter from the `Filter` drop-down list. The list will contain all filters already existing in this database. If you want to export all records, choose `None - All records available`.

9. Choose **Select Fields**.

   The Choose Fields to Export dialog box will open.

10. Select the first field you want to export from the list on the left, then choose **Add**. The field will be added to the right-hand side, indicating it will be exported. Repeat this for each field you want to add. If you select a field in error, highlight it on the list on the right and click **Remove**. It will disappear from the right-hand list.

**or** Choose **Add All** if you want to export data from all fields.

   The fields will be exported in the order they appear on the list on the right. When importing the exported file into some applications, the list of fields must be in a particular order. If necessary, you can adjust the order in which the fields are exported.

11. To adjust field order, select any field and drag its positioning arrow up or down as required.

12. When finished choose **OK**.

   You will be returned to the Export Format dialog box.

13. Choose **OK** to save your format.

    The Export Format dialog box will close. The export format name will appear in the Export Formats selection box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Exporting_Records_Using_Existing_Export_Formats)<<1}
Exporting Records Using Existing Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Exporting Records Using Existing Export Formats

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|
NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½U_MX_Hint_for_Exporting_Records_Using_Existing_Export_Formats)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|
RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

Access to the record export function is subject to group security restrictions. Before an export can proceed, the TeleMagic user account running must be a member of a TeleMagic security group that allows them. If it is not, the **Export** option will be dimmed (unavailable) on the **File** menu. If your account is denied access to the export function, it is likely you are not a member of a TeleMagic security group that is allowed to perform them. Contact your network or TeleMagic administrator for access.

Once you have created an export format, you can use it to export records to the file that was specified when the export format was created. If you continue to make changes to your database, you can use the export format as many times as you like to continue to export the new records. (If you have already used the export format to create an export file, unless you want to overwrite the original file, make sure that you either remove the existing file from the export path before using the format again, or change the target path at the time of export.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Execute_an_Existing_Contact_Record_Export_Format)<<1} To Execute an Existing Contact Record Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Run_an_Existing_Activity_Export_Format)<<1} To Run an Existing Activity Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# To Execute an Existing Contact Record Export Format:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

If you want to execute an existing activity export format, see To Run an Existing Activity Export Format.

1. From the **File** menu, select **Export**.

   The Export Formats selection box will open.

2. Select the format you want to execute, and choose **Run**.

   The Output Filename dialog box will open.

   The path and file name that were established when the export format was created will be offered as a default.

3. If you want to create the export file in a different path, or with a different file name, enter the path and/or file name in the `Enter output file name:` field.

4. Click **OK**.

   TeleMagic will export the selected records to the file name you have supplied.

   While the export is taking place, TeleMagic will inform you of its progress.

   A message box will alert you when the export is complete and inform you of how many records were exported altogether.

5. Click **OK** to close the Export Complete message.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM3_To_Run_an_Existing_Activity_Export_Format)<<1} To Run an Existing Activity Export Format:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Running an Existing Activity Export Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Exportï¿½ ï¿½ ï¿½ )<<1}

## To Run an Existing Activity Export Format:

1. From the **File** menu, select **Export**.

   The Export Formats selection box will open.

2. Select the activity export format and click **Run**.

   The Output Filename dialog box will open.

   The path and file name that were established when the export format was created will be offered as a default.

3. To create the export file in a different path, or with a different file name, enter the path and/or file name in the `Enter output file name:` field.

4. Choose **OK**.

   The Activity Filter dialog box will open.

   The `Activities assigned to:` list allows you to include activities in the export that belong to users who have granted you either full access or rights to view full details of their calendars.

5. Click on any users whose activities you want included in the export. An X will appear beside the users' names. (Click on that user's name again to remove the X.)

6. If you want to filter the activities to be exported by activity type, enter the type in the `Activity type:` field. (Make sure you use the exact spelling, including capitalization, for the activity type as it is used in list box attached to the `Type` field in the Activity Manager, or press F2 to select the type from the list box.)

7. If you want to filter the activities to be exported by the contents of the activity's `Status` field, enter the status in the `Activity Status:` field. (Make sure you use the exact spelling, including capitalization, for the activity status as it is used in the list box attached to the `Status` field in the Activity Manager, or press F2 to select the status from the list box.)

8. Use the radio buttons to filter on completion status:

   - Select `All Activities` if you want all activities included, regardless of completion status.
   - Select `Completed Only` if you want only to include activities that have been completed.
   - Select `Pending Only` if you want only to include activities that have not been completed.

9. To include To-Dos for the selected user(s) in the export, mark the `To-Do's` check box.

10. To filter the activities by priority, leave the priority check box (`Priority one`, `Priority two`, `Priority three`, or `No Priority`) blank for any priority you do not want included in the export. If a check box is not marked, any activities having that priority will not be included in the export.

    If you have selected `All Activities` or `Pending Only` in step 8, the `Due Date/Time Range` section will be available.

11. To filter activities by their due date and time, enter a date range under `Due Date/Time Range` in the `Start Date` and `End Date` fields; and a time span in the `Start Time` and `End Time` fields. (Leave these fields blank if you do not want to filter by due date or time.)

    If you have selected `Completed Only` in step 8, the `Completion Date/Time Range` area will become available.

12. To filter your completed activities by completion date and time, enter a date range under `Completion Date/Time Range` in the `Start Date` and `End Date` fields; and a time span in the `Start Time` and `End Time:` fields. (Leave these fields blank if you do not want to filter by completion date or time.)

13. When satisfied with your selections, choose **OK**.

    When export is complete, an export message box will display the number of records processed and exported.

14. Choose **OK**.

15. Choose **Close** to exit the export program.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_To_Execute_an_Existing_Contact_Record_Export_Format)<<1} To Execute an Existing Contact Record Export Format:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM3_Creating_New_Export_Formats)<<1} Creating New Export Formats
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½UM1_Utilities_and_Maintenance)<<1} Utilities and Maintenance

# Notes for Importing Records From Another Program

Access to the record import function is subject to group security restrictions. Before an import can proceed, the TeleMagic user account running must be a member of a TeleMagic security group that allows import. If it is not, the Import option will be dimmed (unavailable) on the File menu. If you are denied access to the import function, contact your network or TeleMagic administrator for access.

You will need to export your source file to one of these common formats before importing the data into TeleMagic. During import, TeleMagic converts your data from the common (interchange) format. If the program you want to use does not export to a common format, you may require a third-party data-conversion program to move the data to a common format.

We strongly recommend that you make a complete backup of your TeleMagic database before importing any new records; see Data Backup for details.

If the records you are importing do not need to be in the same database as existing records, consider creating an empty database to contain the imported records. In this way, if you are not satisfied with the results of the import, you can simply delete the entire database and start over without having to restore a backup.

# Notes for What You Will Need to Decide On Before an Import

Structure of your Target Database—Print a Database Structure report for complete details on your database structure. See the Database Structure Report topic for instructions.

What Fields and Records are Contained in the Import File—Although you cannot filter the source records directly, you can use TeleMagic field validation (by expression and/or list) to perform limited filtering of the records being imported. When creating the import format, you will have the option of rejecting records if the fields in them do not meet the validation requirements. It is a good idea to give careful thought to this before creating the import format. If you have several fields that are validated, the data in each of those fields must meet the validation criteria, or the entire record will be rejected. Consider your validations carefully before performing them, and try them on sample data before applying them to the entire list. If you do want to reject records based on validation of a particular field, you may need to turn off validation on other fields during the import.

## Note for Step 7

When a TeleMagic for Windows export format is run, multiple files are created. The files will contain the file name, they will be numbered, and they will have the extension .dbf or .fpt. When you enter the path, make sure that all required files are in the specified directory. (In TeleMagic Professional, 4 files are created; in TeleMagic Enterprise, up to 6 files are created, depending on whether the database contains memo fields.) When you enter the file, you only need to enter the name of the file that ends in 1.DBF. TeleMagic will search the directory for the other necessary files.

## Note for Step 6

In order to be imported, activities must be part of the source file being imported. Activities will be included in the source file if you performed a TeleMagic for Windows export that included both contact and activity records. See Creating a TeleMagic for Windows Export Format for details.

You can import activities directly from a TeleMagic for Windows installation. To do so, you must copy the ACTIVITY.DBF file to the same directory as the file containing the contact data that you are importing.

# Note for Creating a Format to Import TeleMagic for Windows Activities

If you want to import activities linked to a contact record and retain that link, you should export them from the source TeleMagic database along with the contact records using the Activity Options in Export. (See Creating a TeleMagic for Windows Export Format for details.)

## Note for Step DOS 3

If you have an RCL field in your TeleMagic for Windows installation, you have the option of leaving these as contact-based recalls (by matching the DOS RCL field to the TeleMagic RCL field), converting them to activity-based recalls, or both. (If you choose only to convert them to activity-based recalls, do not match the RCL field from DOS to the RCL field in Windows.)  Be aware that if you choose not to create an activity-based recall, and do not match the RCL field from DOS to a field in Windows, these recalls will not be imported.

## Note for Step 5

TeleMagic and dBase file names usually include the extension .DBF. (Consult your source program documentation to confirm its file name extension.) If the file you are importing was exported from TeleMagic for DOS, there will be one file ending in .DBF and possibly one ending in .DBT (depending on if the file contains memo fields). Although both files need to be in the directory, you only need to select the file ending in .DBF.

## Note for Step 6

If you will be importing Activity Manager records, make sure you have backed up your TeleMagic ACTIVITY.DBF file before actually importing.

## Note for Step 5

TeleMagic will read the header information in the import file to determine the file type. If you are unable to create a format for your chosen file, either your file is of the wrong type, or is corrupt. If the file is corrupt, access your source application and perform the export again. If you are importing a TeleMagic for DOS database, TeleMagic will detect what version was used to create the file. Some additional options are available when importing a database created with TeleMagic for DOS V14 and later.

## Note for Step 9

If you decide you do not want to assign a field you have selected, highlight the field on the `Field assignments` list, scroll to the top of the `Assign to TeleMagic field:` list, and select the blank line. The field assignment will be removed. If you want to change an assignment, highlight the field on the `Field assignments` list, then select the correct target field from the `Assign to TeleMagic field:` list.

## Note for Creating a Delimited Text Import Format

If you have not already done so, please read Importing Records from Another Program carefully before starting. If you will be importing activity manager records, make sure you have backed up your TeleMagic ACTIVITY.DBF file before proceeding.

## Note for Step 8

If your source program requires a delimiter other than a comma or tab, select `Delimited (user defined)`.

# Note for Creating a Standard Data Format (SDF) Import Format

In the event that there is an error in your field assignments, it is a good idea to perform the import into a copy of your database which contains no contact records. (See the Copying Existing Databases topic for instructions on copying a database.)  Once you have determined that the records import correctly, you can either perform the import again into the desired database, or you can continue to use the records that were imported during the test. If there are any problems with the import, you can simply delete all of the records in the database and start over.

## Note for step 8

If you will be importing Activity Manager records, make sure you have backed up your TeleMagic ACTIVITY.DBF file before proceeding.

## Note for step 25

You can set up validation in the database to filter the incoming records.

Give careful thought before marking this setting. If this setting is marked and any field in the record fails to meet validation criteria, the entire record will be rejected. Additionally, performing complete record validation can take some time, especially if you have many validations to perform. Conversely, if this setting is not marked, you may end up with records with invalid field data.

## Note for step 26

This check box will be dimmed if the `Record validation` check box is not marked.

## Note for step 10

If you are importing information from a commercially distributed mailing list in SDF format, keep in mind that most commercial list brokers provide field lengths with their lists. However, if you do not know the field length, you can determine it by counting the number of characters, including blank spaces that follow the entry, taken up by data for that field.

## Note for Step 7

Delimited file names usually end in the extension .DLM or .TXT.
Standard Data Format files usually end in the extension .SDF or .TXT.
Consult your source program documentation to confirm its file name extension.

## Note for Changing or Copying an Import Format

If you change the path and file name for your source records in the `Source File:` field, you will need to verify that the field assignments are correct. If the new source file contains even one different field name, or requires one different field assignment than the original format, you must re-establish the field assignments or the import will not run.

## Note for Step 4

This option will only delete the import format. The import file being referenced in the import format will not be affected.

## Note for Step 4

The rebuild report will be sent directly to your default printer. Make sure you have a default printer established for the workstation running the rebuild before selecting this option.

## Hint for Step 7

If you would like a complete list of the system files that are rebuilt, mark this option and run a rebuild with the `Full Report` option selected. The rebuild report will list the system files that were rebuilt.

## Note for Step 10

Only the user tables for your User ID will be rebuilt with internal rebuild. If you want to rebuild other users' user tables, you must either rebuild using another user's login, or perform an external rebuild using the /R parameter. See the *System Administrator Guide* for more information on external rebuild.

## Note for Step 2

If you select the `Delay Until` radio button, you must also enter the date and time. If you do not, no hold time will be applied.

## Notes for Step 5

Depending on the number of calculated fields you have in your database, selecting this check box can dramatically increase the time it takes to perform a rebuild.

During rebuild, all Level 1 calculated fields are evaluated, followed by Level 2, then Level 3. If you are using ChildSum( ) or ChildCount( ) in a calculated field or rollup, you should be aware of whether or not the parameters used with these functions include lower level calculated fields. If they do, you may need to perform the database calculations twice to get an accurate child sum or count. For example, if you have a child sum being performed on Level 1 that is summing a Level 2 calculated field, TeleMagic will read the contents of the Level 2 field when calculating the child sum. When TeleMagic reaches Level 2 and performs the calculations for that level, the data in the Level 2 calculated field may change. In this case, the child sum would need to be performed again to reflect the updated information.

## Hint for Step 1

Use the **User Monitor** option off the **Help** menu to determine if there are any other users in the applicable databases.

## Note for Step 4

If you have not added or changed any indexes, you will receive a message that you must rebuild existing indexes using database rebuild. See To Rebuild All Indexes for instructions.

## Note for Step 4

If you do not enter a path, the export file will be created in the current database directory.

## Note for Step 5

If you want to export only TeleMagic activities, see To Create a Format to Export TeleMagic for Windows Activities. If you want to export contact records and linked activities, continue with this topic.

## Note for Step 6

Only previously created filters will appear as options in the `Filter` list. If there is not an existing filter that meets your export requirements, create one before proceeding. (For more on filtering, see the Creating Filters topic.) The `Index` option will be unavailable when creating a TeleMagic for Windows export format.

## Note for Step 9

If you do not mark this check box, you will not be able to make any other selections from this dialog box.

## Note for Step 15

Make sure you do not export any sensitive information, such as costs or salary data, unintentionally. Choose the fields you are exporting with care.

## Hint for Step 16

You may want to sort your output order so that it matches the order of the Database Structure report. This will make importing data into another program a lot easier. (See the Database Structure Report topic for more information.)

## Note for Step 18

If you did not use the correct naming convention in step 4, you will see a warning message informing you that the file name must end in “1” and the extension must be “.dbf”. Click **OK** to close this message. Change the file name and click **OK** again.

## Note for Step 4

If you do not enter a path, the export file will be created in the current database directory.

## Note for Step 5

The `Index` and `Filter` options are only applicable to exporting contact records and will be unavailable when you select `Activities` from the `Export From` list. Filtering activities for export is controlled at the time the export format is run.

## Note for Step 7

If you have incorrectly named the file, you will receive an error message informing you that the file must be named “ACTIVITY.DBF”. Click **OK**, and rename the file. Click **OK** again to exit the Export Format dialog box.

## Note for Step 5

If you export to dBase III+, TeleMagic will add the file extension .DBF by default.

## Note for Step 6

If you would like to export Activity Manager records, see To Export Activities to dBase III+ Format.

## Note for step 8

Only previously created indexes and filters will appear as options under `Index` and `Filter`. If there is not an existing filter or index that meets your export requirements, create one before proceeding. (For more on filtering and indexing records, see the Sorting, Selecting, and Finding Records topic.)

## Note for Step 10

Make sure you do not export any sensitive information, such as costs or salary data, unintentionally. Choose the fields you are exporting with care.

## Hint for Step 11

You may want to sort your output order so that it matches the order of the Database Structure report. This will make importing data into another program a lot easier. (See the Database Structure Report topic.)

## Note for Step 13

dBase is the only export format that allows field names to be assigned.

## Note for Step 15

If you do not want to change the field assignment, click **Cancel** to exit this dialog box. Return to the Choose Fields to Export dialog box and remove the duplicate field from the list being exported. (See steps 9 through 12 for instructions.)

## Note for step 16

If you change a field assignment, it will no longer correspond to a Database Structure report (if you have printed one). It is recommended that you note which field assignments you have changed.

## Hint for Step 16

You may want to assign field names which will match the database to which you will eventually import the data. This is usually necessary when importing into a TeleMagic for DOS installation.

## Note for Step 6

The `Index` and `Filter` options are only applicable to contact-based export. These options will be dimmed when exporting activities.

## Note for step 8

Activity comments are stored in a different location than the rest of the activity. What is stored with the activity is a comment ID that tells TeleMagic where to look for the comments. Although you can choose to include the comment ID ({Activity.Commentid}), the actual comments will not be included.

## Note for Step 9

Some applications require that fields be in a particular order when importing. Refer to the documentation for the application into which you will be importing for details.

## Note for step 14

If you want to abandon your changes, press ESC.

## Hint for step 3

Most word processors can read `Comma delimited` files. Most spreadsheets can read `Tab delimited` files. Check the documentation for the program into which you will be importing the exported file to confirm what type of delimiter your program will recognize.

## Note for Step 4

If you select a delimiter that will appear in the output data, every time that character appears, any data following the character will be treated as a new field. This means that records could suddenly slip, and part of one record could jump to another. (For example, if you select the hyphen character (-) as a delimiter, any hyphenated names will be separated into two fields.) Select your delimiter with care. If the target program will only recognize one delimiter character, edit the records being exported and remove that character from the data.

## Hint for step 6

When you selected the export file type in step 3, above, TeleMagic will have automatically entered a file extension based on that type. (If you export to the comma delimited file format, TeleMagic will add the file extension .DLM by default. If you export to the tab delimited or user defined delimiter format, the extension .TXT will be added by default.)   Many programs recognize the format of a file by its extension. If your program recognizes an extension other than the one automatically added by TeleMagic, you may need to change the extension of the file so the target program will accept the file as the proper format.

## Note for Step 9

Only previously created indexes and filters will appear as options under `Index` and `Filter`. If there is not an existing filter or index that meets your export requirements, create one before proceeding. (For more on filtering and indexing records, see the Sorting, Selecting, and Finding Records topic.)

## Note for Step 11

If you are exporting contact records, make sure you do not export any sensitive information, such as costs or salary data, unintentionally. Choose the fields you are exporting with care.

## Hint for step 12

You may want to sort your output order so that it matches the order of the Database Structure report. This will make importing data into another program a lot easier. (See the Database Structure Report topic for more information.)

## Note for step 8

Only previously created indexes and filters will appear as options under `Index` and `Filter`. If there is not an existing filter or index that meets your export requirements, create one before proceeding. (For more on filtering and indexing records, see the Sorting, Selecting, and Finding Records topic.)

## Note for Step 10

If you are exporting contact records, make sure you do not export any sensitive information, such as costs or salary data, unintentionally. Choose the fields you are exporting with care.

## Hint for Step 11

You may want to sort your output order so that it matches the order of the Database Structure report. This will make importing data into another program a lot easier. (See the Database Structure Report topic for details.)

## Note for Step 1

Make sure you do not choose an export format that will send out sensitive information, such as costs or salary data, unintentionally. Choose the Export Format you are using with care, or create a format to select only the intended records. Always double-check your exported data before sending it to anyone outside your company.

## Note for Step 4

If the export is in TeleMagic for Windows format, the progress box will inform you of the status on each level.

## Hint for Step 5

You should check the output records carefully to make sure no sensitive data were inadvertently included before you send them out.

## Hint for Data Backup

You can use the Disable Login and Downtime features to ensure that no users are in the main program during rebuild. For information on these features, see the System Preferences topic.

## Hint for Creating a dBase III+ Export Format

If you are creating an export file to be imported into another TeleMagic for Windows database, use the dBase III option if you want to change the level on which fields appear. When using the TeleMagic for Windows export format, each field must be re-imported to the same contact level from which it was exported. Using the dBase III export type, you can match the exported fields to fields on any level you desire when you re-import.

## Hint for Creating a Standard Data Format Export Format

When specifying field lengths in the target application, it is helpful if you provide a Database Structure report with the export file. (See Database Structure Report for details.)

## Hint for Exporting Records Using Existing Export Formats

If you are planning to use the same format to export data on a regular basis, make sure that you can pick out only new (not previously exported) records through your filter; otherwise, your target database will contain duplicate entries. Consider adding a field to your TeleMagic database that tracks whether a record has previously been exported, and creating an export filter which only passes new records. You could also use the TMSTART field in your filter to export only records created since the last export.

## Note for Step 5

Select from the following:

**Import using TeleMagic for Windows format**
Select this radio button if your source database was created in any TeleMagic for Windows format, including TeleMagic Professional.

**Import directly from a TeleMagic for DOS installation**
Select this radio button if you will be importing from any TeleMagic for DOS database. You must have access to the DOS installation to use this option. There may be some differences in the procedure when importing databases created in DOS versions prior to V14 as compared to performing the same function with a V14 or later database. The wizard automatically determines which category the database belongs to, but you will need to know the DOS version in order to follow this procedure.

**Import from a single dBase III file**
Select this radio button if your source database is in dBase III format and is a single level. You can import multiple files to different TeleMagic levels using the next option.

**Relate separate database files for each level in TeleMagic**
Select this radio button if you have two or three single-level databases that you want to import into a TeleMagic relational database. You will assign each database to a level in the TeleMagic database, and specify the criterion to be used to determine which child records are to be associated with which parent records.

**Other import file types**
Select this radio button to import from any of the other supported file types.

## Other Import File Types

Select the file format of the source database from the list. If you select `User defined delimited`, enter the delimiter in the `Select the delimiter for this file` field. The following formats are supported:

| | |
|---|---|
| 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 |

When you have made your selection, and selected the delimiter character if required, click **Next**. Close this window and proceed to the next step in the procedure (step 6).

## SDF File Parser

Standard Data Format (also called System Data Format) defines fields on the basis of length in characters, as opposed to most other formats which use delimiters to mark the ends of fields. Use this step in the wizard to identify the limits of each field. A sample of the data in the source file is displayed in the large field near the center of the dialog box. Above this field is another field with indications of the number of characters to the left. The short lines indicate one character, the larger lines indicate five characters, and the numerals indicate ten characters. For example, there are 10 characters to the left of the 1.

To define the end of a field, click anywhere on the field with the character marks. A limit pointer will be added to the field. A line will appear in the field containing the sample data. As you move the limit pointer, the associated line will move. Move the pointer and its associated line to the desired location for the field limit. You can remove a pointer and its line by double-clicking on the line or pointer.

**WARNING!**

If two or more adjacent fields contain no data and therefore display only blank spaces, you will not be able to accurately guess their length. Whenever possible, note source field lengths *before* you begin to construct an SDF import format. If you parse the wrong field length, you may lose data during import.

When you have established all of the field limits, click **Next** to proceed. Close this window and continue to the next step in this procedure(step 9).

## Note for Step 9

- Data will not be imported from fields that you have not matched to TeleMagic field names.
- Notepad/Memo fields are assigned in the same manner as any other field type.
- You cannot import data directly into calculated fields, unique number fields, or OLE fields.
- If you have already selected a TeleMagic target field, you cannot use that field again. If you have incoming data for which there is not a corresponding field in your target database, consider adding the field to your TeleMagic database before performing the import.
- You may only assign a field from a particular level of your source database to a field on the same level in your target database. For example, if you export a field from Level 2 in the source TeleMagic database, when you import that field into the target TeleMagic database, you must match it to a field from Level 2.

## Hint for Step RDB 2

TeleMagic uses the CONTACTID field to uniquely identify and relate records to one another. Level 1 records are identified by a 7-character ID, level 2 records are identified by a 14-character ID, and level 3 records are identified by a 21-character ID. The first 7 characters of each level 2 record is identical to the 7-character ID of its parent. The first 14 characters of each level 3 record is identical to the 14-character ID of its level 2 parent.

If this same system were used in the files being imported, the parents would, of course, be identified by the data in their CONTACTID field. The parent of each child record on level 2 could be identified by the expression SUBSTR(CONTACT2.CONTACTID,1,7). The same system would work for level 3 records, if 14 were substituted for 7 and the level 3 field were referenced instead of level 2. In this example, you could also use LEFT() function since you are always returning the leftmost characters in the field. Using the LEFT() function, the expression would be LEFT(CONTACT2.CONTACTID,7) for finding the parent record identifier for a level 2 record.

## Note for Step 10

The ACTIVITY.DBF file may contain activities which are linked to records in other databases. If you choose to import linked activities, and there are activities in your ACTIVITY.DBF file which are linked to records in other databases, these activities will be included in the import. Activities imported in this case will only be seen when generating an activity report for “All Users”.

## Select Memo Fields to Contain Rejected Data

You have chosen to reject data which fails validation while retaining all other data in the record. You have the option of adding the rejected data to memo fields. In each of the fields on this step, open the drop-down list and select the memo field where the rejected data will be stored. Open the drop-down list for each field by clicking on the arrow button. If you do not want to store the rejected data on any particular level, leave that field blank. You are not required to store rejected data, you can choose to leave all of the fields blank.

When you have decided how to handle rejected data, click **Next**. Close this window and proceed to the next step (step 14).

## Note for Step 14

There are several ways that TeleMagic can determine that a record is a duplicate. It can use all of your existing indexes that have Duplicate Record Checking selected, it can use a single index of your choice, or you can create a custom index. You will choose which method is to be used in the next step.

When you elect to reject duplicate records, only duplicate contact records are rejected. Duplicate indexes, list boxes, and filters will be imported.

## Note for Step 8

The test criterion does not need to match the entire contents of the field being tested. For example, if your filter expression was “source1.com <> ‘Roseingdales’” and you had a record where source1.com was “Roseingdales of Omaha”, that record would not be included. The test is handled in this manner because field size cannot be determined in all formats.

## Note for Step 18

If the Start field of the target database is not matched with a Start field in the source database, the current date will be used as the start date for the records being imported. If you choose not to update Last Revision, and there is no Start field identified from the source database, it is possible to have records where Start is later than Last Revision.

## User Groups

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(User Groupï¿½ ï¿½ ï¿½ )<<1}

User groups are used throughout the program to perform functions for a pre-established group of users simultaneously. For example, when sending e-mail you may want to address the message to a specific department or group of individuals rather than to a single user, or you may want to print a report on an entire group of users. The User Group option allows you to set up groups that can be accessed in other areas of the program.

Typically, a company will have a group for its Sales team, Administration team, Personnel team, etc. You might also create a group of users with common interests, such as a group of employees who are working on a specific project, but who work in different departments within the company. All of the Managers in the company might form another group. User groups are flexible, and can be used for any number of purposes. A user can be in several different groups at one time.

Do not confuse the user groups you create with security groups. Defining users in a user group will not have any affect on their security access within TeleMagic.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Add_a_User_Group)<<1} To Add a User Group:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Change_the_Name_of_a_User_Group)<<1} To Edit a User Group:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Delete_a_User_Group)<<1} To Delete a User Group:

# To Add a User Group:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(User Groupï¿½ ï¿½ ï¿½ )<<1}

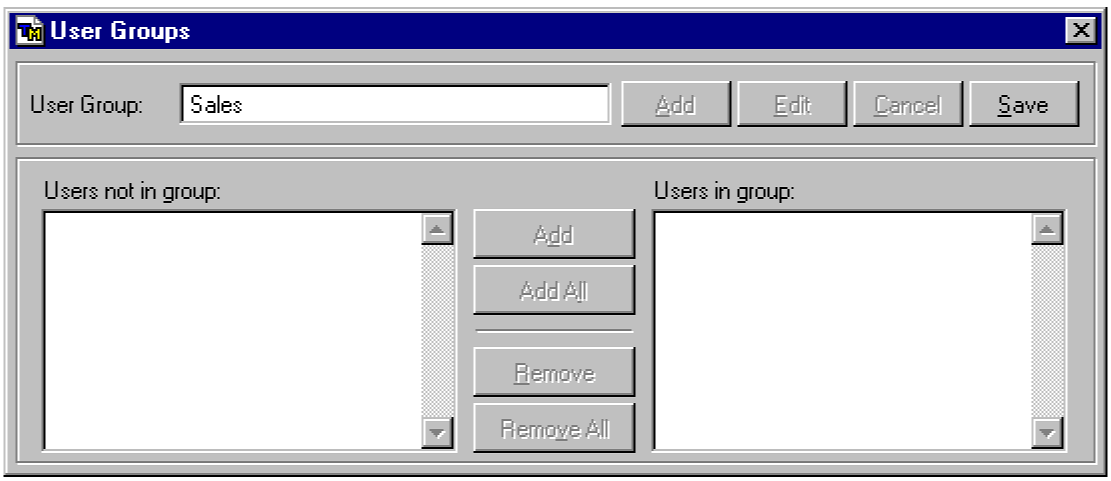
1. From the **Options** menu, select **User Groups**.

   The User Groups dialog box will appear with all available users listed in the `Users not in group:` field. If you have no user groups established, the `Users not in group:` field will be blank.

2. Choose **Add**.

3. Type the name of the user group you want to add.

   **Example:** Sales




4. Choose **Save**.

   All of your users will appear in the `Users not in group:` field.

5. Highlight each name and choose **Add**, or to select them all at once, choose **Add all**. Each name selected will appear in the `Users in group:` field.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Change_the_Name_of_a_User_Group)<<1} To Edit a User Group:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Delete_a_User_Group)<<1} To Delete a User Group:

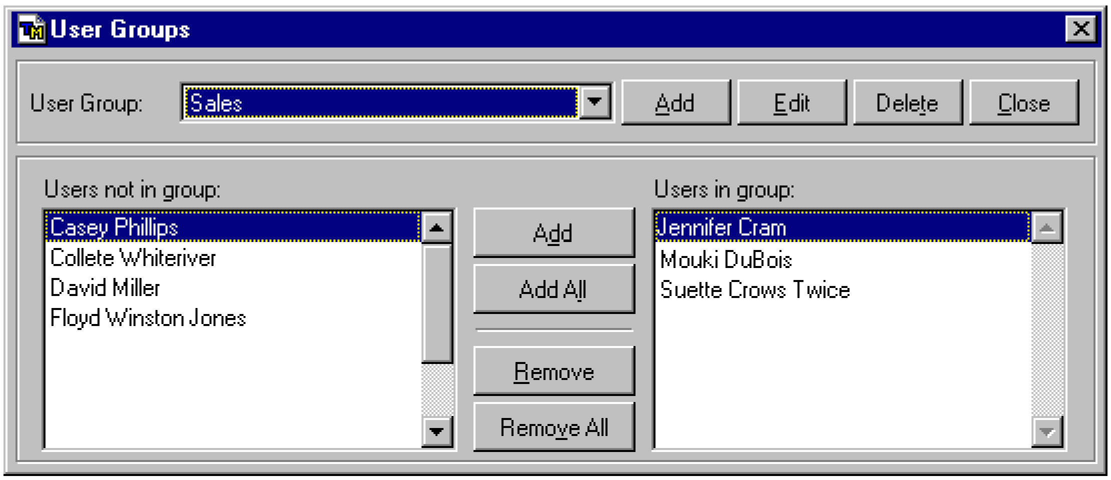
# To Edit a User Group:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(User Groupï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **User Groups**.

   The User Groups dialog box will open.

2. Select the user group you want to change from the drop down list:




**User Groups Dialog Box**

3. To change the name of the group, choose **Edit**.

4. Make the necessary changes. Choose **Save** to continue.

5. Change the membership of the group using the **Add**, **Add All**, **Remove**, **and Remove All** buttons.

5. Choose **Close** to save changes and exit.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Add_a_User_Group)<<1} To Add a User Group:
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Delete_a_User_Group)<<1} To Delete a User Group:

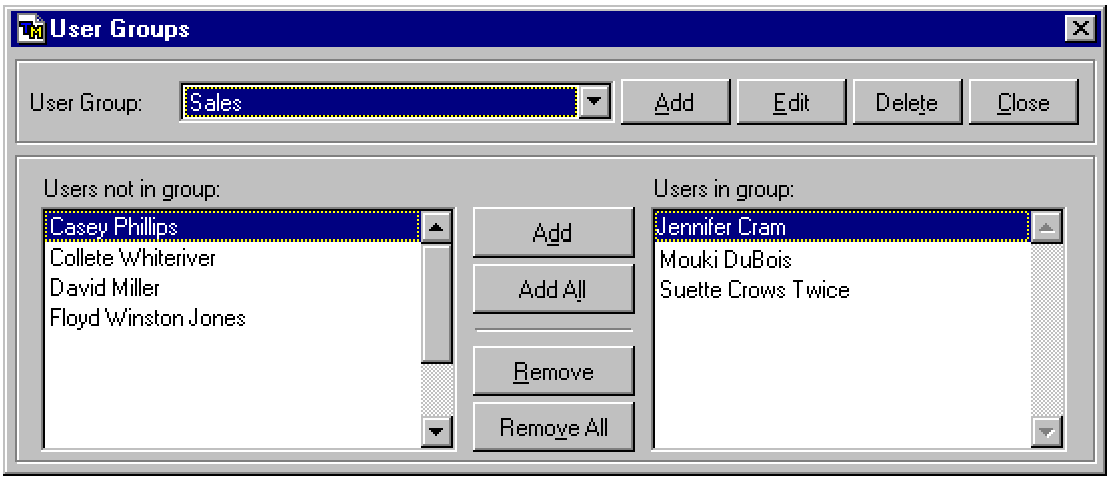
# To Delete a User Group:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(User Groupï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **User Groups**.

   The User Groups dialog box will open.

2. Select the user group you want to remove from the drop down list:




**User Groups Dialog Box**

3. Choose **Delete**.

   A message will appear asking you to confirm your decision to delete.

4. Choose **Yes**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Add_a_User_Group)<<1} To Add a User Group:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½USERGRP_To_Change_the_Name_of_a_User_Group)<<1} To Edit a User Group:

## Hint for Step 4

If you are using Data Synchronization Server, this list will include users from all synchronized sites.

## Note for Step 5

You can select the same users for more than one user group.

# Wireless Messaging with TeleMagic

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

If you are using TeleMagic to its full capacity, chances are you have the program running constantly. You have probably discovered that typing memos to send to co-workers, or interrupting your work session to go to another user's work station to discuss an upcoming activity or a question, is neither practical nor efficient. If so, you may have come to depend on e-mail and the Activity Manager for the total solution to inter-office communication. You probably also enjoy the ease with which you are able to communicate with your clients, leads, and contacts using the dialer and faxing features.

While it is a fact that computer software has made incredible advancements in streamlining business communication, generally both parties have been required to be at their computers—until now.

TeleMagic has combined all of these communication features with the ability to send wireless messages from TeleMagic to a pager. You can inform co-workers of e-mail and activities as soon as they are created. If an urgent situation arises, you can contact anyone with a pager instantly, and include as many details about the situation as necessary to insure prompt response. You can even page yourself and include important information such as addresses and phone numbers. You no longer have to copy information to paper and worry about losing or forgetting it. TeleMagic will copy the information to your pager automatically, giving you the comfort of knowing that as long as you have your pager, you have the information at your fingertips.

To work with the TeleMagic Wireless Messaging feature, the pager must have the capability of accepting alpha-numeric data. Additionally, your paging carrier must be able to accommodate messaging from modems. TeleMagic uses Telocator Alphanumeric Input Protocol (TAP) with its Wireless Messaging feature. Your carrier must use TAP, and its implementation must be compatible with TeleMagic. Not all carriers that use TAP use the same implementation. Once you have set up the Wireless Messaging feature, it is recommended that you perform a test page to verify that your paging system is compatible and can accommodate pages from TeleMagic.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Setting_Up_Wireless_Messaging)<<1} Setting Up Wireless Messaging

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Local_Wireless_Messaging_Troubleshooting)<<1} Local Wireless Messaging Troubleshooting

# Setting Up Wireless Messaging

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

Wireless messages can be sent either from a user's local workstation or from a queue. Setup for the Wireless Messaging queue is discussed in the Automation Server Setup topic. Setup for sending and receiving wireless messages locally is detailed in the topics listed below. If you do not have a modem, or do not want to send wireless messages locally, as long as your system administrator has set up the Wireless Messaging Queue, you do not need to perform any setup locally to send messages. If you want other TeleMagic users to be able to send messages to you through TeleMagic, you will need to perform some basic setup.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Before_Setup)<<1} Before Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_vs_Dialer_Setup)<<1} Wireless Messaging vs. Dialer Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Performing Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Adding_Wireless_Messaging_Fields_to_Your_Database)<<1} Adding Wireless Messaging Fields to Your Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# Before Setup of Wireless Messaging

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

Before setting up your Wireless Messaging system in TeleMagic, there are a few things you need to know:

Your pager ID (Pager PIN) and pager terminal number (carrier phone number).

Before setting up Wireless Messaging in TeleMagic, you should contact your paging carrier to verify that they (and the terminal to which you are currently connected) can accommodate messaging from modems. TeleMagic uses Telocator Alphanumeric Input Protocol (TAP) with its Wireless Messaging feature. Your carrier must use TAP, and its implementation must be compatible with TeleMagic. Not all carriers that use TAP use the same implementation. Once you have set up the Wireless Messaging feature, it is also recommended that you perform a test page to verify that your paging system is compatible and can accommodate pages from TeleMagic.

What packet size your messaging system can accommodate.

Wireless messaging systems have a limit to how much information can be accepted in one page. The amount of information which can be accepted is called a packet size. The minimum packet size that most pagers can accommodate is 80 characters; while some pagers may be able to accommodate more, TeleMagic can send a maximum packet size of 900 characters. When sending a wireless message, TeleMagic will read the packet size and break the message up into packets, sending them one after another. To minimize having your messages split up, enter the highest packet size your pager will accommodate. *Do not* try to enter a packet size higher than your pager will accommodate. Only so much data will be accepted and excess information will be lost.

Your baud rate.

This is not the baud rate your *modem* will accommodate; this is the baud rate your *paging carrier* will accommodate. This information will probably not match the baud rate set up for use with the Dialer. TeleMagic offers a default baud rate of 300. Having the baud rate at a setting higher than what your paging carrier can handle will cause problems—be aware of this if you alter this default setting.

Most of the time, it will not cause a problem if you select a baud rate that is lower than your paging carrier can accommodate. In some circumstances, however, the paging carrier will only connect at a specific baud rate. If you have a problem connecting once you have set up wireless messaging, you may need to adjust your baud rate.

Your modem type.

You must know what type (brand and model number) of modem you are using.

The COM Port to which your modem is attached.

Chances are you will be using the same modem to send messages as you use for the Dialer. Even if you have the COM Port information entered in Dialer preferences, you must enter it again in Wireless Messaging setup. If you have multiple modems, this information may or may not be the same as the modem setup in Dialer preferences.

Modem type and COM Port information is important for users who will be sending wireless messages. Users who want other TeleMagic users to be able to send them messages, but who do not have a modem, or who will not be sending messages themselves, can disregard these settings.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_vs_Dialer_Setup)<<1} Wireless Messaging vs. Dialer Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# Wireless Messaging vs. Dialer Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

If you have a modem attached to your workstation, you may have already configured TeleMagic to work with your modem using the Dialer. Although there is a very good chance that you will be using the same modem for Wireless Messaging as you do with the Dialer, there are a few important differences.

Most modems use standard Hayes-compatible commands when placing phone calls. TeleMagic has these commands already set up, so you do not need to know any specifics concerning your modem when setting up the Dialer. When using Wireless Messaging, on the other hand, TeleMagic needs to know specifically what type of modem you are using.

If you are using the same modem for dialing your phone and for using Wireless Messaging, you need to be aware that the baud rate settings for each will probably be different. When setting up the Dialer, you enter the maximum baud rate your modem can handle. When setting up Wireless Messaging, you enter the maximum baud rate your *paging carrier* can handle. This setting will most likely be considerably lower than the Dialer baud rate.

There may be situations where users have multiple modems hooked up at the same workstation. You may or may not want to use the modem you have set up for dialing the phone with Wireless Messaging. Because of this, you will be required to enter the COM Port both when setting up the Dialer and when setting up Wireless Messaging. Do not assume that because you have entered the COM Port into TeleMagic once, that it does not need to be entered again. TeleMagic will not refer to Dialer settings when using Wireless Messaging, or vise-versa.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Before_Setup)<<1} Before Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Performing Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Setting_Up_Wireless_Messaging)<<1} Setting Up Wireless Messaging

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

## Wireless Messaging Setup

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

Wireless Messaging setup for TeleMagic users includes setup for sending messages and setup for allowing other TeleMagic users to send you messages. Setup for sending messages entails giving TeleMagic information concerning the modem at your workstation. Setup for allowing other users to send you messages entails giving TeleMagic information concerning your pager and paging carrier.

Wireless Messaging setup for TeleMagic contacts includes adding fields to the database to contain paging carrier information.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Full_Setup_To_Send_and_Receive_Messages)<<1} Wireless Messaging Setup for TeleMagic Users

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Adding_Wireless_Messaging_Fields_to_Your_Database)<<1} Adding Wireless Messaging Fields to Your Database

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# Establishing a Default Pager #

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

If all or most users in your installation of TeleMagic subscribe to the same paging carrier, you can save time and repetitive data entry by establishing a default pager number. This number will be entered by default when you first enter Wireless Messaging Preferences. It can be edited for any users with a different paging carrier.

## To Set Up a Default Pager #:

1. From the **Options** menu, select **Preferences...**.
2. Click the **System** tab.

   The System Preferences screen will open.
3. In the `Default Pager Number:` field, enter the number of the primary paging carrier in use by your company.
4. Click **OK** to save your selection and exit Preferences.

**or** Click **Cancel** to exit without saving.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# Full Setup To Send and Receive Wireless Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

Wireless Messaging setup is performed in Preferences. Preferences are editable settings which allow you to configure areas of TeleMagic to your specifications. (For more information on Preferences, see the What are Preferences? topic.)

Use the Wireless Messaging preferences to set up your TeleMagic installation to send wireless messages locally and allow other users to send you messages from TeleMagic.

Review the Before Setup topic for information you should be aware of before proceeding.

## To Set up Wireless Messaging:

1. From the **Options** menu, select **Preferences...**.
2. Click the **Wireless Messaging** tab.

   The Wireless Messaging Preferences screen will open.

   The `Pager ID:`, `Pager #:`, `Baud Rate:`, and `Packet Size:` fields deal with information TeleMagic needs when any users in TeleMagic send you a wireless message. The `Modem Type:`, `Com Port:`, `# of Retries:`, and `Page Send Options` fields deal with modem information TeleMagic needs when you send a wireless message from your workstation.
3. In the `Pager ID:` field, enter your pager PIN (Personal Identification Number).
4. In the `Pager #:` field, enter the number TeleMagic needs to dial when sending you a wireless message (the carrier's phone number).
5. In the `Modem to Use:` field, use the drop down list to select the make and model of the modem at your workstation.
6. In the `Baud Rate:` field, use the drop down list to select the baud rate your paging carrier can accommodate.

**WARNING!**

The baud rate information entered in Wireless Messaging preferences is the baud rate which can be accepted by your paging carrier; not the baud rate at which your modem is capable of sending information. Paging carriers will generally accept information at a much lower rate than the modem is capable of sending. This field defaults to 300. Exercise caution before changing this setting. Most of the time, it will not cause a problem if you select a baud rate that is lower than your paging carrier can accommodate. In some circumstances, however, the paging carrier will only connect at a specific baud rate. If you have a problem connecting once you have set up wireless messaging, you may need to adjust your baud rate.

7. In the `Packet Size:` field, enter the maximum packet size your paging carrier will accommodate. (For more information on packet size, see the Before Setup of Wireless Messaging topic.)

**WARNING!**
Be careful not to enter a packet size larger than your paging carrier will accommodate. If you do so, when you are sent messages, information may be lost.

8. In the `# of Retries:` field, enter the number of times TeleMagic should attempt to send a page before declaring it failed.

9. Use the `Page Send Options` as follows:

   - Mark `Notify On Completion` if you would like to be notified with a pop-up when a message is successfully sent.
   - Mark `Notify On Failure` if you would like to be notified with a pop-up if a message fails to send after the specified number of retries. The message will include an error code indicating the reason for failure.
   - Mark `Paste Current Contact Info` if you want to have contact information based on your Key Field settings (Company, Contact, and address fields) pasted into the message of any pages attached to a contact. This information can be edited or deleted if necessary.
   - Mark `Use Dialer Prefix` if you want TeleMagic to dial the Dialer Prefix entered in Dialer preferences when sending wireless messages.
   - Mark `Monitor Transmission` if you would like to be able to view a dialog box displaying the progress of the page transmission.
   - Mark `Modem Speaker On` if you want to hear the initialization and dialing noises made by the modem when sending a message.
   - Mark `Activity/ToDo - Paste Comments` if you want to have the contents of the activity and To-Do Comments field pasted into messages sent from the Activity Manager. This information can be edited or deleted if necessary.

10. Click **OK** to save the Wireless Messaging settings.

**or** Click **Cancel** to exit without saving.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending

Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# Adding Wireless Messaging Fields to Your Database

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

Although you can use the `Manual Entry` option to send messages to your contacts, it can save time and effort if that information is entered automatically from the Contact Manager. By creating fields in the Contact Manager to contain the pager number and ID, then selecting those fields as key fields, you can have that information automatically pulled into the Wireless Messaging dialog box.

Including fields for Wireless Messaging information in your contact records is a two step process. First, you must add fields to the database with the required templating and place them on the screen; then you must select those fields in Key Fields preferences.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_To_Add_Wireless_Messaging_Fields_to_a_Database)<<1} To Add Wireless Messaging Fields to a Database:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_To_Set_up_the_Pager_and_Pager_ID_Key_Fields)<<1} To Set up the Pager # and Pager ID Key Fields:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_to_Contacts)<<1} Sending Messages to Contacts

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# To Add Wireless Messaging Fields to a Database:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

1. From the **File** menu, select **Add / Edit Fields**.

   The Edit the Field List dialog box will open.

2. Select the radio button corresponding to the database level to which you want to add the fields.

3. Click **Add** to create a field to contain the carrier's phone number.

4. In the `Prompt:` field, give your field a descriptive name. (Consider using ***Pager #***.)

5. In the `Field name:` field, give your field a name.

6. In the `Type:` field, choose `Pager`.

7. In the `Length` field, select 14.

8. Click **Template**.

   The template dialog box for the selected field type will appear.

9. In the Input Mask field, type ***9-999-999-9999***. (The nines are a templating mask character meaning "allow digits only" in that position in the field; the dashes are literal characters—you will not be able to place anything in the field in the positions occupied by the dashes.)

10. Click **OK**.

    The template dialog box will close. The Template field will show the template.

11. Click **Save**.

    Your new field will appear on the field list.

12. Click **Add** to create a field to contain the Pager ID (Pager PIN).

13. In the `Prompt:` field, give your field a descriptive name. (Consider using ***Pager ID***.)

14. In the `Field name:` field, give your field a name.

15. In the `Type:` field, choose `Character`.

16. In the `Length:` field, select 8.

17. Click **Template**.

    The Character Template dialog box will open showing a default template.

18. In the `Input Mask` field, enter ***XXX-XXXX***. (The Xs are templating mask characters that allow anything to be placed in the field in that position; the dash is a literal character—you will not be able to place anything in the field in the position occupied by the literal.)

19. Click **OK**.

    The template dialog box will close. The Template field will show the template.

20. Click **Save**.

    Your new field will appear on the field list.

21. Repeat steps 2 through 20 for any other database levels if necessary.

22. When satisfied with your selections, click **OK**.

23. Using the Contact Screen Designer, add the new fields and their prompts to your screens. For more information on that process, see the Field Tool topic.

24. Enter the pager information in each record for any contacts to whom you will be sending wireless messages.

When the phone field is shown on the Contact Manager screen, it will have a phone icon ( ) beside the number. The phone icon is used with the TeleMagic Dialing feature and not for Wireless Messaging. If you use this phone icon, TeleMagic will think that the number is a regular phone number and try to dial it.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_To_Set_up_the_Pager_and_Pager_ID_Key_Fields)<<1} To Set up the Pager # and Pager ID Key Fields:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# To Set up the Pager # and Pager ID Key Fields:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Options** menu, select **Preferences**.
2. Click the **Key Fields** tab.

   The Key Fields screen will open.
3. Using the `Key Fields for:` radio buttons at the top of this dialog box, select the level containing the contact records you want to page.
4. Click in the Selected Key field next to `Pager #` and select the field with the templating for Pager #  from the drop-down list. (See To Add Wireless Messaging Fields to a Database: for details on creating a field with the proper templating, if you have not already.)
5. Click in the Selected Key field next to `Pager ID` and select the pager ID field from the drop-down list.
6. If you have created pager number and pager ID fields for any other database levels, repeat steps 3 through 5 for those levels.
7. Click **OK** to save your changes.
8. If you want to establish a pager number and ID for any other databases, open those databases and repeat steps 1 through 7.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_to_Contacts)<<1} Sending Messages to Contacts
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

## Sending Wireless Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

There are a number of ways that Wireless Messaging can be used with other features in TeleMagic:

You can notify users of activities assigned to them in the Activity Manager, or create activities for yourself and store details in your own pager to take with you. If the activity is linked to a contact, you can even include contact information in the message. See: Sending Messages from the Activity Manager

You can send a wireless message to a TeleMagic user (or anyone else with a pager that can accept messages) from any contact record and include information concerning the contact in the message. See: Sending Messages from the Contact Manager

You can send a wireless message to a specific contact in your database. See: Sending Messages to Contacts

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

# Sending Wireless Messages from the Activity Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

If you are using the full capabilities of TeleMagic, you probably access the Activity Manager many times a day. Using Wireless Messaging, you can keep a link to your Activity Manager even when you are away from the office. If activities are frequently scheduled for you by others, you do not have to wait until you are working in TeleMagic to learn about them. You can be notified immediately, regardless of whether you are out of the office or just away from your desk. If you schedule activities for co-workers, you can rest assured that they will learn about them in a timely fashion. You do not have to worry about an activity being missed because someone did not know about it.

Before using Wireless Messaging, you may have copied details of activities occurring outside of the office onto paper to take with you when you left the office. With Wireless Messaging, you can send yourself details on any activity, such as the time of a meeting or the contact's address and phone number; you no longer have to be concerned about misplacing information.

For full instructions on using the Activity Manager, see the Activity Manager topic.

## To Use Wireless Messaging from the Activity Manager:

1. From the **Activity** menu, select **View Activities….**
2. If you are scheduling an activity, highlight the desired time for the activity on your schedule and click the Add button: ●

**or** If you are scheduling a To-Do, place the highlight anywhere in the To-Do section of your schedule and click the Add button.

The Activity or To-Do dialog box will open.

3. Add the activity or To-Do following the instructions in the Adding Activities or Adding To-Dos.
4. Click the **Assignment** tab. If another user will be completing this activity or To-Do, select the user from the `Assign to a single user` list or follow the instructions under Group Activities if a group of users will be sharing the activity.
5. Mark the `Page Users` check box.
6. When satisfied with your selections, click **OK**.

The Wireless Messaging dialog box will open.

The `Send To:`, `Pager #:`, and `Pager ID:` fields are based on the Wireless Messaging preference settings of the user to whom the activity is assigned. These settings will be dimmed and you will be unable to edit them from this screen. If the activity is assigned to a group, the `Pager #:` and `Pager ID:` fields will appear blank. The information will be referenced from the users' preferences when each page is ready to be sent. The message area at the top of the dialog box will default to include the User ID of the user who created the activity, the activity type, the current date and time, the description of the activity, and the activity comments if you have selected to include them in Wireless Messaging preferences. For more information see step 10 under To Set up Wireless Messaging to Send and Receive Messages.

7. Edit or complete the message by clicking in the message area and using standard word processing commands. (It is recommended that you delete any irrelevant information and only include the information absolutely necessary to the message.)

**Warning!**
Do not use braces ({}, also called curly brackets) in your message. The message will not be sent.

The message length will be displayed at the bottom of the dialog box.

8. If you have added to or edited the message in the message area, click **Update** to cause the message length to adjust to reflect your edits.

9. If the activity is linked to a contact and you want to have contact information included in the message, click **Paste Cont. Info**. The contact information will be appended to the end of the message.

10. Use the `Queue:` drop-down list to select where the wireless message is processed. If you select `Send Immediately (Local)` the message will be sent from your workstation. (This option is only available if you are set up to send wireless messages in Wireless Messaging preferences.) If you select a queue, the message will be processed by the server.

11. Click **Options** to open the Wireless Messaging Options dialog box.

    The `Notify On:` check boxes will default to your selections in Wireless Messaging preferences.

12. Edit the `Notify On:` check boxes if necessary. When marked, the `Completion` check box will cause a pop-up message to appear notifying you upon successful completion of the page. If the `Failure` check box is marked you will be notified if the page is unsuccessful and be given an error code explaining the reason for the failure.

    If the activity or To-Do is assigned to a single user, the `Baud Rate:` and `Packet Size:` fields will be based on the Preference settings of the user to whom the activity is assigned and cannot be edited. If the activity is assigned to a group of users, these settings will default to the lowest possible values.

13. If you know the minimum packet size and baud rate supported by the paging carriers used by *all* users in the user group to which the message is being sent, enter the minimum settings supported in the appropriate fields.

**or** If you do not know the minimum packet size and baud rate supported by the paging carriers for all users in the group, leave the default settings.

**WARNING!**
These default settings represent the minimum settings supported by paging carriers. You will not encounter problems using these settings, even if the individuals' paging carriers actually support higher settings. You will, however, encounter problems if you change these defaults to settings higher than the paging carriers can handle. *Do not* edit these defaults unless you are certain of the settings.

14. The `Number Of Retries:` field controls number of times a message should be attempted before failing and will default to your Wireless Messaging preference setting. Edit this if necessary.

15. Mark the `Monitor Transmission` check box if you want to view the progress of the transmission of your message. This will default to your Wireless Messaging preference setting.

    If you are queuing your message to be processed by the Automation Server you can enter a `Delay Until` time for the message. This will cause TeleMagic to hold the message in the queue until the specified time.

16. If you would like to delay processing from the server until a specified time, enter the date and time in the `Delay Until Date` and `Time` fields. The message will be held in the queue until the specified time.

    If you have Wireless Messaging key fields established in the Contact Manager, and you are sending this message to the queue, you have the option of sending to all contacts in a filter instead of to the recipient of the activity.

17. If you would like to send to all contacts in a filter, mark the `Use Filter` check box and select the filter from the drop-down list. (The message will not be sent to the recipient of the activity.)

18. Click **OK** to save your edits and return to the main Wireless Messaging dialog box.

**or** Click **Cancel** to discard any changes and return to the main Wireless Messaging dialog box.

19. When satisfied with your selections, click **Page**. The activity will be created and the message will be sent.

**or** If you want to discard your changes, click **Cancel**. The activity will be created, but no message will be sent.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Aborting_a_Wireless_Message)<<1} Aborting a Wireless Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_from_the_Contact_Manager)<<1} Sending Messages from the Contact Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_to_Contacts)<<1} Sending Messages to Contacts

# Sending Wireless Messages from the Contact Manager

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

There is a good chance that most of your day-to-day work in TeleMagic is performed in the Contact Manager. There will probably be times when you will need to contact a TeleMagic user for a reason not connected to an activity or warranting storage in e-mail. For example, you may simply need to request that a co-worker call you, or remind an assistant to pull a file for the following day. You can easily send messages from any level of any contact database.

This feature is especially beneficial to businesses that have sales people in the field or need to dispatch repair people or customer service representatives.

## To Send a Message from the Contact Manager:

1. From the **Office** menu, select **Send Wireless Message….**

**or** Click the Wireless Messaging icon on the toolbar.

- The Wireless Messaging dialog box will open.

- 2. Type the contents of your message in the message area using standard word processing commands.

**Warning!**
Do not use braces ({}, also called curly brackets) in your message. The message will not be sent.

3. If you would like to include contact information from the current contact record, click **Paste Cont. Info**. Contact information will be appended to the end of the current text.

   The message length will be displayed at the bottom of the dialog box as soon as you move out of the message area.

4. If you want to view the message length before moving out of the message area, click **Update** to cause the message length to adjust to reflect your message.

5. If you are sending the message to all contacts in a queue, do not make a `Send To:` selection. Sending to a filter will be covered in step 15, below.

**or** If you would like to send the message to an individual user, select the `User` radio button.

**or** Select the `User Group` radio button to select a user group. When a user group is selected, the message will be sent to every user in the group with wireless messaging information entered into his or her Wireless Messaging preferences.

6. Use the drop-down list in the `Send To:` field to select a user or a user group to receive the message. If you have selected the `User` radio button, this list will include all users who have set up Wireless Messaging preferences. If you have selected the `User Group` radio button, all user groups will be included in this list; users in the group who do not have wireless messaging set up in Preferences will be disregarded when the message is sent.

**or** If you would like to send a page to an individual not included on the user list (for example, someone who does not work in your office), make sure the `User` radio button is active and leave `Manual Entry` selected.

If you have selected a user from the drop down list, that user's pager number (carrier phone number) and pager ID (pager PIN) will appear in the `Pager #:` and `Pager ID:` fields; the fields will be unavailable for editing. If you have selected a user group, TeleMagic will read each user's wireless messaging preferences as the messages are sent; these fields will be blank and unavailable for editing. If you have selected `Manual Entry`, you must complete these fields.

7. If you have selected `Manual Entry` in the `Send To:` field, enter the appropriate information into the `Pager #:` and `Pager ID:` fields for the individual to whom you want to send the message.

8. Use the `Queue:` drop down list to select where the wireless message is processed. If you select `Send Immediately (Local)` the message will be sent from your workstation. (This option is only available if you are set up to send wireless messages in Wireless Messaging preferences.) If you select a queue, the message will be processed by the server.

9. Click the **Options** button to open the Wireless Messaging Options dialog box.

The `Notify On:` check boxes will default to your selections in Wireless Messaging Preferences.

10. Edit the `Notify On:` check boxes if necessary. When marked, the `Completion` check box will cause a pop-up message to appear notifying you upon successful completion of the message. If the `Failure` check box is marked you will be notified if the page is unsuccessful and be given an error code explaining the reason for the failure.

If a TeleMagic user was selected in the `Send To:` field, the `Packet Size:` and `Baud Rate:` fields will default to the Preference settings of the user to whom the message is being sent. You will be unable to edit this information. If `Manual Entry` or a user group was selected, these fields will default to the lowest value.

11. If you have selected `Manual Entry` and know the packet size and baud rate supported by the paging carrier used by the person to whom the page is being sent, enter them in the appropriate fields. If you have selected a user group, and know the settings for *all* users in the user group, enter the minimum settings supported in the appropriate fields.

**or** If you do not know the packet size and baud rate supported by the individual's paging carrier, or the settings for every user in the user group, leave the default settings.

**WARNING!**

These default settings represent the minimum settings supported by paging carriers. You will not encounter problems using these settings, even if the individual's paging carrier actually supports higher settings. You will, however, encounter problems if you change these defaults to settings higher than the paging carrier can handle. *Do not* edit these defaults unless you are certain of the settings.

12. The `Number Of Retries:` field controls the number of times a message should be attempted before failing and will default to your Wireless Messaging preference setting. Edit this if necessary.

13. Mark the `Monitor Transmission` check box if you want to view the progress of the transmission of your message. This will default to your Wireless Messaging preference setting.

    If you are queuing your message to be processed by the Automation Server you can enter a `Delay Until` time for the message. This will cause TeleMagic to hold the message in the queue until the specified time.

14. If you would like to delay processing from the server until a specified time, enter the date and time in the `Delay Until Date` and `Time` fields. The message will be held in the queue until the specified time.

    If you are paging to a queue and have your Wireless Messaging Pager ID and Pager # key fields established for this level of the database, you have the option of sending the message to all contacts in a filter.

15. To send to a filter, mark the `Use Filter` check box and select the desired filter from the list. This will override your `Send To:` settings and send the message to every contact in the specified filter who has wireless messaging information entered in the Pager # and Pager ID key fields.

16. Click **OK** to save your edits and return to the main

Wireless Messaging dialog box.

17. When satisfied with your selections, click **Page**. The message(s) will be sent.

**or** If you want to discard your changes, click **Cancel**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Aborting_a_Wireless_Message)<<1} Aborting a Wireless Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_from_the_Activity_Manager)<<1} Sending Messages from the Activity Manager

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_to_Contacts)<<1} Sending Messages to Contacts

# Sending Wireless Messages to Contacts

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

If you have created fields in your database to contain your contacts' pager numbers and pager IDs, it is possible to send wireless messages to your contacts. TeleMagic will use the information contained in these fields in the current contact record when you elect to send a wireless message. (Refer to the Adding Wireless Messaging Fields to Your Database topic for information on configuring your database to contain these fields.)

If you have not established fields to contain this information, you can use the `Manual Entry` option to send messages to your contacts. If you use `Manual Entry`, you will have to enter this information manually.

## To Send a Wireless Message to a Contact:

1. From the contact record of the contact to whom you want to send a message, select **Send Wireless Message…** from the **Office** menu.

**or** Click the Wireless Messaging icon on the toolbar.

The Wireless Messaging dialog box will open.

2. Type the contents of your message in the message area using standard word processing commands.

**Warning!**
Do not use braces ({}, also called curly brackets) in your message. The message will not be sent.

3. If you would like to include contact information from the current contact record, click **Paste Cont. Info**. Contact information will be appended to the end of the current text.

   The message length will be displayed at the bottom of the dialog box as soon as you move out of the message area.

4. If you want to view the message length before moving out of the message area, click **Update** to cause the message length to adjust to reflect your message.

   If there are `Pager #:` and `Pager ID:` fields in the contact database, the `Send To:`, `Pager #:`, and `Pager ID:` fields will default to information from the current contact record. This can be edited if necessary.

5. If you will be sending the message to the queue to be processed by the Automation Server and would like to send to all contacts in a filter, do not select from the `Send To:` radio buttons. Sending to a filter will be

covered in step 13.

**or** If you do not want to send the message to the current contact, use the `Send To:` drop-down list box to select a user (or `Manual Entry` to manually enter the paging information).

**or** Select the `User Group` radio button and select a user group from the drop-down list. When a user group is selected, the message will be sent to every TeleMagic user in the group with wireless messaging information entered in Preferences.

- If you are sending the message to the current contact, the `Pager #:` and `Pager ID:` fields will be filled in from the contact's record; this information can be edited if necessary.
- If you have selected a TeleMagic user, the `Pager #:` and `Pager ID:` fields will be filled in with information from the user's Preference settings; this information cannot be edited.
- If you have selected a user group, the `Pager #:` and `Pager ID:` fields will appear blank. Information from the Wireless Messaging preferences of each user in the user group will be filled in as the messages are sent; these fields cannot be edited.
- If you have selected the `Manual Entry` option, the `Pager #:` and `Pager ID:` fields will be blank; this information must be entered manually. Enter the appropriate information in the fields for the individual receiving the page.

6. Use the `Queue:` drop-down list to select where the wireless message is processed. If you select `Send Immediately (Local)` the message will be sent from your workstation. (This option is only available if you are set up to send wireless messages in Wireless Messaging preferences.) If you select a queue, the message will be processed by the server.

7. Click **Options** to open the Wireless Messaging Options dialog box.

   The `Notify On:` check boxes will default to your selections in Wireless Messaging preferences.

8. Edit the `Notify On:` check boxes if necessary. When marked, the `Completion` check box will cause a pop-up message to appear notifying you upon successful completion of the page. If the `Failure` check box is marked you will be notified if the page is unsuccessful and be given an error code explaining the reason for the failure.

   If a TeleMagic user was selected in the `Send To:` field, the `Packet Size:` and `Baud Rate:` fields will default to the Preference settings of the user to whom the message is being sent and cannot be edited. If the current contact, `Manual Entry`, or a user group was selected, these fields will default to the lowest value.

9. If you are sending the message to the current contact or `Manual Entry` and know the packet size and baud rate supported by the paging carrier used by that person, enter them in the appropriate fields. If you are sending the page to a user group and know the settings for all users in the group, enter the minimum supported settings in the appropriate fields.

**or** If you do not know the packet size and baud rate supported by the individual's paging carrier, or by the paging carrier for *all* users in a user group, choose the default settings.

**WARNING!**
These default settings represent the minimum settings supported by paging carriers. You will not encounter problems using these settings, even if the individual's paging carrier actually supports higher settings. You will, however, encounter problems if you change these defaults to settings higher than the paging carrier can handle. *Do not* edit these defaults unless you are certain of the settings.

10. The `Number Of Retries:` field controls the number of times a message should be attempted before failing and will default to your Wireless Messaging preference setting. Edit this if necessary.

11. Mark the `Monitor Transmission` check box if you want to view the progress of the transmission of your message. This will default to your Wireless Messaging preference setting.

    If you are queuing your message to be processed by the Automation Server you can enter a `Delay Until` time for the message. This will cause TeleMagic to hold the message in the queue until the specified time.

12. If you would like to delay processing from the server until a specified time, enter the date and time in the `Delay Until Date` and `Time` fields. The message will be held in the queue until the specified time.

13. If you are paging to a queue and would like to send the message to all contacts in a filter, mark the `Use Filter` check box and select the desired filter from the list. This will override your `Send To:` settings and send the message to every contact in the specified filter who has wireless messaging information entered in the Pager # and Pager ID key fields.

14. Click **OK** to save your edits and return to the main Wireless Messaging dialog box.

15. When satisfied with your selections, click **Page**. The

message will be sent.

**or** If you want to discard your changes, click **Cancel**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Aborting_a_Wireless_Message)<<1} Aborting a Wireless Message
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Maintenance)<<1} Wireless Messaging Maintenance
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_from_the_Activity_Manager)<<1}
Sending Messages from the Activity Manager
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Sending_Messages_from_the_Contact_Manager)<<1}
Sending Messages from the Contact Manager

# Wireless Messaging Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

When you send wireless messages locally, they are sent out immediately. When they are sent to a queue, they are held until a server can process them. However, even messages that are sent locally are placed in a temporary queue. In this way, if you have sent out a message, you do not have to wait until the message has completed sending to send out another; the second message will be held until the modem is free. This temporary local queue also allows you the ability to maintain messages that have been sent locally, aborting messages you do not want to send, or requeueing messages that have failed.

Aborting messages that have been queued to the server is covered in the Deleting Faxes and Wireless Messages topic.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Aborting_a_Wireless_Message)<<1} Aborting a Wireless Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Accessing_Wireless_Messaging_Maintenance)<<1} Accessing Wireless Messaging Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Local_Wireless_Messaging_Troubleshooting)<<1} Local Wireless Messaging Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½ADVANCED_Automation_Server_Troubleshooting)<<1} Automation Server Troubleshooting

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

# Aborting a Wireless Message

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

As you communicate using wireless messaging there may be times when you want to abort the transmission of a page. If you have queued the wireless message to the server, it can be aborted using the server's maintenance features. (See the Deleting Faxes and Wireless Messages topic for more information.)

If you have sent a wireless message locally, you can abort it from your local workstation.

## To Abort a Local Wireless Message Transmission:

1. Access the TM Pager-Dialing Terminal message box using the following guidelines:

   If you marked the `Monitor Transmission` check box in either Wireless Messaging Preferences or in the Wireless Messaging Options dialog box, the TM ENT Pager Dialing Terminal message box will appear after you sent your message and inform you of the transmission's progress.

   If you did not mark the `Monitor Transmission` check box in either Wireless Messaging Preferences or in the Wireless Messaging Options dialog box, you must access the TM ENT Pager - Dialing Terminal pop-up.

   - Press ALT+TAB once and a pop-up will appear showing icons representing all of the currently running programs. Continue pressing ALT+TAB until you have highlighted the pager icon, then release the ALT+TAB keys. The TM ENT Pager - Dialing Terminal message box will appear. If not, repeat this procedure again.

   The `Sending to:` field in the TM ENT Pager-Dialing Terminal message box will show to whom the transmission is being sent. (If the transmission is going to a group, the individual user names will not be shown.) The `Pager Number:` will show the carrier terminal numbers for each transmission.

2. Click **Abort**.

   A pop-up will appear asking you to confirm this choice.

3. Click **Yes** to stop the transmission. If the transmission is to an individual user or contact, the transmission will stop.

4. If the transmission is to more than one user, that transmission will stop and the next transmission will begin. Repeat steps 2 and 3 as needed for each user in the group.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Accessing_Wireless_Messaging_Maintenance)<<1}
Accessing Wireless Messaging Maintenance

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

# Accessing Wireless Messaging Maintenance

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Wireless Messagingï¿½ ï¿½ ï¿½ )<<1}

You can view a list of all wireless messages that are waiting to be sent locally using the Wireless Message Maintenance screen.

## To Use the Wireless Messaging Maintenance Screen:

1. From the **Options** menu, select **Maintenance**, **Wireless Messages…**.

   The Wireless Messaging Maintenance dialog box will open.

   This screen will show all of the pending wireless messages that have been sent from the local workstation. The status Active indicates the message that is currently being processed; Sent indicates the message was successfully sent; Queued indicates a message that is waiting to be processed; and Failed indicates a message that was unable to be processed. The Error Description indicates the reason for the failure. (See Local Wireless Messaging Troubleshooting for a description of possible error messages and their meanings.)

2. If you want to view details on any of the messages displayed, highlight it and click **Show Detail**.

   A Wireless Messaging screen will open.

3. When you have finished viewing details on the message, click **Close**.

   You will return to the Wireless Message Maintenance screen.

4. If you want to delete one of the displayed messages, highlight it on the list and click **Delete**.

**or** If you want to clear the queue, click **Delete All**.

   A message will appear asking you to confirm your decision to delete.

5. Click **Yes** to delete the message(s).

**or** Click **No** to retain the message(s).

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_Aborting_a_Wireless_Message)<<1} Aborting a Wireless Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WIRE_How_to_Use_Wireless_Messaging)<<1} Sending

Wireless Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|
_____154.BMP<JumpId(TM.HLPï¿½WIRE_Wireless_Messaging_Setup)<<1} Wireless Messaging Setup

## Note for Step 2

These settings will be in effect whenever you log into TeleMagic. If you try to send a wireless message when logged in at a different workstation, you may need to temporarily change the modem information settings (`Modem Type:`, `Com Port:`, `# of Retries:`, and `Page Send Options`) to match that workstation.

## Note for Step 1

For complete instructions on the Edit the Field List dialog box, see Creating and Defining Fields.

## Note for Step 9

You must enter the template exactly as shown.

## Note for Step 18

You must enter the template exactly as shown.

## Note for Step 2

If you do not have a contact database open, the Key Fields tab will not be available.

## Notes for Step 4

The `Assign to a single user` list will include all users who have granted you scheduling rights to their calendars, regardless of whether they are set up to receive wireless messages.

If you assign the activity to a group of users, all users in the group will receive the activity. Only those users who have Wireless Messaging set up in Preferences will receive the related wireless message.

## Note for Step 5

This check box will be dimmed if the user to whom the activity or To-Do is assigned is not set up to receive Wireless Messages. See the Wireless Messaging Setup topic for more information.

## Note for Step 7

You may add and edit text. However, formatting (such as carriage returns) will not be recognized.

## Note for Step 9

Contact information will already appear if you have selected `Paste Current Contact Info` in Wireless Messaging preferences or if you are including the Activity Comments and have used the **Paste Contact Info** button in the Activity Manager to paste the contact information into the `Comments` of the activity.

## Note for Step 10

Your Wireless Messaging preferences for sending messages will be used whenever you log into TeleMagic with your User ID, regardless of what workstation you are currently on. If you set up wireless messaging for a particular workstation and are currently working at another workstation, when sending locally make sure the modem type and COM Port match what you have set up. If not, edit your preferences to the current workstation's specifications.

## Note for Step 13

If the message length displayed on the main Wireless Messaging dialog box exceeds this packet size, the message will be broken up into multiple packets. Each packet will display the total number of packets for the message and give its page number. For example, if the message is divided into three packets, the first packet will display Page 1 of 3, the second will display Page 2 of 3, etc. The pages may not necessarily be received in order (based on your wireless messaging service provider).

## Note for Step 19

If you close TeleMagic while there are messages waiting to be sent, you will be warned of this fact before exiting. If you choose to exit TeleMagic while the messages are still pending, when you enter TeleMagic the next time you will be asked if you would like to process the queued messages. If you choose not to process the messages, they will remain in the queue until the next time you send a message. As soon as you send a message, all pending messages will be processed. If you do not want to process these pending messages, access Wireless Message Maintenance and delete the messages before you send another message.

## Note for Step 3

If you select a group of users, all users in the group will receive the e-mail. Only those users who have Wireless Messaging set up in Preferences will receive the related wireless message. Additionally, only users in the selected user group will receive the message. If you add any additional users, they will not receive the page.

## Note for Step 6

If you have selected a user who is not set up to receive wireless messages, or a group of users in which none of the users are set up to receive wireless messages, the `Page` check box will be dimmed.

## Note for Step 9

You may add and edit text. However, formatting such as carriage returns will not be recognized.

## Note for Step 11

If you have accessed the E-mail dialog box with no database open, this button will be dimmed.

## Note for Step 12

Your Wireless Messaging preferences for sending messages will be used whenever you log into TeleMagic with your User ID, regardless of what workstation you are currently on. If you set up wireless messaging for a particular workstation and are currently working at another workstation, when sending locally make sure the modem type and COM Port match what you have set up. If not, edit your preferences to the current workstation’s requirements.

## Note for Step 15

If the message length displayed on the main Wireless Messaging dialog box exceeds this packet size, the message will be broken up into multiple packets. Each packet will display the total number of packets for the message and give its page number. For example, if the message is divided into three packets, the first packet will display Page 1 of 3, the second will display Page 2 of 3, etc. The pages may not necessarily be received in order (based on your wireless messaging service provider).

## Note for Step 21

If you close TeleMagic while there are messages waiting to be sent, you will be warned of this fact before exiting. If you choose to exit TeleMagic while the messages are still pending, when you enter TeleMagic the next time you will be asked if you would like to process the queued messages. If you choose not to process the messages, they will remain in the queue until the next time you send a message. As soon as you send a message, all pending messages will be processed. If you do not want to process these pending messages, access Wireless Message Maintenance and delete the messages before you send another message.

## Note for Step 1

Contact information for the current contact will appear by default in the message area if you have selected `Paste Current Contact Info` in Wireless Messaging preferences.

## Note for Step 2

You may add and edit text. However, formatting such as carriage returns will not be recognized.

## Note for Step 8

Your Wireless Messaging preferences for sending messages will be used whenever you log into TeleMagic with your User ID, regardless of what workstation you are currently on. If have set up wireless messaging for a particular workstation and are currently working at another workstation, when sending locally make sure the modem type and COM Port match what you have set up. If not, edit your preferences to the current workstation’s requirements.

## Note for Step 11

If the message length displayed on the main Wireless Messaging dialog box exceeds this Packet Size, the message will be broken up into multiple packets. Each packet will display the total number of packets for the message and give its page number. For example, if the message is divided into three packets, the first packet will display Page 1 of 3, the second will display Page 2 of 3, etc. The pages may not necessarily be received in order (based on your wireless messaging service provider).

## Note for Step 17

If you close TeleMagic while there are messages waiting to be sent, you will be warned of this fact before exiting. If you choose to exit TeleMagic while the messages are still pending, when you enter TeleMagic the next time you will be asked if you would like to process the queued messages. If you choose not to process the messages, they will remain in the queue until the next time you send a message. As soon as you send a message, all pending messages will be processed. If you do not want to process these pending messages, access Wireless Message Maintenance and delete the messages before you send another message.

## Note for Step 1

Contact information will appear by default in the message area if you have selected `Paste Current Contact Info` in Wireless Messaging preferences.

## Note for Step 6

Your Wireless Messaging preferences for sending messages will be used whenever you log into TeleMagic with your User ID, regardless of what workstation you are currently on. If you set up wireless messaging for a particular workstation and are currently working at another workstation, when sending locally make sure the modem type and COM Port match what you have set up. If not, edit your preferences to the current workstation’s requirements.

## Note for Step 9

If the message length displayed on the main Wireless Messaging dialog box exceeds this Packet Size, the message will be broken up into multiple packets. Each packet will display the total number of packets for the message and give its page number. For example, if the message is divided into three packets, the first packet will display Page 1 of 3, the second will display Page 2 of 3, etc. The pages may not necessarily be received in order (based on your wireless messaging service provider).

## Note for Step 15

If you have chosen to send your wireless message locally and you close TeleMagic before the wireless message has been sent, the wireless message will be stored in a file and not sent at that time. When TeleMagic is opened the next time, the wireless message will be sent immediately.

## Hint for Step 4

You should periodically delete sent messages to streamline the display.

## Note for Step 5

If you close TeleMagic while there are messages waiting to be sent, you will be warned of this fact before exiting. If you choose to exit TeleMagic while the messages are still pending, when you enter TeleMagic the next time you will be asked if you would like to process the queued messages. If you choose not to process the messages, they will remain in the queue until the next time you send a message. As soon as you send a message, all pending messages will be processed. If you do not want to process these pending messages, access Wireless Message Maintenance and delete the messages before you send another message.

## Word Processing in TeleMagic

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

TeleMagic's word processor integration feature creates a link between TeleMagic and the most popular Windows-based word processing programs, Microsoft Word and WordPerfect. It also gives you an easy interface with the handy program in Windows, WordPad, enabling you to dash off those quick notes and memos that don't require full word-processing power.

The link between TeleMagic and your word processor lets you do more than simply access a word processor while working in TeleMagic; it allows you to merge up-to-the-minute information from TeleMagic into your documents. For example, you may send out a letter every month to 500 clients letting them know the status of their accounts. The word processing link lets you create one document that can be used for all 500 clients every month. You do this through the use of merge fields. Merge fields are special text entries that appear in the document in a format similar to this: <<Contact_Name_LVL2>>. (This example references the information contained in the Contact Name field on Level 2. Merge fields use field prompts, not Contact Key Fields.) When a document is printed, it is printed for either the current contact, or for all contacts in a filter. As TeleMagic prints the document, it will look for merge fields and will insert the information in the specified field from the contact record. In this way, you can have one document that goes to 500 different people, and contains information specific to each one.

In order to make full use of TeleMagic's word processor integration feature, you must:

Set up your writing preferences in the Writing preferences screen, specifying the name(s) and location(s) of your word processor(s). (This step is not necessary if you will only be using WordPad.) See the topic Setting Up a Word Processor for more information.

Create your word processing templates and documents using merge fields. See Creating a Merge Document or Template for instructions.

When ready, merge and print the documents. See Starting a Mail Merge for instructions.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Word_Processor_Document_Selection_Box)<<1} Word Processor Document Selection Box

# Word Processor Document Selection Box

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½WORD1_Word_Processor_Document_Selection_Box)<<1}

When working with TeleMagic's word processing integration, the main screen you will use is the Word Processor Documents selection box.

This selection box provides you with a list of your documents. From here you may work with existing documents by locating the document description, or you may add new documents.

When documents are created through TeleMagic you establish two things: the document and the document description. The document is the actual file. This file can be stored in any location you like and accessed outside of TeleMagic. The document description is the description of this document that TeleMagic references. When you want to access a document, you do not have to give TeleMagic the file name, the path to the document, and what word processor to use. This is all stored in the document description.

These document descriptions are sorted for you by TeleMagic. When you open the Word Processor Documents selection box, you will only see the documents that were created with your word processor(s). The word processor for a specific document can be determined by looking at the document's icon.

You can view word processing documents and templates simultaneously from the Word Processing Documents selection box. Templates are used to keep you from having to duplicate work. For example, if you use the same heading for all form letters, you can create a form letter template that uses that heading. When you later add documents, you can base the document on that template. The heading will be automatically entered into the document based on the template. For the most part, when you access the Word Processor Document selection box, you will be working with your documents. If you need to view or edit any of your templates, you can simply open the `Templates` folder.

Documents and templates are further sorted into three folders: Personal, Database, and Global. As each document (or template) is created, it is placed in one of these folders. If you have documents that should only be printed from a specific database, you can store them in the database documents folder and you will only be able to access them from that database. If you have documents that you want to keep personal, you can store them in the Personal Documents folder and only you will be able to access them. If you have documents that can be used in multiple databases that you want to share with all users, you can store them in the Global Documents folder. You may access each of these folders by expanding the `Documents` folder.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# Linking Documents to Contact Records

## To Link a Document to a Record in the Current Database and Level:

1. Open the Word Processor Documents dialog box, select the document, and click **Change**, or click **Add** to create a new document.

   The Change Document Description or Add a Document dialog box will open.

2. In the `Link to:` section of the dialog box, select the `Current Contact` radio button.

   The document will be linked to the current record. Click **Contact Info** to open a message box with the linked contact's information.

**or** Select the `Other Contact` radio button.

3. To search for a record in the current database and level, enter the information you are going to search for in the `Search` field and click **Search**.

**or** To search for a record using browse, click **Browse Contacts**.

   The Select a Contact dialog box will open. This is a standard Browse window listing all records on the current level.

4. Scroll through the list until you find the desired record.

5. Highlight any field of the record and click **Select**.

   The document will be linked to the selected record and the Select a Contact dialog box will close.

## To Link a Document to a Record in a Different Database or Level:

1. Open the Word Processor Documents dialog box, select the document, and click **Change**, or click **Add** to create a new document.

   The Change Document Description or Add a Document dialog box will open.

2. In the `Link to:` section of the dialog box, select the `Other Contact` radio button.

3. Click **Advanced Search**.

   The Advanced Contact Search dialog box will open.

4. Select the database containing the record you are searching for from the `Database:` drop-down list.

5. Select the level containing the record you are searching for from the `Level:` drop-down list.

6. Select an index from the `Index:` drop-down list. If you will be using Search to search for a record, select an index which includes the field containing the search criterion as the first field of its expression. If you will be using Browse to look for the record, this index will be used to sort the records in the browse window.

7. Enter the information to search for in the `Search for:` field and click **Search**.

   The document will be linked to the first record which meets the search criterion. If no match is found, you will be given the option of browsing for the record.

**or** Click **Browse**.

   The Select a Contact dialog box will open. The Select a Contact dialog box will open. This is a standard Browse window listing all records on the current level.

8. Scroll through the list until you find the desired record.

9. Highlight any field of the record and click **Select**.

   The document will be linked to the selected record and the Select a Contact dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# Setting Up a Word Processor

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½WORDX_Using_TM_Merge_Note)<<1}

Before using TM-Merge, you must first select which of the supported word processors you want to use. This is done in Writing preferences.

## To Select a Word Processor:

1. From the **Options** menu, select **Preferences**.

   The Preferences screen will open to the Activity preference set.

2. Click the **Writing** tab.

   The Writing preferences screen will open.

3. Select your word processors by marking the `Use Word Processor` checkboxes.

4. In the `Command Line` field, enter the path to the word processor, or click the elipsis button to locate it using a Windows Open dialog box.

   The `Working Directory` field allows you to establish a default location for your word processing documents. This will default to your user directory.

**Warning!**
TeleMagic does not support long file names. Do not set your working directory to one containing spaces or characters other than numbers, letters, and the period (.) character.

5. Edit the working directory, if necessary.

6. When satisfied with your selections, click **OK**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Creating_a_Merge_Document_or_Template)<<1}
Creating a Merge Document or Template
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add

# Creating a Merge Document or Template

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(tm.hlp>hintsï¿½WORDX_Using_Expressions_in_Merge_Documents)<<1}

Creating a merge document or template is a two step process. First, you have to add the document in TeleMagic. This includes giving the document a description, a name, and defining additional particulars concerning the document. This step will be the same no matter what word processor you are using. The second step is creating the document in the word processor. This step will vary slightly depending on which word processor you are using.

The following set of steps assumes that you have already established your word processor in Writing preferences. If not, TeleMagic will default to WordPad. For details on establishing your word processor, see Setting Up a Word Processor. .

## To Add a Merge Document or Template Using TeleMagic and Your Word Processor:

1. From the **Write** menu, select **Word Processing….**

   The Word Processor Documents dialog box will open.

2. If you are creating a document that you will be printing, open the `Documents` folder. If you are creating a framework for future documents, open the `Template` folder.

3. To create a new document or template, choose **Add**.

   The Add a Document dialog box will open.

4. If you are creating a new document, choose the **Document** radio button. If you are creating a new template, choose the **Template** radio button.

4. Select the word processor to use for the document or template from the `Word Processor` drop-down list.

5. In the `Description:` field, enter a description of the file as you want it to appear in the Word Processor Document selection box. (This is not the actual file name; it is a description by which you will recognize the file in the future.) The description can contain spaces and special characters.

6. In the **File name...** field, type the name of the file. This is the actual file name under which the document will be stored. The path to the file will default to your Writing Preferences, `Working Directory` selection. (See the Choosing the Location for Word Processing Files topic.) If you want to use a different path, enter it in the field. Enter a file name following the path.

**or** Click **File name...** and use the standard Windows File Open dialog box to select an existing file that was created in this word processor.

If you selected `Document` in step 4, above, the `Use this template:` pop-up list will be available.

7. If you want to base your document on an existing template, select it from the `Use this template:` list.

8. Choose from the `Store In:` radio buttons to control who has access to this document or template:

   - If you want the document to appear on your user specific list of documents and templates, select the `User` radio button. You will be the only user with access to this document or template.
   - If you want the document or template to appear on the global list of documents and templates, select the `Global` radio button. All users will have access to this document or template.
   - If you want the document or template to appear in the database-specific list of documents and templates, select the `Database` radio button. The document or template will be available to any users who are working in the current database.

9. Choose a level with which to associate your merge document from the `Merge Fields From Level:` radio buttons. (These radio buttons will reflect the names of the levels in the current database.) As a general rule, you will only have access to fields from that level or higher, so choose the lowest level from which you intend to pull fields. For example, if you will be using fields from Levels 1 and 2, select the Level 2 (`Contact`) radio button at this point. Do not choose Level 3 if you will not be using fields from this level.

   If you are creating this document for a specific contact, you may want to link it to the contact's record. The description of the document will be added to the list of linked documents for this contact that can be accessed from a rollup list or the View linked documents button ( • ) on the Contact Manager toolbar. (For more information on Document Rollup lists, see the Screen Designer: Document Rollup topic. For more information on the View linked documents button, see the Document Lists and History topic.)

10. If you do not want to link the document to a contact, leave the `No Link` radio button selected in the `Link to:` area.

**or** If the contact want to link to is the current contact, select the `Link with Current Contact` radio button.

**or** Select `Other Contact`.

Click here for information on completing the link.

11. If you want to use custom merge fields in this document, click **Custom Merge Fields**. Enter the name for the Custom Merge Field and select whether it should be a memo field.

12. When satisfied with your selections, click **OK**.

    You will then be placed in your word processor. If your word processor is not already open, it will be launched. If your word processor is already open, you will be switched to that screen to create the document or template.

13. If you are using Word for Windows 7.0 or Word 97, see To Create a Document in Word for Windows 7.0 or Word 97:

    If you are using Word for Windows 6.0, see To Create a Document in Word for Windows 6.0:

    If you are using Word for Windows 2.0, see To Create a Document in Word for Windows 2.0:
    If you are using WordPad, see To Create a Document in WordPad

# To Create a Document in Word for Windows 7.0 or Word 97:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

*Preliminary* If you are using Word 97, you must first install SR-1. This service release is available from the Microsoft web site at www.microsoft.com. To determine if SR-1 is already installed, open Word 97 and select **About Microsoft Word** from the **About** menu. The first line of this dialog box will indicate the highest service release that has been installed. You may have installed service releases subsequent to SR-1. If so, this requirement is met: SR-1 must be installed before the subsequent service releases can be installed.

**Warning!**

If you use Word 97 to create messages for Microsoft Outlook, do not use this procedure with an Outlook message open for editing in the background.

## To Create a Document:

1. If you have not done so already, follow the instructions under Creating a Merge Document or Template

   Word for Windows 7.0 or Word 97 will open and you will see that the mail merge toolbar has been added.

2. Type the body of the document or template using standard Word commands.

3. Place your cursor in the document where you want information from a merge field to appear.

4. In Word 97, click **Insert Merge Field**.

   The drop-down merge field list will open.

   **or** In Word 7.0, press ALT+SHIFT+F to bring up TeleMagic’s Merge Field dialog box.

   The merge field list will open.

   The merge field list will display all available fields. The level on which each field appears in the database will be indicated by LVL1, LVL2, or LVL3 in this list.

5. Use the scroll bar in Word 7 to view additional fields on the list. Click on the arrow at the bottom of the list in Word 97 to view additional fields. Select the field you want to insert in the document, keeping in mind that:

   - The first five options on this list are directives used for documents that will be faxed. They are discussed in detail in the Creating a Fax Cover Page topic.
   - When adding the document description, you were required to select a merge level for the document. You will not be able to select fields from a lower level than the one you selected. (In other words, if you selected Level 2, you will not be able to use Level 3 fields.) If you discover you must use fields from a lower level, see the Changing Word Processor Documents and Templates topic for instructions on adjusting the

document level.

- OLE fields will not be available for merging;
- Logical fields (check box fields) will return “Yes” or “No” when merged;
- As is standard TeleMagic practice, a memo (notepad) field will return all information in the notepad up to but not past any set of double slash // characters found in the notepad itself. This allows you to limit the amount of data that is merged from the notepad.

6. Click on any field to insert that TeleMagic field into your new document.

7. Repeat steps 3 to 6 as needed. Remember, each merge field is a placeholder for information which will change from document to document.

8. When the document or template is complete, save it by selecting **File**, **Save**.

9. Exit Word for Windows by selecting **File**, **Exit** and return to TeleMagic.

   If you created a document, it will now be available for printing. If you created a template, it will now be available in the list of templates in the Add a Document dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# To Create a Document in Word for Windows 6.0:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, follow the instructions under Creating a Merge Document or Template

   Word for Windows will open and you will see that the mail merge toolbar has been added.

2. Type the body of the document or template using standard Word 6.0 commands.

3. Place your cursor in the document where you want information from a merge field to appear.

4. Press ALT+SHIFT+F.

•

•

   The Microsoft Word's Insert Merge Field dialog selection box will open. It will display all available fields. The level on which each field appears in the database will be indicated by LVL1, LVL2, or LVL3 in this list.

**or** Click on the **Insert Merge Field** button. A menu will open with all available merge fields listed.

5. Select the name of any field, keeping in mind that:
   - The first five options on this list are directives used for documents that will be faxed. They are discussed in detail in the Creating a Fax Cover Page topic.
   - OLE fields will not be available for merging;
   - Logical fields (check box fields) will return “Yes” or “No” when merged;
   - As is standard TeleMagic practice, a memo (notepad) field will return all information in the notepad up to but not past any set of double slash // characters found in the notepad itself. This allows you to limit the amount of data that is merged from the notepad.

6. Choose **OK** to insert that TeleMagic field into your new document.

7. Repeat steps 3 to 6 as needed. Remember, each merge field is a placeholder for information which will change from document to document.

8. When the document or template is complete, save it by selecting **File**, **Save**.

9. Exit Word 6.0 for Windows by selecting **File**, **Exit** and return to TeleMagic.

If you created a document, it will now be available for printing. If you created a template, it will now be available in the list of templates in the Add a Document dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

## To Create a Word Insert-Merge-Field Macro:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. From the Word menu select **Tools**, **Macro....**
2. Enter a name in the `Macro Name` field and click **Create**.

   The following data will appear in the left-hand corner of your screen:

   ```
   Sub·MAIN¶
   |¶
   End·Sub¶
   ```

3. At the cursor (on the second line) type the following:

   ***`SendKeys "%F", -1`***

   (make sure to insert spaces between SendKeys and the quotation marks, and the comma and -1)

4. From the Word menu, select **File**, **Close**.
5. Choose **Yes** to the message asking you to save the changes.
6. From the Word toolbar, select **Tools**, **Customize....**
7. From the `Categories:` field, select `Macros`.

   A list of existing Word macros will become available.

8. Highlight the macro you created from the list on the right and drag it up to the mail merge toolbar.
9. From the Button selection box, select the picture of the tool you want to use and click **Assign**.

**or** Choose **Edit** and design your own tool then click **OK**.

The tool will appear on the mail merge toolbar.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Create_a_Document_in_Word_for_Windows_7_0)<<1} To Create a Document in Word for Windows 7.0:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Create_a_Document_in_Word_for_Windows_6_0)<<1} To Create a Document in Word for Windows 6.0:

# To Create a Document in Word for Windows 2.0:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, follow the instructions under Creating a Merge Document or Template

   Word for Windows 2.0 will open, displaying a print merge toolbar.

2. Type the body of the document or template using standard Word 2.0 commands.

3. Click **Insert Merge Field....**

**or** Press ALT+SHIFT+F.

   The Insert Merge Field selection box will open. It will display all available fields. The level on which each field appears in the database will be indicated by LVL1, LVL2, or LVL3 in this list.

4. Place your cursor in the document where you want information from a merge field to appear.

5. Select the name of any field and choose **OK** to insert that TeleMagic field into your new document. Keep in mind that:

   - The first five options on this list are directives used for documents that will be faxed. They are discussed in detail in the Creating a Fax Cover Page topic.
   - OLE fields will not be available for merging;
   - Logical fields (check box fields) will return “Yes” or “No” when merged;
   - As is standard TeleMagic practice, a memo (notepad) field will return all information in the notepad up to but not past any set of double slash // characters found in the notepad itself. This allows you to limit the amount of data that is merged from the notepad.

6. Repeat steps 3 to 5 as needed. Remember, each merge field is a place holder for information which will change from document to document.

7. When the document or template is complete, save it by selecting **File**, **Save**.

8. Exit Word for Windows by selecting **File**, **Exit** and return to TeleMagic.

   If you created a document, it will now be available for printing. If you created a template, it will now be available in the list of templates in the Add a Document dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# To Create a Document in WordPerfect 8.0:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

**Warning**

WordPerfect conversion filters must be included in your installation of WordPerfect to use merge fields. To install conversion filters from the WordPerfect CD, follow the installation wizard for a custom installation. When you come to the Custom Installation step, select Accessories from the list of components and click **Components….** From the Accessories step, select Conversions, Viewers, Tools and click **Components….** Fully mark the Conversion Filters checkbox. (This checkbox can be fully selected, partially selected, or not selected. When fully selected, it will display a black check mark on a white background.) You can add the required components to an existing installation following the same procedure.

1. If you have not done so already, follow the instructions under Creating a Merge Document or Template

   WordPerfect 7.0 will open, showing a print merge toolbar.

2. Type the body of the document or template using standard WordPerfect commands.

3. Click **Insert Field** to start the conversion process. A Field Name dialog box will appear. The level on which each field appears in the database will be indicated by LVL1, LVL2, or LVL3 in this list.

4. Place your cursor in the document where you want information from a merge field to appear. Select the name of any field and choose **Insert** to insert that TeleMagic field into your new document.

5. Repeat steps 3 and 4 as needed. Remember, each merge field is a place holder for information which will change from document to document. Remember too that:

   - The first five options on this list are directives used for documents that will be faxed. They are discussed in detail in the Creating a Fax Cover Page.
   - OLE fields will not be available for merging;
   - Logical fields (check box fields) will return “Yes” or “No” when merged;
   - As is standard TeleMagic practice, a memo (notepad) field will return all information in the notepad up to but not past any set of double slash // characters found in the notepad itself. This allows you to limit the amount of data that is merged from the notepad.

6. When you have added all the fields to your document, select **Close** to close the Insert Field Name or Number dialog box. If you ever need to re-open this dialog box, click **Insert Field** on the toolbar.

7. When the document or template is complete, save it by

selecting **File**, **Save**.

8. Exit WordPerfect by selecting **File**, **Exit** and return to TeleMagic.

   If you created a document, it will now be available for printing. If you created a template, it will now be available in the list of templates in the Add a Document dialog box.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# Quick Letter

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TM.HLP>hintsï¿½WORDX_Quick_Add_Hint)<<1}

Once you are familiar with adding documents in your selected word processor, you may choose to perform a quick add. Quick Letter bypasses the main Add a Document dialog box. You are instead given an Add a Letter dialog box where you can define the description and name of the document. The document will be added in the User list to the current merge level, and linked to the current contact. Additionally, the current contact's standard address information will be merged into the letter.

**Warning!**
If you use Word 97 as your default word processor in TeleMagic, and you use Microsoft Exchange as a mail client, do not start a Quick Letter while composing a message in Microsoft Exchange. If you do so, errors will be generated and your Quick Letter information will be added to the message you are composing in Exchange. Save your composition and close the new message in Exchange before starting a Quick Letter.

## To Start a Quick Letter:

1. From the **Write** menu, select **Quick Letter**.

   The Add a Letter dialog box will open.

2. Enter a description for your document in the `Description:` field.

3. Enter a file name for your document in the `File Name` field.

   When you print a document using the **Print** button on the Word Processor Document selection box, you have the option of creating an activity based on the print merge. This requires that the print merge be launched from within TeleMagic. When creating a quick letter, you have the option of informing TeleMagic that you will be launching the print merge directly from the word processor. This allows you to bypass the steps of saving the document, returning to TeleMagic, and launching the print merge from there.

4. If you will be printing this document from within the word processor at the time you create it and want an activity created based on the print merge, mark the `Log in Document History` check box. This will cause an activity to be created and a record of the print recorded in the contact's document history.

**or** If you will not be printing directly from the word processor, leave this box empty.

5. Click **OK**.

   You will be placed in your default word processor. The contact's standard address will be merged into the letter, by default. If your word processor is not already open, it will be launched. If your word processor is already open, you will be switched to that screen to create the document or template.

6. If you are using Word for Windows 7.0 or Word 97, see To Create a Document in Word for Windows 7.0 or Word 97:

   If you are using Word for Windows 6.0, see To Create a Document in Word for Windows 6.0:

   If you are using Word for Windows 2.0, see To Create a Document in Word for Windows 2.0:

# Starting a Mail Merge

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

In order to start a mail merge, you should already have:
Selected your Word Processor (Word for Windows or WordPerfect) in Writing preferences;

Created a document in the word processor and included all merge fields;

Decided what contact or group of contacts should receive the letter.

This section assumes that you have already created a document and are ready to actually perform a merge. If you have not created a document, refer to Creating a Merge Document or Template.

### To Send Form Letters Using TeleMagic and Your Word Processor:

1. If you want to print a document for a single contact, go to that contact's record.

**or** If you want to print multiple copies for all contacts in a filter, open the database containing the records for which you want to print.

2. From the **Write** menu, select **Word Processing**.

   The Word Processor Documents selection box will open.

3. Locate the document or template you want to print in the tree view.

4. Highlight the desired document or template and click **Print**.

**WARNING!**
Prior to TeleMagic for Windows V2.0, merge fields were identified by their field level followed by their field name. This convention was available as an option through V3.*x*. This format is not supported in TeleMagic V4. If you have upgraded from a version prior to V2.0, or you are upgrading from a subsequent version and were using the Backward Compatible option, you must change all of your merge fields to the current format of *field name* followed by *level* to be able to use these documents.

The Print Options dialog box will appear.

5. If this document is linked to a contact record, select `Linked Record` to print for the linked record. (This radio button will be dimmed if the record is not linked.)

**or** Select the `Current Record` radio button to print for the current contact.

**or** Select `Filtered Records` to print for all records in a filter.

If you select `Filtered Records`, the `Filter` and

`Index` fields will become available. These will default to the filter and index currently active in the Contact Manager.

6. If you want to send the documents to a group of records other than the filtered group currently in use in the Contact Manager, select the appropriate filter from the `Filter:` drop-down list.

7. If you want to print the documents in an order other than that defined by the index currently in use in the Contact Manager, select the appropriate index from the `Index:` drop-down list.

8. If you want to send the document to a print queue where it will be processed by the Automation Server, mark the `Send to Print Queue` check box and select the desired queue from drop-down list.

**or** If you want to print the document from your local workstation using your default printer, leave this check box unmarked.

9. If you are printing locally for the current or linked record and want to preview the document in the word processor before printing, mark the `Preview Merge` check box. (This check box will be dimmed if you have selected `Filtered Records` and/or `Send to Print Queue`.)

10. If you want to use the default stamp, skip to step 14.

**or** Click **Stamp Options**.

The Stamp Options dialog box will open.

The date, time, User ID, and user name must be included in all stamps for synchronization purposes. Any other information may be added to or removed as necessary.

11. Edit the text area as necessary.

If you have `Stamp Notepad on Merge` selected in Writing preferences, the `Stamp Notepad` check box will be marked by default. If you have `Create Activity When Printing` selected in Writing preferences, the `Create Activity` check box will be marked by default.

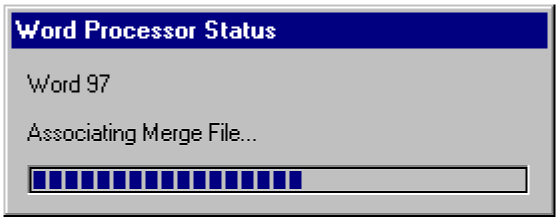
12. Mark or unmark the tracking check boxes as necessary.

13. Click **OK** to save the stamp information.

14. Click **OK** to print.

If you selected not to preview the merged document, your word processor will open and TeleMagic will send the command to print. Depending upon the word processor you are using, a print dialog box may open. If this occurs, click **OK** to send the document(s) to the printer. If this does not occur, the documents will be sent automatically. Exit the word processor when completed to return to TeleMagic.

**or** If you selected to preview the merged document, your records will be automatically merged with the document in your word processor. A status indicator will appear while this occurs.




**Status Indicator**

15. Start the merge as follows:
    - If you are using Word for Windows 7.0 or Word 97...
    - If you are using Word for Windows 6.0...

    If you are using Word for Windows 2.0...

## Printing from Word 7.0 or Word 97

Select **File**, **Print...** from the Word menu.

The Windows Print dialog box will open.

At this point you can change any printer setting you need to change. (For more information on how to do this, see your Word for Windows Manual.) Choose **OK** to print your documents(s).

## Printing from Word 6.0

Select **File**, **Print...** from the Word menu.

The Windows Print dialog box will open.

At this point you can change any printer setting you need to change. (For more information on how to do this, see your Word for Windows Manual.) Choose **OK** to print your documents(s).

## Printing from Word 2.0

Select **File**, **Print...** from the Word menu.

The Windows Print dialog box will open.

At this point you can change any printer setting you need to change. (For more information on how to do this, see your Word for Windows Manual.) Choose **OK** to print your document(s).

# Maintaining the List of Documents

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

### Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Changing_Documents_and_Templates)<<1} Changing Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Copying_Documents_and_Templates)<<1} Copying Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Deleting Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# Changing Documents and Templates

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

Changing documents and templates actually involves two things: changing the details of the document or template – such items as its description, link information, and associated level -- and changing the contents of the document or template, that is, changing the actual text of the document itself.

## Select a Topic:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Details_of_a_Document_or_Template)<<1} To Change the Details of a Document or Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Details_of_a_Document_or_Template)<<1} To Change the Contents of a Document or Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Contents_of_a_Document_or_Template)<<1} Copying Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Copying_Documents_and_Templates)<<1} Deleting Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# To Change the Details of a Document or Template:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Write** menu, select **Word Processor**.
2. Locate the item you want to edit and highlight it.
3. Click **Change**.

   The Change Document Description dialog box will open.
4. If you want to change the document description, enter a new description in the `Description:` field.
5. If you want to use a different document, enter it in the **File Name** field. If you enter a new file name, it will be created. If you enter the name of an existing file, that file will be used.
6. If you want to store the document on a different list, select from the `Documents:` radio buttons using the following guidelines:
   - If you want the document to appear on your user specific list of documents or templates, select the `User` radio button. You will be the only user with access to this document or template.
   - If you want the document or template to appear on the global list of documents or templates, select the `Global` radio button. All users will have access to this document or template.
   - If you want the document or template to appear in the database specific list of documents or templates, select the `Database` radio button. The document or template will be available to any users who are working in the current database.

   The `Merge Fields From Level:` radio buttons will default to the selection made for the original document.
7. If you will be changing this document or template to contain fields from a different level than the one currently selected, select it from the `Merge Fields From Level:` radio buttons.

**WARNING!**
Exercise caution when changing the Level. Unless you will be changing the fields contained in the document, you should not change this setting. The selected level should reflect the lowest level from which TeleMagic is required to pull data when printing this document or a document based on this template.

8. If you want to change the record to which this document is linked, you may do so using the `Link to:` radio

buttons. (See Linking Documents to Contact Records for instructions.)

9. Click **OK** to save your changes.

**or** Click **Cancel** to close the Change Document Description dialog box without saving your changes.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Details_of_a_Document_or_Template)<<1} To Change the Contents of a Document or Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Contents_of_a_Document_or_Template)<<1} Copying Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Copying_Documents_and_Templates)<<1} Deleting Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# To Change the Contents of a Document or Template:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. From the **Write** menu, select **Word Processing**.
2. Locate the item you want to edit and highlight it.
3. Click **Edit**.

   You will be taken to the word processor in which the document was created.

**Warning!**
If you have a copy of Microsoft Word running externally to TeleMagic and you open a document from TeleMagic, the document will be opened in the running copy of Word if possible. I.e.; If the document was created in the same version or an earlier version of Word as the copy that is running, it will be opened in the running copy. If a document created in an earlier version of Word is opened in a later version, it is possible that the document will be converted to the newer format. If this happens, the document can no longer be opened in the version in which it was originally created. Caution is required if you need to maintain Word documents created in different versions of Word.

4. Edit the document as necessary.
5. When you have finished editing the document or template, save the document as you normally would for the selected word processor.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Details_of_a_Document_or_Template)<<1} To Change the Details of a Document or Template:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_To_Change_the_Contents_of_a_Document_or_Template)<<1} Copying Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Copying_Documents_and_Templates)<<1} Deleting Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# Copying Documents and Templates

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

There may be times when you want to create a document or template that contains information similar to an existing document or template. You can then make a copy of an existing document or template which can then be edited without affecting the original.

## To Copy a Word Processor Document or Template:

1. From the **Write** menu, select **Word Processing**.

   The Word Processor Documents selection box will open.

2. From the tree view, locate the document or template you want to copy and highlight it.

3. Click **Copy**.

   The Copy a Word Processor Document dialog box will open.

   The `Description:` field will contain the description of the original word processor document or template as it appears in the Document selection box.

4. Enter a new description for the copied file in the `Description:` field.

   The **File Name...** field gives the path to the original file.

5. Enter a unique name for the file in the **File name...** field. (This is the actual name under which the file will be stored.)

   The drive and directory information does not need to be edited unless you want to store this file in a different location.

6. If you want to change the drive or directory information, enter the new path.

   The `Documents:` radio buttons control who will have access to this document or template. This will default to the list used by the document you are copying.

7. If you want to store the copy on a different list (user, global, or database), select it from the `Documents:` radio buttons using the following guidelines:

   - If you want the document to appear on your user specific list of documents and templates, select the `User` radio button. You will be the only user with access to this document or template.
   - If you want the document or template to appear on the global list of documents and templates, select the `Global` radio button. All users will have access to this

document or template.

- If you want the document or template to appear in the database specific list of documents and templates, select the `Database` radio button. The document or template will be available to any users who are working in the current database.

The `Merge Fields From Level:` radio buttons will default to the selection made for the original document.

8. If you will be changing this document or template to contain fields from a different level than the one currently selected, select it from the `Merge Fields From Level:` radio buttons.

**WARNING!**

Exercise caution when changing the Level. Unless you will be changing the fields contained in the document, you should not change this setting. The selected level should reflect the lowest level from which TeleMagic is required to pull data when printing this document or a document based on this template.

9. If you want to change the record to which this document is linked, you may do so using the `Link to:` radio buttons. (See Linking Documents to Contact Records for details.)

10. Click **OK** and a copy of the document or template will be created.

**or** Click **Cancel** to close the Copy a Word Processor Document dialog box without copying the file.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Changing_Documents_and_Templates)<<1} Changing Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Deleting Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# Deleting Documents and Templates

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

## To Delete a Document or Template:

1. From the **Write** menu, select **Word Processing**.

   The Word Processor Documents dialog box will open.

2. From the tree view, locate the document or template you wish to delete and highlight it.

3. Click **Delete**.

   The Delete Document? dialog box will open.

4. If you want to delete both the description and the actual file, mark the `Delete File From Disk As Well As TelaMagic` radio button, and click **OK**.

**or** To delete only the description as it appears in the Word Processor Document selection box, mark the `Delete File From TeleMagic Word Processing Only` radio button, and click **OK**.

**or** To exit this dialog box without deleting anything, click **Cancel**.

5. To exit the Word Processor Document selection box, click **Close**.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Changing_Documents_and_Templates)<<1} Changing Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Copying_Documents_and_Templates)<<1} Copying Documents and Templates

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

# Working with Linked Documents

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

Linking a document to contact records allows you to track documents that are created specifically for a particular contact. This provides two benefits: at the Word Processor Document selection box you can view information related to the contact, or go directly to the linked contact's records; in the Contact Manager, you can view a list of documents linked to a contact and access the document from the contact's record.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge for information on printing a document for the linked contact.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Viewing_Contact_Information)<<1} Viewing Contact Information

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Document_Lists_and_History)<<1} Document Lists and History

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

# Viewing Contact Information

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

When a document is linked to a contact record, you can easily access information about the record, or even the record itself, from the Word Processor Document selection box.

## To View Linked Contact Information:

1. From the **Write** menu, select **Word Processing**.

   The Word Processor Documents selection box will open.

2. Find the linked document in the tree structure and highlight it.

3. To view contact information, click **Contact Info**.

   The Contact Information screen will open.

4. If you want to view the contact's notepad, click **View Notepad**. A view-only window will appear where you can review any notes associated with the contact. When you are done viewing the notepad, press ESC or double-click the control box to close the window.

5. When you have completed viewing the contact information, click the Close button in the upper-right hand corner of the viewnote window.

   **or** Open the File menu by clicking in the upper-left hand corner of the viewnote window and select **Close**.

   You will be returned to the Contact Information Screen.

6. Click **OK**.

   You will be returned to the Word Processor Documents dialog box.

7. If you want to go to the contact record, click **To Contact**.

   The Word Processor Document selection box will close and you will be taken to the associated record in the Contact Manager.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½WORD1_Document_Lists_and_History)<<1} Document Lists and History
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.BMP|______154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a

Document or Template using TM-Merge

# Document Lists and History

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

From the Contact Manager, you can access information about documents that have been created specifically for a particular contact. In addition to being able to create a rollup list of documents linked to a contact using the Screen Designer, you can view a similar list directly from the Contact Manager Toolbar. You can also view a history of the documents that were mailed or faxed to any contact. (See Screen Designer: Document Rollup for more information on adding a rollup list to the contact page.)

## To View a List of Linked Documents:

1. Go to the record of the contact whose linked documents you want to view.
2. On the Contact Manager toolbar, click the View linked documents button:

   The Linked Documents dialog box will open.

   This dialog box will list the document descriptions, when the document was created, the User ID of the user who created the document, and the list that contains the document (user, global, or database).
3. If you want to print a copy of the document, click **Print**. The Print Options dialog box will open.
4. If you want to go to the Word Processor Document selection box where you can view, print, or edit the document, click **To Word Proc**.

   The Word Processor Documents selection box will open to the appropriate list with the document highlighted.
5. If you want to view a history of documents that have been printed or faxed for this contact, click **History**.

   The Document History screen will open.

   The list of documents printed or faxed for the contact is generated from the related activities. In order for a document to be reflected in this list, the user who printed the document must have `Create Activity When Printing` selected in Writing preferences, or, in the case of faxing, have selected `Create Activity` in the Send Fax dialog box. Documents will be listed with the most recently sent at the top of the list.
6. If you want to see your sent documents in order with the oldest first, select the `Ascending` radio button. If you want to see your sent documents in order with the most recent first, select the `Descending` radio button.
7. To view details taken from the related activity for a document, highlight the document and click **View Detail**.

The Document History Detail dialog box will open.

8. When you have finished viewing the document history details, click **Close**.

   You will be returned to the Document History dialog box.

9. Click **Close** to return to the Linked Documents dialog box.

10. Click **Close** to return to the Contact Manager.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Viewing_Contact_Information)<<1} Viewing Contact Information
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

# Converting DDE Documents to the Current Merge Format

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

Previous versions of TeleMagic Enterprise offered DDE merge capability for word processing documents. This functionality has been replaced. If you are an upgrade user and have existing documents created using DDE merge, you must update them to the new format to continue using them in V4.

This section assumes that you have set the path to your word processor in Writing preferences. If you have not, see TM-Merge Setup.

## To Convert a DDE Document to the Current Version Merge Format:

1. From outside of TeleMagic, access the word processor used to create the document and open the document.
2. Select the entire document, including all merge fields.
3. Press CTRL+C to copy the data to the clipboard.
4. Exit the word processing program and open TeleMagic.
5. Add a document following the instructions in Creating a Document or Template using TM-Merge giving your document a new name and description.

   When you save the document description, your word processor will launch.
6. With your cursor at the top of the document, press CTRL+V. This will paste the contents of the clipboard into the document.

   You must now replace each DDE merge field with merge field in the current format.
7. Go to the first field in the document. Note the field name, then delete it.
8. Insert the field you have just deleted.

   Depending on which word processor you are using, you will use a different method to insert a new field. If you need instructions on inserting merge fields using your word processor, see:

   To Create a Document in Word for Windows 2.0,

   To Create a Document in Word for Windows 6.0,
9. Repeat steps 7 and 8 for each field in the document.
10. When finished, save the file, and exit to TeleMagic.
11. Repeat steps 1 through 10 for each document you want to convert.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Deleting_Documents_and_Templates)<<1} Creating a Document or Template using TM-Merge

# To Create a Document in Word Pro 97

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, follow the instructions under Creating a Merge Document or Template
2. Word Pro 97 will open in the Merge Assistant.
3. Compose the letter. Insert merge fields by selecting them from the list on the Merge Assistant toolbar.
4. Click **Done** when finished.

   The Merge Assistant will proceed to step 3.
5. Select from the available options. See your Word Pro 97 documentation for more information on the Merge Assistant.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# Using Custom Merge Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

Custom Merge Fields are used to insert information into your merge documents which is not stored in your database. For example, if you conduct meetings with a group of contacts at irregular intervals in a variety of different locations. In this case, you would need some way of including the date, time, and place for the upcoming meeting.   Custom Merge Fields are document-specific; you must create a set of Custom Merge Fields for each document that you will be using with this feature.

## To Use Custom Merge Fields:

1. From the Write menu, select Word Processing.

   The Word Processor Documents dialog box will open.

2. Select the document containing the Custom Merge Fields.

3. Click Print.

   The Merge Fields Values dialog box will open.

4. Enter the required information in the available fields. This will depend on what fields you have created and how they are used.

5. When all required information has been entered, click Finish.

   The Merge Fields Values dialog box will close and the Print Options dialog box will open.

6. Complete the printing process. See the online help for more information on using the Print Options dialog box.

   The document will be printed with the custom merge information inserted.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½WORD1_Creating_Custom_Merge_Fields)<<1} Creating Custom Merge Fields

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# Creating Custom Merge Fields

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

## To Create Custom Merge Fields:

1. From the Write menu, select Word Processing.

   The Word Processor Documents dialog box will open.

2. If you are creating a new document, click Add and create the new document according to the instructions in the To Add a Document or Template topic.

**or** Select the document with which you will be using the Custom Merge Field(s) from the list and click Change.

   The dialog box opens will depend on whether you are creating a new document or template, or are changing an existing one.

3. Click Custom Merge Fields.

   The Custom Merge Fields dialog box will open:

4. Click New Field.

   The Add a Merge Field dialog box will open.

5. Enter the name of the new merge field in the Field Name: field.

6. If this will be a memo field, mark the This is a memo field checkbox.

7. Click OK.

   The Add a Merge Field dialog box will close and the new Custom Merge Field will be added to the list of Custom Merge Fields.

8. Repeat steps 4 through 7 for each additional Custom Merge Field that you want to add to this document.

9. Click Exit.

   The Custom Merge Fields dialog box will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(tm.hlpï¿½WORD1_Using_Custom_Merge_Fields)<<1} Using Custom Merge Fields
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

# To Create a Document in WordPad

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Word Processingï¿½ ï¿½ ï¿½ )<<1}

1. If you have not done so already, follow the instructions under To Add a Document or Template Using TM-Merge and Your Word Processor.

   WordPad will open. Notice that there is now a `WordPad` menu in the upper-left corner of the WordPad screen, above the standard WordPad menu bar.

2. Compose the message as you normally would. See the instructions that follow for how to add merge fields and expressions to your document. The instructions regarding adding merge fields and expressions can be accomplished in any order.

3. To add a merge field, select **Field List** from the `WordPad` menu.

   The Available Merge Fields dialog box will open. The items above the line are standard fields that can be added to any document. The items below the line are specific to the current database.

4. Select the field that you want to add to the document and click **Select**.

   The selected field will be inserted into the document.

5. To add an expression to the document, select **Expression** from the `WordPad` menu.

   The Expression Builder will open. For more information on creating expressions, see Expression Builder.

6. When you are satisfied with the new document, select **Save** from the `WordPad` menu.

When you create a WordPad document from TeleMagic, it will be saved in RTF format. WordPad documents must be in RTF format to be used with TeleMagic. This is not the default WordPad format. If you have created WordPad documents directly in WordPad that you want to use with TeleMagic, insure that they are in RTF format. You can convert a WordPad document to RTF by opening the document in WordPad, selecting **Save As** from the `File` menu, and selecting `Rich Text Format (RTF)` from the Save as Type drop-down list.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Starting_a_Mail_Merge)<<1} Starting a Mail Merge

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Quick_Add)<<1} Quick Add

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Working_with_Linked_Documents)<<1} Working with Linked Documents

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TM.HLPï¿½WORD1_Maintaining_the_List_of_Documents)<<1} Maintaining the List of Documents

## Note for the Word Processor Document Selection Box

TeleMagic no longer supports DDE merge. If you have existing DDE documents, see Converting DDE Documents to the Current Merge Format for instructions on converting these documents to the acceptable format.

## Note for Step 1

If you are a user upgrading from version 1.5 or earlier who has created documents using more than one word processor, the Document selection box will contain all of the previously created documents.

## Note for Step 2

Consider creating a standard letter template containing your return address, the date directive, and the contacts' address fields. You can save time by using this template whenever you are sending a letter to any of your contacts.

## Note for Step 6

If you choose the `Blank Document` template, the document will be based on a default file: DEFAULT.WRI or DEFAULT.RTF. You can leave this file blank, or you can enter default text which will appear any time a user selects the `Blank Document` template in Write or WordPad. (If you want to be able to start Write or WordPad documents from a blank page, it is recommended that you leave this file blank.) *Do not delete this file.* If you do so, you will only be able to create documents based on user-defined templates.

## Note for Step 7

This will default to the folder that is currently open in the Document selection box.

## Note for Step 10

If you get an error message that TeleMagic is unable to open the Write word processor, it is possible that Write is not located in the default path of C:\WINDOWS\WRITE.EXE. If this is the case, copy the file WRITE.EXE into the C:\WINDOWS directory. Otherwise, place Windows Write, including the new path, in your Writing preferences and only access the Word Processor option from the Write menu. (See TM-Merge Setup for instructions.)

## Additional Note for Step 10

If you have re-sized your TeleMagic window, the word processor screen will also re-size to fit your display. If your display is extremely narrow, it is possible that the buttons at the top of the screen will appear over the top of one another. Clicking on any visible portion of the button will activate that command.

## Hint for Step 11

You may edit or delete portions of the document that were included in the template without affecting the original template.

## Note for Step 13

TeleMagic for Windows prior to V2.0 used the level before the field name. Versions 2.*x* and 3.*x* allowed this format to be used as an option. This option is not available for V4. You must change your merge fields to the new format, *field name* followed by *level*, before your merge documents can be used.

## Note for Step 14

When creating the document description, you assigned the document to a level. You will not be able to go to a lower level than the one you selected. (For example, if you select Level 2, you will not be able to select Level 3 fields.) If you discover you must use fields from a lower level, see the topic Changing Word Processor Documents and Templates for instructions on adjusting the document level.

## Hint for Step 15

If you want to include a numeric field that uses decimal places, you should add the field to the document using the Expression Builder STR( ) command. In the Expression Builder, type **str(*field_name*,*field_length,#_decimal_places*)**. For example, the Documentation Database's Order Amount field is a 10 character field named contact3.amtorder that uses 2 decimal places. For this field you would enter: **str(contact3.amtorder,10,2)**.

## Note for Printing Documents Using the Windows Write/WordPad Interface

This section assumes that you have already created a Write or WordPad document and are ready to actually perform a merge.

## Note for Step 1

If the document is linked to the contact, you do not have to open the contact record.

## Note for Step 8

This list will include all queues that begin with **Print Queue**. If there is no queue named Print Queue... at the Automation Server, you will not be able to select this option. See Setting Up a Queue on the Automation Server for details.

## Notes for Step 12

If you have `Stamp Notepad on Merge` selected in Writing preferences, the `Stamp Notepad` check box will be marked by default. If you have `Create Activity When Printing` selected in Writing preferences, the `Create Activity` check box will be marked by default.

If you have selected to preview the merge document, give careful attention to the check boxes. If these check boxes are marked, TeleMagic will stamp the notepad and activity comments as soon as you select **OK** at the Write/WordPad Options dialog box. If you are merely previewing the document without intending to actually print, make sure these check boxes are unmarked or you will create an inaccurate print history.

## Note for Step 14

You may edit the document using Windows Write or WordPad word processing commands at this point. You may not include additional merge fields. Any changes made to the document will not be saved in the document; they will only appear in the printed letter.

## Note for Step 18

Giving you the option to save the changes is a Windows Write and WordPad feature which is not applicable at this point. Selecting **Yes** will not actually cause any changes to the document. To save a copy of the document with the merged information and any editing you have done, use the **Save as...** option on the **File** menu and save the file under a unique name. This file can be accessed when you enter Windows Write or WordPad external to TeleMagic.

## Note for Step 6

For a complete discussion of all of the preference available on this screen, see the Writing Preferences topic.

# Note for Creating a Merge Document or Template

When creating the document description, TeleMagic provides certain defaults. If you know you will be accepting all of the defaults, you can select to perform a Quick Add. See the Quick Add topic for details.

## Note for Step 7

This will default to the list you are currently viewing in the Document selection box.

## Note for Step 4

Instead of pressing ALT+SHIFT+F, you *could* click the **Insert Merge Field** button on the toolbar. However, in certain resolutions, Word for Windows Version 6.0 and 7.0 have a display problem when an associated data file has as many fields as the average TeleMagic database: When you press Insert Merge Field, the list is displayed off the screen. Pressing ALT+SHIFT+F avoids any problems associated with the button. See To Create a Word Insert Merge Field Macro: for information on creating a macro to automate this process.

## Hint for Step 4

To automate accessing the Insert Merge Field dialog box in Word 7.0, you can create a tool on your toolbar by following the instructions in Creating a Word Insert Merge Field Macro.

## Note for Step 4

Instead of pressing ALT+SHIFT+F, you *could* click the Insert Merge Field button on the toolbar. However, in certain resolutions, Word for Windows Version 6.0 has a display problem when an associated data file has as many fields as the average TeleMagic database: When you press Insert Merge Field, the list is displayed off the screen. Pressing ALT+SHIFT+F avoids any problems associated with the button.

## Hint for Step 4

To automate accessing the Insert Merge Field dialog box, you can create a tool on your toolbar by following the instructions in Creating a Word Insert Merge Field Macro.

## Hint for Quick Add

If you want to control what information appears by default in the quick letters, you can create a template file that will be used instead of the TeleMagic default. Simply create a file named QDEFAULT.* (where * is the file extension used by your word processor; for example, for Word for Windows you would create a file named QDEFAULT.DOC). Place the template file in your database directory if you want the template to be database specific or the global directory (where TeleMagic is installed) if you want it available in all databases.

## Note for Step 3

Documents added using Quick Add will be stored in your default working directory path established in Writing preferences. See Writing Preferences: Choosing the Location for Word Processing Files for details.

## Note for Step 4

If you select this option, a record of the print will be created as soon as you launch the word processor. If you decide not to print the document, you should delete the activity to maintain an accurate record.

## Note for Step 1

If the document is linked to the contact, you do not have to open the contact record.

## Note for Step 8

This list will include all queues that begin with **Print Queue**. If there is no queue named Print Queue... at the Automation Server, you will not be able to select this option. See Setting Up a Queue on the Automation Server for details.

## Note for Step 12

If you have selected to preview the merge document, give careful attention to the check boxes. If these check boxes are marked, TeleMagic will stamp the notepad and activity comments as soon as you select **OK** at the Print Options dialog box. If you are merely previewing the document without intending to actually print, make sure these check boxes are unmarked or you will create an inaccurate print history.

## Note for Step 14

Prior to printing the document(s), TeleMagic attaches a file containing data from the contact record or filter to which you are printing that is referenced when filling in merge fields. When you close the document, your word processor will register the fact that this file has been attached to the document and will give you the option of saving. Select **No**.

## Note for Step 3

You will not be able to change the template at this time.

## Note for Step 5

The previous document will still exist, but it will no longer be associated with this description in TeleMagic.

## Note for Step 2

If the document is linked to a contact in another database, you will receive a message informing you that the database must be opened in order to view the related contact information. If you select to view the information, there will be a pause as the database is opened. When you have finished viewing the contact information, that database will be closed and you will be returned to the database from which you started.

## Hint for Step 3

When this window is open, **Text** is added to the main menu. Options on this menu let you select the font and spacing of the text in this window.

## Note for Step 5

If the associated contact is in another database, you will be informed of this fact and given the opportunity of opening the other database. If you choose **Yes** your current database will close and you will be taken to the linked record in the other database. If you choose **No** you will return to the Word Processor Document selection box.

## Note for Step 5

The document history will be updated indicating that a print merge was performed. This will be done even if you do not actually print the document.

## Using Expressions in Merge Documents

When you are creating a merge document in WordPad, you can use expressions as well as merge fields. See the topic To Create a Document in WordPad for instructions.

## Note for Step 6

TeleMagic does not support long filenames. The name for the file can be up to 8 characters in length, and can include an extension of up to 3 additional characters for a total of eleven characters. The name and extension must be separated by a period which does not count as one of the eleven characters. Some characters cannot be used anywhere in the filename. If you attempt to use any of these characters, you will receive a message that the filename is not valid.

# Introduction to TeleMagic Internet Mail

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

TeleMagic Enterprise V4.0 now provides the user with expanded internal e-mail capability as well as fully-integrated Internet e-mail in one easy-to-use package. TeleMagic's Mail feature has been completely redesigned to work even better within your TeleMagic environment, and to work independently as a stand-alone application. As with previous versions, you will still enjoy the convenience of an automatically updated user address book, easily defined user groups, spell checking, and other powerful features.

In addition, you will now be able to send and receive Internet e-mail with TeleMagic Internet Mail, send and receive multiple attachments, and organize your incoming and outgoing mail for the most efficient and appropriate handling. TeleMagic Internet Mail is designed for use with TeleMagic Enterprise. You will now be able to link e-mail messages to your contacts and use TeleMagic's Merge feature to produce targeted mass mailings. The new address book keeps your user list up-to-date automatically and your Internet contacts organized.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1}

# Starting TeleMagic Internet Mail

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TMMAIL.HLP>thirdï¿½Tmmailx_Note_for_Starting_TeleMagic_Internet_Mail)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

TeleMagic Internet Mail can be started from within TeleMagic, or opened as a stand-alone program. When opened independently of TeleMagic, some features will not be available. For example, when opened with TeleMagic open you will be able to link messages to contacts in your database. Without TeleMagic open you will not be able to do this.

**Warning**
If TeleMagic Internet Mail is opened from TeleMagic and a copy is already running, the copy that is already open will be brought to the front. User IDs will not be compared. If a workstation is used by more than one user, they should insure that TeleMagic Internet Mail is closed before turning the workstation over to any other users, even if they have logged off of TeleMagic.

## To Start Internet Mail from TeleMagic

1. From the toolbar, click on the E-mail button ( ● ).

**or** From the **Office** menu, select **TeleMagic E-mail**.

2. If MAPI is available, and you want to use it, click **Yes** to logon to MAPI.

   The Choose Profile dialog box will open.

3. Select your User Profile from the drop down list.

**or** Modify a profile, or create a new profile. See your MAPI application’s documentation for instructions on adding and modifying MAPI profiles.

4. To change the default user or view the logon screens for your information services, click **Options**.

   The **Options** section of this dialog box will open.

5. Click **OK**.

   TeleMagic Internet Mail will open.

## To Start Internet Mail from Windows 95, 98 or NT

1. From the taskbar, select **Start**, **Run**.

   The Run dialog box will open.

2. Enter the file name with complete path in the text window.

**or** Click **Browse** and use the Browse dialog box to locate the file.

3. Click **OK**.

   The TeleMagic E-mail login screen and Mail Login dialog box will open.

4. Enter your User ID in the upper field and your password in the lower field.

5. Click **OK**.

   The Confirm dialog box will open.

6. Click **Yes** to logon to MAPI.

   The Choose Profile dialog box will open.

7. Select your User Profile from the drop down list.

**or** Modify a profile, or create a new profile. See your MAPI application's documentation for instructions on adding and modifying MAPI profiles.

8. To change the default user or view the logon screens for your information services, click **Options**.

   The **Options** section of this dialog box will open.

9. Click **OK**.

   TeleMagic Internet Mail will open.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Composing_and_Sending_a_Message)<<1} Composing and Sending a Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Read_a_Message_You_Have_Received)<<1} To Read a Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Reply_to_a_Message_You_Have_Received)<<1} To Reply to a Message You Have Received

# Composing and Sending a Message

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(tmmail.hlp>hintsï¿½Tmmailx_Note_for_Addressing_Messages)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

## To compose a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Start TeleMagic Internet Mail.

- 1. From the toolbar, click the compose a new message button. ( )

  The New Message screen will open.

- 2. Enter the recipient(s) in the `To:` field.

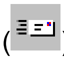
3. Enter any CC or BCC recipients in the `CC:` and `BCC:` fields, respectively.

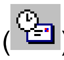
- 4. Enter the subject in the `Subject:` field.

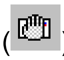
5. Compose the message in the message text area.

6. Click the Spell Check button ( ) to spell check the message.

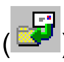
7. Select one of the following:

- Click the **Send Message Now** button () to send the message.

- Click the **Send Message Later** button () to send the message to the Outbox folder.

- Click the **Hold Message** button () to send the message to the On Hold folder.

- Click the **Queue to Automation Server** button () to send the message to the Automation Server queue.

- Click the **Save Message to Folder** button () to save the message in one of the TeleMagic Internet Mail folders.

The New Message screen will close.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1} Internet Mail Folders

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Delete_a_Message)<<1} To Delete a Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Files_to_Messages)<<1} Attaching Files to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Merge_Documents_to_Messages)<<1} Attaching Merge Documents to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tmmail.hlpï¿½TMMAIL_To_Address_a_Message_to_a_Contact)<<1} To Address a Message to a Contact

# To Read a Message You Have Received:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

## To open and read a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Start TeleMagic Internet Mail.

- 1. In the Folders section of the TeleMagic Internet Mail screen, click Inbox if it is not currently selected.

  The available messages will be listed to the right of the list of folders.

  2. Single-click the message you want to read.

  The message will appear in the section below the list of messages.

- **or** Double-click the message you want to read.

  The Message screen will open with the selected message displayed.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Reply_to_a_Message_You_Have_Received)<<1}

# Using the Address Book to Address a Message

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TMMAIL.HLP>thirdï¿½Tmmailx_Note_for_Using_the_Address_Book_to_Address_a_Message)<<1}

## To select a recipient from the Address Book:

1. Place your mouse cursor near the address line you want to fill in. When any of the fields becomes highlighted, left-click the mouse.

   The Select Recipients dialog box will open.

2. Click the tab corresponding to the Address Book you want to access.

3. Using the mouse, highlight the name(s) you want included in the recipient field.

4. Click on the button corresponding to the recipient list you want the selected name(s) added to.

   The names will be added to the list.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Composing_and_Sending_a_Message)<<1}

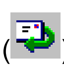
# To Reply to a Message You Have Received

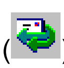
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Start TeleMagic Internet Mail.

1. Click on the message to which you want to reply.

   If you single-click, the message will be displayed in the lower-right section of the TeleMagic Internet Mail screen. If you double-click, the message will open in the Message dialog box.

2. Click on the Reply to Sender button. ()

- **or** Click on the Reply to All button. ()

   The Compose Message dialog box will open with addressing information already filled in.

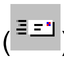
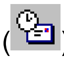
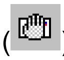
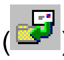
3. Enter any additional recipients in the appropriate recipient lines, separated by semicolons.

**or** Use the Address Book to add more recipients.

4. Modify the Subject line, if necessary.

5. Write your reply in the composition area.

6. Select one of the following options:

   - Send Message Now ().
   - Send Message Later ().
   - Hold Message ().
   - Queue to Automation Server ().
   - Save to Folder ()

**or** From the main menu, select **File** and one of the following:

   - Send Now
   - Send Later
   - Queue To
   - Hold Message
   - Save to Folder…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

# TeleMagic Internet Mail Folders

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

All messages in TeleMagic Internet Mail will be located in one of six system folders, accessible from the main screen. Although the user can freely relocate messages within these folders, they will normally be assigned as follows:

- **Inbox** Contains messages you have received.
- **Outbox** Contains messages to be sent later.
- **Sent Items** Contains messages which have been sent.
- **Deleted Items** Contains messages which have been deleted.
- **Undeliverable** Contains messages which could not be delivered due to difficulties such as incomplete address, ISP fault, etc.
- **On Hold** Contains messages which are not yet complete.

In addition to the system folders, the user can create custom folders.

To move a message from one file to another, click on the message and, while holding down the left mouse button, drag the message to the desired folder.

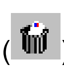
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Custom_Folders)<<1}

# To Delete a Message

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

| | |
|---|---|
| {ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp\|procddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} | Start TeleMagic Internet Mail. |

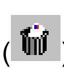
## To delete a message from the main screen:

1. Click on the folder containing the message you want to delete.
2. Select the message you want to delete by clicking anywhere on the message's description.
3. Click on the Delete Message button. ()

**or** From the **Message** menu, select **Delete**.

- The message will be moved to the Deleted Items folder.

## To delete a message from the Message dialog box:

- Click on the Delete Message button. ()

**or** From the **File** menu, select **Delete**.

- The message will be moved to the Deleted Items folder.

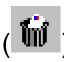
You can set TeleMagic Internet Mail to clear the Deleted Items folder automatically whenever you open or close the application. If you have not selected this option, follow this procedure to permanently delete messages.

## To permanently delete a message:

1. From the main screen, click on the **Deleted Items** folder.

   The contents of the folder will be displayed in the Messages section of the screen.

2. Select the message you want to delete.

3. Click on the Delete Message button. ()

**or** From the **Message** menu, select **Delete**.

- You will receive a message asking you to confirm the deletion.

**Warning!**
Once deleted from the Deleted Items folder, the message cannot be recovered.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

# To Print a Message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

You can print any message you have composed or received. You can even print messages you have deleted (provided you have not deleted them from the Deleted Items folder).

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Start TeleMagic Internet Mail.

## To print a message from the main screen:

1. From the main screen, select the folder which contains the message you want to print.

   The contents of the folder will be displayed in the Messages section of the main screen .

2. Click on the message you want to print.

   The message will be displayed in the Message Body section of the main screen.

3. Click the **Print the Current Message** button. ()

**or** From the **File** menu, select **Print**.

- The Print dialog box will open.

4. Select the desired printer from the drop-down list.
5. Click **OK**.

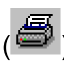
## To print a message from the Message screen:

1. From the main screen, select the folder which contains the message you want to print.

   The contents of the folder will be displayed in the Messages section of the main screen .

2. Double-click on the message you want to print.

   The message will open in the Message screen.

3. Click the **Print the Current Message** button. ()

**or** From the **File** menu, select **Print**.

- The Print dialog box will open.

4. Select the desired printer from the drop-down list.
5. Click **OK**.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Reply_to_a_Message_You_Have_Received)<
<1}

# Message Status

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

All messages in TeleMagic Internet Mail folders will have one status of a possible seven. Certain statuses will only be found in specific folders unless moved to another folder by the user. (The user can move any message into any folder regardless of status.) A message's assigned status may be any of the following:

| **Status** | **Meaning** |
|---|---|
| New | The message has been received but not yet opened. However, the message may have been read by the user in the Message Body section of the screen. |
| Opened | The message has been opened and viewed in the Message screen. The user can manually change the status of any message in any folder to opened. |
| Replied | The user has replied to the author or all recipients of the message. |
| Sent | The message has been sent. |
| Failed | The message was sent, but could not be delivered. |
| Pending | The message was written, but rather than being sent was placed On Hold. |
| Queued Local | The message was written and placed in the queue for delivery at a later time. |

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

## Attaching Files to Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

There are two broad categories of attachments which may accompany your messages: Files and Merge Documents. See the Attaching Merge Documents to Messages for more information on that topic. Any file type can be attached to your message, including text files, bitmaps, executables, and so forth. File attachments differ from Merge Document attachments in that a File attachment will not be modified for each recipient. A Merge Document will have all of the merge fields filled with the appropriate information for each recipient prior to being sent.

You can add documents in any order and combination that you like, and TeleMagic does not impose any limit on the number of attachments you can add to a document. However, you may encounter other limitations. For example, your ISP may limit the size of each e-mail message, and your recipient's e-mail application may be configured to refuse messages larger than a particular size.

**Warning!**

TeleMagic supports filenames up to eleven characters in length (8 characters plus a 3-character extension, separated by a period). If you attach a file with a long filename to an e-mail message, the filename will be truncated to the first 8 characters. Any remaining characters, including the extension, will be replaced with an ellipsis.

### To attach a file to a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Start TeleMagic Internet Mail.

- 1. Open the message in the Message dialog box.

2. Click the Add a File Attachment button. ()

- **or** From the **Message** menu, select **Add Attachment…**.

  The Open dialog box will open.

3. Select the drive containing the file to be attached from the **Look In** drop-down list.

   The list of directories on the selected drive will appear in the dialog box's main window.

4. Select the directory containing the file to be attached.

5. Select the desired file to be attached.

- The Open dialog box will close. The **Attachments** section of the Message dialog box will open with the selected attachment's file name and icon indicated.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Merge_Documents_to_Messages)<<1} Attaching Merge Documents to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Saving_Attachments_You_Have_Received)<<1} Saving Attachments You Have Received

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Removing_Attachments_from_Messages)<<1} Removing Attachments from Messages

## Attaching Merge Documents to Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

There are two broad categories of attachments which may accompany your messages: Files and Merge Documents. See the Attaching Files to Messages topic for more information on that topic. Any file type can be attached to your message, including text files, bitmaps, executables, and so forth. File attachments differ from Merge Document attachments in that a File attachment will not be modified for each recipient. A Merge Document will have all of the merge fields filled with the appropriate information for each recipient prior to being sent.

You can add documents in any order and combination that you like, and TeleMagic does not impose any limit on the number of attachments you can add to a document. However, you may encounter other limitations. For example, your ISP may limit the size of each e-mail message, and your recipient's e-mail application may be configured to refuse messages larger than a particular size.

**Warning!**

TeleMagic supports filenames up to eleven characters in length (8 characters plus a 3-character extension, separated by a period). If you attach a file with a long filename to an e-mail message, the filename will be truncated to the first 8 characters. Any remaining characters, including the extension, will be replaced with an ellipsis.

### To attach a merge document to a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Start TeleMagic Internet Mail.

- 
1. Open the message in the Message dialog box.
2. Click on the Add a Merge Document as an Attachment

button. ()

The Select Document dialog box will open.

3. Open the directory containing the merge document you want to attach by double-clicking on the associated icon.

   The documents available in the selected directory will be listed below the directory.

4. Select the merge document you want to attach.

5. Click **OK**.

   The Select Document dialog box will close. The **Attachments** section of the Message dialog box will open with the selected document's file name and icon indicated.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Files_to_Messages)<<1} Attaching Files to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Saving_Attachments_You_Have_Received)<<1} Saving Attachments You Have Received

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Removing_Attachments_from_Messages)<<1} Removing Attachments from Messages

## Removing Attachments from Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

There are two ways to remove an attachment from your message. Both methods apply to any type or category of attachment.

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1}

Start TeleMagic Internet Mail.

### To remove an attachment from a message:

1. Open the message in the Message dialog box.
2. Click on the attachment you want to remove.

   The attachment and its icon will be highlighted.
3. Press DELETE.

   The attachment will be removed from the message.

### To remove an attachment from a message (alternate method):

1. Open the message in the Message dialog box.
2. Right-click on the attachment you want to remove.

The Attachment Maintenance menu will open.


3. Click **Remove**.

The attachment will be removed from the message.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Merge_Documents_to_Messages)<<1} Attaching Merge Documents to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Files_to_Messages)<<1} Attaching Files to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Saving_Attachments_You_Have_Received)<<1} Saving Attachments You Have Received

# Saving Attachments You Have Received

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

## To save an attachment:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Open the message in the Message dialog box.
2. Right-click on the attachment you want to remove.

   The Attachment Maintenance menu will open.


3. Click **Save As…**.

   The Save Message dialog box will open.

4. Select the directory you want to save the attachment in from the **Save in** drop-down list.
5. Click **Save**.

   The attachment will be saved.

**Continue…**

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Merge_Documents_to_Messages)<<1} Attaching Merge Documents to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Files_to_Messages)<<1} Attaching Files to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Removing_Attachments_from_Messages)<<1} Removing Attachments from Messages

# Sending Mail from the Local Queue

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TMMAIL.HLP>thirdï¿½Tmmailx_Note_for_Sending_Mail_from_the_Local_Queue)<<1}

If you have created a pending e-mail message (one you have written, but not yet sent), the e-mail will have been placed in your Outbox awaiting further instructions. This is useful, for example, if you want to send a message when network or ISP traffic is lighter.

## To send mail from the local queue:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the Folders section of the main screen, select the **Outbox**.

   The contents of the Outbox will be displayed in the Messages section of the main screen.

2. Select the queued message(s) you want to send.

3. Click the Send Messages button. ( ● )

   The message(s) will be sent to the recipient(s) and moved to the Sent folder.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_On_Hold_Messages)<<1}

## On Hold Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TMMAIL.HLP>thirdï¿½Tmmailx_Note_for_On_Hold_Messages)<<1}

If you have created a pending e-mail message (one you have written, but not sent), the e-mail will have been placed in your On Hold mailbox awaiting further instructions. This is useful, for example, if you want to start drafting a message, but hold it pending further information. This is the only way to handle a message which has a blank Subject line.

### To send a pending message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the Folders section of the main screen, select the **On Hold** box.

   The contents of the On Hold box will be displayed in the Messages section of the main screen.

2. Open the pending message you want to complete and send in the Message dialog box.

3. Complete any changes or additions to the message.

4. Choose from one of the following options:

   - Click the Send Messages button ( ● ) to send the message immediately.

- Click the Send Message Later button ( • ) to change the message status to Queued Local and move it to the Outbox.
- Click the Hold Message button ( • ) to save changes and leave the message in the On Hold folder with the Pending status.
- Exit the Message dialog box to leave the message in the On Hold box without changes to content or status. (You will receive a message to confirm this option.)

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Composing_and_Sending_a_Message)<<1}

# Forwarding Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Sometimes you will receive messages which will be of interest to others. You can edit and forward these messages in much the same way as you would compose and send an original message.

## To forward messages to additional recipients:

{ewc
rhgbtn
32.dll,
BlueS
kyHel
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n,
g<pro
cedup.
bmp|
proce
ddn.B
MP<J
umpId
(TMM
AIL.H
LP>se
condï
¿½TM
MAIL_
Startin
g_Tele
Magic
_Inter
net_M
ail)<<
1}

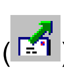
Open TeleMagic Internet Mail.

1. Select the folder containing the message you want to forward.

   The list of available messages will be displayed in the Messages section of the screen.

2. Click anywhere on the message line of the message you want to forward.

   The selected message will be highlighted.

3. Click the Forward Message button. ()

**or** From the **Message** menu, select **Forward**.

•

The Message dialog box will open.

{ewc
rhgbtn

4. Enter the names of the new recipients in the appropriate address lines.

32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Using_the_Address_Book_to_Address_a_Message)<<1}

●

5. Edit the message, if necessary.

6. Select from one of the following:

   - Click the **Send Message Now** button ( ● ) to send the message.
   - Click the **Send Message Later** button ( ● ) to send the message to the Outbox folder.
   - Click the **Hold Message** button ( ● ) to send the message to the On Hold folder.
   - Click the **Queue to Automation Server** button ( ● ) to send the message to the automation server queue.
   - Click the **Save Message to Folder** button ( ● ) to save the message in one of the TeleMagic Internet Mail folders.)

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Composing_and_Sending_a_Message)<<1}
Composing and Sending a Message

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Reply_to_a_Message_You_Have_Received)<<1} To Reply to a Message You Have Received

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|
_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Delete_a_Message)<<1} To Delete a Message

# Marking Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

You may want to mark certain messages for special handling. TeleMagic Internet Mail allows you to mark some messages to distinguish them from others. When messages are marked, the list of messages in any folder can be arranged according to the marked status.

## To mark a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Select the folder which contains the message(s) you want to mark.

2. Click anywhere on the message line of the message you want to mark.

3. From the **Message** menu, select **Mark**.

   A check mark will appear next to the item.

   Repeat steps 2 and 3 for any additional messages you want to mark.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Unmarking_Messages)<<1} Unmarking Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<______153.bmp|
______154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Arranging_Messages)<<1} Arranging Messages

## Unmarking Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

### To unmark a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Select the folder which contains the message(s) you want to unmark.
2. Click anywhere on the message line of the message you want to unmark.
3. From the **Message** menu, select **Unmark**.

   The check mark next to the item will disappear.

   Repeat steps 2 and 3 for any additional messages you want to unmark.

### Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Marking_Messages)<<1} Marking Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Arranging_Messages)<<1} Arranging Messages

## Arranging Messages

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

You can determine the order in which your messages are displayed in the Messages section of the TeleMagic Internet Mail main screen. Message order can be set according to any of the following criteria:

- Status
- Marked
- Linked
- To or From (depending on folder)
- Subject
- Date Received

To arrange the list of messages displayed according to a particular criterion, click on the corresponding button at the top of the column containing the field. The list will be arranged in natural order for the type of information in the column. (Alphabetical or sequential). To reverse the order, click on the button a second time.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

## Custom Folders

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Some users may benefit from special purpose folders in addition to the standard set of system folders provided with TeleMagic Internet Mail.

### To create a new folder:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|procddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **File** menu, select **New Folder…**.

   The Add Folder dialog box will open.

2. Enter the name for the new folder in the **Folder Name:** field.

3. Click **OK**.

   The new folder will appear in the Folders section of the main screen.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

## Removing Folders

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

If you have added folders to your TeleMagic Internet Mail system which are no longer needed, you can remove them. You cannot remove system folders.

### To remove a folder:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Click on the folder you want to remove.

   The contents of the folder will be displayed in the Messages section.

2. From the **File** menu, select **Remove Folder**.

   The folder will be removed.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

# Moving Messages to Other Folders

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

TeleMagic Internet Mail has six standard folders and the user has the option to add more folders . The standard system folders were designed to contain messages which met certain criteria, but you can freely move messages into any folder you want.

## To move a message to another folder using drag-and-drop:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Click on the folder containing the message you want to move.

   The messages contained in the selected folder will be displayed in the Message area of the main screen.

2. Position the mouse cursor anywhere on the message line.

3. Click and hold the left mouse button.

   The message line will become highlighted.

4. Drag the message line to the vicinity of the destination folder.

   The folder will become highlighted.

5. Release the mouse button.

The selected file will be moved from the original folder and placed in the target folder.

### To move a file to another folder using the menu:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Click on the folder containing the message you want to move.

   The messages contained in the selected folder will be displayed in the Message area of the main screen.

2. Click on the message line you want to relocate.

   The message will become highlighted.

3. From the **File** menu, select **Move to Folder…**.

   The Move to Folder dialog box will open.

4. Click on the destination folder.

   The selected folder will become highlighted.

5. Click **OK**.

   The message will be moved and the Move to Folder dialog box will close.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|

contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

# Copying Messages to Other Folders

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Sometimes you may want a message to be in more than one folder. For example, you may compose a message for one group of recipients that you want to send later. You would probably store this message in the Outbox until you were ready to send. Meanwhile, you may want to keep a copy of the message in the On Hold folder so you can modify it and send to another group of recipients once you have begun receiving responses to the first copy.

## To copy a message to another folder:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Click on the folder containing the message you want to copy.

   The selected folder will become highlighted.

2. Click anywhere on the message line for the message you want to copy.

   The selected message will become highlighted.

3. From the **File** menu, select **Copy to Folder…**.

   The Copy to Folder dialog box will open.

4. Click on the folder you want to receive the copy of the file.

5. Click **OK**.

   A copy of the selected file will be placed in the target folder.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Folders)<<1}

# The TeleMagic Internet Mail Main Screen

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(TMMAIL.HLP>thirdï¿½Graphics_Areas_of_the_TeleMagic_Internet_Mail_Main_Screen)<<1}

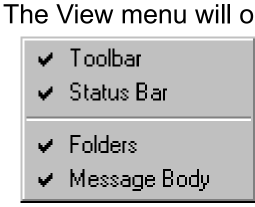
The main screen of TeleMagic Internet Mail is arranged in sections. Each of these sections serves a specific purpose. Since different users have different approaches to managing their electronic communications, some of these sections may be irrelevant to some users.

## To change the appearance of the main screen:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. Select **View** from the main menu.

   The View menu will open.

   If a particular section is currently being displayed as part of the main screen, there will be a check mark next to the corresponding item in the View menu. Clicking on a menu item will cause the check to toggle off and on.

2. Click on the menu item corresponding to the section you

want to add or remove from display.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½tmmail_Introduction_to_TeleMagic_Internet_Mail)<<1}

# The TagLine

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

A TagLine is an optional message you can compose once and insert in all of your messages. TagLines are generally used as standard closures for messages and can be as long as you feel necessary. The TagLine can either be inserted automatically in each of your messages, or manually.

## To create or edit your TagLine:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1}

Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **TagLine**.

   The Edit Your TagLine dialog box will open.

2. Compose your TagLine in the text window.

3. If you want the TagLine to appear automatically in each of your messages, mark the **Automatically insert TagLine into new messages** checkbox.

4. Click **OK**.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Inserting_a_TagLine_in_a_Message)<<1}

## Inserting a TagLine in a Message

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

If you have chosen not to automatically include your TagLine in each message, you can enter it manually from the Message window.

### To insert your TagLine in a message:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Composing_and_Sending_a_Message)<<1} Open a new message, or open an existing message for editing.

1. Place your cursor where you want the TagLine to start.
2. From the **Tools** menu, select **Insert TagLine**.

- The TagLine will be placed in the message beginning at the point where your cursor was placed in step 1.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TagLine)<<1}

# TeleMagic Internet Mail Preferences and Options

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

TeleMagic Internet Mail provides you with a wide variety of choices in how to configure your mail system. You can change the appearance of the Main Screen, compose a TagLine, and create new folders, as well as many other options. The following topics are procedures which will step you through the process of setting up Internet Mail to fit your needs:

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Custom_Folders)<<1} Adding New Folders
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TagLine)<<1} Composing a TagLine
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_General_Preferences)<<1} General Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Display_Preferences)<<1} Display Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Server_Preferences)<<1} Server Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Delivery_Preferences)<<1} Delivery Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Spelling_Preferences)<<1} Spelling Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Preferences)<<1} TeleMagic Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Automation_Server_Preferences)<<1} Automation Server Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Filter_Preferences)<<1} Filter Preferences
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Address_Preferences)<<1} Address Preferences

# General Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

The General Preferences tab provides options for you to determine what happens to deleted messages, how the Outbox is handled, whether your messages are automatically spell checked, and what is included in your replies.

## To access General Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

- From the **Tools** menu, select **Options…**.

  The Preferences dialog box will open.

  The following options are available:

  - **Send deleted mail to Deleted Items folder**

    Marking this checkbox will result in messages being moved to the Deleted Items folder upon deletion. If this checkbox is marked, the Empty Deleted Items radio buttons will become available.

  - **Empty Deleted Items**

    Select the radio button to empty your Deleted

Items folder:

- at start up
- on exit
- never, I will delete them manually

- **Warn me before permanently deleting mail**

  Mark this checkbox to receive a message when you are about to delete a message with no potential for recovery.

**Warning!**
If you have selected to empty deleted items on start up or exit, there will be no warning before mail is permanently deleted.

- **Include original message in reply**

  Mark this checkbox to automatically append the message you are answering to your reply. Each line of the original message will be prefaced with ‘>’.

- **Include yourself when replying to all**

  Mark this checkbox if you want to receive a copy of your reply when you respond to a message using the Reply to All option.

- **Send mail as Rich Text by default**

  Mark this checkbox if you normally want your messages sent with all text formatting. If your mail is not sent as Rich Text, the message received will be in default font and formatting. Some mail readers do not recognize Rich Text Formatting. If a message in Rich Text Format is read with one of these applications, it will contain spurious character strings which make reading difficult.

- **Store mail encrypted**

  Mark this checkbox to store messages in a format which cannot be read without TeleMagic.

- **Attachment Directory**

  Click this button to open the Select Directory dialog box and browse for the directory where attachments to incoming mail should be stored. You can also enter the path directly in the field to the right of the button.

- **Mailbox Name**

  Enter the name of the mailbox in this field. The name will appear in the title bar of the main screen.

- **Password**

  Enter a password in this field to establish a password for TeleMagic Internet Mail that differs from your TeleMagic password. If you have a password here, you will need to enter it even when launching TeleMagic Internet Mail from within TeleMagic.

- **Make TeleMagic Internet Mail my default mail client**

  Mark this checkbox to make TeleMagic Internet Mail the default mail client. Your default mail client will be launched whenever an application calls for a mail editor. For example, if you are browsing a web site and select a Send Mail hotspot, your default mail client is launched. In TeleMagic you can establish e-mail fields. When you click the icon for one of these fields, your default mail client will be launched.

When satisfied with your General Preferences, click **OK** to accept the preferences and close the Preferences dialog box.

**or**

Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Optio
ns)<<1}

# Display Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP| NOTEDN01.BMP<JumpId(TMMAIL.HLP>thirdï¿½Graphics_Areas_of_the_TeleMagic_Internet_Mail_Main_Screen)<<1}

Display preferences allow you to determine the appearance of your Internet Mail main screen, and the font that will be used in your messages.

## To access Display Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp| proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options…**.

   The Preferences dialog box will open.

2. Click on the **Display** tab.

   The Display page will be displayed.

   The following options are available:

   - **Show Toolbar**

     The Toolbar contains the graphical buttons. This preference is marked by default. If you do not want the toolbar displayed in your main screen, unmark this checkbox.

   - **Show Status Bar**

The Status Bar, located at the bottom of the main screen, indicates the currently selected folder and how many messages it contains. Unmark this checkbox if you do not want to have this information displayed on your main screen.

- **Show Folders**

  The Folders section, on the left side of the main screen, displays all of your system and custom folders. Unmark this checkbox if you do not want to view the folders.

- **Show Message Body**

  The Message Body section contains the text of the message currently highlighted in the Message section. Unmark this checkbox if you do not want message text to be displayed.

You also have the option of changing the font used to display your messages.

## To change the font:

1. Click on the **Font** button.

   The Font dialog box will open.

   You can set the following options:

   - **Font**
   - **Font Style**

     Regular

     Bold

     Italic

     Bold Italic

   - **Size**
   - **Effects**

     Strikeout

     Underline

     Color

   - **Script**

A sample of the chosen font and options will be displayed in the **Sample** window.

## To Customize the Display Configuration:

- **Use default display configuration**

Mark this checkbox to retain the defaults for how items are displayed on the screen. When this is not marked, you will be able to specify how items are displayed based on status.

Each status is listed on the left side of this section of the page. To the right of each, you can select the color and font style to be applied to each status. These selections affect the messages entry in the `From, Subject`, and `Date Received` columns when viewing the Inbox or Deleted Items folders, the `To, From`, and `Subject` columns when viewing the Deleted Items folder, and the `To, Subject`, and `Last Modified` column when viewing any other folder. As you change the settings, the name of the status will be displayed with the selected effects as an example. The following properties can be defined for each status:

| | |
|---|---|
| **Color** | Select the font color from the drop-down list for each status. |
| **Bold** | Mark this checkbox for each status that should appear in boldface. |
| **Italic** | Mark this checkbox for each status that should appear in italics. |
| **Underline** | Mark this checkbox for each status that should appear underlined. |
| **Strikethrough** | Mark this checkbox for each status that should use the strikethrough style. |

When satisfied with your Display Preferences, click **OK** to accept the preferences and close the Preferences dialog box.

**or**

Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Optio
ns)<<1}

# Server Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Server Preferences allow you to add multiple accounts from which to send and receive e-mail, and configure MAPI options .

## To access Server Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|procddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options…**.

   The Preferences dialog box will open.

2. Click on the **Servers** tab.

   The Servers Preferences page will be displayed.

## To add a new account:

1. Click **New**.

   The Internet Account Wizard will open.

2. Enter a description for this account in the `Description:` field.

3. If you would like to make this your default account, mark

the `Make this my default account` checkbox.

4. Click **Next**.

5. In the `I am known as:` field, enter your name. This is the name that a recipient will see in the `From` field when you send e-mail.

6. Enter your e-mail address in the `E-mail Address:` field.

7. Enter the outgoing mail server in the `SMTP:` field.

**Warning!**

Do not change the value in the `SMTP Port:` field unless specifically instructed to do so by your system administrator.

8. Click **Next**.

9. Enter the incoming mail server in the `POP3 Server:` field.

10. Enter the user name for the mail server in the `User Name:` field.

11. Enter the password used with the mail server in the `Password:` field.

**Warning!**

Do not change the value in the `POP3 Port:` field unless specifically instructed to do so by your system administrator.

12. Mark `always retrieve mail from this account` to

13. Mark `Delete messages from server` to remove messages from the mail server after downloading.

14. Click **Next**.

15. Select `Use Dial-up Networking/RAS` to use an established Dial-up connection.

**or** Select `Connect through my Local Area Network (LAN)`, then skip to step 19.

16. If you selected `Use Dial-up Networking/RAS`, select the connection you want to use from the drop-down list.

17. Enter the user name associated with this Dial-up connection in the `Username:` field.

18. Enter the password associated with the user name entered in step 17 in the `Password:` field.

19. Click **Finish**.

The following MAPI options are available:

- **Logon to MAPI**

  Select the radio button that indicates your preference for logging on to MAPI. You can be prompted before logging on, always log on, or never log on.

- **Send Internet Mail through MAPI server**

  Mark this checkbox to use the MAPI server to send your Internet mail.

- **Mailbox Name**

  Enter your MAPI mailbox name in this field. If this is blank, you will be prompted for a mailbox when logging on to MAPI.

- **Password**

  Enter your MAPI password in this field. If this is blank, you will be prompted for a password when logging on to MAPI.

When satisfied with your Server Preferences, click **OK** to accept the preferences and close the Preferences dialog box.
**or**
Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Options)<<1}

# Delivery Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Delivery Preferences allow you to determine how often your application queries your ISP for Internet e-mail and how you are notified of new mail.

## To access Delivery Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options…**.

   The Preferences dialog box will open.

2. Click on the **Delivery** tab.

   The Delivery Preferences page will open.

   The following options are available:

   - **Check for message every**

     Mark this checkbox to automatically query for mail. TeleMagic Internet Mail will dial up your ISP if you are not online when the specified period has elapsed.

   - **minutes**

     Enter the number of minutes you want to elapse before automatically checking for mail. If `Check for message every` is not marked, this entry is ignored.

- **Don't download messages greater than**

  Mark this checkbox to restrict the size of messages that you want to receive. If you mark this checkbox, enter the maximum size, in kilobytes, that you want to receive in the **K** field. You can either enter the amount directly, or you can use the spinner arrows..

When new mail is received, notify me:

- **Never**

  You will not be notified of new mail.

- **Visually**

  When new mail is received, a message will appear informing you.

- **Audibly**

  When this radio button is selected, the text field will become available. Enter the path and file name of a WAV file in the field, or click the ellipsis (…) button to locate a file. When new mail is received, the selected WAV file will be played.

- **Visually and Audibly**

  When this radio button is selected, the text field will become available. Enter the path and file name of a WAV file in the field, or click the ellipsis (…) button to locate a file. When new mail is received, a message will appear and the selected WAV file will be played.

When satisfied with your Delivery Preferences, click **OK** to accept the preferences and close the Preferences dialog box.

**or**

Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Options)<<1}

# Spelling Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

## To access Spelling Preferences:

| | |
|---|---|
| {ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp\|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} | Open TeleMagic Internet Mail. |

1. From the **Tools** menu, select **Options….**

   The Preferences dialog box will open.

2. Click on the **Spelling** tab.

   The Spelling page will be displayed.

   The following options are available:

   - **Automatically spell check messages when sending or queuing**

     Mark this checkbox to perform a spell check on each message before sending it.

   - **Ignore Uppercase words**

     Mark this checkbox to ignore any words that are entirely uppercase when performing the spell check.

- **Ignore words containing numbers**

  Mark this checkbox to ignore any words which contain at least one number when performing the spell check.

- **Ignore HTML tags**

  Mark this checkbox to ignore any words in HTML tag format when performing the spell check.

- **Ignore URLs and e-mail addresses**

  Mark this checkbox to ignore any words in URL or e-mail address format when performing the spell check.

- **Check for repeated words**

  Mark this checkbox to alert on the second consecutive occurrence of the same word when performing the spell check.

- **Auto-Suggest**

  Mark this checkbox to have the spell checker offer a list of suggested spellings for misspelled words.

- **Recheck replaced words**

  When the spell checker finds a word that it does not recognize, it gives you the opportunity to enter another spelling. Mark this checkbox to perform a spell check on words entered in this way. Words replaced from the suggested list are not rechecked.

When satisfied with your Spelling Preferences, click **OK** to accept the preferences and close the Preferences dialog box.

**or**

Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

# TeleMagic Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

### To access TeleMagic Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options….**

   The Preferences dialog box will open.

2. Click on the **TeleMagic** tab.

   The TeleMagic Page will be displayed.

   The following options are available:

   - **Log on to TeleMagic**

     Select the radio button indicating your preference for logging on to TeleMagic. You can choose to be prompted before logging on, always log on, or never log on. You must be logged on to TeleMagic in order to use certain features, like linking and displaying linked information. You can be logged on to TeleMagic without it being open. If you are logged on with TeleMagic closed, you will be able to link messages to contacts using the Advanced

Search feature and display contact information, but you will not be able to Link to Current Contact. If you choose `Never`, the remaining options on this page will have no effect.

- **Enter the location of your TeleMagic installation**

  Enter the path to TeleMagic. You can enter the path directly, or you can click the **Modify** button and browse for the Installation.

- **UserID**

  Enter your TeleMagic user ID in this field.

- **Password**

  Enter your TeleMagic password in this field.

- **When using Goto based on the e-mail address, look for the contact in**

  Select the radio button indicating how you want to search for contacts when using Goto. You can choose to check only the current database, all databases, or check the current database and be prompted before checking other databases.

- **Automatically link incoming mail**

  Mark this checkbox to have TeleMagic Internet Mail search your databases for contacts with e-mail addresses matching the sender's address on incoming mail and linking the message to that contact. You must have the E-mail key field established in each database with which you want to use this feature.

- **Set Search Order**

  This button becomes available when you have chosen to automatically link incoming mail. Click this button to open the Select Database dialog box and select the databases to be searched, and in what order.

- **Stamp Notepad**

  Mark this checkbox to mark the notepad of the linked contact and record that a message was sent.

- **Create Activity**

  Mark this checkbox to create an activity based when a linked message is sent.

When satisfied with your TeleMagic Preferences, click **OK** to accept the preferences and close the Preferences dialog box.

**or**

Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Options)<<1}

# Automation Server Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Automation Server Preferences allow you to determine how messages are handled when they are queued to the Automation Server and what happens when you send a linked message.

## To access Automation Server Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|procddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options…**.

   The Preferences dialog box will open.

2. Click on the **Automation Server** tab.

   The Automation Server Preferences page will open.

## To add a new Automation Server account:

1. Click **New**.

   The Automation Server Mail Account Setup dialog box will open.

2. Enter a description for this account in the `Description:` field.

3. Enter the POP3 (receive mail) server name in the `Host Name:` field.

4. Enter the user name recognized by the mail service (ISP) to access this account in the `User Name:` field.

5. Enter the password used to access this account on the mail service in the `Password:` field.

6. The `Port:` value is preset to 110. Do not change this setting unless instructed to do so by your ISP.

7. Mark the `Delete messages from the server` checkbox to delete messages on the mail service after they have been retrieved. If you do not mark this checkbox, you will continue to retrieve messages that you have deleted locally until they are deleted from the server.

   Click **OK**.

The following options are available:

- **Send e-mail notification of failure**

  Mark this checkbox to have the Automation Server send you an e-mail message whenever one of your messages that was sent via the Automation Server fails.

- **Fail on Invalid Merge Field**

  Mark this checkbox to fail any message if the attached merge document contains an invalid field.

- **Stamp Notepad**

  Mark this checkbox to stamp the notepad of linked contacts when a message to them is sent via the Automation Server.

- **Create Activity**

  Mark this checkbox to create an activity based on the message when sent via the Automation Server.

When satisfied with your Automation Server preferences, click **OK** to accept the preferences and close the Preferences dialog box.
**or**
Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Optio

ns)<<1}

# Filter Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

Mail filters are used to automatically direct incoming mail to folders other than the Inbox, forward them to other recipients, or delete them based on the presence of specified text in selected fields of the message being filtered.

## To access Filter Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options…**.

   The Preferences dialog box will open.

2. Click on the **Filters** tab.

   The Filters Preferences page will open.

## To add a new filter:

1. Click **New Filter**.

   The Mail Filter Properties dialog box will open.

2. Enter a description for this filter in the `Description:` field.

3. Enter the text that will cause the action of the filter to be executed in the `When receiving mail containing text:` field.

4. Mark the `Case Sensitive` checkbox to require that the case of the text be considered when matching the test criterion to the contents of the message.

5. Mark the fields where the test criterion can be found to cause the action of the filter to be executed. You can select any combination of the `To, CC, From, Subject,` and `Message Body` fields.

6. Select the radio button that describes the action to be taken when the test criterion is met. You can choose to move the message to a particular folder, delete the message, redirect the message to another recipient, or forward the message to another recipient. If you choose to redirect or forward the message to another recipient, enter their e-mail address in the text field. If you choose to redirect the message, the message will not appear in any of your folders.

7. The `Select Folder` button becomes available if you choose to move the message to a folder. Click this button to open the Select Folder dialog box and choose the folder to send the message to.

8. Click **OK**.

When satisfied with your Filter Preferences, click **OK** to accept the preferences and close the Preferences dialog box.
**or**
Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Optio
ns)<<1}

# Address Preferences

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

## To access Address Preferences:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **Options….**

   The Preferences dialog box will open.

2. Click on the **Addresses** tab.

   The Addresses Preferences page will be displayed.

   Select the radio button indicating your preference as to how names are displayed. This setting affects the Address Book and, indirectly, the address lines on new messages. This setting can be overridden on individual cards. Changing this setting does not affect cards that are already in the Address Book.

When satisfied with your Address Preferences, click **OK** to accept the preferences and close the Preferences dialog box.

**or**

Click **Apply** to accept the changes, keep the Preferences dialog box open, and continue with changes in other areas.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_TeleMagic_Internet_Mail_Preferences_and_Optio
ns)<<1}

# The Internet Address Book

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

TeleMagic Internet Mail provides you with the ability to use any of several address books. While the TeleMagic User Address Book is maintained automatically by TeleMagic, and the MAPI Address Book is interfaced from your MAPI application, the Internet Address Book provides you with complete flexibility as to its content. As with the other Address Books, you can easily address your messages by simply selecting the Internet Address Book and clicking on the name of the intended recipient or recipients. In addition, you can define groups of recipients to whom you are likely to send mail on a regular basis. These groups are selected in the same manner as individual recipients.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Maintaining_Your_Internet_Address_Book)<<1} Maintaining Your Internet Address Book

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Create_a_Group_in_the_Internet_Address_Book)<<1} To Create a Group in the Internet Address Book

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_To_Delete_an_Individual_or_Group_from_the_Address_Book)<<1} To Delete an Individual or Group from the Address Book

# Using This Help System

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<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, all procedures have amplifying information attached to a set of graphical controls as well as 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(TMMAIL.HLP>thirdï¿½Tmmailx_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(TMMAIL.HLP>thirdï¿½Tmmailx_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:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½Tmmailx_Continue_Topic_for_Using_This_Help_System)<<1}

Click on this button to proceed to the one, preselected, follow-on topic.

**or**

Choose one of the following topics:

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TMMAIL.HLPï¿½Tmmailx_Follow_on_Topic_1)<<1} Follow-on Topic #1

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.BMP|_____154.BMP<JumpId(TMMAIL.HLPï¿½Tmmailx_Follow_on_Topic_2)<<1} Follow-on Topic # 2

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

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TM.hlpï¿½TIPTRICK_Printing_Help_Topics)<<1}

# Maintaining Your Internet Address Book

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

The Internet Address Book provides you with the ability to maintain a private set of e-mail addresses. Use this feature to help stay in touch with individuals who are not included in your TeleMagic or MAPI address books.

## To make an entry in the Internet Address Book:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1}

Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **TeleMagic Address Book…**.

   The Address Book will open.

2. From the **File** menu, select **New**, **Card…**.

   The Card Properties dialog box will open to the Personal tab.

3. Enter the following information in the fields provided:

   - First, Middle, and Last name.

     The contact's full name.

   - Display as

     The name you want displayed in the

Name column in the Address Book and what you want displayed in the address field of messages.

- E-mail address

    The contact’s e-mail address.

All remaining steps are optional. You can click **OK** at any time to save whatever you have entered so far.

4. Click on the **Home** tab.

    The Home information entry screen will be displayed.

5. Enter the following information in the fields provided:

    - Address

        The contact’s street address.

    - City
    - State
    - Zip

        ZIP or Postal code

    - Country
    - Phone
    - Fax
    - Pager

6. Click on the **Business** tab.

    The Business information entry screen will be displayed.

7. Enter the following information in the fields provided:

    - Name

        The name of the contact’s business or organization.

    - Address

        The street address of the contact'

    - City
    - State
    - Zip

        ZIP or Postal code

    - Country

- Phone
- Fax
- Pager

8. Click the **Notes** tab.

   The Notes screen will be displayed.

9. Enter any other information you want to keep available concerning this contact.

10. Click **OK**.

    The Card Properties dialog box will close. You will be returned to the Address Book .

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_The_Internet_Address_Book)<<1}

# To Create a Group in the Internet Address Book

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

By creating groups in your Address Book you will save time by eliminating the need to select individual recipients. You can group individuals according to any criterion you like. You may, for example, create a group for each of the firms or organizations you regularly deal with.

An individual can be included in more than one group. Therefore, in addition to being in a group for their company, an individual could also be in a group of all suppliers, all customers in Europe, or all purchasing agents.

## To create a group:

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

- 1. From the **Tools** menu, select **TeleMagic Address Book…**.

   The Address Book will open.

2. From the **File** menu, select **New**, **Group…**.

   The Group Properties dialog box will open.

3. Enter the name of the group in the **Group Name** field.

- 4. Click on the user you want to add to the group.

   The selected user will become highlighted.

5. Click **Add**.

   The selected individual will be removed from the list of **Available** recipients and added to the **Members** list.

6. Repeat steps 4 and 5 until you are satisfied.

7. Click **OK**.

   Double-click on **Personal Addresses**. The new group will appear under the Personal Addresses icon.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_The_Internet_Address_Book)<<1}

# To Delete an Individual or Group from the Address Book

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<procedup.bmp|proceddn.BMP<JumpId(TMMAIL.HLP>secondï¿½TMMAIL_Starting_TeleMagic_Internet_Mail)<<1} Open TeleMagic Internet Mail.

1. From the **Tools** menu, select **TeleMagic Address Book….**

   The Address Book will open.

2. Click on the individual or group you want to delete.

   The selected entry will be highlighted.

3. From the **File** menu, select **Delete**.

   You will receive a message confirming the deletion.

4. Click **Yes** to delete the item.

   The item will be removed from the list.

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_The_Internet_Address_Book)<<1}

# Opening TeleMagic Internet Mail for the First Time

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

The first time you open TeleMagic Internet Mail, you will need to provide some information for the initial configuration. You can edit any of this information later, as required. You can open TeleMagic for the first time while in TeleMagic, or independently of TeleMagic. The user must exist in TeleMagic before the mail account can be established.

## To Open Internet Mail for the First Time (External to TeleMagic):

1. From the taskbar, select **Start**, **Run**.

   The Run dialog box will open.

2. Enter the file name with complete path in the text window.

   **or** Click **Browse** and use the Browse dialog box to locate the file.

3. Click **OK**.

   The TeleMagic E-mail login screen and Mail Login dialog box will open.

4. Enter your user ID in the **Mailbox:** field.

5. Enter your TeleMagic password in the **Password:** field.

6. Click **OK**.

   A message will open asking if you would like to create a new mailbox.

7. Click **Yes**.

   The Mailbox Setup Wizard will launch.

8. A location to store your mail will be offered. You can change this by typing a new path in the field, or you can click **Modify** and browse for the location. If you enter a directory that does not exist, you will be prompted to confirm that you want to create a new directory.

9. Click **Next**.

10. Enter the name you want to appear in the From field of your messages in the **I am known as** field.

11. Enter the password you want to use to access TeleMagic Internet Mail in the **Password** field. Re-enter the password in the **Verify Password** field. These two entries must match exactly to proceed.

12. Click **Next**.

13. Select the radio button indicating how you would like to log on to TeleMagic. You can choose to log on to TeleMagic whenever you open Internet Mail, to be

prompted to log on, or not to log on.

14. The location of your TeleMagic installation will be offered in the **Enter the location of your TeleMagic installation:** field. Correct this if necessary by entering the correct path, or by clicking **Modify** and browsing for the installation.

15. Enter your TeleMagic User ID in the **UserID:** field.

16. Enter your TeleMagic Password in the **Password:** field.

17. Click **Finish**.

    TeleMagic Internet Mail will open.

Initial setup is complete. You will be able to exchange mail with other TeleMagic users, but you must establish at least one server to be able to exchange mail through the Internet. To set up a server, see Server Preferences.

## To Open Internet Mail for the First Time (From TeleMagic):

See the topic Starting TeleMagic Internet Mail. You will be able to exchange mail with other TeleMagic users, but you must establish at least one server to be able to exchange mail through the Internet. To set up a server, see Server Preferences.

# To Address a Message to a Contact

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<NOTEUP01.BMP|NOTEDN01.BMP<JumpId(tmmail.hlp>hintsï¿½Tmmailx_Note_for_Addressing_Messages)<<1} {ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

*Preliminary* To use the E-mail field fully, you must first add a field to your database to hold e-mail addresses. Contacts must have a valid e-mail address in this field to be addressed using any of these procedures. Then you must identify that field as your E-mail Key Field. To open a new message with the current contact as the addressee, you must have an E-mail field in your database with the contact's e-mail address and you must have a default mail client established in Windows. You can establish TeleMagic Internet Mail as your default mail client , or you can establish another application. To establish another application, refer to that applications documentation.

## To Address a Message to the Current Contact:

- Click on the icon next to the E-mail field. ●

  Your default mail client will open with a new message started. The message will be addressed to the selected contact.

## To Address a Message Using Contact Search:

1. Open a new message as described in Composing and Sending a Message.
2. Click on the `To:` button to the left of the address field.

   The Select Recipients dialog box will open.
3. Click the **Contacts** tab.

   The Contacts page will open.
4. Click **To:**, **CC:**, or **BCC:**.

   The Advanced Contact Search dialog box will open.
5. Enter the search criterion in the `Search for:` field.
6. Select the database to be searched from the `Database:` drop-down list.
7. Select the level to be searched from the Level: drop-down list.
8. Select the index to be used for the search from the Index: drop-down list. The first field of the selected index's expression must contain the search criterion entered in step 5.

   **example:**

   If you want to search the Documentation database for a contact's first name, you would enter the contact's first name in step 5, select `Documentation Database` in step 6, select `Level` in step 7, and select `Contact First Name` in step 8.

9. Click **Search**.

   The Advanced Contact Search dialog box will close. The first contact meeting the search criterion will be entered in the field associated with the button you clicked in step 4. If no match is found, a message will appear. You will have the option of searching the database using Browse.

   Repeat steps 4 through 9 to add more recipients to the message.

10. When all recipients have been added, click **OK**.

    The Select Recipients dialog box will close. The message will be addressed to the selected recipients.

## To Address a Message Using Browse:

1. Open a new message as described in Composing and Sending a Message.

2. Click on the `To:` button to the left of the address field.

   The Select Recipients dialog box will open.

3. Click the **Contacts** tab.

   The Contacts page will open.

4. Click **To:**, **CC:**, or **BCC:**.

   The Advanced Contact Search dialog box will open.

5. Select the database to be searched from the `Database:` drop-down list.

6. Select the level to be searched from the Level: drop-down list.

7. Select an index from the Index: drop-down list. The selected index will determine the order in which the contacts are displayed.

8. Click **Browse**.

   The Select a Contact browse window will open.

9. Scroll through the list until you have found the desired contact.

10. Highlight the contact by highlighting one of the fields in the contact record.

11. Click **Select**.

    The Select a Contact browse window and the Advanced Contact Search dialog box will close. The highlighted contact will be added to the field indicated in step 4.

Repeat steps 4 through 11 to add more contacts.

12. When all addressees have been added, Click **OK**.

    The Select Recipients dialog box will close. The message will be addressed to the selected contacts.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Files_to_Messages)<<1} Attaching Files to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Attaching_Merge_Documents_to_Messages)<<1} Attaching Merge Documents to Messages

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tmmail.hlpï¿½TMMAIL_Composing_and_Sending_a_Message)<<1} Composing and Sending a Message

# To Address a Message to Another User

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Mailï¿½ ï¿½ ï¿½ )<<1}

1. Open a new message as described in Composing and Sending a Message.

2. Enter the user's ID in the To: field. The ID must be enclosed in angle brackets (<>). Add additional recipients as required separating each with a semicolon (;). Proceed to step 7.

**or** Click on the To: button to the left of the address field.

The Select Recipients dialog box will open.

3. Click **TeleMagic Users**.

   All users in the current installation will be listed in the field on the left.

4. Highlight the name of the user who is to receive the message and click **To:**, **CC:**, or **BCC:**. All messages must have at least one entry in the **To:** field to be sent.

   The User name will appear in the selected field.

5. Repeat step 4 as necessary to address the message to all recipients.

6. Click **OK**.

   The Select Recipients dialog box will close

7. Compose and send the message as described in Composing and Sending a Message.

## Continue…

{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TMMAIL_Attaching_Files_to_Messages)<<1} Attaching Files to Messages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½TMMAIL_Attaching_Merge_Documents_to_Messages)<<1} Attaching Merge Documents to Messages
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½TMMAIL_Composing_and_Sending_a_Message)<<1} Composing and Sending a Message
{ewl rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(tm.hlpï¿½TMMAIL_To_Address_a_Message_to_a_Contact)<<1} To Address a Message to a Contact

## Step 2 Note

If you choose not to logon using MAPI, click No and Internet Mail will open. The procedure ends at this point.

In order to send mail via the Internet you will need to either open TeleMagic Internet Mail using MAPI, or you will need to set up your Internet mail account in **Tools, Options…**.

You must have a MAPI application established to successfully logon to TeleMagic Internet Mail using MAPI.

## Step 2 Note

If installed by default on your C drive, the command will be C:\TM4\PROGRAMS\TMMAIL.

## Step 4 Note

Use your TeleMagic Userid and password.  Only established TeleMagic users in the installation associated with the current installation of TeleMagic Internet Mail will be able to login to the system.

## Step 2 Notes

You can enter the name of the user as it appears in your address book, the full Internet address, or open your address book and select the recipient.

You must have at least one recipient in the `To:` field to send the message. If you do not include a recipient in the To: line, the Send Message Now button will be unavailable.

## Step 4 Note

You must enter a subject to be able to send the message. A message may be placed in the On Hold folder without a subject.

## Step 1 Note

You can also open the New Message screen by selecting `Message, New Message` from the main toolbar, or by pressing CTRL+N on the keyboard.

## Step 1 Note

If you have moved the message, select the appropriate mailbox.

## Step 2 Note

After opening the message to the Message screen, the status of the message will change to Opened.

## Step 2 Note

There are three Address Books available: TeleMagic, Internet, and MAPI. In addition to the address books, you can select the **Contacts** and **Contacts with Merge Option** tabs. This procedure is only applicable when addressing messages to recipients in the Internet, TeleMagic Users, and MAPI address books.

- The **Internet** book contains Email addresses for individuals and other biographical information which you have entered. You may assign individuals in this list to groups.
- The **TeleMagic Users** book includes all TeleMagic users in your system. These users, and any groups they may be in, are established from within TeleMagic.
- The **MAPI** book is your MAPI address book and contains addresses established in other MAPI-compatible applications.
- The **Contacts** tab allows you to select one of the filters from your database. The message will be addressed to all contacts in the selected filter. Any contacts in the filter who do not have email information will be ignored. You must have the E-mail Key Field defined in the database you are using. When you select recipients in this way, the To: field will indicate “TeleMagic Contact” or “TeleMagic Filter”.
- The **Contacts with Merge Option** tab provides you with the ability to send merge documents as attachments to contacts via the Automation Server.

## Step 3 Hint

To select additional recipients, hold down the CTRL key and click on each additional name to be added.
**or**
To add a range of names to the list, select the name at the top (or bottom) of the list, hold down the CTRL+SHIFT keys and click on the name at the bottom (or top) of the list. All intervening names will be selected along with the second name.
**or**
Click and hold the left mouse button and drag through all recipients you wish to select.

## Step 4 Note

Any recipient to a message will be in one of three categories: To:, CC:, and BCC.

- To: - There must be at least one recipient on the To: line for the message to be sent.
- CC: - Recipients in the CC: category are essentially the same as those in the To: list. Messages are generally sent to recipients as CC: (rather than To:) to indicate, for example, that there is no response to the message expected of them but that the message may be of interest to them nonetheless.
- BCC: -.Recipients on the BCC list will not be known to any other recipients, including other BCC recipients. Reply to All has the same effect as Reply to Sender in the case of BCC recipients.

## Step 2 Note

You may also select **Message, Reply to Sender** or **Message, Reply to All** rather than clicking on the buttons.

If Reply to Sender is selected, the response will be sent to the originator only. If Reply to All is selected, the response will be sent to the sender and all CC: recipients. In neither case will BCC: recipients receive a response.

## Step 6 Note

**Queue To** will send the message to the Automation Server.

**Save to Folder…** opens a dialog box from which you can select any of the TeleMagic Internet Mail folders as a destination for the message.

## Step 4 Note

Select the desired profile from the drop-down list and mark the **Set as default profile** checkbox to change your default profile.   The chosen profile will be automatically selected when you next login to TeleMagic Internet Mail.

Mark **Show logon screens for all information services** to see the logon screens for the information services you have selected in your MAPI application.   The logon screens will be displayed after you click **Ok** and this dialog box closes.   This option is not persistent.   The next time you open TeleMagic Internet Mail, you will need to select **Options** and mark this checkbox again to view the logon screens.

## Note for Starting TeleMagic Internet Mail

Although TeleMagic Internet Mail may be opened and run as an independent program, it relies on your TeleMagic user list. In order for the program to be opened, it must be located in the TeleMagic global directory and the user must be an established TeleMagic user—even if TeleMagic Internet Mail is being opened with TeleMagic shut down.

## Step 3 Note

Click **Yes** to delete the message, or click **No** to quit the process without deleting.

There is a preference which allows you to disable sending deleted messages to the Deleted Items folder. If you select this preference deleted items will be permanently deleted regardless of where they are deleted from.

## Step 3 Note

A number of options are available from this dialog box.   See the documentation for your operating system and printer for more information.

## Step 1 Note

To open the message in the Message dialog box:

- Select the folder which contains the message you wish to open.
- Double-click anywhere on the message line.

**or**

- From the menu, select **Message, Open…**.

The selected message will open in the Message dialog box.

## Step 2 Hint

If you already have an attachment in the **Attachment** section of the Message dialog box, you can open the Open dialog box by right-clicking the existing attachment and choosing **Add** from the menu that will become available.

The Open dialog box will open regardless of whether the attachment you right-click is a file or a merge document.

## Step 4 Hint

To close the **Attachments** section, select **View** from the menu and uncheck **Attachments**. If this selection is not available, there are no attachments associated with this message.

## Step 3 Note

This action will not delete the attached file.

## Step 4 Note

You also have the option of changing the name of the attachment. To do so, enter the new file name and extension in the **File name:** field.

## Step 2 Note

To select additional recipients, hold down the CTRL key and click on each additional name to be added.

**or**

To add a range of names to the list, select the name at either the top (or bottom) of the list, hold down the CTRL+SHIFT keys and click on the name at the bottom (or top) of the list. All intervening names will be selected along with the second name.

**or**

Click and hold the left mouse button and drag through all message lines you wish to select.

## Step 2 Note

To open the message in the Message dialog box:

- Select the folder which contains the message you wish to open.
- Double-click anywhere on the message line.

**or**

- From the menu, select **Message, Open…**.

The selected message will open in the Message dialog box.

## Step 3 Note

It is possible to place any message on hold—even one which cannot be sent. Prior to sending a pending message, verify that there is a recipient in the To: line and a subject in the Subject: line.

## Note for On Hold Messages

This procedure assumes you have already composed a message and placed it in the On Hold folder. See Composing and Sending a Message for instructions on composing messages.

## Note for Sending Mail from the Local Queue

This message assumes you have already composed a message and placed it in the Outbox. See Composing and Sending a Message for instructions on composing messages.

## Note for Using the Address Book to Address a Message

This procedure assumes you are in the process of composing a message and have the Message dialog box. See Composing and Sending a Message.

## Step 4 Note

As is the case with any message, forwarded messages must have at least one recipient in the To: line and an entry in the Subject: line.

## Step 3 Note

The original subject line will be prefaced with FW:.   You can change this if you wish, but there must be an entry on the subject line for the message to be successfully sent.

## Step 3 Note

There is a preference which allows you to disable sending deleted messages to the Deleted Items folder. If you select this preference deleted items will be permanently deleted regardless of where they are deleted from.

## Step 3 Hint

To select multiple messages, hold down the CTRL key and click on each additional message line to be added.
**or**
To add a range of messages to be marked or unmarked, select the message at the top (or bottom) of the list, hold down the SHIFT key and click on the message at the bottom (or top) of the list. All intervening messages will be selected along with the second message.

## Step 2 Hint

You can print multiple messages, just select all of the messages you wish to print.

To select multiple messages, hold down the CTRL key and click on each additional message line to be added.

**or**

To add a range of messages to be marked or unmarked, select the message at the top (or bottom) of the list, hold down the SHIFT keys and click on the message at the bottom (or top) of the list. All intervening messages will be selected along with the second message.

## Step 2 Note

If the folder contains any messages you will be asked to confirm deletion of the messages. If you do not wish to proceed, click **No**, otherwise click **Yes.**

## Step 1 Hint

Regardless of which address line is highlighted when you open the Address Book, you will be able to make entries in any address line. However, when you double-click on a name, it will be entered in the address line which was highlighted when you opened the Address Book.

## Step 2 Hint

Once inserted in your message, you can edit, move, or delete the TagLine like any other text.

## Hint for Show Folders

When you choose not to display the folders, the Message and Message Body sections of the main screen will be widened to occupy the space, thereby displaying more information.

## Note for Warn me before permanently deleting mail

Mail will be permanently deleted if it is deleted from the Deleted Items folder or, if the Don’t send deleted mail to the Deleted Items folder checkbox is marked, whenever deleted. With this checkbox marked, you will receive a message under whichever circumstance is appropriate.

## 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, to a lesser extent, 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 now 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 quite a few of them.

This is not what you would normally see in a Related Topics window. You can close this window in the usual manner.

## 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 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, closely related topic.   This button is used when there is only one other topic that is closely related.   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(TMMAIL.HLPï¿½TMMAIL_Using_This_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(TMMAIL.HLPï¿½Tmmailx_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(TMMAIL.HLPï¿½TMMAIL_Using_This_Help_System)<<1} Using This Help System

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<_____153.bmp|_____154.BMP<JumpId(TM.HLPï¿½CALEND1_Activity_Manager_Setup)<<1}

## Follow-on Topic #2

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

{ewc rhgbtn32.dll, BlueSkyHelpButton, g<contup01.bmp|
contdn01.BMP<JumpId(TMMAIL.HLPï¿½TMMAIL_Using_This_Help_System)<<1}

## Note for Step 3

The only required information is the E-mail address. If there is not an entry in **Display as,** then the E-mail address will be displayed in the **To:** (**CC:** or **Bcc:)** line when the card is applied to a message. It is possible to create an entry with no information, but such an entry will not be usable.

## Step 1 Note

You must already have a list of recipients to establish a group.

## Step 4 Hint

To select multiple individuals, hold down the CTRL key and click on each additional individual to be added.
**or**
To add a range of individuals, select the individual at the top (or bottom) of the list, hold down the CTRL+SHIFT keys and click on the individual at the bottom (or top) of the list. All intervening individuals will be selected along with the second individual.
**or**
Click and hold the left mouse button and drag through all individuals you wish to select.

You can add all current individuals in your Address Book by clicking **Add All**.

## Step 2 Note

To view the groups, double-click **Personal Addresses**. The list of groups will be displayed below **Personal Addresses**.

To select multiple addresses, hold down the CTRL key and click on each additional address to be added.

**or**

To add a range of addresses, select the address at the top (or bottom) of the list, hold down the CTRL+SHIFT keys and click on the address at the bottom (or top) of the list. All intervening addresses will be selected along with the second address.

**or**

Click and hold the left mouse button and drag through all addresses you wish to select.

## Step 4 Note

When you delete a group, the members of the group will not be deleted. You must specifically select individuals for deletion.

## Note for Step 13

Logging on to TeleMagic does not launch TeleMagic. When TeleMagic Internet Mail is logged on to TeleMagic, it has access to your TeleMagic databases. This makes certain functions available that are not available when Internet Mail is not logged on to TeleMagic. For example, you must be logged on to TeleMagic to use the Contact Lookup function.

This setting only applies when launching Internet Mail external to TeleMagic. Internet Mail is automatically logged on to TeleMagic when launched from TeleMagic.

## Note for Step 1

You can only edit the Address Book from the main TeleMagic Internet Mail screen. You cannot add new addresses if you have accessed it from the Compose Message dialog box.

## Note for Addressing Messages

When you enter an address directly in an address field, you can edit it directly in the field. If you enter an address from an address book, you will not be able to alter it in the address field. You can delete the address from the address field no matter how you entered it.