Contents

During installation, you had the choice of installing one of three help files for use with TeleMagic. You have selected to include the smallest help. This file consists of errata which has been noted in the printed documentation, and context sensitive help. To access the errata files, click on **Search** from any help window and select the Errata topic. To access context sensitive help, click **Help** or press F1 at a dialog box. You will be given a help topic that details each option on the dialog box.

The larger help files contain everything found in this file, plus detailed information on all TeleMagic features, step-by-step instructions, helpful examples, important notices and warnings, and tips, tricks, and technical notes. Follow the instructions below if you would like to change to one of the larger help files.

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

   The Welcoming screen will open.
5. Carefully read and follow any instructions on the opening screen. Click **Next>** when you are ready to proceed.

   The Install Type screen will open.
6. 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.
7. Enter the path to your TeleMagic root directory, if different from the one offered, and click **Next>**.

   A Select Components screen will open. Select any additional databases that you want to install, if any.
8. Click **Next>**.

   The Select Components screen will open.
9. Select the desired help file and click **Next>**.

   When you click **Next>**, the help file installation will commence. A status bar will apprise you of the status. When the process is complete, you will be returned to the TeleMagic Installation screen.
10. Click **Exit**.

    The Setup program will close.

Warning!

If you have replaced the Medium or Large help with this help file, insure that the TM.CNT and TM.GID files have been deleted from your \TM\HELP directory. Using TM.CNT with this help file will result in errors, some of which may require rebooting to recover. The TM.GID file is automatically generated the first time the help system is run. If this file is present, WinHelp will attempt to open TM.CNT whenever the help system is accessed. You only need to delete this file once; a new one will be generated the first time you access the help system. These files are normally removed automatically when changing your help system. You only need to check for them being present if you experience problems after changing the help system.

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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.

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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 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:\TM\PROGRAMS\TMMAIL.EXE /CLEANREG=???

If your TeleMagic installation is not C:\TM, 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.

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.

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.

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.

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.

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.

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.

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.

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.)

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.

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: .

J `Pager` fields contain pager numbers. When you click on the pager icon the Wireless Messaging dialog box will open.

J `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.

J `OLE - General` fields hold pictures, sounds, charts, graphs, animations, and other objects created in other programs.

J `E-mail Address` fields contain e-mail addresses. When you click the e-mail icon your default e-mail client will open.

J `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.

J `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.

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.

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.

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.)

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

The Add 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. 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.

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. 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.

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> 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.

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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.

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.

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.

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.

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.)

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

- 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.

- The Forecast vs. Actual report will produce a report comparing the `Sale Amount` field to the calculated forecast amount.

- 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.

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.)

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

J To generate a standard, text-based report, click the `Report` radio button.

J If you have groupings established and want to see your report in the form of a graphic chart, select the `Graph` radio button.

J 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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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).

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).

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

J 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.

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.

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.

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.

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. (This replaces the **Dial** button when a call is in progress.)

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

Set Multiple Recalls 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.

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.

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.

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.

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.

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.

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.

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.

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.

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**.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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`.

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.

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`.

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.

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.

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.

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.

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.

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.

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.

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.

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>
> 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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

Select a Level to Index Dialog Box

Click the button corresponding to the level on which the index is to be based.

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.

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.

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.

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.

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.

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.

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.

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.

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**.)

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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).

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.

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.

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.

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.)

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.)

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.

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.

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.

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.

> **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.

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.

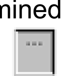
Tabs

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.

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. 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.

> **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.

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.

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.

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.

Fax

This field is used with the Faxing feature to automate faxing your contacts.

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.

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.

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.

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.

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.

Add / Remove / Copy

Clicking these buttons allows you to create and manage your function keys.

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.

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.

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**.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

The Copy Resource Dialog Box

Copy resource (resource name) to

Enter the new name for the copied resource.

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.

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.

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.

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.

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.

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.

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.

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.

TeleMagic for DOS to TeleMagic for Windows Conversion Utility

During conversion, TeleMagic will create a single-page Contact View for each level. These views will display only TeleMagic for DOS default fields.

WARNING!
There is a strict limit on the number of fields that this utility will convert from TeleMagic for DOS to TeleMagic for Windows. The maximum number of fields FoxPro allows on a level is 255. Of these, TeleMagic for Windows automatically uses three: a Contact ID field, Start field, and a Last Revision field. This means that, including calculated fields, you may have no more than 252 fields in a database. If a database contains more than that, the conversion program will respond with a message saying the DOS database has too many fields.

TM-DOS System Directory

Enter the path to the system directory of your TeleMagic for DOS installation. Click the **TM-DOS System Directory** button to open a search window, if desired.

TM-Win Global Directory

Enter the path to the global directory (\TM4 by default) of your TeleMagic for Windows installation that will receive the converted database(s). Click the **TM-Win Global Directory** button to open a search window, if desired.

Databases to Convert

This is the list of the databases that have been selected for conversion.

Add

Click this button to open the Convert Database dialog box, where you can select a database to add to the list of Databases to Convert.

Remove

Remove the highlighted database from the list of Databases to Convert.

Change

Click this button to open the Database Conversion Information dialog box, where you can select items to be converted in the highlighted database, such as recalls, indexes, list boxes, etc.

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.

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.

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.

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.

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.

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**.

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.

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.

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.

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.

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.

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.

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.)

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.

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.

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.

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.

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.

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.

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.

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.

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.)

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.

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.

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.

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.

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.

The Output Filename Dialog Box

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.

The Wireless Message Detail Dialog Box

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.

The Edit Holidays Dialog Box

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.

The Tasks Assigned by User (user ID) Dialog Box

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.

The Accept/Reject Activity Assignment Dialog Box

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.

The Comment for Pending Assignment Dialog Box

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.

The Center Objects Dialog Box

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.

The Line Properties Dialog Box

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.

The Add View or Page Dialog Box

Add View
Click this button to add a new view.

Add Page
Click this button to add a new page to the current view.

The Add Script Dialog Box

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.

The Add Branch Dialog Box

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.

The Select External Documents To Fax Dialog Box

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.)

The External Document Description Dialog Box

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.

The Select Standard Reports To Fax Dialog Box

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.)

The Copy Quick List Dialog Box

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.

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.

The Record Initialization Dialog Box

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.

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).

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).

The Notebook Browse View

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.

The Edit Script Dialog Box

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.

The Edit Branch Dialog Box

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.

The Change Document Description Dialog Box

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.

The Reset Unique Number Fields Dialog Box

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.

The External Program Dialog Box

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.

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.

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.

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.

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.

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.

The Unable to Locate Activity Files Dialog Box

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.

The Delete Word Processor Document Dialog Box

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.

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.

The Create Record? Dialog Box

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

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.

The Limited List Box Dialog Box

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.

Select Users

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.)

The Which Activity? Dialog Box

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.

Import Format Name

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.

Import Format Type

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.

Import Activity Files?

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.

Locate the TMCUMAST.DBF File

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.

Locate and Identify the Related Files

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.

List of File Types

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.

Locate TeleMagic Files

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.

Create Import Expression

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.

Match Source Fields with Target Fields

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.

Include Activities

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.

Select the Import Mode

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.

Select Action to be Taken when Validation Fails

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.

Select Action to be Taken if the Record Already Exists

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.

Select When to Update the Index Order

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.

Perform Field Calculations During Import?

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.

Stamp Notepad

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.

Progress Display Update

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.

Include and Filter DOS Activities

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.

DOS Call History File

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.

Create Activities Based on the DOS RCL Field

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.

Import Filters, Indexes, and List Boxes

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.

Attach Imported Activities to What Level

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.

Identify Parent-Child Relationships

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.

Locate and Identify the Source Import File

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.

SDF Field Parser

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.

Filter Activities Based on Date Range

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.

Select Users for Whom to Import Activities

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.

How Should Duplicate Records be Identified

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.

Select Index

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.

Create Temporary Index

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.

Specify Memo Fields to Contain Rejected Data

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.

Include Activity Records

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.

Select Enterprise Users for Whom to Import Activities

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.

Locate the TMAPPTS.DBF File

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.

Locate the TMACMAST.DBF File

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.

Import Field Rules

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.

System Information - User Page

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.

System Information - Database Page

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.

System Information - Current Record Page

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.

System Information - System Page

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.

System Information - Environment

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.

System Information - Dealer Info

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.

Advanced Contact Search

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.

Select a Contact

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.

Select Time

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.

Sales Forecasting Properties

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.

Tack-It

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

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

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

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

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

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)

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.

Print Preview

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.

List Type

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.

Grid Size

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.

Database Description (Usage) Dialog Box

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

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.

DSS Files

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

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

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

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

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

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

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

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

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

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

List of Custom Merge Fields

All Custom Merge Fields for the current document are listed in this field.

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 remove the selected Custom Merge Field.

Add a Merge Field

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

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

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

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

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

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

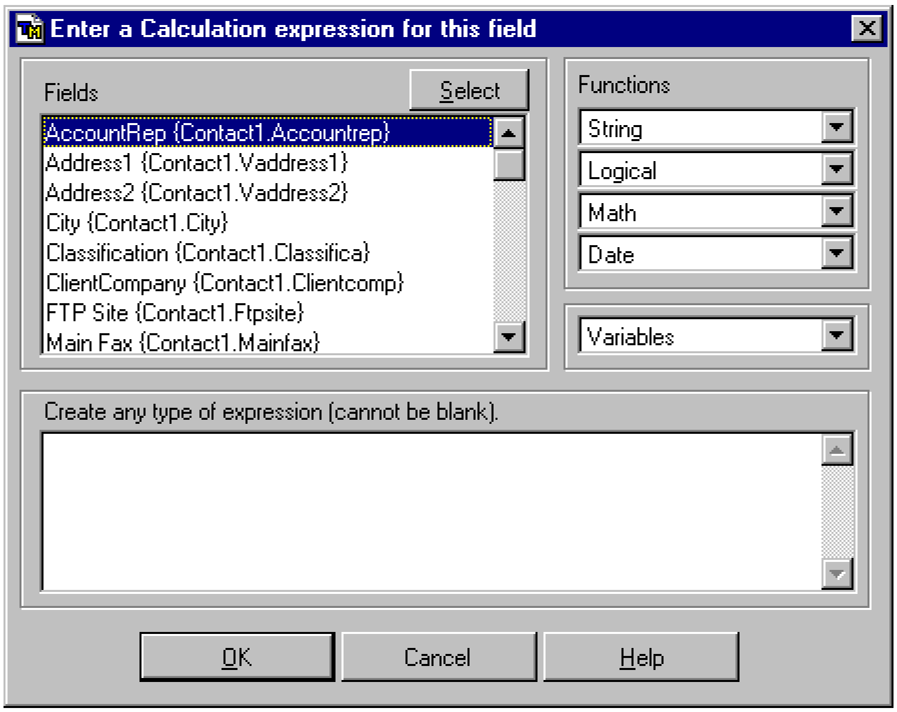
Click this button to make a copy of the selected import format. By default the copy will be named "Copy of <original format name>". You can change the name by selecting the copy and clicking **Change**. The name is on the Source File page of the Import dialog box.

Expression Builder

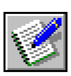
{ewc rhgbtn32.dll, BlueSkyHelpButton, g<RELAUP01.BMP|RELADN01.BMP<Klink(Expression Builderï¿½ ï¿½ ï¿½)<<1}

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

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

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

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 both upper and lower-case characters, there should be a separate entry for each.

Contact Link

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.

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).

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.

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.

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

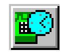
Getting Started Errata

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**.