

Thank you for choosing **The Phone Master!** We hope you find this software useful! The following is the outline of using the software. This information can be found on-line by choosing Help while you are at any prompt.

Note: The on-line information will contain more up to date information on the Phone Master features.

Section 1 What Is Phone Master?

The Phone Master is a powerful yet easy to use organizer. It was designed for use by people who need to be able to quickly look up information on a person and help organize data.

S O M E F E A T U R E S

CUSTOMIZED LABELS

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You can customize all labels in order to use the software your way. To modify a label simply click on the label you would like to change and type the new description. Or use the pull down menu to enable all labels. You may save your work to a label file by choosing "LABELS" and "SAVE" from the pull down menu. If you would like to use the saved labels on a different file you can load the saved label file after you create the new Phone Master file.

Note

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To create a new Phone Master file choose "FILE" and "NEW" from the pull down menu.

REMINDER BOXES

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Reminder boxes are the best way to keep yourself organized! You may use the search feature to reload the list box based on the what you want to see. For example, if you need to call someone tomorrow you can add the name to your directory and click on NEED TO CALL. The next day you can search on the box marked NEED TO CALL. The system will load the selection box with only the names you marked NEED TO CALL. You can also print a standard report on each of the names which match this criteria. You can refresh the selection box with all the names in your file whenever you want.

AUTOMATIC DIAL

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If you own a modem and have your phone plugged into the modem you can let Phone Master dial the phone for you. You can use the smart directory feature to dial other modems.

SMART DIRECTORY

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You can use Phone Master to keep track of regular phone numbers (phone numbers of people) AND modem numbers. When you select a modem number and click on the "DIAL" button the Phone Master will bring up a terminal package for you to communicate with! To instruct Phone Master that a number is a host click on the button marked "host."

SORTS YOUR WAY

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The selection box can sort on any field you would like to, Company Name, Last name, phone number etc... It can be changed at any time. Since you decide what to call the labels the software can be a powerful organizer! To change the fields select "OPTIONS" and "ENVIRONMENT" and use the pull down selection box to select a new field to select names from. In the environment area you can also change:

- * Whether to show picture buttons or named buttons.**
- * If you have a modem installed**
- * How to dial (pulse or tone)**
- * Whether or not to dial host or standard numbers.**
- * What (if anything) to dial before and after numbers (for example a "9" for an outside line before dialing)**
- * Whether to display names which have no data in the list box.**
- * Whether or not to automatically load the clock.**

Section 3

Searching For Data

The **Phone Master** has a powerful and easy to use search feature. you can search for a name either by changing the column the system displays in the selection box (for example use company name instead of last name), selecting names that have a check box checked or just search for text. Each of these is described below.

ENVIRONMENT SETUP

* Specifying Which Column To Sort On *

If you enter environment setup (choose OPTIONS and ENVIRONMENT) you may select which data field you would like to use for loading the names into the selection box (the selection box is the box in the right hand corner that you use to select names with). When you first install **Phone Master** the selection boxes loads the last name of each person. You may change this to ANY field.

**** Using Check Boxes ****

On the bottom of the form there are six check boxes. You may give these boxes any labels you would like. For example if you are in the tech support field you may want to label each box with a product. That way when a client calls you will know which product he or she needs support on. Or if you are in sales you can assign each client a different rating. Say "Cold Call", "Prospect", "Hot" and "Client". Or if you are simply using The Phone Manager as a phone organizer you may label each box as you would on a phone memo. For Example: "Need To Call", "Reminder" etc...

The power of the organizer comes into play when you use the search capability in conjunction with the check boxes. If you click on the search button you will be given the choice to each search for text (explained below) or search the check boxes. Select the check box control and you will see the name for each of the check boxes. If you select one of the

names and choose "search" the system will reload the selection box with ONLY the names which you have checked.

Important Note: The check box marked "HOST" when you first use The **Phone Master** (far right box) has a special feature. If you check on this box you are telling the **Phone Master** that it will be dialing a modem. If you choose to dial the phone and this box is checked, the Phone Organizer will bring up a communication package for you to communicate with.

Section 4 The Environment

A description of each of the selections on the environment screen.

* Show Picture Buttons *

If Checked

Shows pictures in each of the buttons

If Not Checked

Shows Text in each button

Info: When you are learning the software it may be more helpful to show text on the buttons rather than pictures.

* Modem Installed *

If Checked

System takes advantage of modem. Allows you to choose a com port.

Info: If your phone is plugged into a modem you can use the **Phone Master** to dial your phone and dial other modems using the built in communication package. If this is not Checked the option to dial will not be available.

* Dial Standard Numbers *

If Checked

System will dial voice numbers

Info: If this is Checked you can prevent the dialing of voice numbers. You may specify whether or not a number is a voice number by clicking on the check box on the far right (bottom of main form). If it is checked the record is designated as a standard number.

* Dial Modem Numbers *

If Checked

System will dial modem numbers

Info: If this is Checked you can prevent the dialing of modem numbers. You may specify whether or not a number is a voice number by clicking on the check box on the far right (bottom of main form). If it is checked the record is designated a modem number.

* Dial Before Number *

If Checked

System prompts you for a string to dial before dialing the phone number.

Info: This is extremely useful if you must dial a code to get an outside line (on a switchboard). For example if you must dial a "9" to get an outside line you can enter it here and it will dial this before each phone number is dialed.

Helpful Hint: You may use commas "," to cause a pause.

* Dial After Phone Number *

If Checked

System prompts you for a string to dial AFTER it

dials a number.

Info: Same as above except the string is dialed after the phone number is dialed.

*** Selection Box Sort ***

This is a pull down menu. You can specify what data should be used in the selection box on the main form. When you first enter the software all names are sorted on last names. If you would prefer a different sort (such as company name) all you need to do is select it here. This will be the default sort each time you enter the software.

*** Show Items Without Data ***

If Checked

Items without data are shown in the selection box.

Info: This box determines whether or not the software should include names in the selection box which do not contain data. For example if you sort on Company Name some items may not have data. If this is left unchecked those names will not appear in the box. If you check this, however, those names will be shown at the top of the list with the persons last name shown and the note that there is no data.

* Automatically Load Clock *

If Checked

The alarm clock automatically loads each time you start The **Phone Master**