

ALL the fields in this window may be removed (and many may be added) using the personalization module.

The image shows a software window titled "Customer Window". At the top, there is a blue title bar with the text "Customer Window" and standard window control icons. Below the title bar, the text "Name (abbr.)" is displayed. The main area contains several input fields and labels: "Name (abbr.)" and "Name" (both in text boxes), "Crea. Date 12/11/95" and "Mod. Date 12/11/95" (displayed text), a row of fields for "#", "Street", "City", "Stat", and "ZIP", a row for "Telephone #", "Fax #", and "SwitchBoard #", a row for "Ind. Class.", "Growth Poten.", and "Tec. Limit" (each with a dropdown arrow), a row for "Bank", "Agency", and "Account #", and a text area containing "Note: Alt-M to Max." with scroll arrows. At the bottom right, there are "OK" and "Cancel" buttons.

The short name of the company as it will appear in the lists and the long company name

The Industry classification of the company. This field may be picked up by the Ind Class Table.

The record creation and last modification date.

Note: the record is considered modified when the OK button is pressed also if no actual modifications have been made to the record fields.

The company address.

The company various telephone numbers. Note that international telephone numbers must start with a +; if a space is inserted the default area prefix is automatically inserted. Alphabetic Numbers (like (800) CALL-ACME) are not accepted.

The company credit information.

The company budget information

The company potential for growth. This field may be picked up by the Growth Pot. Table.

Using these buttons it is possible to create an order, note, appointment, Sales Opportunity for the customer.

The list of the agenda items linked to this customer. To view the agenda record double click on the item. To delete it press the delete key on the highlighted one. To exit press TAB or SHIFT-TAB.

Ok and Cancel buttons: the Ok button SAVE the modifications the Cancel button exit without saving the modifications.

ALL the fields in this window may be removed (and many may be added) using the personalization module.

The screenshot shows a window titled "Contact Window" with a standard Windows-style title bar. The window contains several input fields and controls:

- Title:** A dropdown menu with a downward arrow.
- First name:** A text input field.
- Mid. In:** A text input field.
- Last name:** A text input field.
- Category:** A dropdown menu with a downward arrow.
- Firm Name:** A text input field containing the text "AREBUS".
- Work #:** A text input field.
- Street:** A text input field.
- City:** A text input field.
- State:** A text input field.
- ZIP:** A text input field.
- Home #:** A text input field.
- Street:** A text input field.
- City:** A text input field.
- State:** A text input field.
- ZIP:** A text input field.
- Work Telephone #:** A text input field.
- Secondary Tel #:** A text input field.
- Home Telephone#:** A text input field.
- Cellular #:** A text input field.
- Fax #:** A text input field.
- SwitchBoard #:** A text input field.
- e-Mail:** A text input field.
- Working hours From:** A time input field set to "0:0 AM".
- To:** A time input field set to "0:0 AM".
- BirthDate:** A date input field with a downward arrow.
- For Christmas:** A dropdown menu with a downward arrow.
- For the BirthDay:** A dropdown menu with a downward arrow.
- Note:** A text area containing the text "Note: Alt-M to Max." with up and down arrows on its right side.
- OK:** A button.
- Cancel:** A button.

Contact Name. The title may be picked up from the title table.

Contact category. This field may be picked up from the Category table

Contact Firm. If the contact is in a group of a customer this field is automatically filled

Contact home and work addresses.

Contact Telephone numbers. Note that international telephone numbers must start with a +; if a space is inserted the default area prefix is automatically inserted.
Alphabetic Numbers (like (800) CALL-ACME) are not accepted.

Contact working hours

Contact Birth Date. This date field is a 'smart' field: it is possible to insert only a partial date (for example if you are in December to insert the 1 Dec. date is enough to insert 1 to insert the date of this week Wednesday is enough to insert W).

What to do for this contact for his birthday and for xMas. If one of the entries in the table is selected a To Do is inserted in the Agenda for the day. P.e. if the contact is born December 1th and Flower is selected from the x Birthday combo an Item for the 1th of decemenr saying Send flower to *contact name* is insterted in the agenda.

Any comment you may want to insert. This comment field is 64000 characters long. Note that with ALT-M the comment window became as big as the contact window; ALT-M again reduces the window to its original dimensions

The list of the agenda items linked to this contact. To view the agenda record double click on the item. To delete it press the delete key on the highlighted one. To exit press TAB or SHIFT-TAB.

Using these buttons it is possible to create an Appointment or a Sales Opportunity for the contact.

The note Text. This comment field is 64000 characters long. Note that with ALT-M the comment window became as big as the note window; ALT-M again reduces the window to its original dimensions

The Note title.

ALL the fields in this window may be removed (and many may be added) using the personalization module.

Notes Window

Title

Text: Alt-M to Max.

Crea. Date 12/11/95 Mod. Date 12/11/95

ALL the fields in this window may be removed (and many may be added) using the personalization module.

The image shows a screenshot of a software window with a light blue background and a dark border. The window contains the following elements:

- Top-left corner: A small icon of a pen nib.
- Top-right corner: A small icon of an anchor.
- Form fields:
 - A text box containing "BML".
 - A text box containing "Black Pen Tye 33".
 - A text box containing "BML-33-NN".
 - A label "Price" followed by a text box containing "L. 20.000".
 - A label "Discount" followed by a text box containing "3".
- A large text area containing the text "This is an example for the help file|".
- Bottom: Two buttons labeled "OK" and "Cancel".

Product Short Name. Will be used in the order module to identify order items.

Product Short Name. Will be used in the order module to identify order items.

Product long Name

Product Numbers

Product Price

Product Discount

The Product long description. This comment field is 64000 characters long. Note that with ALT-M the comment window became as big as the product window; ALT-M again reduces the window to its original dimensions

The Product Last Modification Date.

Note: the record is considered modified when the OK button is pressed also if no actual modifications have been made to the record fields.

ALL the fields in this window may be removed (and many may be added) using the personalisation module.

The image shows a window titled "External Document W". The window contains a form with the following elements:

- A "Title" text input field.
- A second text input field with a file selection icon (three dots) to its right.
- Record metadata: "Record Creat. 12/11/95" and "Record Mod. 12/11/95".
- Two buttons: "OK" and "Cancel".

The window also features a toolbar at the top with a pencil icon on the left and an anchor icon on the right.

The title of the internal document. Will be used to identify the document

The internal document file name. It MUST be valid DOS file name. Keep care to insert the correct extension; it will be used by FC to open the right file.

External Document file type. The kind of file you are trying to open.

ALL the fields in this window may be removed (and many may be added) using the personalization module.

ACME Inc		For The		8/13/95		Print
33	Bill Street	Muskgrown	NY	4524551		OK
Billing	Street	City	ate	ZIP		Cancel

Prs	Product	Description	Qty	Price	Total
<input checked="" type="checkbox"/>	BML	Black Pen Tye 33	3	\$2,000.00	\$6,000.00
<input type="checkbox"/>				\$0.00	\$0.00
<input type="checkbox"/>				\$0.00	\$0.00
<input type="checkbox"/>				\$0.00	\$0.00

S \$39.00
\$6,039.00

The Order firm. Here you may insert for which Company the order is taken; note that if the order is inside a company group this field is automatically filled.

The Order date. This date field is a 'smart' field: it is possible to insert only a partial date (for example if you are in December to insert the 1 Dec. date is enough to insert 1 to insert the date of this week Wednesday is enough to insert W). Note

Order billing and receiving addresses.

Item Delete button: check this button to delete an item that has been inserted; next time you will enter the system the item will not be present anymore.

Product Name. Insert here the name of the product.

When you press CR or Tab a look-up will be made over the Product data base.

If only one match is found the other order item fields are filled; if more than one match is found you will be able to select the one you want from a list; if no match is found a message will ask you if you want to Retry or if the name You inserted is

If you press RETURN You are automatically brought to the Order Tax field.

NOTE the match is case sensitive.

The product long name as it appears in the product file. Clicking over this field display a small window containing the comment inserted in the product file.

How many item of the product you are selling. It is used to calculate the total.

The product price as found in the product DB.

The product discount as found in the product data base.

The Order Item Total

A field to insert Order Tax

The Order Total

Using these buttons it is possible to create a Note or to link an external document to the Order

Clicking this button the order is printed

ALL the fields in this window may be removed (and many may be added) using the personalization module.

The image shows a software window with a textured background. At the top left, there is a pencil icon. At the top right, there is an anchor icon. The main content area contains several fields: a text box with "ACME inc.", a "Number" field with "22", a "Value" field with "\$2,000.0", a "Probability" field with "3", and a "Delayed" field. To the right of the "Probability" field is a dropdown menu with a downward arrow. Below the "Delayed" field is a radio button labeled "Remember Me". A large text area below these fields contains the text "This is a note for the SO Example" and has a vertical scrollbar on its right side. At the bottom of the window are two buttons: "OK" and "Cancel".

The info on the Firm you have the business opportunity with. If the Sales Opp. is inside a customer group this field is already filled.

The Sales Oppy Number

The SO Value

The probability You have to close the oppy.

The Oppy status

Has the oppy become an order

If the oppy is hold till when it is on hold.

If you check the remember button an agenda item is inserted to remember You to follow up the oppy.

The date field is a 'smart' field: it is possible to insert only a partial date (for example if you are in December to insert the 1 Dec. date is enough to insert 1 to insert the date of this week Wednesday is enough to insert W). Note that today date

The oppy description. This comment field is 64000 characters long. Note that with ALT-M the comment window became as big as the appointment window; ALT-M again reduces the window to its original dimensions

The list of the agenda items linked to this oppy. To view the agenda record double click on the item. To delete it press the delete key on the highlighted one. To exit press TAB or SHIFT-TAB.

Using these buttons it is possible to create an order, note, appointment, for the oppy.

ALL the fields in this window may be removed (and many may be added) using the personalization module.

The screenshot shows a dialog box titled "Appointments Window". It features several input fields and controls:

- Type**: A dropdown menu.
- Subject**: A text input field.
- Date**: A date input field with a dropdown arrow.
- From**: A time input field showing "0:0 AM".
- To**: A time input field showing "0:0 AM".
- Priority**: A small square input field.
- Color**: A color selection field showing a yellow pattern with a dropdown arrow.
- Radio Buttons**: **To Do** and **Done**.
- Reschedule**: A button with a dropdown arrow.
- Alarm List**: A vertical list of radio buttons for alarm durations: **Alarm**, **Five**, **Ten**, **Fifteen**, **Thirty**, **1h**, and **2h**.
- Comment**: A large text area with a vertical scrollbar.
- Buttons**: and at the bottom.

Appointment type. Select one of the available type here; the type will be displayed as an icon.
Note: you may insert your own types in the Agenda types table; if you check the Important button the custom defined type will appear as a ! if the 'Important' button is not checked as a ?.

Subject: the subject of the appointment - To Do.

Agenda To Do Button. When this button is checked the record is inserted in the To Do list.

Reschedule; if the appointment - To do is of repetitive nature you may select here its periodicity.
An identical record will be added for the new date.

Agenda item priority.

If you want to be reminded by the system x minutes before the starting appointment time check the appropriate button. In the example the system will remind you of the appointment at 9.45.

The date of the appointment (this field must not be left empty) and the starting/ ending time of the appointment; if starting and ending time are left empty the appointment will not appear in the hourly calendar.

The day field is a 'smart' field: it is possible to insert only a partial date (for example if you are in December to insert the 1 Dec. date is enough to insert 1 to insert the date of this week Wednesday is enough to insert W). Note that today date

The Agenda comment. This comment field is 64000 characters long. Note that with ALT-M the comment window became as big as the appointment window; ALT-M again reduces the window to its original dimensions

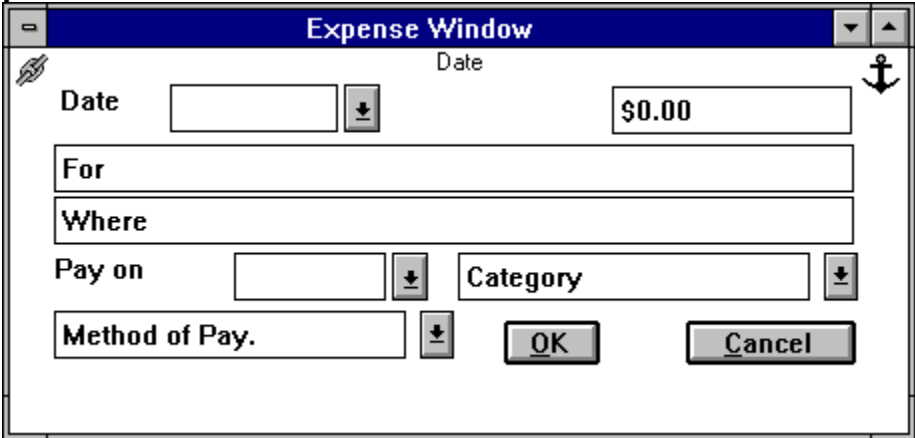
The Color that will be used to represent the agenda item

If the activity has been done.

Shows which items are connected to the current record

Allows to create a child of the agenda item

ALL the fields in this window may be removed (and many may be added) using the personalization module.



The image shows a software dialog box titled "Expense Window". The title bar is blue with the text "Expense Window" in white. Below the title bar, there is a pencil icon on the left and an anchor icon on the right. The main area contains several input fields and buttons:

- A "Date" label above a text box and a dropdown arrow.
- A text box containing "\$0.00" with a dropdown arrow on its right side.
- A text box labeled "For".
- A text box labeled "Where".
- A "Pay on" label above a text box and a dropdown arrow.
- A text box labeled "Category" with a dropdown arrow on its right side.
- A text box labeled "Method of Pay." with a dropdown arrow on its right side.
- Two buttons at the bottom: "OK" and "Cancel".

The expense date. This date field is a 'smart' field: it is possible to insert only a partial date (for example if you are in December to insert the 1 Dec. date is enough to insert 1 to insert the date of this week Wednesday is enough to insert W). No

The expense amount

The expense motivation

Where did you spend this amount

How did you pay this amount

In which category this expense fall.

When this expense is due. In other word, if you did not already pay it when you must issue the check (bank order ecc..) for it?

If you insert a date in this field a note will be created.

This field is a 'smart' field: it is possible to insert only a partial date (for example if you are ember to insert 1th of Dec. is enough to insert 1 to insert this week Wednesday is enough to insert W). Note that today date may be inserted with F8.

Introduction

Full Contact is a modular sophisticated PIMS joining in an integrated package: an Address book; a complete Time Organizer; a Mass Mailing engine; a WYSIWYG report writer an Expense tracking system and a Personalization engine.

Furthermore Full Contact can be installed on various independent systems and support data reconciliation between the various systems.

The tight integration between these components allows to operate smoothly and efficiently with minimum effort. The Full Contact ability to combine any kind of information with a contact or with an agenda item eliminates the need to remember weird filenames.

- How everything is glued - The Information Manager

Describes the main FC concepts and give you the base information needed to start working. **We strongly suggest that you read this chapter.**

- The Time Organizer How to use the calendar/agenda

- The Address Book Gives an in depth review of customers and contacts data files.

- Integrating with other application How FC is integrated in Windows and how to import in FC documents created outside FC.

- Expenses The expenses data file

- The Utilities Backup / Restore - Import / Export - Clean Up

- Distributed use; the Up Down load

- Preferences How to personalise Your Desktop environment.

- Mass Mailing How to create personalized letters, print and fax them; create and print labels and envelopes, etc.. .

- Dialling How to use telephone integration.

- Personalizing the environment How to use the personalization module

- The Report Writer How to define new reports using the report Writer.

- Training modules How to quickly learn to use FC using the training modules.

- Menus Main FC menus and menu choices

- How to The most commonly asked questions.

[How To Register](#) [Price](#) [Support](#) [Ombudsman statement](#) [What Is Shareware](#) [Registered](#)
[User Licence](#)

The main windows:

[Company](#)

[Contact](#)

[Note](#)

[Expense](#)

[External Document](#)

[Appointment](#)

Information Management

Full Contact integrates a lot of different functions in a consistent interface. This interface mainly manages Areas, Groups, Lists, Windows, Records.

What is an area in FC.

What is a group in FC.

What is a list in FC.

What is a record in FC.

Create - Modify - Delete a record.

How the information are connected.

Navigate & Select: how to find the information you need.

The Time Organizer

A good Time Organizer needs a good address book and vice versa.

Meetings, birthdays, letters to send do not exist in a void. Meetings are with people, birthdays are of people, letters are sent to people. And an address book take enormous advantages from an agenda, you manly interact with people at a certain time, etc., etc., etc... .

Full Contact Time Organizer has been made has easy to use has possible.

To create an appointment; to schedule an activity you may:

- A) drag an element in the calendar;
- B) simply move the mouse keeping the left button pressed;
- C) call from a menu a form;
- D) press a button;
- E) etc.. .

In fact you may select the way you found easier and then use it for the rest of your life.

The Time Organizer provides: ticklers; repetitive appointments; daily, weekly and monthly views of the calendar; an yearly planner; a monthly planner; ability to define appointments for a person with a drag&drop; sophisticated reports; wallpapers; etc.. etc., etc... .

[Appointments & To Do's: two kind of agenda entries.](#)

[Creating an Appointment: standard way](#)

[Creating a To Do: standard way.](#)

[View your appointments.](#)

[Creating an appointment: advanced ways](#)

[Creating a To Do: advanced ways](#)

[Modify an appointment](#)

[Delete an appointment](#)

[Define repetitive appointments.](#)

[Move an appointment to another day.](#)

[Alarms](#)

[The daily view](#)

[The Weekly View](#)

[The Monthly View](#)

[The Monthly Planner](#)

[The Yearly Planner](#)

[The Agenda reports](#)

[The Wallpapers](#)

[Clean Up The agenda.](#)

The Address Book

A good agenda needs a good address book. Meetings, birthdays, letters to send do not exist in a void. Meetings are with people, birthdays are of people, letters are sent to people. And an address book take enormous advantages from an agenda, you manly meet people on days etc.. .

Full Contact Address Book stores information on your contacts, companies, small notes and , recognising that you may want to connect to your contact a miscellaneous amount of information, FC may store an offer written with Write or AMI PRO or a LOTUS spreadsheet and connect them to your contact.

These information may be grouped, hierarchies may be made, they may be deleted and then recovered, may be searched (to which of my contact I have not telephoned in the last 20 days?); time may be allocated for one of them; reports may be created, etc.

Your information are Important so an integrated Backup/Restore utility is present. Your information may be sensitive so a password protection mechanism has also been included.

Today users work on many different computers; and, when they switch environment, to port the data from one system to the other is... difficult. FC provides an automatic UpDown load utility that port all the modification for You in a few seconds to your 'client' systems.

Information Management

The Data files:

Company

Contacts

Notes

External Documents

Integrating with other applications

Full Contact is a Windows application; that means that you may cut and paste data from/to Full Contact to/from any other application.

But Full Contact is not just another window application; it is a 'Contact Centric' system that tries to glue all your contact related information together. When You create a document using a WP or a spreadsheet, you normally do that for a specific customer; Full Contact allows you to connect these documents to the contact and company information stored in FC. [The External Documents](#)

Full Contact is also a Full DDE server; you may exchange information between FC and other applications like spreadsheets and WPs. [Using DDE](#)

The Expense Log

To remember, and maybe to charge, Your expenses is as important as to gather orders; FC provides a small expense log in which you may enter and classify Your expenses. Expense

Note that due dates are automatically inserted in the agenda.

The Utilities

FC provides various 'utilities' that you may use to:

Backup/Restore the Data Base

Export/Import data from/to delimited files

Clean Up the Data Base

The Mass Mailing functionalities

One of the most important Pims functionalities is Mass Mailing. How many times do you need to send a letter to many of your customer / clients? And how nicer is to send a personalized letter.

The Mass Mailing module will increase your productivity and allows you to maximize your income sending the right information to the right people.

The Mass Mailing module allows you to send (or fax) personalized letters to a group of your customer (contacts) or to print address labels.

There are three basic operations involved in **sending a personalized letter**:

Create the personalized letter.

Create the Mail Merging Mailing list

Send/Fax The Letter

There are two basic operations involved in **printing address labels**:

Select the Mailing list

Print the labels/envelopes.

Dialing

Most of today contacts are by telephone.

FC provides two methods of dialing a telephone number:

With HotKey

From the Menu.

And you may easily record the telephone call outcome in a note.

The Training packages

Full Contact contains, to help You get quickly up to speed, of a set of training packages; from any window select the Help / Training menu item; a training on the functionalities of the currently selected window starts.

When the training is finished you may, selecting Help / Questions, control your level of knowledge of Full Contact.

The Menus

Full Contact is a MDI application; that means that different menus are available according to the selected window. Anyway a few menus are constant they are:

File

New Area

Select Area

Delete Area

All Areas

Change Menu

Preferences...

Exit

Windows

Tile

Cascade

Iconize

List of available windows

Help

Help Index

Keyboard

Mouse

Help On Help

About

Order

Register

Training

Test

What is an Area in FC.

Is an information area, for example your business contacts, or your personal contacts. If the product is used by more than one person an area may contain Your contacts another Your wife (husband) contacts etc..

Areas may be created using the New Area menu choice.

You may switch from one area to another using the Select Area menu choice.

An **empty** area can be deleted using the Delete Area menu choice.

A document, and all the document in its folder, may be copied using the **Document menu** Copy menu choice.

What is a group in FC.

Is a 'group' of records logically connected. To use an analogy with the everyday office life a group is the equivalent of a folder; like a folder it may contain different type of information (records).

PE: the ACME Inc. group's may contain: meetings, notes, contact records, etc.. .

A record, as it is possible to do with a folder based system using a photocopier, may be inserted in many groups.

See: [How the information are connected](#)

What is a list in FC.

Exactly what the name says: a list of records; they may be of the same type (a list of contacts) or of different types (the records contained in the ACME Inc. group).

What is a record in FC.

It is a 'group' of information logically connected that appear on a single window. For example: the information on Mr. John Doe (his address, tel #s, working hours etc...) are a record; the information on the meeting of the 22 with ACME Inc. are also a record.

Create - Modify - Delete a record.

CREATE:

Lets try to Create a new record.

First you must decide which record you want to create. Lets say you want to insert in FC a new Contact You just met.

Open Full Contact.

The Main Window appears.

*Open the Contacts Data: **Open / Contact** on the menu.*

*Now create a new contact: **Document / New.***

This window appears:

The screenshot shows a 'Contact Window' dialog box with the following fields and controls:

- Title (dropdown)
- First name
- Mid. In
- Last name
- Category (dropdown)
- Firm Name: AREBUS
- Work #, Street, City, State, ZIP
- Home #, Street, City, State, ZIP
- Work Telephone #, Secondary Tel #, Home Telephone#, Cellular #, Fax #
- SwitchBoard #, e-Mail, Working hours From: 0:0 AM, To: 0:0 AM
- BirthDate, For Christmas (dropdown), For the BirthDay (dropdown)
- Note: Alt-M to Max. (with up/down arrows)
- OK and Cancel buttons

Fill the details then press the OK button or, if you changed idea the Cancel Button.

Company Contact Note Expense External Document Appointment

MODIFY

Find the record you want to modify; highlight it and press return (or double click).

The window containing the details appears; modify the details then:

Save with OK (or Cancel).

DELETE

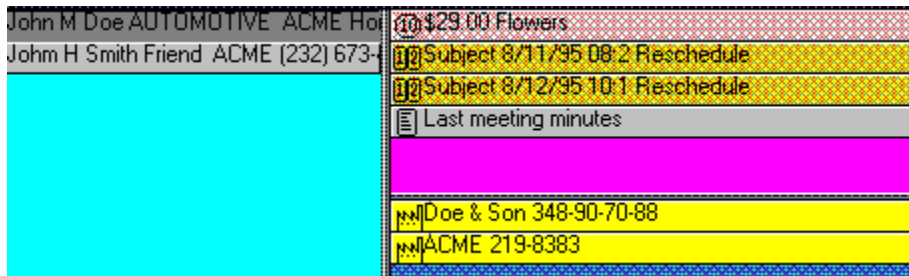
Find the record you want to delete.

Highlight it and press delete (or drag it to the wastebasket icon).

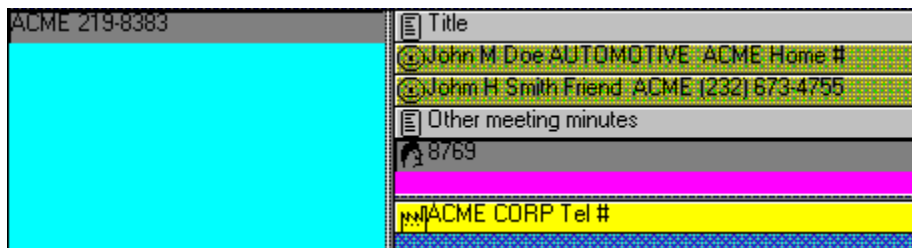
Note that you may delete many records at the same time; just select them at the same time.

How the information are connected

It is not possible to foresee how information are connected; what you will need at what moment (at least it is impossible for us to foresee it). As a consequence FC leave you total freedom to link every information to any other to form a group. Note Here is a little piece of the main screen:



You may see that: John Doe works for 2 firms ACME Inc. and DOE & Son (maybe he is a consultant) and that in his folder are contained various notes appointments etc... and a contact John II: his son.
Lets now look at ACME Inc.:



It contains various notes, Oppy, an order and two contacts: John Doe and John Doe II.

But HOW do I connect info together?

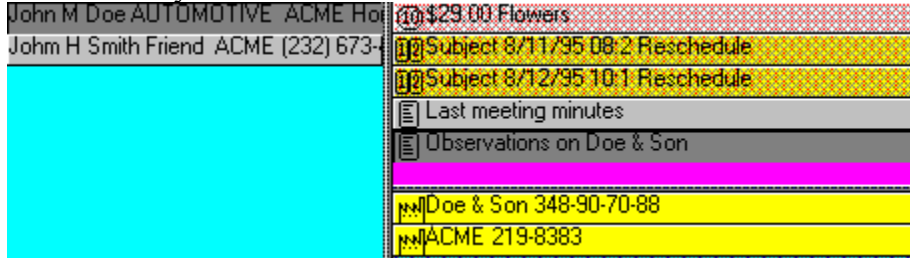
You may Create an information directly in a group.
To do that: Find the document you want to link the information to then:
Create a new document using **Add Document / Document type**

Alternatively you may open the document; click on the ancho icon on the upper-right corner and then click the icon representing the type of document you want to add.

And if I have already created a record and I want to put it in another group?

Select it; then Drag & Drop it in the group.

PE. If this is your main screen:



Select 'Observations on Doe & Son' and Drag it to John Doe II OR Open 'Observations on Doe & Son' and drag the WINDOW to John Doe II.

NOTE: you can also D&D between different windows.

Navigate & Select: how to find the information you need.

Once you have inserted your data you must retrieve them
There are many techniques to find the info you need:

A) You remember exactly what You want:

For example: You want the information on John Doe.

Open the Contact list and then using arrows, or mouse or keyboard keys (if you press the D key the first Contact of which the surname starts with D is highlighted) You highlight John Doe.

B) I want to look at a group:

For example: You want to look to the ACME Inc. group.

You open the Customer list and select ACME Inc. then you select Show Details on the right of the main list appears a little list containing all the record contained in ACME Inc.: the child list.

C) I want to found which group contains the note 'Increase in prices':

You open the Note file and find the 'Increase in price' record then you select Show Details.

On the right of the main list there is a little list containing all the record that contain the 'Increase in Prices' Note: the father list.

D) I have an item in the child or archive list and I want to see the documents in its group:

Highlight it and press *F12*.

E) I want to work on just three-four records and eliminate the others from the main list:

Highlight them (on the main list is possible a multiple highlighting) and then use the **Document / Select** menu item (or the icon if present on the tool bar)

F) I want to quickly search a contact:

Press F3 or select Quick Search

G) I want to see all the that have the following characteristics:

You must use the selection module.

PE. I want to see all the Contacts of New York.

Open the contacts list.

Invoke the selection module: using the **Document / Select** option.

This form appears:

The image shows a 'Select Window' dialog box with a blue title bar. The window contains several input fields and buttons. The fields are arranged in two columns, with a vertical column of downward-pointing arrows between them. The fields are labeled as follows:

- Crea. Date
- Mod. Date
- Title
- First name
- M.I.
- Last name
- Category
- Home #
- Street
- City

At the bottom of the window, there are four buttons: **OK**, **Cancel**, **Search**, and **Save**. The window also features a standard Windows-style title bar with a close button, a scroll bar on the right, and several icons at the top.

Here You may:

[Build a Selection expression](#)

[Save a Selection expression](#)

[Retrieve a Saved Selection expression](#)

Once done you must select the OK button.

The records that match the selection expression criteria will be displayed on the main list.

Build Your Selection Expression

You may build Simple selection expressions (that spawns a single file) or complex selection expression (that spawns more than one file).

A SIMPLE SELECTION EXPRESSION

PE. All the contacts living in NY and that have been created after the 10 Jan 1994.

In the combo Box you must select the selection criteria operator; the operators list vary with the kind of field.

You need to select one.

TAB till the Crea. Date label;

select 'After The'

Insert 01 10 94

TAB till the City label

select 'Equal'

Insert New York

Press OK.

The screenshot shows a dialog box titled "Select Window" with a blue header bar. Below the header are several icons: a printer, a document, a document with a magnifying glass, a document with a checkmark, a document with a dollar sign, and a document with a plus sign. The main area of the dialog is a table with two columns: field names on the left and selection criteria on the right. The "Crea. Date" row has "After The" in the operator column and "1/10/94" in the value column. The "City" row has "Equal" in the operator column and "NY" in the value column. Other rows are empty. At the bottom of the dialog are four buttons: "OK", "Cancel", "Search", and "Save".

Field	Operator	Value
Crea. Date	After The	1/10/94
Mod. Date		
Title		
First name		
M.I.		
Last name		
Category		
Home #		
Street		
City	Equal	NY

A COMPLEX SELECTION EXPRESSION:

PE. All the contacts living in NY and that have been created after the 10 Jan 1994 and with which I have had a meeting.

TAB till the Crea. Date label;

select 'After The'
Insert 01 10 94
TAB till the City label
select 'Equal'
Insert New York
You obtain this form:

The screenshot shows a 'Select Window' dialog box with a blue title bar. The window contains a list of fields on the left and corresponding input areas on the right. A vertical column of downward-pointing arrows separates the two columns. At the top of the window, there are several small icons: a document with 'NN', a document with a list, a document with '12', a document with '10', and a document with a dollar sign. The fields and their values are as follows:

Field Label	Value
Crea. Date	After The
Mod. Date	1/10/94
Title	
First name	
M.I.	
Last name	
Category	
Home #	
Street	
City	Equal

At the bottom of the window, there are four buttons: 'OK', 'Cancel', 'Search', and 'Save'.

Select the little Icon on the top that represent a little agenda A new selection form with different details appears.

The image shows a dialog box titled "Select Window". It contains several input fields arranged in two columns, separated by a vertical column of downward-pointing arrows. The fields are labeled as follows:

Crea. Date		↓	
Mod. Date		↓	
Type		↓	
To Do		↓	
Subject		↓	
Reschedule		↓	
isResh		↓	
Date		↓	
From:		↓	
To:		↓	
Priority		↓	

At the bottom left of the dialog box is a button labeled "OK". The dialog box has a blue title bar and a vertical scrollbar on the right side.

TAB till the Type label
select 'Equal'
Insert Appointment

Press OK.

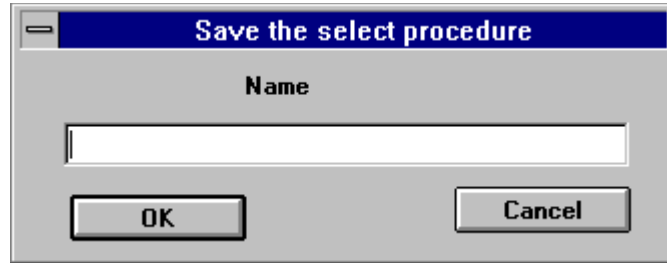
The form disappears.

Press OK.

The main list contains the contacts that match the selection criteria.

Save a selection expression

Once you have inserted your selection expression you may save it.
Press the Save button;



This little window appears:

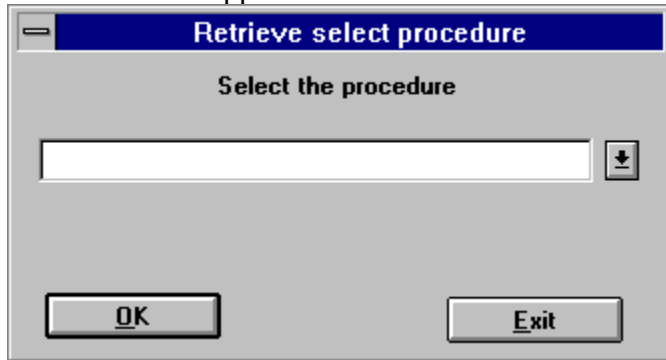
Insert the name you want to use for the Selection Expression.
Press OK.

Retrieve a Saved Selection expression

A saved selection expression may be retrieved.

To retrieve a saved selection expression: Press the Retrieve Button.

This little form appears:



The image shows a dialog box with a blue title bar containing the text "Retrieve select procedure". Below the title bar, the text "Select the procedure" is centered. There is a white text input field with a small downward-pointing arrow button to its right. At the bottom of the dialog box, there are two buttons: "OK" on the left and "Exit" on the right.

Select in the combo box the selection expression you want to retrieve.

Press OK.

The selection expression is shown; it may now be modified; when you finish press OK.

Appointments & To Do's: two kind of agenda entries.

An appointment has: a date; a starting hour; an ending hour. In theory when you define an appointment you know when it will start and when it will end.

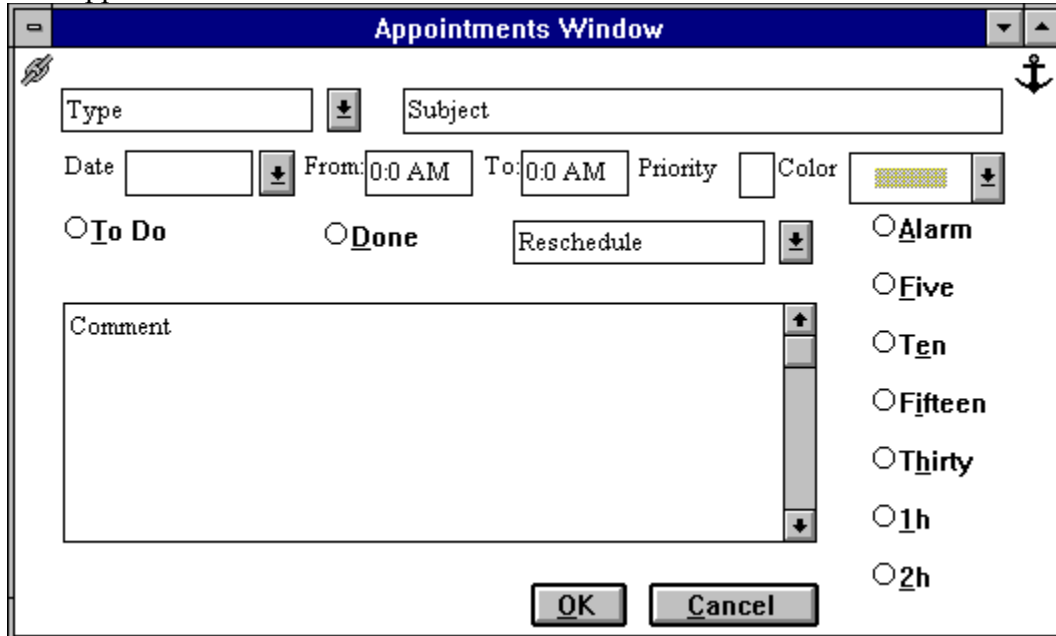
A To do has a date but does not have a starting and an ending hour; it is simply a chore that has to be performed during the day.

Appointments and To do's are showed differently in the agenda: the **appointment** is a button, with a little icon at the top representing the kind of appointment, starting at the starting hour and ending at the ending hour; the **To Do** is an item

Creating an Appointment: standard way

It is just identical to create any other kind of record in FC.

This Appointment window:



The screenshot shows the 'Appointments Window' dialog box. It features a title bar with the text 'Appointments Window'. Below the title bar, there is a 'Type' dropdown menu and a 'Subject' text field. The 'Date' field is followed by 'From' and 'To' time fields, both set to '0:0 AM'. There is a 'Priority' field and a 'Color' dropdown menu with a yellow patterned box. Below these are radio buttons for 'To Do' and 'Done', a 'Reschedule' dropdown menu, and a vertical list of alarm options: 'Alarm', 'Five', 'Ten', 'Fifteen', 'Thirty', '1h', and '2h'. A large 'Comment' text area is on the left side. At the bottom, there are 'OK' and 'Cancel' buttons.

It is represented like:

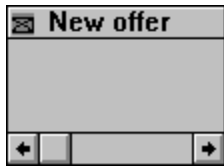


And will define a meeting from 8 to 10 of the 12 of January.

Creating a To Do: standard way.

It is just identical to create any other kind of record in FC. It just must be remembered to check the To Do button.

A To Do's It is represented like:



And will remember you that the 12 of January you must send the letter containing the new prices to Acme Inc.

Note as being the priority missing the entry is in light gray.

View your appointments.

It is very important to have always clear your agenda situation; for that FC provides different levels of view over the appointments:

[The daily view](#)

[The weekly view](#)

[The monthly view](#)

[The Monthly Planner](#)

[The Yearly Planner](#)

FC knows that sometime is also necessary to review what you have done (or what you have to do) for a particular customer or for a particular Sales Oppy or for a Contact. If you click on the upper right corner of a window you will see the list of all the various appointments for this window.

Creating an appointment: advanced ways

There are other ways to create an appointment:

You may create an appointment that does not pertain to any group

- A) position your mouse over the hourly calendar of any agenda view
- B) Click the left mouse button
- C) Drag the mouse to another position inside the hourly calendar
- D) Release the left mouse button

A partially filled appointment window appears.

To create an appointment for a group:

- A) Drag the group father in the hourly calendar of any agenda view
- B) Fill the appointment window that appears.

Creating a To Do: advanced way

To create a To Do for a group:

A) Drag the group father in the To Do's list of any agenda view

B) Fill the appointment window that appears.

Or fill the small edit text at the top of the to do list to create a dayless to do.

an appointment

An appointment may be modified in various ways:

- A) Select and open the appointment window from child father or main list and modify it.
- B) Double Click with the mouse over an appointment in the hourly calendar or press CR over the current appointment (the one in Dark Gray),
- C) Double click with the mouse over a To Do or press CR over the current To Do (the one in Dark Gray),
- E) Modify starting-ending time of an appointment:
with the mouse: position the mouse over the upper/lower border of the appointment (the cursor becomes a cross) then move the mouse up-down or capture the appointment with the mouse, then move the mouse to move the full appointment.
with the keyboard: select an appointment then use:
up-down arrow to move the appointment
CTRL up-down arrow to decrease the appointment
SHIFT up-down arrow to increase the appointment.

an appointment:

An appointment may be delete in various way:

- A) Standard way: as customary select it in the main, child or archive list and press DEL or drag it in the wastebasket.
- B) From the hourly calendar: select it (it becomes dark Gray) and drag it to the wastebasket or press delete
- C) from the To do List: select it (it becomes Dark Gray) and drag it to the wastebasket or press delete.
- D) form the menu: you may delete all the appointments before a certain time to clean up the agenda: see [Agenda Clean Up](#)

repetitive appointments.

Some appointments (To Do's) are repetitive in nature. For example a birthday is every Year at the same date, the quarterly report is FC allows to define repetitive Appointments (To Do's). Is enough to select in the Reschedule Combo Box how often

Alarms

Appointments (not To Do) may generate alarms on your computer screen. It is enough to select how much before the starting of the appointment you want to be remembered; a window will appear showing the appointment that is coming.

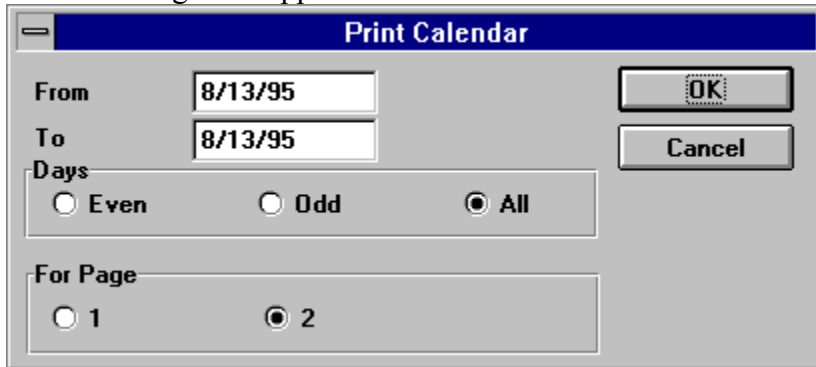
The Agenda reports

There are 5 kind of agenda reports:

Daily

It is possible to print a daily report for more than one day when. Select the **Agenda / Reports / Daily** report menu item.

The following form appears:

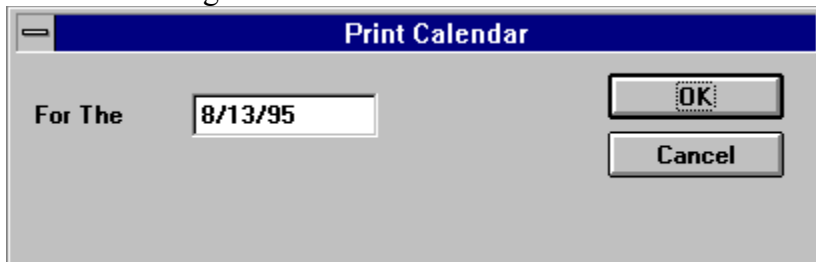


The screenshot shows a dialog box titled "Print Calendar". It has a blue header bar with a minus sign icon on the left. Below the header, there are two text input fields: "From" and "To", both containing the date "8/13/95". To the right of these fields are two buttons: "OK" and "Cancel". Below the date fields is a section labeled "Days" with three radio button options: "Even", "Odd", and "All". The "All" option is selected. Below this is a section labeled "For Page" with two radio button options: "1" and "2". The "2" option is selected.

for page 1 print in portrait 2 print landscape two days for page

Weekly

To print a weekly report select the Select the **Agenda / Reports / Weekly** report menu item. To the following form

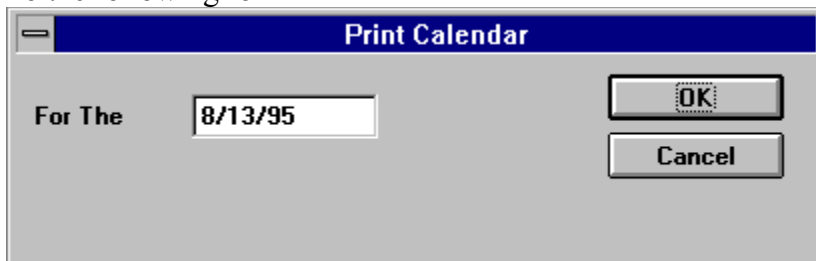


The screenshot shows a dialog box titled "Print Calendar". It has a blue header bar with a minus sign icon on the left. Below the header, there is a text input field labeled "For The" containing the date "8/13/95". To the right of this field are two buttons: "OK" and "Cancel".

Insert one of the day inside the week that you want to print.

Monthly

To print a monthly report select the Select the **Agenda / Reports / monthly** report menu item. To the following form



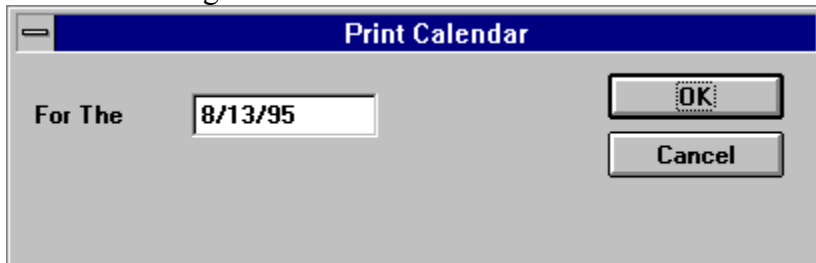
The screenshot shows a dialog box titled "Print Calendar". It has a blue header bar with a minus sign icon on the left. Below the header, there is a text input field labeled "For The" containing the date "8/13/95". To the right of this field are two buttons: "OK" and "Cancel".

Insert one of the day of the month you want to print.

Monthly Planner

To print a monthly report select the Select the **Agenda / Reports / monthly Planner** report menu item.

To the following form



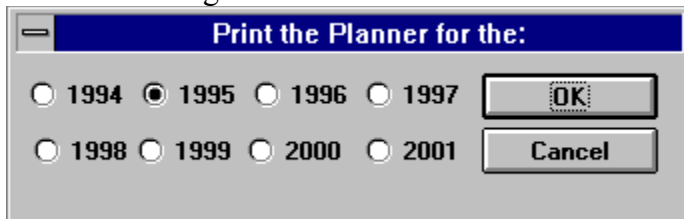
The screenshot shows a dialog box titled "Print Calendar". It has a blue header bar with the title. Below the header, there is a label "For The" followed by a text input field containing the date "8/13/95". To the right of the input field are two buttons: "OK" and "Cancel".

Insert one of the day of the month you want to print.

Planner

To print a Yearly Planner report select the Select the **Agenda / Reports / Yearly Planner** report menu item.

To the following form



The screenshot shows a dialog box titled "Print the Planner for the:". It has a blue header bar with the title. Below the header, there are two rows of radio buttons. The first row contains radio buttons for the years 1994, 1995 (which is selected), 1996, and 1997. The second row contains radio buttons for the years 1998, 1999, 2000, and 2001. To the right of the radio buttons are two buttons: "OK" and "Cancel".

Select the Year you want to print.

It is also possible to print a report for the current hourly calendar; **how?**

Highlight an item of the day you want to print;

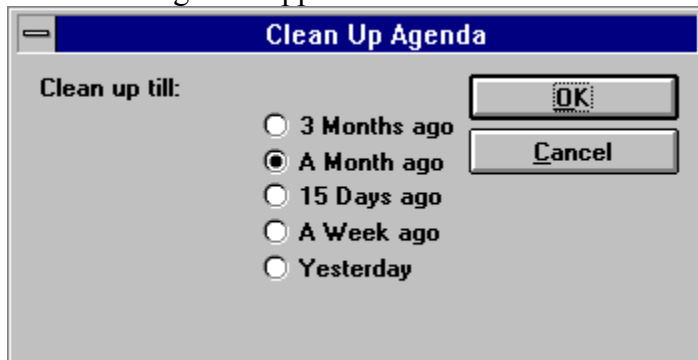
Press the *PRINT-SCREEN* key.

Clean Up The agenda.

After working a lot the agenda file will become huge. To improve system performances it is better to clean it up.

A function, especially dedicated to this clean up, may be recalled using the **Agenda / Clean Up** menu item.

The following form appears:

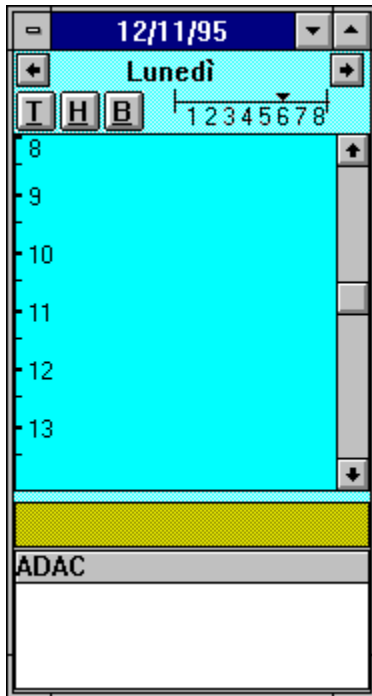


The image shows a dialog box titled "Clean Up Agenda". It has a blue title bar with a minus sign on the left. The main area is light gray and contains the text "Clean up till:" followed by five radio button options: "3 Months ago", "A Month ago" (which is selected), "15 Days ago", "A Week ago", and "Yesterday". To the right of these options are two buttons: "OK" and "Cancel".

Select how many day you want to keep and press O.K..

We advise you to print the Agenda for the days you are cleaning.

The Daily View.




The daily calendar view shows the appointments and To Do's on the current day and the dateless To do. You may, using the arrows at the top, show the next or the previous day. The daily calendar is divided in 2 areas: the to do list; the hourly calendar. If you just want to see the hourly calendar press the H button at the top of the system; if you want to see just the To Do list press the T labelled button at the top of the calendar; to show both press the B button.


The Weekly View.

From the main menu window it is possible to invoke the calendar weekly view.

A) Using the **Agenda / Weekly** menu item

It shows hourly calendars and To Do list for 5 days.

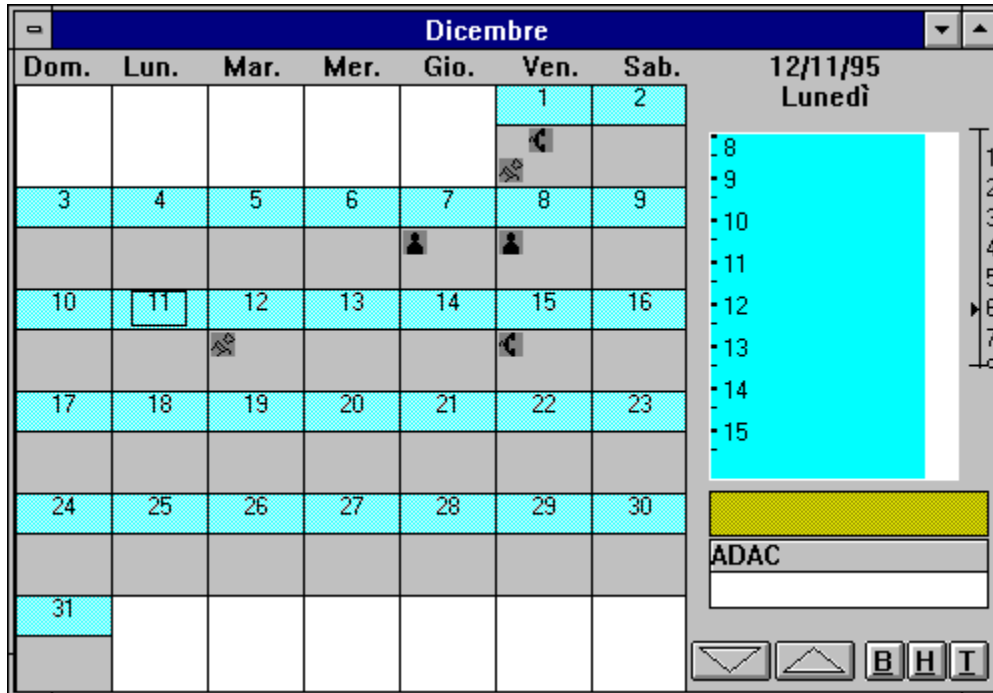
To show the previous / next day on the list use the  buttons

To show the previous / next 5 days use the  buttons.

The Monthly View.

From the main menu window it is possible to invoke the monthly view using the **Agenda / Monthly** menu item or a tool bar icon.

The monthly view:



At the left of the window the days of the month, at the right a daily calendar; the daily calendar is relative to the selected day in the monthly calendar.

To select another day in the monthly calendar click over it or use *left, down, Up, right arrows or TAB, SHIFT TAB*.

To change month use the *PAGE DOWN, PAGE UP* keys or select in the combo box at the bottom of the screen the month you want and then press the little button at the right of the combo.

DDE Integration

DDE integration allows to paste through a DDE link your Full Contact data to other applications. DDE connections are, in the Full Contact world, to paste data to a Word Processor (for mail merging) or to a Spreadsheet (for calculations).

Full Contact protocol is pretty simple:

Application Name : FullContact.

Item Name:

Selected:

Topic Name one of the fields of the currently selected record
the selected command sends to the client application the Topic field content.
To obtain the list of the available fields use the ListSelected Command

Next

Topic Name: none.

The Next command move the selected record to the next item in the main list

Previous

Topic Name: none.

The Previous command move the selected record to the previous item in the main list

ListSelected

Topic Name: none.

The ListSelected command list the data fields contained in the current item in the main list

Backup / Restore

Two types of Backup are available: Total and Incremental

We suggest you to: do a total backup every 1-2 weeks ; do an Incremental backup Daily.
Keep safely stored at least two backups.

To backup your data:

- 1) Select the **Utilities / Backup / Total** or Incremental
- 2) Give the Backup file name
- 3) Change diskette when required.
- 4) Clearly Label the diskettes

Please be sure to have an adequate number of formatted floppy disks available.

NOTE: the backup utilities compress the information; normally 1-2 diskettes are enough.

The backup utility will backup also the external documents inserted in the FC environment.

Restore

If you lose your data you must restore them from the Backup file.

To restore your data:

TOTAL RESTORE

- 1) Select **Utilities / Restore / Total**
- 2) Select the last Total Backup file.
- 3) Change diskette when required.

When the Total Restore is completed start the Incremental restores.

- 1) Select **Utilities / Restore / Incremental**
- 2) Select the first Incremental Backup file.
- 3) Change diskette when required.

Repeat pass 1,2,3 for each incremental backup file. Be sure to respect production order.

Export/Import the data

FC provides an Import / Export utility; the data are Exported to (Imported from) a Comma Delimited file. A comma delimited file is a kind of file normally used to communicate info between various systems.

Export the Data

- 1) Select the Data File you want to export the data for.
- 2) Select (using the selection module) the records you want to export.
- 3) Select the **Utility / Export** option
- 4) Select the delimiter
- 5) Give a data name

At this point you may choose the fields you want to export.

Import the data

To import data from a delimited file you must:

- 1) Select the **Utility / Import** option
- 2) Select the file you want to import from.
- 3) Select in the combo Box witch kind of FC data file you want to fill.
- 4) In the window arrange the data field according to the format of thge input file. Note that you may D&D a field to a new position.

Password Management

To ensure data privacy a password protection mechanism is provided in Full Contact.

NOTE: Full Contact data are written in DBIV and are NOT encrypted. Using an external tool (like DBIV) is always possible to read Your Data.

Username and Password are selected at installation Time; if the password is forgotten it may be changed using the installation diskette.

Username and password may be changed using the **Change Username** and **Change Password** options of the **Customization** menu.

If the **Set Password** menu item of the **Customization** menu is checked the password will be asked at login.

Environment Clean Up.

Deleted data are kept in a temporary storage area in FC. With time this storage area may become overcrowded and, as a consequence, the system performances may decrease.

When You perceive a degradation of system performances the deleted documents area may be clean up using the **Clean up** option of the **Utilities** menu.

Create a personalized letter

Only Note and external documents of the Windows Write type may be personalized letters.

To create a personalized letter:

- A) Open the Write external Document or the Note
- B) Open the **Fields Select** window from the main menu using the **Utilities / Field Select** option.

The following dialog appears:



when you double click on an item it is inserted in your Document.
p.e. @contact->Last Name@

Repeat steps A and B till you finish.

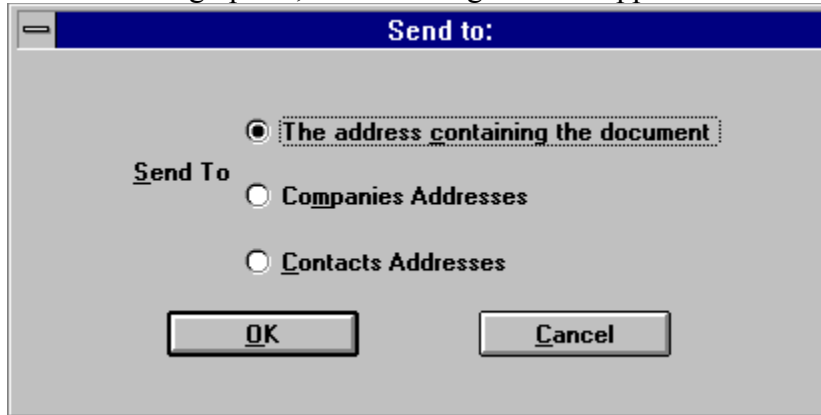
Create the Mail Merging Mailing list

There are two possible way to create a mailing list:

- A) Extract all the customer / Contacts in which the document to be sent is contained.
- B) Select in the main list the person to which you want to send the letter.

In any case you must:

- 1) Open the note or the external Write document you want to print/fax.
- 2) Select mass Mailing option; the following window appears:



Select the appropriate option and the OK

3) If you want to Select in the main list the person to which you want to send the letter use the Selection module else continue.

4) Select OK

The **To Send** window appears

5) Select Ok in the **To Send** window or add to it new contacts (customers) dropping them from the main list or delete unwanted contacts.

To move between the items of the **To Send** window use up-down arrow.

To delete an item use the DEL key or drag the item in the wastebasket.

To view an Item press RET or double click.

To Add an item drag it from the main list.

Select the mailing list to print labels

1) Select in the main list the person for which you want to print the labels.

2) Select Utilities /Labels

The **To Send** window appears

3) Select Ok in the **To Send** window or add to it new contacts (customers) dropping them from the main list or delete unwanted contacts.

To move between the items of the **To Send** window use up-down arrow.

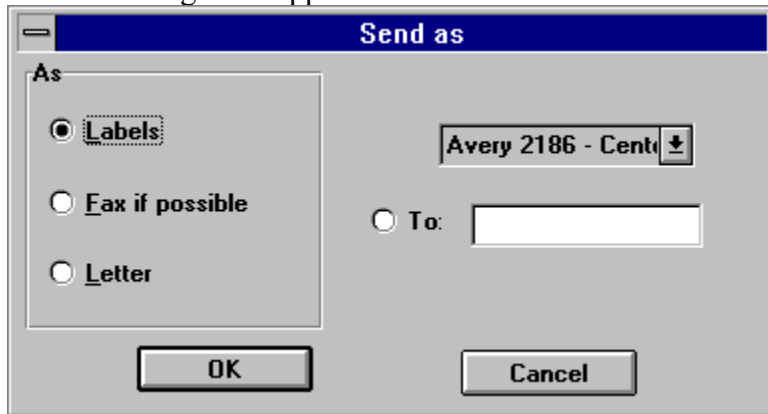
To delete an item use the DEL key or drag the item in the wastebasket.

To view an Item press RET or double click.

To Add an item drag it from the main list.

Send/Fax The Letter

To send a letter you must make some decision: first you must decide if you want to Print the personalized letter or if you want to Fax it (Fax it is possible only if Delrina WinFax is installed). The Following form appears:



The image shows a dialog box titled "Send as". It has a blue title bar with a minus sign on the left. The main area is light gray. On the left, under the heading "As", there are three radio buttons: "Labels:" (selected), "Fax if possible", and "Letter". To the right of these is a dropdown menu showing "Avery 2186 - Cent" with a downward arrow. Below the dropdown is a radio button labeled "To:" followed by an empty text input field. At the bottom of the dialog are two buttons: "OK" and "Cancel".

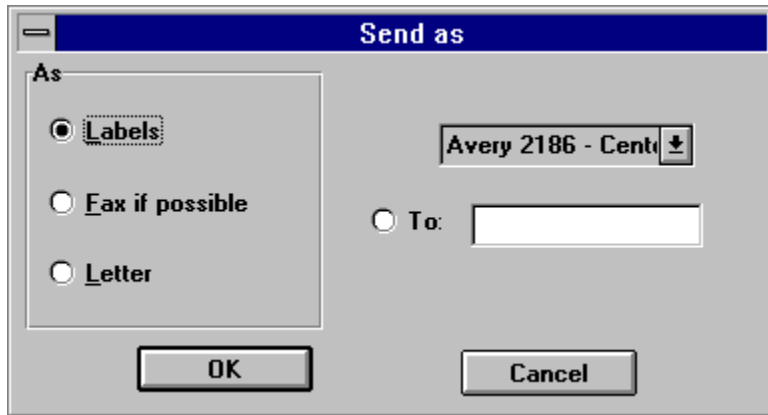
In this form you must select what you want to do:

Print

Fax

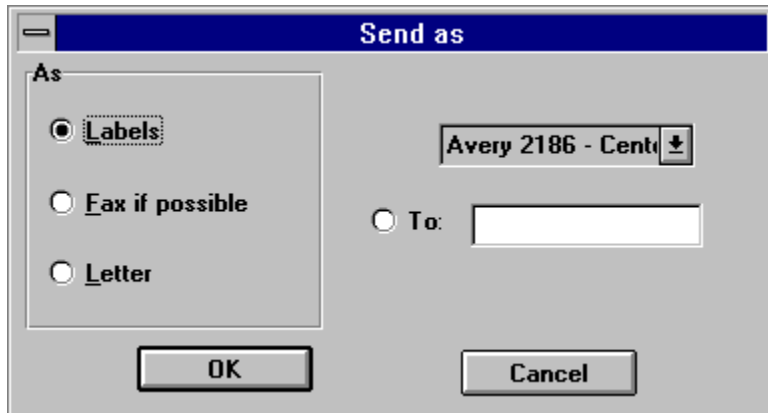
Print Labels-Envelopes

Print a Letter



On the top the details of the current selected printer; using the **Change** button you may change the current printer Setup; using the **New** button you may change e printer. Press OK to print.

Print Labels

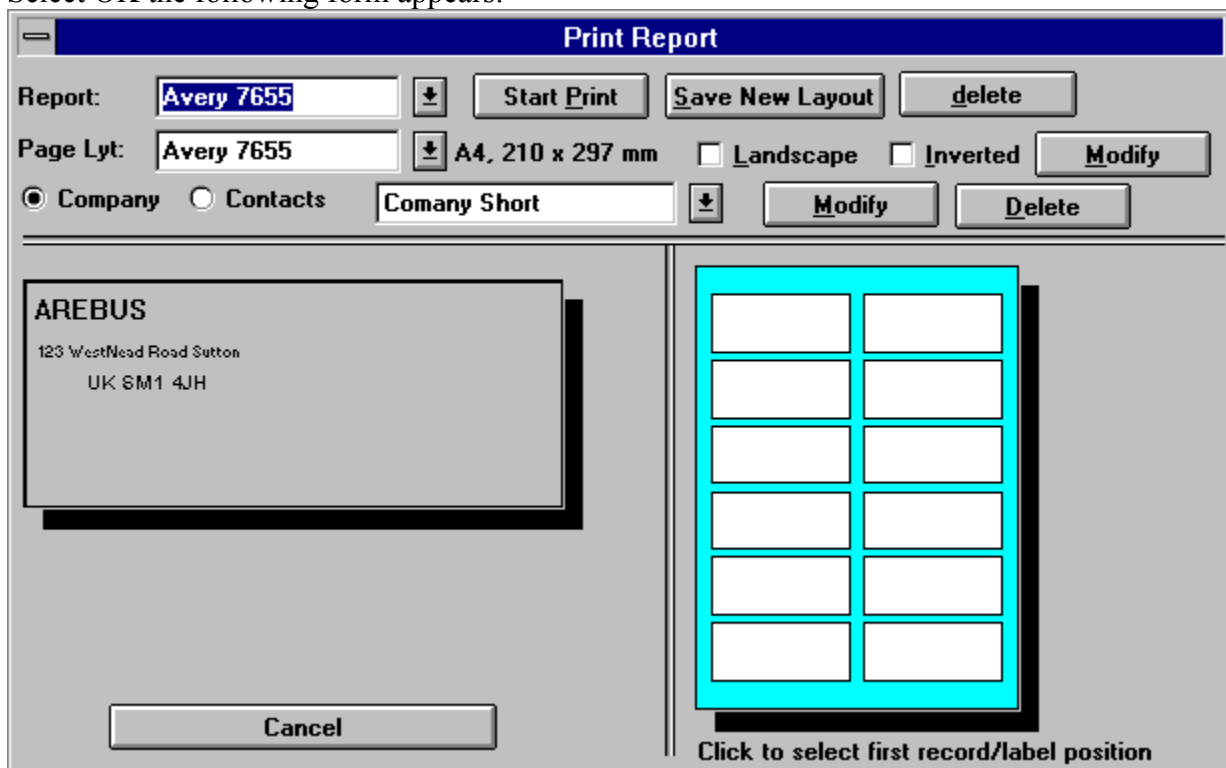


The 'Send as' dialog box has a title bar with a minus sign and the text 'Send as'. It contains three radio buttons under the heading 'As': 'Labels' (selected), 'Fax if possible', and 'Letter'. To the right, there is a dropdown menu showing 'Avery 2186 - Cent...' and a 'To:' label next to an empty text input field. At the bottom are 'OK' and 'Cancel' buttons.

Select the label/envelope template You want to use.

If you want, in the labels for companies, to add a To: ... line to the address select the to button and insert the to text.

Select OK the following form appears:



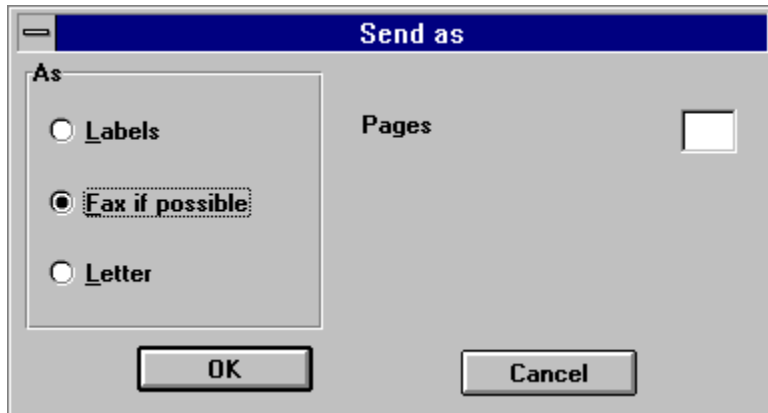
The 'Print Report' dialog box has a title bar with a minus sign and the text 'Print Report'. It features several controls: 'Report:' dropdown with 'Avery 7655', 'Start Print', 'Save New Layout', and 'delete' buttons; 'Page Lyt:' dropdown with 'Avery 7655', 'A4, 210 x 297 mm', 'Landscape', 'Inverted', and 'Modify' buttons; and radio buttons for 'Company' (selected) and 'Contacts', with a 'Comany Short' dropdown, 'Modify', and 'Delete' buttons. A preview area on the left shows a label for 'AREBUS' with address '123 WestMead Road Sutton, UK SM1 4JH'. A cyan grid on the right represents the page layout, with a 'Click to select first record/label position' instruction below it. A 'Cancel' button is at the bottom left.

In this form you can select new label templates or define new label templates.

If you want to start printing from the nth label in the page just click over it on the page representation.

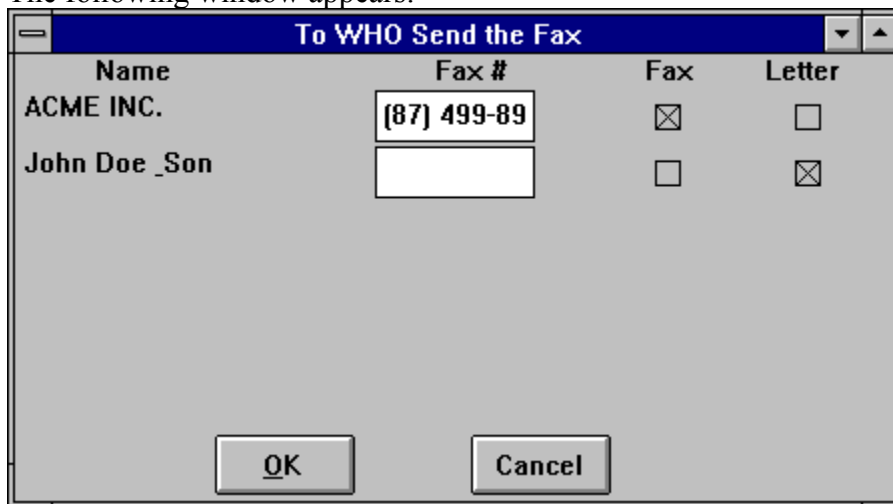
See also: [Modify the page layout](#) [Modify the report layout](#)

Fax a Letter



The "Send as" dialog box has a title bar with a minus sign and the text "Send as". Below the title bar is a group box labeled "As" containing three radio buttons: "Labels", "Fax if possible" (which is selected), and "Letter". To the right of the "As" group box is a label "Pages" followed by an empty text input field. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Insert the Number of pages of the FAX. Then Press OK.
The following window appears:



The "To WHO Send the Fax" dialog box has a title bar with a minus sign, the text "To WHO Send the Fax", and up/down arrow buttons. Below the title bar is a table with four columns: "Name", "Fax #", "Fax", and "Letter".

Name	Fax #	Fax	Letter
ACME INC.	[87] 499-89	<input checked="" type="checkbox"/>	<input type="checkbox"/>
John Doe_Son		<input type="checkbox"/>	<input checked="" type="checkbox"/>

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Full Contact try to fill the window with the Contact (Customer) Fax numbers (if there is more than one Fax number a combo Box is displayed).
If the Customer (Contact) does not have a Fax number FC allows you to insert your own number or alternatively to print the letter.

Dialing using Hot Keys

When you are:

- A) editing a form that contain Telephone numbers
- B) on a list item that contain Telephone numbers
- C) on a calendar number which father that contain Telephone numbers

You may dial the telephone number.

Jus press F7 and FC automatically build your telephone number, taking in account Your localisation information, and Dial it.

Note that to change the localisation information you need to press F8; to set up the modem parameters use F6.

To modify the Localization informations You may also use the File / Preferences menu option.

To **Hang - Up** use the F11 key or the Hang-Up menu oprion

Dialing from the Desktop

If you select the telephone option (or drag an element in the telephone or click the telephone button) FC presents you with the list of tel # contained in the currently selected document.

When You select one the system build your telephone number, taking in account Your localisation information, and Dial it.

The system also open a note for the contact/company you are dialing. You may either cancel this note or fill and save it.

Localisation Info

The localisation info dialogue is called or using the F8 from any telephone field or using the File / Preferences menu option and clicking the Localisation button.

The screenshot shows a window titled "Set Localization Params" with a blue title bar. Below the title bar are several tabs: "Miscellaneous", "Wallpapers", "Windows Col.", "Desktop Col.", "Login", "Modem", "Localization", "Agenda", "Personal Info", "At Start Up", "Summaries", and "Enable". The "Localization" tab is selected and highlighted. The main area of the dialog contains the following fields and options:

- My area code:** A text box containing "111".
- Internat. code:** A text box containing "00".
- Today I'm:** A group box containing three radio buttons: "1", "In Town", and "Abroad". The "Abroad" radio button is selected.
- International Prefix:** An empty text box.

At the bottom of the dialog are three buttons: "Exit", "Cancel", and "Save New Values".

In the localisation info you must insert your area and country code; the prefix that is used to dial an international number (normally is 00).

Additionally, to allow FC to correctly build Your telephone number you must, if you are using FC on a portable, insert your location; i.e. tell the system if you area at home, travelling in your country but in a different area code, abroad.

If your tel # is 677-4533 and you are 'at home' when you dial FC dials 677-4533 if you are travelling FC dial (676) 677-4533 (supposing that 676 is Your area code); when you are abroad 0016766774533.

Modem Setup

The localisation info dialogue is called or using the F8 from any telephone field or using the File / Preferences menu option and clicking the Modem button.

Invoke this menu option to set up the modem parameters, please refer to Your modem manual for the correct setup.

ShareWare

Most money back guarantees work like this: You pay for the product and then have some period of time to try it out and see whether or not you like it. If you don't like it or find that it doesn't do what you need, you return it (undamaged) and at some point - which might take months - you get your money back. Some software companies won't even let you try their product! In order to qualify for a refund, the diskette envelope must have an unbroken seal. With these "licensing" agreements, you only qualify for your money back if you haven't tried the product.

How absurd!

Shareware is very different. With shareware you get to use it for a limited time, without spending a penny. You are able to use the software on your own system(s), in your own special work environment, with no sales people looking over your shoulder. If you decide not to continue using it, you throw it away and forget all about it. No paperwork, phone calls, or correspondence to waste your valuable time.

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Please show your support for shareware by registering those programs you actually use and by passing them on to others.

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New Area

Creates a new area.

Select Area

Allows You to select a new area in which to work.

Delete Area

Delete the current area.

Note: only empty areas may be deleted.

All Areas

Allows to operate on all areas at the same time; particularly useful if you do not remember in which area you inserted an information.

Note: documents created in this 'area' are viewable by all the other areas. P.e. if you update a table here the new value will be available to any area.

Exit

Exits from Full Contact.

File

This menu item contains global operation that influence the whole system.

Open

Open a document type.

Note: when you open a document type depending on the setting of the All by Default flag all the documents in the selected type may be shown. If You have thousand of document this may take many seconds.

Kind Of Appointments Table

This table fills the appointment document Type Combo box .

Note that checking the 'Important' radio button the new type inserted in the table will be represented by a ! icon in the hourly calendar; if the 'important' radio button it is not checked the new type is represented with a ?.

Title Table

This table fills the contact document Title Combo box .

Method. Of Payment Table

This table fills the expense document Method Combo box.

Growth Potential Table

This table fills the company document Growth Pot. Combo box.

Status Table

This table fills the sales Opportunity document Status Combo box.

Classification Table

This table fills the Contact document Classification Combo box.

Category Table

This table fills the Expense document Category Combo box.

Ind. Class Title

This table fills the Company document Industry Classification Combo box.

Deleted

When you delete a document the document is kept in a temporary storage area till you decide to Clean Up the environment.

When this menu option is selected the list of deleted items for the selected document type (i.e. if note is the open type the deleted notes) is shown. To restore an element select it and then press the INS key or select Restore from the Document menu.

Documents

Functions related to the document management.

New

Creates a new document of the selected kind.

Delete

Deletes the currently selected document. If the document is in the child list the document may either be removed from the current group or deleted.

Next

Selects the next document of the current list

Previous

Selects the previous document of the current list

All

Loads in the main list ALL the elements contained in the open data file.

Copy

Copies a document, and its whole folder, to another area.

Add Document

Selecting one of the options of this menu a new document is added in the folder of the currently selected document.

Calculate Reports

Calculates a report for the items currently displayed in the main list

Un-Delete

When the deleted list is displayed restores the currently selected document

Customise

Options in this menu allows to customise the environment

All By Default

If this option is checked when you open a document type all the documents contained in the data file are inserted in the main list.

About
About dialogue.

Open

Opens a Document type

Table

The following tables are available on the system:

Kind Of Appointments

Title

Method. Of Payment

Growth Potential

Status

Classification

Category

Ind. Class

Fields Select

Opens a window from which with a double click you may select a field to be inserted in a personalised letter.

The image shows a vertical dialog box titled "Select". It is organized into four sections, each with a list of fields and a vertical scrollbar on the right side of the list. The sections are:

- Customer**: Name (abbr.), Name, Ind. Class., #, Street
- Contact**: Title, First name, M.I., Last name, Category
- Person.**: &Title, First name, Mid. In, Last name, Tel #
- Other**: Date, Time, Subject

At the bottom of the dialog box is a button labeled "Close".

Keyboard and Hot Keys

Date: F8 today date; F9 today date in long format; F2 monthly calendar; W this Wednesday; 9 the ninth of this month; F 4 February the forth.

Telephone: F4 list of country codes; F5 list of area codes; F6 modem setup; F8 location setup; F7 dials the number

Edit fields: F8 inserts today date, F9 today date in long format

Comment field : ALT-M (Alt-Maximize) enlarges the field; ALT-M (Alt-Minimise) again reduces the field.

List : F12 moves the selected record to the main list, DEL deletes the selected record; CR opens selected record, TAB moves between the lists; F7 dials the number.

Calendar: Up-Down arrows to move an appointment, CTRL or SHIFT up-down arrows to size it; F12 moves the selected record to the main list; RET opens the selected appointment; TAB moves between lists; F7 dials the number of father (if any); DEL deletes the appointment; M moves the entry to another day.

Deleted record list: Ins restores selected record

Mouse

Mouse use in FC is pretty extensive.

FC fully uses Drag & Drop technology.

As a short summary of the various possibilities.

A document in a list is dragged: in the wastebasket: **is deleted**; in the hourly calendar: **an agenda item is created**; in the select icon: **the list is reduced**; in another document in a list is inserted: **in this other document folder**; in the to do list: **a To do is defined**; in a day of the monthly calendar: **an agenda item is created**; in the mass mailing addresses list: **a new addresses is added to the list**

A document in a window is dragged: in another document in a list is inserted: **in this other document folder**; in the wastebasket: **is deleted**

An element of the hourly calendar is dragged: in the hourly calendar: **is moved**; in the wastebasket: **is deleted**

Note: Click with the RIGHT mouse button over an appointment to see the father list.

Help On Help

Invokes the standard window help file on how to use help.

Delete from Child or father windows

When You delete a document from a child or a father window the FC has two options:

A) Delete the document

B) Remove the document from the current group, without deleting it.

FC displays a dialogue were you may select the correct option.

Next Day

Display the Next Day.

Previous Day

Display the Previous Day.

Number of hours

Augment-Reduce the number of hours shown in the hourly calendar.

The To do's list

The to do's list includes all the To do's for the day.

To delete a to do press the DEL key or drag it to the WasteBasket.

Create a To do: standard way Topic0037 , Advanced way Topic0040

Curtesy Action

Selecting one of this combo box items inserts in the agenda a note remembering the action.
P.e. if you select x XMas : Telephone an agenda item for the 12th of december: telephone is inserted in the agenda.

if you select x Birthday: Gift A category an agenda item for the birthday date with subject Send an A category gift is inserted in the agenda.

Due Date

If you insert a date in this field an agenda item, remembering the due, is inserted in the agenda.

Date Control

With F2 displays a monthly calendar.

With F8 today date.

The control is 'intelligent' i.e. understand W as this Wednesday; 9 as the ninth of this month; F 4 as February the forth.

Telephone Control

F4 list of country codes;

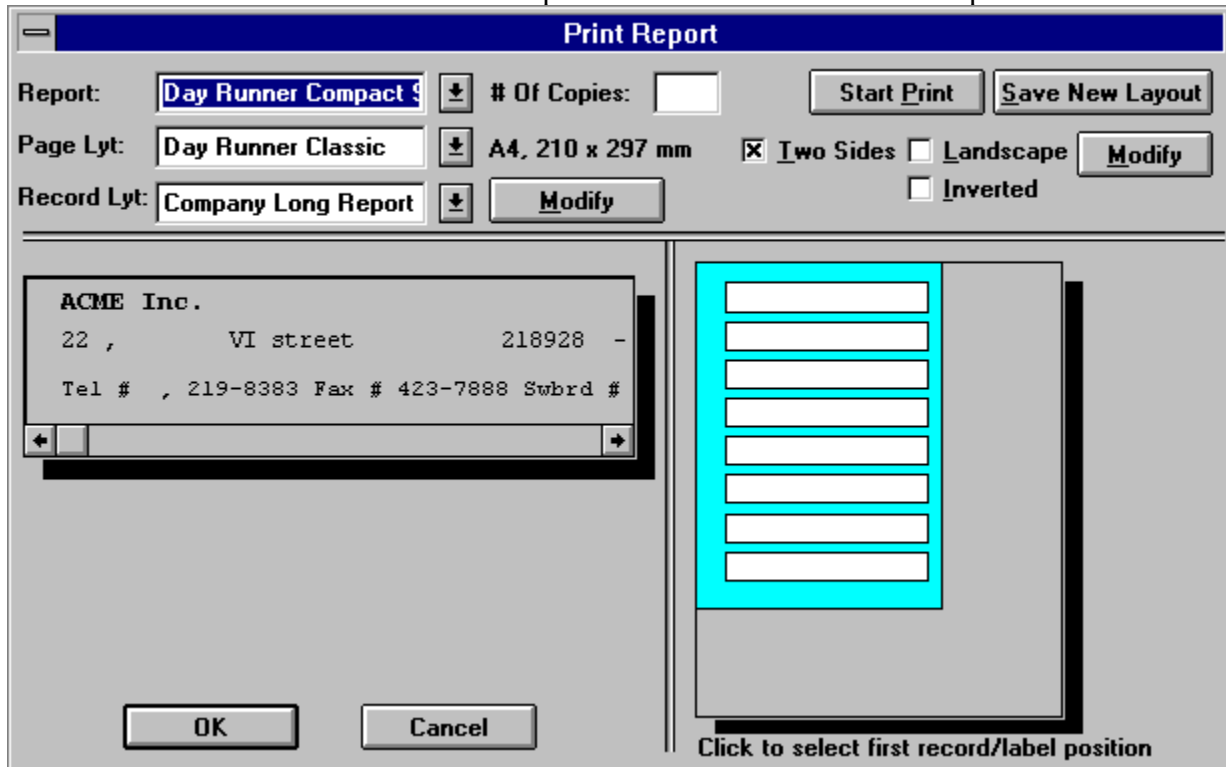
F5 list of area codes;

F6 modem setup;

F8 location setup;

F7 dial the number

The current version 3.0 of Full Contact provides an ad hoc WISIWYG report writer.



The report writer is logically divided in two parts:

- a) creation of the record / page layout using the Page Layout editor
- b) editing of the report

Note that if you click over a record in the page layout representation the printing will start from this record.

The Yearly Planner

Using FC you may 'plan' all Your year, You may insert your holidays, when you will be dedicated to project A or B, ecc.. .

The color You assign to a day in the planner will became the background color of the daily calendar.

To create the Planner:

Open the Yearly planner using the option: Calendar/Planner

The following window appears:

To change the color of a group of days:

- A) Click with the mouse on the new color You want to assign
- B) Click on the first day of the new group then, keeping the left mouse button pressed, drag the mouse to the last day then release the left mouse button.

To modify the legenda of a color:

- A) Double click on a legenda
- B) Insert the new legenda
- C) Click on the little button on the right

To view the oppointments for a day

- A) Double click on the day

The Monthly Planner

The monthly planner gives a high level view of the thing you have to do during the whole month.

To define a new appointment just position the cursor over a hour an drag it to the next position.

Fill then the form.

Double clicking will show the appointment itself.

The Wallpapers

To have your calendar as a wallpaper is a big plus; permits to always have everything available at a glance.

There are 5 available Wallpapers:

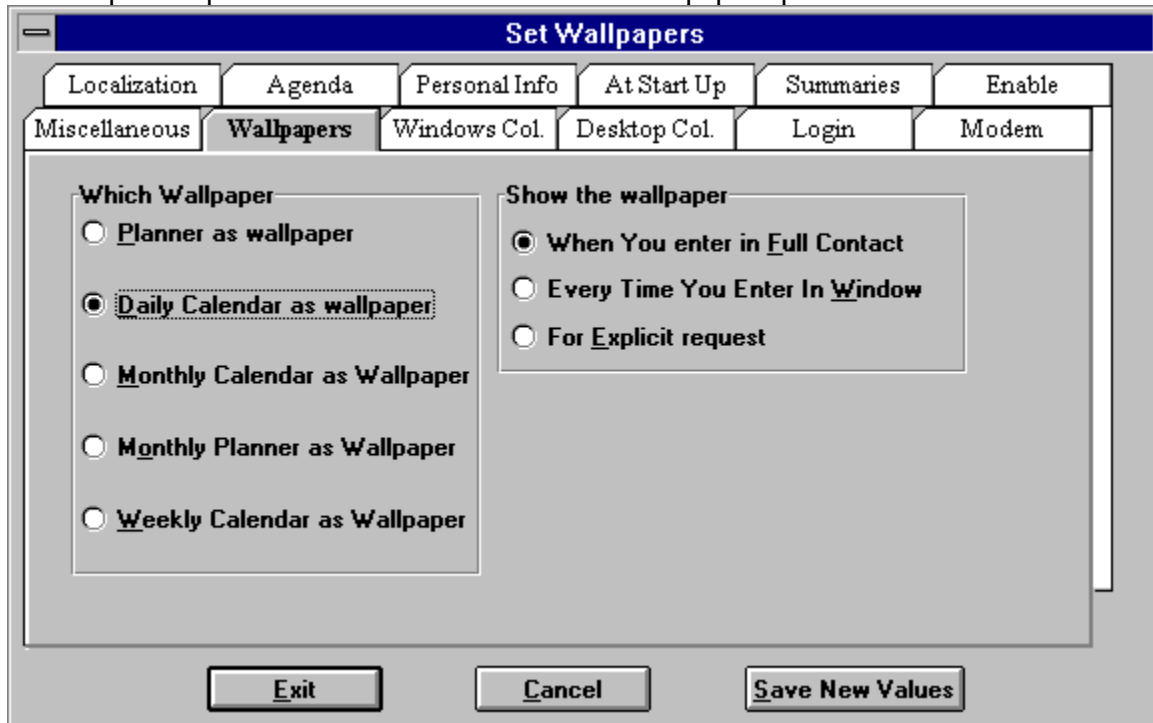
- 1) Daily View
- 2) Weekly View
- 3) Monthly
- 4) Monthly Planner
- 5) Yearly Planner

You may create a new Wallpaper explicitly (just use one of the wallpapers options in the calendar menu) or you may

order FC to :

- 1) Calculate a new Wallpaper every time you exit from FC
- 2) Set this file as wallpaper:
 - A) Every time you enter in window or..
 - B) Every time you enter in FC.

To set up these parameters use the Preferences / Wallpaper options.



Cut and paste agenda topics

You may cut and paste an agenda entry from the current day to another day;

To do that:

- 1) Select the agenda item
- 2) Press M
- 3) Fill the new date details.

User defined rescheduling options

You may define new rescheduling interval for example:

Reschedule this item every 2Months , 3 Weeks, 2 Days.

To do that just insert 2 M, 3 W , 2 D as rescheduling value.

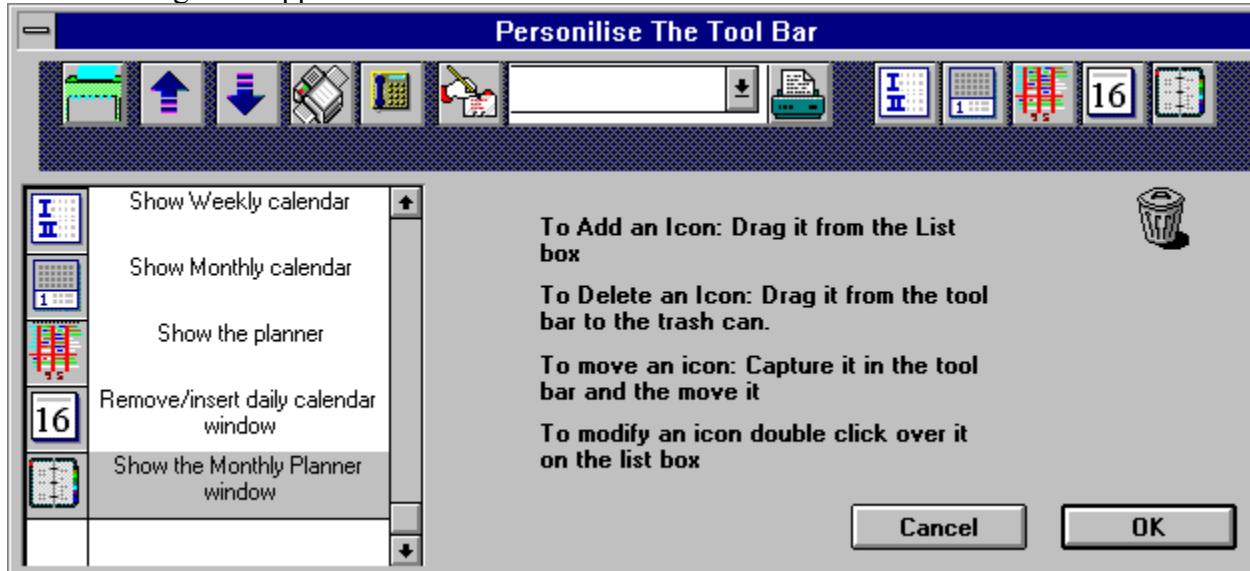
The tool bar editor

You may completely redefine Your Toll Bar.

To do that:

- 1) Use the File / Preferences menu
- 2) Select the Tool Bar Button.

The following form appears:



To Add a new icon:

Drag it from the list box to the tool bar

To Delete an icon:

Drag it from the tool bar to the wastebasket icon

To move an icon:

Drag it in the tool bar to a new position

To Modify an icon:

Double click on it the icon editor allows to modify it

NB. The changes appear only when You restart FC.

The Icon editor

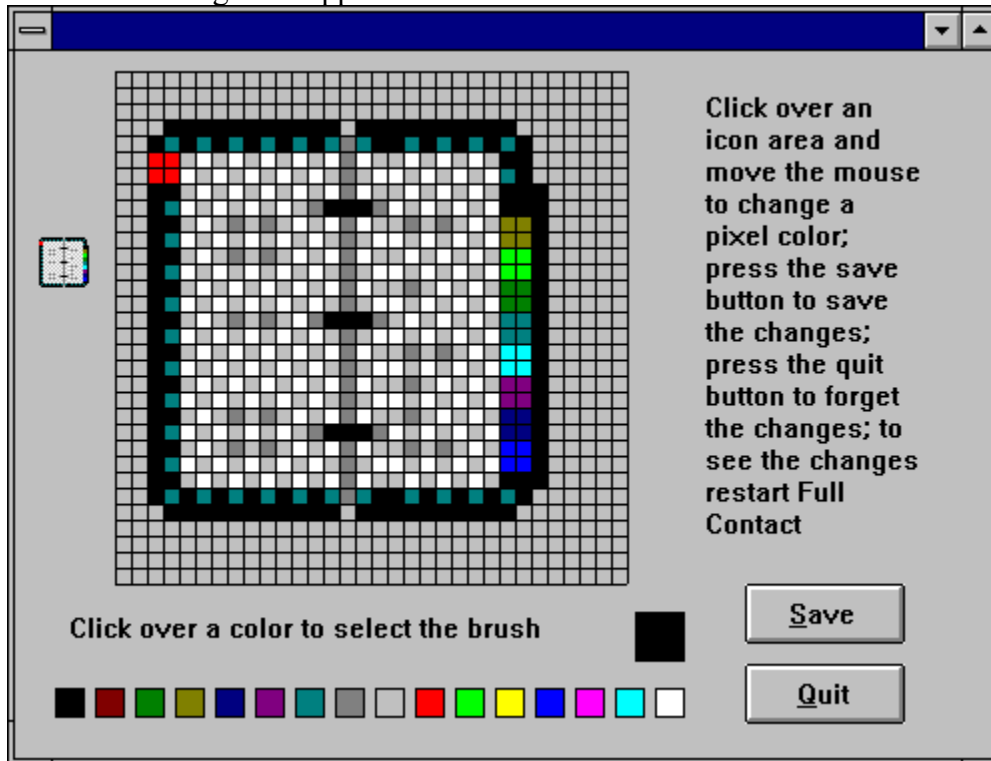
You may edit FC icons to create Your own icons;

To edit an icon:

Invoke Using File / Preference / Edit Tool Bar the tool bar editor

Double click over an icon in the list box.

The following form appears:



You may change an icon pixel clicking over one of the colors on the lower part.

The pass with the left mouse button pressed over the icon.

Select an Agenda Type

If You use an agenda together with FC it is nice to pass your data from FC to the agenda.

But different agendas have different page formats;

In FC are defined the main page formats of the time managers that are leader in the market place.

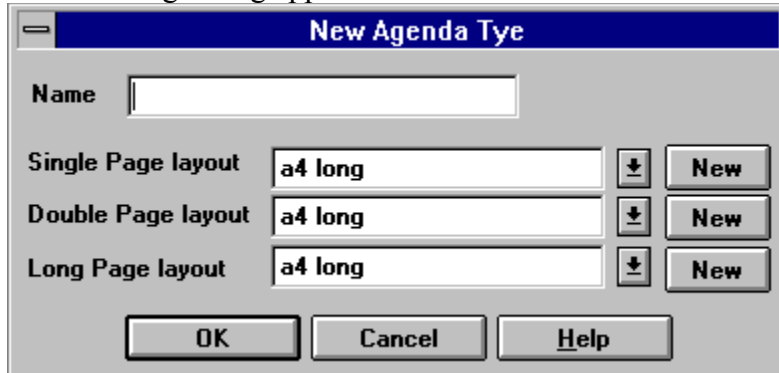
To select your agenda type use the File / Preference / Agenda option

Then from the combo box select Your agenda type.

If Your agenda type does not exist You may define a new one;

Use the new button on the select agenda dialog;

the following dialog appears:



Here You must insert 3 different type of layout and a new layout name;

The different layout will be used:

- single page to print a single page daily calendar

- double page to print a double page daily calendar

- long page to print the weekly, monthly, monthly planner and planner calendars.

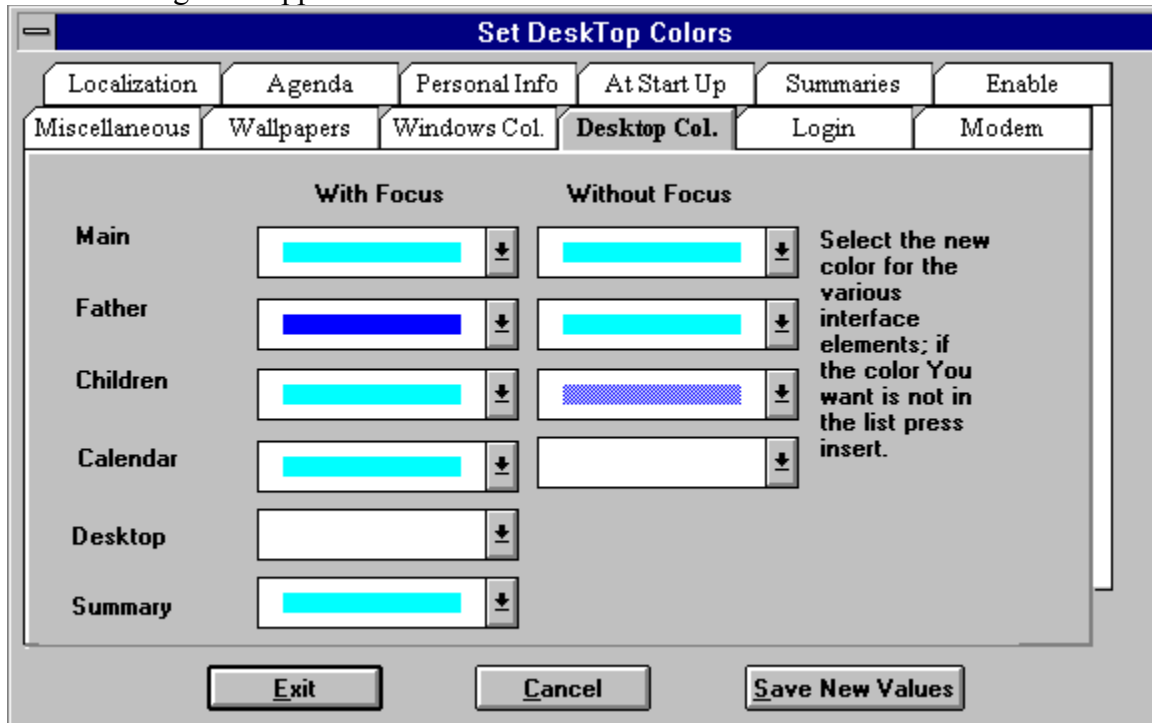
If none of the page layout predefined in FC matches Your needs press the new button; You will enter the page layout definition dialog (toModify) where you may define new page layouts.

The Desktop Colors

The colors of the: desktop, father, child and main lists, summary window and the color of the daily calendar may be changed by the user.

To do that invoke the : File / Preferences / Desktop colors option.

The following form appears:



In the list boxes select a new color; if none of the defined colors is satisfactory just press the INS key; the window color creation dialog appears; you may define there a new color.

Note as father, child, and main lists have 2 (two) combo box associated. The first is the color of the list box background when the list box does NOT have the input focus the second is the color background when the list box DOES have the input focus.

The 'Calendar' color refers to the internal gauge color of the calendar; the color of the surrounding calendar box is gathered from the Yearly planner (p.e. the weekends are in red) the color of the entries is defined from the value of the color combo box in the appointments entry.

The Windows Colors

The windows colors may be changed by the user.

To do that invoke the : File / Preferences / Windows colors option.

The following form appears:

	Background	Controls
C ustomer	[White] ↓	[Green] ↓
C ontacts	[White] ↓	[White] ↓
N otes	[White] ↓	[White] ↓
E xternal	[White] ↓	[White] ↓
A ppointm	[White] ↓	[White] ↓
E xpenses	[White] ↓	[White] ↓

Press insert over a list to add additional colors.

Exit Cancel Save New Values

In the list boxes select a new color; if none of the defined colors is satisfactory just press the INS key; the window color creation dialog appears; you may define there a new color.

Note as every windows has two combo box; the first one defines the color of the background; the second one the color of the edit fields.

Duplicate an item

To duplicate an item just use the Documents / duplicate menu option (or the duplicate icon)

The report editor

To define a new report you may use the report editor; the report editor may be reached from the report form, the label form, the summary buttons of the preferences form.

The following form appears:

The screenshot shows a window titled "Fields list" with a list of fields on the left and a record preview on the right. The record preview shows the following data:

ACME Inc.			
22 ,	VI street	218928 -	New York NY
Tel # , 219-8383 Fax # 423-7888 Swbrd # 327-29-88-98			

At the bottom of the window are four buttons: "Test Print", "Quit", "Save Changes", and "Save with Name".

To the left there is a list of the fields in the current data file on the right a representation of the record,

NB. if the record is greater than the displayed area an horizontal and a vertical scroll bar are present.

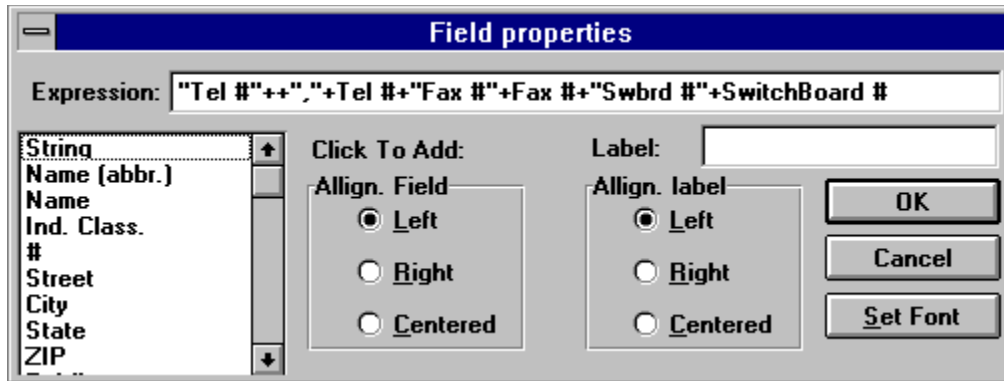
(To change the record dimensions use the page layout editor)

To add a field to the record drag it from the list box to the record.

You may the size/move the field bounding rectangle using the mouse or the arrows in conjunction with the SHIFT and the CONTROL (Ctrl) keys.

To modify a field or to create a composite field double click inside the bounding rectangle.

The following form appears:



Here you may add new fields to the field (double click on the field name); add a string (double click on the label item of the list box); select right, left or center justification of the field or of the label; change the fonts.

You may also add a Vertical or Horizontal line (you may change the size of the line double clicking over them and changing the value in the dialogue)

You may also add a string (to change the string content double click on it)

You may also add a list of child records (of various types).

Finally you may add an Bitmap to your record, for example you may define a bitmap containing your company logo and print it on the envelopes.

To assign a bitmap to a field just double click on it and select the BMP file (Note as the Bitmap is stretched in order to fill the bounding rect; you may stretch it till you obtain optimum appearance).

At the bottom of the form you have 4 buttons:

QUIT just forget the changes and quit

SAVE save the changes

SAVE WITH NAME save the new record layout with a new name

TEST PRINT print the record as a test.

WE SUGGEST TO FOLLOW THE REPORT TRAINING.

The page layout editor

There are many different layout of pages in the world; every Avery label has its own layout, every envelope its own etc..

The layout editor allows to define any kind of layout easily.

The page layout editor may be reached from the report form, the label form, the agenda select New form.

It is pretty easy to use; at the center the page representation; at the right the page details; at the left the boundaries.

Just fill the new values and see how the page representation on the center change.

Modify / Create Page Layout

Style: **A4 Standard** Landscape Invert **Save** **New**

x Page A4, 210 x 297 mm **x Printer Page**

# Rows	7	# Of Page (Vert)	1
#	2	# Of Page (Hor.)	1
Top	0.0	Top	0.0
Left	0.0	Left	0.0
Right	0.0	Right	0.0
Bottom	0.0	Bottom	0.0
Inter Row	0.0	Inter Row	0.0
Inter Column	0.0	Inter Column	0.0

Page Dimension: 203.0 x **Training** **Test** Label Dimension: 101.5 x 39.7

Reconcilate the Data Base (UpDown Load)

To align two or more data bases is very simple if you keep in mind a simple rule; You may use FC on a single computer at a time (just like a book).

The reconciliation process is divided in two parts:

Set Up of the clients (To be done once)

To Set Up a New client:

- A) Install Full Contact as client on the client system
- B) In the FC server select the enable client option (Utilities menu) giving a diskette as an output (Diskette A)
- C) In the FC server select Upgrade Client DB using Floppy (Utilities menu) WITH A NEW EMPTY FORMATTED DISKETTE (Diskette B)
- D) Bring the diskettes to the client
- E) Insert the Diskette A
- F) Select the Enable client option on the client.
- G) Insert the Diskette B
- H) Select Upgrade Client DB Using Floppy (This will take a while).
- I) You may now work on the client
- L) Select options Upgrade Server DB on the client
- M) Bring the diskette to the server
- N) Select option Upgrade Server DB on the server

Once a client has been set up you must:

- A) Work on the server
- B) When you finish to work on the server select option Upgrade Client Db - The server modification are written on the diskette
- C) Bring the diskette to the client
- D) Select Option Upgrade Client DB - The server modification are written on the client DB
- E) Work on the client
- F) Select options Upgrade Server DB on the client - The client modification are written on the diskette
- G) Bring the diskette to the server
- H) Select option Upgrade Server DB on the server - The client modification are written on the server DB

If you have more than one client you must follow the various steps for each client.

To help learning quickly Full Contact you may select the 'tips of the day' option in the preferences form.

Every time you enter FC a 'tip of the day' is shown.

The Preferences form

Preferences allows Full Contact user to completely customize their working environment; to set up various parts of the system (like for example to set up Your modem) and, finally to automate various tasks.

(To personalize forms and data base you must use the: Personalization module.)

The Preferences dialogue contains the following subforms:

Miscellaneous

Wallpapers

Windows Colors

Desktop Colors

Login

Modem

Localization

Agenda

Personal Info

At Start Up

Summaries

Register

Summaries are the little window at the bottom of the lists that contain the details of the selected records.

The summaries may be changed using the [report editor](#) in order to obtain different informations.

Just click over the button of the summary You want to change.

In this form you may insert your info

The image shows a dialog box titled "Set Personal Info" with a blue header bar. Below the header is a tabbed interface with the following tabs: Miscellaneous, Wallpapers, Windows Col., Desktop Col., Login, Modem, Localization, Agenda, Personal Info (selected), At Start Up, Summaries, and Enable. The main area contains the following fields:

- Title:
- Name:
- M.I.:
- Last Name:
- Tel #:
- Fax #:
- Firm name:
- Addr:
-

At the bottom of the dialog box are three buttons: Exit, Cancel, and Save New Values.

At Start Up - Preferences

The 'at start up' module allows to automate the opening of some forms at start up. The forms/calendars can also be tiled or ...

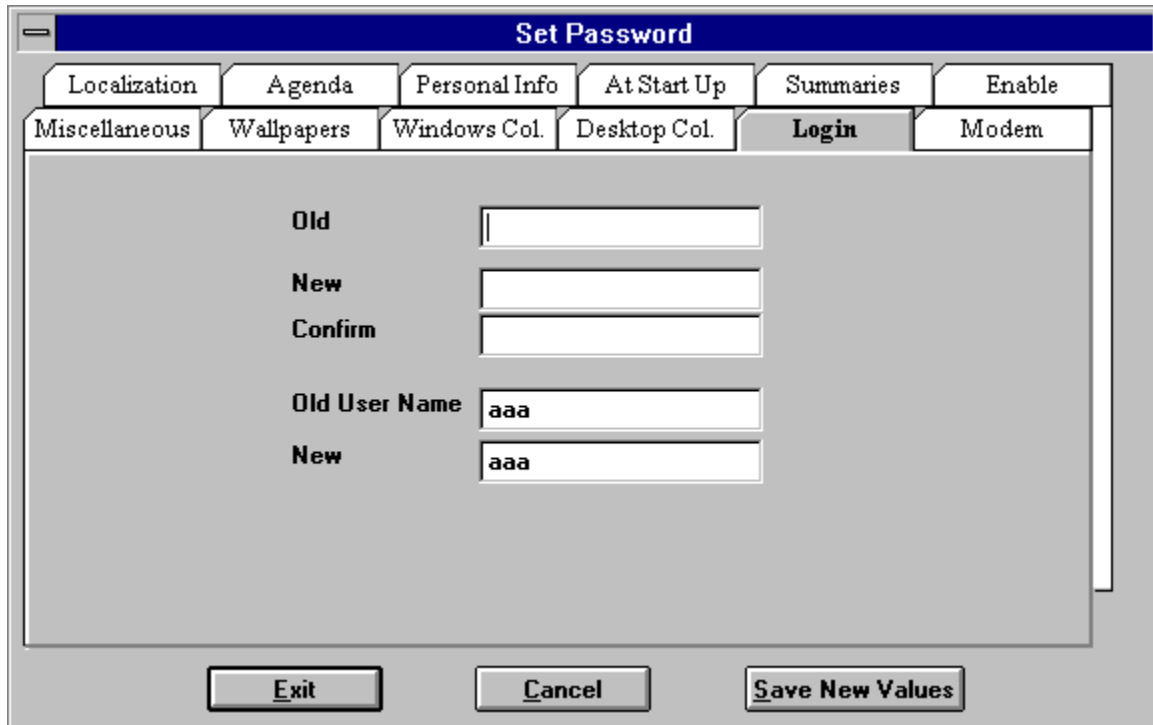
The image shows a dialog box titled "At Start Up" with a blue header bar. Below the header is a tabbed interface with the following tabs: Miscellaneous, Wallpapers, Windows Col., Desktop Col., Login, Modem, Localization, Agenda, Personal Info, **At Start Up** (selected), Summaries, and Enable. The main area contains a list of checkboxes for forms to be opened at start up:

<input checked="" type="checkbox"/> <u>D</u> aily Cal	<input checked="" type="checkbox"/> <u>C</u> ustomers
<input type="checkbox"/> <u>W</u> eekly Cal.	<input checked="" type="checkbox"/> <u>C</u> ontacts
<input type="checkbox"/> <u>M</u> onthly	<input type="checkbox"/> <u>N</u> otes
<input type="checkbox"/> <u>M</u> onthly Pl.	<input type="checkbox"/> <u>E</u> xternal Docu
<input type="checkbox"/> <u>Y</u> early	<input type="checkbox"/> <u>A</u> ppointments
	<input type="checkbox"/> <u>E</u> xpenses

At the bottom of the main area, there are three radio buttons for window management: Do Not Move, Tile, and Cascade. At the very bottom of the dialog are three buttons: **Exit**, **Cancel**, and **Save New Values**.

Login Preferences setup

The login screen allows to define a new password and to change username.

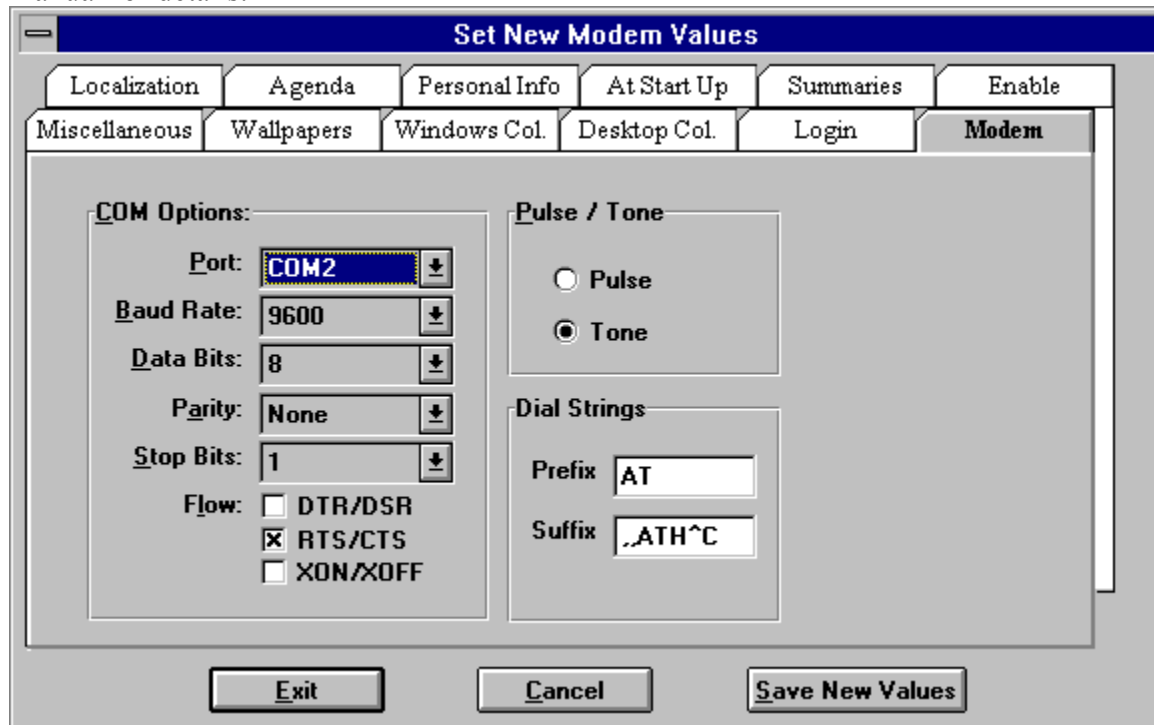


The image shows a 'Set Password' dialog box with a blue title bar. It features a tabbed interface with the following tabs: Localization, Agenda, Personal Info, At Start Up, Summaries, Enable, Miscellaneous, Wallpapers, Windows Col., Desktop Col., **Login**, and Modem. The 'Login' tab is selected. The main area contains the following fields:

Old	<input type="text"/>
New	<input type="text"/>
Confirm	<input type="text"/>
Old User Name	<input type="text" value="aaa"/>
New	<input type="text" value="aaa"/>

At the bottom, there are three buttons: **Exit**, **Cancel**, and **Save New Values**.

The Modem dialog allows to set up Your modem parameters, please refer to your modem manual for details.



Miscellaneous Subform

The miscellaneous subform allows to:



Edit the Tool Bar

Set the tool Bar position

Insert / remove the login dialog

Insert / remove the tips of the day dialog

Set all by default; i.e. inform FC that all the documents in an area must be showed in a list when the list is opened

Inform FC that the modem is installed

Hang Up

When you finish a telephone call you need to Hang Up the phone.

You may select the Hang Up option on the document menu or just press F11.

