GroupEase CardData Help

GroupEase CardData allows users to file information in the form of business cards or contacts either privately on the local desktop or publicly on the file server.   This information can then be easily retrieved using CardData scroll or search functionality.   Users can also print single cards, groups of cards or all cards.   Note that pressing the F1 key will provide help information on the function you are currently using.   Additional information on the CardData functions follows:

Print Card(s)

Phone Dialing

Add Card

Delete Card

Modify Card

Find Card(s)

Scroll CardData forward

Scroll CardData backward

Selecting cards by character

Selecting the Public CardData file

Selecting the Private CardData file

Print Card(s)

Print Card(s) can be invoked by pressing the Print button pictured above.   Alternatively you can select *File* from the CardData menu followed by *Print* from the *File* menu or press Control and P simultaneously.   The Print Card(s) function allows users to select the print range to print the current card, all cards, or the cards currently selected using the find key.   The output may be formatted to include just the address associated with the print range by checking *Address information only* or to print all information on the card by unchecking *Address information only*.   Users can also select to Print Envelopes and Print Labels from the Print Card dialog box.   The number of cards associated with the find key may be changed using the CardData Find Card(s) functionality.   The current font and character size may be changed by pressing the *Font* button or by pressing *File* followed by *Print Font*.

Print Envelope

Printing envelopes can be invoked by pressing the Print button pictured above followed by the Envelope button from the Print Card(s) dialog box.   Alternatively you can select *File* from the CardData menu followed by *Print Envelope* from the *File* menu.   The currently selected card will appear in the *Addressed to* field.   The return address may be entered in the *Return address* field.   Alternatively, the return address may be omitted by checking the *Omit Return Address* box.   The current font and character size may be changed by pressing *File* followed by *Print Font*.

Print Labels

Printing Labels can be invoked by pressing the Print button pictured above followed by the Labels button from the Print Card(s) dialog box.   Select the label type desired from the Label Selection list box.   If the current card was selected from the Print Card dialog box, the current card will be printed.   If all cards was selected, a label will be printed for all the cards in the card file.   If the find key was selected, only the cards matching the find sequence will be printed.   The current font and character size may be changed by pressing *File* followed by *Print Font*.

Phone Dialing

If you have a hayes or hayes compatible modem attached to a serial port on your computer, you can use the *Dial Phone* button pictured above to dial any of the phone numbers associated with the currently selected card. Alternatively you can select *File* from the CardData menu followed by *Phone Dialing*.   Select the phone number that you are interested in dialing and press the *Dial* button.   Note that you can hang up a call using the *Hangup* button.   If the dial command does not succeed, use the *Setup* button and make sure that the proper serial port and baud rate are selected along with your modem communication parameters.

<u>Notes</u>

If you are dialing through a central PBX you may need to use the prefix to activate an outside line.   Use commas where required to genereate 1 second delays.   Refer to your modem manual for details on your modem.

Add Card

New card data may be added using the add business card form.   This form is invoked using either the add card button pictured above, selecting the CardData *Edit* menu followed by *Add Card*, or pressing the INS (insert) key on your keyboard.   Minimally you must enter the company and the name for a card to be added to the selected card file.   To add notes associated with a business card, press the *Notes* button and enter this cards notes.   These notes may be quickly retrieved by positioning the mouse over the current card pictured in the main CardData window and pressing the left mouse button.

Delete Card

Card data may be deleted by selecting the delete button pictured above, selecting the CardData *Edit* menu followed by *Delete Card*, or by pressing the DEL (delete) key.   Note that the currently selected card will be deleted and that only one card may be deleted at a time.   The user is prompted for verification of the delete before the delete takes place

Modify Card

Card data can be modified by selecting the button pictured above, selecting the CardData *Edit* menu followed by *Modify Card*, or by pressing the + key.   Note that the currently selected card will be modified.   You must minimally enter at least the company and name for modify to accept the card data.

View a Card

Card data can be viewed by pressing the left mouse button on the card.   The additional information not shown on the main card will be displayed in the view screen.   To view a cards notes, press the right mouse button on the card.

Copy/Paste Card

Card data can be moved from the public file to the private file and vice-versa using the Copy/Paste functionality. For example, to copy a card from the public card file to the private card file select the Public checkbox then select the *Edit* menu entry.   By selecting *Copy Card* the current card will be copied to the clipboard.   To move this card into the private file deselect the Public checkbox, select the *Edit* menu entry again then select *Paste Card*.   A dialog box will be shown with the information you are about to add to the card data file, allowing for modification.   By pressing the OK button this card is added into the private card file.   You may automatically copy the current card to the clipboard by pressing the CTL (control) and C keys simultaneously and paste the current clipboard card into the card file by pressing the CTL and V keys simultaneously.

Copy Address

The address information associated with the currently selected card can be copied to the clipboard for use by standard text editors and word processors.   By selecting *Copy Address* from the *Edit* menu, the current cards name and address will be copied to the clipboard in text form for use as a mailing label or letter-head entry.

Find Card(s)

Individual and/or groups of cards may be found by selecting the button pictured above, selecting the CardData *Search* menu followed by *Find Card*, or by pressing the ALT and F3 keys simultaneously.   The currently selected card file is used for the search (<u>public</u> or <u>private</u>) using the *Find Key* selected as the field to search for and the *Find What* string entered.   All strings entered are case independent.   If multiple occurrences are found you can search forward using the *Find Next* button and search backward using the *Find Prev* button.

Scroll CardData forward

The currently selected CardData file (<u>public</u> or <u>private</u>) may be scrolled forward (the next available card will be selected) by pressing the button pictured above, by selecting the *Search* menu followed by *Next Card*, or using the up arrow of the numeric keypad.   When the end of the CardData file is reached, an audible tone will be generated.

Scroll CardData backward

The currently selected CardData file (<u>public</u> or <u>private</u>) may be scrolled backward (the previous card will be selected) by pressing the button pictured above, by selecting the *Search* menu followed by *Previous Card*, or using the down arrow of the numeric keypad.   When the end of the CardData file is reached, an audible tone will be generated.

Selecting cards by character

The currently selected CardData file may be directly accessed using the first character of the company name by pressing one of the buttons pictured above, or by pressing the *ALT*, *CTL* and the *desired first letter* simultaneously. If a match is found, the first card of the character group is displayed.   If no cards are found with a match, an audible tone will be generated and the card remains unchanged.

Select the Public CardData file

All business card data is stored in one of two files.   You can keep your information confidential and known only to you or it may be available to all CardData users.   By selecting the *Public* checkbox pictured above, all functions associated with CardData will be performed on the distributed CardData file.   All other CardData users have access to the information that is entered in this file.   Note that when the Public file is selected the CardData title bar displays *Public File*.   You can toggle between the Public and Private files by pressing the CTL and P keys simultaneously.   Note that this function is only available when connected to a file server.

Select the Private CardData file

All business card data is stored in one of two files.   You can keep your information confidential and known only to you or it may be available to all CardData users.   By deselecting the *Public* checkbox pictured above all functions associated with CardData will be performed on the local CardData file.   No other CardData users will have access to the information that is entered in this file.   Note that when the Private file is selected the CardData title bar displays *Private File*.   You can toggle between the Private and Public files by pressing the CTL and P keys simultaneously.   Note that when running in Local-Only mode, this is the only CardData file available.

Select the first CardData entry

The first card of the currently selected CardData file (public or private) may be selected by pressing the home key on the numeric keypad or by selecting the CardData *Search* menu followed by *Top of cardfile*.

Select the last CardData entry

The last card of the currently selected CardData file (public or private) may be selected by pressing the end key on the numeric keypad or by selecting the CardData *Search* menu followed by *Bottom of cardfile*.

Changing the CardData Settings

CardData has one user selectable setting that may be modified by pressing the *File* menu followed by *Settings*. Alternatively, you can press the right mouse button on any non-button area of the CardData screen.   The cards in the currently selected cardfile may be alternatively displayed by Company Name, Last Name, First Name and Middle Initial in a list box which appears to the left of the card file.   To enable or disable this listbox, select or de-select the Show Company / Name list entry.   Note you can speed up the performance of CardData by disabling this option when you have large card files..