

# Welcome to Smart Address

Smart Address is an easy to use, convenient Address Book and Diary for your Windows Desktop. With Smart Address running, you will always have your telephone numbers, addresses and diary entries, only a mouse click away.

[Legal Notice](#)

[Using Help in Smart Address](#)

[Smart Address Overview](#)

[An Introduction to...](#)

[Frequently Asked Questions](#)

[Ordering Smart Address](#)

[Upgrade Policy](#)

[Getting Support](#)

This software is supplied as is without warranty or representation either express or implied with respect to the program or its documentation including their quality, performance, merchantability, or fitness for a particular purpose.

In no event will Oakley Data Services or any of its agents or assigns, or any organisation distributing Smart Address on its behalf be liable for direct, indirect, special, incidental, or consequential damages arising out of the use of, or inability to use the program.

All trademarks are acknowledged.

# Legal Notice

## [License, Copyright and Disclaimer](#)

This product is commercial software and as such a license must be purchased to use the product.

If you have not already purchased a license for Smart Address you are granted a 30 day licence to review and evaluate the usefulness of this product. This 30 day period commences from the day the product is first installed. On completion of the 30 day evaluation period you are required to either remove the program from your computer and cease using it, or purchase a license for the product from Oakley Data Services or its agents.

You also have the right, and in fact you are actively encouraged, to distribute copies of the evaluation version of this product. You may assume you have our authority to distribute the evaluation, unless we explicitly tell you otherwise. It must, however remain in its original, unmodified state, and all its constituent files must be included. No-one may charge for the evaluation product itself, although a reasonable fee for the media used and copying costs is allowable.

You may not distribute copies of the licensed version of this product. You may not distribute the SMARTA3x.DLL file in any form.

This software is supplied as is without warranty or representation either express or implied with respect to the program or its documentation including their quality, performance, merchantability, or fitness for a particular purpose.

In no event will Oakley Data Services or any of its agents or assigns, or any organisation distributing Smart Address on its behalf, be liable for direct, indirect, special, incidental, or consequential damages arising out of the use of, or inability to use the program.

All trademarks are acknowledged.

# License Copyright and Disclaimer

## Agreement

The use of this program indicates your understanding and acceptance of the following terms and conditions. This license shall supersede any verbal or written statement or agreement to the contrary. If you do not understand or accept these terms you must cease using this product immediately.

## Copyright

This product is © Copyright 1996 by Oakley Data Services. This product is protected by United Kingdom copyright law and various international treaties. This software product and documentation may not, in whole or in part, be copied, photocopied, translated, or reduced to any electronic medium or machine readable form, without prior consent in writing from Oakley Data Services.

## Disclaimer

This product and/or license is provided as is, without any representation or warranty of any kind, either express or implied, including without limitation any representations or endorsements regarding the use of, the results of, or performance of the product, its appropriateness, accuracy, reliability, or correctness. The entire risk as to the use of this product is assumed by the user and/or licensee. Oakley Data Services do not assume liability for the use of this product beyond the original purchase price of the software. In no event will Oakley Data Services be liable for additional direct or indirect damages including any loss of profits or other incidental or consequential damages arising from any defects, or the use or inability to use the software, even if Oakley Data Services have been advised of the possibility of such damages.

## Restrictions

You may not use, copy, modify, translate, or transfer the software, documentation, or any copy except as expressly defined in this agreement. You may not attempt to unlock or bypass any licensing algorithm utilised by the program. You may not remove or modify any copyright notices.

The evaluation version of this product may be freely distributed. The licence enabling file which disables the reminder screens, that you receive with a full licence to the product, may not be distributed by anyone without the prior written authorisation of Oakley Data Services.

## Licence for Usage

You have the non-exclusive right to use the program only by a single person, on a single computer at a time. You may physically transfer the program from one computer to another, provided that the program is only installed on a single computer at a time. Network deployment is only permitted if you have purchased licences sufficient to cover the number of copies concurrently in use.

## Back-Up Copies

You may make one copy of the software solely for "back-up" purposes. The backup copy must include any copyright notices contained in the original.

## Licence Transfer

You may transfer the product to another party only if the other party agrees to all the terms and conditions of this agreement. If you transfer the program you must at the same time transfer any documentation and the back-up copy, or transfer any documentation and destroy the back-up copy. You may not retain any portion of the program, in any form, under any circumstance.

**Terms**

This license is effective until terminated. You may terminate it by destroying the software, the documentation and copies thereof. This license will also terminate if you fail to comply with any terms or conditions of this agreement. You agree upon such termination to destroy all copies of the program and of the documentation, or return them to Oakley Data Services.

**Other Rights**

All other rights not specifically granted in this licence are reserved by Oakley Data Services.

# Using Help in Smart Address

Help for Smart Address is supplied in ways:

## **Help File:**

This file provides a general overview of Smart Address and how to use it. This file covers topics such as the concepts behind Smart Address, printing, etc.

## **Context Help**

Smart Address also provides context help at appropriate points and this is the main way of getting detailed help about any specific parts of Smart Address. Context Help works by allowing you to click on any aspect of Smart Address and see a description of what you clicked on. To use the Context Help facility, click on any context help button, indicated by a "pointer and question mark"

## **See Also:**

[Help File Conventions](#)

# Help File Conventions

The Smart Address Help File uses certain conventions when describing special events. The conventions used are:

## **Keyboard Interaction:**

Where keyboard interaction is documented, the keystrokes used will be indicated within < > markers. For example:

"<Ctrl> and <U>" means press the "CTRL" Key and the "U" Key at the same time.

"<Right Arrow> or <Up Arrow>" means press EITHER the Right Arrow Key or the Left Arrow Key.

## **Menu Interaction:**

When Menu Commands are referred to, they will be specified as "Menu Name | Menu Command", meaning the command required is to be found under the Menu Name given. For example:

"File | Printer Setup" means the Printer Setup Command found under the File Menu

# Smart Address Overview

Smart Address has been designed as an easy to use, convenient Address Book and Diary for your Windows Desktop. With Smart Address running, you will always have your telephone numbers, addresses and diary entries, only a mouse click away.

Smart Address supports multiple Address Books and Diaries open at any one time, each being displayed in its own separate window within Smart Address.

Some of the many facilities supported, include:

- Configurable, multiple address pages per entry.
- Attaching of notes to entries.
- Grouping of entries into multiple, user definable, categories.
- Flexibility. All aspects of Smart Address are customisable by the user.
- Unlimited reminders can be associated with an entry. Smart Address will even remind you when a reminder is due. For example, Birthdays, Customer call required, etc.
- Alarm Notification facility, allowing reminders to be notified at a set time, regardless if Smart Address is the active application or not.
- Export and Import Wizards, allowing entries to be exported to, or imported from, text files.
- Unlimited number of documents can be attached to an entry. Enables information held in external files to be quickly located and accessed from within Smart Address
- Powerful Search capabilities, allowing pre-defined search criteria to be saved and re-used at later dates.
- Flexible Indexing, allowing Index Keys to be defined using multiple fields within an entry.
- Links directly into your Word Processor, allowing addresses to be inserted to your Word Processor with a single mouse click
- Full telephone support, including automatic dialling, re-dial if busy, manual dialling, call logging, credit calls, country and local code removal, and more....
- Powerful visual design and print facility, supporting envelopes, address labels and listings.
- "Quick Report" facility, allowing common print requirements to be stored, recalled and printed quickly.
- Built in support for over 100 common envelopes, labels and listing formats.
- Calendar View, allowing reminders from all opened Address Books, and events from all opened Diaries, to be consolidated into one single view.
- Automatic back-up of your Address Books and Diaries
- Support for Network Access to Address Books and Diaries.
- Plus much, much more...

## An Introduction to...

Smart Address has been designed as an easy to use, yet powerful, Address Book and Diary Management application. It works by allowing multiple Address Books or Diaries, to be created to store differing sets of Address details or Diary events. Because Smart Address uses the Windows Multi-Document Interface (MDI), multiple Address Books, or Diaries, may be open at any one time.

The following sections, introduce you to the various key components of Smart Address:

[Address Books](#)

[Diaries](#)

[Calendar View](#)

[Printing from Smart Address](#)

[Importing Information](#)

[Exporting Information](#)

[Using on a Network](#)

# Introduction to Address Books

The section introduces the main component of Smart Address, its' Address Books. The following topics cover the facilities that are provided by Smart Address relating to using these Address Books.

[Address Book Overview](#)

[Using Categories](#)

[Using Index Keys](#)

[Using Address Templates](#)

[Using Reminders](#)

[Tagging Entries](#)

[Dialling Telephone Numbers](#)

[Searching an Address Book](#)

[Managing Documents](#)

[Menu Commands](#)

## Address Book Overview

For any contact, you need to use some words that identify that particular contact from any other contacts you may have. For example, the words that may be used to identify your Bank Manager, might be "Bank Manager". Smart Address refers to such words as "Index Keys".

Smart Address uses Index Keys to represent each entry within an Address Book's Index List. This list is the scrollable list of entries on the left of an Address Book's data area. To find an entry, you would first locate it's Index Key, either by scrolling through the Index List or by performing a search of the Address Book. Once located, you simply click the mouse on the Index Key and the entry will be displayed within the data area.

So that a suitable Index Key can be created, Smart Address allows each Address Book to define which data fields are used for the Index Keys. To define these keys, use the Configure Address Book facility ("Tools | Configure Address Book")

For example, if your Address Book contains a number of Company contacts, you may choose to create your Index Keys from the Company field. When entries are added to the Address Book, the data entered to the Company field will appear in the Address Book's Index List. You may have a number of entries for the same company, which will appear in the Index List with the same Index Key. In order to avoid this problem, Index Keys are allowed to be created from multiple fields, so you could redefine the Address Book's Index Keys, to include the Company and Position fields, providing unique Index Keys for each entry.

When Index Keys are defined in the above way, they are referred to as the "default Index Keys", so when an entry is created it uses these default keys. If the default keys are changed to use different fields, then all entries using the default keys will automatically have their Index Keys changed to reflect the new default.

Each entry can override the default Index Keys by specifying its own Index keys. In the earlier example, your Address Book had been defined to use the Company and Position fields. You may find that some of your entries don't have Company or Position details, in which case you could use the First Name and Surname fields as Index Keys. When an entry has overridden the default keys, changing the default keys will not affect that entry and it will continue to use its own Index Keys.

By default, Smart Address uses each field within the Index Key as a "sort" field. The Index List is arranged in alphabetical order based on all words of the Index Key. If this default is not what you require, Smart Address allows you to override the "sort" fields. For example, if an Index Key consists of the Company and Position fields, this key could be sorted by Company, Position or both Company and Position.

As "sort" fields are part of the Index Keys, they can be defined as default or overridden at entry level.

## Using Categories

Smart Address supports category memberships for its entries. Each entry can belong to an unlimited number of categories. Categories allow you to group related contacts together, so that they may be acted on as a single group.

For example, your Address Book may contain both business and personal contacts. By defining which category each contact belongs to, you can easily limit any Smart Address activity just for your business contacts, or personal contacts.

Taking this example further, you could add a category of "Christmas Card". By placing selected contacts (both business and/or personal) into this category, you would be able to produce quickly and accurately, a list of who requires a Christmas card.

By default, Smart Address provides two categories, "Business" and "Personal". To add more categories use the Configure Address Book facility ("Tools | Configure Address Book"). To maintain an entry's list of category memberships, simply select the "Categories" data page.

If a category is deleted, all entries within that category lose their membership to it. In no other way will it affect an entry. Although categories are referred to by their unique category name, deleting a category then creating one with the same name, will still result in entries losing their membership of the deleted category.

## Using Index Keys

For any contact, you need to use some words that identify that particular contact from any other contacts you may have. For example, the words that may be used to identify your Bank Manager, might be "Bank Manager". Smart Address refers to such words as "Index Keys".

Smart Address uses Index Keys to represent each entry within an Address Book's Index List. This list is the scrollable list of entries on the left of an Address Book's data area. To locate an entry, you would first locate its Index Key, either by scrolling through the Index List or by performing a search of the Address Book. Once located, you simply click the mouse on the Index Key and the entry will be displayed within the data area.

So that a suitable Index Key can be created, Smart Address allows each Address Book to define which data fields are used for the Index Keys. To define these keys, use the Configure Address Book facility ("Tools | Configure Address Book")

For example, if your Address Book contains a number of Company contacts, you may choose to create your Index Keys from the Company field. When entries are added to the Address Book, the data entered to the Company field will appear in the Address Book's Index List. You may have a number of entries for the same company, which will appear in the Index List with the same Index Key. In order to avoid this problem, Index Keys are allowed to be created from multiple fields, so you could redefine the Address Book's Index Keys, to include the Company and Position fields, providing unique Index Keys for each entry.

When Index Keys are defined in the above way, they are referred to as the "default Index Keys", so when an entry is created it uses these default keys. If the default keys are changed to use different fields, then all entries using the default keys will automatically have their Index Keys changed to reflect the new default.

Each entry can override the default Index Keys and specify its own Index keys. In the earlier example, your Address Book had been defined to use the Company and Position fields, you may find that some of your entries don't actually have Company or Position details, but have a First Name and Surname. These entries could define their own Index Keys to use the First Name and Surname fields. When an entry has overridden the default keys, changing the default keys will not affect that entry and it will continue to use its own Index Keys.

By default, Smart Address uses each field within the Index Key as a "sort" field. The Index List is arranged in alphabetical order based on all words of the Index Key. If this default is not what you require, Smart Address allows the "sort" fields to be overridden. For example, if an Index Key consists of the Company and Position fields, this key could be sorted by Company, Position or both Company and Position.

As "sort" fields are part of the Index Keys, they can be defined as default or overridden at entry level.

## Using Address Templates

Within Smart Address all address information (position, company, address and telephone number fields) is contained within an Address Page, or Template. Smart Address allows an unlimited number of these templates within an Address Book. The format of each template can be customised. This allows various formatted address pages to be available to any entry. For example, you could create a page for personal contacts, a page for business contacts or even a page for just extra telephone numbers. Any entry could then make use of any one, or all, of these pages.

By default Smart Address provides a single template, "Address 1", which is added to all entries created. Additional templates can be created and customised, by using the Address Book Configuration facility ("Tools | Configure Address Book"). When creating new templates, the option is available to make any template a default. When a new entry is created, any default templates will be automatically added to that entry. Non-default templates need be added manually when required, using the entry's Select Address Templates facility ("Edit | Select Address Templates").

It should be noted that simply creating a default template, will not automatically add it to any existing entry. If you need a template adding to an existing entry, the entry has to be manually updated to use that template.

Each entry will represent the templates that it is using, by providing separate address pages on the entry's Address Data Page, with each page identified by a "page tab". To select, and therefore view, a page, you simply click the mouse on the tab of the template required.

Whilst entries hold any data associated with the templates they are using, they only hold a reference to the actual template itself. This means that if a template's format is altered, e.g., a field label updated or a field disabled, then that change will be reflected in all entries using the template.

If a template is deleted, then the reference to that template will be removed from any entry using it. This results in an entry losing any information contained within the deleted template.

Although templates are referred to by their unique template name, deleting a template then creating one with the same name, will still result in the information relating to that template being lost from any entries using the deleted template.

## Using Reminders

Reminders are used within Smart Address to recall certain events. For example, a reminder may be for a Birthday, the renewal of an insurance policy or just a record of someone's date of birth. In fact, a reminder can be used for anything that uses a date.

There are three types of reminder supported, "Note Only", "Once Only" and "Recurring".

"Note Only" reminders are used when you just need to make a note of a date, but do not need to be reminded about that date. For example, if you need to record the date you moved into a property, then you would create this as a "Note Only" as it is purely an historical reference date.

"Once Only" reminders are used when you need to be reminded about a singular forthcoming event. For example, if you need to write a letter in a months time to cancel a service

"Recurring" reminders are used when you need to be reminded at regular intervals. For example, if you need to remember a Birthday, you would create an annual reminder for the specified date. Smart Address will then remind you when that Birthday approaches. After the event you need to acknowledge the reminder which will advance it automatically to the following year.

Smart Address reminds you of approaching events, by displaying a reminder icon to the left of an entry's Index Key (for Address Books) and next to the event within the reminders list (Address Books and Diaries). Depending on the reminder, different icons are used:



The Reminder is overdue.



The Reminder is due today.



The Reminder is due within the next "x" days. The number of days in advance ("x") that a reminder is notified, depends on the Advance Warning setting (defined when the reminder was created). For example, if you need to send a Birthday card overseas, you have to allow more time for the card to be delivered, than you would to send a local card. By making use of the Advance Warning facility, you can still enter the Birthday on the correct date and still be notified in time to send the card.

By default, reminders are of a non-intrusive nature. When a reminder becomes due it can be seen only by viewing the Index List of the Address Book or the Reminder List of the appropriate Diary. If you need a more intrusive reminder, you can set an alarm call to be issued.

When an alarm is issued, a pop-up window will be displayed detailing any due or outstanding alarms. From this window the reminder issuing the alarm may be viewed by simply clicking the mouse. For the alarms to work Smart Address must be running, with the Address Books or Diaries containing any alarms, opened. However, Smart Address doesn't have to be the active application, so you could be using your Word Processor and Smart Address will still notify you of any alarms.

## Tagging Entries

Sometimes you may want to group Address Book entries together. If those entries are all members of a certain category, then they can be grouped by that category. However, when those entries don't have any one thing in common it is more difficult.

For example, if a sales office needs to produce a list of customers who have made sales enquires, then these customers are not necessarily going to have anything in common.

Smart Address provides a facility called "tagging". When an entry is tagged it is shown in red in the Address Book's index list. This tagged is saved with the entry, preserving the tagged status across sessions. When on longer required, the tag can be simply removed.

In the above example, tagging would be used to identify the customers who made sales enquires. This would work by the customer's entry being tagged when the enquiry was received (double-clicking the mouse on the entry's Index Key, will set or remove its tag). A report could then be generated detailing only the entries within the Address Book that have been tagged. Once this report has been produced, the tags can be removed from all entries, using one simply action.

# Dialling Telephone Numbers

If you have a modem connected to your computer, Smart Address will support automatic dialling of telephone numbers stored within an Address Book. With the dialling support built into Smart Address you can make phone calls using a variety of options, log each call and its duration.

If you don't have a modem connected, Smart Address will provide the same facilities, except you have to manually dial the telephone number.

Before dialling a telephone number, Smart Address has to be configured so that it knows whether you are going to use a modem to dial numbers or manually dial numbers. Also, it needs to know which dialling facilities you wish to make use of and how these should be configured.

These Dialling facilities are:

## **Credit / Charge Dialling.**

If you make use of a telephone service provider, they may require a provider and account (or PIN) code to be dialled before any telephone number. You can configure this information to prefix all / specified telephone numbers.

## **Prefix Calls**

If you are using Smart Address within an office environment, you may find that to make an outside telephone call you need to dial for an "outside line". Smart Address allows a prefix to be defined to all / specified telephone numbers.

## **Call Logging**

When a telephone call is made, Smart Address can be instructed to log all / specified calls. When a call is answered, Smart Address will initiate a timer window to record the duration of the call. When the call is complete, close the timer window and the call details will be logged to the appropriate entry.

## **Automatic Re-Dial**

When a number is busy (engaged) Smart Address can be instructed to automatically re-dial until it is answered.

## **Dialling Codes**

When a number is dialled from Smart Address, it can be instructed to check if the international or local code is the same as Smart Address' location settings. If either of these are the same, Smart Address will remove any unnecessary code from the number.

## Searching an Address Book

As your Address Book grows in size, it will become increasingly difficult to quickly locate contacts due to the number of entries you have to look through. If you know the exact Index Key used, then you can simply type the Index Key, providing the Index List has the focus. As you type the characters in, the Index List will automatically scroll to locate the entries beginning with the keys so far entered.

If you are not sure of the Index Key used, or you want to restrict the entries displayed to a particular sub-set of entries, then you need to apply a Filter using the Search function ("View | Search Address Book").

A Search Filter consists of various rules that define which entries appear in the Index List. Search filters can range from having a single rule defined, to being made up of a number of complex rules allowing precise searches to be performed.

When a search filter is created, it may be given a unique name and saved for future use. This allows you to store a number of filters that can be quickly applied at any time.

With a filter active, a "Search Active" indicator will appear on the Address Book's Status Bar and only entries that match the rules defined will be displayed. If an entry is updated so that it no longer matches the rules defined, its Index Key will be displayed in italics. When this happens, the search filter is referred to as being "dirty". To clear these dirty entries, you can either reapply the filter or simply double-click the mouse on the "Search Active" indicator.

If you close an Address Book while a filter is active, the filter is still applied when it's reopened.

## **Managing Documents**

When you contact someone, you may need quick access to files relating to that person. Smart Address allows an unlimited number of documents to be associated with any entry.

When a document is required, you simply switch to the entry's Documents Data Page and double-click on the document required. Smart Address will automatically load the document into the application that created it, allowing it to be viewed, edited or printed.

Using this facility, it is easy to group together and manage files relating to individual entries, providing a quick and convenient way to access their documents.

# Menu Commands

The following menus are available from any opened Address Book's menu.

Shortcut access is available to most Address Book menu commands, via use of the Toolbar. In order to identify what function a toolbar button performs, pause the mouse over a button and a "tooltip" describing the button's function will be displayed.

[File Menu](#)

[Edit Menu](#)

[Tools Menu](#)

[View Menu](#)

[Notes Menu](#)

[Documents Menu](#)

[Reminders Menu](#)

[Window Menu](#)

[Help menu](#)

## File Menu

The following commands are available from any Address Book's File Menu:

[New](#)

[Open](#)

[Save](#)

[Save as](#)

[Close](#)

[Lock Address Book](#)

[Address Book Info](#)

[Print](#)

[Quick Reports](#)

[Page Designer](#)

[Import](#)

[Export](#)

[Most Recently Used File List](#)

[Exit](#)

## **New Command**

This command allows either a new Address Book or Diary to be created.

## Open Command

This command allows either an existing Address Book or Diary to be opened.

When an Address Book or Diary is opened, if it is indicated as being locked (update access is not allowed) then one of the following has occurred:

- The file is marked as being a read-only file to Windows
- The file is located on a Network and you do not have update access to the file or it's location.
- The read-only option was selected on the Open Dialogue when the file was opened.

## **Save Command**

This command allows any outstanding updates to the current Address Book or Diary, to be saved.

If there aren't any outstanding updates, then this command will be disabled.

## **Save as Command**

This command allows the current Address Book or Diary, to be saved using a different file name.

When using this command a dialogue will be displayed allowing a new name and location for the file to be chosen. Once entered, the file will be saved under its new name.

## **Close Command**

This command will close the currently active window.

## Lock Address Book Command

This command allows the currently active Address Book to be locked. Locking an Address Book removes any update functions making the Address Book read-only.

A locked Address Book, will be indicated by the word "Locked" within the window title of the Address Book.

If the currently active Address Book is already locked, then this command allows the lock to be removed enabling updates to be made.

Note: If the Address Book is located on a Network and you do not have Network access to the Address Book or its location, then you will not be able to unlock this Book.

## **Address Book Info Command**

This command displays a dialogue providing information relating to the currently selected Address Book.

## **Print Command**

This command invokes the Smart Address Print Wizard which takes you through the steps to create Envelopes, Labels or Listings from your Address Book or Diary.

## Quick Reports Command

This command displays the Quick Reports dialogue, allowing any pre-defined Quick Reports to be edited, previewed or printed.

## **Page Designer Command**

This command will invoke the Smart Address Page Designer. The Page Designer allows envelope, label or listing designs to be created that can then be used to produce prints from Smart Address.

## **Import Command**

This command will invoke the Smart Address Import Wizard which will take you through the steps involved to import an external text file to either an Address Book or Diary.

## **Export Command**

This command will invoke the Smart Address Export Wizard which will take you through the steps involved to export entries from either an Address Book or Diary, to an external text file.

## **Most Recently Used File List**

The Most Recently Used File List provides a method of quickly opening previously used Address Books or Diaries.

Smart Address saves the last five files closed, so they can be quickly reopened by using a single click on the File Menu.

## **Exit Command**

This command terminates Smart Address.

## Edit Menu

The following commands are available from any Address Book's Edit Menu:

Undo

Copy Entry

Paste Entry

Duplicate Entry

Add Entry

Update Entry

Apply Addition / Update

Cancel Addition / Update

Delete Entries

Select Index keys for Entry

Select Address Templates for Entry

Find Entry with Text

Find Next

## Undo Command

This command reverses the last "x" actions (updates, additions, deletes, etc.) to an Address Book.

The actual number of actions that may be reversed, depends on the Undo Events setting defined to Smart Address. To alter this setting use the Options command ("Tools | Options") and increase or decrease the current value.

## **Copy Entry Command**

This command copies the currently displayed entry to the Windows clipboard allowing it to be pasted into another Address Book, via that Address Book's Paste command.

## **Paste Entry Command**

This command creates a new Address Book entry and pastes the entry copied to the Windows clipboard by a Copy Entry command, into the new entry.

## **Duplicate Entry Command**

This command will duplicate the currently selected entry within the Address Book

## **Add Entry Command**

This command will create a new entry within the Address Book, allowing data for that entry to be input.

Until this addition is applied or cancelled, the majority of the Address Book functions will be disabled, including the Index List.

## **Update Entry Command**

This command will allow the currently selected entry to be updated.

Until this update is applied or cancelled, the majority of the Address Book functions will be disabled, including the Index List.

## **Apply Addition / Update Command**

This command will process the new or updated Address Book entry, applying any changes made to the Address Book.

## **Cancel Addition / Update Command**

This command will cancel the new or updated Address Book entry, without applying any changes made.

## **Delete Entries Command**

This command displays a dialogue allowing the range of entries to be deleted from the Address Book to be specified.

If you only require to delete the currently selected entry, then it is quicker to use the "Delete" toolbar button or use the <Delete> key when the Index List has the focus.

## Select Index keys for Entry Command

This command displays a dialogue that allows the Index Keys used by the currently selected entry to be specified. This allows the entry to override the default Index Keys for the Address Book.

## Select Address Templates for Entry Command

This command displays a dialogue that allows the Address Templates used by the currently selected entry to be specified.

## Find Entry with Text Command

This command displays a dialogue that allows the entries from the currently selected entry to be search for a specified text string.

Once an entry has been located, that entry will be displayed. To continue searching from the displayed entry, press F3 or use the "Edit|Find Next" command.

Note: This command only searches entries currently listed within the Index List. If this list has been restricted by use of the Search command, then only that sub-set of entries will be searched.

## Find Next Command

This command finds the next entry matching the text string entered via the "Edit|Find Entry with Text" command

Once an entry has been located, that entry will be displayed. To continue searching from the displayed entry, press F3 or use the "Edit|Find Next" command again.

Note: This command only searches entries currently listed within the Index List. If this list has been restricted by use of the Search command, then only that sub-set of entries will be searched.

## Tools Menu

The following commands are available from any Address Book's Tools Menu:

[Change Screen Font](#)

[Configure Modem](#)

[Options](#)

[Configure Address Books](#)

[Insert into Word Processor](#)

[Tag Entry / Remove Tag](#)

[Apply Tags to Entries](#)

[Remove Tags from Entries](#)

[Dial Number](#)

[Telephone Call Log](#)

## **Change Screen Font Command**

This command displays a dialogue, allowing the font that is used by Smart Address for Address Books, Diaries and the Calendar View to be selected.

## **Configure Modem Command**

This command displays a dialogue, allowing the dialling facility of Smart Address to be configured.

If you don't have an modem, then you can still this command to configure the manual dialling option.

## Options Command

This command displays a dialogue allowing the global options for Smart Address to be configured.

## **Configure Address Books Command**

This command displays a dialogue allowing the options relating to the currently selected Address Book to be configured.

## **Insert into Word Processor Command**

This command inserts the selected fields of the current entry into your Word Processor. To define which fields are inserted, use the Address Book Configuration facility ("Tools | Configure Address Book").

## **Tag Entry / Remove Tag Command**

This command sets or removes the tag status from the currently selected entry.

## **Apply Tags to Entries Command**

This command displays a dialogue allowing the range of entries that are to be tagged to be specified.

If you only require to tag the currently selected entry, then it is quicker to use the tag shortcut of double-clicking the mouse on the entry's Index Key.

## Remove Tags from Entries Command

This command displays a dialogue allowing the range of entries that are to have their tags removed to be specified.

If you only require to remove the tag from the currently selected entry, then it is quicker to use the shortcut of double-clicking the mouse on the entry's Index Key.

## Dial Number Command

This command will display a dialogue allowing you to chose the telephone number to be dialled. It also allows you to override any of the global defaults for telephone dialling.

A shortcut for dialling a telephone number, is to click on the appropriate button on the telephone number field within a Address Book. This will then dial the number without first displaying a dialogue.

## **Telephone Call Log Command**

This command will display the Telephone Call log for the currently selected entry.

## View Menu

The following commands are available from any Address Book's View Menu:

[Address Page](#)

[Notes Page](#)

[Reminders Page](#)

[Others Page](#)

[Documents Page](#)

[Categories Page](#)

[Calendar](#)

[Search Address Book](#)

[Remove Active Search](#)

## **Address Page Command**

This command selects the Address data Page to be displayed. It is the same as clicking the Address tab on an Address Book.

Note: If the name of the Address page has been changed, ("Tools | Configure Address Book"), then the name of this command will reflect the page's new name.

## Notes Page Command

This command selects the Notes data Page to be displayed. It is the same as clicking the Notes tab on an Address Book.

Note: If the name of the Notes page has been changed, ("Tools | Configure Address Book"), then the name of this command will reflect the page's new name.

## Reminders Page Command

This command selects the Reminders data Page to be displayed. It is the same as clicking the Reminders tab on an Address Book.

Note: If the name of the Reminders page has been changed, ("Tools | Configure Address Book"), then the name of this command will reflect the page's new name.

## Others Page Command

This command selects the Others data Page to be displayed. It is the same as clicking the Others tab on an Address Book.

Note: If the name of the Others page has been changed, ("Tools | Configure Address Book"), then the name of this command will reflect the page's new name.

## Documents Page Command

This command selects the Documents data Page to be displayed. It is the same as clicking the Documents tab on an Address Book.

Note: If the name of the Documents page has been changed, ("Tools | Configure Address Book"), then the name of this command will reflect the page's new name.

## Categories Page Command

This command selects the Categories data Page to be displayed. It is the same as clicking the Categories tab on an Address Book.

Note: If the name of the Categories page has been changed, ("Tools | Configure Address Book"), then the name of this command will reflect the page's new name.

## **Calendar Command**

This command displays the Calendar View window which shows a consolidate view of all Reminder Events from any opened Address Book or Diary.

## **Search Address Book Command**

This command displays a dialogue allow a Search Filter to be created or loaded. Once applied that Search Filter will stay in effect until it is cancelled by the Remove Active Search command ("View | Remove Active Search").

## **Remove Active Search Command**

This command removes any currently active Search Filter and resets the Index List to display all entries within the Address Book.

## Notes Menu

The following commands are available from any Address Book's Notes Menu:

Cut

Copy

Paste

Delete

Select All

Add Timestamp

Find Text

Find and Replace Text

## **Cut Command**

This command removes the text selected in the Notes field and places it on the Windows Clipboard.

## **Copy Command**

This command copies the text selected in the Notes field and places it on the Windows Clipboard.

## **Paste Command**

This command inserts the contents of the Windows Clipboard at the cursor's position in the Notes fields and replaces any currently selected text.

## **Delete Command**

This command deletes the selected text from the Notes field.

## Select All Command

This command selects all the text contained within the Notes field.

## **Add Timestamp Command**

This command inserts a timestamp into the Notes field.

The placement and format of this timestamp depends on the timestamp settings defined using the Options command ("Tools | Options")

## **Find Text Command**

This command allows text, within the Notes field, to be located

## **Find and Replace Text Command**

This command allows text in the Notes field, to be located and replaced

## Documents Menu

The following commands are available from any Address Book's Documents Menu:

[Add Document](#)

[Remove Document](#)

[Edit Document](#)

[Open Document](#)

[View by Document](#)

[View by File Name](#)

[Large Icons](#)

[Small Icons](#)

[List](#)

[Detail](#)

[Properties](#)

## **Add Document Command**

This command allows a new document to be associated with the currently selected entry.

A shortcut for this command, is to simply "drag and drop" the document(s) to be added from Windows File Manager or Explorer, onto Smart Address.

## **Remove Document Command**

This command allows the currently highlighted document to be removed from the Address Book entry.

A shortcut for this command is to simply press the <Delete> key when the document list has the focus.

## **Edit Document Command**

This command allows the currently highlighted document's description and file name to be modified.

## **Open Document Command**

This command opens the currently highlighted document using the application that was used to create the document, so it to be viewed, edited or printed.

## **View by Document Command**

This command causes the documents list to be alphabetically sorted by each document's description.

## **View by File Name Command**

This command causes the documents list to be alphabetically sorted by each document's file name.

## **Large Icons Command**

This command causes the documents list to represent each document with a large icon and be named either by the Description or File Name depending on the "View by" option selected.

## **Small Icons Command**

This command causes the documents list to represent each document with a small icon and be named either by the Description or File Name depending on the "View by" option selected.

## List Command

This command causes the documents list to represent each document in a list and be named either by the Description or File Name depending on the "View by" option selected.

## **Detail Command**

This command causes the documents list to represent each document in a two lines per document list with both the description and file name being detailed.

## **Properties Command**

This command displays the currently highlighted document's properties.

## Reminders Menu

The following commands are available from any Address Book's Reminders Menu:

[Add Event](#)

[Edit Event](#)

[Delete Event](#)

[View Event](#)

[Acknowledge Event](#)

[Show Completed Events](#)

[Show Event Notes](#)

[Sort by](#)

## **Add Event Command**

This command displays a dialogue allowing a Reminder Event to be created.

## **Edit Event Command**

This command allows the currently highlighted Reminder Event to be modified.

## Delete Event Command

This command allows the currently highlighted Reminder Event to be deleted.

A shortcut for this command is to simply press the <Delete> key when the reminders list has the focus.

## **View Event Command**

This command allows all the details for the currently highlighted Reminder Event to be displayed.

## **Acknowledge Event Command**

This command allows the currently highlighted Reminder Event to be acknowledged.

When an Event is acknowledged, Smart Address checks to see if it has any future Events scheduled and if it has, advances the date automatically to the next date. If it hasn't then Smart Address just marks the Event as complete.

## **Show Completed Events Command**

This command enables the displaying of completed Reminder Events within the Reminders List.

## **Show Event Notes Command**

This command enables the display of a 2nd line of text within the Reminders List to display any notes that may have been attached to a Reminder Event.

## **Sort by Command**

This command allows the Reminders List to be sorted in a variety of ways depending on your requirement.

## Window Menu

The following commands are available from any window's Window Menu:

[Cascade](#)

[Tile](#)

[Arrange Icons](#)

[Close All](#)

[Window List](#)

## **Cascade Command**

On issuing this command via the Window Menu, Smart Address will arrange all Address Books and Diaries by cascading them within the Smart Address application window.

## **Tile Command**

On issuing this command, via the Window Menu, Smart Address will arrange all Address Books and Diaries by tiling them within the Smart Address application window.

## **Arrange Icons Command**

On issuing this command, via the Window Menu, Smart Address will arrange any minimized Address Book or Diary Icons.

## **Close All Command**

This command closes all active Address Books and Diaries. If an Address Book or Diary has been updated but not saved, Smart Address will save it to disk before closing.

If the Automatic Back-up Option is enabled, Smart Address will also create a back-up copy of each Address Book or Diary as it is closed.

## **Window List**

Maintained within the Window menu, is a list of the currently opened Address Books and Diaries. Choosing any one of these from the list, will select it.

# Help Menu

The following commands are available from any window's Help Menu:

[Contents](#)

[Search for Help on](#)

[Using Help](#)

[Printing Overview](#)

[Order Smart Address](#)

[Frequently Asked Questions](#)

[Getting Support](#)

[About Smart Address](#)

## **Contents Command**

On issuing this command, Smart Address will display the Contents screen of this Help File.

## **Search for Help on Command**

On issuing this command, Smart Address will display the Search Dialogue for this Help File, allowing the user to search for any required keyword.

## Using Help Command

On issuing this command, Smart Address will display the Windows Guide to Using Help Files. This guide provides basic information on how to use Windows Help files.

## **Printing Overview Command**

On issuing this command, Smart Address will display the Printing Overview tutorial which takes you through the process of designing and producing a print from Smart Address.

## **Order Smart Address Command**

On issuing this command, Smart Address will display the Order Form for ordering copies of Smart Address.

## **Frequently Asked Questions Command**

This command will display the Frequently Asked Questions list for using Smart Address.

## **Getting Support Command**

This command will display how to obtain technical support for Smart Address

## **About Smart Address**

This command will display the About Smart Address dialogue. This dialogue provides information on the current build and version of Smart Address that you are running.

# Introduction to Diaries

This section introduces the Diary component of Smart Address.

[Diary Overview](#)

[Using Reminders](#)

[Menu Commands](#)

## Diary Overview

Each Diary is stored as a disk file and holds all the information and 'personality' of that Diary. The 'personality' is the customisable aspects of a diary, the location of the diary window when it's opened, the display options selected, etc.

As disk files can be damaged or lost, and users may forget to back-up their files, Smart Address by default will always create a back-up copy of each diary when it is closed. If problems occur with the disk file, the back-up file can be used to recreate the lost or damaged diary in full.

When a back-up of the diary is created, it is created in the same location as the original with the same name. However, to differentiate it from the original, the .SDY file extension is renamed to .BKD. To open a back-up file created by Smart Address, select the Back-up File filter from the "List Files of Type" field on the "Open Diary" dialogue.

Information within a Diary is held as Event Reminders, each reminder contains all information relating to that event. These reminders allow dates to be set for an event and instructs Smart Address to remind you when that date becomes due. Smart Address can also automatically advance the set date by any period, once you have acknowledged it. This facility is designed to allow Birthdays, Customer Calls, etc., to be scheduled.

There is a facility to Import reminders that may have been created by other applications into a diary and also a facility to export reminders from a diary. There is also a powerful design and print facility, allowing diary listings to be produced, in a totally user customisable format, for any range of dates.

# Menu Commands

The following menus are available from any opened Diary's menu:

Shortcut access is available to most Diary menu commands, via use of the Toolbar. In order to identify what function a toolbar button performs, pause the mouse over a button and a "tooltip" describing the button's function will be displayed.

[File Menu](#)

[Tools Menu](#)

[View Menu](#)

[Reminders Menu](#)

[Window Menu](#)

[Help Menu](#)

## File Menu

The following commands are available from any Diary's File Menu:

[New](#)

[Open](#)

[Save](#)

[Save as](#)

[Close](#)

[Lock Diary](#)

[Diary Info](#)

[Print](#)

[Quick Reports](#)

[Page Designer](#)

[Import](#)

[Export](#)

[Most Recently Used File List](#)

[Exit](#)

## Lock Diary Command

This command allows the currently active Diary to be locked. Locking a Diary removes any update functions making the Diary read-only.

A locked Diary, will be indicated by the word "Locked" within the window title of the Diary.

If the currently active Diary is already locked, then this command allows the lock to be removed enabling updates to be made.

Note: If the Diary is located on a Network and you do not have Network access to the Diary or its location, you will not be able to unlock the Diary .

## **Diary Info Command**

This command displays a dialogue providing information relating to the currently selected Diary.

## Tools Menu

The following commands are available from any Diary's Tools Menu:

[Change Screen Font](#)

[Configure Modem](#)

[Options](#)

## View Menu

The following commands are available from any Diary's View Menu:

[Calendar](#)

## Reminders Menu

The following commands are available from any Diary's Reminders Menu:

[Add Event](#)

[Edit Event](#)

[Delete Event](#)

[View Event](#)

[Acknowledge Event](#)

[Show Completed Events](#)

[Show Future Recurring Events](#)

[Show Event Notes](#)

[Sort by](#)

[Select Today's Date](#)

[Go to Date](#)

## **Show Future Recurring Events Command**

This command enables the displaying of future recurring events within the Reminders List.

## **Select Today's Date Command**

This command will select today's date as the currently displayed date in the Diary or Calendar.

## **Go to Date Command**

This command displays a calendar dialogue allowing any date to be selected. The date selected from this dialogue will become the currently displayed date in the Diary or Calendar.

# Introduction to the Calendar View

The section introduces the Calendar View component of Smart Address.

[Calendar View Overview](#)

[Menu Commands](#)

## Calendar View Overview

Smart Address allows reminders, or date events, to be held within Address Books or Diaries. Due to this, it is hard to obtain an overall view of what reminders are actually scheduled for which days. For example, there may be a reminder for a certain date, spread across multiple Address Books, and multiple entries within those Address Books.

To enable all of these reminders to be consolidated into a single view, Smart Address provides a Calendar View that may be simply invoked at any time.

The calendar view automatically extracts reminders from all Address Books and Diaries that are open, enabling these reminders to be viewed in either a day, month or year view. As Address Books or Diaries are opened, updated or closed, the calendar view will be automatically renewed.

# Menu Commands

The following menus are available from the Calendar View's menu:

Shortcut access is available to most Calendar View menu commands, via use of the Toolbar. In order to identify what function a toolbar button performs, pause the mouse over a button and a "tooltip" describing the button's function will be displayed.

[File Menu](#)

[Tools Menu](#)

[Reminders Menu](#)

[Window Menu](#)

[Help Menu](#)

## File Menu

The following commands are available from the Calendar View File Menu:

[New](#)

[Open](#)

[Close](#)

[Page Designer](#)

[Most Recently Used File List](#)

[Exit](#)

## Tools Menu

The following commands are available from the Calendar View Tools Menu:

[Change Screen Font](#)

[Configure Modem](#)

[Options](#)

## Reminders Menu

The following commands are available from the Calendar View Reminders Menu:

[View Event](#)

[Go to Event](#)

[Show Completed Events](#)

[Show Future Recurring Events](#)

[Show Event Notes](#)

[Sort by](#)

[Today](#)

[Go to Date](#)

## **Go to Event Command**

This command will locate and display the highlighted Reminder Event's host Address Book, or Diary.

# Printing from Smart Address

This section introduces the Printing component of Smart Address.

[Page Designer](#)

[Print Wizard](#)

[Print Preview](#)

[Quick Reports](#)

# Page Designer

This Section introduces the Page Designer component of Smart Address.

[Page Designer Overview](#)

[Menu Commands](#)

## Page Designer Overview

Before a print can be produced by Smart Address, it needs to know how the data is to be printed. For example, what data fields are required and where on the paper those fields should be positioned.

This information is supplied by a Page Layout Design, which are visual representations of the type of paper being used and the text that is to be printed. To create a Page Layout Design, you need to use the Page Designer which is the visual print design tool within Smart Address.

When a Page Layout is created, the Page Designer displays a scaled image of the printable page, based on the paper and printer being used. This scaled image is referred to as the "Page Canvas"

In order to be able to specify what appears on this Page Canvas, data fields are represented by Data Objects which may be selected and "dropped" onto the Page Canvas. In addition to these data objects, static objects are available allowing a number of additional items to be printed. These items include page numbers, lines, graphics, static text, etc. Once an Object has been placed on the Page Canvas, it may be formatted, moved or re-sized.

Simply by selecting, dropping and formatting any required objects, you can quickly design a complex print, that supports either output to an envelope, to labels or to listings.

Once you have created your layout, you need to save the design to the Page Layout Library. This library holds all Page Layouts and is used when generating a print, to specify which layout the print should use.

# Menu Commands

The following menus are available from the Page Designer:

Shortcut access is available to most Page Designer commands, via use of the Toolbar. In order to identify what function a toolbar button performs, pause the mouse over a button and a "tooltip" describing the button's function will be displayed.

[File Menu](#)

[Tools Menu](#)

[Objects Menu](#)

[Window Menu](#)

[Help Menu](#)

## File Menu

The following commands are available from the Page Designer File Menu:

[New Layout](#)

[Open Layout](#)

[Close Layout](#)

[Save Layout](#)

[Save Layout as](#)

[Maintenance](#)

[Paper Setup](#)

[Return](#)

## **New Layout Command**

This command displays a dialogue allowing a new Page Layout to be created. Once created, the new Layout will be loaded into the Page Designer.

## **Open Layout Command**

This command displays a dialogue allowing an existing Page Layout to be loaded into the Page Designer.

## **Close Layout Command**

This command will close the currently loaded Page Layout.

## Save Layout Command

This command will save the currently loaded Page Layout to its disk file.

Page Layouts are stored as separate disk files, within the Smart Address configuration directory, with the name ???????.TPL

Note: ???????? refers to the internal layout id which is automatically generated by the Page Designer when the layout is created.

## **Save layout as Command**

This command allows the currently loaded Page Layout to be saved with a different Page Layout name. This is useful if you wish to copy an existing Page Layout.

## **Maintenance Command**

This command displays a dialogue allowing any Page Layout to be modified, renamed or deleted.

Note: If a Page Layout is currently loaded, then the maintenance functions will not be available for that Layout. If you need to perform any maintenance on the current Page Layout, you should close it first.

## **Paper Setup Command**

This command allows the Paper Sizes defined to Smart Address to be modified or new papers defined. The Page Designer uses these paper sizes to determine which type of paper the layout is using.

## **Return Command**

This command closes the Page Designer or Print Preview window and returns control back to Smart Address.

## Tools Menu

The following commands are available from the Page Designer Tools Menu:

[Set Return Address](#)

[Show Borders](#)

[Show Rulers](#)

[Measurement Units](#)

[Enable Headers](#)

[Enable Footers](#)

[Set Alignment Grid](#)

[Preview](#)

## **Set Return Address Command**

This command displays a dialogue allowing the text to be defined as your "Return Address".

This Return Address is used whenever a "Return Address" object is placed on a Page Layout. If you change the text defined, then ALL Page Layouts will be updated to reflect the change.

## **Show Borders Command**

This command enables the displaying of borders around each object on a Page Layout.

These borders are only visual indicators as to the size of any object and as such do not appear on the final print.

## **Show Rulers Command**

This command enables the showing of horizontal and vertical rules with the Page Layout. These rulers can then be used as a guide to where objects are being placed.

## **Measurement Units Command**

This command allows the measurement units used to be specified. You may use either Inches or Centimeters.

## **Enable Headers Command**

This command is only available when the paper type selected for the Layout is a Listing.

Enabling Headers, provides a margin at the top of the layout that may contain objects that will print at the top of every page printed.

## **Enable Footers Command**

This command is only available when the paper type selected for the Layout is a Listing.

Enabling Footers, provides a margin at bottom of the layout that may contain objects that will print at the foot of every page printed.

## **Set Alignment Grid Command**

This command displays a dialogue allowing the Grid option to be selected. When the Grid option is selected, any objects moved or dropped will automatically "snap" to the nearest Grid unit.

## Preview Command

This command allows the Page Layout to be previewed to see how the layout would print with "live" data.

In order that the Print Preview has some "live" data to use, it automatically locates the first Address Book or Diary, depending on the data being printed, and performs the preview against this file. If there isn't any suitable data available, then this command will be disabled.

# Objects Menu

The following commands are available from the Page Designer Objects Menu:

[Delete Objects](#)

[Align Objects](#)

[Align Text](#)

[Size](#)

[Change Text Font](#)

[Property Editor](#)

[Bring to Front](#)

[Send to Back](#)

## **Delete Objects Command**

This command will delete all the currently selected objects from the Page Layout

## **Align Objects Command**

This command will align the specified edge of all the selected objects on the page layout, to the same edge of the first object selected.

## **Align Text Command**

This command will align the text for the currently selected objects on the Page Layout, to be either left, right or centre aligned.

## **Size Command**

This command allows the size of the selected objects on the Page Layout, to be specified or adjusted in relation to the other selected objects.

## **Change Text Font Command**

This command allows the font used for the selected objects on the the Page Layout, to be changed.

## **Property Editor Command**

This command invokes the property editor for the currently selected object on the Page Layout.

If more than one object is selected, then this command will be disabled.

## **Bring to Front Command**

This command causes the selected object on the Page Layout, to be move to the front of the display.

This is used when you may have two overlapping objects and you need to ensure that one of those objects is printed on top of the other one.

## **Send to Back Command**

This command causes the selected object on the Page Layout, to be move to the back of the display.

This is used when you may have two overlapping objects and you need to ensure that one of those objects is printed behind the other one.

## Print Wizard

The Print Wizard is invoked by the Print command ("File | Print") from any Address Book or Diary File menu.

The Print Wizard will step through the selection process to generate a printed report from Smart Address.

During this process, you will have to select a Page Layout to be used, which you should have already created using the Page Designer.

Once the selections have been made, the Print Wizard, if requested, will save the selections into a Quick Report file. This file will allow the report defined to be rerun at a later time, without having to enter all the required information again.

Finally, the Print Wizard will offer the choice of whether you wish to Print the generated report or preview it using the Print Preview facility.

# Print Preview

This section introduces the Print Preview component of Smart Address.

[Print Preview Overview](#)

[Menu Commands](#)

## **Print Preview Overview**

The Print Preview facility in Smart Address allows any print produced to be viewed before printing.

When a print is previewed, the Print Preview facility formats the print as it would be printed and then displays an image of that print. From this image, you can page through the print, zoom in or out to adjust the detail displayed and when you are happy that it is what you wanted, print it to your printer.

Print Previews may be requested from the Page Designer, the Print Wizard or from the Quick Reports Dialogue.

# Menu Commands

The following commands are available for the Print Preview:

[File Menu](#)

[Tools Menu](#)

[Window Menu](#)

[Help Menu](#)

## File Menu

The following commands are available from the Print Preview File Menu:

[Print](#)

[Return](#)

## **Print Command**

This command will print the currently previewed report.

## Tools Menu

The following commands are available from the Print Preview Tools Menu:

[Zoom In](#)

[Zoom Out](#)

[Full Page](#)

[Page Width](#)

[First Page](#)

[Previous Page](#)

[Next Page](#)

[Last Page](#)

## **Zoom In Command**

This command causes the size of the preview image to increase by 10%, in effect zooming into the image.

## **Zoom Out Command**

This command causes the size of the preview image to decrease by 10%, in effect zooming out of the image.

## **Full Page Command**

This command scales the preview image, so the whole page of the report is visible within the Print Preview window.

## **Page Width Command**

This command scales the preview image, so the whole page width of the report is visible within the Print Preview window.

## **First Page Command**

This command changes the report page displayed, to display Page 1

## **Previous Page Command**

This command changes the report page displayed, to display the previous page.

## **Next Page Command**

This command changes the report page displayed, to display the next page.

## **Last Page Command**

This command changes the report page displayed, to display the last page of the report.

## Quick Reports

To produce a print from Smart Address, you have to use the Print Wizard ("File | Print") so that the required print selections can be made. Whilst the Print Wizard is ideal when producing one-off prints, it is not very convenient when you need to keep producing the same print. To cater for this, the Print Wizard can store the selections input, within a Quick Report.

Once a Quick Report has been generated by the Print Wizard, that report can be run whenever required, simply by invoking it from the Quick Reports Dialogue ("File | Quick Reports").

An even easier way of invoking an often required Quick Report, is to assign it to one on the Quick Report toolbar buttons. Then whenever you then need to run the Quick Report you can simply click the toolbar button concerned.

## Importing Information

In order to be able to use information from other applications, Smart Address provides the Import facility.

This facility allows you to import address books or diaries from other applications into Smart Address. The limitation to what applications you can use information from, is that the application must be able to save its data as a Comma Separated Value (CSV) or Text file. Once you have a suitable file produced by the other application, the Smart Address' Import Wizard will take you through the process of importing that information into Smart Address.

## Exporting Information

In order to be able to provide information to other applications, Smart Address provides the Export facility.

This facility provides a Export Wizard which allows data from Smart Address to be exported to a Comma Separated Value (CSV) file. This file can then be loaded into another application. For example, you may wish to analyse an entry's telephone call log. To do this you could export the telephone log and then load the exported file into a spreadsheet.

# Using on a Network

## **Networking Address Books**

Smart Address supports the sharing of Address Books or Diaries over a Network.

In order to share an Address Book or Diary, it should be located on the Network so all users have access to it. The Network File Permissions should then be set so that only one person has update access to it, with everyone else having Read-Only access. The person with update access, acts as the maintainer of the Address Book or Diary, and is responsible for all updates. This allows a centralised and controlled Address Book, or Diary, to be easily delivered to all users.

When the maintainer of an Address Book or Diary makes any changes to its entries, Smart Address can ensure that any open read-only versions of that file, are automatically synchronised to reflect the changes made. It isn't necessary for users to have close the Address Book and reopen it to refresh the data from the Network.

Smart Address can also be installed to be run from a Network. To do this, install Smart Address to a location on the Network all users have access to and then set the Network File Permissions to Read-Only for the Smart Address directory.

## **Multiple Copy Licenses**

It should be remembered that a license for a single copy of Smart Address allows you to use it on a single PC, and to make back-up copies for security purposes. It does not permit installation on more than one PC at the same time, or use on multiple workstations connected to a network.

However, we do offer extremely attractive discounts for multiple-copy licenses, allowing you to make Smart Address an integral part of your network, site or corporation. Please contact us for details.

# Frequently Asked Questions

This section provides the answers to some frequently asked questions regarding Smart Address:

**Q:** "When creating a Reminder, setting the scheduled until date to anything over 1999 (ie 2000), I get a message "The 'Schedule Until' Date may not be before the 'Reminder Date'. If you go back to the date then it has been set as 19?? instead of 20??"

**A:** This is caused by Windows being set-up to use two year digits (yy) in its Short Date Format. As the Short Date format only covers the years 00 - 99, entering the year as 01 causes Windows to take the year as 1901. To solve this problem, use Windows Control Panel and specify four digits for the year (yyyy).

**Q:** "How can I quickly locate an entry within the Index List?"

**A:** When the Index List has the focus, you can just type in the entry you require and as you type, the Index List will be automatically scrolled to display the entry that matches what you have typed so far.

**Q:** "How can I have more than four telephone numbers per entry?"

**A:** You need to create a new Address Template and set the entry to use this new template. This template will then provide an additional four telephone numbers. Remember, if you don't need the extra address lines, the template can be configured not to show these.

**Q:** "Why do my previewed envelopes not appear to scale ?"

**A:** If your printer supports the envelope size you are printing to, or supports custom sized paper, then the envelope will be scaled correctly. If not, then Smart Address prints the envelope in relation to a full sheet of paper, hence the preview is showing your print, on a full sheet of paper.

**Q:** "I am having problems printing envelopes"

**A:** Please see [Problems Printing Envelopes](#)

**Q:** "Can I make the Index List on an Address Book wider ?"

**A:** Yes. Between the Index List and Data Pages, there is an invisible "splitter bar". As you pass the mouse over this bar, the pointer will change. When the pointer changes, click the mouse and drag the bar to a new position

## Ordering Smart Address

You can purchase your copy of Smart Address by Phone, Fax, Mail or E-Mail. We accept cheques in Sterling, or VISA, Mastercard or American Express. If you have a CompuServe account you can also purchase via the SWREG service. Smart Address' SWREG product ID is 4521 and the price via this mechanism is currently 39 US Dollars.

### Printing an Order Form

You can access an order form if you wish to purchase by Fax, Mail or E-Mail by pressing the 'Order' button on the "Evaluation Copy" screen, or via "Help | Ordering". The order form shows the current license fees, addresses and phone numbers.

### Multiple Copy Licenses

Purchase of a single copy of Smart Address allows you to use it on a single PC, and to make back-up copies for security purposes. It does not permit installation on more than 1 PC at the same time, or use on multiple workstations connected to a network.

However, we do offer extremely attractive discounts for multiple-copy licenses, allowing you to make Smart Address an integral part of your network, site or corporation. Please contact us for details.

### Which Version Have You?

If you purchase by phone, please let us know which version of the product you have been evaluating (shown by "Help | About Smart Address"). This helps us to determine how effective our distribution methods are. If you use the order form the version number is already pre-printed on it.

## Upgrade Policy

The majority of the code for the licensed and evaluation versions of this product, is identical. It is the presence of a non-redistributable file, SMARTA3x.DLL that is supplied with the license that causes the product to behave in a licensed fashion, preventing the issuing of the "Evaluation Copy" messages.

The presence of the licensed SMARTA3x.DLL file will also cause any further versions of the product that still bear the 3.xx release number to behave as licensed versions, wherever you obtain them from. Versions that bear the 3.xx release number will generally be for minor enhancements and bug-fixes. Any release containing major new functionality will bear the release number 4.xx, and an upgrade fee will probably be chargeable.

We will make new versions of the product available via the usual sources, on-line services such as CompuServe, CIX and the Internet and via disk vendors, cover disks and CD's.

The prime locations for new releases are our support section on CompuServe, section 4 of the UKSHARE forum, and our Internet site at <http://www.smartcode.com>.

If you do obtain a newer version of the product simply make sure that the SMARTA3x.DLL file that you received when you purchased your licence, remains in either your Windows directory, or the directory you have Smart Address installed to.

# Getting Support

Before raising a support call, please make sure you have looked through the Help File first, and in particular the Frequently Asked Questions section.

## [Frequently Asked Questions](#)

If you have a question that this Help File doesn't answer, or are reporting what appears to be a bug then we will be pleased to hear from you. But if it is a question that is answered in this Help file then all we will do is point you to the relevant section. This is not meant to be awkward, but we try to keep our costs down to allow us to produce high quality software at value-for-money prices and answering support calls is an expensive undertaking. After all, some of the major software companies either charge for support or provide it on premium-price phone numbers. We don't want to have to do that.

If the answer is not in the Help File or you've found a bug, you can contact us, depending if you are a licensed user or not, as below:

## [Licensed Users](#)

## [Evaluation Users](#)

# Support for Licensed Users

**Please Note:** To receive priority support as a Licensed User, please ensure that your Support Code is clearly quoted in all correspondence. Without this code, your support request will have a lower priority. Your Support Code is detailed on the About box of Smart Address ("Help | About").

## By Phone

You can call your local distributor (details from Help|Ordering), or call us directly. If you choose to contact us directly please remember we are located in England, so if it is 10 a.m. where you are it may be the middle of the night in England, and nobody is going to be available to take your call. Our normal office hours are 9.00 a.m. to 5.00 p.m. UK time.

Please don't call out of office hours and just leave a message (or a fax) asking us to call you back - so many people have abused this, we now do not return calls left on the phone (or fax).

## By E-Mail

Alternatively you can E-Mail your queries direct to us . Please remember to quote your support code at the top of the message. We try to respond to E-Mail queries from licensed users by return. This is probably the best choice for a quick reply.

## Other mechanisms

You can also use any of the mechanisms described for [Evaluation Users](#)

# Evaluation Users

## On-Line

This is the quickest way to get support. We have support forums on a variety of On-Line Services and we monitor them daily, or your question might be answered even quicker by a fellow user. Even if you aren't directly connected to one of these on-line services then you may be able to access them from a service you are connected to (for example the Internet Newsgroups). We offer support on the following services:-

## Compuserve

GO UKSHARE and ask your question in section 4, Oakley Data

## CIX

Join the Oakley conference and ask your question in the Smart Address topic.

## Internet

Ask in the comp.os.ms-windows.win95.misc or comp.os.ms-windows.misc newsgroups. Include the text "Smart Address" in the message header and we will see it.

## By Mail

You can write to us at:-

Oakley Data Services,  
Smart Address Support,  
3, Oakley Close,  
Sandbach,  
CW11 9RQ,  
England.

or write to your local distributor.

## By Fax

You can fax your questions to us. Faxes are answered within 10 days. If you are a Licensed User, include your support code and we will respond more quickly. If many similar questions arise, we include them in the FAQ and will send you a copy. If you have a unique query or have found a bug, we will respond individually.

## By E-Mail

You can E-Mail your questions to us. E-Mails are answered within 10 days. If you are a Licensed User, include your support code and we will respond more quickly. If many similar questions arise, we include them in the FAQ and will send you a copy. If you have a unique query or have found a bug, we will respond individually.

# Date and Time Formatting

Various options within Smart Address, allows date and time formatting strings to be specified to control how a date may be displayed or a time-stamp formatted.

The following specifies (in bold) can be used in these options:

## **C**

Displays the date using the format given by Windows Short Date Format, followed by the time using the format given by Windows Long Time Format.

## **d**

Displays the day as a number without a leading zero (1-31).

## **dd**

Displays the day as a number with a leading zero (01-31).

## **ddd**

Displays the day as an abbreviation (Sun-Sat).

## **dddd**

Displays the day as a full name (Sunday-Saturday).

## **dddddd**

Displays the date using the format defined by Windows Short Date Format.

## **ddddddd**

Displays the date using the format given by Windows Long Date Format.

## **m**

Displays the month as a number without a leading zero (1-12). If the m specifier immediately follows an h or hh specifier, the minute rather than the month is displayed.

## **mm**

Displays the month as a number with a leading zero (01-12). If the mm specifier immediately follows an h or hh specifier, the minute rather than the month is displayed.

## **mmm**

Displays the month as an abbreviation (Jan-Dec)

## **mmmm**

Displays the month as a full name (January-December).

## **yy**

Displays the year as a two-digit number (00-99).

## **yyyy**

Displays the year as a four-digit number (0000-9999).

## **h**

Displays the hour without a leading zero (0-23).

## **hh**

Displays the hour with a leading zero (00-23).

**n**

Displays the minute without a leading zero (0-59).

**nn**

Displays the minute with a leading zero (00-59).

**s**

Displays the second without a leading zero (0-59).

**ss**

Displays the second with a leading zero (00-59).

**t**

Displays the time using the format given by Windows Short Time Format.

**tt**

Displays the time using the format given by Windows Long Time Format

**am/pm**

Uses the 12-hour clock for the preceding h or hh specifier, and displays 'am' for any hour before noon, and 'pm' for any hour after noon. The am/pm specifier can use lower, upper, or mixed case, and the result is displayed accordingly.

**a/p**

Uses the 12-hour clock for the preceding h or hh specifier, and displays 'a' for any hour before noon, and 'p' for any hour after noon. The a/p specifier can use lower, upper, or mixed case, and the result is displayed accordingly.

**ampm**

Uses the 12-hour clock for the preceding h or hh specifier, and displays the contents of the Windows AM Format for any hour before noon, and the contents of the Windows PM Format for any hour after noon.

**/**

Displays the date separator character given by the Windows Date Separator variable.

**:**

Displays the time separator character given by the Windows Time Separator variable.

**'xx'/"xx"**

Characters enclosed in single or double quotes are displayed as-is, and do not affect formatting.

Format specifiers may be written in upper case as well as in lower case letters--both produce the same result.

If the string given by the Format parameter is empty, the date and time value is formatted as if a 'c' format specifier had been given.

# Smart Address Version 3.x Order Form

Send your order to:-

Oakley Data Services,  
Lion Buildings,  
Market Place,  
Uttoxeter,  
Staffs, ST14 8HZ,  
United Kingdom

Telephone: +44 (0)1889 565064  
Fax: +44 (0)1889 563219  
E-Mail: 74774.1347@compuserve.com

Please send me \_\_\_ licensed copy(s) of Smart Address Version 3.

I want the \_\_\_ 16bit Windows 3.x Version

(or) \_\_\_ 32bit Windows 95 / Windows NT Version

**Price :- £29.38 Pounds Sterling.**

(In the EEC this is made up of 25.00 Pounds, plus VAT @17.5%, no charge for shipping. In the rest of the world this is made up of 25.00 Pounds, plus 4.38 Pounds Air-Mail Shipping + Handling. As of March 1996 the exchange rate was approximately 1.55 U.S. Dollars to 1.0 Pound Sterling. When we charge your credit card the card company will convert the cost to your local currency at the rate then prevailing and the sum will appear on your bill in your local currency.)

**Total Price : .....**

I enclose a cheque / wish to pay by MasterCard / Visa / Amex (delete as applicable). (Note: **We can only accept cheques payable in the UK drawn in Sterling.**)

**Credit Card Details:-**

Name as on card:-

Card Number:-

Expiry Date:-

**Please send the licensed version to:-**

Name:

Address:

Post/Zip Code:

Day Time Tel. No.

# Smart Address Version 3.x Order Form

## Send your order to:-

Insight Software Solutions, Inc.  
P.O. Box 354,  
Bountiful, UT 84011-0354

Telephone: 801 295-1890  
Fax: 801 299-1781  
E-Mail: 71672.3464@compuserve.com

Please send me \_\_\_ licensed copy(s) of Smart Address Version 3.

I want the \_\_\_ 16bit Windows 3.x Version

(or) \_\_\_ 32bit Windows 95 / Windows NT Version

Price (US Dollars) Per Copy:-

Price	\$39.00
Utah Residents add Sales Tax	\$ 2.39
Shipping by First Class Mail	\$ 3.00
--- or ---	
Priority or Int'l shipping	\$ 5.00

-----	-----
Total	\$
-----	-----

I enclose a check / wish to pay by MasterCard / Visa / Amex / Discover (delete as applicable)

## Credit Card Details:-

Name as on card:-

Card Number:-

Expiry Date:-

## Please send the licensed version to:-

Name:

Address:

Telephone Number:



## Ordering Smart Address

### [Order Form](#)

You can print this order form by using the "Print Topic" option from the "File" menu, or use Copy and Paste to copy it into a Word-Processor if you want to fill it in on-screen.

When you purchase Smart Address, you will receive:

- A licensed copy of the latest version of Version 3 of Smart Address, without the evaluation reminder screens. Whilst we always try to ship as quickly as we can, by Air Mail if outside the UK, please allow 21 days for delivery.
- A free CD containing evaluation versions of all our other software and a number of other company's that we think you might be interested in. The CD has a simple to use Windows-Based Browsing Program that gives complete descriptions of all the programs, together with their system requirements and screenshots of each one. A lot of the programs will run direct from the CD, to save you having to install them to try them out.

We can accept your order by mail, E-mail, Fax or Phone. You can also license single copies via the Compuserve SWREG service (GO SWREG - ID# 4521). Unless otherwise requested we ship a 3.5" disk.

*We also offer considerable discounts for multi-copy licences for use across networks, across sites or across corporations. Please contact us for details.*



## Ordering Smart Address

### [Order Form](#)

You can print this order form by using the "Print Topic" option from the "File" menu, or use Copy and Paste to copy it into a Word-Processor if you want to fill it in on-screen.

We can accept your order by mail, E-mail, Fax or Phone. Unless otherwise requested we ship a 3.5" disk containing a licensed copy of the latest version of Smart Address 3.x, and a **free** CD Rom containing the latest evaluation version of all the products from both Oakley Data Services and Insight Software Solutions, including a number of award-winning products.

*We also offer considerable discounts for multi-copy licences for use across networks, across sites or across corporations. Please contact us for details.*

## Problems Printing Envelopes ?

The Envelope Feed option box implies that you can choose any envelope feed position and direction and that will be how the envelope prints from the printer. This isn't exactly what may happen.

When you send an envelope to the printer, Smart Address tells the printer that the paper is an envelope (such as DL) and tells the printer what text to print and where to print it.

Most printers are pre-set to print an envelope a certain way. If the envelope feed option icon matches the way a printer physically feeds an envelope, then there is no problem. If the icon does not match, several incorrect results are possible. The printer may:

- Print the envelope the way the feed option icon tells it to.
- Print the envelope the way the hardware tells the printer to print the envelope
- Print the envelope in some unpredictable way.

Basically the feed option icon is used when you are trying to print an envelope size that isn't supported by your printer. If the envelope size is supported (see your printer documentation) then the feed icon and associated feed options (except orientation) are ignored, as the printer knows how to print supported envelopes. If however, the envelope isn't supported or is a custom sized envelope, then Smart Address attempts to fool the printer into printing the envelope correctly.

Smart Address does this by first checking with the printer that the envelope size being used isn't actually supported. If the envelope isn't supported, or is a custom envelope, Smart Address sends the envelope as the size of the paper currently defined to the printer (generally this will be A4 or Letter). In order to try and locate the actual output correctly to the size of the envelope being fed in, Smart Address tries to adjust the various printer margins to locate the text correctly.

Generally this approach works well, however due to the various ways differing printer manufactures code their printer drivers, almost anything could happen. It should be noted at this point that this isn't a Smart Address problem, the same problems are encountered and the same work rounds implemented, in all applications attempting to print envelopes, including Microsoft Word.

If however you are having problems in printing envelopes, please try the following:

- Print to a plain sheet of paper, trying the various Envelope Feed Icons and options to see where the envelope would have printed. From this sheet see if you can work out how the envelope should be fed into the printer to obtain a satisfactory result.
- Check with your printer documentation that the envelope being used is supported by the printer. If not, see if a supported envelope size prints properly.
- Check that you have the latest copy of the Windows Printer Driver for your printer and you are using it.

# Reminder Icons

When an event is displayed in the Reminders List, then various icons may appear next to the event. These icons are used to visually inform you of the current state of that event.

The icons that may appear are:



The Event is scheduled



The Event is overdue.



The Event is due today.



The Event is due within the next "x" days.



The Event is Complete



The Event is a Note Only



The Event has an Alarm set.



The Event is a future Recurring Event.

**E-Mail**

74774.1347@compuserve.com

**E-Mail**

74774.1347@compuserve.com

## **FAQ**

Frequently Asked Questions

**fax**

+44 (0)1270 765272



