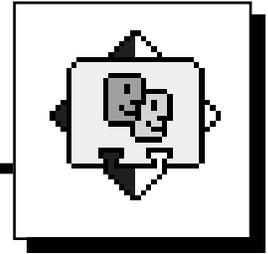


TouchBase Pro

Personal Contacts Management



TouchBase, the contact management software *par excellence*, has recently been upgraded to TouchBase Pro, and it sports numerous welcome new features. TouchBase has been managing all of the contacts for *Mac Monitor* for several years, so I was eager to test the new version. I wasn't disappointed.

TouchBase Pro lets you keep extensive information in an "electronic Rolodex" that goes far beyond the capabilities of its analog counterpart. You can store, retrieve, sort, and print out all of your business and/or personal contacts. TouchBase will even dial your phone for you — and log the action for a permanent record.

Unlike some contact managers, TouchBase Pro is based on a *structured database* concept. In contrast to free-form databases, such as QuickDex, each piece of information about an entry goes in its own field: first name, last name, street address, and so forth. The strength of this approach is that searching and sorting can be based on specific types of information — zip codes, for instance. Another benefit is that print merging is possible.

The new Pro version of the program is quite flexible, providing a number of pre-specified fields in addition to many that are customizable. In addition to the standard fields (name, address, phone number, fax number, etc.), there are eight customizable text fields, two date fields, two number fields, and four checkboxes. These can be given any name you like and formatted in various ways.

You can access your contacts in two views: List view and Detail view. In the List view, you can see four fields of information. It's your choice which four fields to display, and you can change your mind at any time. (See illustration.)

The Detail view presents you with complete information on a given contact, and it is in the Detail view that you initially enter your data. So much information is possible that the TouchBase authors have provided three variations on the Detail view. You can choose between these three views from the pop-up menu at the bottom of the TouchBase window. The first view shows the main information for each contact. (See illustration.) The next view, called Custom, shows additional fields, most of which are customizable. If your contact has eight different phone numbers, TouchBase Pro can handle it, but other possibilities are Spouse name, America Online address, or anything else you might need. The third view is called Notes, because the Notes field, which is visible in both of the other views, expands to fill the window in this view. The Notes field is a scrolling field which can hold several pages worth of text.

Heads Up

In any Detail view, a Header area appears at the top of the TouchBase window. The header can also be customized to show whatever information you deem useful. You can even have several different headers, and switch back and forth between them at will. In addition to normal fields, you can put text or graphics into headers. Formatting a header is easy. I've typed a few shortcuts into one of my header views to remind me of some of the searching shortcuts.

Getting information out of TouchBase is a snap. Pressing Command-L copies the mailing information (label) to the Clipboard, from which you can easily paste it into a word processor. You'll want to enter the data into TouchBase first; it's easier to get the formatted information out of the program than to get formatted information into it.

Searching can be done on any field, but TouchBase provides shortcuts for the most common. The results of a search can be put into a new subset or appended to a previous subset, and you can elect to search within a subset. There are even more sophisticated ways to search, which we'll look at later.

Getting it on paper

TouchBase Pro really excels at printing. There are seven types of printouts available: a detailed form, envelopes, address books, mailing labels, listings, Fax covers,

and FastLetters; and all of these forms are customizable. For envelopes, for instance, you can store multiple return addresses (including graphics) as well as many different templates (different sizes of envelopes, with and without return addresses, with and without barcodes, and with any font and style combination you like). I have separate templates for different aspects of my life: personal, *Mac Monitor* editor, SCAD professor, etc.). If your Mac is used by different people, each can have his or her own return address. Switching between these at print time is quick and easy.

The Pro version of TouchBase has streamlined the printing process by allowing print "buttons" in the Header area for common types of printing jobs: detailed forms, envelopes, Fax covers, and FastLetters. (More about that last one later.) I was disappointed that there can be no such button for mailing labels, one of my most often-needed print options. This is a minor inconvenience, however; using the standard print command gives me all seven of the print options.



continued →

TouchBase Pro (continued)

Beyond the addition of the print buttons in the Header area, however, ease of printing has not changed. Even if you *always* print envelopes with the manual feed option, you still have to choose that option each and every time you print.

One minor inconvenience remains: after creating a new contact, it must be saved before it can be printed. Unfortunately, saving it closes the Detail view, returning you to the List view, and you must then scroll to the end of the list in order to select the new entry before you can print it.

Despite these small shortcomings, though, the print functions are excellent. Many templates are provided for sundry purposes. If you want to print an address book in Daytimer, filofax, or DayRunner format, the templates are there, as are templates for Avery and Dennison labels. You can even print Rolodex cards, to complete the analog/digital circle.

Quick! Take a letter!

One great new feature is FastLetter, TouchBase's built-in word processing module. To use this feature, simply select a contact and click on the FastLetter button in the Header area at the top of the Detail view. You'll immediately find yourself in a mini-word processor, with the mailing information, date, etc. already filled in. Between the "Dear <first name>" and the "Sincerely," your cursor will be blinking — just waiting for you to type in the body of the letter.

FastLetter supports fonts, styles, tabs, justification, margins, and indents. You can create any number of your own FastLetter templates. A Fields menu is available for printing any TouchBase field.

This is the fastest and easiest method I've found for generating correspondence. The only thing I miss is the ability to use a graphic letterhead.

Keeping Track

Automatic logging of activities is a great help. If you dial someone or print a letter from TouchBase, an entry will be placed in the Notes field, showing the date, time (optional), and type of activity — including the phone number dialed. Of course, you can manually add whatever comments you like in this area. Clicking on the clock icon inserts the time and date at the top of the field.

Multiple Files, Multiple Personalities

Multiple files can be opened at the same time — a great help. Also, if you have more than one Mac, there are two built-in methods to reconcile TouchBase files from your PowerBook with those on your desktop Mac.

You can check for duplicate entries using whatever criteria you specify. Once found, TouchBase has a wonderfully intuitive way to swap fields back and forth in order to resolve any unwanted differences, or to simply put all of the information into a single entry.

There are many other new features in this version, too, including the following:

Data entry, always simple and intuitive, is even better now. Fields can be automatically formatted to your needs: phone numbers, zip codes, and initial caps for text fields. You can also add shortcuts that let you choose from a predefined pop-up list of choices. Typing an abbreviation will expand it into the full entry, and another option instructs TouchBase to add a new entry to the pop-up list. A nice touch.

Compound searches (Boolean logic) can be made, and search criteria can be saved. In fact, after defining criteria, you can even have TouchBase perform a compound search and then sort the results — all with a single menu command.

Sorting can now be done in two ways: fast (but temporary) or permanent (which really isn't all that slow). Earlier versions of TouchBase required you to use a separate application to permanently sort a file. The new method is far superior. Sorts can be performed on up to three fields.

A **Global Replace** feature has been added which can help you to update multiple contacts in a single step.

Network users will be happy to know that TouchBase supports multi-user data files which can be accessed over a network.

Import and export from

many Mac applications, such as Excel, FileMaker, HyperCard, and Microsoft Word. Dynodex and Address Book Plus can be imported automatically. You can even export to a Sharp Wizard.

Conclusions

As you can see, TouchBase Pro has a lot to offer. But we've only covered half of the story here; one of the more interesting aspects of TouchBase Pro is its integration with DateBook Pro. We'll look at that aspect next month when we review DateBook Pro. Stay tuned. Even without calendar integration, TouchBase Pro is the best thing we've encountered for keeping track of contacts. The interface is smooth and intuitive, but there's plenty of power packed into all of the customizable features. We can happily recommend this one.

Jim Alley

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TouchBase Pro

Aldus Consumer Division
(previously After Hours Software)

List price \$79; street price \$49

(TouchBase Pro/DateBook Pro Bundle retails for \$149)

Watch for a DateBook Pro review in an upcoming issue.

