Total Contact Management
+ Workflow System

Installation & Instruction Manual

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Guided Tour & System Overview

TCM is ideally suited to both business and home use. Although it boasts many powerful features it is easy to understand and use.

- TCM is ideal for filing household and personal documents such as bank statements, telephone bills, receipts, guarantees, warranties and personal correspondence etc.
- With your scanner you can turn TCM into a virtual photo album- just scan in your photos and file them in TCM and if you have a digital camera you can file the images directly into TCM provided your camera supports file transfer.
- If you have children then TCM is invaluable: not only can you keep a record of their school reports, but the children themselves can use TCM to file their homework, and will be able to remind themselves when it is due. As they use TCM they will also learn how to organise themselves - essential for their future careers.
- TCM is ideal for Students who want to keep records of course notes, hand-outs, photocopied information and also copies of their own work.
- Collectors can use TCM to catalogue and annotate their collections e.g. video collections or audio CDs - just scan in the covers, annotate, and file them away.

TCM can be used to efficiently keep records for any clubs or societies in exactly the same way as a business would.

Using TCM Effectively.
In order to get the most out of TCM, it is recommended that you use it as it was intended; as a "Workflow System". While it is perfectly possible just to use TCM as a simple filing system, you will get the most out of the system if you take the time to enter your contacts and their details into TCM and then use it every time you make contact with them. On the telephone, by E-mail, fax or letter, you will soon develop an invaluable database of every call, every letter and every file connected with them.

Your Filing System - The Move To Electronic Filing

The key to using TCM effectively is having the right filing structure. Before you start using TCM it is well worth taking time to think about what your requirements for a filing system are and how these might change in the future, then devising a system based along these lines. If your existing paper-based system works well at the moment, it may be beneficial to simply transfer it onto your computer where it will work more efficiently, carrying out a review as you do so. This method not only gains the benefits of a computer filing system, but also personnel don't have to relearn a new system and it can be integrated into your business with the minimum of disruption.

TCM - Document Management in Action.

Once you have decided on your filing system, and have created the necessary folders and subfolders, the first step in using TCM in a business environment is to start filling these folders with the names and addresses of your contacts. This way you can then scan in documents relating to them later on knowing that you have folders ready to put them in, rather than have them sitting in your Document Pending File waiting to be linked. This methodology provides you with the full power of TCM. TCM's flexibility, however, means that you can store any kind of document or Windows type file simply by linking to a folder.

TCM – Contact Management Made Easy

Once you have entered your contacts into TCM, you are now ready to call them and you are prepared if they call you. To get the most out of the TCM telephone call module and our Template Technology, you should, again, think what your business requirements are. If your company makes or receives a lot of calls of a similar nature then you will known what sort of topics are covered and the responses which are made. To take an example: If your company sells widgets and you do a lot of telesales, then your main responses when calling somebody will probably fall into a number of categories:- either they will be interested, they will not be interested, or they will already have widgets. Once you have worked out the responses, then you can create a Template with these responses on it so that all you have to do is to press a Template button to record the appropriate comment, this will save you time, and make the logging of calls easier to follow. Two default templates are pre-installed with TCM, which you can use or edit to suit your requirements or you can create new Templates with the Template Wizard.

Contact Management

TCM keeps track of all your incoming and outgoing telephone calls. Before you start your call, click on the outgoing call button and search for the contact. Now when you start your call to the contact you will have all their earlier correspondence in front of you. The information you will see on screen will be the last item linked to the contact, be it a telephone call, scanned image, word-processed document, spreadsheet, etc. To move through the earlier correspondence click on the drop down list and choose the item you wish to view on screen.

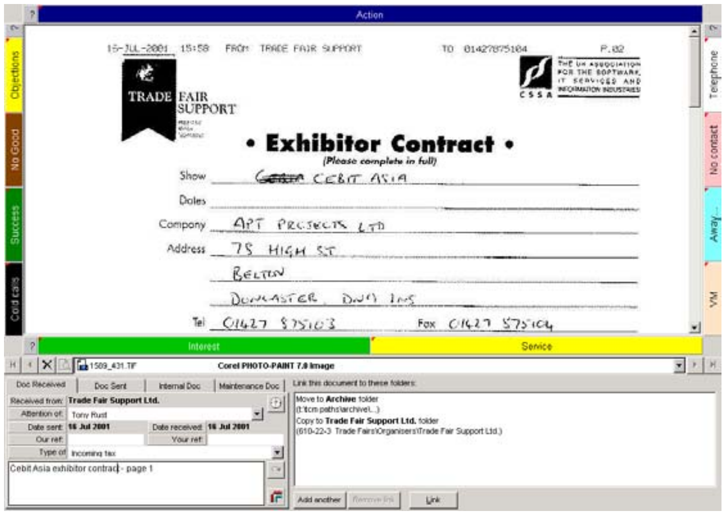
Once you have started talking to the contact make notes in the area provided at the bottom of the screen. In the example above you can see that a document that has been linked to the contact you are calling, appears in the call screen.
If you ensure that you make a record of all your calls, then when you are not sure about what the contact said, you will have a record of the conversation that you can always refer to.

Electronic Filing

TCM has a very powerful and easy to use electronic filing system. The concept is that all files and documents pass through a pending tray and then through the Linking process into the Main Filing system.

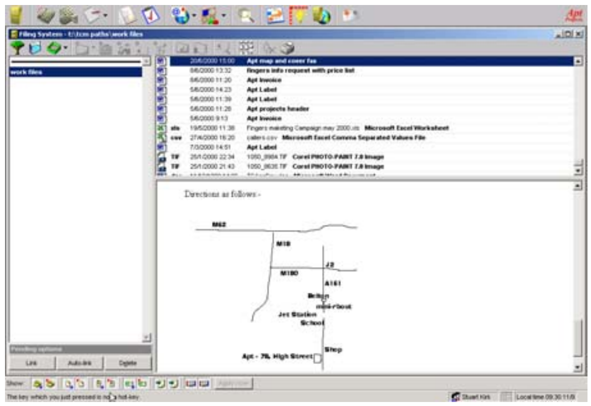
When you have chosen which item in a pending tray you wish to link and have clicked the Link option you wish to use you will be taken to the linking screen.

In the main area of the linking screen you will see the image you are about to link, at the bottom of the linking screen you will see space to annotate the item before it is linked.
Note: if you are linking a document, spreadsheet, etc you will see the filing properties for the file instead.



Document Management

To keep a track of any of your documents that you create on your computer save them directly into the 'Work Files' tray. When the document is finished you can then link that document to the contact it is intended for. To link the document, click on the Work Files pending tray button on the toolbar. A list of items in the Work Files pending tray should now appear in the right hand window. From the box in the lower left hand window you now make the choice of what item/s you wish to link. To link all the items (one at a time) choose the 'Link all' option, to link just one document, highlight the item you wish to link and then choose the 'Link one' option.



To view the document you wish to link, just double click on the document in the pending tray that holds the item you wish to view. The application the document was created in will open up and show the document on screen.

Any documents that you scanned in to TCM will appear in the scans pending tray. You can view these as thumbnails by clicking on the thumbnail button on the filing system taskbar or as a full screen image by double clicking on the item in the scans pending tray. If you are already viewing the items in the Scans pending tray as thumbnails just double click on the thumbnail to see a larger image (Note: You can zoom in and out of the image by moving the slider bar left and right on the zoom control bar).

To view the image as a thumbnail double click on the larger image. You can print the document from this large view by clicking on the button showing the printer, located above the zoom control bar.

To get the most out of TCM always store your computer files in the Work File pending tray, and then once the document is finished, link it to the correct contact.

Installation

Before installing TCM make sure that your computer system meets the minimum specification to run TCM.

- Microsoft Windows 98/NT4 or 2000
- Pentium P166 or higher processor
- 32 Megabytes Ram (64Mb or higher recommended)
- 15 – 120 Megabytes available Hard disk space (depending on TCM system packages)
- Mouse Required
- CD ROM Drive Required
- Internet Browser
- Scanner (optional)

Before proceeding with the installation close down all running applications. Place the TCM CD into your CD ROM drive.
Click on the 'Start' button and from the menu that appears select the 'Run' option.
In the run prompt box enter:

X:\setup

Where 'X' is the letter for your CD ROM drive.

Click on the OK button that will have become available.

Follow the instructions that appear on screen, take your time to read the instructions to reduce the possibility of problems later during the installation of TCM.

Once the installation is complete you will be offered the chance to register your product on our web site, by telephone or e-mail. You must register your copy of TCM to ensure you receive technical support.

Network Installation

Basic Installation Information

When you install TCM on a network, you need to make sure that all the necessary library files are installed and registered on every workstation that is going to use the TCM program. Library files are system DLL's and OCX's which need to be present on each workstation if Windows is running locally.

Network administrators often have network utilities that are able to deploy an application onto the workstations without the need to visit each machine in turn. If you have such a utility, it should be able to install TCM without any problems as TCM does not use any proprietary installation techniques – the installation program is based on Microsoft routines. If you do not have the ability to do this, read on!

The simplest way to install TCM on a network is to manually copy the entire CD onto the server, and then run the setup routine from this copy. This will allow you to visit each workstation in turn (if necessary) and install the program from a central location. The alternative is to visit each workstation with the TCM CD. When you are prompted for the target directory, you can either install the program locally, or elsewhere on the server. Installing back to the server is the better solution, because it makes upgrading the program easier when there is only one file to update. Similarly, when the setup routine prompts you for the target of the TCM filing system, you should point it back to the server data drive where you intend to store your electronic filing system.

However, if you have notebook or portable computers for your workstation machines, you should install the program to the machines hard disk so that you can use the system when you are disconnected from the server.

Notes
The TCM program does not lock itself exclusively for a single user access, so a copy of the program on the server can be used by multiple users. TCM does lock some files during certain operations, such as when adding to the main index. In these instances, the program will make several attempts to access the locked file before reporting the problem, during which time the file may have unlocked. TCM keeps file locking down to a minimum to avoid these problems.

Administrator Privileges

Pending trays

One of the special privileges available to the TCM administrator is the ability to check each user's pending trays to make sure that the work allocated to them is being done. This option is only available to the administrator, and only if the system is configured so that the users have their own personal pending trays. Configuring the system in this way is described below.

When you set the filing and pending tray paths in TCM, you need to be aware that these settings are global – every user will see the same paths when they use the system. In the case of pending trays, this presents a problem – each user will want to see the contents of their own pending tray and no one else's. This is especially true of the Work Files pending tray, where users should be encouraged to store word-processed documents, spreadsheets and so on, which they then take the responsibility of linking to the relevant contact.

Global Pending Trays

If your workstations don't have local hard disks, or you don't want users to have access to local drives, then you must configure your pending trays to point to the server. If your system is configured in such a way that each user has a private area on the server which is accessed via a common drive letter (drive U, for example), then you can set the pending trays to look at a subdirectory of this drive (E.g. "`u:\TCM Paths\Pending Work Files`"). Each user will then have a private pending tray.

As for a local pending tray configuration, the administrator can now log on and view the contents of each pending tray, provided that his computer has drive mappings to each U drive folder. For example, mapping the administrator's drive F to `u:\users\frank` will allow the administrator to view Frank's pending tray. Once again, this imposes an artificial restriction of 26 possible connections on the administrator's machine.

Tip: If you use Microsoft Word or Excel, you can configure them to save new documents into the TCM pending tray as the default folder. This option is accessed via Tools / Options / File Locations

Local Pending Trays

You can configure TCM to look at the local hard disk on every workstation for the pending tray files. This allows each user to save their work locally and then link it into the system, without the complication of seeing everyone else's pending files. Of course, you can configure the system so that some pending trays are local (such as Work Files and Internet Pages), and others are global (such as Scanned Images) by specifying local drives or network drives for the pending tray paths.

To create a system whereby each user can save files locally, you need to create pending tray folders on each local hard disk and make sure that they have the same name on every machine. For example, "`c:\TCM Paths\Pending Work Files`". You can then set the Work Files pending tray in TCM to look at this path, and because the setting will be adopted by every user it will point to every local hard disk.

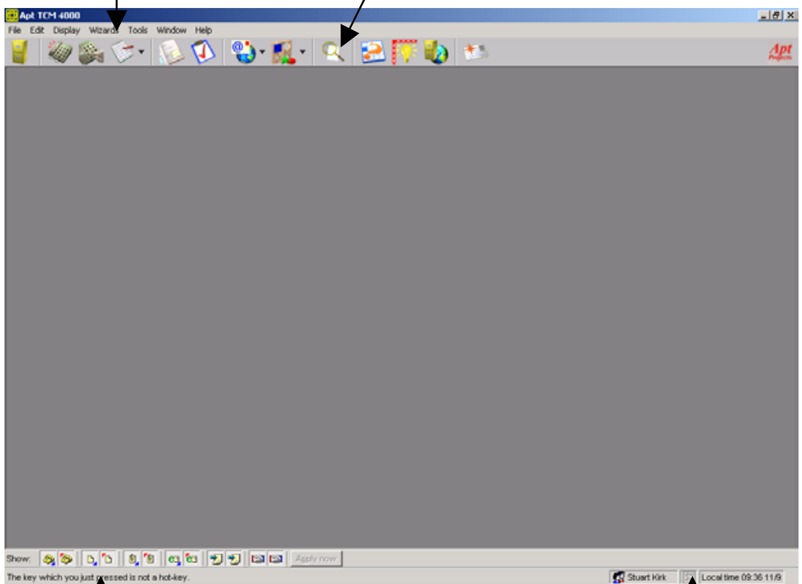
The administrator can now log on and view the contents of each local pending tray, provided that his computer has drive mappings to each user's machine on the network. TCM polls through each mapped drive in turn, and if it finds a local pending tray on that machine it will display the name of the user for that computer and allow the administrator to view the contents of the pending tray on that machine. Because TCM requires each machine to be mapped with an individual drive letter, this imposes an artificial restriction of 26 possible connections (A to Z) on the administrator's machine.

TCM

The TCM main screen areas are:

Menu bar
Gives you access to all the functions available within TCM

Taskbar
Here you will find the buttons to access the individual modules in TCM and also the buttons to start the TCM Wizards.

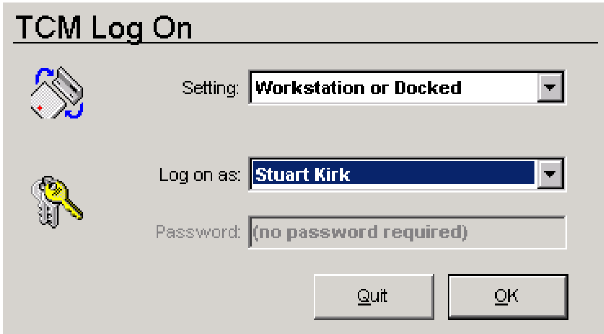


This area of the status bar displays information that is relevant to the module you are using.

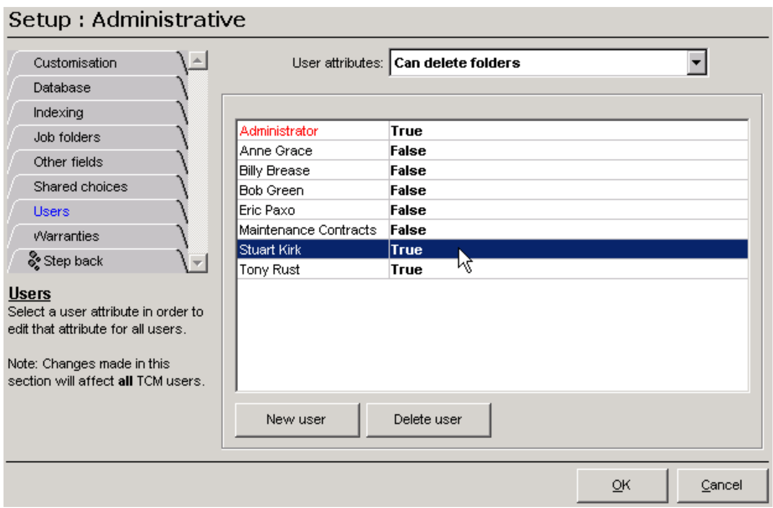
This area of the status bar shows you the date and time in your native country as well as other countries around the world whose time you have chosen to display. Double-click on the clock to choose the countries of your choice.

Creating New Users

The TCM administrator is the only person who can create new TCM users. To create a new user, log on as the administrator and enter the administrators password, if you have given the administrator one (highly recommended), and click on the OK button.



Once logged into TCM click on the ‘File’ option from the TCM menu bar and select ‘Setup’. When the Setup screen appears select the ‘Administrative’ option and then click on the ‘Users’ tab. Click on the ‘New user’ button and when the ‘Add a new user’ box appears enter the new TCM users name. Once you have entered the new user you will have to select the TCM settings for the new user. Using the ‘User attributes’ drop list select the item that you want to setup for the new TCM user and alter the settings for that item if they need changing. For example if you want to give the new TCM user the rights to delete TCM folders select the ‘Can delete folders’ option from the ‘User attributes’ drop list. The new TCM user name will appear along with the other TCM users on your system. To the right of the user name you will see the word ‘False’ this means that at present the new TCM user doesn’t have the rights to delete any TCM folders. To give the new user the rights double click on the word ‘False’ and it will change to ‘True’. The user will now have the rights to delete folders from the TCM filing screen.



Deleting a TCM user

To delete a TCM user highlight the TCM user that you want to delete in the Setup\Administrative\Users screen and click on the ‘Delete user’ button. A box will appear asking you to confirm that you want to delete the user you have selected. Click on the ‘Yes’ button to confirm, click the ‘No’ button to keep the user. Please note that you cannot delete the ‘Administrator’.

TCM Menu Bar

File
This menu gives you access to the TCM settings menu, for more information on the settings menu see the TCM Setup Options manual. You can also log off as the current user from this menu.

Edit
Use this menu to relocate folders within the TCM Filing tree.

Display
Here you select between the Standard and Advanced display modes and choose which items you want to see on screen. Options to view on screen are the 'Toolbar', 'Status bar' and 'Filter bar'. If you are in the telephone call screen or linking screen you will also have access to the 'Template' option from the menu.
Note: If you switch display modes you will need to restart TCM.

Wizards
This menu gives you access to the wizards that make TCM easy to use, check out the 'Wizards' instructions for details of each wizard. The 'Wizards' available in TCM are the 'Import Wizard', 'Scanning Wizard' and the 'Template Wizard'. Other Wizards are available to complement TCM, see your local supplier for more details.

Tools
The Tools menu gives you access to components that will keep TCM running efficiently. There are Validate, Compress To-Do databases and Backup tools to look after your data. There is also a utility that allows you to check the current version numbers of the TCM files you have installed on your system.

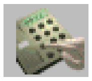
Window
From here you can open the various modules and also switch between the different modules if you have more than one module open.

Help
This menu option gives you access to the on-line help and Internet help.

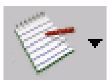
Modules (available from the TCM Taskbar)

Filing System
Click on this icon to open the Filing System. Opening the Filing System will show the TCM Filing Tree and also the Filing Tree toolbar which gives you access to the TCM pending trays.

Incoming Call
This icon is for incoming calls. As soon as your telephone rings click on this icon. You will be able to view the contact's earlier communication and review it on screen as you talk.

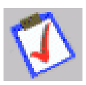


Outgoing Call
Click here when you want to call a contact. Have all your earlier correspondence and phone call notes with your contact on screen while you talk to them.



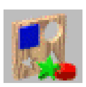
Notes
Click here to open the 'General notes' screen. Use the drop list to select to open the General notes, Meeting minutes notes or telephone call screens.

Diary
By clicking this icon you gain access to the diary. In the diary you will see all telephone calls, documents linked, and reminders entered for each day.

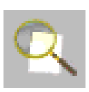


To-Do list
Click on this icon to create new To-Do's and to manage your TCM To-Do and Customer service management To-Do lists.

E-mail
Click on this icon to view the TCM E-mailer. The E-mailer is used for send and receiving, and crating new e-mails. See the E-mail manual for more information.

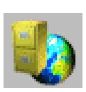


Tables
Use this icon to view various TCM data in table format.

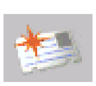


Search
Clicking here will bring up the search screen. Enter at least two characters from the contacts name and then click on the green traffic light or press the enter key on your keyboard to start the search.

On-hold puzzle
The On-hold puzzle is a 'sliding tile' game which you can amuse yourself with while waiting for the contact to answer your call.
You can change the picture on the tiles by right clicking on the empty tile space and choosing a new picture from the menu.

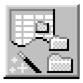


Website Administration
Click this icon to upload your published TCM internet pages to your web site.



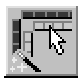
Quick new contact
Click this icon to quickly add a new contact to your TCM system.

Wizards



Import Wizard
This wizard takes the pain out of importing your existing database into TCM. If you already use a contact manager then we have also made it easier for you to import your data. Please refer to the Import Wizard manual for detailed instructions about importing your database data.

Scanning Wizard
Use this wizard to help you scan in any documents, magazine clippings, photos, school reports etc. For a detailed run through of the scanning wizard please refer to the Scanning Wizard manual.



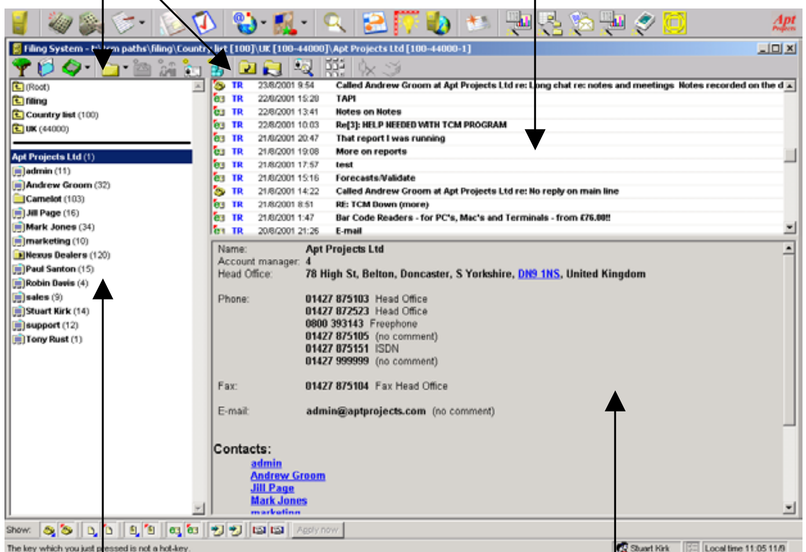
Template Wizard
Create your New Template quickly and easily with the Template Wizard. This wizard will save you time and money when you are making calls to your contacts. Refer to the Template Wizard manual for detailed instructions.

Filing Screen

Click on this button  to open the TCM filing screen.

This is the filing system toolbar.

This area is for viewing the contents of the folder that is highlighted in the left window.

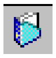


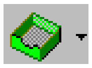
This area of the filing screen shows all the folders in the filing tree. When you expand a folder a black line will appear showing above it the path to the folders that you can see below the black line.

Here you will see the details for the company, contact or asset that is highlighted in the left window. If you click on an item in the company, contact or asset folder you will see the whole telephone, e-mail or service management call message, scanned document or information about a document or spreadsheet.

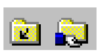
Filing System Toolbar


Main Filing Tree
This icon gives you access to the main filing tree.


Archive
Click on this icon to view the daily archive folder

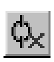

Document Pending Trays
This icon gives you access to the various pending trays where your files are stored before they are linked. The arrow to the right of the icon drops a list showing the various pending trays. These are Scanned Images, Faxes, Publishing, Internet Pages, Work Files, Mail-merge, Overlays, Video and Voice, and New Contacts.


New Folder buttons
From these buttons you create the five different types of folder that are available in TCM. The five types of folder available are Normal, Company, Family, Contact and Asset folders. These buttons are available when you highlight a filing cabinet or folder in the filing tree.


Sharing and Include buttons
Use these buttons when you want to share or include the items from one folder in the filing tree with another folder. Available when you highlight a folder in the filing tree.


Company/Contact Details
This is where you view or edit the details of a Company, Family or Contact.


View image button
This button allows you to see Tiff/Bmp/Jpeg/Fxr and Fxd images in a folder as thumbnails.
When you click on this button you will be taken to the Image Window which will show all the images as thumbnails.


Unlink options
If you make a mistake when linking a file and need to unlink the item from a folder or contact, first locate the folder or contact where the item was mistakenly linked and then click on the above button from the toolbar. In the lower left window a panel will appear with two buttons. To unlink one item, highlight the item you wish to unlink and then click on the 'Unlink one' button. To unlink everything in the folder click on the 'Unlink all' button. When you unlink an item from a folder, the unlinked item is placed back into the 'Work Files' pending tray from where you are able to link the item again.


Print
When an item or selections of items have been highlighted in a TCM folder use this button to print the item(s) out.

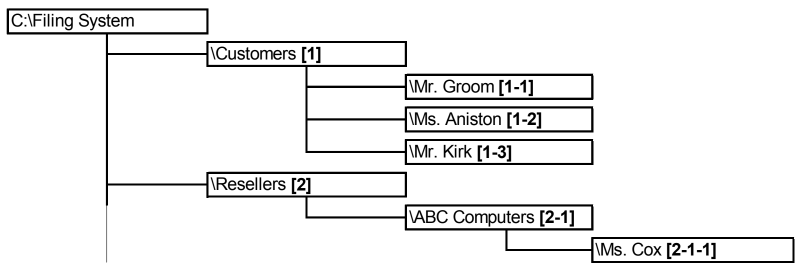
Filters
You will see the 'Filter' buttons in the lower left corner of the main TCM program screen. You can use these to filter out items from a contacts folder that is highlighted in the filing screen or diary page.
You select the items you want to see by depressing each button in turn by single clicking on a filter button with the left mouse button. When you have chosen the items that you want to view click on the 'Apply now' button.

TCM Filing Basics

TCM makes full use of the Windows filing system for storing your data, rather than holding everything in one large data file. This has several advantages:

- Less prone to data corruption
- Easier to do selective backups
- Enables archiving of old data

To achieve this system, TCM relies on the folder structure in Windows being correct because it uses the actual folder names like fields in a database. When you create a new folder in TCM, it is allocated a unique folder number based on the folder number immediately before it in the hierarchy.
In the example above you can see the folder hierarchy in action.
Each folder ends with a reference number; a filing reference of sorts.



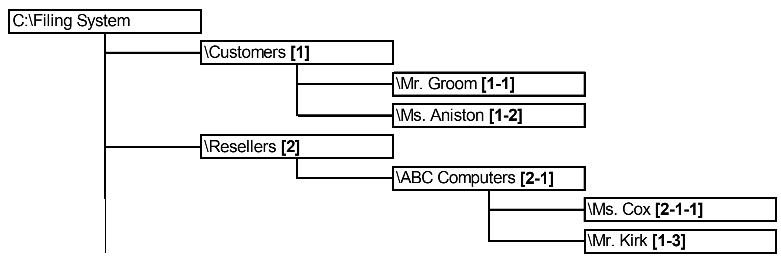
Each folder in the tree **must** have a unique number for the system to work, and the folders **must** retain their hierarchical structure with the correct numbering. If you wish, you can specify the reference numbers at the time you create the folders, and have your TCM electronic filing system mirror your existing paper-based system.

For this reason it is **<u>not possible to move folders around using Explorer</u>**, because the hierarchical nature of the numbering system will be broken. The Relocate feature in TCM will perform any folder movements that you may want to do, and alter the filing references and index accordingly.

Moving Folders

No matter how well you plan your filing system at the outset, you will probably need to move contacts and companies between folders at some stage. A typical example would be in a sales environment, where a lead may be entered into the filing system as a prospect, then moved into a folder for customers once a sale has been achieved.

It is important that you resist the temptation to move contacts around in Explorer. Although this seems like a natural operation given the folder-based nature of the TCM database, it will corrupt the folder reference hierarchy. In the example below, Mr. Kirk has been moved into the ABC Computers Company using Explorer, and you can see that his filing reference number (1-3) has not changed to (2-1-2). This will cause problems for TCM, which locates folders using the parent – child relationship of the folders.
If you perform the same operation using TCM's relocate feature, it will automatically renumber the folder and update the index to reflect this change. The relocation function also takes care of any sub-folders that may exist within the folder being moved.



The relocate feature is available when you right-click on a folder in the TCM Filing Cabinet screen. The Relocate (Cut) feature identifies the folder to be moved. You then right-click on the target folder and choose Relocate (Paste). After TCM has established that pasting the folders into the specified target will not exceed the maximum folder length set by Windows, it will perform the relocation.

Moving the Entire Filing System

If you need to relocate the entire filing system onto a different drive, for example, you do not need to use TCM for this. You can simply copy the entire filing tree using Explorer. The only proviso is that you must move the entire tree, and you must move it into a subdirectory of the target drive – not the root. You should also check that the target location will hold the entire tree to its furthest branch, which will by definition have the longest folder name. For example:
C:\Filing System\Customers [1]\United Kingdom [1-1]\North England [1-1-1]\ABC [1-1-1-1] …

The entire filing path shown above must be less than 255 characters in total, which is the limit imposed by Windows on a file path. Copying this folder into a target called D:\Public\Technical Support\Filing System may cause a problem because it has a longer name than the source folder (C:\Filing System).

After moving the filing tree, you only need to change the filing path in TCM so that it is looking at the new source. There is no need to rebuild the Index file because the Index works on the filing reference numbers, rather than specific drive and path names.

As a general rule, if you are using Explorer you should not do anything to the filing system which could disrupt the order of the filing references. It is best to use TCM for all folder operations, including renaming folders, because it checks new folder names for length and validity before making changes to the system, which Windows does not do.

Important

- Do not try to include Windows folders within the TCM filing structure by copying with Explorer or other such utilities.
- Only form folders within TCM with the TCM New Folder buttons.

Paths Setting

Index	
Users	
Shared	
Template	
RADs	
Filters	
Letters	
Forms	
Filing	
Archive	
Scanned Images	
Faxes	
Publishing	
Internet pages	
Work Files	
Mail Merged	
Overlays	
Video and Voice	
New Contacts	
E-mails	
Tables	
Departmental letters	
My letters	
E-mail library	

Create a new folder

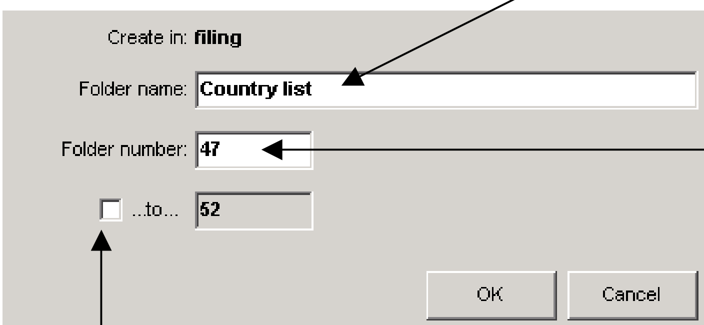
To create a normal folder

Click on the Filing System button  on the Filing taskbar.

In the filing tree choose where you want the folder to appear and then click on the  button from the filing system toolbar.

The **Add a New Folder** box will appear on screen.

Enter the Name for the New Folder in the space provided.



The new folder filing reference number will be automatically generated. (If you want to give the folder a new reference number, just delete the number already in the box and enter your own number taking care not to duplicate any number already used in the filing system.)

Tick this option box if you want to create more than one folder. Enter the range of folder numbers in the two boxes provided. In the above example 5 new folders will be created. The folders will all appear with the same name. To rename a folder, single click on the folder with the right mouse button. From the pop-up menu choose the 'Folder properties' option.

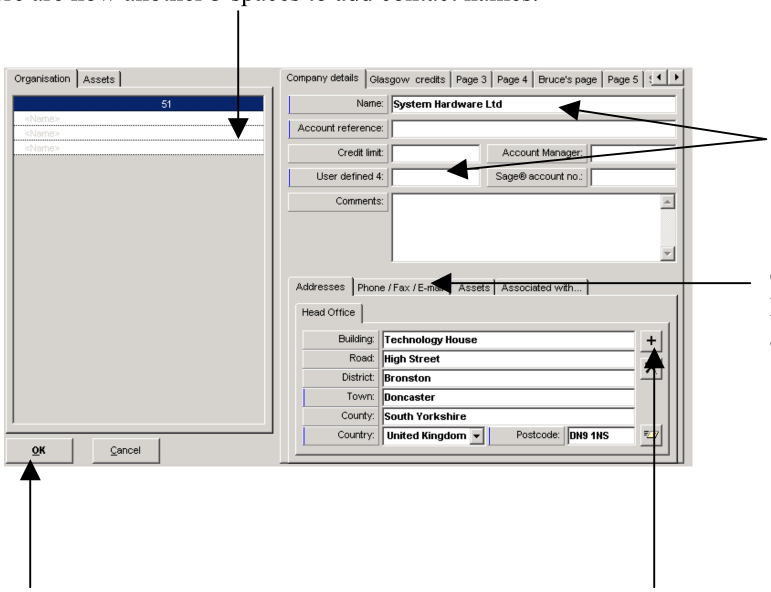
To create a Company/Family Folder…

Choose where you want the Company/Family Folder to appear in the filing tree and then click on the button for the correct folder type you require. The Company/Family Details screen will appear.

 Company Folder

 Family Folder

Enter the name for the Company/Family in the box provided and then click on the + button to enter the address. To add telephone, fax, etc numbers click on the ‘Phone/Fax/E-mail’ tab. To enter the names of contacts at the company or family click on the one of the white boxes that shows <Name>. The ‘details’ box will now change to let you enter the new contact’s details. When you have finished entering all the details click on the ‘OK’ button. Although there are only 3 <Name> boxes on the initial details screen, more New Contacts can be added by bringing the company/family folder details on screen again. You will see that there are now another 3 spaces to add contact names.



Fill in the spaces provided with the Company/Family Details

Click here to enter Phone, Fax numbers and E-mail addresses

Click the OK button to save the details you have entered for the new company or family.

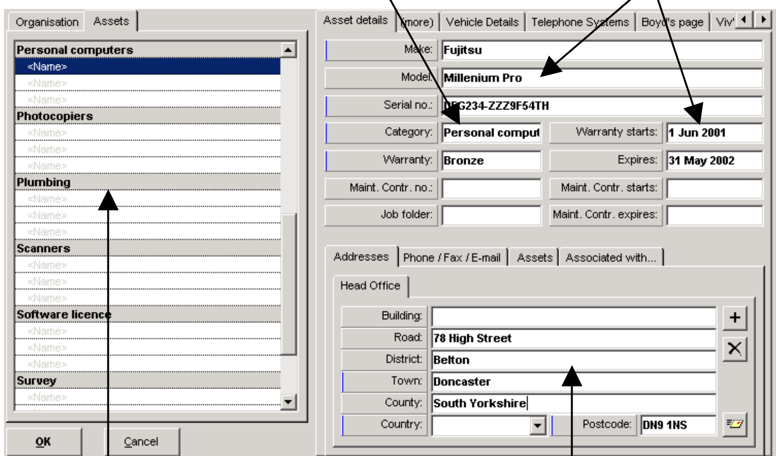
Click this button to add address details for the new Company / Family

Company Assets

To enter company asset details click on the ‘Assets’ tab. Select the type of asset from the ‘Category list’ and then fill in the details for the new asset that you are entering. Once you have entered the details for the asset click on the ‘OK’ button to save the details you have entered or fill in the details for other assets that you want to enter.

Select the Asset category here.

Enter the details for the asset in the boxes provided.



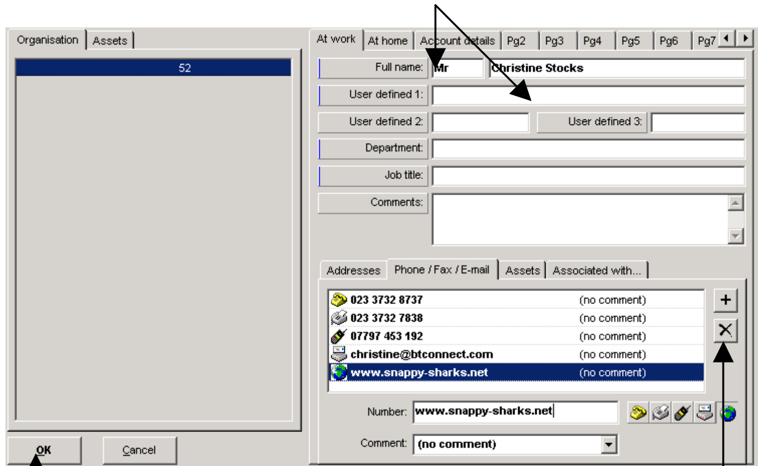
Any other assets will be listed here.

If the asset is located at another address then fill in the address details here. To enter an address for the asset click on the + button.

To create a Contact Folder…(for a single contact)

Choose where you want the Contact folder to appear in the filing tree and then click on the  button and the Contact Details screen will appear

Fill in the spaces provided with the Contact's Details.

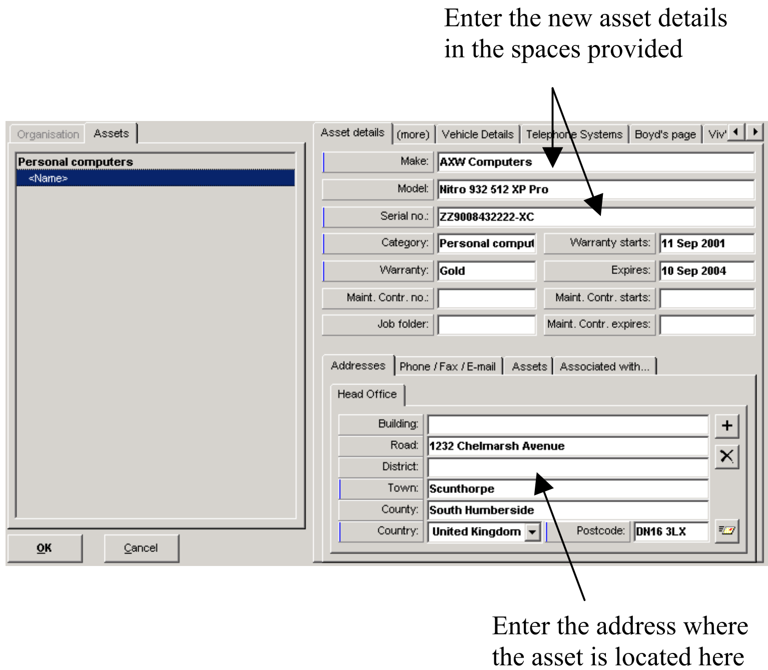


When you are finished click the OK button.

Use this button to delete a phone number or email address from the box.

To create an Asset Folder

Choose where you want the Asset folder to appear in the filing tree and then click on the  button and the New Asset details screen will appear



Choosing a folder in the Filing list

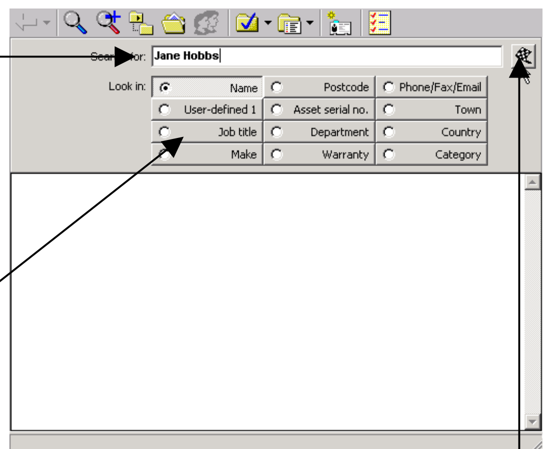
Either, Search *(Page 35)* for the name of the folder you are trying to locate
or, move through the filing tree by double clicking on folders until you locate the folder you want.

Above this line shown shows the filing path to the folder that is immediately below the line

Search for a contact…

Click on the  button on the TCM taskbar, which will bring up the search box.

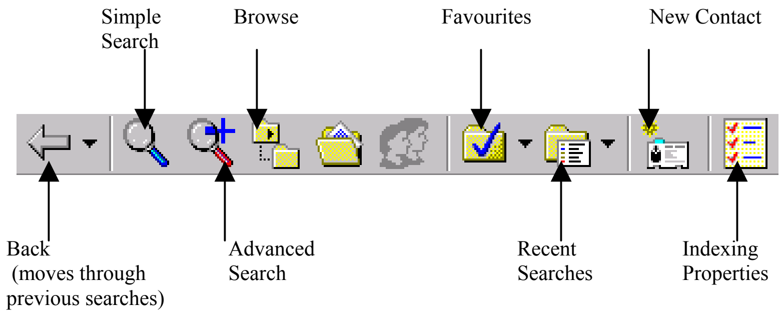
In the Find box type the name of the contact you wish to search for.



These buttons allow you to search on the TCM fields that you have built indexes for. Select which field to search on by single clicking

Click this button or press the enter key on your keyboard to start the search. This button will only become available once you have typed a search string into the search box.

Search box toolbar

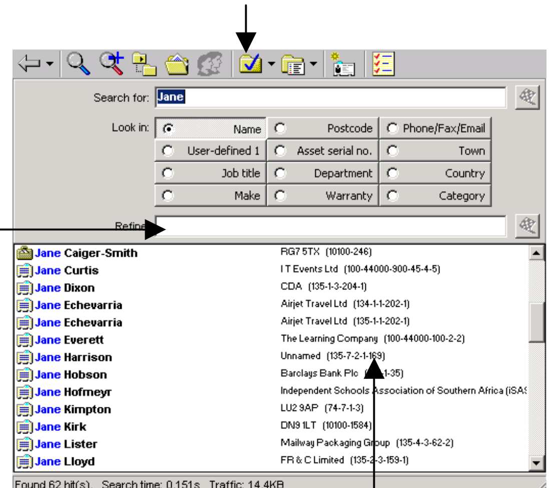


When the search results are returned the first contact in the list will be highlighted in red. If this contact is the one you are searching for press the enter key or single click on their name with the left mouse button. If the contact name you require is further down the list move the mouse pointer over the contacts name so that it is highlighted and then single click on the left mouse button. At the bottom of the ‘Find information’ box you will see how many items were found in the TCM database from the search string that you entered. If there are too many names it is probably best to ’Refine’ the list of contact names found. To do this type another search string into the ’Refine’ box that will have appeared and then click on the button to the right of the ’Refine’ box or press the enter key on your keyboard. The ’Refined’ list will appear at the top of the results separated from the earlier results list by a black bar.

Click on the ‘Favourites’ icon to search for the contacts you access a lot. (To add a contact to the favourites list, do a normal search then right click on the contact. Choose ‘Send to Favourites’ from the menu that appears.)

Search ‘refine’ box. Enter a text string here to shorten your results list.

Single click with the left mouse button on the relevant name in the search results box when it appears.



This is the filing reference that you can use to build a hard-copy filing system that will match your TCM electronic filing system

Write a letter

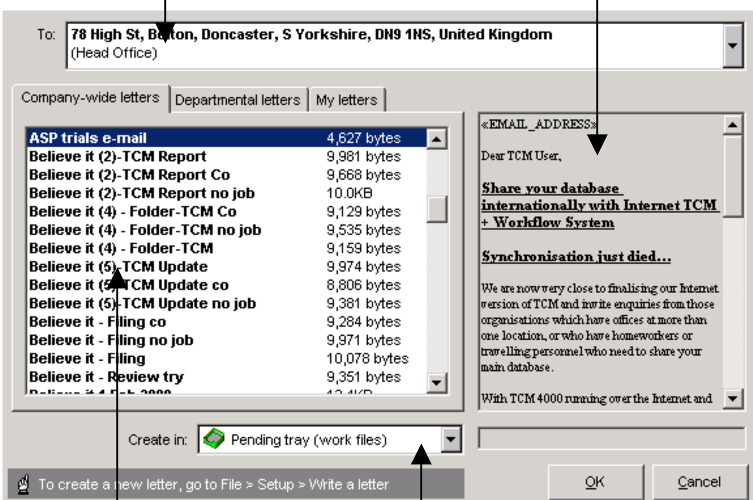
To write a letter to a contact in your TCM database, first of all search for the contact using the TCM search facility, once the results have appeared single click on the contacts name. Once you are at the contacts folder single click with the right mouse button on the contacts name. From the pop-up menu choose the 'Write a letter' option

The 'write a letter' screen will appear (*See image below*)

The top box of the 'Write a letter' screen will show the Contacts address, if the contact has more than one address, click on the down arrow to the right of the address box and from the drop down list choose the address where you want to send the letter. Select the letter you want to use and then click the OK button.

All the contacts addresses will be shown in this drop list.

The letter you select from the letter list box will be shown here.



Any existing letters that you have created will appear here.

The folder where the letter will be created will be shown here.

You will see two options available for creating your letter:

- Use the Microsoft® Word® letter wizard (if available)
- Use this Mail-Merge document

The first option, if available, will start Microsoft® Word® and will automatically start the letter wizard. For more information on using the letter wizard refer to the Microsoft® Word® help file.

The second option allows you to create a new letter, or use an existing one if you have created any previously. To create a new letter you must have a word processing package installed on your system, examples of these are Microsoft® Word®, Lotus® WordPro, Corel® WordPerfect, etc.

To use your word processing package to create/edit your letter, choose the ‘Create a new Mail Merge document’ by single clicking on it with the left mouse button. Click on the ‘Use this editor’ box to place a tick in the box, next click on the button showing the folder and locate your word processing packages ‘exe’ file. If you are using Microsoft® Word® the ‘exe’ file you are looking for is ‘Winword.exe’.

The ‘Create in’ folder box shows the folder where the letter you are creating will be saved. You can create the file in, either your TCM Work Files Pending Tray or the Contacts folder.
When you chosen your word processing package click on the ’OK’ button, this will start your word processing package running with a letter that you can edit. To insert field names from the TCM database into the document, click on the ’Insert Merge Field’ button that you will find on the Microsoft® Word® Mail Merge toolbar. If you can not see the Mail Merge toolbar, click on the ’View’ option from the Microsoft® Word® toolbar, on the menu that appears move your mouse pointer over the ‘Toolbars’ option, another menu will appear, from this menu click with the left mouse button on the ‘Mail Merge’ option. The Mail Merge toolbar should now appear.

Insert the merge fields that you require into your document and enter the text for the letter. Once your letter has been created you will need to save the letter in your TCM\System\Letters folder. You can make Microsoft® Word® do this by default by changing the ’Default working folder’ path.

To change the ‘Default working folder’ path search the Microsoft® Word® help file. The letter that you create must be saved as a ‘Rich Text Format (.rtf) file. When you save your letter give it a descriptive name so that if you want to use the letter at a later date you will have some idea of the letters content.

Once you have saved your letter into the TCM\System\Letters folder your letter will always be available to send to other contacts from your TCM database, or for use with the TCM Marketing Module that is available separately. The ‘Write a Letter’ screen will close down. Go back into TCM and then right click on the contact that you want to send the letter that you have just created to. In the existing letters box on the ‘Write a letter’ screen you will see the letter that you have just created. Highlight the existing letter by single clicking on it with the left mouse button, the letter will appear in the letter preview box, click on the ‘OK’ button and the letter will have been created. You will find the letter in the folder that was shown in the ‘Create letter in’ box.

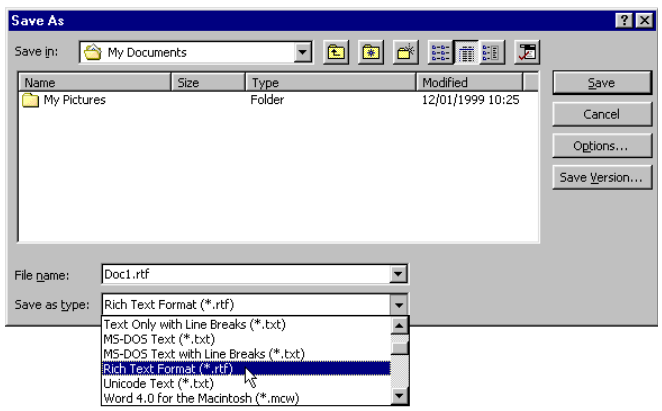
Important information

When you have created you master document, you must save it as an '.rtf' file. The reason for this is because the 'rich text format' is a widely used document standard.

The rich text format standard supports the following features:

- Tabs
- Hanging indents
- Different font styles
- Font formatting i.e. **Bold**, *italics*, underlined
- Font colours
- Images, as long as they appear on their own line

To save your document as an '.rtf' file in Microsoft® Word®, click on the 'File' option from the menu bar as click on the 'Save As...' option. The 'Save As' box will appear *(see below)*.



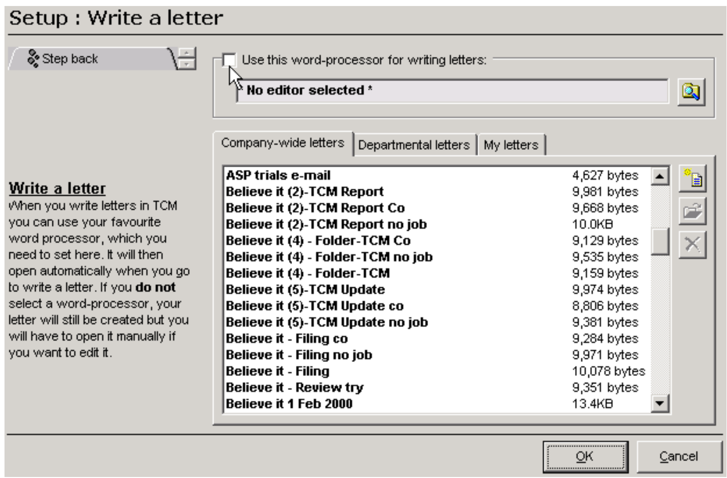
Give the master document a distinctive name so it will be easier to recognise what the master document refers to at a later date, and from the 'Save as type:' drop list choose the 'Rich Text Format (*.rtf)' option. Before clicking on the 'Save' button make sure the path to where the file is to be saved is pointing to your 'TCM\System\Letters' folder. If you don't save the master document to this folder, when you come to select the master document for the merge you will not see it in the list of documents available to use. Once you have set the path to where the master document will be saved and given the document a distinctive name click on the 'Save' button.

Microsoft® Word® 7 (Office 95 users)

If you are a Microsoft® Word® version 7 (Office 95) user you will experience problems when you try to use the '.rtf' document that you have created. The reason for this as that the .rtf document is unable to merge with the data source that contains that field data. This is a know problem with '.rtf' files created in Word® version 7 (Office 95).
To get around this problem there are two possible solutions:

- Upgrade to the Microsoft® Office 97 or later

- or, when you want to 'write a letter' to a contact from your TCM database, in the File\Setup\ Write a letter screen, untick the box that has the words 'Use this word-processor for writing letters' to the right of it if it is ticked.

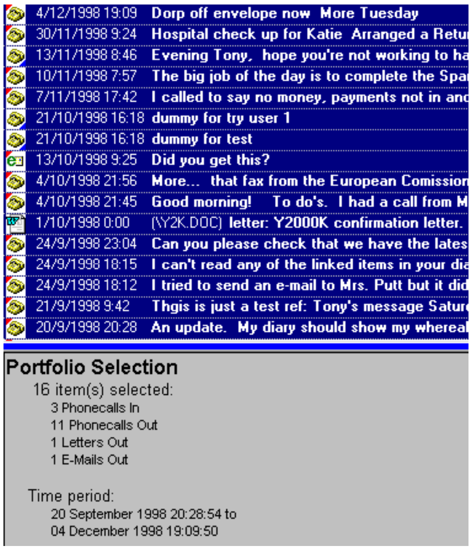


Make sure that the 'Use this word-processor for writing letters' box is **not** ticked and then click on the 'OK' button. The document that you have chosen to create will be stored in the folder which is shown in the 'Create letter in' box, this will be either your 'TCM Work Files' pending tray or the contact's folder, you can choose where to create the letter by clicking on the drop down list arrow to the right of the 'Create letter in' box. Once your letter has been created you can view it by going back into TCM and locating the letter in the folder or pending tray where the letter was created. To view the letter double click on it with the left mouse button, this will start up Microsoft® Word® and display the letter that you have just created.

Printing from a contacts folder

To print a single item from a contacts folder, first highlight the item by single clicking on it with the left mouse button. Next click on the printer icon from the Filing System Toolbar. The item that you have selected to print is sent to your printer.

If you want to print more than one item from a contact 's folder there are two ways of selecting the items you wish to print.

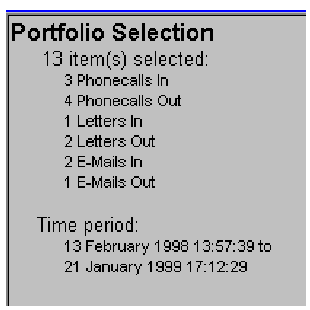


To choose a selection of items, single click with the left mouse button on the first item you wish to print, then whilst holding down the 'Shift' key on your keyboard, single click with the left mouse button on the last item that you want to print. The items that you have selected to print with be shown highlighted in blue

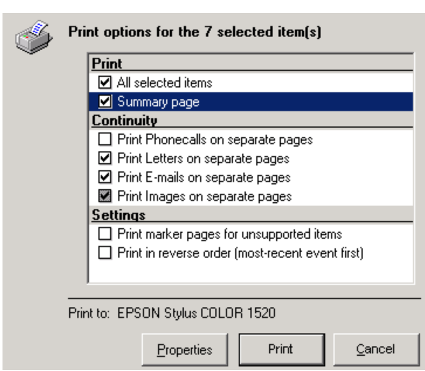
TCM will display the total number of items that you have chosen to print, and also a break down of each individual type of item.
You will also see the Time period for the items that you have selected to print.

To select individual items to print, single click on the first item to print with the left mouse button and whilst holding down the 'Ctrl' button click on any other items in the contacts folder that you wish to print.

Again, the individual items that you select will be highlighted in blue, You will also see the total number of items you have selected to print and also the individual number of each item selected. The time period for the selected items will also be shown.



Once you have made your selections click on the printer icon from the Filing System Toolbar. The Print option screen will appear.



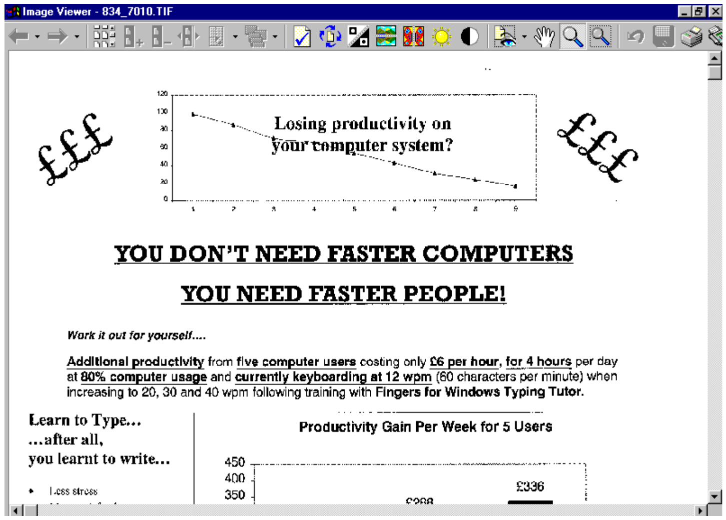
The Print Options screen shows what options are available when printing out the items you have selected to print out form TCM.

The options include printing a summary page of the items being printed, Printing the various TCM events such as Phone calls, Letters, E-mails, and Images on separate pages

Click on the 'Properties' button to select the printer that you want to use for printing out the document.

Image Viewer

To view an image (BMP, TIFF, JPEG, FXR and FXD.) from a pending tray or a contact folder in the TCM filing tree, double click on the image with the left mouse button. The Image Viewer will appear showing the image you double clicked on in the folder or pending tray *(See below)*.



Use the scroll bars to the right and bottom of the Image viewer screen to see the areas of the image that are off screen.

If you are in a contacts folder in the Filing screen or Telephone call screen click on this button 

The Image viewer will open showing thumbnails for all the compatible images in the contacts folder. To view any of the thumbnails full size single click on the image you wish to view with the left mouse button. To view another image full size, single click again on the relevant image with the left mouse button or, alternatively use the cursor keys on your keyboard to move through the other images in the contacts folder.

Note: Tiff images must not be LZW compressed. This type of image requires a special licence from UNISYS.

The image below shows the Image viewer showing two columns of thumbnails. With the thumbnail the user has chosen to view shown in the main viewing area.

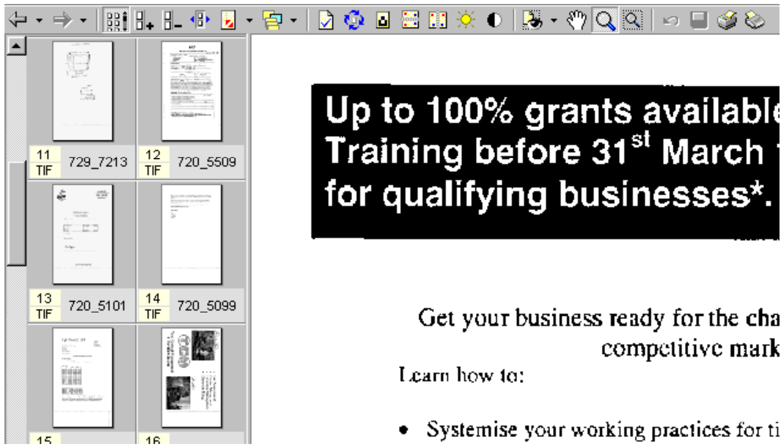
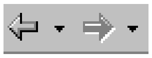
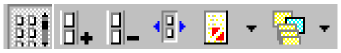


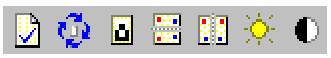
Image Viewer Toolbar

 **Viewing History**

When you have viewed a number of images in the contacts folder or pending tray use these buttons to return quickly to a previously viewed image and also to see which images you have viewed already in the folder or pending tray.

 **Thumbnail Controls**

This group of 6 buttons allow you to control how the image thumbnail buttons are displayed.
From left to right the buttons are:
Switch thumbnails on or off
Add another column of thumbnail images (Maximum is 3 columns)
Remove a column of thumbnail images
Swap sides moves the thumbnails to the left or right of the screen.
Thumbnail size (Large, Medium, Small)
Sort thumbnails (Name, Type, Date)

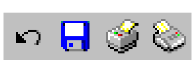
 Image manipulation controls

These buttons allow you to alter the appearance of the image you are viewing.
From left to right the buttons are:
Image Enhancement allows you to see the image you are viewing clearer
Rotate the Image 90¯ clockwise
Negative Image
Mirror Image Vertically (Flips the image you are viewing)
Mirror Image Horizontally (Reverses the image you are viewing)
Alter the **Brightness** of the image you are viewing
Alter the **Contrast** of the image you are viewing

 Image Viewing Controls

This group of 4 buttons allow you to view the image you are viewing of screen in different ways.
From left to right the buttons allow you to:

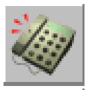
View the Image (Fit to width, Fit to screen, Original size 100%)
Grab Hand allows you to grab the image and move it up and down the page to view the areas of the image that are off screen.
Magnifier zooms into an area of the image you have selected
Fixed Region Magnifier when this option is selected any area you have chosen to zoom into on an image will apply to any other image you choose to view in the folder or pending tray you are viewing.

 Miscellaneous options

Undo allows you to undo a alteration to an image by 1 level.
Save the image that you have altered
Print the image you are currently viewing
Fax allows you to fax the image to a TCM contact. You need Winfax v9.0 or higher for this to work.

All the above items are activated by single clicking on the relevant icon with the left mouse button.

Making or Receiving a telephone call…



Choose this icon from the Taskbar if you have an incoming call.

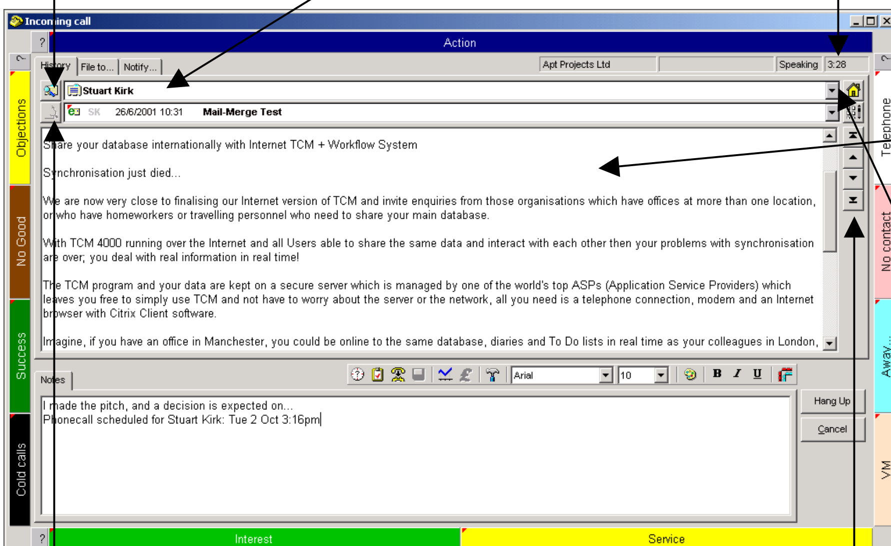
Choose this icon if you want to make an outgoing call, or choose the contact in the filing list, right-click and choose the 'Call now' option from the pop-up menu.

This will then bring up the telephone call screen. When making an out-going call, choose the contacts telephone number and then click the connect button to start your conversation and the call timer.

This button gives you access to the contact's details.

This is where the contact's name is shown.

The duration of the telephone call is shown here.



This box shows the last call or document linked to the contact you are speaking to.

This drop list gives you access to all the contacts at a company.

This button is used for launching the application that created the document shown.

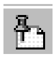
Press the Template buttons for easy entry of messages.

Use this group of buttons to move through all the contact's earlier correspondence

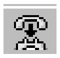
Telephone Call Screen Toolbar

Click this icon to ‘Start the call’

Use this icon to ‘Schedule a return call’ to a TCM contact



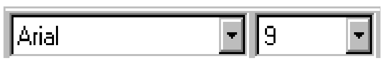
Click on this icon to ‘Schedule a to-do task’



Use this icon to ‘End the current telephone call’

Click this icon to create a sales forecast. See the Forecaster manual for more details.

This icon is for creating a Customer Service Management call. See the ‘Customer Service Management’ manual for more details.



Use these drop down menus to select the style and size of font used in the telephone call screen ‘Notes’ window.

Use this icon to select the colour for the text in the telephone call screen ’Notes’ window.

These three icons are for altering the style of the font used in the telephone call screen ‘Notes’ window. From left to right the buttons are **Bold**, *Italic*, and Underlined.

Click this icon to create and select the Templates that you want to appear around the Telephone Call screen.

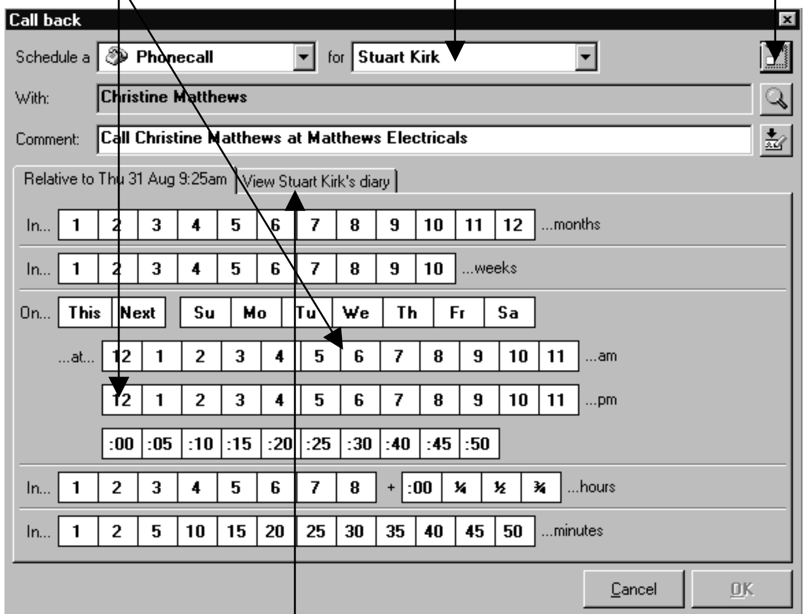
Schedule a call back…

To reschedule a call back click on the reschedule button that you will see on the Telephone Call screen Toolbar and the linking screen.

Choose the time period for the call back from months to

Choose the name of the person the call-back is scheduled for here.

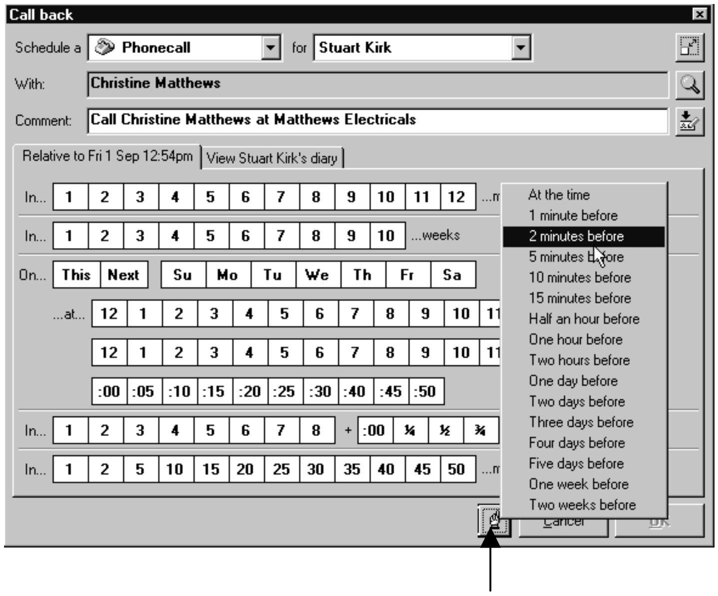
Full screen mode



Click here to see the diary of the TCM user the call back is being scheduled for.

Schedule a call back… ***continued***

To set a call back reminder click on the button to the left of the 'Cancel' button and from the menu that appears select the time for when the reminder is to appear.



Click this button to set a reminder for your call back.

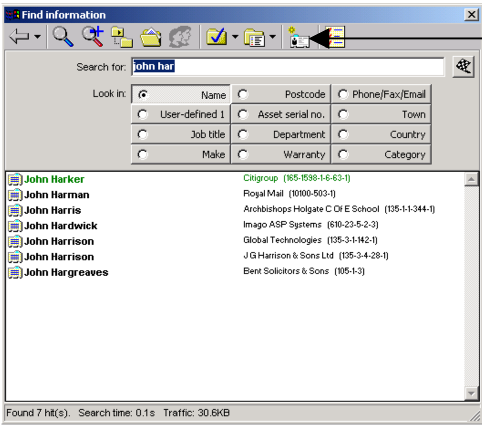
When you reschedule a call-back for another user of the TCM system the 'Phonecall' appointment will appear in their diary.

Note: The event reminders will only pop-up if you have the TCM CEfile program running. You can check to see if the TCM CEfile is running by checking the Windows system tray.

If you can see this icon then the TCM CEfile program is running.

New Contact from the telephone call screen

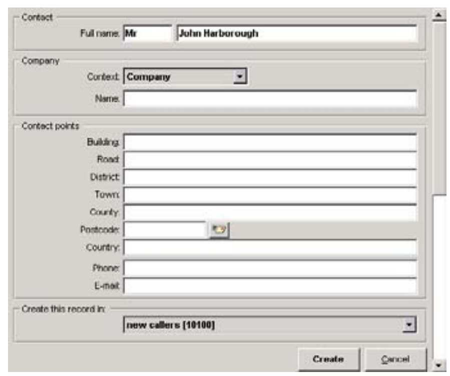
If you receive a call from a contact that doesn't exist in your filing system, and you have opened the Incoming Call screen, you can enter their details without closing the call screen down.
Do a search for their name to make sure the contact doesn't exist in your filing system, if the search shows the message 'No matches found' or the contact doesn't appear in the results for the search click on the 'New Contact' button.



Click on this icon to open the 'New Contact' details screen.

The 'New Contact' screen will appear, the information you can enter into the 'New contact' screen will depend on what options you have set in the 'File\Setup\Quick new contact' screen.

Enter the details for the contact and when you have finished click on the 'Create' button to save the contacts details. You will then find yourself back at the call screen where you can make a record of the call.



Enter the details for the contact and when you have finished click on the 'Create' button to save the contacts details. You will then find yourself back at the call screen where you can make a record of the call for the new contact.

Relocating a New Contact or Folder

When you create a New Contact from the telephone call screen, a new folder is created for the contact and placed in the 'New Contacts' pending tray. Once you have finished the call you can move them to the correct folder in the filing tree.

From the 'Pending Tray' drop list, on the filing system toolbar, select the 'New Contacts' option.

- From the list of new contacts highlight the contact that you wish to move by single clicking with the left mouse button on the contact's folder.

- From the 'Edit' menu select the 'Relocate (Cut)' option.

- Now go into the filing system tree and locate the folder where you wish to place the new contact's folder.

- Highlight the folder of your choice by single clicking with the left mouse button on the folder and then choose the 'Relocate here (Paste)' option from the 'Edit' menu. (Do not rush the program. On the left side of the status bar you will see details of how the relocation is progressing.)

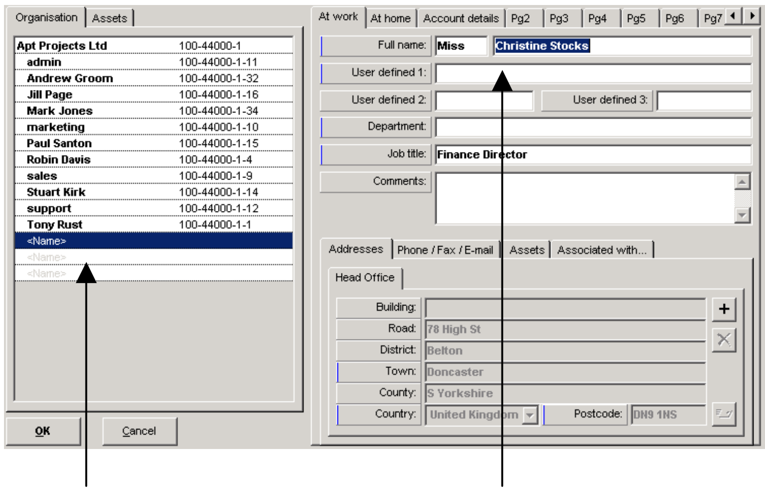
- The contact's folder should now appear in the filing tree where you placed it.

(**Note**: If the contact's folder doesn't appear in the filing tree, single click with the right hand mouse button on the folder in the filing tree where you placed your 'New Contact' folder and choose the 'Refresh' option from the pop-up menu.)

Adding a Contact to an existing Company

To add a contact to an existing company in the TCM filing system, first do a search in the filing system for the company where the 'New Contact' works. When the company name appears in the search list, single click with the left mouse button on the company name. The company folder will appear in the filing system tree. Highlight the company name and then bring up the company details by clicking on the Company details button that you will find on the filing system toolbar.

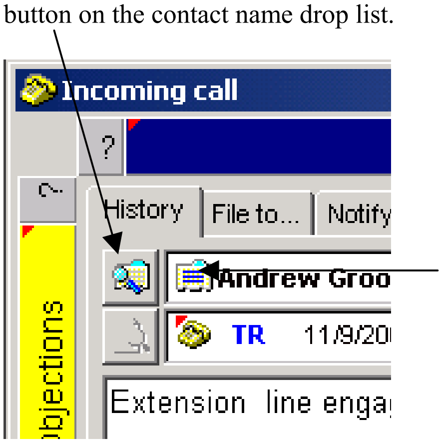
When the company details appear on screen you will see spaces that contain the words <New Contact>. If you click on one of the spaces you can enter the details for the new contact at the company.



Click on one of the <Name> spaces to enter a new company contact.

Enter the new contacts Name and any other details in the spaces provided.

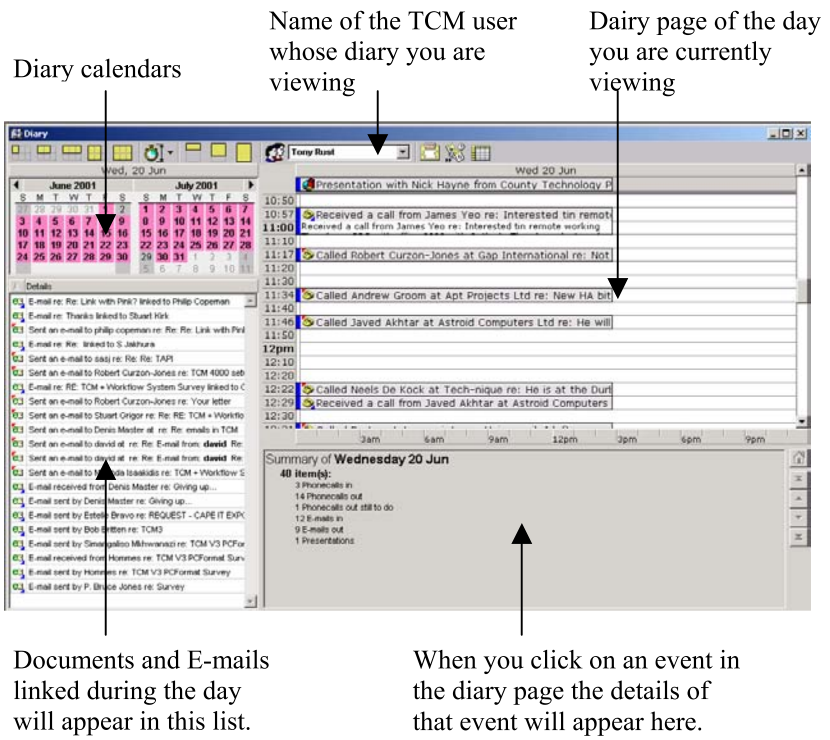
You can also add a new company contact from the telephone call screen by clicking on the contact details button on the contact name drop list.



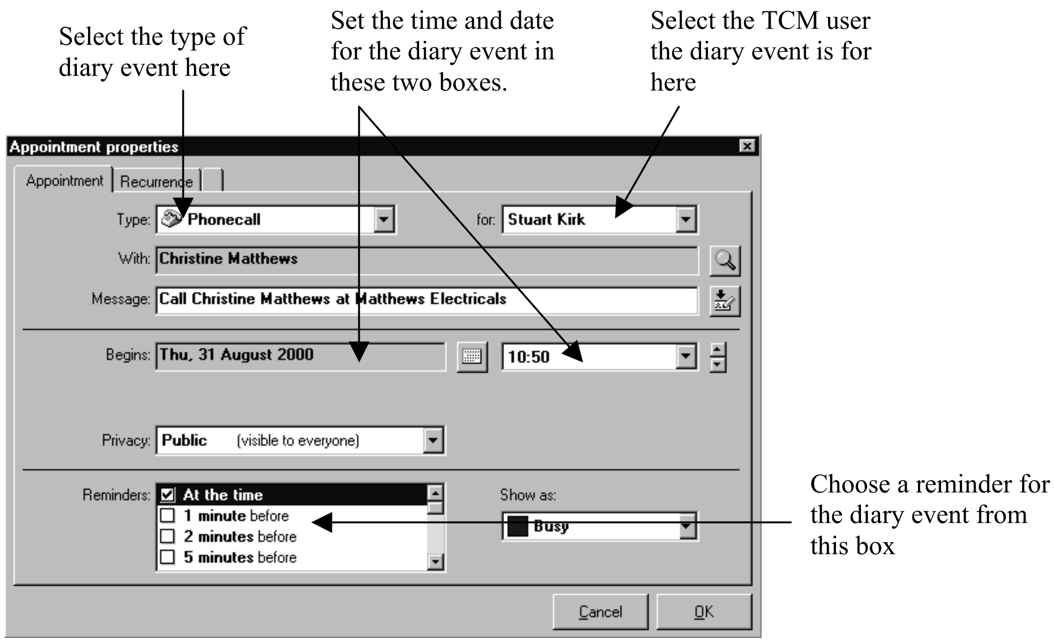
This will bring up the company details screen. Again you will see spaces provided to add a new contact. When you have finished entering the contacts details click on the 'OK' button. You will then find yourself back at the telephone call screen with the new contact's name appearing in the contacts name box.

Add a Diary Event…

Click on the 'Diary' button from the TCM task bar, which will bring up the main diary screen.

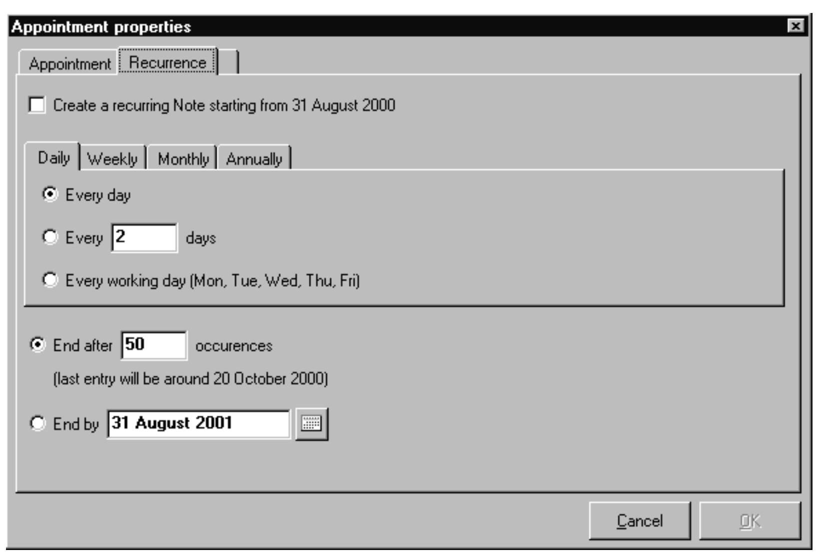


To create a new event, right click on a time slot in the diary page and from the pop-up menu select 'New appointment'.



Once you have finished you will see the New Event in the diary of the person the appointment was made for.

If the diary event is a recurring event click on the 'Recurrence' tab. Select if the recurrence is a Daily, Weekly, Monthly, or Annual event and set the options as appropriate for the recurring event.

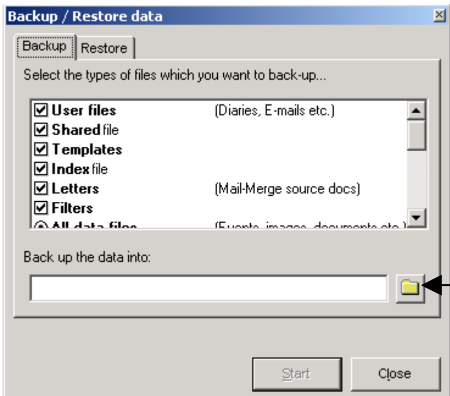


Now set the time period for the recurring event. You can choose to end the recurring event after a number of occurrences or select an actual date for the recurring event to end by clicking on the icon to the right of the date box. Once you have set-up your recurring event click on the OK button. The diary will now be populated with the recurring event.

Backing-Up your TCM data

To back-up your TCM data you need to be logged on as the Administrator. Once logged on to TCM as the Administrator click on the 'Tools' option from the TCM menu bar and from the drop down menu that appears choose the 'Backup/Restore' option.

Choose the items that you want to be backed-up from the list, items that you choose to be backed-up will have a tick in the box to the left of the item name. Once you have chosen the items you want to be backed-up click on the button showing the folder to set the path to where the backed-up data is to be saved. Once you have selected the folder where the backed-up data will be saved click on the 'Start' button to begin the backing-up process.



Click here to set the path to the folder where the back-up will be saved.

Items that can be backed-up:
User files
Shared file
Template file
Index file

Other back-up options (Only one of these options):
All data files (Events, Images, Documents, etc.)
Events Only (Notes and Annotations)
Contact Details Only (Company and Contact Details)
File Info Only (System Information Files)

Note: Backed up files are exact copies of the originals and no special restorative function is required.

Frequently Asked Question's

Q. How do I Import an existing database?
A. See the Import Wizard instruction manual for instructions on how to import an existing database.

Q. How do I create a new folder?
A. This manual gives details on creating the various types of folders available within TCM. See the chapter on 'Create a new folder'

Q. How do I Scan in an image?
A. See the Scanning Wizard manual for instructions on how to scan in any images into TCM.

Q. How do I link items from the pending trays?
A. This is covered in the Scanning Wizard instructions.

Q. How do I Create a New Template?
A. The 'New Template Wizard' guide will give you details on how to create a New Template for use in TCM.

Q. How do I Set-up and edit a New Template?
A. The 'New Template Wizard' guide will show you how to 'set-up' your new template for use in TCM

Q. I have received a Telephone call from a new contact, how do I enter the new contact from the Call screen?
A. Click on the 'New' button that appears in the find information box.
Enter the contact's details as normal then click on the 'OK' button when finished. You should now find yourself back in the telephone call screen with the new contact's name showing in the 'contacts name' box.

Q. Where are the new contacts stored when created on the call screen?
A. 'New Contacts' are stored by default in the New Contacts pending tray. This is accessible from the filing screen.
Folders in pending trays are not indexed until incorporated within the Main Filing tree. You can change the path so that New Contacts entered in this way are stored in a folder in the Main Filing tree and are automatically indexed.

Q. How can I make it easier to save my word processor files in theWork Files pending tray.
A. Set the file 'Save to' path in your word processor, or other applications, to the Work Files path. In Word or Excel, click Tools/Options/File locations.

Q. How do I move a new contact into the filing tree?
A. By using the relocate (cut) and relocate here (paste) options from the 'Edit' menu. See the 'Quick Start Guide' for more instructions.

Q. How do I view scanned items in the pending tray as thumbnails?
A. Click on this button on the Filing system toolbar, click again to view items in a list.

Q. What is the daily archive for?
A. The daily archive makes a record of all documents linked each day.

Q. Is it safe to throw away correspondence once it has been scanned into TCM?
A. We suggest that you keep anything that is important filed away. Certain types of documents are required by law to be kept for specific periods of time.

Q. How do I view a Word processed document, Spreadsheet, or Graphic file within TCM before linking it?
A Click on the view button that you will see on the linking screen, the application with which the file is associated will start and show the item on screen.

Q. What is PAF?
A. The PAF (Postal Address File) is a file that contains 95% of all British postcodes. When used with TCM you can save a lot of time typing when entering a company or contacts address details. See our Web site for details. Www.aptprojects.com

Q. What are the system requirements for TCM?
A. We recommend that your computer has a Pentium P166 or higher processor, 32 Megabytes of RAM, Microsoft Windows 95/98 or Windows NT4 Workstation, 15 Megabytes of free Hard Disk space, CD-ROM drive and to get the most use out of TCM, a scanner.

Q. Is help from a web site available?
A. Yes. The web site address is http://www.aptprojects.com

Q. Can I edit a document, spreadsheet, graphic, etc, once it has been stored and linked in TCM?
A. Yes, when you have located the file you wish to edit just double click on the file in the company/contacts correspondence list using the left mouse button.

Q. Is TCM suitable for storing collections of items?
A. TCM is ideal for storing collections. Once scanned into TCM you will no longer be wearing out the original by holding or handling it or by exposing to light and the atmosphere.

Q. What about copyright issues. Can I just store images from magazines into TCM for private viewing only without problem or do I need to seek permission before I go ahead and scan an item from a magazine?
A. Strictly speaking, you should check the copyright details regarding all pictures and cuttings taken from any publications that you wish to store in TCM.

Q. How often should I do a Back-up of my data?
A. It depends how important your data is to you. Regular backups after each session will ensure that loss of data is minimised.

Q. I click on a file but the application does not open to display the file.
A. Make sure that you have the application on your computer and that the file type is associated with the application.

Q. I have a 14" monitor that can only run at 640 x 480. Will TCM be usable at this resolution?
A. Although TCM is useable at 640 x 480 we recommend that you use TCM at a minimum resolution of 800 x 600.

Q. What is the best resolution to save a scanned image at, I want to save disk space but also keep the image clear so it can be read?
A. This is a matter of user preference, for letters and flyers we recommend that use a resolution of 150 dpi, for colour images, etc, a resolution of 300 dpi should suffice. You will find the settings best suited to your needs by trial and error.

Q. Are scanned images compressed in any way?
A. With the TCM Scanning Wizard you are able to save the scanned image as different file types, the file types available to save the scanned image as are BMP's, TIFF's and JPEG's although your own scanner software may provide you with additional file types offering different levels of compression.

Q. Can a template be altered once it has been created?
A. Yes. To alter an existing template, use the right mouse button to single click on one of the template buttons and choose the 'Properties' option from the menu. Alter the template to suit your needs and then click the 'OK' button.

Q. I have a computer with OS2 Warp v4 as the operating system, will TCM run on it?
A. TCM is only available for Microsoft Windows 95/98, Windows NT 4 Workstation or later operating systems.

Q. I have a portable computer, is TCM suitable to be used on a portable?
A. A portable computer is an ideal platform on which to run TCM and allows you to take your filing system with you. Because the TCM program doesn't use too much room on your hard drive you will be able to carry all your contacts around with you on your portable.

Q. Does TCM set-up the pending tray paths on my computer during installation or do I set them up myself?
A. When you install TCM the paths for the various folders are set-up automatically. If you need to alter any of the path settings you can do this by choosing the 'Paths (Setup)' option from the 'File' menu. Choose the category whose path you wish to change, double click on the relevant category and choose the new path for that category on your system. Once you are finished click on the OK button.

Q. Can I change the path settings once they have been set-up?
A. Because TCM allows you to have one or more different path settings for the various folders you will need to set up some of the paths manually. This manual gives clear instructions on how to set up the paths for the various folders which TCM uses.

Q. If I create a folder within the TCM Main Files folder in Windows Explorer will I be able to see it in the TCM filing tree.
A. Although the folder will appear in the filing tree it will not be indexed correctly by TCM. We recommend that any new folders that you wish to use within the TCM filing tree are done from the Filing system toolbar.

Q. What if I need further information or advice.
A. E-mail us at support@aptprojects.com To receive a response to your email you must have registered your version of TCM. You can register your copy of TCM by E-mail at TCM@aptprojects.com, with the subject as TCM Registration. Or Fax us on 44 (0)1427 875104 or by telephone on 44 (0)1427 875103.