

## User's Guide

Information on 'How To'

## Reference Guide

Information on 'What' and 'Where'  
About InContact!

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## Getting Started

InContact requires 700K of disk space to run. Hard disk installation is recommended, but it is possible to run from a floppy disk of 700K or more. This would include 5.25" High Density diskettes, or 3.5" diskettes (low and high density).

### To install InContact do the following:

- Copy all files to the desired disk and subdirectory (if applicable).

- Run Windows

- Run INSTALL.EXE using the *run* command in Program Manager.

The installation program will copy the program files to a drive and directory that you specify, or allow you to leave the program files in the current location (if you've already copied the files to your hard disk). It will create a program group for InContact and then run the program.

When you first run InContact it creates a file called SAMPLE.CNT. You are welcome to use this for your data file, or create a new file. InContact automatically loads the last file used when you begin a new session.

The rest of this manual explains how to use InContact. You should probably read at least the first two chapters to use the program properly. These chapters cover the data fields and the use of files. Thank you for purchasing InContact and we hope you like using it!!

**NOTE:** This program requires a basic knowledge of Windows. If you find any of the Windows-specific instructions given in this manual confusing, you may want to consult your Windows manual to refresh your memory..

## Using Files

The first menu on the menu bar of InContact is the File menu. This is where the functions for using files are located. From this menu you can *Use* an existing file, create a *New* file, and *Import* and *Export* data files.

The first time you run InContact it creates a file called SAMPLE.CNT. You may use this file if you wish, and each time you run InContact it will load this file automatically. You can also create your own data files, each with a different group of contacts. InContact will automatically load the last file used, but you can load other files at any time.

### Use File

To use an InContact file, select Use from the File menu. A **file selector** dialog will allow you to select a file from the current directory. Simply click the appropriate filename with your mouse or type the filename into the input box. You can change drives or directories if necessary. When you have selected the correct file, click OK to load, or Cancel to abort. *For more on the file selector, see **File Selector** in this manual.*

### New File

To create an InContact file, select New from the File menu. You must enter a filename, or you can select a filename using the file selector. You can also change drives or directories if necessary. Click OK to create the file, or Cancel to abort. *For more on the file selector, see **File Selector** in this manual.*

### Import/Export

These commands are used to import data from other programs, or export data for use with other programs. *For information on importing and exporting, see the **Import/Export** chapter of this manual.*

## The Main Screen

The entry fields in this program are very flexible. Most of them allow you to enter characters beyond the displayed area. And many of them allow more than one type of data to be entered. There are many ways you can customize your data with InContact to better suit your needs.

This section will divide the fields into categories much like they are in the program (*Ex: phone number fields, address fields, etc.*). Each type of field will be described as it will normally be used. Of course you are free to experiment and come up with your own uses.

As with most Windows programs, you should use the TAB and SHIFT TAB keys to move between fields. Each time you press the ENTER key InContact saves the current record. While this does not affect your data, it could be inconvenient if you are trying to move to the next field.

### Contact

The contact field is the most important field in the program. This is because the index for the program is based on this field. The program tracks and sorts the records in your file by the data you enter in this field.

Normally you will want to enter your contact's name in this field if that is how you want to track your contacts. You can also enter a company name here if you want to track contacts by company name. If you enter a person's name in this field you will probably want to type in the last name first, as the records are sorted alphabetically. Of course, you could type in the first names first, as long as you don't mind looking a little harder for the proper record on the Locate list.

### Category/Status

The category and status fields are pop-down list boxes with user-defined elements. That means you decide what goes in the list. This can be very useful if you have your own rating system for contacts or even if you just use the Hot, Warm, and Cold system.

You can select the correct item from these lists in several ways. You can pop down the list and use your mouse to highlight the item you want. You can also start typing the item name (when the cursor is on the category or status field) and InContact will try to find it and fill it in. If each of the items start with a different letter, you can type just one letter to fill in the correct item. You will be able to use these fields when performing selects. *For information on how to set up the Category and Status fields, see the **Category/Status** chapter in this manual. For information on selects, see the chapter on **Performing Selects** in this manual.*

## Phone Numbers

The flexibility of the phone numbers in this program should be good news for some people. Not only can you enter extra characters (more than the standard 10), you can also type **any** character in these fields. This means you can type a person's extension after their phone number, if applicable. And since a rigid format is not enforced, you can also enter international phone numbers in any of the phone number fields. These fields should accommodate any phone number you might run into.

If you plan to use the Autodialer, you'll want to enter all of the digits you want the modem to dial. This includes the 1+ Area Code and anything else (such as cancel call waiting codes). And because of limitations with Windows, you may have problems using COM3 or COM4 with InContact. *For information on using the Autodialer, see **Call Logging** in this manual.*

## Work and Home

These two fields are somewhat of a "free for all". That's because chances are pretty good that you won't be using them for what they were set up to be. For instance, if you entered the company name in the contact field, you'll probably want to put your contact's name in the work field.

The home field doesn't really have a specific use. Generally, you will want to use it for a greeting. This will be most useful if you do form letters, since you don't want to address your letter to Doe, John (if that was how you entered your contact's name in the contact field). You can use this field for just about anything, such as the name of John's secretary. You could consider this your third custom field.

## Address fields

The address fields will be a welcome change. At one time or another everyone has had to enter an address into a field that didn't have enough room for it. Although they aren't limitless, these fields have more room for information than most. Each address line will hold up to 40 characters. The city and state fields will hold up to 25 characters each, and the zip code field will hold 15 characters. This is especially useful for international addresses which can have longer zip codes.

## Notes

The notes field is for any additional information you want to keep on file. This could be directions to John's office or comments about his character (like "What a nice guy!"). The notes field will hold up to 64K (64,000 characters) worth of text. It is also included in the select dialog, so you can perform a select for anything you type in the notes. And if by chance your notes exceed 64K, you can make them an attached file. *For information on attaching files, see **Attached Files** in this manual.*

## Flags

The flag fields are another form of custom field. They are a group of eight check boxes, and you can define the text for each of them. These can be used for anything that would be a yes or no (checked or unchecked). Have you sold anything to John Doe? Or have you even met John yet? Does John have kids? Whatever you might want to keep track of. The flag fields can also be used in selects.

### **Last Call and Call Back**

These fields can be used to note the date you called a contact, and the date you want to call him back. Later on you can find these dates with a select. This is useful for pulling up all the contacts you need to call on a certain date.

The button with an ellipsis to the right of these fields is a **date finder**. This allows you to view a calendar to find a specific date (like the date for "next Monday"). There are scroll bars which allow you to change the month and year if you need to. *For more information on using the date finder, see **Date Finder** in this manual.*

### **Birthday and Age**

The birthday and age fields can be used if you wish to track a contact's birthday. The age field is calculated from the date in the birthday field, but can be manually entered.

## Editing Contact Records

There are several commands which can help you when you are adding or changing contact records. These are contained on the Edit menu and the Contact menu.

### Edit Menu

The edit menu contains the Windows commands of undo, cut, copy and paste. These commands work within individual text fields and apply only to text-related changes.

**Use** undo to undo to last change you made.

**Use** cut to remove a highlighted piece of text to the clipboard.

**Use** copy to make a copy of the highlighted text and put it in the clipboard.

**Use** paste to place the text in the clipboard at the current cursor location.

### Contact Menu

The contact menu contains several commands which are important when adding or changing contact records. These are store record, cancel changes, and add.

**Use** store record to save any changes made to a contact record, and to save a new record.

InContact will not save the new information if you don't store the record.

**Use** cancel changes to remove any changes you may have made to a record.

**Use** the add button to create a new record. Don't forget to store the record when you are finished.



## **View Menu**

The View menu allows you to customize the look of your program to suit your needs. Without affecting your data, you can add and remove fields and other elements from the display. The view menu has commands that refer to the control bar, phone numbers, optional phone numbers, address(es), notes, last call info, and flags. When you select any one of these, the corresponding fields or items are removed from the display (data remains intact). The commands work in a toggle fashion. Click once to turn off, again to turn on. There are also commands to display all information and minimum information (contact, phone numbers, and category/status fields). Experiment with these settings to find the one right for you.

## **Category/Status Fields**

The uses of the category and status fields are described in the Main Screen chapter of this manual. This section will cover how to set up the elements of the category and status fields, which are list boxes.

To define the items for the category and status lists, select Category/Status from the Setup menu. From the radial buttons select category or status, whichever you wish to work with. Click the Add button to add each new item to the list. When you have entered the text for the list box item into the input field, click the OK button, or click Cancel to abort. You can enter up to 1000 items in each list. Follow this process for both category and status. Click OK to save the changes, or Cancel to abort.

## **Flag Fields**

The flag fields are eight user-defined check boxes. Some of the possible uses for these fields are described in the Main Screen section of this manual. This section covers how to set up the names of the flag fields.

To set up the flag fields, select Flags from the Setup menu. Simply type the text that you wish to appear next to each flag field into one of the eight input boxes. Later, you can perform selects using the flag field information.

## **Locating A Contact**

There are several ways of locating a contact file with InContact. These include the use of the locate function, the scroll bar, and some commands from the contact menu.

### **Locate Function**

The locate function is used to find a contact record quickly and easily. To use the locate function, click the locate button on the control bar, or select Locate from the contact menu. InContact will pull up a list of all contacts on file, sorted by contact name (or the contents of the contact field). You can select a contact by highlighting it, then clicking the OK button (Cancel to abort). The select button is also accessible from this dialog.

### **Scroll Bar**

The scroll bar is on the control bar of the main window. When you click the arrow buttons or drag the scroll box InContact quickly scans through the records in the current file. This is a good way to move through the file if you don't want to use the locate dialog.

### **Contact Menu**

The contact menu has two commands, next and previous, which can be used to move through records. When you select next InContact moves to the next record on file (relative to the current position). When you select previous InContact moves to the previous record on file.

## **Date Finder**

The date finder is called by using the button with an ellipsis on it that is located to the right of a date field.

The date finder is a calendar utility that you can use to find any date. When you click the date finder button, a calendar for the current month will pop up. Use the scroll bars to change the month or year and click on the date you want to select, or type it into the input box. When you click OK InContact will fill the date you selected into the current date field. The date finder can be very useful for finding a date such as "next Monday" or "two weeks from today".

## **File Selector**

The file selector is called by many dialogs in InContact. In most cases where you are asked for a filename you will have the file selector available. The file selector is a list of filenames that you can use to browse for the file you need. You can also change drives or directories. Sometimes there will be a button with an ellipsis next to the input box for the filename. Clicking this button will call the file selector. Once you have called the file selector, it functions very much like the file selectors in most Windows programs. When you highlight a filename and click the OK button, InContact will fill in the filename.

## Performing Selects

The select function allows you to work with a subset of records in the current file. To perform a select choose the Select command from the contact menu or you can click the select button in the locate dialog. From there a select dialog will allow you to enter the parameters for your select. Any combination of data may be used. Click the check box of the criteria to search for, the options are as follows:

**Find Text** : Type the text to search for into the input box. Click the Notes box to include the notes field in the search. InContact will select all contacts which have the text (anywhere on the record) that you entered.

**Call Back** : Enter a date range in the two fields provided. InContact will select all contacts whose call back date falls in the range you entered. The date finder is available for each field.

**Last Call** : Enter a date range in the two fields provided. InContact will select all contacts whose last call date falls in the range you entered. The date finder is available for each field.

**Category** : Select the category to search for from the list box. InContact will select all contacts with the category you entered.

**Status** : Select the status to search for from the list box. InContact will select all contacts with the status you entered.

**Birthday** : Enter a date range in the two fields provided. InContact will select all contacts whose birthday falls in the range you entered. The date finder is available for each field.

**Flags** : Click all flags that apply. InContact will select all contacts which have the same flags checked as the ones you chose.

From the radial boxes select these options:

**Search** : All on File: all records will be searched. Current List: only the contacts which met the criteria from the last select will be searched. This is useful for performing embedded selects.

**Find** : Select matches or exceptions to the current select criteria.

Don't forget to click the check boxes in front of each criteria you want to include, or InContact will not use it. Click OK to select, or Cancel to abort.

## Call Logging

Call logging is used to log any calls you make and note the results, as well as the elapsed time of the call. To log a call, click the icon with a phone on it (located on the scroll bar) or select Call from the Options menu. This will pull up the Call dialog.

From the radial buttons select the phone number to use (numbers are from the current contact record), or enter a phone number. Then select Start Call, Auto Dial or Cancel.

### Start Call

The Call In Progress dialog will come up and begin timing the call. To pause the call click Pause (click again to continue). From the radial buttons and check boxes, select the ones which adequately describe the results of your call. To end the call click End Call. The call will be noted in the log file for the current record.

### Auto Dial

InContact will attempt to dial the number you've selected through the modem. Then it will proceed to the Call In Progress dialog. To insure proper use of the Auto Dial feature, make sure you select the proper configuration from the Preferences dialog (on the Setup menu). Also be certain that you have entered the phone number exactly as you wish it to be dialed. *For more on the Preferences dialog, see **Preferences** later on in this manual.*



## Attached Files

The attach files function can be used to associate a non-InContact file to an InContact record. Examples of this would be a letter or an invoice. InContact will keep a separate list of attached files for each contact.

When you select an attached file to view, InContact will run the appropriate program. If you wish to view a file which does not have an existing file association, you can add a new file association using Windows File Manager. For information on adding file associations, refer to your Windows manual. In this way you can keep track of all files that relate specifically to a certain client or contact, and view them while running InContact.

To view an attached file or attach a new file, select Attached Files from the Options menu or click the button with a paper clip on it (located on the control bar). This will pull up a list of all files attached to the current contact.

To view an attached file, highlight it and click the View button.

To attach a new file click the Add button. Enter a description and a filename (file selector available).

The description will be used in the list of attached files.

To modify the settings for an attached file, highlight it and click the Modify button.

To detach an attached file, highlight it and click the Detach button. This **will not** delete the file.

To find an attached file, click the Find button. Enter any part of the text for the description of the file.

Click Done to return to the current record.

## Import/Export

The import and export functions are used to bring data into InContact from another program, or send data from InContact to a data file for use with another program. Both are called from the File menu.

### Import

**WARNING:** Please read this entire section before attempting an import. This section contains important information about file recovery in case you make a mistake during the import process.

Before you begin importing a data file, be sure you understand how the other program exported the data. If you make a mistake in the data format your data will be imported incorrectly.

Importing **will** affect your data file. To insure the recovery of your old file in case you make a mistake during the import process, be sure you have a backup of your old file. InContact normally makes a backup of all data files, but if you do not have enough disk space there will be no backup file. In that case you will need to make your own backup file. For information on making backup files, consult your DOS manual.

If you have a backup file before you import, you will be able to use the File menu command called Revert to Old File. Use this command to recover your old data if you make a mistake during the import process. The Revert to Old File command will copy your backup data to your old filename.

To perform an import select the Import command from the File menu. Provide the following information for the Import dialog:

**Select** the delimiter used in the import file. InContact will read files in the following formats: comma-quote delimited fields with linefeeds between records, tab delimited fields with linefeeds between records, linefeeds after each field.

**Check** the box called Use Header Record if the import file has a header record. InContact does not read the header record, but checking this box will tell InContact to skip it and start importing data from the next record.

**Enter** the filename to import the data from or use the file selector. InContact will track all previously used filenames in the list box. If you re-use a previously used file, InContact will remember the import format used with that file.

**From** the list of available fields (see Available Fields below for more information) select those you will be importing. By selecting fields you will be telling InContact where to put the data it finds in the

import file. Make sure you select the fields in the exact order they are in on the import file or the imported data will be placed in the wrong fields.

**To** add each field to the Read list, highlight it and click the Add button.

**To** remove any unwanted fields from the list of selected fields, highlight it and click the Delete button.

**Click** Clear to remove all fields from the list of selected fields.

**To** save the import format click the Save button.

To begin the import click OK, click Cancel to abort the import process.

## **Export**

Before exporting, be sure you understand how the other program expects to receive data. To perform an export select the Export command from the File menu. Provide the following information for the Export dialog:

**Enter** a filename to export the data to, or select a previously used filename (file selector available).

In the list box InContact will remember the filenames previously used.

**From** the list of available fields (*see **Available Fields** below for more information*), select those you wish to export. Click the Add button after each selection to add it to the list of fields to write (export).

If you are using a previously used file, InContact will remember the export format for the file and fill in the fields for you.

**Use** the Blank Field to add blank lines to the export file (if you need this for the other program).

**To** remove any unwanted fields from the list of selected fields, highlight it and click the Delete button.

**Click** Clear to remove all fields from the list of selected fields.

**Click** Save to save the format you've created for future exports.

Click OK to write the export file, Cancel to abort.

**NOTE:** Exporting does not affect your data, so if you make a mistake you can export the information as many times as necessary.

## Available Fields

These are the fields that are available for importing and exporting as well as reports. Next to each is a brief description of the data that it signifies.

**BlankLine:** Add a blank line to the export file, no use for importing or reports

**Age:** Age field

**BirthDate:** Birthday field

**CallBack:** Call Back field

**Contact:** Contact field

**FaxPhone:** Fax phone field

**Greeting:** Home field (first line of home address section)

**HomeAddress:** Home field (first line of home address section)

**HomeAddress2:** Home Address field (second line of home address section)

**HomeAddress3:** Combine data from Home City, Home State and Home Zip into one field, no use for importing

**HomeCity:** home City field

**HomeState:** home State field

**HomeZip:** home State field

**LastCall:** Last Call field

**MobilPhone:** Mobil phone field

**ModemPhone:** Modem phone field

**Name:** Contact field

**OtherPhone:** Other phone field

**WorkAddress:** Work field (first line of work address section)

**WorkAddress2:** work Address field (second line of work address section)

**WorkAddress3:** Combine data from Work City, Work State and Work Zip into one field, no use for importing

**WorkCity:** work City field

**WorkPhone:** Phone field

**WorkState:** work State field

**WorkZip:** work Zip field

## Reports

Use the reports function to print a report for the current file. To print a report select Print Report from the File menu. Provide the following information for the Print Report dialog:

**Choose** all, selected or current contacts to print in the report.

**Enter** a description for the report. This description will serve as a title for the printed report.

**Select** the fields to use in the report. See **Available Fields** in this manual for information about the fields available.

**To** select a new font for the report, click the font button. Then select a new font, font size, and style (bold, underline, italic, or strikethrough).

**Save** the format for use later on by clicking the Save button.

Click OK to print or Cancel to abort.

## Letters

Use this function to print form letters from a document you have already set up to work with InContact. You can use the output from most word processors to create a document template.

### **To set up a document template:**

To make a document template with your word processor you will need to set up a document and print it to a file (or print to disk). Most word processors will print to a file, but if yours will not you can duplicate this process in Windows. Refer to your Windows User's Guide for instructions on printing to a file using Print Manager (see Printing, FILE option).

When you are ready to create your document template, enter the text for the body of the document as you normally would, leaving room for the special codes which InContact will read. The fields which are available for use are listed in the Available Fields section of this manual.

To insert an InContact field into your document you must use the names on the left of the Available Fields list. When including them in your document you must encode each field in this manner: ~\*CONTACT~ (where CONTACT is the field name). A ~\* must precede each field name and a ~ must follow each field name. You may insert field names in any portion of the document using this method.

When you have completed the text for the document and included any fields you wish to insert you will need to print your document to a file. This file is your document template which you will use with InContact. You may use this file to print form letters from InContact as often as you like. For each new form letter you want to print you will need to create a new document template. If you do not wish to use this method for printing form letters you can use InContact to export the appropriate fields to a file. You can then use that file to perform a print merge with your word processor if it supports that function.

### **To print a form letter:**

Select Print Letters from the File menu, or select Quick Letter from the Options menu or click the icon with the letter and envelope on it from the control bar. This will call the print letters dialog. From there the following information is required:

**Select** which contacts to print a letter for: all, selected or current.

**Enter** the filename to use (file selector available), or select it from list of the last filenames used.

**Select** Print to print the letter(s) or Cancel to abort.

## Troubleshooting

Because of the nature of True Type users of Windows 3.1 may have problems with missing letters in fields if using a True Type font. If this occurs insert the following line (on a separate line) at the beginning of your document as a field. This line **must** be in the same font style and point size that the fieldnames are in. It also must appear before of all fields in the document. InContact will not print this line.

~\*ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz1234567890~

You may also want to include any other characters (such as punctuation marks) you think may be used in your fields.

If you get junk characters when you are printing a form letter try using a font that is supported by your printer. When you use a font that your printer doesn't have, your software has to send graphic images to your printer, and InContact cannot read a file that has graphic images instead of text. If you still cannot get a good printout, you may have to use a straight ASCII (text only) file as your document template.

If all else fails you can always export your data to your word processor and perform a mail merge.

## Labels

To print labels for contact records, select the Print Labels command from the File menu. If you want to print labels for a selected list of contacts be sure to perform the select before you print the labels. When you select Print Labels a dialog will come up from which the following options are available:

**Select** the contacts to print (all, selected, or current).

**Select** the address to print (work or home).

**Change** the print style (font) of the label by clicking the Font Properties button. From the new dialog select a new font, font size, and style (bold, italic, underline, or strikethrough). Click OK to continue, Cancel to abort.

**Select** a label format from the list box, or add/modify the label format (see below).

**Click** Print to start printing, Cancel to abort.

### Add label format

To add a new label format, click the Modify button in the label format section of the Print Labels dialog.

**Enter** a description for the new format

**Set** page dimensions (length and width)

**Set** page margins

**Set** label margins

**Specify** number of labels across

**Specify** number of labels down (per page)

**To** save format click the Save button

A diagram will show what the completed page format will look like. You can also print a test page.

When the new format is complete click OK to continue, or Cancel to abort.



## **Log File**

The log file is a list of all activities for a contact record. The activities tracked by the log file are calls made (using the call function), letters printed, and exports done. Each contact has a separate log file.

To view the log file for the current contact, select Log Book from the Options menu. Entries can be deleted by highlighting an entry and clicking the Delete button. To print the list click the Print button. Click OK to continue.

## Tools

The Tools menu allows you to install outside utilities such as Calculator and Clock for use with InContact. When you install a utility, it is added to the Tools menu.

The only option on the Tools menu is Modify Menu. Select this item when you want to add a new utility to the menu. This pulls up a dialog which allows you to set up the new utility.

**Enter** a title for the utility (for use on the menu).

**Enter** the name of the file to run (file selector available).

**Specify** whether InContact should pass data filenames.

**Enter** the file extension for the data files.

**Specify** whether InContact should pass current contact information

## Preferences

To set up or change the preferences for InContact select Preferences from the Setup menu. The following options are available for modification:

Change the path for the program files

Select any combination of general program options:

**Remember** Window Changes - size and location

**Remember** last file used

**Conserve** Memory (slower)

**Auto-Capitalize** during entry

**Confirmation** Messages

Auto-Dial options:

**Use** AutoDial Modem for Calls

**Select** Comm Device (COM1, COM2, COM3 or COM4)

**Enter** a dial out prefix (such as cancel call waiting codes)

*Note: There are known problems using COM3 or COM4 with Windows. If you have problems using these ports, consult your Windows manual.*

When all changes have been made, select OK to save new preferences, or Cancel to abort.

## **Help**

To access the on-line help, select any option from the Help menu. For context-sensitive help, press F1 from the Main screen, or click the Help button found on most popup dialogs.

## **Tips and Tricks**

The Tips and Tricks section of the User's Guide is provided only to registered users of InContact and is included only in the printed manual. Please Register!

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## Fields

The following section outlines all program fields, in alphabetical order, that are used in InContact. Many of these fields are optional, in fact, the only necessary field is the CONTACT field. Most of the fields are flexible as well, which means they can be used in any way. For suggestions on alternate uses of fields, check out our "Tips and Tricks" section in the User's Guide. You can also customize the display (via the View Menu) to show only those fields that are in use. *To find out more about the View Menu, see the **Menus** section of the Reference Guide.*

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[Phone \(work\)](#)

**Age**

Contact's age. The value can be calculated if a date is entered in the Birthday field.



**Birthday**

Field for the birthday of the contact. The age field is calculated from this date. Refer to [Date Field Type](#).

**Call Back**

Date field which may be used to enter a call back date. A select can be performed on this field to select all contacts to be called on a particular day. The date finder is available for this field. Refer to [Date Field Type](#).

**Cat/Sts**

Two user-defineable list box fields that allow you to identify what category a contact belongs to as well as the current status of the contact. *Instructions for defining the list items are in the **User's Guide** under **Category/Status Fields**.*

**Contact**

The name of the contact. This may be a person or a firm, depending on how the information is to be organized. This field is the primary index field for the record.

**Date Field Type**

All date entries must be in the format specified in your Windows international settings (typically in the form of "7/15/92"). In addition, you may enter a time *after* the date in the format specified in your Windows international settings (typically like "8:15 am"). Make sure you place a space between the date and time. Note that once a date is entered, it will be displayed after a disk read in the format specified in your Windows configuration.

**Date Finder**

Identified as a button with ellipsis ( ... ) to the right of a date field. This button activates a popup calendar which allows any date to be found quickly. *Ex: The date for "next Monday", or "two weeks from today".*

**Fax**

The contact's fax number. This field will accept extra characters and alpha characters, such as an extension or an international phone number might require.

**Firm**

Field for the name of the contact's firm. If a firm name is used in the Contact field, the contact's name can be entered in this field. There is room for additional characters beyond the displayed area of this field (40 chars. max).

**Address**

The street address of the contact's firm. There is room for additional characters beyond the displayed area of this field (40 chars. max.).

**City**

The city of the contact's firm. There is room for additional characters beyond the displayed area of this field (25 chars. max.).

**State**

The state of the contact's firm. There is room for additional characters beyond the displayed area of this field (15 chars. max). The extra space is useful for international addresses or when you wish to use a full state name.

**Zip**

The zip code of the contact's firm. There is room for additional characters beyond the displayed area of this field (25 max). The extra space is useful for international addresses.



## **Flags**

A series of eight check boxes which can be used. The accompanying text is user-defineable. Flag fields can be used to notate additional information about a contact (EX: a flag titled "ASP" which would be checked if the contact was a member of the Association of Shareware Professionals). *Instructions for setting up the accompanying text are in the **User's Guide** under **Flag Fields**.*

**Home (Phone)**

The home phone number of the contact. This field will accept extra characters and alpha characters, such as an extension or an international phone number might require.

**Home (Address)**

May be used in any way you see fit. There is room for additional characters beyond the displayed area of this field (40 chars. max). See the *Tips and Tricks* section of the *User's Guide* for suggestions.

**Address**

The street address of the contact's home. There is room for additional characters beyond the displayed area of this field (40 chars. max.).

**City**

The city of the contact's home. There is room for additional characters beyond the displayed area of this field (25 chars. max.).

**State**

The state of the contact's home. There is room for additional characters beyond the displayed area of this field (15 chars. max). The extra space is useful for international addresses or when you wish to use a full state name.

**Zip**

The zip code of the contact's home. There is room for additional characters beyond the displayed area of this field (25 max). The extra space is useful for international addresses.

**Last Call**

The date of the last call with this contact. The date finder is available for this field. Refer to [Date Field](#)  
[Type](#) for more information on the entry format for this field.

**Mobil (Phone)**

Mobil phone number for the contact. This field will accept extra characters and alpha characters, such as an extension or an international phone number might require.

**Modem (Phone)**

Modem phone number for the contact. This field will accept extra characters and alpha characters, such as an extension or an international phone number might require.

**Notes**

Notes for the current contact. Accepts up to 64,000 characters. A text search can be performed from the Select dialog for any text entered into the notes field.

**Other (Phone)**

Any other phone number for the contact that you wish to track. This field will accept extra characters and alpha characters, such as an extension or an international phone number might require.



**Phone (Work)**

The contact's work phone number. This field will accept extra characters and alpha characters, such as an extension or an international phone number might require.

## Menus

The following section outlines all menus and menu items in InContact. Each menu is described in a separate section and the menu items for each are explained within the appropriate section.

Some of the menu items duplicate commands which are also accessible through the main window of the program in the form of icons or buttons. These icons and buttons are described in this manual in the section on the [Control Bar](#). Many of the menu items also have quick key commands which are described in the ***Tips and Tricks*** section of the ***User's Guide***.

[File](#)

[Edit](#)

[View](#)

[Contact](#)

[Options](#)

[Tools](#)

[Setup](#)

[Help](#)

## File Menu

The File menu contains commands which relate to the use of InContact data files. This menu also includes commands for printing InContact data.

### Use

This option allows you to specify an InContact data file to use. A file selector allows the user to change subdirectories or drives if necessary.

### New

Create a new InContact data file. The user must supply a filename. A file selector is available for this dialog.

### Print Letters

Print form letters for the contacts on file. Current, selected, or all contacts may be used. The user must enter a filename for the document to print from, or use the file selector. InContact can use the output from most word processors as the document 'template' for form letters. *See **Letters in the User's Guide** for instruction on setting up document templates.*

### Print Labels

Use to print labels for any record in the current data file. Labels can be printed for the current record, all records, or for the records currently selected. To print only selected records, make sure you have performed your select *before* printing labels. Allows modification of the provided label formats for total customization. User can also create new label formats and save them for future use. *For more information on printing labels, see **Labels in the User's Guide**.*

### Print Reports

Use to print reports for contacts or call logs. A report can be printed for all, current, or selected records. To print only selected records, make sure you have performed your select *before* printing. User has the ability to select a font, change filenames (for previously saved formats) and specify a title. A list of fields allows total customization of each report. *For more information on printing reports, see **Reports in the User's Guide**.*

### Exit

This command exits the InContact program. If any changes have been made to the current contact, you will be reminded and have the opportunity to save your changes.

## **Edit Menu**

This menu contains the general editing commands found in Windows. These commands apply only to text changes made within the text fields.

### **Undo**

Undo the last text change made. This option does *not* apply to multiple or non-text changes on the current contact. You may use the Cancel Changes option (or the Escape key) to revert a contact back to how it was last stored.

### **Cut**

Remove highlighted text and put in the Windows clipboard for placement elsewhere.

### **Copy**

Copy highlighted text to the Windows clipboard for placement elsewhere.

### **Paste**

Place the text from the Windows clipboard at the current cursor position.

## **View Menu**

This menu contains commands which relate to the display of the main window of InContact. Each menu item corresponds to a portion of the InContact screen. Using a toggle method, portions of the screen may be turned on and off. To remove a portion of the screen, simply select it from the View menu. All items default to the ON position. These commands do not affect the data of the records themselves, only the display window. The user may freely turn portions of the display on and off without losing data. Note that InContact will also remember your configuration after you exit the program.

### **Control Bar**

Turns the Control Bar on and off. *Refer to the Control Bar section of this manual.*

### **Phone Numbers**

Turns the display of the Phone, Fax, and Home fields on and off.

### **Optional Phones**

Turns the display of the Mobil, Modem, and Other fields on and off.

### **Address**

Turns the display of the address fields in both the Firm and Home on and off. This includes the City, State, and Zip fields.

### **Notes**

Turns the Notes section of the display on and off.

### **Last Call Info**

Turns the display of the Last Call, Call Back, Birthday, and Age fields on and off.

### **Flags**

Refers to the user-defined flag fields. Select this command to turn the display of these fields on and off.

### **All Information**

Display all fields.

### **Minimum Information**

Display only the contact, category/status, phone, fax and home fields.

## **Contact Menu**

This menu contains commands which relate to the creation, editing, and storing of individual records. Some of these commands are duplicated on the control bar for your convenience.

### **Store Record**

Save the information on the current record, or to save any changes made to the current record. If the record is not stored, InContact will not save the new record.

### **Cancel Changes**

Cancel any text changes made to the current record. Applies only to changes made **after** the last time the record was saved.

### **Add**

Add a new record to the data file. The fields clear and all contact options except for Store and Cancel become inactive until the the new contact is stored or the operation is canceled.

### **Locate**

This option allows you to easily locate a record. A list of all contacts on file will allow the user to select the appropriate record.

### **Next**

Move to the next record in the data file, relative to the current record. Similar to the page up/page down function of some programs.

### **Previous**

Move to the previous record in the data file, relative to the current record. Similar to the page up/page down function of some programs.

### **Delete**

Allows user to delete records in the file. User may delete current, selected or all records.

### **Select**

Directly calls the Select dialog without going through the locate dialog.

## Options Menu

This menu contains commands relating to advanced functions of InContact. These include call logging, attaching files, and letter printing. *For more information about using these functions, see the **User's Guide**.*

### Attach File

Attach a file to the current record, or use a file already attached to the current record. *See the **Attached Files** section of the **User's Guide** for more information.*

### Call

Activate the call logging function or place a call using the autodialer. InContact logs the call based on the phone numbers from the current record, or a new number can be entered in the provided input box. *See the **Call Logging** section of the **User's Guide** for more information.*

### Quick Letter

Print a form letter for the current, selected or all contact records. A filename for the form letter's document template will be required. *See **Letters in the User's Guide**.*

### Log File

All letters, calls, and exports for a given contact are tracked automatically. This option pulls up that list.

## **Tools Menu**

This menu contains commands which allow the user to install and access utilities for use with InContact.

This includes proprietary utilities for exclusive use with InContact and outside programs such as Calculator or Notepad. Installing a tool allows it to be accessed from this menu while using InContact.

*For more on installing and using utilities, see the **Tools** section of the **User's Guide**.*

## **Modify Menu**

Install a tool for use with InContact. A new menu item will be added to the Tools menu to allow direct access to the tool.



## Setup Menu

This menu contains commands which allow the user to change various program settings. These include program preferences, the category/status items, and the flag fields.

### Preferences

Calls the Preferences dialog which allows the user to change various program settings such as those for the modem (if applicable). The user can also change various setting that affect memory usage and file handling. *For more information, see the **Preferences** section in the **User's Guide**.*

### Category/Status

Allows the user to define the items in the Category and Status list boxes. *For more information, see the **Dialogs** section in this manual.*

[Category/Status Dialog](#)

### Flags

Allows the user to define the text for the flag fields. *For more information, see the **Dialogs** section in this manual.*

[Flags Dialog](#)

## **Help Menu**

This menu contains commands which access the online help and startup screens of InContact.

### **Current Item**

Select this option to receive help on the currently highlighted item (or cursor position).

### **Table of Contents**

Select this option to call the online help system, which allows the user to browse any section of the help information.

### **Index**

Help topic index.

### **About**

Information about InContact.

### **Shareware Info**

Calls the Shareware Info screen which can be displayed at the startup of InContact via the opening screen.

### **Overview**

Calls the Overview screen which is displayed when exiting InContact.

### **Legal Notice**

Calls the Legal Notice screen which is displayed when installing InContact.

## Dialogs

The following section outlines all dialog windows in InContact. The use of each dialog is explained. The dialogs are in alphabetical order, by title. *For additional information on the functions accessed through the dialogs, see the **User's Guide**.*

[Attached Files](#)

[Call](#)

[Call In Progress](#)

[Category/Status](#)

[Date Finder](#)

[Export](#)

[File Selector](#)

[Flags](#)

[Import](#)

[Label Format \(modify\)](#)

[Locate \(contact\)](#)

[Log](#)

[New Contact File](#)

[Preferences](#)

[Print Labels](#)

[Print Letters](#)

[Print Report](#)

[Select \(contacts\)](#)

[Use Contact File](#)

[Utility Module Install](#)

## Attached Files

Menu: Options | Attached Files

This dialog has a list of files which are attached to the current contact record. The View button allows the user to view the selected file. There are also buttons to attach a new file, modify a file's settings, or detach a file from the current record. *For more information on attaching and using attached files, see the **Attaching Files** section in the **User's Guide**.*

### Attach

Attach a new file to the current contact record. User is prompted for a description and file name. The file selector is available. In the Attached Files list, the description (not the filename) is displayed for each attached file.

### Modify

Modify the description or filename of the selected attached file. The file selector is available.

### Detach

Detach a file from the current contact record. The file *is not* deleted, only removed from the list. The detach is confirmed before execution.

### Find

Search for a file in the attached files list. Any text may be entered from the description of the file you wish to find.

## **Call**

Menu: Options | Call

Log a phone call for the current contact record. Cancel button aborts the operation.

### **Dial Number**

An input box is provided to manually enter a new phone number or the user may select a phone number from the current contact records. The choices are work, fax, home, mobil, modem, or other.

### **Start**

Pull up the Call in Progress dialog. Logs the call information in the log file for the current contact. *For more on the Call in Progress dialog, see Call In Progress dialog later in this manual.*

### **Auto Dial**

Instructs the modem to dial the number entered in the Dial Number input box. Modem will dial number exactly as entered by the user, and using parameters set up in the Preferences dialog.

## Call In Progress

Menu: Options | Call | Start Call button

The Call In Progress window will time and log results from a call. An indicator in the top left corner shows the elapsed time for the call.

The center portion of the dialog has choices to denote the outcome of the call. Any number of choices may be selected. The user can also pause the call and end the call. The call will be logged in the Log File.

## Category/Status

Menu: Preferences | Category/Status

The user can specify the items for the Category/Status lists. Select Category or Status and the items entered (if any) will be displayed in the list box. The user can add, modify, or delete list box items.

## **Date Finder**

Called By: Ellipsis Button (next to a date field)

Use the date finder to find and enter a date into selected fields. The date finder is called by an ellipsis button which is located to the right of a date field. A calendar view of the current month and year is displayed. Scroll bars allow the user to change the month and year.



## **Export**

Menu: File | Export

Use to export contact data to another program. Select most fields used by InContact. The file will be exported in ASCII-Delimited format. The user selects the fields to export, the delimiters for the file and the filename to export to. InContact will save the export format for future use.

## File Selector

Called By: Ellipsis Button (next to an input box for a filename)

The file selector is used in many areas of the program. Wherever a filename is required, a file selector is usually available. The file selector will sometimes be called by a browse button (button with ellipsis) if it is not already on the screen.

The file selector is much like file selectors in other Windows programs. A list of files from the current directory is shown. The user can also change directories or drives if necessary. Sometimes InContact will fill in a file extension based on the function the file selector was called from. *EX: InContact will automatically list all \*.CNT files when in the Use File dialog.*

## Flags

Menu: Preferences | Flags

Use to define the flag fields. User may caption the flags in any way desired. Limit of 10(?) characters per flag title. In each of eight input boxes, enter the text for each flag field. *For more information on using flag fields, see the section called **Flag Fields** in the **User's Guide**.*

## Import

Menu: File | Import

Use to import data from another program into InContact. InContact imports ASCII files that are delimited by commas, tabs, quotes/commas, or line feeds. The user can select the file to import, the delimiters for the file, and the fields to put the data into. InContact will save the import format for future use.

## **Label Format (modify)**

Menu: File | Print Labels | Modify button

Allows the user to enter a description for the label format, and set page dimensions (length and width), page margins, label margins, and the number of labels across. The option to print a test page is available.

## Locate Contact

Menu: Contact | Locate

A list of all contacts in the current file, sorted alphabetically by contact name (or the contents of the contact field). The user can scroll through the list and highlight the desired contact. The Select button allows the user to perform a select. A flag titled Show Selected Contacts allows the user to view a list of previously selected contacts. *For more information on Selects, see **Performing Selects in the User's Guide**.*

## Log

Menu: Options | Log

A list of all calls made, letters printed, and export performed for the current contact. Entries may be deleted using the Delete button provided. For more information on the log see **Log File** in the **User's Guide**.

## **New Contact File**

Menu: File | New File

Use to create a new file for InContact. The user must enter a name for the new file, or select a file to use. The user can make sub-directories, and change the drive or subdirectory with the file selector.



## Preferences

Menu: Setup | Preferences

Change various program settings for InContact. Options available to change program path, select General program settings, and set modem information for call logging.

## **Print Labels**

Menu: File | Print Labels

Use to print labels from the contact information. The user can select contacts to print a label for (all, selected, or current), the address to print (work or home), the label format to use and the font style. The user can also modify label formats.

## Print Letters

Menu: File | Print Letters

Use to print form letters for the current contact file. The user must enter the filename of the document to use for the form letters or use the file selector. The user can then select the contacts to print (all, selected, or current). There is also a check box to indicate whether the document template is an ASCII (text only) file. *For more information on form letters, see the **User's Guide**.*

## Print Report

Menu: File | Print Report

Use to print reports from the current contact file. The user can select the contacts to print, the fields to print, the print style and the date range for the report. InContact will save the report format for future use. For more information on printing reports see **Reports** in the **User's Guide**.

## Select (contacts)

Menu: Contact | Locate | Select button -or- Contact | Select

Use to perform a select by any combination of the following criteria: text search, call back and last call fields, category, status, birth date, and flag fields. The date fields allow a range of dates to be selected. The proper items must be selected for the category/status and flag fields. Exact text must be entered for the text search. The user may select from all records or the current select list, and specify which contacts to select: matches or exceptions. *For more information on selects, see **Performing Selects** in the **User's Guide**.*

## Use Contact File

Menu: File | Use File

Load an InContact file for use. The user can enter the filename desired, or use the file selector. The user can also change directories and drives, and make directories.

## Utility Module Install (Add/Modify)

Menu: Tools | Modify Menu

Use to install extension modules or tools for use with InContact. The user can enter a title (used on the menu) and a filename for the new tool. The user can also specify whether InContact should: pass filenames, use a fixed file extension, pass contact information, or pass other command line instructions to the other program. New tools will be listed as menu items on the Tools menu. *For more on using extension modules and utilities with InContact see **Tools** in the **User's Guide**.*

## Control Bar

In the following section, the control bar is outlined. The control bar contains buttons that allow the user to quickly access some of the main functions of InContact such as printing form letters, etc. Most of these functions can also be carried out with menu or keystroke commands. The control bar is located beneath the menu bar on the main window of InContact. It can be toggled on or off via the View Menu.

### Total Records Indicator

The first item on the control bar is a total records indicator. This number indicates how many total records are in the current file. It is displayed as "*Total: 99*".

### Scroll Bar

The second item (from the left) on control bar is a scroll bar. This allows the user to quickly scroll through all records in the current file.

### Locate Button

Use the locate button to find a specific record in the current database. Clicking the locate button pulls up a list of all contacts on file, by contact name (or the contents of the contact field). *For more on using the Locate function, see **Locating A Contact in the User's Guide**.*

### Add Button

Use the add button to create a blank record on which to enter the new contact information. Click the store button to save the record.

### Store Button

Use the store button to save the information on the current record, or to save any changes made to the current record.

### Cancel Button

Use the cancel button to cancel any changes made to the current record. Applies only to changes made *after* the last time the record was saved.

### Attached Files Button

Use this button to attach a file to the current contact, or view any file already attached to the current contact. *See the **User's Guide** for more on **Attached Files**.*

### Call Button

Use this button to activate the call logging function. A call can be logged based on the current record. *See the **User's Guide** for more on **Call Logging**.*



**Print Letters**

Use this button to print a form letter for the current contact.

## Index