

# **The Phone Master Help**

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## What Is The Phone Master

The Phone Master is a powerful yet easy to use organizer. It was designed for use by people who need to quickly look up information on a person and help organize data.

### SOME FEATURES

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## CUSTOMIZED LABELS

You can customize all labels in order to use the software your way. To modify a label simply click on the label you would like to change and type the new description. Or use the pull down menu to enable all labels. You may save your work to a label file by choosing "LABELS" and "SAVE" from the pull down menu. If you would like to use the saved labels on a different file you can load the saved label file after you create the new Phone Master file.

#### Note

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To create a new Phone Master file choose "FILE" and "NEW" from the pull down menu.

### REMINDER BOXES

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Reminder boxes are the best way to keep yourself organized! You may use the search feature to reload the list box based on the what you want to see. For example, if you need to call someone tomorrow you can add the name to your directory and click on NEED TO CALL. The next day you can search on the box marked NEED TO CALL. The system will load the selection box with only the names you marked NEED TO CALL. You can also print a standard report on each of the names which match this criteria. You can refresh the selection box with all the names in your file whenever you want.

### AUTOMATIC DIAL

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If you own a modem and have your phone plugged into the modem you can let Phone Master dial the phone for you. You can use the smart directory feature to dial other modems.

### SMART DIRECTORY

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You can use Phone Master to keep track of regular phone numbers (phone numbers of people) AND modem numbers. When you select a modem number and click on the "DIAL" button the Phone Master will bring up a terminal package for you to communicate with! To instruct Phone Master that a number is a host click on the button marked "host."

### SORTS YOUR WAY

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The selection box can sort on any field you would like to, Company Name, Last name,

phone number etc... It can be changed at any time. Since you decide what to call the labels the software can be a powerful organizer! To change the fields select "OPTIONS" and "ENVIRONMENT" and use the pull down selection box to select a new field to select names from. In the environment area you can also change:

- \* Whether to show picture buttons or named buttons.
- \* If you have a modem installed
- \* How to dial (pulse or tone)
- \* Whether or not to dial host or standard numbers.
- \* What (if anything) to dial before and after numbers  
(for example a "9" for an outside line before dialing)
- \* Whether to display names which have no data  
in the list box.
- \* Whether or not to automatically load the clock.

## **And Introducing . . . Dynamic Data Links with the Time Master**

The Time Master is a task list organizer. You can tell the Phone Master to update the tasks in the Time Master when you right click on a reminder box. The Time Masters "to do" list will automatically be updated!

## **Customer Service**

If you have any questions you may contact the author on CompuServe ID: 71357,1341. Messages are scanned for daily and you can expect a speedy response. Or you can call Softlink Software at 201-933-5022. The best time to call is between 6 pm and 12 pm EST.

Under the shareware agreement you should register this software as soon as you decide the software is helpful to you. To encourage you to register the price is low (\$25.95). You will also receive the commercial copy of the Phone Master with many enhancements and The Phone Master for DOS AND a shareware copy of the Time Master. The Time Master is a task organizer which can share data with the Phone Master through easy to use Dynamic Exchange links. So please Register! To register or to find out more about this offer choose "REGISTER" from the menu system.

## Environment

You can use the environment area to customize how you would like the Phone Master setup. To change an option simply click on the icon with the mouse to bring you to the area you need to make modifications. Or you can select the item from the menu system.



Modem Settings



Selection Box Sort



Display Selection

## **Modem Settings**

### [\\* Modem Installed \\*](#)

If Checked

System takes advantage of modem. Allows you to choose a com port.

Info: If your phone is plugged into a modem you can use the Phone Master to dial your phone and dial other modems using the built in communication package. If this is not Checked the option to dial will not be available.

### [\\* Pulse Dial \\*](#)

If Checked

System will dial using a pulse dial instead of tone.

Info: Use this method only if you require pulse dialing.

### [\\* Confirm All Dials \\*](#)

If Checked

The system will ask for confirmation before dialing a number

Info: If this is Checked the system will prompt you with the number it is about to dial and ask for you to confirm a dial. This is an easy way to prevent an accidental dial.

### [\\* Modem Speaker On \\*](#)

If Checked

Sets the modems internal speaker to on.

Info: It is recommended that you leave this unchecked if you do not want to use the modem as a speaker phone.

### [\\* Dial Before Number \\*](#)

If Checked

System dials what you request prior to the number.

Info: This is extremely useful if you must dial a code to get an outside line (on a switchboard). For example if you must dial a "9" to get an outside line you can enter it here and it will dial this before each phone number is dialed.

Helpful Hint: You may use commas "," to cause a pause.

### \* Dial After Phone Number \*

If Checked

Dial a string AFTER it dials the phone number.

Info: Same as above except the string is sent after the phone number is dialed.

### \* Enable Carrier Detect Check \*

If Checked

The system will warn you before dialing that the modem is in use. If this is not checked it will hang up the phone and dial the modem automatically without warning you first.

## Selection Box Sort

You can specify what data should be used in the selection box on the main form. When you first enter the software items are sorted on last names. If you would prefer a different sort (such as company name) all you need to do is select it here. This will become the default sort each time you enter the software.

### \* Show Items Without Data \*

If Checked

Items without data are shown in the selection box.

Info: This box determines whether or not the software should include names in the selection box which do not contain data. For example if you sort on Company Name some items may not have data. If this is left unchecked those names will not appear in the box. If you check this, however, those names will be shown at the top of the list with the persons last name shown and the note that there is no data.

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\* Automatically Load Clock \*

If Checked

The alarm clock automatically executes.



## **Display Selection**

This selection will enable you to make many changes to the way things are displayed. To make a change click on the button to enable it or disable it by clicking a check mark. Click on the OK button when you are finished.

## Custom Reports

The custom report area is a very flexible area allowing you to customize reports as you need them.

The most useful area is the list of labels in the left hand corner. You can use this area to decide which labels (and the text which is displayed next to the label) you would like to show and the order in the report each label will be displayed.

To customize this area use the mouse to drag the labels to the location you would like. For example if you would like to show a label named "Company Name" in the area which is now named "Phone Number" you would simple highlight "Company Name" and drag it over "Phone Number" while holding the left mouse button. The labels will switch locations!

You can specify whether or not to show a label by using the mouse button to determine whether or not it is activated.

As you make changes you can see what a record will look like in the sample report output area.

Under print options you can decide whether or not to include headers and what the headers should state. You can also decide whether you would like a line displayed between each record and what the "separator" character will be. You can also specify whether or not to show page numbers.

The system will calculate the number of records which will fit on a page. However, you can change this number prior to printing.

You may save "custom" files by choosing "FILE" and "SAVE AS" from the menu. This helpful feature will allow you to save different reports based on the type of information you are trying to display!

## **Optional Keyboard**

Novice typists may want to use the optional keyboard input box. This keyboard is displayed instead of a standard input box whenever The Phone Master needs information from you.

You may enter data either by clicking on the keys displayed or entering data into the box using your own standard keyboard.

To activate a capital letter click on the SHIFT button immediately followed by the letter you wish to display. Or you may select the CAPS LOCK key and all letters will be displayed as caps.

You may also use the keyboard to enable or disable caps lock, num lock or scroll lock. Simply click on the appropriate control.

## Terminal Settings

### Baud Rate

Specify the transfer rate of your modem.

Info: Most modems can transmit at more than one baud rate, so check your manual and select one that both systems can handle.

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### Data Bits

Specify the number of data bits in the data packets sent between the two computers.

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### Parity

Specify the parity type.

Info: If you selected 8 data bits in the previous option, select None here.

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### Data Terminal Ready

Use the modem signal to detect a carrier signal that indicates whether the modem is online.

Info: When Carrier Detect is selected, Phone Master Terminal uses the carrier-detect signal to determine whether the modem is online. When Carrier Detect is off, Phone Master Terminal looks at the modem response string to determine whether the modem is connected. If your modem doesn't connect to the remote computer after you have set the other options correctly, try changing this setting and try again.

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### Com Port

Select the communications port your modem uses.

Info: The system checks your environment area to determine which com port to use. You may however use two modems with Phone Master, one for voice and one data communication. If so change the setting here.

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### Stop Bits

Specify the number of stop bits to use.

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### Flow Control

Indicate what Phone Master Terminal should do if the buffer becomes too full to receive more data from the remote computer.

Info: Select RTS if the remote computer uses the hardware method. Select None if the remote computer uses no overflow method. Select XON/XOFF or XON/RTS if you don't know which flow-control method is used and experience trouble.

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#### Input Buffer Size

This property determines how many bytes of data are read each time data is retrieved from the host. Setting this option to 0 specifies that the entire contents of the buffer should be read.

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#### Output Buffer Size

This property determines how many characters (at most) have to be waiting from the host before the Phone Master Terminal sends the data in the buffer.

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#### Keys To Awake

This property determines how many bytes can arrive at the buffer before the Phone Master Terminal "awakes." Only change this number if you experience problems.

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#### Parity Replace Key

The character you enter here will replace any incorrect characters that are received due to a parity error.



## **New Entry**

The phone master works like a card catalog. When you click on this button it is like putting a new card in your card catalog.

NEW

\*\*\* Adding A New Name \*\*\*\*

When you click on this button the system will prompt you for a last name (or whatever the field which was initially called Last Name is now).

## **Printer Setup**

You are shown this screen at two points.

1. When you choose Modify Report Fonts from the menu
2. Prior to printing a job and choosing preview.

You can click on any item on the list and change the font, color and size. You may also choose to have the label or text underlined or displayed as strikethru.

To do this simply click on the area you would like to change and choose FONTS.

If you are in print preview you may also modify the text which is displayed in a cell. Normally, when you print a record, the system will determine what should be displayed. You may want to change this data. To do this simply click on MODIFY and type in the new text. This text will not be saved into the database. It is only changed for display purposes.

Any change you make (except for text changes) will be saved automatically.

You may also decide to use the default labels. If you click on STANDARD the system will load the labels which are displayed when you first install the software.

Choose OK to exit this screen.



## **Search**

The Phone Master has an easy to use search feature. You can search for a name several ways.

- A. Change the column the system shows in the selection box
- B. Select names that have a check box checked
- C. Search for text.

Each of these methods is described below.

### **\* Specifying Which Column To Sort On \***

If you enter environment setup (choose OPTIONS and ENVIRONMENT) you may select which data field you would like to use for loading the names into the selection box (the selection box is the box in the right hand corner used to select names with). When you first install Phone Master the selection boxes loads the last name of each person. You may change this to ANY field.

### **\*\*\*\* Using Check Boxes \*\*\*\***

On the bottom of the form there are six check boxes. You may give these boxes any labels you would like. For example if you are in the tech support field you may want to label each box with a product. That way when a client calls you will know which product he or she needs support on. Or if you are in sales you can assign each client a different rating. Say "Cold Call", "Prospect", "Hot" and "Client". Or if you are simply using The Phone Manager as a phone organizer you may label each box as you would on a phone memo. For Example: "Need To Call", "Reminder" etc...

The power of the organizer comes into play when you use the search capability in conjunction with the check boxes. If you click on the search button you will be given the choice to either search for text (explained below) or search the check boxes. Select the check box control and you will see the name for each of the check boxes. If you select one of the names and choose "search" the system will reload the selection box with ONLY the names which you have checked. You may also specify to print a standard report on each name matched by clicking on PRINT MATCHES.

Important Note: The check box marked "HOST" when you first use The Phone Master (far right box) has a special feature. If you check on this box you are telling the phone master that it will be dialing a modem. If you choose to dial the phone and this box is checked, the Phone Master will bring up a communication package for you to communicate with.

### **\*\*\* Finding an occurrence of text \*\*\*\***

When you click on search you may enter the text you would like to search for. The system will find the first occurrence of the word you supplied and load the name which contains it.





## **Dial The Phone**

Before dialing the phone you need to enter the environment area and set up your modem. After setting up your modem you can simply put your phone number in the top data box holder and click on the DIAL button.

See Also

[Modem Settings](#)



## **Tearsheets**

Clicking on this icon will allow you to print or preview (and modify) a tearsheet of the individual you have selected. This can also be brought up by using the pull down menu system.



## Data Exchange

If you have a copy of The Phone Master and The Time Master you can use the powerful data exchanges between these program to share data.

The Time Master allows you to easily tracks tasks which need to be done. Basically, the Time Master maintains a list of things you need "to do". If you set up a data exchange with the Time Master you can use the right mouse button to exchange data. For example, if you need to make a phone call to a person in your address book you would normally click on the "NEED TO CALL" button with your left mouse button. If you set up a data link you can click on the "NEED TO CALL" button with your right mouse button. This would inform the Time Master to add this to it's "to do" list. The Time Master would immediatly create and entry that would look something like this.

PR	Date	Time	Task
01	03/16/94	03:00 PM	Need To Call: Johnson

When you have completed the phone call you can either mark this "to do" entry as completed in the Time Master (which would inform the Phone Master to remove the check mark) or you can right click on the button in the Phone Master.

Note: The left mouse button works the same as always. It does not notify the Time Master.

### Related Topics

[Creating A Data Exchange Link](#)

## Creating A Data Exchange Link

Setting up a data exchange link is simple. All you need to do is tell the Phone Master where the Time Master is located. If you do not have a copy of the Time Master you can download a copy from your local online service. Or you can register and we will automatically send you a free shareware copy.

To create a Time Master link you should use the pull down menu to select **Time Master Link**. Next you should type in the directory where the Time Master is located. You can click on the BROWSE button to find the directory. After you specify the correct directory the software will find out what database the Time Master is using and configure itself.

You can disable the link by clicking on the link check box.

### Related Topics

[Data Exchange](#)

## Register

Register the Phone Master now and you will receive the commercial copy of The Phone Master! It works with your existing shareware files and includes many great enhancements! It is not available as shareware. We'll also rush you the Phone Master for DOS!

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If you register you will receive:

The latest commercial version (registered in your name) of The Phone Master For Windows!

The Phone Master For DOS. The Phone Master for DOS is great for looking up names when you are not in windows! It has all the major features of the windows version including the ability to view, modify and search your Phone Master database.

A FREE shareware copy of the Time Master with new improved data links!

FREE Support and services!

FREE automatic upgrades! If you download a shareware version of the Phone Master your commercial version will automatically be updated with the newest programming changes!

FREE trial of other products available from Softlink Software.

A commercial grade product without any interruptions!

\*\* Registration costs only 25.95! \*\*

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Easy To Order from the US and Europe:

IN THE USA

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BY MAIL:

Softlink Software  
Phone Master Registration  
81 Jordan Ave.  
Wallington, NJ 07057

Please specify your address, disk size and include \$4 for shipping + handling (\$6 outside the US.) You may click on REGISTER to automate this procedure.

BY COMPUSERVE:

Account #: 71355,470

BY PHONE:

Call 800-242-4775 (outside US: 713-524-6394) and use your Mastercard, Visa, American Express, or Discover card. Or you can send a fax to 713-524-6398. Just state that you would like to order The Phone Master (Product #: 10996).

IN EUROPE

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Phone: 0049-4451-85743

Please don't hesitate to contact us by:

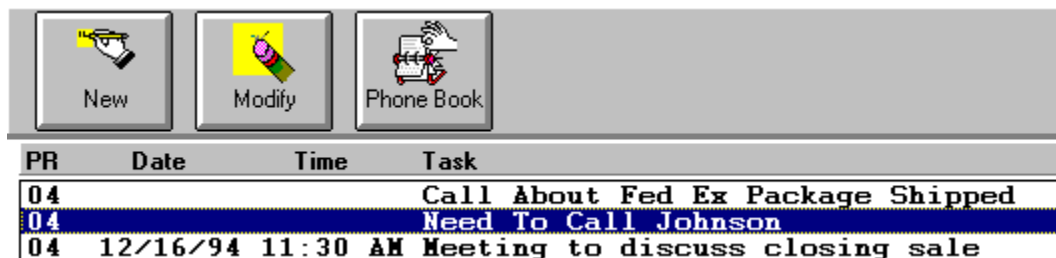
Voice & Fax: 201-933-5022  
CompuServe ID: 71357,1341

#### IMPORTANT NOTE

This is a shareware program and as such you are permitted to distribute it without charge provided that all files are distributed together, and due copyright is observed. This program is provided as is without any warranty, expressed or implied, including but not limited to fitness for a particular purpose.

You may trial this application at no charge for one week. After one week you must register it or discontinue use.

## Displaying Tasks



As shown in the example above you can keep track of tasks from the Phone Master. You can create, modify and display tasks for individuals in your address book if you have a copy of the Time Master and have set up a Time Master Link (see [Creating A Time Master Link.](#))

You can add tasks to the list of tasks by right clicking on a reminder button (see [Data Exchange.](#))

You can also modify and create new tasks by selecting the correct buttons from the toolbar.

To access the Time Master task list you should click on the Tasks toolbar from the main menu. This is a powerful feature displaying powerful DDE links between the two packages.

