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What is IC2?

IC2 is a total information manager for Windows 3.1. It is designed for individual users whose needs might include sales, marketing or customer support. In developing IC2, we at CreatiVision Publishing worked hard to create a program that is powerful **and** easy to use. As a result, we feel that IC2 walks the fine line between flexibility and simplicity. The following items encapsulate the more distinguishing features of IC2:

Flexible

- IC2 has two custom list fields and an unlimited number of custom flags. These fields can be used to track detailed information about your contacts.
- You can customize the data entry aspect of contact management by changing the order of the fields and even hiding those fields you aren't using.

Convenient

- Browse buttons are used frequently to give you a broad range of options on certain entry fields.
- A tool bar gives quick access to commonly used commands and functions by clicking a button with your mouse.
- An auto-capitalize function has been incorporated into the program which capitalizes the first letter of every word in an entry field. It also capitalizes the first word of each sentence in the Notes section.
- The intuitive autodialer makes it easy to place calls to a contact while viewing their record.

Powerful

- Time management has been added to IC2 so that you can accomplish more without leaving the program.
- Form letters are now generated by our own designer program that works with IC2.
- Our report generator allows you to design your own reports in just about any style you want.
- A history file tracks all calls made, letters printed, and all entries from the time management function.
- IC2 allows you to "attach" data files from other programs to any contact record.
- A Tools menu gives you the ability to call outside utility programs from within IC2.
- You can create complex filters to divide your contacts into groups.

For more information, select the topic below:

[How to Use this Help File](#)

How to Use this Help File

The topics in this manual are arranged according to actions you will want to perform, so it should be easy to find the information you need. The chapters and the sections under them are straightforward. Often the most confusing part of a program's documentation is the naming conventions. We have provided a glossary of familiar Windows objects which you can refer to if you need clarification on an item.

Most object names are simply capitalized with no extra formatting. Instead we have tried to note the type of object in addition to the name. Here are some examples:

- To open a file, select Open from the File menu.
- Click the Browse button to select a file.
- Enter a filename into the Format text box.

Occasionally an object name will still be confusing or just long and it will be enclosed in quotes to make the surrounding text easier to read.

Installing IC2

System Requirements

IC2 requires an IBM compatible computer capable of running Microsoft Windows 3.1. It also requires:

- At least 2 MEG of memory available to IC2
- 4 MEG of hard drive space

Hard disk installation is required as the uncompressed files will not fit on a single floppy disk.

Running Setup

You will need to run the Setup program to install IC2 on your computer.

1. Run Windows,
2. Choose the Run command from the File menu in Program Manager,
3. Type A:SETUP (B:SETUP) in the Command Line text box.

Follow the instructions in the Setup program. It will copy the IC2 files to the disk and directory you specify and configure the program for that location. If you have already copied the files to your hard drive (EX: unzipped from a BBS file) you still need to run the Setup program to configure IC2.

Using IC2 requires a basic knowledge of Windows and DOS. If you are new to Windows, please make sure you understand how Windows works before attempting to use IC2. You can run the Windows tutorial from the Help menu in Program Manager. If you find any of the Windows-specific instructions given in this help file confusing you should consult your Windows manual. If you are new to computers in general, please make sure you understand how to use files and records before using IC2. There are many good DOS tutorial programs available.

Using IC2 Data Files

For more specific information, select from the topics below:

[What is an IC2 data file](#)

[Elements of an IC2 file](#)

[Opening an IC2 file](#)

[Creating a New IC2 file](#)

[Saving and Closing an IC2 file](#)

What is an IC2 data file

IC2 creates files based on the Microsoft Access data engine. This means that an IC2 file is compatible with Microsoft Access. All data associated with an IC2 contact file is stored in one physical file. This includes contact, time management, history, and customization information. This makes it easy to move your data from one location to another without losing critical pieces of information.

Elements of an IC2 file

IC2 displays the data in an IC2 file using MDI (multiple document interface) windows. This means that your contact data and time management data are in a separate window when you view an IC2 file. There are four MDI windows in each IC2 file:

- Contact Detail
- Contact List
- Time Manager
- History

These MDI windows can be moved and resized for optimal viewing. They can also be minimized when not in use.

Opening an IC2 file

IC2 files have the filename extension .mdb. When you open a file, the Open file dialog is preset to show the IC2 directory and IC2 data files.

To open an IC2 file

1. Choose Open from the File menu or click the Open File icon,
2. Select the name of the IC2 file in the File Name list box or type the name of the IC2 file into the text box,
3. Click OK

In addition, IC2 tracks the last four files you used and adds their names to the bottom of the File menu. To reopen one of the last files you worked with, you can choose it from the list at the bottom of the File menu.

Creating a New IC2 file

To start a new IC2 file, select New from the File menu. In the text box enter a filename for the new file. Click OK to create the file. Keep in mind that all of the program settings are saved on a file basis, so you will need to set up your special field lists, etc.

Saving and Closing an IC2 file

To Save a File

IC2 automatically saves changes to your data every time you move to a new contact record. To save the file manually select Save from the File menu or click on the Save File button on the toolbar.

To Save a File under another name

Use the command Save As on the File menu to save the current IC2 file under another filename. Enter the new filename in the text box provided.

To Close a File

When you need to close an IC2 file, select the Close command from the File menu. This will save the file if it hasn't already been saved, and close all MDI windows associated with that data file.

Entering and Editing Contact Information

A contact record consists of six tab screens which contain all of the available entry fields for contact information. To move between tab screens you can click the tab label or use the Page Up/Page Down keys. Use your TAB keys to move between fields when you are entering data.

The entry fields in IC2 are very flexible. Most of them allow you to enter characters beyond the displayed area. You can also enter any type of data into most fields. There are many ways to customize your data with IC2 to suit your needs.

For more specific information, select from the topics below:

[Creating a New Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Viewing a Contact](#)

[Contact Field Types](#)

[List of Contact Fields](#)

For related information, select from the topics below:

[Changing the Contact Tab Names](#)

[Changing the Contact Field Layout](#)

Creating a New Contact

To add a new contact record, select Contact from the Insert menu or click the New Record button on the toolbar. IC2 will create a blank contact screen where you can enter data for the new record.

When the new record is completed you can simply move to another record and IC2 will automatically save the new record before displaying the next one. Or you can save the record manually by pressing the Enter key.

Editing a Contact

You can edit any contact record simply by displaying it and making the desired changes. When you move to a new record your changes will be saved automatically. If you want to save the record manually, press the Enter key.

IC2 also has the standard Windows editing commands on the Edit menu. These are Cut, Copy, Paste, and Delete. They work as expected.

Deleting a Contact

If you want to delete a contact, you have several options:

- Highlight the desired contact in the Contact List window and press the Delete key.
- Display the contact you wish to delete in the Contact Detail window and select Delete Item from the Edit menu or click the Delete Item toolbar button.

Viewing a Contact

There are several ways to view individual contact records. You can select the desired contact from the Contact List. You can also use the control bar at the top of the Contact Detail window to move between records.

View a Contact using the Contact List

1. From the View menu select Contact List to open the MDI window for the Contact List,
2. Click on the desired contact to select it from the list,
3. Select Contact Detail from the View menu to view the contact information for that contact.

View a Contact using the Contact Detail control bar



- Use the line/arrow buttons to move to the first and last record in the database.
- Use the double arrow buttons to move ahead or back 10 records from the current position
- Use the single arrow buttons to move ahead or back 1 record from the current position.
- Use the anchor button to "mark" a contact
- Use the arrow/anchor button to return to the "marked" contact

Contact Field Types

Text Fields

Text fields allow you to enter any data you wish. This is especially useful on the address fields so that international addresses can be entered.

Date Fields

Date fields expect a date only, and it must be entered in the same format that is specified in your Windows settings.

If you are unsure what your date format is, or you wish to change your date format, you can access Control Panel (CONTROL.EXE) from the Tools menu in IC2 or the Main program group in Program Manager.

Phone Number Fields

Phone Number fields will accept any data you wish to enter. If you plan to use the autodialer however, you will want to make sure you include the area code. Leave out any extra characters which the autodialer may not be able to interpret, slashes and dashes are OK. Long distance codes and dial out prefixes can be specified in the Autodialer options.

For related information, select the topic below:

[Using the Autodialer](#)

Notes Fields

All notes fields allow up to 32,000 characters to be entered.

Combo Box List Fields

You can select an item from a combo box list using your mouse. Or you can type the proper item into the text box. You can also hit the ALT + DnArrow key to display the list and use the UpArrow and DnArrow keys to select the desired item.

Flags Field

The flags field allows you to select multiple items from those listed. You can select them with your mouse or enter the first letter of an item and toggle it on and off with the space bar. The arrow keys work in this field to allow you to scroll through the listed items.

For related information, select the topic below:

[List of Contact Fields](#)

List of Contact Fields

First Name: The first name of your contact

Last Name: The last name of your contact

Company: The company name of your contact

Title: The title of your contact

Greeting: A greeting to use for form letters

Address 1: Line one of your contact's street address

Address 2: Line two of your contact's street address

Address 3: Line three of your contact's street address

City: The city of your contact's address

State: The state of your contact's address

Zip: The zip code of your contact's address

Country: The country of your contact's address

Alt Address 1: Line one of your contact's alternate street address

Alt Address 2: Line two of your contact's alternate street address

Alt Address 3: Line three of your contact's alternate street address

Alt City: The city of your contact's alternate address

Alt State: The state of your contact's alternate address

Alt Zip: The zip code of your contact's alternate address

Alt Country: The country of your contact's alternate address

Email: An email address for your contact

Alt Email: An alternate email address for your contact

Phone: Your contact's work phone number

Main Phone: Use for the company's main phone number

Fax: Your contact's fax number

Beeper Phone: A beeper number for your contact

Portable Phone: A number for your contact's portable phone

Home Phone: A home phone number for your contact

Modem Phone: A modem number for your contact

Travel Phone: A number for your contact while out of town

Other Phone: Extra phone number field

Notes: Enter up to 32K of notes for your contact

Category: Select the appropriate item from the list

Status: Select the appropriate item from the list

Flags: Select all items that apply to your contact from this list

Last Call: Enter the date the current contact was last called

Call Back: Enter the date you wish to call the current contact back. This can also be accomplished by creating a ToDo after a phone call.

Birthday: Enter the birthday of the current contact

Age: Age is automatically calculated from the Birthday field

Spouse: Enter the name of your contact's spouse

Anniversary: Enter the date of your contact's anniversary

Child 1: Enter the name of your contact's child

Child 1 Birthday: Enter the birthday of Child 1

Child 2: Enter the name of your contact's second child

Child 2 Birthday: Enter the birthday of Child 2

Child 3: Enter the name of your contact's third child

Child 3 Birthday: Enter the birthday of Child 3

Social Security: The social security number of your contact

Drivers License: The drivers license number of your contact

Customer ID: The customer ID number of your contact

Time Manager

The Time Manager in IC2 allows you to schedule timed events such as appointments as well as create ToDo items. It is displayed in an MDI window called Time Manager. The Time Manager window is a list of all events and ToDo's in the current file. Events and ToDo's are each in a separate list within the same MDI window. To view the Time Manager window, select Events or ToDo List from the View menu.

The rows and columns for Event and ToDo lists can be resized for optimum viewing. IC2 will remember how you have configured the Time Manager window. You can also change the font for the Time Manager window by selecting Font from the Format menu. This calls the standard font dialog.

For more specific information, select from the topics below:

[Scheduling an Appointment or Event](#)

[Deleting an Event](#)

[Creating a ToDo Item](#)

[Deleting a ToDo Item](#)

[Viewing Options](#)

For related information, select the topic below:

[Changing the Window Layout](#)

Scheduling an Appointment or Event

To create an event, select Event from the Insert menu. A dialog box appears which allows you to enter the information about the event. If you are currently in the Contact Detail window or the Contact List window, the contact name will be automatically entered in the With Whom field. This makes scheduling an event with the current contact quick and easy!

What

Enter a brief description for the event. Or you can click the Browse button for a list of previously used entries for this text box.

Duration

Enter a duration for the event in the format HH:MM where HH is the hour and MM is the minutes (Ex: 1:00). You can also use the spin buttons to increase/decrease the duration by 15 minute increments.

When

Enter a date and time for the event in the proper date and time format (EX: 01/01/94 02:30pm). The date/time format should agree with your Control Panel settings. Or you can click the Browse button to pull up the Date & Time dialog box and select the date and time. You can also use the spin buttons to select a value for the date and time.

For related information, select the topic below:

[Using the Date & Time Dialog](#)

With Whom

Enter a name in the text box or use the Browse button to select a contact from the Contact dialog.

Notes

Enter any notes which apply specifically to this event.

Done

Check this box when the event is completed.

Alarm

Create an alarm for this event. From the option buttons, choose On, Off or Early Ring. Early ring will ring at the interval specified in your options.

For related information, select the topic below:

[Setting Other Options](#)

When you have entered all the appropriate information for the event, click the OK button and it will be added to the Event list in the Time Manager window.

Note: When you click OK on an event that is checked "Done", it may be noted in the History window depending on your Options settings.

Deleting an Event

To delete an event from the Time Manager window, select the desired event and press the Delete key. You can also click the Delete Item button on the Toolbar, or select Delete Item from the Edit menu.

Creating a ToDo Item

To create a ToDo, select ToDo from the Insert menu. A dialog box appears which allows you to enter the information about the ToDo.

What

Enter a brief description for the ToDo. Or you can click the Browse button for a list of previously used entries for this text box.

Priority

Enter a number from one to nine to set a priority for this ToDo. You can also use the spin buttons to select a value.

With Whom

Enter a name in the text box or use the Browse button to select a contact from the Contact dialog.

When

- Enter a date for the ToDo in the proper date format (EX: 1/01/94). The date format should agree with your Control Panel settings.
- Or click the Browse button to pull up the Date & Time dialog box and select the date.
- There are also spin buttons to allow you to select a date.
- You can also click the A.S.A.P. button to automatically enter today's date in the text box.

For related information, select the topic below:

[Using the Date & Time Dialog](#)

Notes

Enter any notes which apply specifically to this ToDo.

Done

Check this box when the ToDo is completed.

When you have entered all the appropriate information for the ToDo, click the OK button and it will be added to the ToDo list in the Time Manager window.

Note: When you click OK on a ToDo that is checked "Done", it may be noted in the History window depending on your Options settings.

For related information, select the topic below:

[Setting Other Options](#)

Deleting a ToDo Item

To delete a ToDo item from the Time Manager window, select the desired item and press the Delete key. You can also click the Delete Item button on the Toolbar, or select Delete Item from the Edit menu.

Viewing Options

Today

To see the events and ToDo's for the current day, click the Today button on the control bar of the Time Manager window. You can also select Today from the View menu.

Browse

This calls the Date & Time dialog where you can select the date you want to view in the Time Manager window. You can also select Browse from the View menu.

The Contact List

The Contact List is a list of all contacts in the current file. It is displayed in an MDI window called Contact List. The contact list uses a type of display called a grid, which looks much like a spreadsheet.

The rows and columns can be resized for optimum viewing. IC2 will remember how you have configured the Contact List window. You can also add and remove fields so that only those you wish to see will be displayed. In addition, IC2 will allow you to change the font for the Contact List window from the Format menu.

For related information, select from the topics below:

[Changing the Window Layout](#)

[Customizing the Contact List](#)

The History Window

The history window is a list of all events, ToDo's, calls, data exchanges, reports printed, form letters printed and labels printed that have occurred with the current file. You can add your own items to the history as well. It is displayed in an MDI window called History. The history window uses a display type called a grid, which looks much like a spreadsheet. The rows and columns can be resized for optimum viewing. IC2 will remember how you have configured the history window.

Most items are added to the history window automatically. Events and ToDo's are noted in the history window as soon as they are marked DONE. All other actions are noted as soon as they are completed. You can change what items are tracked in the history window by changing the settings in your options.

For related information, select the topic below:

[Changing the Window Layout](#)

Creating a History Entry

To create a history entry, select History Entry from the Insert menu. A dialog box appears which allows you to enter the information about the history entry. If you are currently in the Contact Detail window or the Contact List window, the contact name will be automatically entered in the With Whom field.

What

Enter a brief description for the history entry. Or you can click the Browse button for a list of previously used entries for this text box.

Duration

Enter in a duration for the history entry in the format HH:MM where HH is the hour and MM is the minutes (Ex: 1:00). You can also use the spin buttons to increase/decrease the duration by 15 minute increments.

When

- Enter a date and time for the history entry in the proper date and time format (EX: 01/01/94 02:30pm). The date/time format should agree with your Control Panel settings.
- Or click the Browse button to pull up the Date & Time dialog box and select the date and time.
- You can also use the spin buttons to select a value for the date and time.

For related information, select the topic below:

[Using the Date & Time Dialog](#)

With Whom

Enter a name in the text box or use the Browse button to select a contact from the Contact List.

Notes

Enter any notes which apply specifically to this history entry.

Results

Enter a brief summary of what happened in one or two words to make this item easy to identify later.

When you have entered all the appropriate information for the history entry, click the OK button and it will be added to the history list in the History window.

Viewing Options

Today

To see all the history items through the current day, click the Today button on the control bar of the History window. You can also select Today from the View menu.

Browse

This calls the Date & Time dialog where you can select the date you want to view in the History window. You can also select Browse from the View menu.

Note that the History window works much like the Time Manager in reverse. While the Time Manager focuses on the future, the History window documents the past.

Using the Autodialer

The autodialer can be used if you have a modem in your computer and want to have it dial calls for you. You will need to set up your modem in the Options before you can use it. After that you can use the autodialer any time to dial numbers based on the current contact record.

For more specific information, select from the topics below:

[Placing a Call](#)

[Ending a Call](#)

For related information, select the topic below:

[Setting up the Autodialer](#)

Placing a Call

To place a call with the autodialer, select Place Call from the Tools menu. A dialog will appear which will list all available phone numbers for the current contact. You can type a number into the Number text box, or select the desired number from the list. If the call is long distance, click the Long Distance check box. This will dial the area code plus any long distance code you have set up in the Options. If you need to change the Options settings, click the Options button.

Click OK to start dialing and initiate the call. A message box will appear when it's OK to pick up the receiver. Once you click OK on this message box IC2 will begin timing the call. You may resume normal operations of the program until you are ready to end the call. This includes editing the contact detail during your conversation.

For related information, select the topic below:

[Setting up the Autodialer](#)

Ending a Call

When you are ready to end the call, select "Place Call" again from the Tools menu. A dialog box will appear which allows you to log the results of your call.

When the call is over, click the Stop Timer button to stop timing the call. The length of the call is displayed below the stop timer button. You are now ready to log the results of your call.

Results

In the Results section there are six option buttons from which you can select an appropriate result. There is also a Notes field to notate extended information about the call.

Options

The Options section has two check boxes. The first allows you to create a "call back" ToDo item for this contact. The second allows you to specify whether you want this call noted in the History file.

Abort a Call

If you want to abort the call, click the Forget Call button. The call will be cancelled and will not be noted in the History file.

Stop Timer

IC2 allows you to stop the timer as often as you like. It will continue running the timer until you click the OK button to complete the call. If you decide to continue timing after clicking the Stop Timer button, simply click the Cancel button. This will cancel the dialog and IC2 will continue timing the call. You can do this as often as you wish. Click the Cancel button anytime you want to exit the End Call dialog without aborting the call.

Saving Changes

Click OK to confirm your selections and complete the call.

Attaching Files to an IC2 Contact

IC2 allows you to "attach" a non-IC2 file to an IC2 contact. This is a good way to keep track of letters, invoices and other documents that are associated with your contacts. IC2 will keep track of the filenames and let you to add your own description. This allows you to maintain files related to a contact without having to remember filenames. IC2 will launch the program and load the proper file for you.

For more specific information, select from the topics below:

[Attaching a File to a Contact](#)

[Viewing an Attached File](#)

[Modifying the Settings for an Attached File](#)

[Detaching a File from a Contact](#)

Attaching a File to a Contact

To attach a file to an IC2 contact, select Attachment from the Insert menu. A dialog box appears which allows you to create a new attachment for the current contact.

Label

Enter a description for the file to be attached. This description will be used in the list of attached files.

Filename

Enter a path and file name for the file to be attached. IC2 will load this file into the appropriate program when you want to view this file. You can click the Browse button to select the desired file using a File Selector dialog box.

When you have entered the information for the file to be attached, click the OK button to attach the file. Click the Cancel button to abort the operation.

Note: In order for IC2 to run the right program there must be an association for that file type in Windows. Associations are based on the extension of a filename. Ex: a ".TXT" file is a Notepad file. IC2 would run Notepad if you selected a ".TXT" file to view. To create a new association, run File Manager and select Associate from the File menu.

Viewing an Attached File

To view a file that is attached to the current contact, select Attachments from the View menu. From the list of attached files, select the one you want to view. Click the View button to run the proper program and load the selected file.

Modifying the Settings for an Attached File

To modify the IC2 settings for a file attached to the current contact, select Attachments from the View menu. From the list of attached files, select the one you want to modify. Click the Properties button to display the settings for the attached file. A dialog box appears which allows you to edit the settings for the selected file.

Label

A text description of the attached file. This description will be used in the list of attached files.

Filename

The path and file name for the file currently attached. IC2 will load this file into the appropriate program when you want to view the file. You can click the Browse button to select a different file using a File Selector dialog box.

When you have entered the information for the attached file, click the OK button to save your changes. Click the Cancel button to abort the operation.

Note: In order for IC2 to run the right program there must be an association for the desired file type specified in Windows. Associations are based on the extension of a filename. Ex: a .TXT file is a Notepad file. IC2 would run Notepad if you selected a .TXT file to view. To create a new association, run File Manager and select Associate from the File menu.

Detaching a File from a Contact

To detach a file which is currently attached to a contact, select Attachments from the View menu. Select the file to be detached from the list of attached files. Click the Detach button to detach the file from the current contact. This process does not delete the file that is being detached.

Using the Date & Time Dialog

The Date & Time dialog box allows you to visually select the date and time you want for a given date field. This dialog box is accessible from many places in the program. Generally, wherever you need to enter a date or a date and time, a Browse button which calls the Date & Time dialog is available. You can select the date and time you want and the Date & Time dialog will fill in the current date field using the date and time selected.

For more specific information, select the topic below:

[Elements of the Date & Time Dialog](#)

Elements of the Date & Time Dialog

Date/Time

A text box which displays the current date or current date and time based on where it was called from. You can type in a new date and time or select them using the calendar display and spin buttons.

When you select a date from the calendar display it is automatically entered into this text box. Use the spin buttons to set the time. The "H" spin buttons increment and decrement the hour. The "M" spin buttons increment and decrement the minutes in fifteen minute intervals.

Calendar Display

The graphical calendar display shows the current month with the current day selected. The spin buttons on the left of the calendar display are used to increment and decrement the month displayed. The spin buttons on the right of the calendar display are used to increment and decrement the year displayed. In addition:

- Dates in black are future days or today
- A date with an underline is the current date
- Dates in gray have already occurred
- Weekdays are bold
- Weekends are not bold
- Dates with a gray background are not in the current month

Today button

Click the Today button to set the Date/Time text box to the current date. This also displays the current date and month on the calendar display.

Once you have selected the date and time click OK to return to the field from which the Date & Time dialog was called.

Using the Copy Special command

The copy special command will copy data from a field or fields that you specify to the Clipboard. You can then paste the data into another Windows application. Copy special uses data from the current contact. This is a good way to quickly take data from a contact in IC2 and paste it into another application, such as a word processor or fax program.

To copy data from the current contact to the Clipboard, select Copy Special from the Edit menu. A dialog will appear which allows you to select the fields to copy. Simply select a field and click the Copy Field button to move it to the Buffer box. You can also double click the desired field to move it to the Buffer box. Fields can be selected in any order.

When you have chosen all of the fields to be copied, you can reformat them in the Buffer box. The Buffer box works like a text editor. Simply move fields around where you want them. When you are ready to copy the data to the Clipboard, click the OK button.

Note: IC2 will retain the contents of the Buffer box for later. When you move to another contact and select Copy Special again, you can just click the OK button to use the same fields for the new contact.

Using the Toolbar

The toolbar in IC2 gives you quick access to frequently used commands and actions. Individual buttons can be removed if you like.

For related information, select the topic below:

[Customizing the Toolbar](#)

Toolbar Buttons

File Actions



Open File: Calls the Open File dialog box

Save File: Calls the Save File dialog box

New File: Calls the New File dialog box

Print: Calls the Print dialog box

Exchange Data: Calls the Exchange Data dialog box

Edit Actions



Cut to Clipboard: Places the currently highlighted text to the Clipboard

Copy to Clipboard: Places a copy of the currently highlighted text in the Clipboard

Paste Clipboard: Inserts the contents of the Clipboard at the current cursor position

Delete Selected: Deletes the highlighted text or item(s)

Find Data: Calls the Find dialog box

New Item: Creates a new item

Edit Item: Allows you to modify the current item

Delete Item: Deletes the current item

View Actions



Apply Filter: Calls the Filter dialog box

Place Call: Calls the Autodial dialog box

View Contact Detail: Activates the Contact Detail window

View Contact List: Activates the Contact List window

View Time Manager: Activates the Time Manager window

View History: Activates the History window

View Alarm: Displays the next pending alarm

View Tools: Calls the Tools menu dialog

Custom Actions



These buttons are configurable. They will call the first four tools on the Tools menu. You can create and rearrange Tool menu items to take advantage of these custom buttons.

Customizing IC2

For more specific information, select from the topics below:

[Setting up the Special Field Lists](#)

[Changing the Contact Tab Names](#)

[Changing the Contact Field Layout](#)

[Changing the Window Layout](#)

[Customizing the Toolbar](#)

[Customizing the Contact List](#)

[Setting up the Autodialer](#)

[Setting Other Options](#)

Setting up the Special Field Lists

To set up the special field lists, select Special Field Lists from the Format menu. The Special Field Lists dialog box will appear which has a tab layout similar to that of the Contact Detail window. There are three special fields lists: Category, Status and Flag. Each of these has its own tab screen. Simply select the list you wish to set up.

Adding a New Item

To add a new item to a special field list click the Add button. Then enter the desired text into the text box called Label. Click OK when you are done and the item will be added to the list.

Editing an Existing Item

To edit an existing list item, select the item you want to change and click the Edit button. Enter the new text into the text box called Label. Click OK when you are done and the item will be changed.

Discarding a List Item

To discard or delete an item from the list, select the item you want to discard and click the Discard button. The item will be removed from the list.

You can move to other tab screens and change other special field lists during the same session. Click the OK button when you have completed all changes to the special field lists.

Changing the Contact Tab Names

You can change the names of the tab labels on the Contact Detail window by selecting the Contact Tabs item from the Format menu.

The Contact Tabs dialog allows you to change the names of all six tab labels in the text boxes provided. Click the OK button to confirm the changes.

Changing the Contact Field Layout

You can change the order or placement of fields on the Contact Detail window. To do this select the Field Layout item from the Format menu.

The Field Layout dialog allows you to hide, show or move any of the available fields for all tab screens. By moving fields in the Field list, you can place it in a desired tab screen or position within that screen.

Moving a Field

Select the desired field name in the Field list and use the Move Up or Move Down buttons to change its position. By moving up or down past a section, you can move a field to another tab screen.

Hiding a Field

Select the desired field name in the Field list and click the Hide button. The field will be moved to the Hidden section at the end of the list.

Showing a Field

Select the desired hidden field name from the Hidden section and click the Show button. The field will be moved to the top of the Field list. Once there, move it to the tab screen you want.

Changing the Window Layout

All of the MDI windows in IC2 can be resized to the configuration you want. IC2 will remember the changes you've made.

In addition, the Contact List, Time Manager and History windows all use a similar interface which is called a grid. The grid elements can be resized and IC2 will remember the changes you make. Most notably, you will probably want to change the size of the rows and columns.

To change the size of a column, use your mouse to move the divider located in between the column names. Each column can be resized in this manner.

To change the size of a row, use your mouse to move the divider located in between the row names. When you resize one row, all the others are also resized to the same length.

The Time Manager window also has a divider between the ToDo and Event sections which can be moved up or down.

Customizing the Toolbar

To customize the toolbar, select Options from the Tools menu. Click the Customize tab label to select the Customize tab screen. In the group box called Toolbar is a list of available tool buttons.

Adding a Tool button

To add a tool button to the toolbar:

1. Select it from the list,
2. Click the Make Button Visible check box,
3. To put a space after the selected tool button click the "Put Space After Button" check box

Removing a Tool button

To remove a tool button from the toolbar:

1. Select it from the list,
2. Uncheck the Make Button Visible check box,
3. Spaces can be removed in the same manner

Customizing the Contact List

Contact List Layout

To customize the layout of the contact list, activate the Contact List window (select Contact List from the View menu). Then select List Layout from the Format menu. A dialog appears which allows you to select the fields you want to show in the Contact List.

To Select Fields

1. From the Available Fields list box, select the field you want to see.
2. Click the Show Field button to move that field to the Visible Fields list box. You can also double click the field to move it to the Visible Fields list box.
3. Repeat this process for each field you want to show in the Contact List.

To Change Field Order

1. To change the order of the fields in the Visible Fields list box:
2. Select the field you want to move
3. Click the Move Up button to move the field up in the list box.
4. Click the Move Down button to move the field down in the list box.

IC2 will display the fields in the Visible Fields list box in order from left to right. The first field selected will be on the left of the Contact List window, and so on. When you are satisfied with the fields you've selected and their order, click the OK button to confirm the changes.

Contact List Font

To change the font for the Contact List, select the Font command from the Format menu. When you select this command the standard Windows font dialog box will appear. On this dialog you can set the font, font style, font size, effects such as underline and strikethrough, and the color. A display box on the bottom right of the dialog shows a sample of the font currently selected. Once you have made your selections click the OK button to apply the font to the Contact List window. IC2 allows you to select only one font style for the Contact List.

Setting up the Autodialer

To set up the options for autodialing using IC2, select the Options command from the Tools menu. Click the Autodial tab label to select the Autodial tab screen. There are three sections on the Autodial tab screen:

Settings

- **On:** Click this option button to turn the autodialer on using touch tone dialing
- **Off:** Click this option to turn the autodialer off
- **Pulse:** Click this option to turn the autodialer on using pulse dialing

Dialing

- **Local Area Code:** Enter one or more local area codes into this text box. IC2 will ignore these area codes when dialing a number.
- **Dial-Out Prefix Code:** Enter any access codes you need to use to reach an outside line.
- **Long Distance Code:** Enter a calling card number or long distance access code into this text box.
- **Secret Code:** Use this check box to hide the calling card number in the Long Distance Code text box. When this box is unchecked the code will be cleared from the field.

Modem Settings

- **Port:** Select the comm port used by your modem from this drop down list box.
- **Speed:** Select a speed for your modem from this drop down list box. Slower speeds are more reliable.
- **Initialize:** If needed, enter an initialization string for your modem into this text box.
- **Reset:** If needed, enter a reset command to pass your modem into this text box.

Setting Other Options

To set other options within the program, such as the AutoLoad or Auto-Capitalize features, select Options from the Tools menu. The Options dialog will appear which has a tab layout similar to that of the Contact Detail window. There are four option screens: General, User Info, Customize and Autodial. Simply click the tab label you wish to access.

General

Auto Open

Check and uncheck any of the four boxes which correspond to the four MDI windows in IC2: Contact Detail, Contact List, Time Mgr. and History. When a box is checked, that window will be loaded when a file is opened in IC2. When a box is unchecked, that window will not be loaded when a file is opened. This allows you to save time when opening a file by not loading the MDI windows you use less frequently. You can load any MDI window at any time by clicking its button on the toolbar.

Auto Log

Check and uncheck any of the four boxes which correspond to the items which can be tracked by the History window. These include Phone Calls, Completed ToDo items, Completed Events and Printed Letters and Labels. When a box is checked, that item will be tracked in the History window. When a box is unchecked, that item will not be tracked.

Auto Capitalize

Select On or Off from the option buttons to activate/deactivate the Auto Capitalize feature.

User Info

The only field that is required is the Product License number, which is given to registered users of IC2 and deactivates the shareware messages and the "Unregistered" text in the title bar of the program. IC2 will run without the Product License number, but it will display the shareware messages.

Your Complete Name

Enter your name in this text box.

Company Name

Enter the name of your firm in this text box.

Mailing Address

Enter your complete address in these text boxes.

Product License

Enter your product license number in this text box.

Phone Number

Enter your phone number in this text box.

Customize

Alarms

Enter the number of minutes you wish to be notified prior to an event in the Early Alarm input box. Enter a filename for a sound file in the Play Sound File input box if you wish your alarm to use a

sound file.

Spin Buttons

Use the scroll bar to increase or decrease the repeat rate you wish IC2 to use for all spin buttons in the program.

Toolbar

Select a button from the list. Check the "Make Button Visible" box to show that toolbar button on the toolbar. Uncheck to hide the selected toolbar button. Check the "Put Space After Button" box to place a space after the selected toolbar button. Uncheck to remove the space after the selected toolbar button.

When you have made all of the desired changes to the Options dialog, click the OK button to accept or the Cancel button to abort.

Using Filters

Filters allow you to create groups of contacts which meet one or more criteria that you specify. Once created, a filter can be saved and used again. This makes targeting specific groups of contacts for reports, labels and form letters very convenient.

For more specific information, select from the topics below:

[Applying a Filter](#)

[Creating a New Filter](#)

[Changing a Filter](#)

[Discarding a Filter](#)

[Using Advanced Filters](#)

Applying a Filter

To use a filter, select Apply Filter from the View menu. A dialog appears with a list of filters that have been created. Simply select a filter and click the OK button. You can select more than one filter if you wish. Once the filter has been applied, the Contact Detail window and the Contact List window will show only those records that met the search criteria from the filter (s). To remove the filter and show all contacts, select Use All Data from the View menu.

Creating a New Filter

To create a new filter, select Apply Filter from the View menu and click the New button. Enter the following information for the filter:

- **Label:** Enter a description for the filter. This description will be used in the filter list.
- **Field:** Select a field to use for the filter.
- **Equal To:** To search for a direct match (es) in the specified field, enter one or more values to search for in this text box. Put each value on its own line.
- **High Value:** If you want to search for a range of values within the field selected, enter the high value in this text box.
- **Low Value:** If you want to search for a range of values within the selected field, enter the low value in this text box.

The high and low value fields allow you to search for a range within the specified field. This is good for selecting fields that fall into a specific date or zip code range. The Equal To field searches for a direct match within the specified field. This allows you to do searches for one or more states in the State field, as an example.

Note: You may not combine a High Value/Low Value with an Equal To search. Also, if you enter a High Value you don't need a Low Value (or vice versa).

Changing a Filter

To change or edit an existing filter, select Apply Filter from the View menu. From the list of filters, select the filter you want to edit and click the Properties button. The Filter dialog will appear and allow you to make changes to the existing filter criteria. When you have made all of the desired changes, click OK to save the filter.

Discarding a Filter

To discard or delete a filter, select Apply Filter from the View menu. Select the filter you want to discard from the list. Click the Discard button to delete the filter.

Note: If you simply want to view all of your contacts again after applying a filter, you do not need to discard the filter. Instead select Use All Data from the View menu to restore your contact list to all contacts.

Using Advanced Filters

If you feel limited by the constraints of the Filter dialog, you may enter a specific SQL (Structured Query Language) WHERE-clause by clicking the Advanced button on the Filter dialog.

The dialog unfolds a multiline text box where you can specify a variety of filter conditions.

Note: If you are not familiar with SQL, approach this filter option with the spirit of experimentation. Being advanced, it is not forgiving. While an incorrectly-phrased filter will not damage data, it may cause you frustration. Proceed with care. If you have problems, stick with normal filters.

SQL allows you to specify complicated selection conditions by combining a few simple phrases into a single statement. The language is simple, but it takes some adjustment to get fluent.

When entering an advanced filter, remember to put brackets "[]" around each field name. IC2 allows fields with spaces and this notation is required to denote those fields.

Note: This SQL differs from ANSI. If you are used to "%" and "_" for multi- and single-character wildcards, don't use them here. The "*" and "?" characters are used instead. This makes the SQL more consistent with DOS and UNIX operating system wildcards.

[field name] = value

This phrase specifies that the field must completely match the value.

[field name] > value

[field name] < value

This phrase specifies that the field must be greater or less than the value, respectively. Similar to the items on the dialog.

[field name] LIKE "wildcard value"

This phrase is similar to Equal, but it allows you to specify non-exact matches by using wildcards in the value. For example:

[first name] LIKE "Tim"**

would give you names like Tim, Timothy, etc.

In contrast, the "?" wildcard specifies a single-character replacement. For example:

[first name] LIKE "T?m"

would return names like "Tim" and "Tom", but not "Tommy", etc.

You can place the "*" and "?" wildcards anywhere in the value parameter as many times as you wish.

[field name] BETWEEN value AND value

This phrase is a simple replacement for a combined ">" and "<" statement.

[field name] IS NULL

[field name] IS NOT NULL

These phrases allow you to specify whether a field is simply filled-in or not.

Combining Statements

By using the "AND" and "OR" operators you can combine simple phrases into more complex filters. For example:

[age] >= 18 AND [state] = "TX"

would give you every adult that lives in Texas.

[age] >= 18 OR [state] = "TX"

By contrast, the "OR" operator would give you all adults across any state, plus and non-adults living in Texas with the above statement. As you can see, "OR" should be used carefully. For example:

([age] >= 18 AND [state] = "TX") OR [state] = "CA"

would give you adults in Texas and everyone in California. You can group parenthesis "(" ")" in any logical order to clarify a statement.

Note: This is a simple explanation of SQL statements. If you have any difficulty getting the hang of it, get an inexpensive book on the subject or stick with more simple filters. This feature is not intended for novice SQL users!

Finding and Sorting Data

For more specific information, select from the topics below:

[Finding a Contact](#)

[Sorting Your Contacts](#)

Finding a Contact

This function in IC2 works much the same as the Find command in a word processor. IC2 will search for a text string in any one field you specify. It will locate the next or previous contact that contains the text and allow you to move to each contact one at a time.

To Find a Contact

1. Select the Find command from the Edit menu,
2. Select the field you want to search from the list of fields called "In This Field",
3. Type the text you want to search for into the text box called "This Data"

To Begin Searching

1. Select the Next or Previous button,
2. To locate the next contact which contains the desired text, click the Next button,
3. To locate the previous contact which contains the specified text, click the Previous button.

The Next and Previous buttons will search relative to the current contact position. IC2 will only search for the text in the field you selected.

Note: IC2 will search the records in the current filter unless Use All Data is selected.

For related information, select the topic below:

[Using Filters](#)

Sorting Your Contacts

You may want to sort your contact records when you are printing a report, labels or form letters. IC2 will sort the contacts currently in the contact list. If you have a filter in use when you do a sort, only the contacts in the filter will be sorted. To sort all records select Use All Data from the View menu.

Performing a Sort

To perform a sort, select Sort Contacts from the View menu. A dialog will appear with a list of all fields in the database.

1. Select a field to sort by from the list
2. Then select a sort order, ascending or descending, from the option buttons. If you choose ascending the data in the field selected will be sorted from smallest to largest item. If you choose descending the data in the selected field will be sorted from largest to smallest item.
3. To begin the sort click the OK button. You can view the results in the Contact List window.

The Tools Menu

IC2 lets you customize the Tools menu by adding or changing menu items. Each menu item can be set to run a specific program, much like a icon in the Windows Program Manager.

For more specific information, select from the topics below:

[Adding a Tool](#)

[Changing a Tool](#)

[Removing a Tool](#)

[Setting Custom Toolbar Buttons](#)

[Creating a Divider](#)

[Moving a Tool](#)

Adding a Tool

Select the Menu Properties item from the Tools menu. The Tool Menu Properties dialog lists all the tools currently defined. Click the New button to enter a Tool in the Tool Properties dialog.

Label

Enter exactly what you want to see in the Tools menu for this new Tool. Make the label short and descriptive.

Note: You can place a "&" before a character in the label to create a menu "accelerator". This makes it easier to select the menu item with the keyboard. EX: "&File" would look like "File" on the menu.

Command Line

Type a command line for Windows to run. This is typically a program name, but you can specify options for that program as well. You can browse for any program by clicking the Browse button.

Run State

Select a run state from the option buttons:

- **Normal:** Run the program at normal size
- **Minimized (Icon):** Run the program minimized
- **Maximized (Full Screen):** Run the program maximized

Note: New tools are added to the bottom of the Tools menu. To move a tool, see "Moving a Tool".

Changing a Tool

Select the Menu Properties item from the Tools menu. The Tool Menu Properties dialog lists all the tools currently defined. Select a tool from the list and click the Properties button. Make changes to the Tool properties and click the OK button to store your changes.

Removing a Tool

Select the Menu Properties item from the Tools menu. The Tool Menu Properties dialog lists all the tools currently defined. Select a tool from the list and click the Delete button. The selected Tool will be removed.

Setting Custom Toolbar Buttons

The Custom Toolbar buttons (A-D) can each launch one Tool on the menu. The custom buttons correspond to the first four items on the Tools menu. To have a tool menu item that is launched by a custom toolbar button, move it to one of the first four positions on the Tools menu.

Note: Changes made to Tool properties take complete effect only after you click OK on the Tool Menu Properties dialog.

Creating a Divider

To create a divider between menu items, select Menu Properties from the Tools menu. The Tool Menu Properties dialog lists all the tools currently defined. Click the New button to enter a divider in the Tool Properties dialog. In the Label text box, type in a dash (-) character. Click the OK button to create the divider. To reposition the divider, use the Move Up and Move Down buttons.

Moving a Tool

To move an existing tool or divider on the Tools menu, select Menu Properties from the Tools menu. Select the menu item you want to reposition from the list. Click the Move Up button to move the menu item up by one position. Click the Move Down button to move the menu item down by one position. Continue in this manner until the item is in the position you want.

Designing a Report Format

(Run IC2RPT.EXE from the IC2 program group)

IC2 comes with its own designer which allows you to design simple report formats. It does not support graphics. If your reporting needs are complex, IC2's data files are compatible with commercial report writing programs.

For more specific information, select from the topics below:

[Creating a New Report Format](#)

[Saving a Report Format](#)

[Working with Report Format Files](#)

For related information, select the topic below

[Printing](#)

Creating a New Report Format

To design a new report format, select New from the File menu. IC2 generates a blank form each time you run the Report Format designer program. Once you have a blank form you can simply insert the fields you want into your report.

Inserting a Field

To insert a field into the report, select Field from the Insert menu. A dialog will appear with a list of available fields:

1. Select a field from the list,
2. To change the font, click the Font button,
3. To set the alignment of the field, select Left, Right, or Center from the option buttons.

The field will appear to the right of the field that is currently selected. Simply click the new field and drag it to the desired position.

Making Changes to a Field

If you need to make changes to a field once it is in place on the screen, simply click on the field and select Field Properties from the Format menu. You can also double click on the field with to activate the Field Properties dialog box. If you want to change the font, click the field with your right mouse button.

Inserting Text

To insert text into your report, select Text from the Insert menu. This calls the Properties dialog (same as when you select Field from the Insert menu). Enter the following information in the dialog box that appears:

1. Enter the text you want to insert in the text box called Label,
2. Click the Font button to change the font,
3. Select Left, Center, or Right from the option buttons to set the alignment of the text.

The text will appear to the right of the field that is currently selected. Simply click the text box and drag it to the desired position.

Editing Commands

The report designer has an Edit menu with the standard Windows editing commands to help you edit your report format. All commands work as expected:

- **Cut:** Places the highlighted item into the Clipboard
- **Copy:** Places a copy of the highlighted item into the Clipboard
- **Paste:** Places the contents of the Clipboard at the current cursor position.
- **Delete:** Deletes the highlighted item.

Setting the Page Format

To set the page format for your report, select Page from the Format menu. A dialog will appear with text boxes for the various margin settings. Simply type in the desired margins, in inches.

Page Settings

- **Top:** Enter a measurement for the top margin
- **Bottom:** Enter a measurement for the bottom margin
- **Right:** Enter a measurement for the right margin
- **Left:** Enter a measurement for the left margin
- **Page Width:** Enter the width of the page
- **Header Height:** Enter a height for the header of the report
- **Body Height:** Enter a height for the body of the report
- **Footer Height:** Enter a height for the footer of the report

The body height determines how many records will be printed per page. IC2 will subtract the other dimensions from the page height and will calculate how many repetitions of the body height measurement will fit within the remaining space. One record is printed per body height, so it may help you to think of the body height measurement as a "row" height.

Note: One thing to keep in mind when designing a report is that when you are ready to print, IC2 will use the default printer and default printer settings that are specified in Print Manager. If these settings are not appropriate, your report will not print right. You may want to be sure to double check your Print Manager settings **before** printing.

For related information, select the topic below:

[Printing](#)

Saving a Report Format

When you have completed the report format and you are ready to save it, select Save from the File menu. You will need to type in a filename for the new report format. Click the OK button to save the file.

If you want to save an existing report format under a new filename, select Save As from the File menu. Type the new filename into the text box and click OK to save.

Working with Report Format Files

To view or edit an existing report format, select Open from the File menu. Select the report format you want to work with and click OK to load it into the report designer.

To close a report format file, select Close from the File menu. You can then open another file or start a new report format file.

Designing a Label Format

(Run IC2LBL.EXE from the IC2 program group)

IC2 comes with its own designer which allows you to design simple label formats. It does not support graphics or multiple font styles.

For more specific information, select from the topics below:

[Creating a New Label Format](#)

[Saving a Label Format](#)

[Working with Label Format Files](#)

For related information, select the topic below:

[Printing](#)

Creating a New Label Format

To design a new label format, select New from the File menu. IC2 generates a blank form each time you run the Label Format designer program. Once you have a blank form you can simply insert the fields you want into your label.

Inserting a Field

To insert a field into the label, place the cursor at the position you want the field to be and select Field from the Insert menu. A dialog appears which allows you to select the desired field. Click OK to insert the field at the current cursor position.

Inserting Text

To insert text into your label, place the cursor at the position you want the text to appear and enter the desired text. You can edit the label as you would any word processed document.

Editing Commands

The label designer has an Edit menu with the standard Windows editing commands to help you edit your label format. All commands work as expected:

- **Cut:** Places the highlighted item into the Clipboard
- **Copy:** Places a copy of the highlighted item into the Clipboard
- **Paste:** Places the contents of the Clipboard at the current cursor position.
- **Delete:** Deletes the highlighted item.

Setting the Page Format

To set the page format for your label, select Page from the Format menu. A dialog will appear with text boxes for the various margin settings. Simply type in the desired margins, in inches.

Page Settings

- **Top:** Enter a top margin for the page/sheet
- **Bottom:** Enter a bottom margin for the page/sheet
- **Right:** Enter a right margin for the page/sheet
- **Left:** Enter a left margin for the page/sheet
- **Label Height:** Enter the height of the label
- **Label Width:** Enter the width of the label

It is recommended that you leave some space around the edges of the label when adding and moving fields on the label form. This is to insure that you don't experience run-over of data when the labels are printed.

Note: One thing to keep in mind when designing a label is that when you are ready to print, IC2 will use the default printer and default printer settings that are specified in Print Manager. If these settings are not appropriate, your labels will not print right. You may want to be sure to double check your Print Manager settings **before** printing.

For related information, select the topic below:

[Printing](#)

Saving a Label Format

When you have completed the label format and you are ready to save it, select Save from the File menu. You will need to type in a filename for the new label format. Click the OK button to save the file.

If you want to save an existing label format under a new filename, select Save As from the File menu. Type the new filename into the text box and click OK to save.

Working with Label Format Files

To view or edit an existing label format, select Open from the File menu. Select the label format you want to work with and click OK to load it into the label designer.

To close a label format file, select Close from the File menu. You can then open another file or start a new label format file.

Designing a Form Letter

(Run IC2LTR.EXE from the IC2 program group)

IC2 comes with its own text editor which allows you to design simple form letters. It does not support graphics or multiple fonts per letter. If your form letter needs are complex, see the section on Alternate Methods.

For more specific information, select from the topics below:

[Creating a New Form Letter](#)

[Saving a Form Letter](#)

[Working with Form Letter Files](#)

[Alternate Methods](#)

For related information, select the topic below:

[Printing](#)

Creating a New Form Letter

To start a new form letter, select New from the File menu. IC2 generates a new form each time you run the Form Letter designer. Once you have a new form, simply type in the text you want for your form letter. IC2 automatically wraps the text according to the size of the window, but this does not affect how the form letter will print.

Inserting a Field

To insert a field into the form letter, place the cursor at the position you want the field to be and select Field from the insert menu. A dialog will appear with a list of available fields. Select a field from the list and IC2 will insert it into your form letter.

Inserting a Page Break

To insert a page break into your form letter, place the cursor at the desired position. Select Page Break from the Insert menu, and a page break will be inserted. When the form letter is printed the page break will begin a new page on the printer.

Inserting the Full Address

The insert menu has a command called Full Address which will insert a predefined set of fields at the current cursor position. These are the fields that will be inserted:

- First Name [space] Last Name
- Title
- Company
- Address 1
- Address 2
- Address 3
- City [comma] [space] State [space] Zip
- Two blank lines
- Greeting [or] First Name [comma]

The greeting line will use the contents of the greeting field, or if not available, the first name field.

Inserting a Date

The Insert menu has two date formats which can be inserted into your form letter. One is a long date and one is a short date. The long date will be the same one specified in your Windows Control Panel (typically in the format: January 1, 1994). To insert it in your form letter select Long Date from the Insert menu. The short date will also be the same one specified in your Windows Control Panel (typically in the format: 1/1/94). To insert it in your form letter select Short Date from the Insert menu.

Editing Commands

The form letter designer has an Edit menu with the standard Windows editing commands to help you edit your form letters. All commands work as expected:

- **Cut:** Places the highlighted text into the Clipboard
- **Copy:** Places a copy of the highlighted text into the Clipboard
- **Paste:** Places the contents of the Clipboard at the current cursor position.
- **Delete:** Deletes the highlighted text.

Selecting a Font

To specify a font for your form letter, select Font from the Format menu. When you select this command the standard Windows font dialog box will appear. On this dialog you can choose the font, font style, font size, effects such as underline and strikeout, and the color. A display box on the

bottom right of the dialog shows a sample of the font currently selected. Once you have made your selections click the OK button to apply the font to your form letter. IC2 allows you to select only one font style per letter.

Setting the Page Format

To set the margins for your form letter, select Page from the Format menu. A Margins dialog will appear with text boxes for the top, bottom, left and right margins. Simply type in the desired margins, in inches. The margins are applied at print time to the selected printer page size. All text is wrapped at that time to fit the page.

One thing to keep in mind when designing a form letter is that when you are ready to print the form letters, IC2 will use the default printer and default printer settings that are specified in Print Manager. If these settings are not appropriate, your letters will not print right. You may want to be sure to **double check your Print Manager settings before printing.**

For related information, select the topic below:

Printing

Saving a Form Letter

When you have completed the form letter and you are ready to save it, select Save from the File menu. You will need to type in a filename for the new form letter. Click the OK button to save the file.

If you want to save an existing form letter under a new filename, select Save As from the File menu. Type the new filename into the text box and click OK to save.

Working with Form Letter Files

To view or edit an existing form letter, select Open from the File menu. Select the form letter you want to work with and click OK to load it into the form letter designer.

To close a form letter file, select Close from the File menu. You can then open another file or start a new form letter file.

Alternate Methods

If you have a favorite word processor and your needs are more advanced, you can combine the best of both IC2 and a top word processor.

Print Merge

If you need to produce a mailing of a complicated letter or brochure, you can merge IC2 data into your favorite word processor.

Note: Please read the manual of your word processor before attempting this procedure. Make sure you understand what your program wants before proceeding!

IC2 can export two types of ASCII files as well as DBF (xBase) files in any field arrangement you need.

For related information, select the topic below:

[Exchanging Data with Other Applications](#)

Using Copy Special

You can move entire contacts to your word processor to print a quick letter. The simple method is the Copy Special command on the Edit menu. This dialog lets you create a "mass-data" layout for copying many fields to the clipboard for pasting into your word processor.

Creating Paste Links with DDE

If you want to create a more lasting relationship between a document and IC2 fields, you may use a Paste Link:

1. Select a field,
2. Select the Copy command from the Edit menu,
3. From your word processor, click the Paste Special or Paste Link menu commands in its Edit menu. You may be asked what type of special data to paste. If so, pick something that mentions "Link".

Thereafter, your word processor document will display the data from the current IC2 contact record. Change records in the Contact Detail window, and the data also changes in your document.

Note: The standard "Write" program that comes with Windows will not use text paste links. It will only accept graphics. Also, consult your word processor's manual extensively for any of these alternate methods.

Printing

The printing process in IC2 is relatively simple. Reports, form letters and labels are all printed from the same dialog box. You select the output you want and choose a format file and you're ready to print.

For more specific information, select the topic below:

[Setting up a Print Job](#)

Setting up a Print Job

To print a report, form letters or labels select Print from the File menu. If you wish to use a filter or sort order you need to apply it before printing. All other settings can be specified in the Print dialog.

Select the Output

From the Output option buttons, select the desired output: Letters, Labels or Reports.

Choose a Format

To select or change the format file, click the Layout button. Depending on the output you've chosen, a file selector dialog will display all available format files for that output. For example: if you have selected Labels from the Output option buttons, a file selector of the available label format files will be displayed. Select the one you want to use and click OK to continue. To create a new format use the designer program for that layout.

For related information, select one of the following:

[Designing a Report Format](#)

[Designing a Label Format](#)

[Designing a Form Letter](#)

Selecting a Printer

To select or change printers click the Printer button. This calls the standard Windows Print Setup dialog. From here you can select the printer to use and set the paper size, orientation and source.

For information on using the Print Setup dialog, refer to your Windows manual.

Exchanging Data with Other Applications

The exchange data function allows you to use your IC2 data with other applications. It also lets you copy data from one IC2 file to another. If you are sharing data with another IC2 file, you can share all information between files. If you are exchanging data with another application you can share only contact data.

To perform a data exchange, select Exchange Data from the File menu. From the Exchange Data dialog select an action from the option buttons. You can choose to Copy (Export) or Merge (Import) records.

For more specific information, select from the topics below:

[Copy \(Export\)](#)

[Merge \(Import\)](#)

Copy (Export)

If you select Copy, you will be asked to give a filename to export data into. You can either select a file from the list or enter a filename into the text box to create an export file. Click OK to continue.

Once you have given an export filename, the Map Fields dialog will appear. This is where you define the format for the export file.

Map Fields

1. Select a field from the Available Fields list,
2. Click the Show Field button to move the selected field to the Output list. You can also double click the selected field to move it.
3. Repeat for each field to be exported.

Rearranging Fields

Since the fields in the Output list will need to be in a certain order for the other application, you may need to rearrange fields in the Output list.

- To move a field up in the Output list, select it and click the Move Up button
- To move a field down in the Output list, select it and click the Move Down button.
- To remove a field from the Output list, select it and click the Hide Field button.

Selecting an Output format

You will need to select a file format for the export file from the drop down list box. Here are the formats that IC2 supports:

- ASCII, Comma-Separated Values
- ASCII, Tab Delimited Fields
- DBF, xBase-Compatible

Click the OK button to begin the export process.

Merge (Import)

If you select Merge, you will be asked to give a filename to import. Information will be read from the import file and added to the current file. You can select a file from the list or enter a filename as long as it is an existing file. Click OK to continue.

Once you have selected the file to import the Map Fields dialog will appear. IC2 will attempt to read the import file and display the first record in the Input Field Data list box. If IC2 does not read the file properly you will not be able to import that file.

Here are the formats that IC2 supports:

- ASCII, Comma-Separated Values
- ASCII, Tab Delimited Fields
- DBF, xBase-Compatible

Mapping Fields

When you have a usable data record in the Input Field Data list box you can begin mapping fields with IC2 fields.

1. Select a field or data entry in the Input Field Data list box,
2. Select the corresponding IC2 field in the Matching Field list,
3. Repeat until all imported fields are mapped.

Click the OK button to begin importing records.

Glossary

arrow pointer: A mouse cursor which resembles an arrow

access key: Usually an ALT key plus character combination which can be used to choose menu names, menu commands, dialog box options and command buttons.

check box: An object that can be checked and unchecked to represent ON or OFF. When checked (ON) an X appears in the box.

combo box: A list box that allows the users to type directly in the text box.

document window: An Multiple Document Interface (MDI) window within the main program window.

drop down list box: A list box that does not allow the user to type into it. The drop-down arrow opens the list box.

entry field: A box where text is to be entered. Also called an input box or text box.

group box: A box which contains a set of related options or text boxes. A group box often has a description or title at the top left.

hourglass pointer: Indicates that the current action is taking some time to complete.

list box: A list box that displays items the user can select.

menu bar: A list of menus across the top of a window.

menu name: A menu title in the menu bar which indicates the purpose of the commands on that menu.

option buttons: A group of small round buttons that appear in a group box or dialog box. Only one option in the group can be selected at a time.

pane: A section in a split window. Usually has its own scroll bars.

scroll arrow: The directional arrows which can be used to move a scroll box in a scroll bar.

scroll bar: Allows the user to scroll through a document or list of items. The directional arrows can be used to move the scroll box or the scroll box can be dragged to the desired location.

scroll box: The box in a scroll bar which indicates the current position in a document or list. Can be dragged to the desired location.

shortcut key: Used to activate a frequently used command without opening the menu containing the command.

sizing controls: The minimize and maximize buttons at the top right of each window

sizing handles: Appear on the border of a selected object which can be resized. Also denotes which object has focus.

spin box: Controls a cycle of values in a text box. The user can click an arrow to raise or lower the value.

status bar: A bar at the bottom of an application window which displays a message line to the user about the current object or action.

tab label: The top of a tab screen which looks like a tab on a file folder. The user clicks the tab label to select a tab screen.

tab screen: A screen of entry fields with a tab label. To switch tab screens the user can click the tab label.

text box: A box where text is to be entered. Also called an input box or entry field.

title bar: The top bar of a window or dialog box.

toggle command: A menu item that can be turned on or off. If the item is on it is denoted by a check mark or bullet.

window border: The outer edges of a window that the user can resize.

Copy Special Dialog

Field: A list of fields available to be copied to the Clipboard

Buffer: A list of fields that have been selected to be copied to the Clipboard

Copy Field Button: Click to add the selected field to the Buffer list

OK: Click to copy the fields in the Buffer list to the Clipboard

Cancel: Click to abort

For more specific information, select the topic below:

[Using the Copy Special command](#)

Find Dialog

This Data: Enter the text to search for

In This Field: Select the field to search, only one may be selected

Next Button: Click to find the next record that contains the specified text

Previous Button: Click to find the previous record that contains the specified text

Cancel: Click to abort the search

For more specific information, select the topic below:

[Finding and Sorting Data](#)

Attachments Dialog

List box: A list of all files attached to the current contact

View Button: Click to view the selected attached file

Attach Button: Click to attach a new file to the current contact

Properties Button: Click to modify the settings of the selected attached file

Detach Button: Click to detach the selected attached file from the current contact

OK: Click when you are finished working with attached files

Cancel: Click to abort the Attachments dialog

For more specific information, select the topic below:

[Attaching Files to an IC2 Contact](#)

Sort Contacts Dialog

By: A list of fields that are available to be sorted by

Order: Select the order (Ascending or Descending) from the option buttons

OK: Click to begin sorting

Cancel: Click to cancel the sort

For more specific information, select the topic below:

[Finding and Sorting Data](#)

Event Properties Dialog

What: Enter a brief description for the event

Duration: Enter a duration for the event in the format HH:MM

When: Enter a date and time for the event in the proper date/time format

With Whom: Enter a name if applicable

Notes: Enter any notes which apply specifically to this event

Browse Button: Click to view a list of options for certain fields

Done: Check this box when the event has been completed

Alarm: From the option buttons choose On, Off or Early Ring

OK: Click to confirm the event

Cancel: Click to abort the event

For more specific information, select the topic below:

[Time Manager](#)

ToDo Properties Dialog

What: Enter a brief description for the ToDo item

Priority: Enter a number from 1 to 9 to set a priority for the ToDo item

With Whom: Enter a name if applicable

When: Enter a date for the ToDo, can be left blank to create a floating ToDo

Notes: Enter any notes which apply specifically to this ToDo item

A.S.A.P. Button: Click to enter today's date in the When field

Browse Button: Click to view a list of options for certain fields

Done: Click when the ToDo has been completed

OK: Click to accept the ToDo entry

Cancel: Click to abort the ToDo entry

For more specific information, select the topic below:

[Time Manager](#)

Field Layout Dialog

Fields: A list of all fields on the Contact Detail tab screens

Move Up Button: Click to move the selected field up one position

Move Down Button: Click to move the selected field down one position

Hide Button: Click to hide the selected field

OK: Confirm the changes to the field layout

Cancel: Abort the changes to the field layout

For more specific information, select the topic below:

[Customizing IC2](#)

Special Field Lists Dialog

Tabs: Click the appropriate tab to select the list you want to edit

Add Button: Click to add a new item to the current list

Edit Button: Click to edit the selected item on the current list

Discard Button: Click to delete the selected item from the current list

OK: Click to confirm your changes

Cancel: Click to abort your changes

For more specific information, select the topic below:

[Customizing IC2](#)

Place Call Dialog

Number: Enter a phone number or select one from the list

Long Distance: Click this check box if the number is long distance

Options Button: Click to edit your Autodial options

OK: Click to begin call

Cancel: Click to abort call

For more specific information, select the topic below:

[Using the Autodialer](#)

Print Dialog

Output: Select Letters, Labels or Reports from the option buttons

Contacts: Select Current or Filtered List from the option buttons

Layout Button: Click to select a format file for the output you selected

Printer Button: Click to call the standard Windows Print Setup dialog

OK: Click to begin printing

Cancel: Click to abort the print job

For more specific information, select the topic below:

[Printing](#)

Exchange Data Dialog

Action: Select Copy(Export) or Merge(Import) from the option buttons

OK: Click to continue

Cancel: Click to abort

For more specific information, select the topic below:

[Exchanging Data with Other Applications](#)

File Summary Dialog

Filename: Name of current file

File Date: Date this file was last accessed or saved

File Time: Time this file was last accessed or saved

File Size: Current size of this file

Contacts: Number of contacts in this file

ToDo's: Number of ToDo items in this file

Events: Number of events in this file

History rec's: Number of history items in this file

Date & Time Dialog

Date/Time: Enter a date and time into this text box

H:M: Use these spin buttons to select a time (in 15 minute increments)

Calendar Display: Click on the desired date

Today Button: Click to enter today's date into the Date/Time text box

OK: Click to accept selected date

Cancel: Click to abort Date & Time dialog

For more specific information, select the topic below:

[Using the Date & Time Dialog](#)

Contact Dialog

List: Select the desired contact from the list of contacts in the current file

OK: Click to accept the selection

Cancel: Click to abort the dialog

Contact List Layout Dialog

Available Fields: Select the fields to show in the Contact List window

Visible Fields: List of fields selected to show in the Contact List window

Show Field Button: Click to add the selected Available Field to the Visible Fields list

Hide Field Button: Click to move the selected Visible Field to the Available Fields list

Move Up Button: Click to move the selected Visible Field up one position in the list

Move Down Button: Click to move the selected Visible Field down one position in the list

OK: Click to accept the changes you've made

Cancel: Click to abort the changes you've made

For more specific information, select the topic below:

[Customizing IC2](#)

Map Fields for File Export Dialog

Available Fields: Select a field from the list of fields available for export

Field Output Order: List of fields currently selected for export

File Type: Select the type of export file (ASCII-Comma Delimited, ASCII-Tab Delimited or xBase compatible)

Show Field Button: Click to move the selected Available Field to the Field Output Order list

Hide Field Button: Click to remove the selected field from the Field Output Order list

Move Up Button: Click to move the selected field up one position in the Field Output Order list

Move Down Button: Click to move the selected field down one position in the Field Output Order list

OK: Click to begin the export

Cancel: Click to abort the export

For more specific information, select the topic below:

[Exchanging Data with Other Applications](#)

Exchange What Dialog

Data: Select the check box for all items that you want to export (Contacts, Events, ToDo's, History, and Attachments)

OK: Click to begin exchanging data

Cancel: Click to abort the data exchange

For more specific information, select the topic below:

[Exchanging Data with Other Applications](#)

Map Fields for File Import Dialog

Input Field Data: A list of fields found in the first record of the import file. Select a field to map from the list

Matching Field: Select an IC2 field to import the data from the selected import field into

File Type: IC2 will display the type of import file you have selected.

OK: Click to begin the import

Cancel: Click to cancel the import

For more specific information, select the topic below:

[Exchanging Data with Other Applications](#)

End Call Dialog

Results: Select the appropriate result from the option buttons

Notes: Enter any notes which apply specifically to this call

Create a "call-back" ToDo: Check this box to create a call back ToDo item

Add call to the History: Check this box to log the call in the History window

Forget Call Button: Click this button to abort the call

Stop Timer: Click this button to stop the timer and notate results for the call

OK: Click to accept the call entry

Cancel: Click to escape the End Call dialog and resume timing

Alarm Notice Dialog

Text Summary: A summary of the event entry that triggered the alarm

Event Button: Click to view or edit the event entry

OK: Click to continue

For more specific information, select the topic below:

[Time Manager](#)

Contact Tabs Dialog

Input Boxes: Enter the new name for each tab, using the old names as reference

OK: Click to accept new tab names

Cancel: Click to abort tab name changes

For more specific information, select the topic below:

[Customizing IC2](#)

Tool Menu Properties Dialog

List Box: A list of existing menu items

New: Click to add a new item to the Tools menu

Properties: Click to edit the selected menu item

Delete: Click to remove the selected menu item

Move Up Button: Click to move the selected item up one position in the list

Move Down Button: Click to move the selected item down one position in the list

OK: Click to accept your changes to the Tools menu

Cancel: Click to abort your changes to the Tools menu

Tool Properties Dialog

Menu Caption: Enter a brief caption to use as the name for the menu item

Command Line: Enter the path and filename of the program to execute

Run State: Select an option button (Normal, Minimized or Maximized)

Browse: Click to use the file selector to select the filename of the program to execute

OK: Click to accept the menu item

Cancel: Click to abort the Tool Properties dialog

History Properties Dialog

What: Enter a brief description for the history entry

Duration: Enter a duration in the format HH:MM

When: Enter a date and time for the history entry in the proper format

With Whom: Enter a name if applicable

Notes: Enter any notes which apply specifically to this history entry

Browse Button: Click to view a list of options for certain fields

OK: Click to accept the history entry

Cancel: Click to abort the history entry

For more specific information, select the topic below:

[The History Window](#)

IC2 (Main) Window

The main window of IC2 allows you to open multiple MDI windows to view all of your contact and time information. It also has a toolbar for quick access to many common tasks.

Available Menus

File menu

Tools menu

Help menu

Contact Detail Window

The contact detail window is a display of the six tab screens which contain all of the available entry fields for contact information. It has a control bar for moving between records. It can be resized as desired.

Available Menus

[File menu](#)

[Edit menu](#)

[View menu](#)

[Insert menu](#)

[Format menu](#)

[Tools menu](#)

[Window menu](#)

[Help menu](#)

Related Topics

[Entering and Editing Contact Information](#)

[Customizing IC2](#)

Time Manager Window

The Time Manager window contains the split list of Events and ToDo's. It has a control bar which allows you to set the date to view. You can also change the font for the Time Manager window.

Available Menus

[File menu](#)

[Edit menu](#)

[View menu](#)

[Insert menu](#)

[Format menu](#)

[Tools menu](#)

[Window menu](#)

[Help menu](#)

Related Topics

[Time Manager](#)

[Customizing IC2](#)

Contact List Window

The Contact List window shows a list of all contact records in the current database. It allows you to set the font and change the column and row sizes. You can also select which fields you want to view in the contact list.

Available Menus

[File menu](#)

[Edit menu](#)

[View menu](#)

[Insert menu](#)

[Format menu](#)

[Tools menu](#)

[Window menu](#)

[Help menu](#)

Related Topics

[The Contact List](#)

[Customizing IC2](#)

History Window

The History window is a list of all events, ToDo's calls, data exchanges, reports printed, form letters printed, and labels printed that have occurred with the current file. You can add your own items to the History list as well. Plus you can change the font and row/column sizes to suit your needs.

Available Menus

[File menu](#)

[Edit menu](#)

[View menu](#)

[Insert menu](#)

[Format menu](#)

[Tools menu](#)

[Window menu](#)

[Help menu](#)

Related Topics

[The History Window](#)

[Customizing IC2](#)

Alarm Window

The Alarm window allows you to view any alarms that are set up in the current file. You can view pending and skipped alarms.

Available Menus

[File menu](#)

[Edit menu](#)

[View menu](#)

[Insert menu](#)

[Format menu](#)

[Tools menu](#)

[Window menu](#)

[Help menu](#)

Related Topics

[Time Manager](#)

[Customizing IC2](#)

File Menu

New: Select to create a new IC2 data file

Open: Select to open an existing IC2 data file

Exit: Select to exit the IC2 program

File Name Items: Select to open one of the last four IC2 data files used

Tools Menu

Menu Properties: Select to view or edit the tool menu properties

Place Call: Select to place a call

Options: Select to view or edit your IC2 options.

Help Menu

Specific: Select to view context sensitive help

General: Select to see the Table of Contents

Order Information: Select to see information on ordering IC2

Print an Order Form: Select to view an order form which can be printed out.

License Information: Select to see license information about IC2

User Support: Select to see support information for IC2

About: Select to see the intro screen for IC2

File Menu

New: Select to create a new IC2 data file

Open: Select to open an existing IC2 data file

Close: Select to close the current IC2 data file

Save: Select to save the current IC2 data file

Save As: Select to save the current IC2 data file under a different filename

Print: Select to print a report, labels or form letters

Print Setup: Select to change your printer settings

Exchange Data: Select to begin an import, merge or export operation

Summary Info: Select to see information about the current file

Exit: Select to exit the IC2 program

File Name Items: Select to open one of the last four IC2 data files used

Edit Menu

Undo: Select to Undo the last change made to the current item

Cut: Select to place the selected text into the Clipboard

Copy: Select to place a copy of the selected text into the Clipboard

Copy Special: Select to copy a group of fields to the Clipboard

Paste: Select to paste the contents of the Clipboard at the current cursor position

Delete: Select to delete the selected item

Find: Select to initiate a text search (within one field only)

Contact: Select to edit the current contact

Delete Item: Select to delete the current contact

View Menu

Next: Select to view the record after the current record

Previous: Select to view the record before the current record

Attachments: Select to view a list of the files attached to the current record

Apply Filter: Select to apply a filter to the current list of contacts.

Use All Data: Select to remove any filter currently in place

Sort Contacts: Select to sort contacts by a field

Contact List: Select to switch to the Contact List window

Events: Select to switch to the Time Manager window

ToDo List: Select to switch to the Time Manager window

History: Select to switch to the History window

Alarms: Select to switch to the Alarms window

Insert Menu

Contact: Select to create a new contact record

Event: Select to create a new event record (fills in current contact name)

ToDo: Select to create a new ToDo item (fills in current contact name)

History Entry: Select to create a new history entry (fills in current contact name)

Attachment: Select to attach a new file to the current contact

Format Menu

All Caps: Select to change the current field to all capital letters

Mixed Case: Select to change the current field to mixed upper/lower case letters

Lower Case: Select to change the current field to all lower case letters

Field Layout: Select to change the field layout for the Contact Detail window

Contact Tabs: Select to view or edit the tab names on the Contact Detail window

Special Field Lists: Select to view or edit the special field lists

Tools Menu

Menu Properties: Select to view or edit the tool menu properties

Place Call: Select to place a call

More Tools: Select to see additional tool menu items

Options: Select to view or edit your IC2 options.

Window Menu

Arrange All: Select to arrange all opened MDI windows in a stacked fashion

Tile All: Select to arrange all opened MDI windows in a tiled fashion

Icon All: Select to iconize all opened MDI windows

Arrange Icons: Select to arrange all icons at the bottom of the main window

Switch to: Select to switch to another MDI window

Help Menu

Specific: Select to view context sensitive help

General: Select to see the Table of Contents

Order Information: Select to see information on ordering IC2

Print an Order Form: Select to view an order form which can be printed out.

License Information: Select to see license information about IC2

User Support: Select to see support information for IC2

About: Select to see the intro screen for IC2

Edit Menu

Undo: Select to Undo the last change made to the current item

Cut: Select to place the selected text into the Clipboard

Copy: Select to place a copy of the selected text into the Clipboard

Paste: Select to paste the contents of the Clipboard at the current cursor position

Delete: Select to delete the selected item

Select All: Select to highlight all items in the current list

Mark As Done: Select to mark the selected item "Done"

Find: Select to initiate a text search (within one field only)

ToDo: Select to edit the selected ToDo item

Event: Select to edit the selected event

View Menu

ToDo List: Select to switch to the Time Manager window

Event List: Select to switch to the Time Manager window

Today: Select to change the view in the Time Manager window to today's items

Date Browse: Select to browse for a date to view in the Time Manager window

Contact: Select to switch to the Contact Detail window

Contact List: Select to switch to the Contact List window

History: Select to switch to the History window

Alarms: Select to switch to the Alarms window

Insert Menu

ToDo: Select to create a new ToDo item (fills in current contact name)

Event: Select to create a new event record (fills in current contact name)

Contact: Select to create a new contact record

History: Select to create a new history entry (fills in current contact name)

Format Menu

Font: Select to change the font for the current window

Edit Menu

Undo: Select to Undo the last change made to the current item

Cut: Select to place the selected text into the Clipboard

Copy: Select to place a copy of the selected text into the Clipboard

Copy Special: Select to copy a group of fields to the Clipboard

Paste: Select to paste the contents of the Clipboard at the current cursor position

Delete: Select to delete the selected item

Select All: Select to highlight all items in the current list

Find: Select to initiate a text search (within one field only)

View Menu

Apply Filter: Select to apply a filter to the current list of contacts.

Use All Data: Select to remove any filter currently in place

Sort Options: Select to sort contacts by a field

Contact Detail: Select to switch to the Contact Detail window

Attachments: Select to view a list of the files attached to the current record

Events: Select to switch to the Time Manager window

ToDo List: Select to switch to the Time Manager window

History: Select to switch to the History window

Alarms: Select to switch to the Alarms window

Format Menu

Font: Select to change the font for the Contact List window

List Layout: Select to change the layout for the Contact List

Edit Menu

Undo: Select to Undo the last change made to the current item

Cut: Select to place the selected text into the Clipboard

Copy: Select to place a copy of the selected text into the Clipboard

Paste: Select to paste the contents of the Clipboard at the current cursor position

Delete: Select to delete the selected item

Select All: Select to highlight all items in the current list

Mark As Done: Select to mark the selected item "Done"

Find: Select to initiate a text search (within one field only)

History: Select to edit the current history entry

View Menu

Today: Select to change the view in the History window to today's (and all prior) items

Browse: Select to browse for a date to view in the History window

Contact: Select to switch to the Contact Detail window

Contact List: Select to switch to the Contact List window

ToDo List: Select to switch to the Time Manager window

Event List: Select to switch to the Time Manager window

Alarms: Select to switch to the Alarms window

Insert Menu

History: Select to create a new history entry

ToDo: Select to create a new ToDo item (fills in current contact name)

Event: Select to create a new event record (fills in current contact name)

Contact: Select to create a new contact record

Edit Menu

Event: Select to edit the highlighted event

View Menu

Skipped: Select to view only events that were skipped

Pending: Select to view only events that are pending

Contact Detail: Select to switch to the Contact Detail window

Contact List: Select to switch to the Contact List window

History: Select to switch to the History window

Insert Menu

Contact: Select to create a new contact record

Event: Select to create a new event record (fills in current contact name)

ToDo: Select to create a new ToDo item (fills in current contact name)

History Entry: Select to create a new history entry (fills in current contact name)

User Support

If you encounter a problem while using IC2 that is not covered in the Help file, you will probably need to contact us for user support. Our support policies are as follows:

If you are having trouble using IC2, first make sure IC2 is causing the problem:

- Check your Windows configuration
- Check your printer and print configuration
- Try closing any other applications that may also be running and try IC2 again
- Reboot your computer and see if the problem still occurs

If none of these produce results, try using the Help file to locate information about the task you are trying to perform.

Troubleshooting

This program **requires** a basic knowledge of Windows. If you are not familiar with Windows, please do not call us unless you're certain the problem you're having is related to IC2. It inconveniences our other users if we have to provide you with tech support for Windows.

If all else fails, you may receive technical support with one of the following methods:

Phone: 817/656-5970 (Operating hours are 9-5 CST, Monday through Friday)

Fax: 817/656-7794

Email: CompuServe# 70404,3014 - AOL: CVPSupport - Internet: cvpsupport@aol.com

When contacting us we need the following information:

- The make and model of your computer
- The type of display
- The version number of Windows you are running
- The amount of memory your computer has
- A detailed account of what you did when using IC2 and what happened from your view.

NOTICE: We reserve the right to decline technical support to any unregistered user in order to better serve our registered customers.

Properties Dialog

Field Contents: Enter the desired text if you are creating a label. If you want to insert a field, select it from the list box.

Sample: A display of the current font style

Alignment: Select the alignment for the field from the option buttons.

Font Button: Click to select a new font for the label or field

OK: Click to insert the field in the report

Cancel: Click to abort the operation

For related information, select the topic below:

[Designing a Report Format](#)

Report Layout Dialog

Margins

Top: Enter the measurement for the top margin in inches

Bottom: Enter the measurement for the bottom margin in inches

Left: Enter the measurement for the left margin in inches

Right: Enter the measurement for the right margin in inches

Dimensions

Header Height: Enter the measurement for the header in inches

Body Height: Enter the measurement for the body in inches

Footer Height: Enter the measurement for the footer in inches

Page Width: Enter the measurement for the page width in inches

OK: Click to accept the measurements

Cancel: Click to abort the measurements

For related information, select the topic below:

[Designing a Report Format](#)

Insert Field

List box: Select a field to insert

OK: Click to insert the selected field

Cancel: Click to abort the operation

Page Layout Dialog

Page Margins

Top: Enter the measurement for the top margin in inches

Bottom: Enter the measurement for the bottom margin in inches

Left: Enter the measurement for the left margin in inches

Right: Enter the measurement for the right margin in inches

Label Size

Height: Enter the measurement for the label height in inches

Width: Enter the measurement for the label height in inches

OK: Click to accept the measurements

Cancel: Click to abort the measurements

For related information, select the topic below:

[Designing a Label Format](#)

Page Layout Dialog

Margins

Top: Enter the measurement for the top margin in inches

Bottom: Enter the measurement for the bottom margin in inches

Left: Enter the measurement for the left margin in inches

Right: Enter the measurement for the right margin in inches

OK: Click to accept the measurements

Cancel: Click to abort the measurements

For related information, select the topic below:

[Designing a Form Letter](#)

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Thank you for your cooperation!

Troubleshooting

Here are some of the problems commonly encountered when installing or using IC2.

SHARE.EXE error/Unable to open a file/Unable to add a record

You must have this line in your AUTOEXEC.BAT file: **C:\DOS\SHARE.EXE /L:500**. Where 'C:' equals your drive and '\DOS' equals your DOS directory. Also be sure there is a space between SHARE.EXE and /L:500. This line needs to precede any executable you may be running from the AUTOEXEC.BAT file, including Windows! Put it after your PATH or SET PATH statement.

If you have any problems loading a file or adding a record to a new database, check your AUTOEXEC file to make sure SHARE.EXE has been installed and that the number of locks (the /L parameter) is 500 or more. You should also check your CONFIG.SYS and make sure you have a minimum value of **40** for both the BUFFERS and FILES.

You will need to reboot your computer after making any of these changes.

Problems with Convert Utility

Make sure you are not having the above problem. To check, try opening the SAMPLE file you received with IC2. If you cannot open the Sample file, see previous solution. Sometimes the convert doesn't work the first time so try to convert the file a second and third time before giving up. Also, make sure you do the following each time you run the convert:

DO NOT run IC2 when you are running the convert program.

Use the browse button in the convert utility to select the IC1 filename instead of typing it in.

Problems Adding a Record

Use the Contact command on the Insert menu to add a record instead of using the toolbar button for inserting a contact. When you are ready to save the record, press ENTER. When you are adding records to a new database, you must use the Insert, Contact command to add the first record as well.

Couldn't insert or paste; data too long for field.

One of your fields has too much text in it. The record cannot be saved until this is corrected.

File already exists (such as THREED.VBX, etc.)

You already have an older version of the file on your system. Rename the other file, then run the installation program again and the files will be copied properly. This shouldn't cause conflicts with other Visual Basic programs.

No Current Record error

You have a filter applied for which no records were found. You need to try another filter or go back to displaying all data.

Empty Contact List window

The list may not have refreshed after the last action. Try closing (not minimizing) the Contact List and opening it again. This should refresh the list. Or you have a filter applied for which no records were found. You need to try another filter or go back to displaying all data.

Fields Overwrite on the Contact Detail window

Occasionally the fields on the Contact Detail window will overwrite. This usually occurs after you

change the field layout. To correct this, close the Contact Detail window and re-open it to refresh the display.

When more than one tab screen is active, you can select the Contact (the first one) tab screen and then go back to the one you want. This should refresh the display.

Accelerator Keys

IC2 has built in accelerator keys which allow you to quickly access the commonly used functions of the program when using the keyboard. Here are the accelerator keys that are available in IC2:

Ctrl+O	Open a file
Ctrl+S	Save the current file
Ctrl+X	Place the highlighted text in the Clipboard
Ctrl+C	Place a copy of the highlighted text in the Clipboard
Ctrl+V	Place the text from the Clipboard at the current cursor position
Ctrl+F	Call the Find dialog
Ctrl+D	Delete the current record or item
Ctrl+N	Go to the next record
Ctrl+P	Go to the previous record
Ctrl+A	Create a new contact record
Ctrl+E	Create a new event record
Ctrl+T	Create a new ToDo item
Ctrl+H	Create a new history item
F1	Context sensitive help
F4	Activate the Contact Detail window
F5	Activate the Contact List window
F6	Activate the Event window
F7	Activate the ToDo window
F8	Activate the History window
F9	Activate the Alarm window
F12	Place a call

International Distributors

Below is a listing of the distributors authorized to sell registered copies of IC2. In addition to allowing you to make payment in your local currency, these distributors also handle product support, thereby saving you money. To place an order with your local distributor, please contact them directly:

Australia

Linda Putland
Albyn Business Computing
P.O. Box 324
Strathalbyn SA 5255
\$59 Aus/copy, subject to change

Phone: 61 85 363 594
Fax: 61 85 363 594
Mobil: 018 830 927

If there is no local distributor listed for your country, you may fax us your credit card order, or you can use CompuServe's Registration Database, Item #404. Both methods will involve a charge of \$64 US, \$49 for the package plus \$15 S&H. You can also mail your order with credit card information or a money order in US funds.
