/ Full Contact: How To

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Create a new order

To create a new contact you must:
1) From the main menu select: Open / Order.
2) Open the document window:

Clicking on the left icon of the variable tool bar **or**
Select the Document / New option from the menu.

A window appears.
3) Insert the data.

Note that you must insert first the various addresses the (using a mouse or with a tab) start
to insert the order items.
The little square at the left of the order item is used to delete an item; left it un-checked.
At the right of the little square a field: insert the product name. If you are not sure of the product name you may insert only his starting letters (p.e. P for Pen Black color); if more than one product matches the inserted pattern a list of matching products appears.
You select one and automatically the price field and the comment field are inserted.
The comment field contains the product long name, if the comment field does not shows all the content of the product long name, and you want to drill down, position the mouse over the description field and press the left button mouse; insert the quantity and then TAB.
The item is filled; the total is updated.
To insert the Taxes (is a percentage) press ALT-T.
Note that only 3 items are showed, if you want to insert more continue pressing TAB new items will appear.

If you want to save the document use the OK button.
If you want to quit use the cancel button.
If you want to Print the order use the Print button.

Enter a new record

To enter a new record you must open the record type from the main menu.
Then you select Record - Add.
A form in which you may enter the values appears.
Note that some 'hot-keys' are defined.
In particular:

If you are on an edit field:

F8 inserts the current date in short format
F9 inserts the current date in long format

If you are over a radio button:

Left mouse button click highlight the button.
Left mouse button double-click, return, space check/un-check the button.

If you are on a multi-line edit control (a big edit control with a scroll bar at the right)

ALT-M enlarge / reduce the dimension of the control.

Order Controls

To change a controls Tab order you must select the set / control number topic of a form menu; in the resulting dialog you must insert the new order.

Create a New Contact

To create a new contact you must:

1) From the main menu select: Open / Contact.

2) Open the document window:

Clicking on the left icon of the variable tool bar **or**
Select the Document / New option from the menu.

A window appears.

3) Insert the data.

If you want to save the document use the OK button.
If you want to quit use the cancel button.

Delete a Contact

To delete a contact you must:
1) From the main menu select: Open / Contact.
2) Find and Select the contact you want to delete then:
    Drag it to the Wastebasket tool bar icon **or**
    Press the DEL button **or**
    Select the Document / Delete option from the menu.

NOTE: you may select (and delete) many documents at the same time.

Un-Delete a Contact

To un-delete a deleted contact you must:

1) From the main menu select: Open / Contact.
2) From the main menu select: Open / Deleted.
   The deleted document list appears in the main window.
2) Find and Select the contact you want to un-delete then:
   Press the INS button **or**
   Select the Documents / Undelete option from the menu

Find a contact

To find a contact you must:
1) From the main menu select: Open / Contact.
Then you may either:

A) Browse the main list using the arrows or the previous / next icons or the previous / next menu options. Note that if you press a letter the first contact starting with the letter is selected.
B) Call the selection module .

using the Document / Select option **or**
clicking on the Select Icon.

Create a Note

To create a new Note you must:

1) From the main menu select: Open / Note.

2) Open the document window:

Clicking on the left icon of the variable tool bar **or**

Select the Documents / New option from the menu **or**

A window appears.

3) Insert the data.

If you want to save the document use the OK button.

If you want to quit use the cancel button.

Create a Note for a contact

To create a new Note for a contact you must

1) From the main menu select: Open / Contact.
2) Select in the main list the contact for which you want to create the Note then:

Click over the icon on the right that represent a Note  **or**
Select the Document / Document Add / Note menu option.

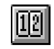
A window appears.

3) Insert the data.

If you want to save the document use the OK button.
If you want to quit use the cancel button.

Create an appointment for a contact

To create a new appointment for a contact you must
1) From the main menu select: Open / Contact.
2) Select in the main list the contact to which the note pertains then:

Click over the icon on the right that represent an Appointment  **or**
Select the Document / Document Add / Appointment menu option **or**
Drag the contact in the hourly calendar of the day you want the appointment scheduled for **or**
Click over the New Appnt button on the contact edit form.

N.B. You may drag the contact to any hourly calendar. i.e. the ones in the weekly calendar, the one in the monthly calendar, the one in the daily calendar.

A window appears.
3) Insert the data.

If you want to save the document use the OK button.
If you want to quit use the cancel button.

Insert a note(appt) in many contact

To Insert a note(appt) in many contact you must:

1) Select the note then:
A) Open it in an edit window.
B) Open the contacts list
C) Find the contact you want to insert the note in
D) Drag it to the contacts in the main list you want to contain the note(appt).
or
A) Select it in the child list then:
B) Drag it to the contacts in the main list you want to contain the note(appt).

Create an Appointment

You may create an appointment:

A) For a contact

B) Stand Alone from the menu

1) From the main menu select: Open / Appointment.
2) Open the document window

Clicking on the left icon of the variable tool bar **or**
Select the Document / New option from the menu **or**
Clicking on one of the icon on the right of the variable tool bar. In this case the document will be part of the group of the currently selected item.

A window appears.
3) Insert the data.

If you want to save the document use the OK button.
If you want to quit use the cancel button.

C) From the calendar

1) Position the mouse over the hourly calendar of the daily, weekly or monthly windows.
2) Holding the left mouse button down Drag the mouse to the appointment end.

A window appears.
3) Insert the data.

If you want to save the document use the OK button.
If you want to quit use the cancel button.

Delete an Appointment

To delete an appointment you may:

Method A:

1) From the main menu select: Open / Appointments.
2) Find and Select the appointment you want to delete then:
   Drag it to the Wastebasket tool bar icon **or**
   Press the DEL button **or**
   Select the Document / Delete option from the menu

NOTE: you may select (and delete) many appointments at the same time.

Method B:

Select the appointment in the child list or in a to do list and then:
Drag it to the Wastebasket tool bar icon **or**
Press the DEL button.

Method C:

Select the appointment in the hourly calendar of the daily, weekly or monthly windows.
(the appointment is in a darker shade of gray) then:
Drag it to the Wastebasket tool bar icon **or**
Press the DEL button

Modify an Appointment

You may modify an appointment:

Method A:
Open it and, manually, change its data.

Method B: to change the starting **or** the ending time.
Select the appointment in the hourly calendar of the daily, weekly or monthly windows. (the appointment will be colored of a darker shade of gray) then:

> Position the mouse over the upper or lower appointment border (the mouse will became a cross) then drag the border to a new position **or**
> Select the appointment and press at the same time the CTRL (increase) or the ALT (reduce) key and the UP or DOWN arrow.

Method C: change the starting **and** the ending time.
Select the appointment in the hourly calendar of the daily, weekly or monthly windows. (the appointment will be colored of a darker shade of gray) then:

> Position the mouse over the appointment (the mouse will became an hand) then drag the appointment to a new position **or**
> Press the UP or the DOWN arrow.

Create a To Do

Create an appointment in the customary way and check the To Do radio button.

Calculate a Report

1) Select the Data File you want to calculate the report for.
2) Select (using the selection module) the records you want to report on then:
   Select in the tool bar report combo box the report you want to calculate
   Click on the report icon **or**

   Use the Document / Report / .... (the report you want) main menu option.

Change Priority color codes

Appointment priorities color codes are predefined as:
Priority 1: Red
Priority 2: Yellow
Priority 3: Green

You may change them using the Calendar / Priority menu option.
The standard change color window will appear, select the new color.

Print an agenda report

There are basically three types of agenda reports:
1) Daily Report
2) Weekly Report
3) Monthly Report

You may print the daily report either from the main menu (Calendar / Reports / Daily Report option) than selecting an appointment in the hourly calendar and pressing the Print Screen key.

Export the data

1) Select the Data File you want to export the data for.
2) Select (using the selection module) the records you want to export.
3) Select the Utility / Export option
4) Select the delimiter
5) Give a data name

Import the data

To import data from a delimited file you must:

1) Select the Utility / Import option
2) Select the data file you want to import from.
4) Select in the combo Box witch kind of data file you want to fill.

Backup

Two types of Backup are available: Total and Incremental
We suggest you to: do a total backup every 1-2 weeks ; do an Incremental backup Daily.
Keep safely stored at least two backups.

To backup your data:
1) Select the Utilities / Backup / Total or Incremental
2) Give the Backup file name
3) Change diskette when required.

Please be sure to have an adequate number of formatted floppy disks available.
NOTE: the backup utilities compress the information; normally 1-2 diskettes are enough.

Restore

If you lose your data you must restore them from the Backup file.

To restore your data:

TOTAL RESTORE
1) Select Utilities / Restore / Total
2) Select the last Total Backup file.
3) Change diskette when required.

When the Total Restore is completed start the Incremental restores.

1) Select Utilities / Restore / Incremental
2) Select the **first** Incremental Backup file.
3) Change diskette when required.

Repeat pass 1,2,3 for each incremental backup file. Be sure to respect production order.

Print labels

1) Select (using the selection module) the contacts you want to build the labels for.
2) Select Utilities / Mass Mailing
3) Select in the dialogue : Contacts in the main list and press Ok
   The *To Send* window will appear
4) Select Ok in the *to send* window **or** add to it new contacts dropping them from the main list **or** delete unwanted contacts.
5) Select Labels in the dialogue and select how many labels you want in a page.
6) Select OK.

Create a personalized Letter

Only Note and external documents of the Windows Write type may be personalized letters.

To create a personalized letter:

A) Open the Write external Document or the Note
B) Open the Fields Select window from the main menu using the Utilities / Field Select option.
    A window containing a list of fields appears on the left of the screen
C) Write your letter; when a word must be replaced by a Full Contact item:
    1) Double Click, in the Field Select window, on the data item.
    2) Click again on your Write or Notes window.
  A string with format @dataFileName->dataFieldName@ is inserted in your document.
  p.e. @contact->Last Name@

Repeat steps A and B till you finish.

Print a personalized Letter

To print a personalized letter you must:

1) Open the note or the external Write document you want to print.
2) Select (using the selection module) the contacts you want to mail merge in your letter.
3) Select Utilities / Mass Mailing
4) Select in the dialogue : *Contacts in the main list* and press Ok or if the Note (external Write document) has been inserted in many contacts the *Contacts in which the note ....*
   The *To Send* window will appear
5) Select Ok in the *To send* window **or** add to it new contacts dropping them from the main list **or** delete unwanted contacts.
6) Select Print in the dialogue.
7) Select OK.

Fax a personalized Letter

To Fax a personalized letter you must:

1) Open the note or the external Write document you want to Fax.
2) Select (using the selection module) the contacts you want to mail merge in your letter.
3) Select Utilities / Mass Mailing
4) Select in the dialogue : *Contacts in the main list* and press Ok or if the Note (external Write document) has been inserted in many contacts the *Contacts in which the note ....*
   The *To Send* window will appear
5) Select Ok in the *To send* window **or** add to it new contacts dropping them from the main list **or** delete unwanted contacts.
6) Select Fax in the dialogue.
7) Insert the number of Pages your document will have.
8) Select OK.
9) A window will appear, here you may change the contacts Fax # or, optionally, decide if you want to print the letter.
10) Select OK.

NB. To Fax you need Delrina WinFax.

Dial a contact #

To Dial a contact number you must:

1) From the main menu select: Open / Contact.
2) Find and Select the contact you want to phone to then:
   Drag it to the Telephone tool bar icon **or**
   Select the Document / Telephone option from the menu
The Dial window appears; it contains the telephone numbers you may dial to.
3) Select one and press the OK button.
   The number is dialed.
4) a note window appear; You may insert comment on the telephone call and save the note or quit.

Pull Data with DDE

Full Contact allows to Pull data from an external application.
On how to pull data refer to the external application documentation.
Full Contact provides the following services:
Application Name : FullContact

Item Name: Selected:

Topic Name one of the fields of the currently selected record
The selected command sends to the client application the Topic field content.
To obtain the list of the available fields use the ListSelected command.

Item Name: Next
Topic Name: none.
The Next command move the selected record to the next item in the main list

Item Name: Previous
Topic Name: none.
The Previous command move the selected record to the previous item in the main list

Item Name: ListSelected
Topic Name: none.
The ListSelected command list the data fields contained in the current item in the main list

Clean Up deleted data

To speed up the Db you may decide to Clean Up from the data base the deleted Item.
Warning: deleted item will not be recoverable.

To do that select from the main menu Utility / Compress option.

Clean Up obsolete agenda itm

To speed up the Db you may decide to Clean Up old agenda items.

Warning: the deleted items will not be recoverable.

To do that
1) Select from the main menu the Utility / Clean Up Agenda option.
   A window asking you how many agenda items you want to delete appear
2) Select the appropriate option
3) Select O.K.

Insert the Date

Any edit field accept the **F8** and **F9** Hot keys. Pressing them you insert the current date in the field.

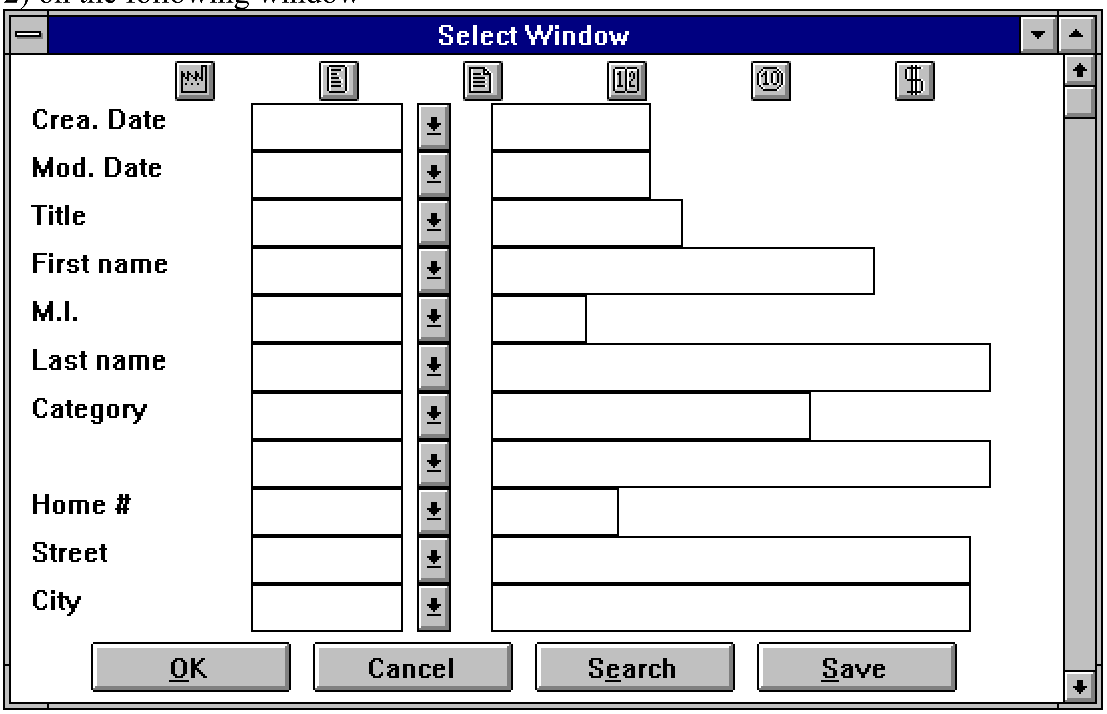
The selection module

Using the selection module you may reduce the number of contacts showed in the main list.

To do that:
1) Call the selection module using the Document / Selection menu item **or**

click on the  selection icon.

2) on the following window



insert your selection criteria;
You may select the logical operators from the Combo Boxes.
If you need to insert a selection criteria that spawns many data file (p.e. the contacts to which I telephoned the 12-3-1994) click on the appropriate icon to insert the selection criteria for the new file.
Selection criteria may be saved and retrieved.

Create an external Document

1) From the main menu select: Open / Ext Document.
2) Open the Ext. Document window

Clicking on the left icon of the variable tool bar **or**
Select the Document / New option from the menu **or**

A window appears
3) Insert the title.
4) Insert the file name; it MUST be a valid DOS file Name. Keep care to insert the correct standard extension (p.e. .wri for write documents, .123 for Lotus 1-2-3 spreadsheets, .SAM for Ami Pro documents ecc..). If the extension is correct to the left of the file name field the document type appear.
5) If you want to save the document use the OK button.
If you want to quit use the cancel button.

The system will try to open an empty document of the selected type with the given name. THIS MAY NOT BE POSSIBLE, depending from the external tool called. In this case remember to save the document with the name given in the filename field.
6) The external tool start.

Modify an external document

You may either:
1) Open the record pointing to it from Full Contact and select OK **or**
2) Modify it from the program manager.

Import an external Document

An external document may be imported from the File Manager. To do that you must:
1) Open the file manager
2) Select the external document you want to import and Drag it to Full Contact main or child List.
An external document window appears; insert the file Title.
3) Answer OK.

Create an External Document For a Contact

To create a new Ext Document for a contact you may either:
Method A:

1) From the main menu select: Open / Contact.
2) Select in the main list the contact to which the Ext. Document pertains then:

Click over the icon on the right that represent an Ext. Document  **or**
Select the Document / Document Add / Ext. Document menu option.

A window appears
Insert the data.
If you want to save the document use the OK button.
If you want to quit use the cancel button.

Method B:
An external document may be imported from the File Manager. To do that you must:
1) Open the file manager
2) From the main menu select: Open / Contact.
3) Select in the main list the contact to which the Ext. Document pertains then:
4) Select in the File Manager the document you want to import and Drag it to Full Agenda child List.
An external document window appears; insert the file Title.
3) Answer OK.

Modify the Pers. Info

1) Select the Customize / Personal Info menu option
2) Insert the new data
3) Answer OK

Remove a Document from a group

To remove a document from a group you must:
1) Select it in the child window
2) Drag it to the Wastebasket or press the DEL button
   a window appears asking if you want to:
      A) actually delete the document
      B) remove the document from its group
Answer remove

Modify Username & password

To modify the user name of the password you must:
1) select the Customize / User Name or Password menu options.
2) Fill the form
3) Answer OK.

IF YOU FORGOT THE PASSWORD use the installation diskette:
1) start setup
2) select in the first dialogue Modify Password
4) Insert the new Password
5) press OK.

Modify a Form caption

To modify a form caption you must:

1) Close Full Contact
2) Start the personalization program
3) Select the form you want to modify
4) Double click on an empty area

a dialog appears; here you may insert a new caption, a new menu name and a new internal name (the one that appear in the import export utility).

5) Answer OK
6) Save the Form
7) Build the system using the Save / Build main menu option

Modify a Form menu name

To modify a form caption you must:

1) Close Full Contact
2) Start the personalization program
3) Select the form you want to modify
4) Double click on an empty area

a dialog appears; here you may insert a new caption, a new menu name and a new internal name (the one that appear in the import export utility).

5) Answer OK
6) Save the Form
7) Build the system using the Save / Build main menu option

Add a New Form

To Add a new form you must:

1) Close Full Contact
2) Start the personalization program
3) Select the empty A or empty B.
4) Double click on an empty form area
   a dialog appears; here you must insert a new caption, a new menu name and a new internal name (the one that appear in the import export utility).
5) answer OK
6) Add the control you want to the new form (do not forget the OK control).
6) Uncheck the remove form menu item from the form menu
7) Save the form
8) Build the system using the Save / Build main menu option

Remove a Field from a Form

To Remove a field from a form you must:

1) Close Full Contact
2) Start the personalization program
3) Select the appropriate form.
4) Click near the field you want to eliminate.
   a border surround the field.
5) if the border surround just one field press DEL and answer OK then proceed with point 6
   if the border surround more than one field double click or press CR

A Dialogue appears. At the left of the field you want to eliminate a check box is checked; uncheck it.

Answer Ok.

The field disappears from the form; the other fields are rearranged.

6) Save the form
7) Build the system using the Save / Build main menu option

Add a field to a Form

To Add a field to a form you must:

1) Close Full Contact
2) Start the personalization program
3) Select the appropriate form.
4) If you think the field is part of a complex one (you want to add country informations to the address control)

   Click in the group you want to modify

      a border surround the field.

   Double click or press CR.

      A Dialogue appears. At the left of the field you want to add a check box is unchecked; check it.

      Answer Ok.

         The field disappears from the form; other fields are rearranged.

5) if you think the field is a new field:

   select from the Add menu the field You want to Add.

   A Dialogue appear. Fill it.

   Answer Ok.

      Place the new field.

6) Save the form
7) Build the system using the Save / Build main menu option

Change a field font

To Change a field font you must:

1) Close Full Contact
2) Start the personalization program
3) Select the appropriate form.
4) Double Click near the field you want to change.
    A Dialogue appears; it contains a Change Font button; click on it.
    The standard font dialogue appear, select the new font and save.
    Answer Ok.
    The field changes its font.
5) Save the form
6) Build the system using the Save / Build main menu option

Modify a field length

To Modify a field length you must:
1) Close Full Contact
2) Start the personalization program
3) Select the appropriate form.
4) Double Click near the field you want to modify.

A Dialogue appears. At the left of the field you want change there are two length fields: Length Db and Length V. .To change the screen length of the field modify the Length V. field; to change the Data Base Length of the field modify the Length DB field.
Answer Ok.
The dialogue closes.
Rearrange the control's fields if needed.

6) Save the form
7) Build the system using the Save / Build main menu option