Phone Log 6.0

By **Specialty Software**

System requirements: Microsoft Window™ 2000 / XP / Vista

Introduction:

In a busy office phone calls from your customers are very important. Sometimes important information is lost on little hand written notes. The many sticky notes can be lost, not readable, and a very slow system for a very important part of your business. This program makes logging calls quick and easy.

In some types of businesses, a regularly used phone log system can help avoid lawsuits and assure customers who call that their request is going to be completed.

Some benefits:

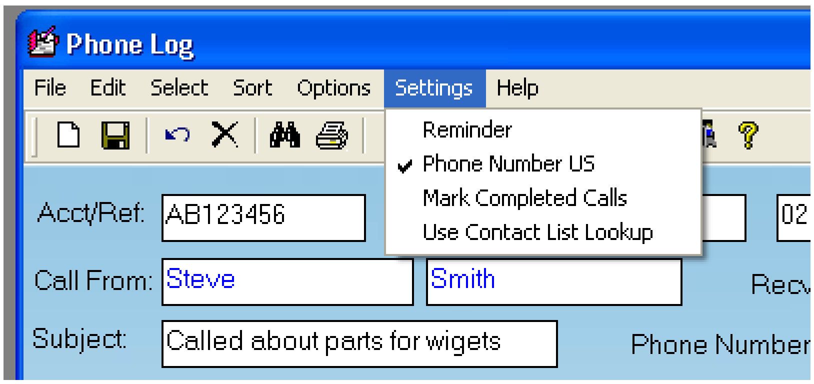
- Quick and easy data entry
- Easy follow up for completed requests
- Access to information centralized and easy to obtain
- Automated entry (time/date) with sort and search functions
- Professional printed reports
- Data export options
- Reminder option to notify you when uncompleted calls are present.

You can copy and paste information by using Control-C to copy and Control-V to paste data from record to record or to different Windows applications.

Phone Log version 6:

In version 6 a new screen has been added to allow you to use a "Contacts" database. To use this you select from the menu "Setting | Use Contact List Lookup". Some users of Phone Log have wanted a contacts list they can link the calls to and other do not want to enter all contact information and are concerned only with the call data itself. This new option allows the user to use either method. By selecting the "Use Contact List Lookup", when you enter a new call the caller information will be automatically pre-filled from "Contacts" database. If you use the contact list when entering a new call you need to enter the contact data first. This is so you can link the call to that contact person. If you choose not use the Contact List any previous calls by that same Acct/Ref number will be used to pre-fill the caller information. You may still use the "Contacts" database without use the lookup feature if you desire.

From the Contacts screen you can click the button to show all the calls related to that person. From the main Calls screen you can click the "Contacts" buttons to show detail of that contact. This way you can easily see related data from either screen.



There are many new features in version 6. A new "Call For" field for those offices who want to assign calls to specific people. You can then sort by this field and find all the calls related. There are also new reports for both the contacts and "Call For" selections.

Improvements to screen display and tool bar allowing for quick access to functions, security of the database has been included to protect the contact information being accessed outside of the application plus more.

The call list grid display has also been completely revised. You can now drag and drop columns in different positions, use the "Splitter" to hold the data you want to see on one side while scrolls across, and odd/even color scheme for easier reading.

Database Backup and Repair Utility:

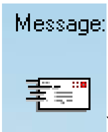
This application, which resides in the application folder ("DBUtility.exe"), can be ran at the end of the day to backup your data to a backup directory created under the Phone Log application folder. This database can then be used if necessary to replace the original "Phonelog3.mdb" file in case of corrupted data or other reasons. It is important that you make backups regularly. On the "Backup" option, you can select the "Increment" check box to automatically create a new folder by month and day. To import your contact data into the database, you may import CSV text file which must match the sample file ("contacts.csv"). This allows you ability to export your contact list and import the data to Phone Log.

Configure your Screen:

You can change the labels on the call screen to other text that better fits your business. To do this, in File Explorer go to the Phone Log application directory and with Notepad open

"PhoneCfg.ini". Simply change the text after the "=" sign to your text and save the file. Keep the length short enough to display.

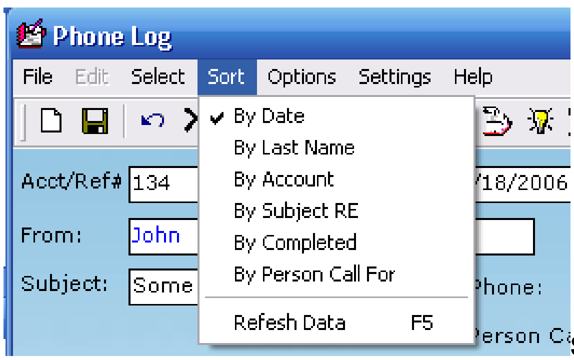
Email Calls:



You may email the selected calls from Phone Log automatically by clicking this icon. This requires an email application like Outlook Express or similar default email application.

Record Selection:

Most of the functions need little explanation. The arrows on the menu bar selects the records. The far left arrow puts you at the top of the list. The far right arrow puts you at the bottom of the list. You may also select records by clicking your mouse on the left side of the grid record selector.



Sorting:

To sort the records, select from the menu Sort by Date, by Account number, by Last name, by subject, and by Completed. The default sort option when the program is started is by Date.

Adding Records:

To add records, select the "Add" button or from the menu "Select" or Ctrl-A. When you add a record the current date and time is automatically inserted for you. You may override any of these entries with your own. If you enter and "Account or Reference" number Phone Log will search to see if you have already this account number. If so, it will automatically pre-fill the caller information. You may want to a customer account number so that you may group all calls received from that one account.

Delete Records:

To delete records, select the record you want to delete and push the "Delete" button or Ctrl-D. You will be prompted to confirm permanent deletion of that record.

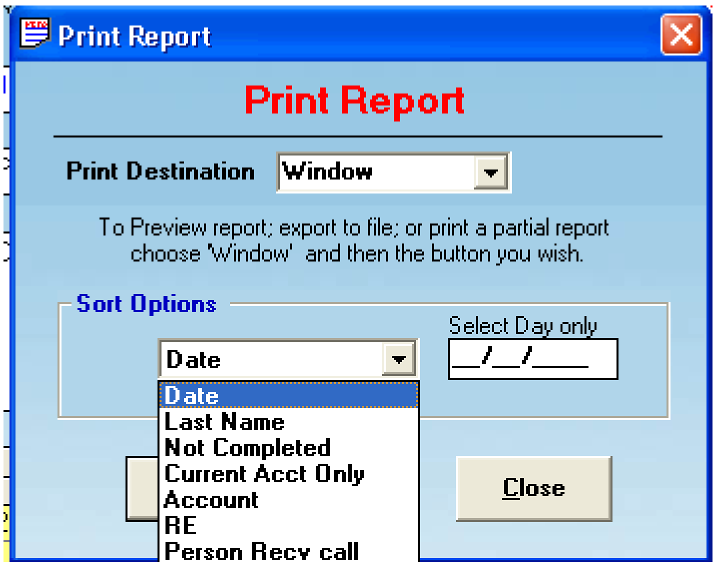
Delete Range:

Select from the menu "Select | Delete Range". You may delete old records by selecting all records prior to your input date. This permanently removes all files prior to the date you enter! So be careful when using this option!

Printing Options:

Select from the menu "Print" or Ctrl-P. You will see a dialog box asking you to select "Window" or "Printer". Selecting the Window (default) will allow you to preview the report and allows you other output options(See below). The print function uses your default printer. The "printer" option prints directly to your default printer all the entries in the database.

Print Sort options:



You can select the sort/search selection and report type by selecting the desired option from the drop down box.

*From the **preview "Window"** you can select (default selection):*

 The printer icon prints the viewed report. When you select to print, you can select to print selected pages only.

 The magnifying glass changes the view size. Each click toggles 3 size modes.

 The envelope exports the report as email text.

 The suitcase exports the report to a file. This option allows a number of export file types. This includes support for: MS Word, Excel, Text, CSV (can be used for importing to another application), RTF, plus more.

MODIFY RECEIVED LIST

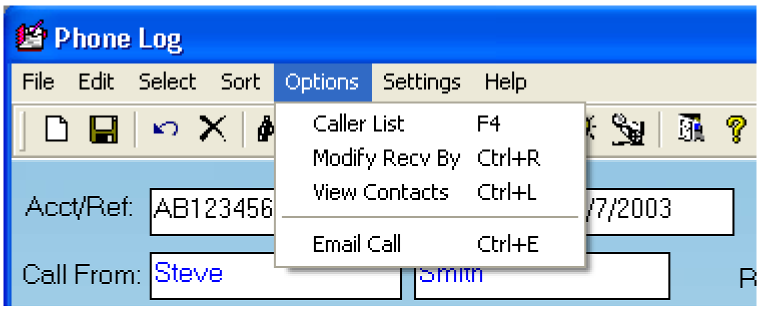
To add, remove or edit your list of people who receive the call, just double click the drop down box and an edit form will appear. To edit, select the name you want to change and type over it.

This is useful for multiple users in the same office and a quick way to select the name. To select the name you may enter the first letter and the list will position to the first name in the list with that letter.

ACCOUNT NUMBER

You can enter a customer account number, which could be the last five digits of their phone number or some other number which you are already using. This can be numbers, letters, or both. Two options allow you to either enter a account number or leave it blank so Phone Log will assign a number. If you enter an existing account number, the name and phone number will automatically be pre-filled.

In version 6 you may choose to use the contacts list.



CALLER LIST

This feature allows you to browse through your callers by name. Simply pressing "F4" will show the list screen or you may click this phone icon.

You may also use this to select the caller when receiving a call. After you "Add" a new record and select F4 to display the list, click on the line with name of person calling. Then press the "Select" button and that person account number and information is automatically pre-filled. This is only available when adding a new record.

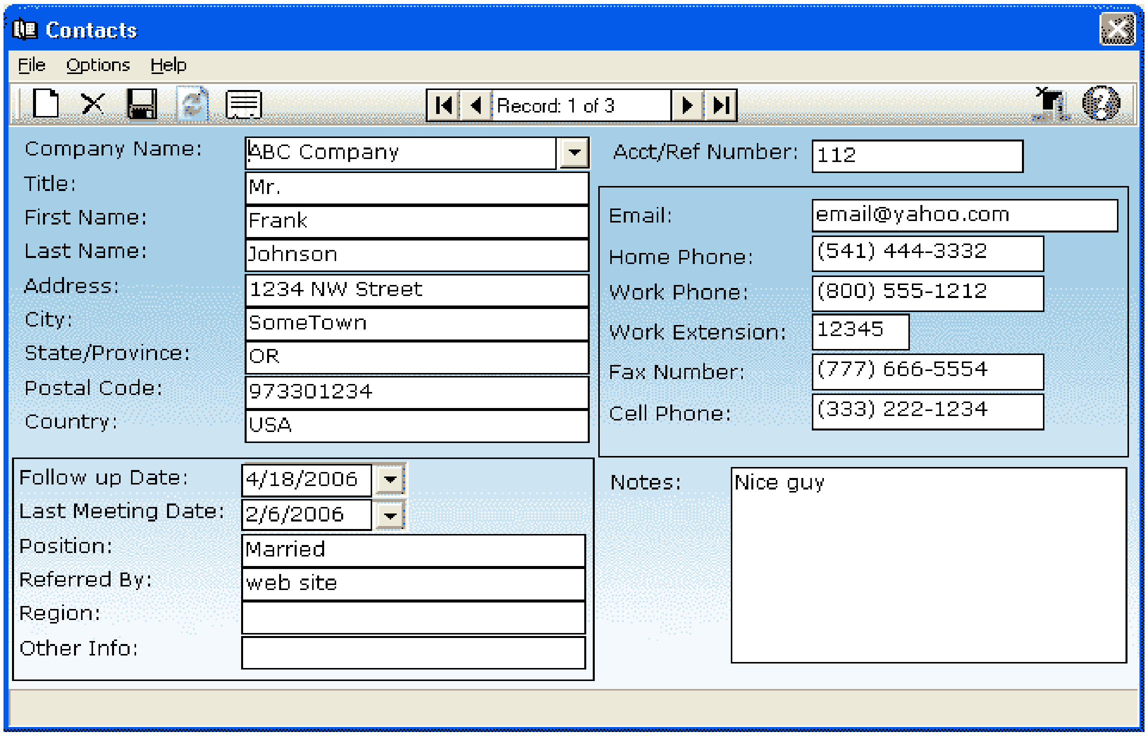
MODIFY RECV BY LIST

To add, edit or delete a list of people who receive the phone calls, just double click the Received Call drop box and a screen will display allowing you to change the list or select from the "Options | Modify Recv By" or Ctrl-R.

From the main call screen, to select the person the user can use the first letter like "P" for Paula or use the mouse and select from the drop down the list from the main screen.

VIEW CONTACTS

To view the contacts you may select "Options | View Contacts" or Ctrl-L or press the tool bar button. You will be presented with a contact screen. If call you are on a call that has an associated "Contact" record, it will displayed.



The buttons are from left to right: "Add, Delete, Save, Refresh, Show Calls, Record navigation, Close Screen, Help"

You may freely enter data on this screen. If you are using the "Use Contacts Lookup" setting, you should enter the contact information first before logging calls. The "Acct/Ref" must match both on this screen and the call screen to link the calls to the contact. You can be in either the main call screen and click "View Contacts" to see the detail of the caller OR from the "Contacts screen" you can select the yellow note (Show Calls) button to view the calls this contact has. This so you can view all related data from either screen.

REMINDER

A great feature is to help you keep on top of your list of calls. Select "Settings" and "Reminder". You can set the time to be reminded of overdue calls in hours or days. You can turn this option on or off. There is also an optional audible alarm sound besides a message on the screen when your uncompleted calls exceed your selected reminder time period. If you select "Reminder" a small alert window will also display in the bottom right hand corner of the monitor.

Phone Log will check your calls to make sure you are notified of uncompleted calls you need to call back.

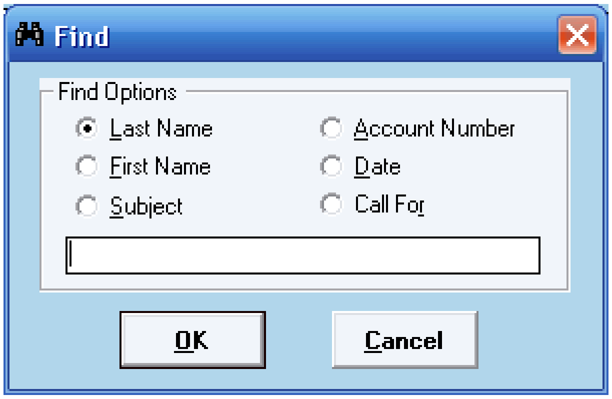
Phone Number US Option:

Under the menu item "Settings" is a selection "Phone Number US". If this is selected the format for the phone number will follow normal USA phone number format including a extension. Uncheck this option allows you to enter foreign country phone numbers or any special format you choose. **IMPORTANT:** THIS OPTION SHOULD BE SELECTED WHEN THE APPLICATION IS FIRST USED AND NOT CHANGED. This is because the data is stored differently based on this option and may not be displayed correctly if you switch back and forth.

MARK COMPLETED CALLS

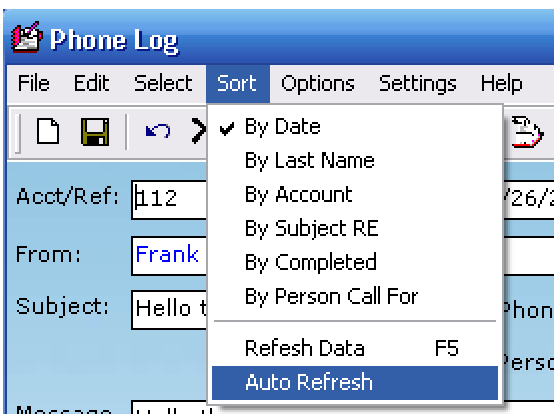
This option when selected adds a line to the message indicating the date, time and the user name who checked the "Completed" box on upper right of the screen. The name used will be the user name of the computer user.

FIND BY



You can search the database by the different options (Ctrl-F). Select one of the options you want to search for and enter the text.

REFRESH DATA



This option is for network versions only. By pressing "F5" the data entered by other users will be visible in your screen.

AUTO REFRESH

This automatically refreshes your data without pressing the "F5" key or selecting the menu. This will refresh about every five minutes.

NETWORK VERSION

To use this software on a office network, contact Specialty Software about additional license fee per user and installation and setup. Discounts apply based on quantity.

SUGGESTIONS OR PROBLEMS?

Call for quantity discounts. If you have any suggestions or problems with this program, please feel free to contact:

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For technical support, email: rwi@proaxis.com

Rev. 10/30/2008