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PhonePad 5 User Guide

by Cybercom Software

PhonePad 5 User Guide

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Chapter

1

Introduction

Introduction

Welcome to PhonePad 5.

If you're new to PhonePad we recommend you start with the Getting Started section.

A massive amount of work has gone into producing this version. In fact, it's the biggest update to PhonePad in years. It features a new, high performance database engine that allows us to do things that weren't possible in previous versions.

PhonePad 5 uses a completely different method for connecting. Instead of having to manually configure each workstation to connect to the PhonePad database it's now all done automatically.

We have incorporated a lot of changes and new features based on feedback from our wonderful customers. PhonePad is a continually evolving product that is shaped by people like you. We truly value your suggestions and look forward to receiving more of them.

We hope you enjoy using PhonePad 5 and find it a valuable tool for your business or organization.

Cybercom Software



While all due care is taken in the writing of this user guide, it's possible that there are errors because we have overlooked something.

If you find that there is missing, incorrect, incomplete, or out-of-date information, please contact us and let us know. We'll do our best to get it corrected quickly.

Just send an email along with the details to support@cybercom-software.com.

Thanks.

Chapter

2

Getting Started

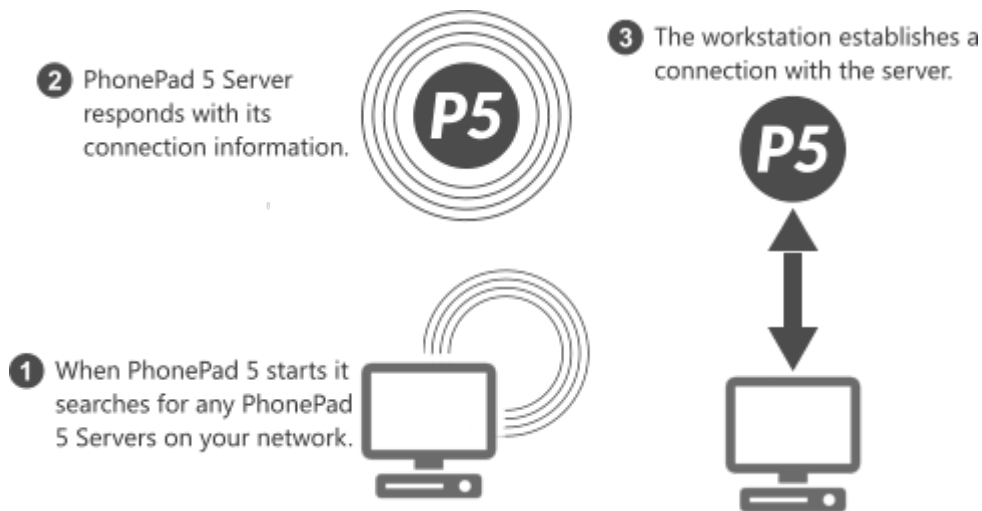
Getting Started

Follow the steps in this chapter to get PhonePad 5 up and running.

Setting Up the Connection to the Server

You may be pleased to know that once you have installed PhonePad 5 on your workstation there is nothing else you need to do. You don't need to configure PhonePad to connect to the Server or Host PC.

When PhonePad starts up it will try to auto-discover any PhonePad 5 Servers on your network. Your workstations will automatically establish a connection with the server once it finds it.



If PhonePad is unable to connect to the PhonePad 5 Server then it will be due to one of the following reasons:

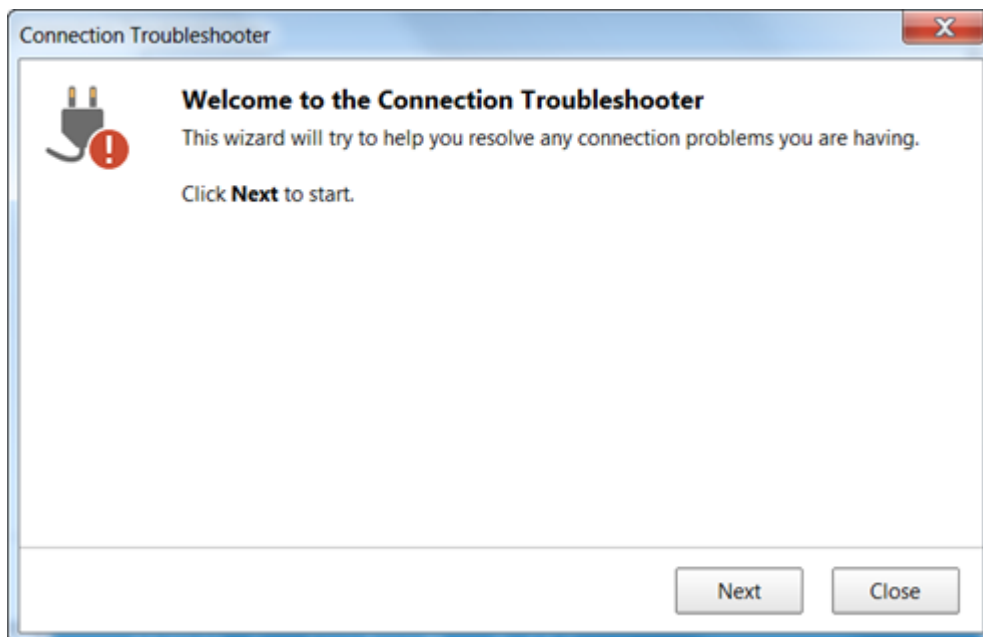
- The PhonePad 5 Server service has not been installed or is not running.
- A firewall, and/or security software, on the Server or Host PC, or on the workstation is blocking the connection. You may need to configure it to allow the connection.

Connection Troubleshooter

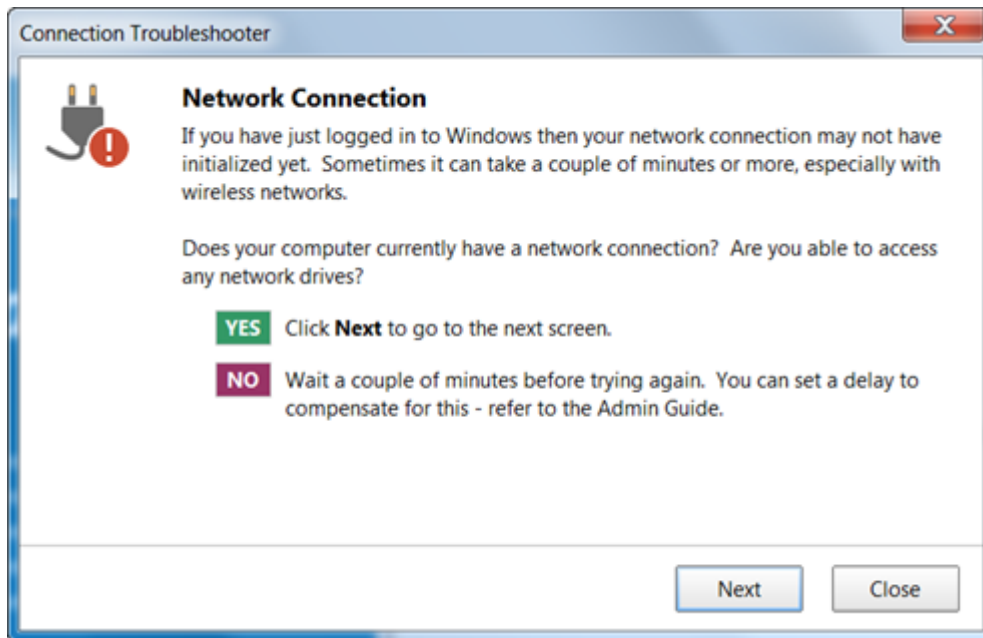
If PhonePad is unable to locate the PhonePad 5 Server, or if it is able to locate it but is unable to connect, then the **Connection Troubleshooter** wizard will automatically open.



The wizard will try to help you determine what is causing the connection issues. In most cases it is Anti-Virus software



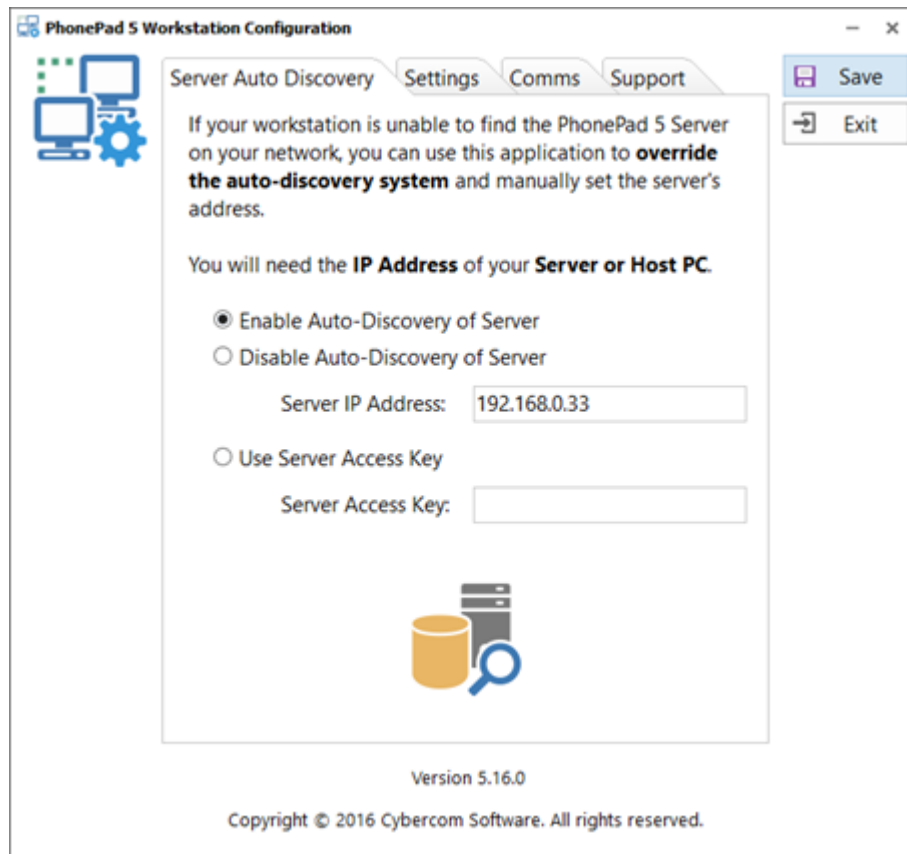
Step through each screen by clicking the **Next** button, and try each of the suggestions.



What to Do if PhonePad Can't Find the Server

If you have tried everything and still can't find out what is blocking PhonePad's automatic connection system, then you can override the server auto-discovery system by manually specifying the server settings.

1. Run the **Workstation Configuration** application (WorkstationConfig.exe) - it's located in the PhonePad 5 folder on each workstation.



2. Select **Disable Auto-Discovery of Server**.
3. Enter the Server's IP Address.
4. Click **Save**.
5. Click **Exit**.
6. Try starting PhonePad again. You should now be able to connect to the Server or Host PC.



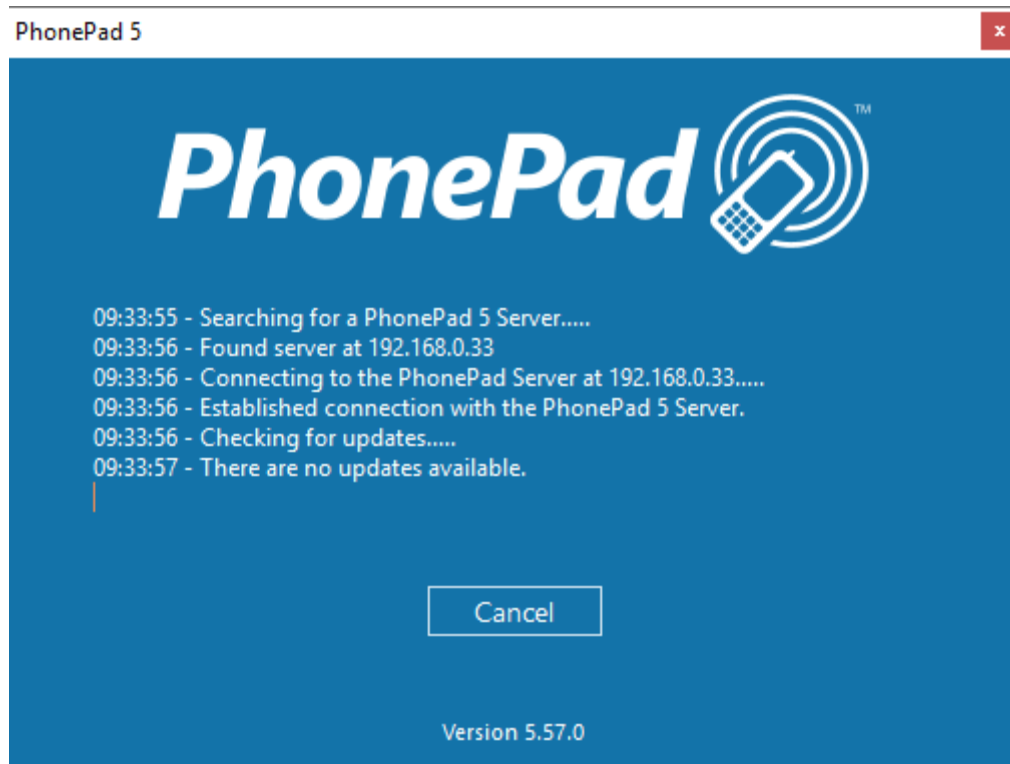
Using the ServerOverride setting will disable the automatic connection system so any changes to the Server IP Address will not be detected.

Starting PhonePad

Double-click the PhonePad 5 icon to start PhonePad.



PhonePad will auto-discover any PhonePad 5 Servers on the network and establish a connection.



It will then check for any workstation updates and install them if they are found.

The version number for the installed version of PhonePad is displayed at the bottom of this screen.

Version Mismatch

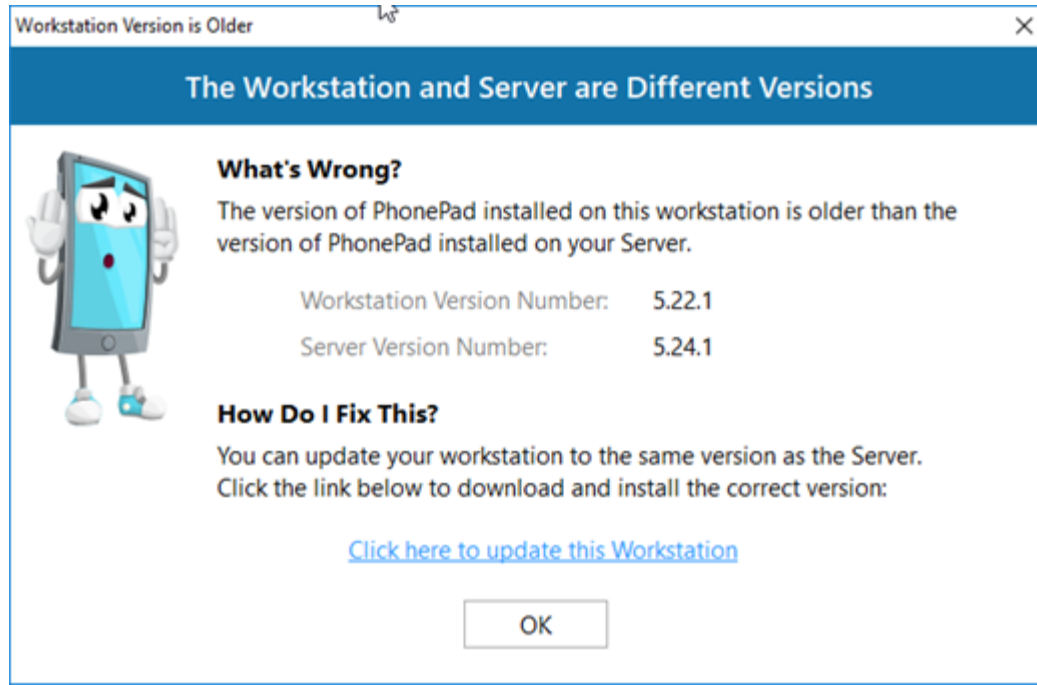
The PhonePad 5 Workstation and PhonePad 5 Server software should always be the same version. If they're not then PhonePad may not function correctly.

Normally you shouldn't have to worry about this as the PhonePad 5 Server should keep the versions on the workstations and Server/Host PC synchronized.

To avoid problems, PhonePad will check both version numbers on start up. If there is a version mismatch then an error message will be displayed.

Older Version on Workstation

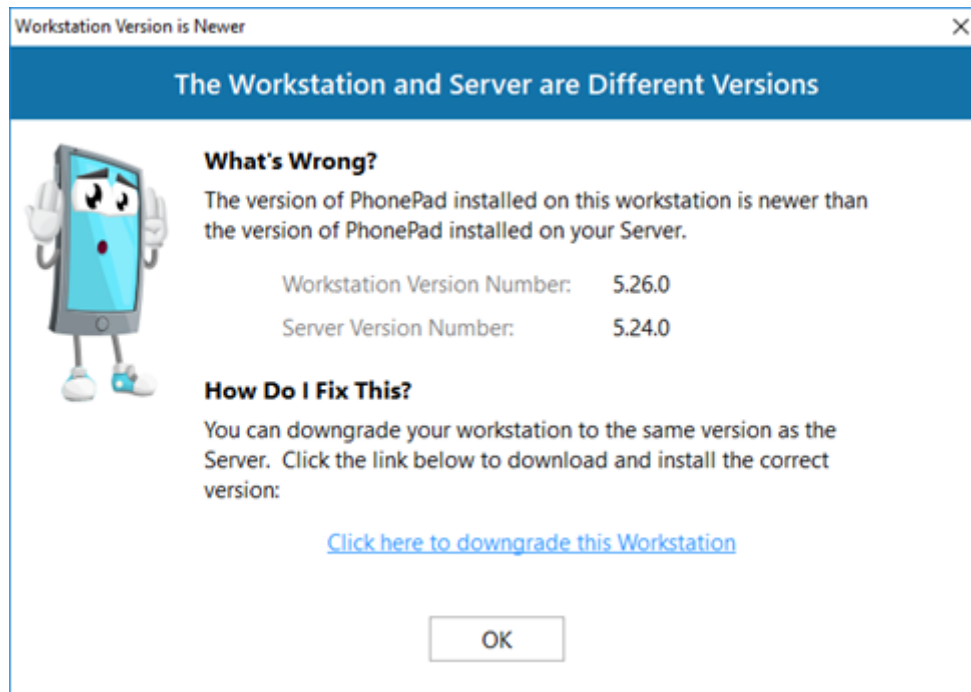
If the workstation version is *older* than the Server/Host PC version then this message will be displayed:



This can be easily resolved by clicking on the link in the message. PhonePad will automatically download the correct version for the workstation.

Newer Version on Workstation

If the version on the workstation is *newer* than the Server/Host PC then this version will be displayed:



This would only happen if the wrong version of PhonePad 5 Workstation was manually downloaded and installed on the workstation. For example, if you added a new computer to your network you may have accidentally downloaded the latest version of the workstation software from the website instead of downloading the version installed on all other workstations.

This can be quickly fixed by clicking the provided link to download and install the correct version.

What Can Cause a Version Mismatch?

The most common cause of a version mismatch between the PhonePad 5 Workstation software and the PhonePad 5 Server software is this scenario:

- PhonePad 5 is already up and running on a network and a new computer is installed. PhonePad 5 Workstation is downloaded from the website and installed on the new computer, but the version downloaded is a more recent version.

There are 3 ways to avoid this scenario:

1. Retain a copy of the original Workstation setup program you downloaded when you installed PhonePad. Use this copy to install PhonePad 5 Workstation on all new computers.
2. Install PhonePad 5 Server Updates whenever they are released.
3. Keep your system up-to-date with the latest releases by setting up automatic updates.

Another far less likely cause is that the automatic workstation updates done by the PhonePad 5 Server have failed for some reason. This can happen if the workstation has insufficient access rights for the PhonePad 5 folder.

Trial Period

If you are using PhonePad during the trial period you will see the trial screen appear when PhonePad starts up.



The image shows a trial screen for PhonePad 5. On the left is a cartoon character of a blue smartphone with a smiling face, arms, and legs. To the right of the character is the PhonePad logo, which consists of the word "PhonePad" in a bold, sans-serif font, followed by a blue circular icon containing a white smartphone and signal waves. Below the logo, the text reads: "Thank you for trying PhonePad 5. You can try PhonePad for 60 days free of charge. Once the trial period has expired, you will need to purchase PhonePad to continue using it. There is no need to reinstall PhonePad after purchasing a license. We have been in business since 1995 and we are here to help any way we can. For more information about PhonePad, please contact us or visit our website." Below this text are contact details: Website: www.phonepad5.com, Email: sales@cybercom-software.com and support@cybercom-software.com, Telephone: 1-866-806-2144 (Toll Free in US and Canada) and 1800-856-453 (Toll free in Australia). At the bottom, a bold message states "You have 60 days left of your 60-day trial." Below this message are five buttons: "Continue Trial" (with a play icon), "Buy Now" (with a shopping cart icon), "License" (with a key icon), "Extend Trial" (with a refresh icon), and "Exit" (with a door icon).

PhonePad

Thank you for trying PhonePad 5. You can try PhonePad for 60 days free of charge.

Once the trial period has expired, you will need to purchase PhonePad to continue using it. There is no need to reinstall PhonePad after purchasing a license.

We have been in business since 1995 and we are here to help any way we can.

For more information about PhonePad, please contact us or visit our website.

Website: www.phonepad5.com

Email: sales@cybercom-software.com
support@cybercom-software.com

Telephone: 1-866-806-2144 (Toll Free in US and Canada)
1800-856-453 (Toll free in Australia)

You have 60 days left of your 60-day trial.

[Continue Trial](#) [Buy Now](#) [License](#) [Extend Trial](#) [Exit](#)

The number of days left of your trial will be displayed on this screen.

Click the **Continue Trial** button to continue using PhonePad.

Click **Purchase** to buy PhonePad.

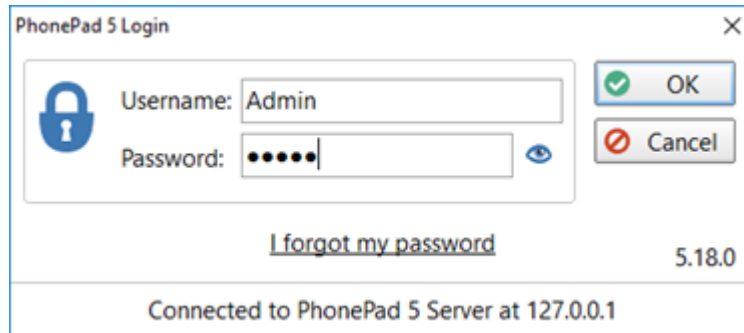
Click **License** to change your trial version into a fully licensed version. Once this has been done the trial screen will no longer appear.

Click **Extend Trial** if your trial period is almost over and you need more time to evaluate. This will extend the trial by another 60 days, and you can use it twice (giving you a total of 180 days). **Please note:** this button only becomes enabled a couple of days before your trial ends.

Click **Exit** to close PhonePad.

Logging In

The login dialog is displayed when PhonePad starts up.



Enter the **username** and **password** provided to you by your PhonePad administrator.

The **username** is *not* case-sensitive but the **password** is. Make sure **CAPS LOCK** is **not** on.

Once you have typed in your user name and password, click **OK** to continue the login process. You will be given *three attempts* to login. After a third unsuccessful attempt PhonePad will automatically shut down.

If you click on the "eye" icon and hold down your mouse button, it will reveal the password you entered. You can use this to verify that you entered your password correctly.

If you have forgotten your password, you can click the **I forgot my password** link to have your password sent to your email address or cell/mobile phone (this feature has to be enabled by your PhonePad administrator).

The login dialog also shows the version number of PhonePad you are using (in this example it is *5.18.0*), and the PhonePad Server you are connected to.

Splash Screen

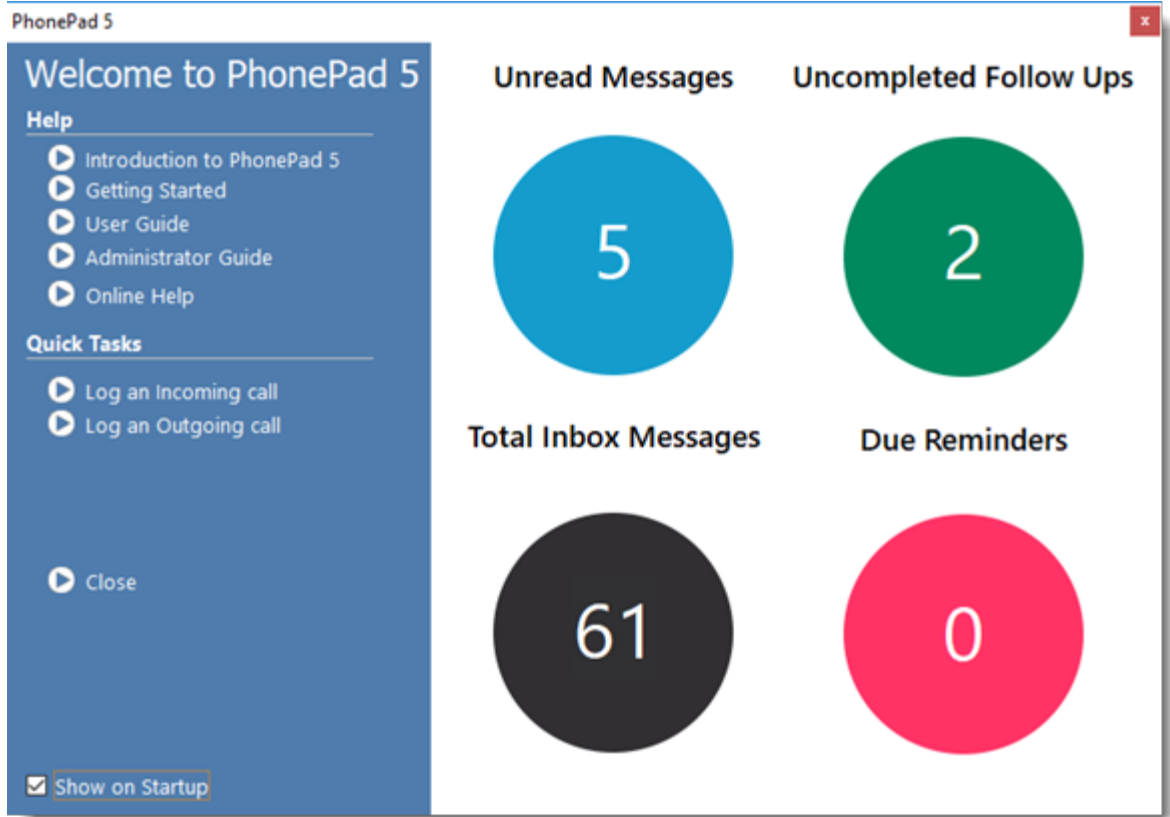
The splash screen will be displayed while PhonePad 5 is loading and will automatically close when it has finished.



If you get an error message when PhonePad is loading (or suspect there might be one) but you can't see it because it's being obscured by the splash screen, just **double-click** on the splash screen to close it.

Welcome Screen

After you login, the Welcome window should be displayed (unless the **Show on Startup** check box has been unchecked).



This window has a number of handy links in addition to a graphical overview of the current status of all of your messages.

Tip of the Day

The **Tip of the Day** window will automatically appear after logging in to PhonePad.



A tip is randomly selected and displayed. Tips inform you about many of PhonePad's features and are tell you about things you may not know about your new software.

You can click the **Next Tip** button to randomly display other tips.

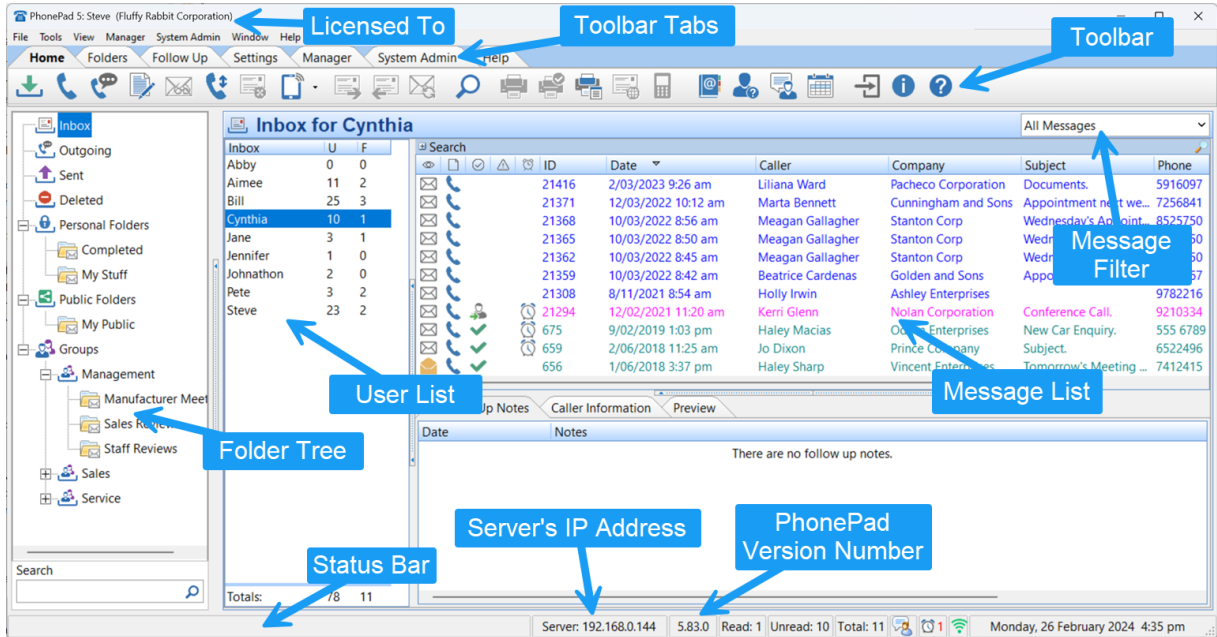
The **Close** button will close Tip of the Day.

If you don't want tips being displayed, uncheck the **Show on startup** checkbox *before* clicking **Close**.

You can access Tip of the Day at any time by selecting **Tip of the Day** from the **Help** menu.

User Interface

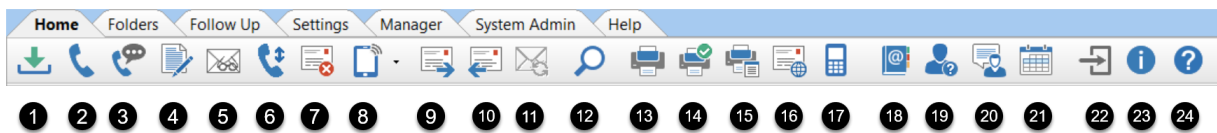
The main window features menus, a multi-tabbed toolbar, the folder tree, the inbox, follow up notes and the status bar. The window's title bar shows the currently logged-in user.



Toolbar

PhonePad 5 features a multi-tab toolbar, organized by functionality. These features can also be accessed via the menus.

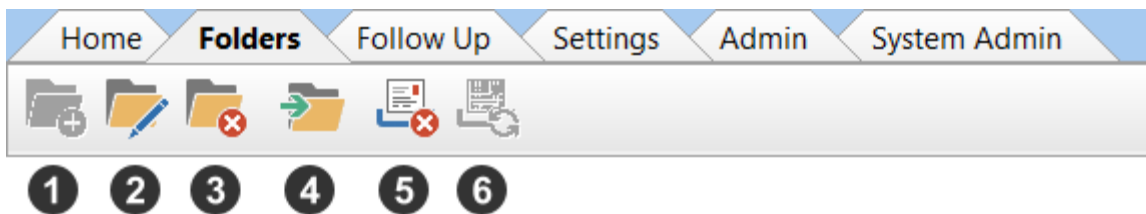
Home Tab



1	Check for new messages.
2	Create new incoming phone message.
3	Create new outgoing phone message.
4	Create text message (not to be confused with SMS messages).
5	View message.
6	View CallFlow.
7	Delete message.
8	Short Messages.

9	Forward message.
10	Reply to message.
11	Resend message (only applies to message in the Sent folder).
12	Search for a message.
13	Print message.
14	Quick print message.
15	Print message list.
16	Email selected message.
17	Dial phone number in the selected message (requires TAPI devices).
18	Access the PhonePad Address Book.
29	Open WhereRU, the PhonePad In-Out Board.
20	Open Instant Chat, and instant messaging application included with PhonePad.
21	Appointment Calendar. Open the Appointment Calendar application.
22	Exit PhonePad (also logs out).
23	Show About window.
24	Show online help.

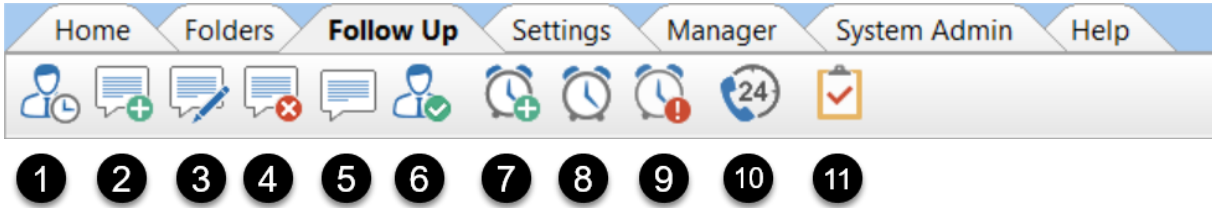
Folders Tab



1	Create a new folder.
2	Edit a folder.
3	Delete a folder.
4	Move messages to another folder.
5	Empty a folder.

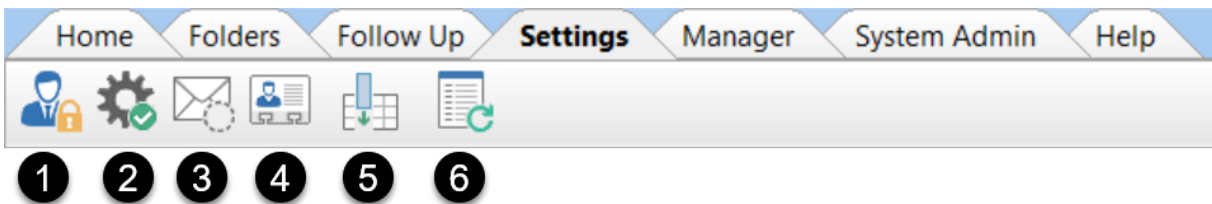
6	Undelete a message in the Deleted folder.
---	---

Follow Up Tab



1	Mark/unmark message for Follow Up.
2	Add Follow Up note.
3	Edit Follow Up note.
4	Delete Follow Up note.
5	View Follow Up note.
6	Mark Follow Up as Completed.
7	Add Reminder.
8	Manage Reminders.
9	View Reminders.
10	View Incoming and Outgoing calls captured by Caller ID.
11	Open the To Do List application included with PhonePad.

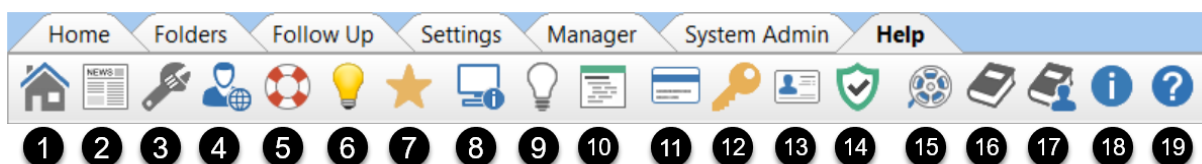
Settings Tab



1	Change PhonePad password.
2	User Preferences.
3	Automatic Message Forwarding settings (requires MessageSender 6 to work).

4	Caller ID Settings.
5	Select the columns you want displayed in the selected message list. Each of the message lists can be set independently of each other, eg. Inbox, Sent folder, Outgoing folder, etc.
6	Refresh all lookup lists. The lookup lists are updated regularly but it can sometimes take a little while to propagate to all workstations. You can force the lookup lists to update immediately.

Help Tab



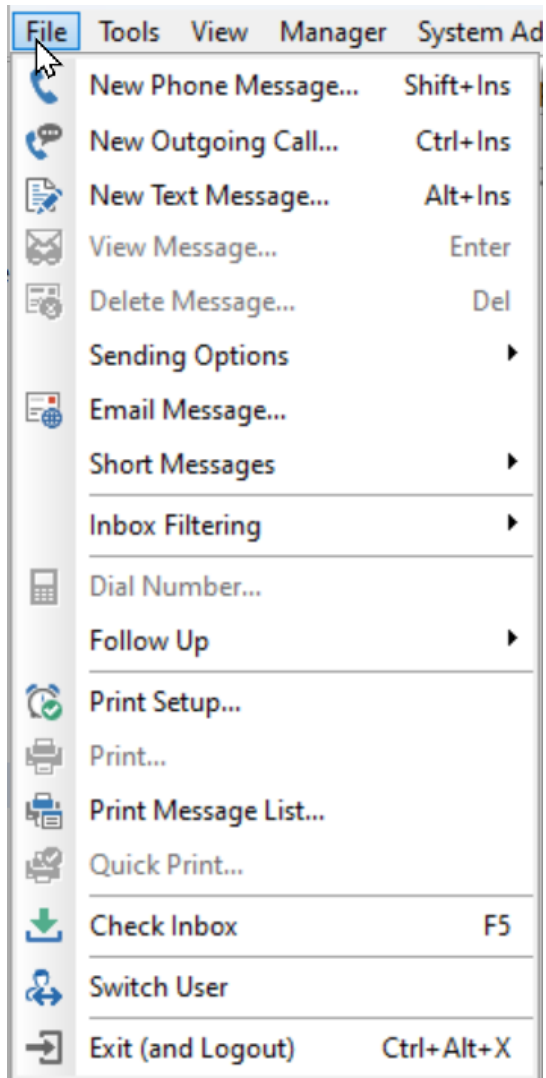
1	Go to PhonePad Home Page.
2	View the Latest News on the Cybercom Software Blog.
3	Access the online support center when you need help with something.
4	Go to your online PhonePad account.
5	Lodge a support request. You can alternatively send an email to support@cybercom-software.com
6	Send us your suggestions. We love getting feedback. Suggestions often lead to valuable new features so have at it.
7	Leave a review of PhonePad and Appointment Calendar. Your review is invaluable in informing and attracting new customers. This helps us stay in business, developing PhonePad and new products we have lined up. Please consider leaving a review. It only takes a couple of minutes.
8	Display important system information. Often needed for support purposes.
9	Show Tip of the Day.
10	View the What's New window.
11	Buy PhonePad 5 if you don't already have a license, or upgrade to another version or edition.
12	Enter your license details to license your copy of PhonePad. This is a system-wide setting so it only needs to be done once.
13	Display your PhonePad license details.
14	Display your current Update Plan details.

15	Go to the Video Tutorials page on our website.
16	View the Admin Guide
17	View the User Guide.
18	Show About window.
19	Show online help.

Menus

PhonePad 5 has 6 menus. Many of the features covered by the menus can also be accessed via the toolbar.

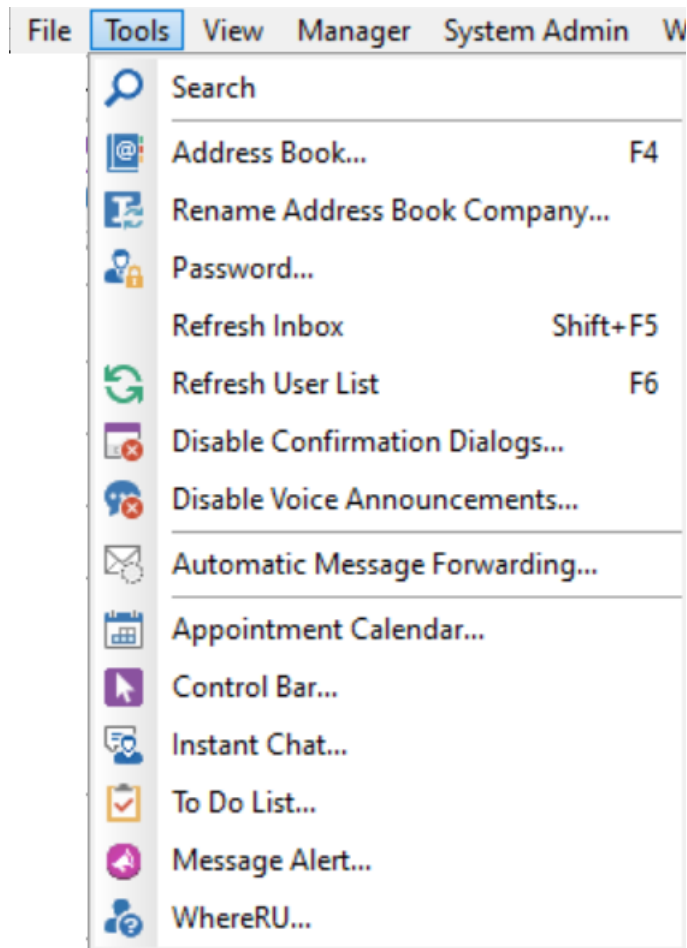
File Menu



New Phone Message	Open a new phone message for logging an incoming call.
New Outgoing Message	Open a new phone message for logging an outgoing call.
New Text Message	Open a new text message. This is not the same as an SMS text message.
View Message	Open the selected message for viewing.
Delete Message	Delete the selected message. Deleted messages are moved to the Deleted Folder.
Sending Options	Forward, reply to, or resend the selected message.
Email Message	Email the selected message.

Short Messages	Send a quick message via Pushover or SMS.
Inbox Filtering	Filter the messages in the Inbox.
Dial Number	Dial the phone number contained in the selected message, if you have a TAPI compliant device attached.
Follow Up	Mark/unmark a message for Follow Up, or mark a message as completed.
Print Setup	Specify the default printer to use.
Print	Print the selected messages.
Print Message List	Print a list of all messages.
Quick Print	Print the selected messages using a simplified layout.
Check Inbox	Check for any new messages.
Switch User	Click Switch User to logout of PhonePad and login as a different user.
Exit (and Logout)	Log out of PhonePad and close it.

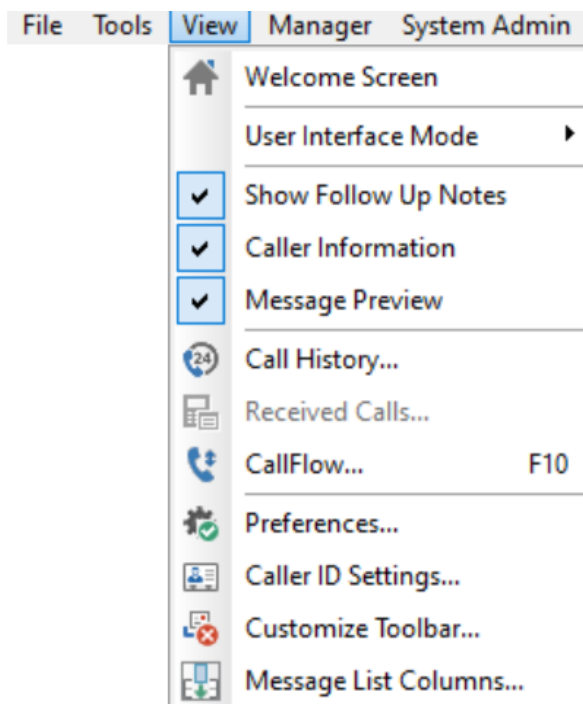
Tools Menu



Search	Search for messages by caller, company, phone number, message text and subject.
Address Book	Maintain all of your PhonePad contacts.
Rename Address Book Company	Rename a company wherever it appears in the Address Book.
Password	Change your PhonePad password.
Refresh Inbox	Force update the message list in Inbox.
Refresh User List	Refreshes the user list if it is displayed. The user list is only displayed if you have access to other user's folders.
Disable Confirmation Dialogs	Provides a way to disable all confirmation dialogs at once, instead of disabling them individually in Preferences.

Disable Voice Announcements	Provides a way to disable all voice announcements at once, instead of disabling them individually in Preferences.
Automatic Message Forwarding	Specify your message forwarding settings. Requires MessageSender 6.
Appointment Calendar	Open the PhonePad Appointment Calendar.
Control Bar	This toolbar gives you quick access to common PhonePad features. It runs separately from PhonePad.
Instant Chat	Open InstantChat, the instant messaging application.
To Do List	Open the To Do List application.
Message Alert	If you have access to multiple Inboxes, Message Alert can give you new message notifications for each Inbox.
WhereRU	Open WhereRU, the staff availability application.

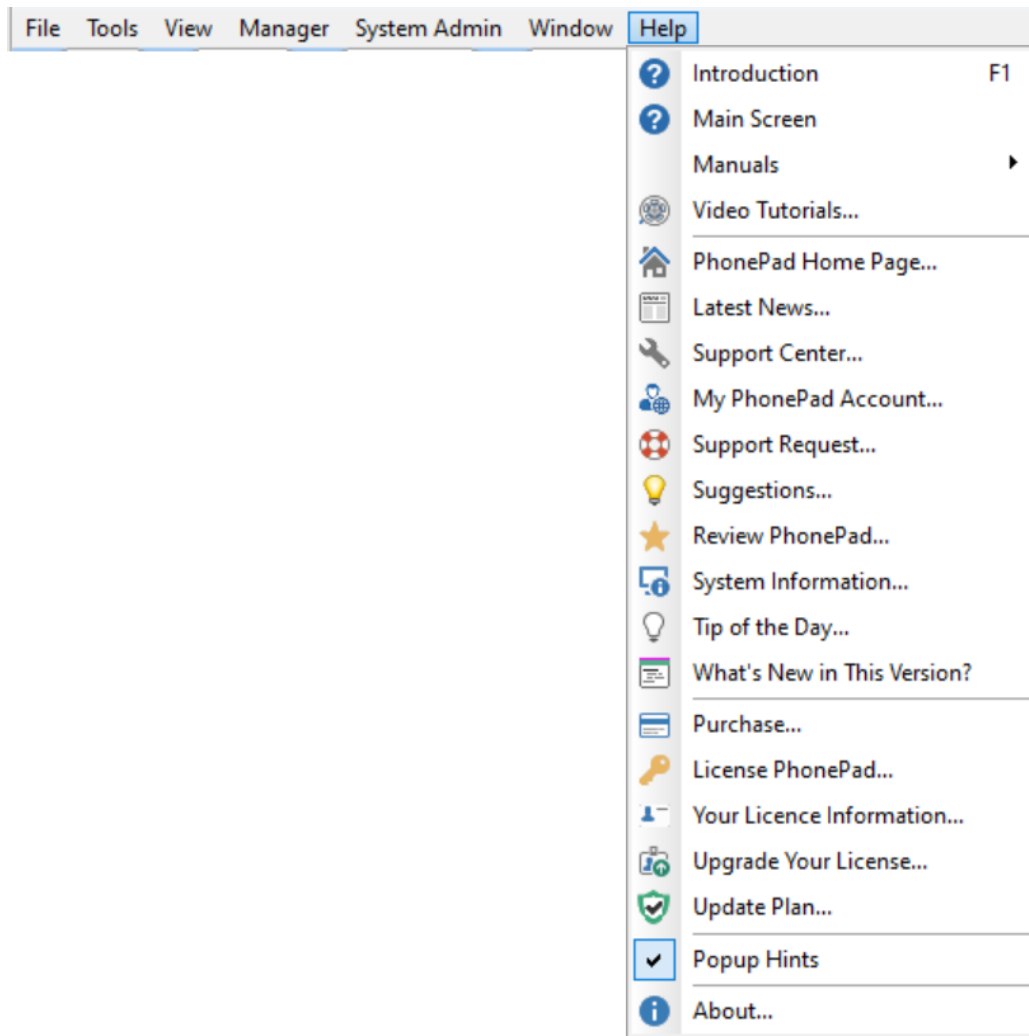
View Menu



Welcome Screen	Open the Welcome window. This window can be set to display at startup.
User Interface Mode	Select the User Interface Mode most suitable to the way you work: Basic, Standard, Advanced and Custom.

Show Follows Ups	Show/Hide the Follow Ups tab.
Caller Information	Show/hide the Caller Information tab.
Message Preview	Show/hide the Message Preview tab.
Call History	Open the Call History window. If your network has a CallerID.com device connected then this window will show all incoming and outgoing calls.
Received Calls	Open the Received Calls window. If the computer is connected to a TAPI-compliant device then this window will show all phone calls received.
CallFlow	Open the CallFlow window, which displays all messages for the selected caller.
Preferences	Customize your personal settings for various features.
Caller ID Settings	If you have a TAPI-Compliant device or a CallerID.com device, then you can configure PhonePad to use them by selecting this option.
Customize Toolbar	Allows you to show or hide buttons on the various toolbars so that only the buttons you use are displayed.
Message List Columns	Set the columns you want appearing in each folder. Edits the message list in the selected folder.

Help Menu

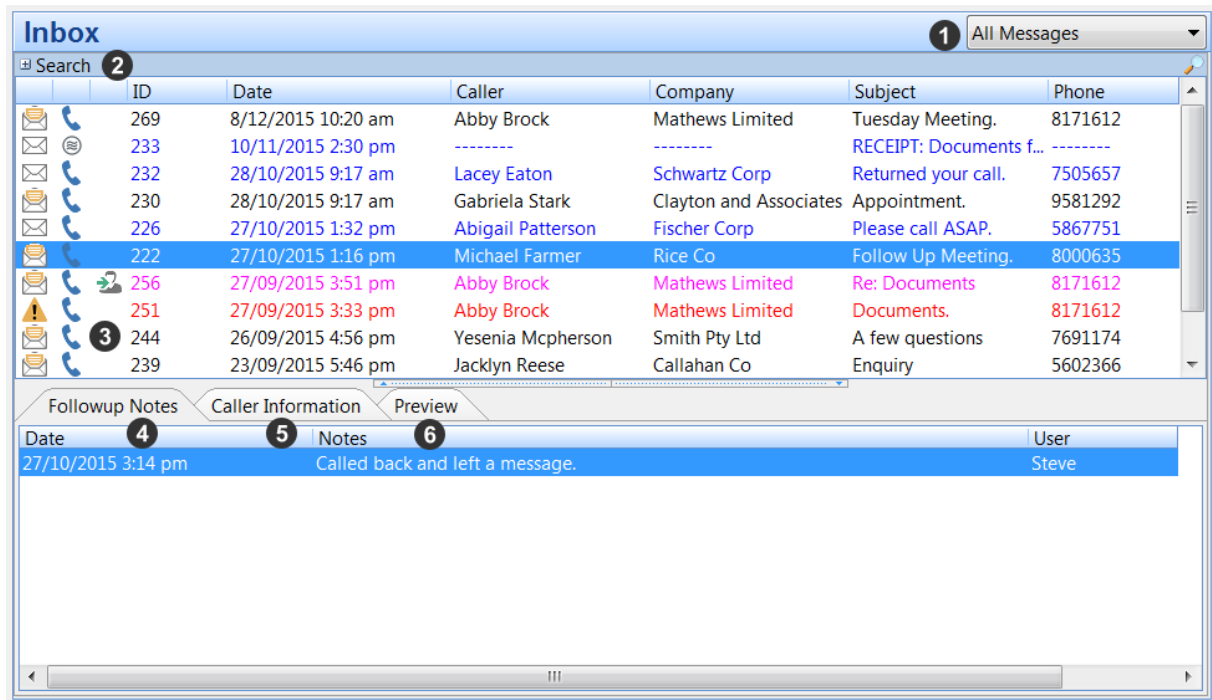


Introduction	Display online help.
Main Screen	Display an online help topic about PhonePad's main window.
Manuals	Open the User Guide and/or Admin Guide from within PhonePad.
Video Tutorials	Go to the Video Tutorial page on the website.
PhonePad Home Page	Go to the PhonePad home page.
Latest News	View the latest PhonePad news.
Support Center	Access the online support center when you need help with something.
My PhonePad Account	Go to your online PhonePad account (My PhonePad) where you can view your license details, update your contact information, etc.

Support Request	Lodge a support request if you're having problems.
Suggestions	Tell us your suggestions for improving and enhancing PhonePad.
Review PhonePad	Reviews help potential customers make an informed decision about purchasing PhonePad, and help us get more customers so that we can continue to develop it.
System Information	Displays important system information. Often needed for support purposes.
Tip of the Day	Displays random tips designed to help you get the most out of your software.
What's New in This Version	Displays the changes that have been made in the installed version of PhonePad 5.
Purchase	Buy PhonePad 5 if you don't already have a license, or upgrade to another version or edition.
License PhonePad	Enter your license details to license your copy of PhonePad. This is a system-wide setting so it only needs to be done from one workstation.
Upgrade Your License	Upgrade your license to add more users.
Your License Information	Display your PhonePad license details.
Update Plan	Display your current Update Plan details.
Suggestions	Tell us your suggestions for improving and enhancing PhonePad.
Popup Hints	If checked, popup hints will be displayed for toolbar buttons.
About	Display information about PhonePad.

Inbox

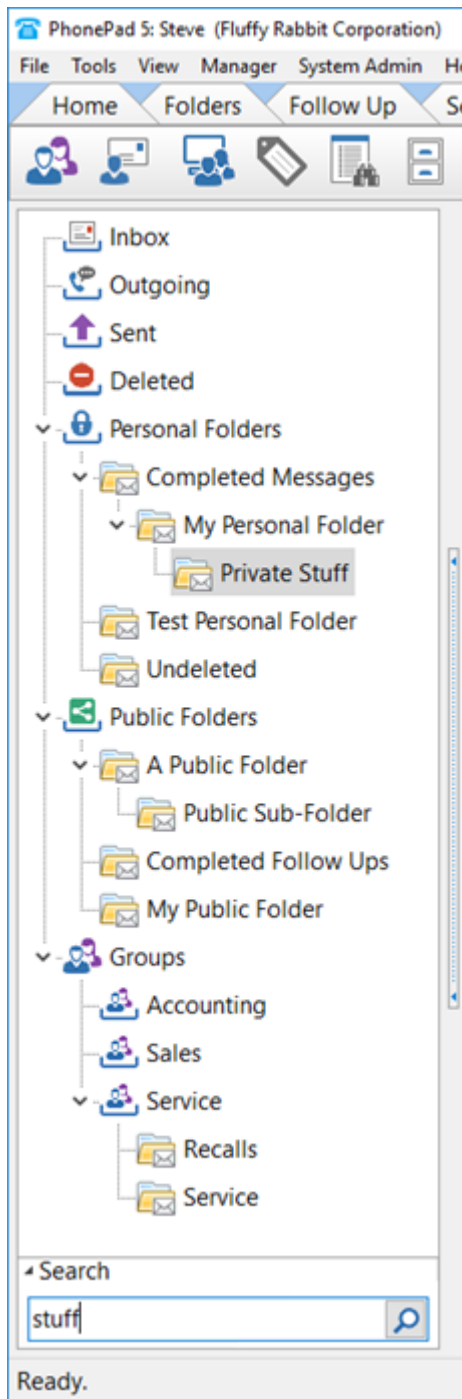
The Inbox is where you'll probably spend most of your time in PhonePad. It contains all of the messages you receive.



1	Message Filter. Select the filter you want to apply from the drop-down menu.
2	The Search option allows you to search for messages in your Inbox. Click the small button to open the search feature.
3	Inbox message list. Like the other folders, the Inbox features a color-coded message list.
4	The Follow Up Notes tab displays all notes for the selected message.
5	The Caller Information tab displays contact information for the caller in the selected message. You can show/hide this tab on the View menu.
6	The Preview tab shows a preview of the selected message. You can show/hide this tab on the View menu.

Folder Tree

The Folder Tree gives you quick and easy access to all of the folders in PhonePad.

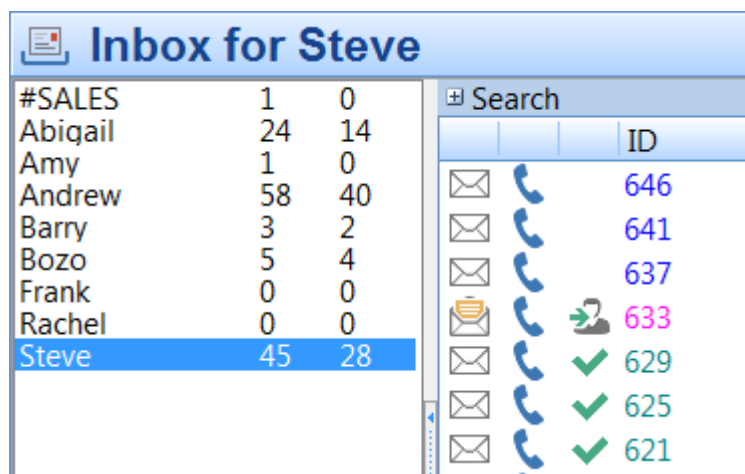


Inbox	The Inbox is the default folder view in PhonePad and it is where you access all of your received messages.
Outgoing	Any outgoing calls you log can be found in the Outgoing folder.
Sent	When you log an incoming call and send the message to other users, PhonePad keeps a copy of these messages in the Sent folder.

Deleted	The Deleted folder is where your messages end up when you delete them. If you need to undelete a message go to this folder. <u>Important</u> : any messages in the Deleted folder are automatically deleted by the system after 14 days.
Personal Folders	The Personal Folders folder is a storage area for any personal folders you have created.
Public Folders	The Public Folders folder is a storage area for any public folders that exist in PhonePad, ie. any public folders created by you or anyone else.
Groups	Groups shows all of the Groups you have been given access to by a PhonePad administrator. Each group will list any Group folders belonging to that group.

User List

If you have been given access to other user's Inboxes by a PhonePad administrator, a user list will appear to the left of your Inbox.



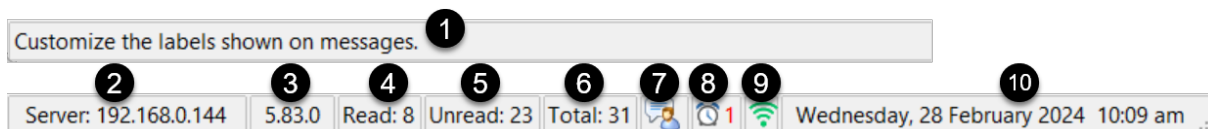
You can access another user's Inbox simply by selecting their name from the user list. You will then be able to access all of the messages in their Inbox.

If you are a member of a group that has an Inbox, you will also be able to access the group inbox. Group Inboxes are always in upper case and are prefixed with a #.

The two columns next to each user's name show the number of unread messages and the number of messages not yet followed up.

Status Bar

The Status Bar sits at the bottom of the PhonePad main window.



1	The left side of the Status Bar displays extended hints when the mouse is moved over toolbar buttons and menu items.
2	Displays the IP Address of the PhonePad Server you are connected to.
3	Displays the PhonePad Version Number.
4	Shows how many unread messages are in your Inbox.
5	Shows how many read messages are in your Inbox.
6	Shows the total number of messages that are in your Inbox.
7	Click to access Instant Chat.
8	Shows how many due reminders you have. Click to view the due reminders.
9	Status indicator for the PhonePad Workstation Notification Service. This should be green.
10	Shows the current date and time. The format is controlled by System Rules, which is set by a PhonePad administrator.
11	The resize handle allows you to resize the main screen.



If you click on the *Unread Messages*, *Read Messages* or *Total Messages* parts of the **Status Bar** your Inbox messages will be filtered for you.

Message Lists







Every folder in PhonePad has a message list. A message list shows all of your messages contained in that folder.

Search							
	ID	Date	Caller	Company	Subject	Pho...	
	291	21/01/2016 3:59 pm	-----	-----	RE: System Issues.	-----	
	288	21/01/2016 9:38 am			fwd: Phone Message.		
	286	21/01/2016 8:17 am	Abby Brock	Mathews Limited	Test	817...	
	282	20/01/2016 9:50 pm			Test Message.		
	280	20/01/2016 8:26 pm	Abby Brock		Urgent Matter.	889...	
	275	20/01/2016 11:17 am	Abby Brock	Mathews Limited	Golf on Thursday?	817...	
	269	8/12/2015 10:20 am	Abby Brock	Mathews Limited	Tuesday Meeting.	817...	
	233	10/11/2015 2:30 pm	-----	-----	RECEIPT: Documents f...	-----	
	232	28/10/2015 9:17 am	Lacey Eaton	Schwartz Corp	Returned your call.	750...	
	230	28/10/2015 9:17 am	Gabriela Stark	Clayton and Associates	Appointment.	958...	
	226	27/10/2015 1:32 pm	Abigail Patterson	Fischer Corp	Please call ASAP.	586...	
	222	27/10/2015 1:16 pm	Michael Farmer	Rice Co	Follow Up Meeting.	800...	
	207	29/09/2015 8:40 am	Abby Brock	Mathews Limited	New call from Abby.	817...	
	256	27/09/2015 3:51 pm	Abby Brock	Mathews Limited	Re: Documents	817...	
	251	27/09/2015 3:33 pm	Abby Brock	Mathews Limited	Documents.	817...	

Message List Columns

Message lists are divided into a number of columns:

	<p>The first column shows the read status of a message.</p> <ul style="list-style-type: none"> The message has not been read. The message has been read. The message has not been read and is urgent.
	<p>The second column indicates the type of message.</p> <ul style="list-style-type: none"> This is a phone message. This is a text message. This is a message read receipt. This is a forwarded phone message. This is a forwarded text message. This is a reply to a phone message. This is a reply to a text message.

	 This is an Outgoing call.  This is an email reply.  This is an email read receipt.  This is an email delivery failure.
	<p>The third column indicates the Follow Up Status of the message.</p> <p>If there is no icon then the message is not marked for Follow Up.</p>  The message is marked for Follow Up.  Follow Up has been completed on this message and no further action is required.
ID	This column shows the Message ID.
Date	This column shows the date and time of the message.
Caller	This column shows the Caller if it is a phone message. It will be blank for text or system messages.
Company	This column shows the Company if it is a phone message. It will be blank for text or system messages.
Subject	This column shows the Subject of the message.
Phone	This column shows the phone number if it is a phone message. It will be blank for text or system messages.
Category	This column shows the Category selected for the message.
Reference	This column shows the Reference field from the selected message.
Identification	This column shows the Identification field from the Address Book entry for the caller.
Contact Type	This column show the Contact Type field from the Address Book entry for the caller.

Changing the Order of Columns

You can change the order of columns displayed in the message lists. This is done by clicking on a column and, while keeping the left mouse button pressed, dragging it to a new position. The insertion point will be highlighted with two red arrows.

Inbox					
Search					
		ID	Caller	Caller	Company
✉	📞	568	17/11/2015 2:24 pm	Adela Bender	Patton and
✉	📞	567	1/11/2015 9:09 am	Abby Hansen	Miranda Co
✉	📞	566	19/10/2015 10:09 am	Test	Test
✉	📞	565	10/10/2015 9:50 am	Test	Test

Follow Up Notes Caller Information

Date	Notes	Use
------	-------	-----

In the above example, the **Caller** column is being moved to a new position.

PhonePad will remember these positions so that they are persistent between PhonePad sessions.

Changing the Width of Columns

You can change the width of columns in the message lists. Just place your mouse cursor over the line between column headings and when it changes to a double-arrow cursor, click and hold the mouse button, and drag the column to a new size.

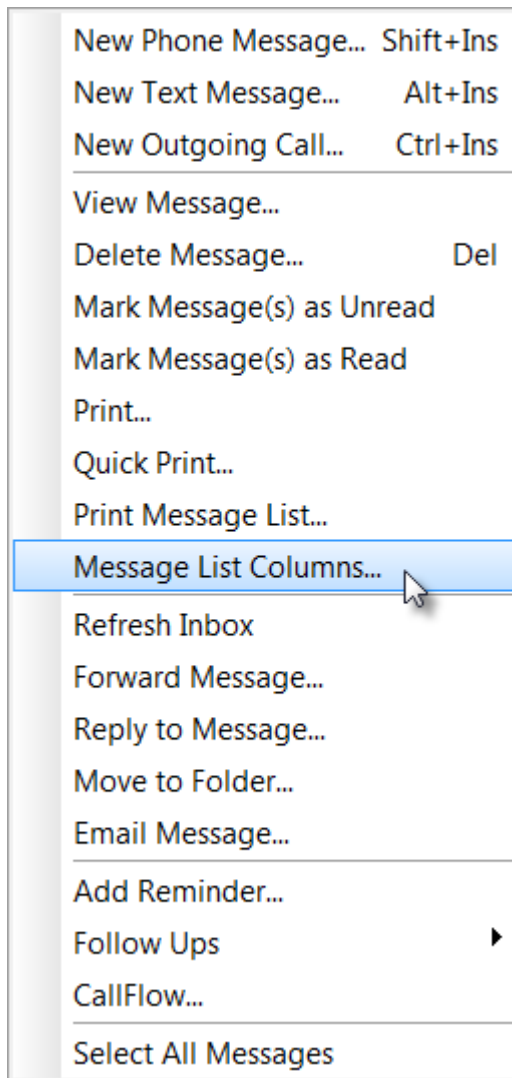
		ID	Date	Caller	Company
✉	📞	568	17/11/2015 2:24 pm	Adela Bender	Patton an
✉	📞	567	1/11/2015 9:09 am	Abby Hansen	Miranda C
✉	📞	566	19/10/2015 10:09 am	Test	Test
✉	📞	565	10/10/2015 9:50 am	Test	Test

PhonePad will remember the column widths between login sessions.

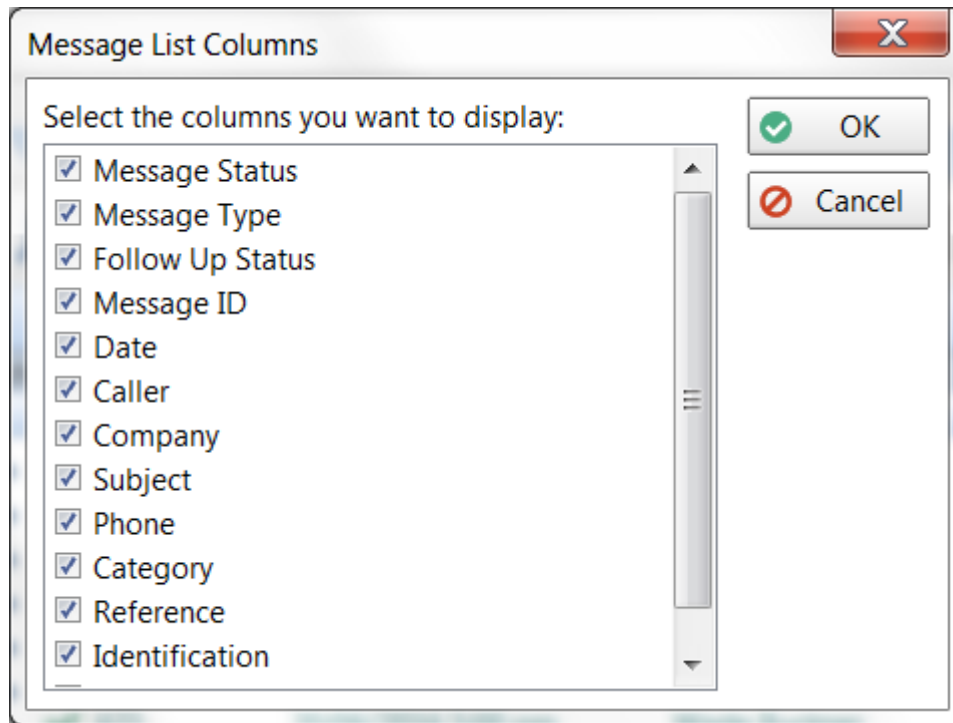
Selecting Which Columns to Display

If you don't want all columns displayed in the message lists, there is an option to change this.

Right-click on the Inbox message list and select **Message List Columns** from the popup menu.



The following window will be displayed:



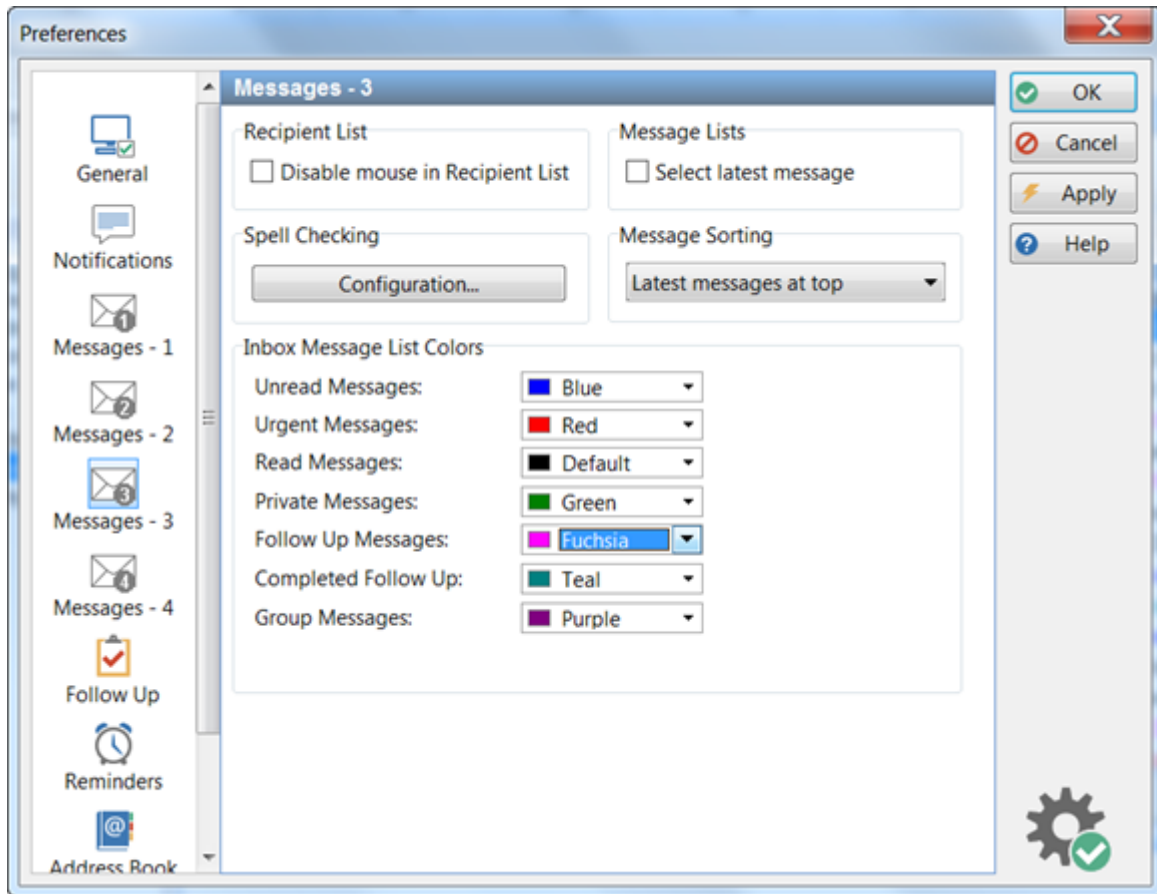
By checking or unchecking the various check boxes, you can select which columns you want displayed in the message lists. This affects all message lists.

Color Coding

Message lists also use color coding to identify the status of messages. These are the default colors:



BLUE	Unread message.
RED	Urgent message.
BLACK	Read message.
GREEN	Private message.
FUCHSIA	Message marked for Follow Up.
TEAL	Follow Up completed on the message.
PURPLE	Group message.

You can change the colors used by selecting **Preferences** from the **Tools** menu, then selecting **Messages-3**.

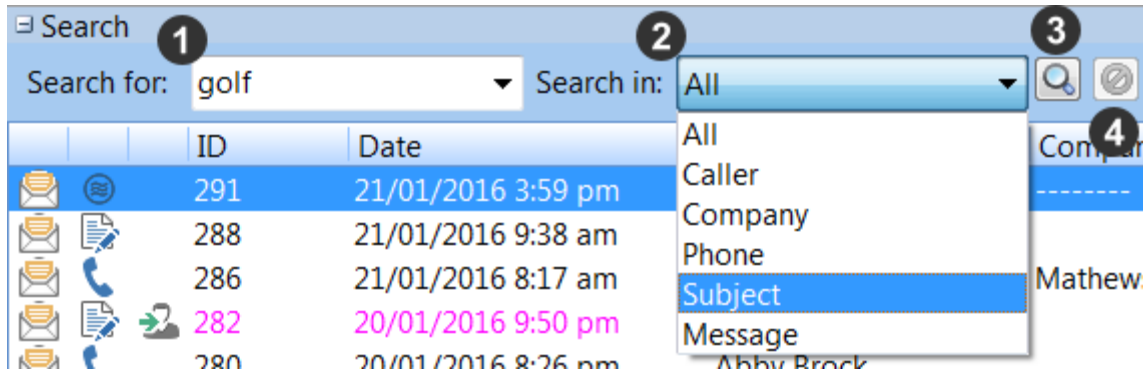


Search Bar

Each message list has a built-in search function, located at the top. Click the small + button to open the **Search Bar**.

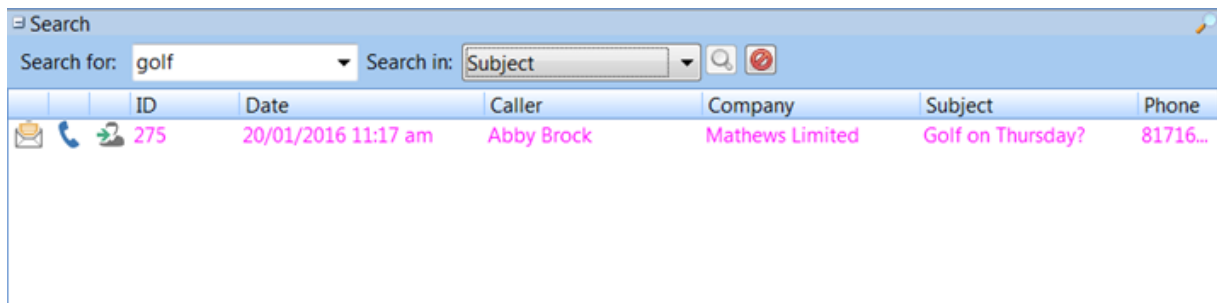
Search				
	ID	Date	Caller	
	291	21/01/2016 3:59 pm	-----	
	288	21/01/2016 9:38 am		

Once the Search Bar has been expanded you can enter the text you want to search for.




1. Enter your **Search Text**.
2. Select the field you want to search.
3. Click the **Search** button.
4. Click the **Cancel** button to cancel the search.

The message list will only display messages that match your search criteria.



To cancel the search just click the **Cancel** button. The message list will then show all messages again.

 The Search Bar only searches the messages in the current folder. If you want to search all messages then use the main Search option.

Information Panel

Below the Message List is an information panel, separated by a splitter. Every folder has a **Follow Up Notes** tab, except for the Inbox which has 3 tabs: Follow Up Notes, Caller Information and Preview.

Follow Up Notes

The **Follow Up Notes** tab shows all follow up notes for the selected message. This tab is always visible, unless you close the splitter.

Followup Notes			Caller Information			Preview		
Date	Notes					User		
28/09/2015 1:02 pm	Left another message.					Stev		
28/09/2015 9:37 am	Return Abby's call and left a voicemail message.					Stev		

Caller Information

Caller Information displays details about contact information for the selected message. It allows you to view all phone numbers for the caller without having to open the message or look them up in the Address Book.

Followup Notes			Caller Information			Preview		
Caller:		Abby Brock						
Company:		Mathews Limited						
Business Phone:		8171612			Home Phone:		8795641	
Business Alt Phone:		8171614			Home Alt Phone:			
Business Cell/Mobile:		8894563			Home Cell/Mobile:		8997412	
Business Fax:		Home Fax:						

This tab is shown/hidden by selecting **Caller Information** from the **View** menu.

Message Preview

Message View displays details about the selected message. It allows you to view most of the information without opening the message.

Followup Notes			Caller Information			Preview		
To:		steve				Date:		20/01/2016
						Time:		11:17 am
Caller:		Abby Brock				Phone:		8171612
Company:		Mathews Limited						
Subject:		Golf on Thursday?						
Message:		Abby rang to see if you are still up for a game of golf on Thurssday.						

This tab is shown/hidden by selecting **Message View** from the **View** menu.

Splitters

You may have noticed these little dividers between panes on the main window.

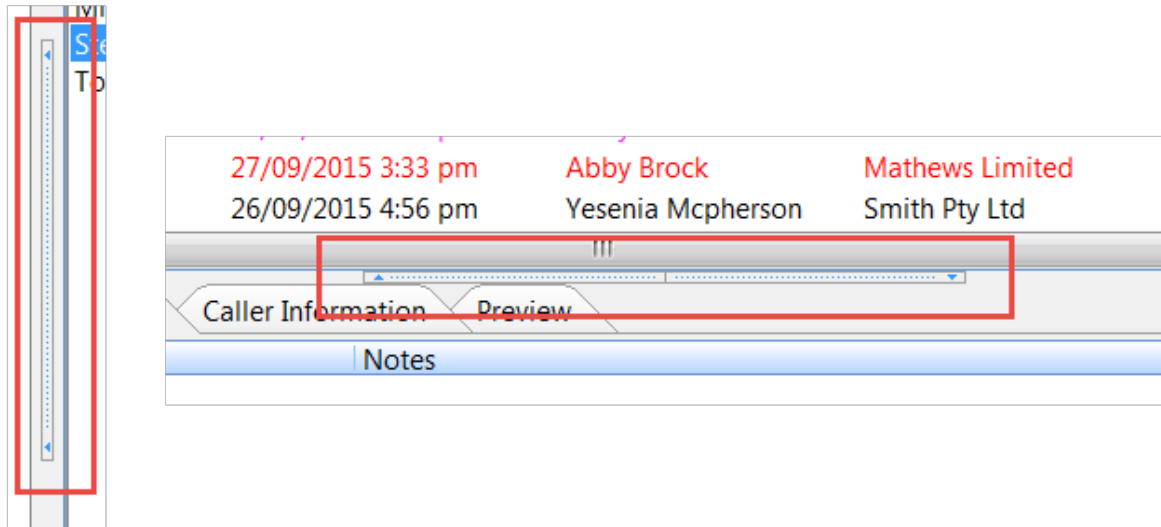


Image: Horizontal and Vertical splitters.

These are called "splitters" as they split the panes they are connected to. These splitters allow you to resize the pane you are viewing so that you can see them better. If you click on the bar with the arrows, it will open or close one of the panes.

If you position the mouse cursor outside of the bars you will see a double-arrowed cursor. By then clicking on the splitter you can resize either pane to your liking.

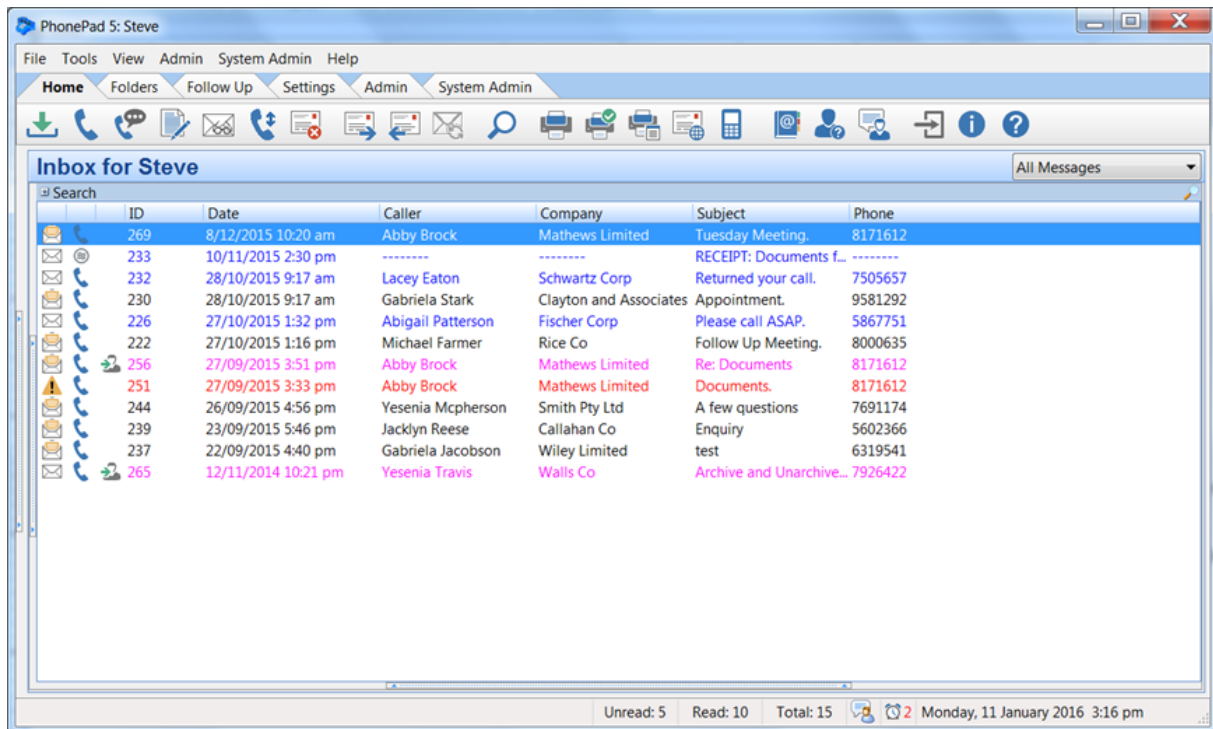


Image: All splitters closed.

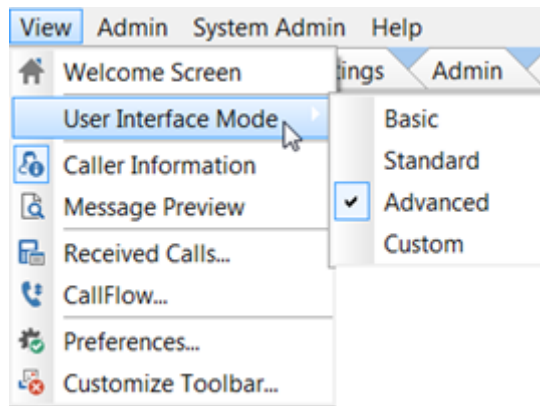
In this example you can see that all of the splitters have been closed, allowing the Inbox to fill up all of the available space.

User Interface Modes

PhonePad 5 can seem a little overwhelming with the many features and options available. To help ease into using PhonePad you can minimize the number of features available using *User Interface Modes*.

There are 3 modes available: *Basic*, *Standard* and *Advanced*. *Basic* and *Standard* show a subset of features, while *Advanced* (the default) shows all features.

You can set the mode by selecting **User Interface Modes** from the **View** menu, and then selecting the appropriate mode.

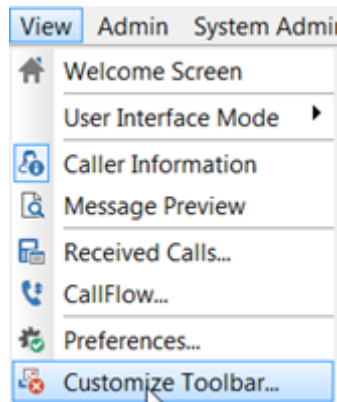


If you want more precise control over which buttons are shown on the toolbars, use the Toolbar Configuration feature. The *Custom* mode is used when you modify the toolbar configuration.

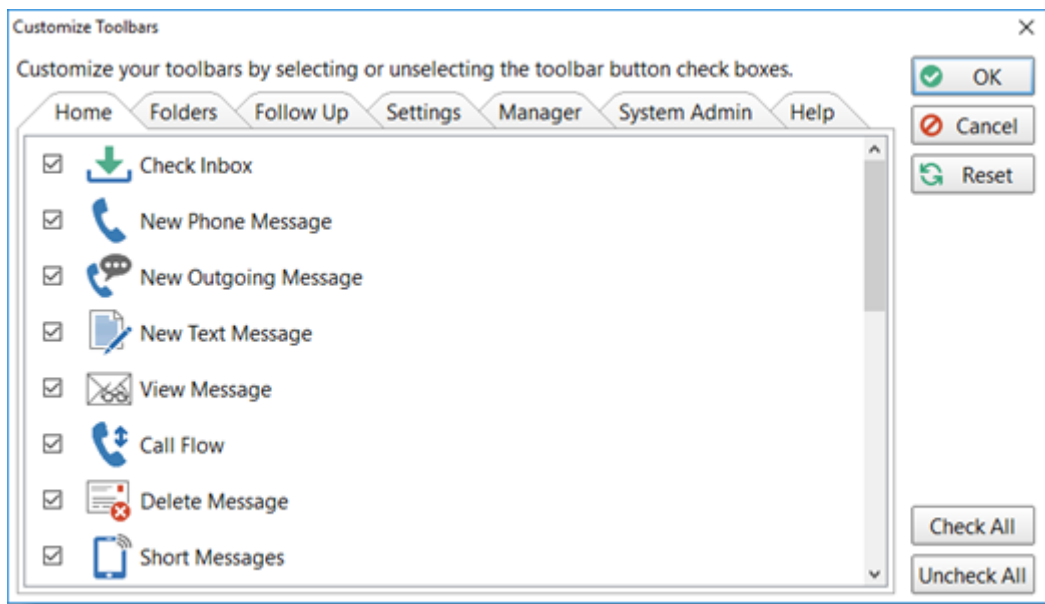
Configuring the Toolbars

If you don't use all of the features in PhonePad you can modify the toolbars so that only the buttons for the features you use are shown.

To do this, select **Customize Toolbar** from the **View** menu.



The **Customize Toolbar** window will appear.



Each of the toolbar tabs are shown (only administrators will see the admin tabs).

To hide a button from the toolbar just uncheck the check box next to it.

When you have made all the changes you want, click the **OK** button to save them.

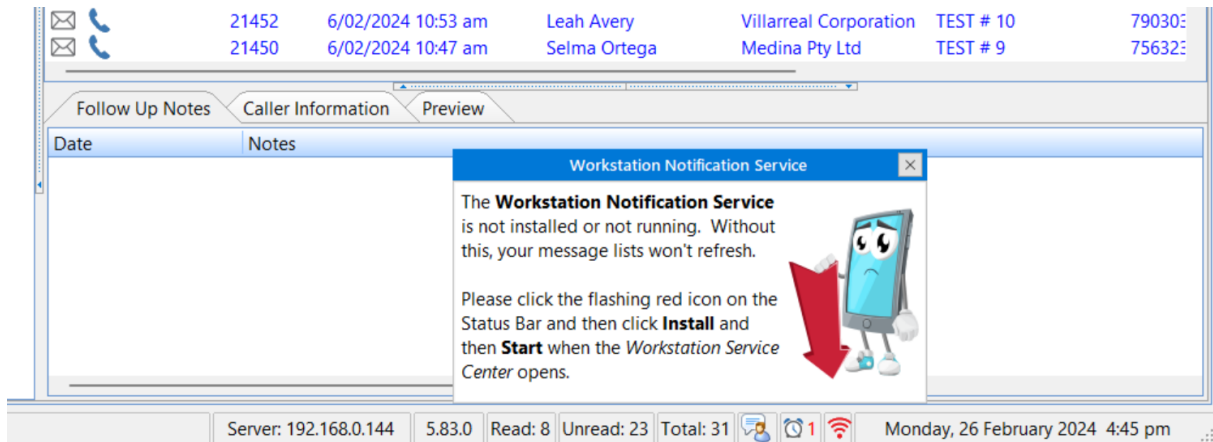
The **User Interface Mode** option on the **View** menu will be set to *Custom*. You can easily switch between showing all toolbar buttons or just the buttons you have set by selecting either *Advanced* or *Custom*.

System Administrators can also configure the toolbars for all users in System Rules.

Message Notification Service Error

During the installation process on a workstation, the **Message Notification Service** is also installed. This service is responsible for updating the Inbox and other folders, as well as lookup lists and other features.

If the service doesn't start automatically when installed, you will get this message when logging in to PhonePad.



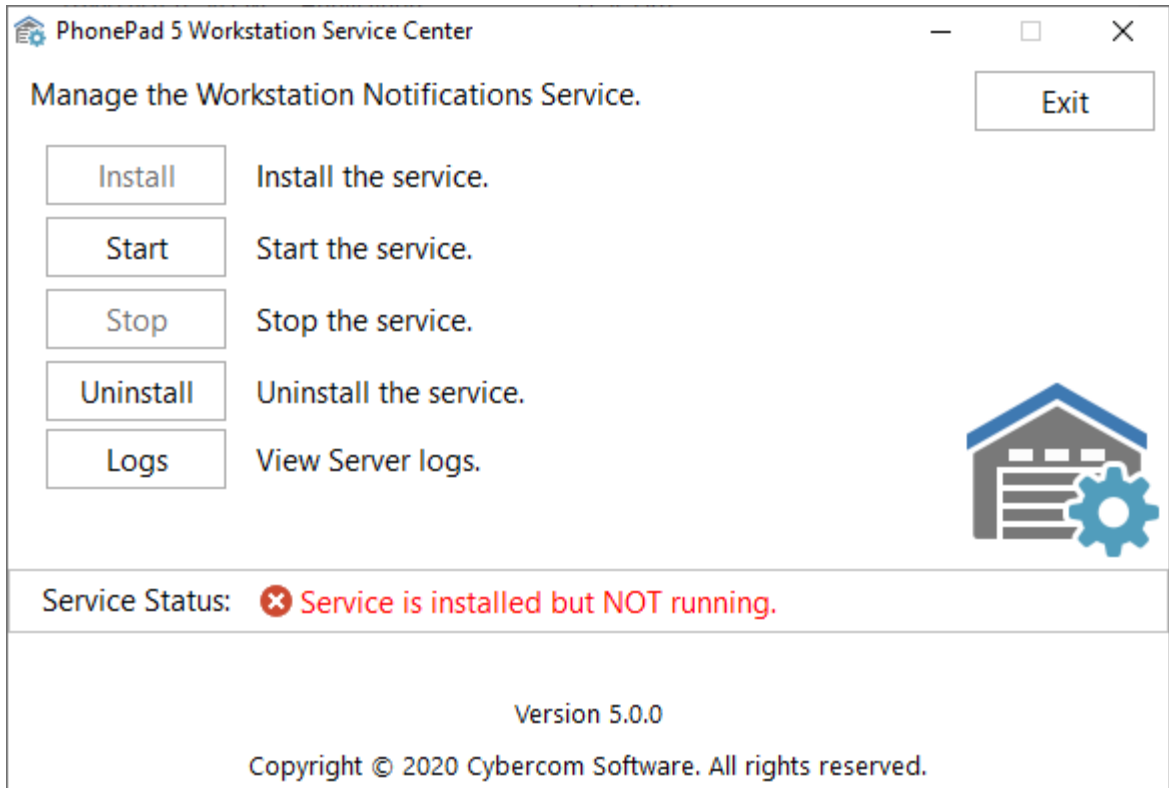
The **red** icon on the status bar the message is pointing to will be flashing, just in case the message didn't get your attention.

To fix this all you need to do is click on the flashing icon.

The **PhonePad Workstation Service Center** will then be displayed. If the Install button is enabled and the other buttons are disabled, it means that the installation process was unable to install the service for you.

Just click the **Install** button to install the service.

When the **Start** button is enabled, click on it and then click the **Exit** button



You should see the Notification Service icon in PhonePad's status bar is now **green**.

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Chapter

3

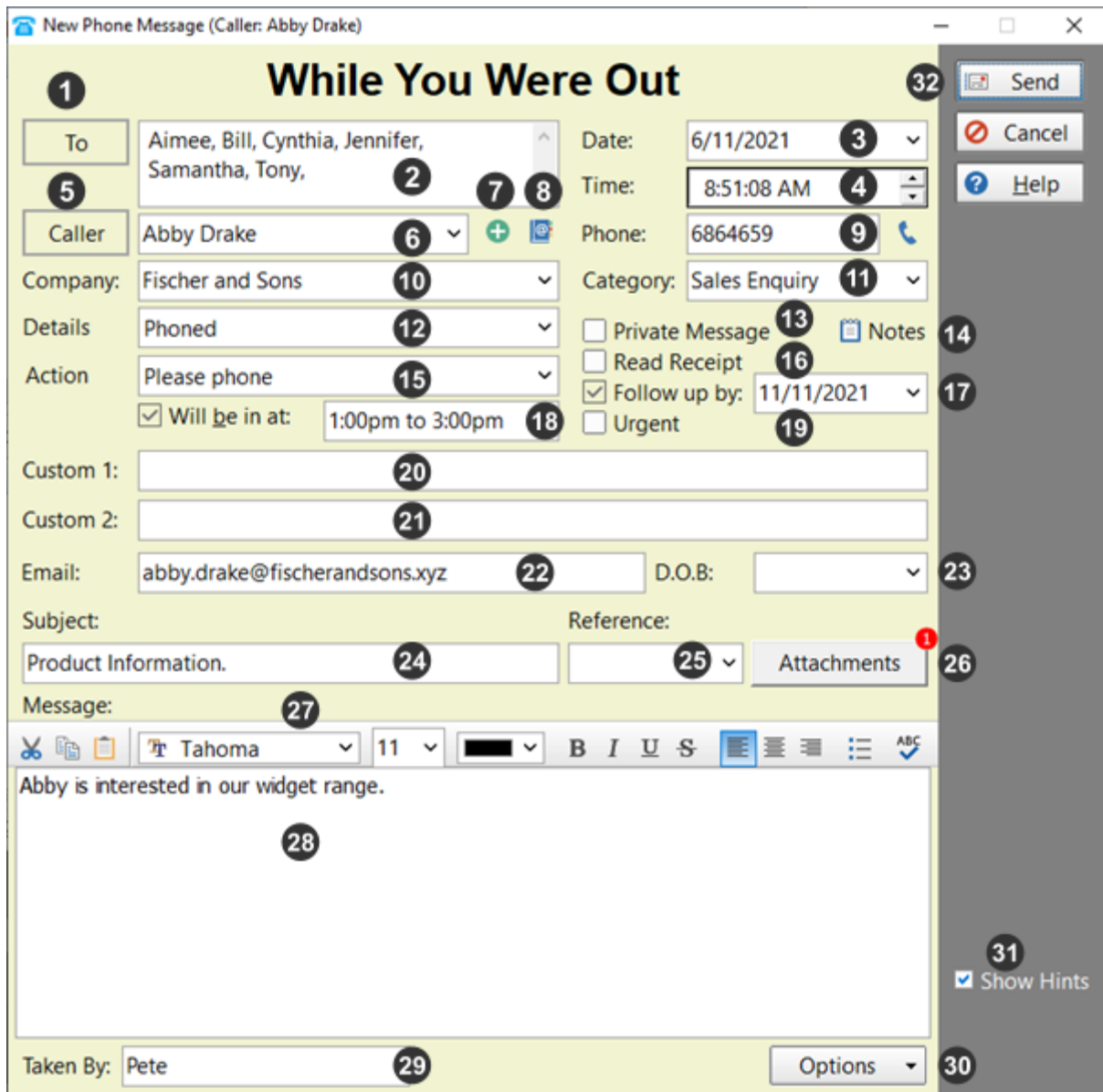
Messages

Messages

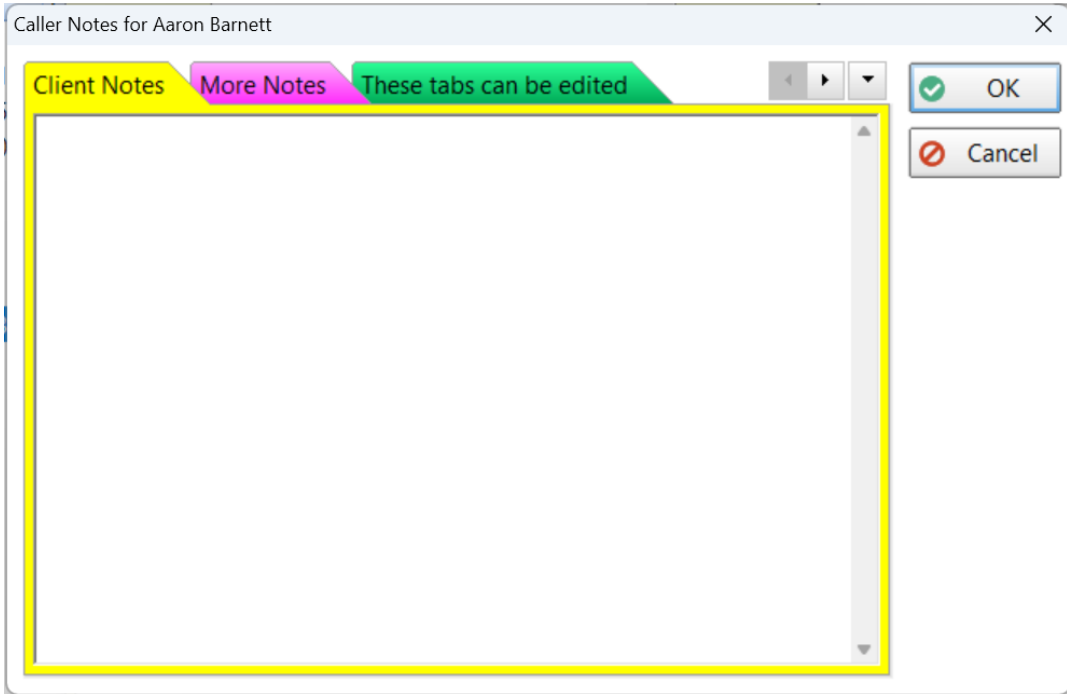
Phone messages is what PhonePad is all about. You can keep a record of all incoming and outgoing calls, as well as any follow up action performed. There are also text messages for intra-office communication.

Phone Messages (Incoming)

This message form is used to log details of incoming calls. Don't be intimidated by the number of fields. Although it may look a little complicated from this screenshot, it is actually quick and easy to use. And you don't need to complete all of the fields.



1	Click the TO button to display a list of all PhonePad users. Select the users you want the message sent to.
2	As an alternative to clicking the TO button, you can just type the user names in this field. It will automatically do an incremental search and find the user's name for you. Press <ENTER> to select a name.
3	The date field is automatically filled in for you but you can change it if needed.
4	The time field is automatically filled in for you but you can change it if needed.
5	Click the Caller button to look up the caller's details (if they are in the Address Book).

6	Type in the Caller's name. If they exist in the Address Book PhonePad will fill in the details for you.
7	Click the Add Caller button to enter additional details about a <i>new</i> caller.
8	Click the Address Book button to open the Address Book entry for an <i>existing</i> caller. This allows you to update any additional details.
9	<p>Enter the caller's phone number. If the caller already exists in the system then this will be pre-filled for you, but you can change it if the number is different.</p> <p>The small phone icon next to the phone number field lets you select from a number of phone numbers for the user.</p>
10	This is the company the caller is from. If the caller isn't from a company you can leave this blank.
11	You can assign this call to a Category (if your administrator has set them up).
12	Select an item from the drop-down list, eg. Phoned, Returned Your Call, and Came to See You. This list can be changed by Managers and Administrators.
13	If checked, any user who has access to your folders will not be able to read the content of the message unless they are one of the recipients.
14	<p>Click the Notes button to add notes about the caller.</p> <p>The Caller Notes window will be displayed. There are 10 tabs of notes that you can add. These will be stored in the Address Book entry for the Caller.</p> 

	As you can see, the names of the Notes tabs, and the colors of the tabs, can be changed to suit your needs (this is done by a System Administrator under System Rules).
15	Select an item from the drop-down list, eg. No Action Required, Please Phone, Will Phone Again, Will Drop By Again, Wants to See You. This list can be changed by Managers and Administrators.
16	If checked, you will receive a message when the recipient/s read the message.
17	If checked, a follow up deadline will be placed on the message - you can specify the follow up date.
18	Enter information on when the caller will be available.
19	If checked, the message will be marked as Urgent.
20	This field can either be an edit fields or a drop-down list. The name and the drop-down list contents can be changed by a Manager or Administrator. This field can be configured not to appear.
21	This field can either be an edit fields or a drop-down list. The name and the drop-down list contents can be changed by a Manager or Administrator. This field can be configured not to appear.
22	You can enter the caller's email address in this field. The email address will be added or updated for this caller in the Address Book. This field will not be visible if the Show Email Address check box is unchecked in the Label Editor.
23	You can enter the caller's Date of Birth in this field. The Date of Birth will be added or updated for this caller in the Address Book. This field will not be visible if the Show Date of Birth check box is unchecked in the Label Editor.
24	Subject of the message.
25	A free form text field that can also be used for other messages. When you enter text in this field, it can be accessed for other messages (by any user).
26	You can add attachments to messages. If there is an attachment, the number of attachments will be shown in a red circle (which is known as a "Badge").
27	Toolbar for the message text.
28	The message text is where you enter additional details of the call.
29	Your name will be entered here by PhonePad when you create a new message. This cannot be changed.

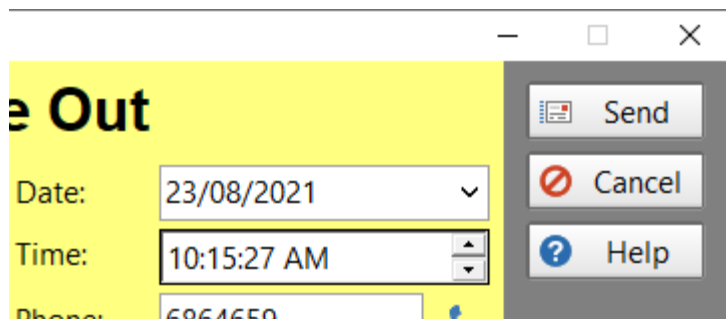
30	Click the Options button to add the following to message text: Date/Time Stamp, Insert Separator at Top, Insert Separator at Bottom.
31	When checked, some fields will display their keyboard shortcuts when the mouse hovers over them.
32	Click the Send button to send the message.

Logging an Incoming Call

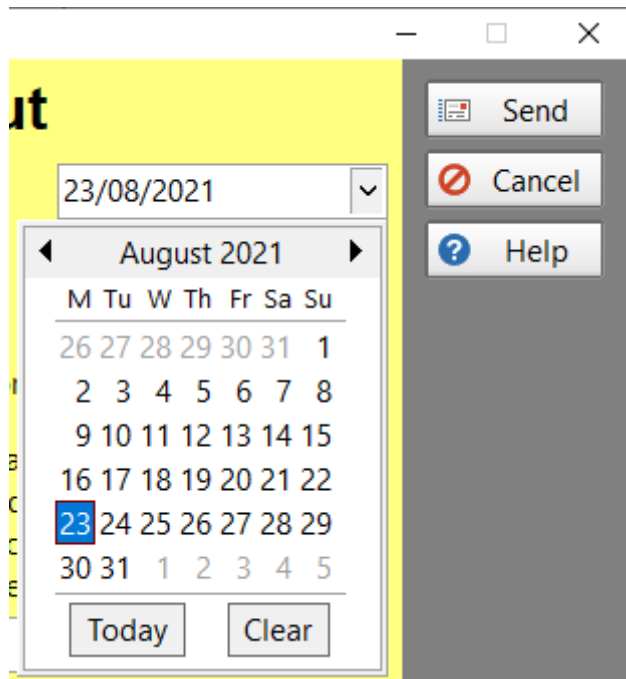
To log an incoming phone call, click the **New Phone Message** button on the toolbar, or select **New Phone Message** from the **File** menu, or press the <shift> <insert> keys on your keyboard.

Message Date and Time

PhonePad will automatically fill in the current date and time for you. You can change these if needed.



To change the date, you can either type it in or select it from the drop-down calendar.



You can edit the time directly, or you can use the up and down arrows keys on your keyboard to change the hour, minutes and am/pm. You can also use the up and down arrow buttons of the **Time** field.

Use the left and right arrow keys to move between hours, minutes and am/pm.

Recipients

The first step is to address the message to at least one person.

The fastest way to do this is to type in the **To** field.

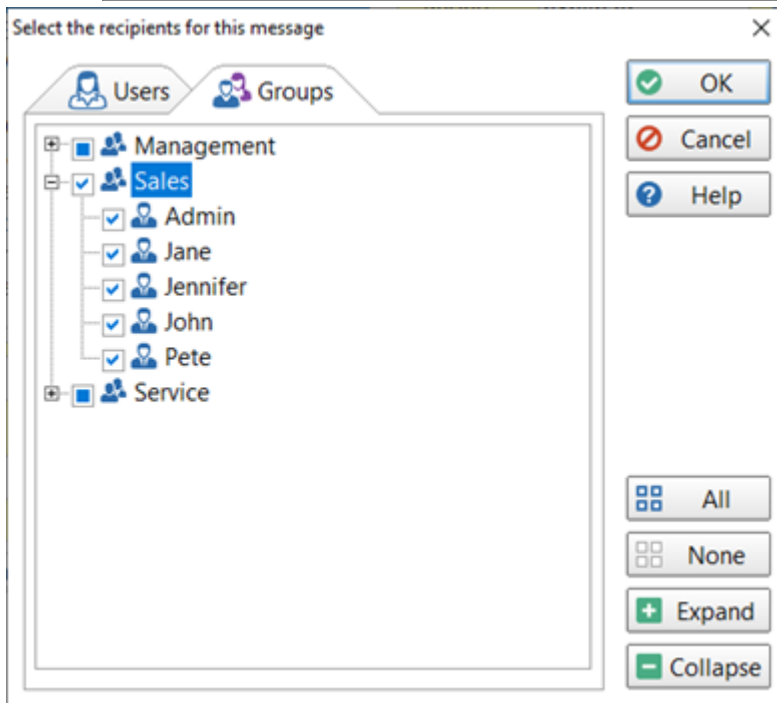
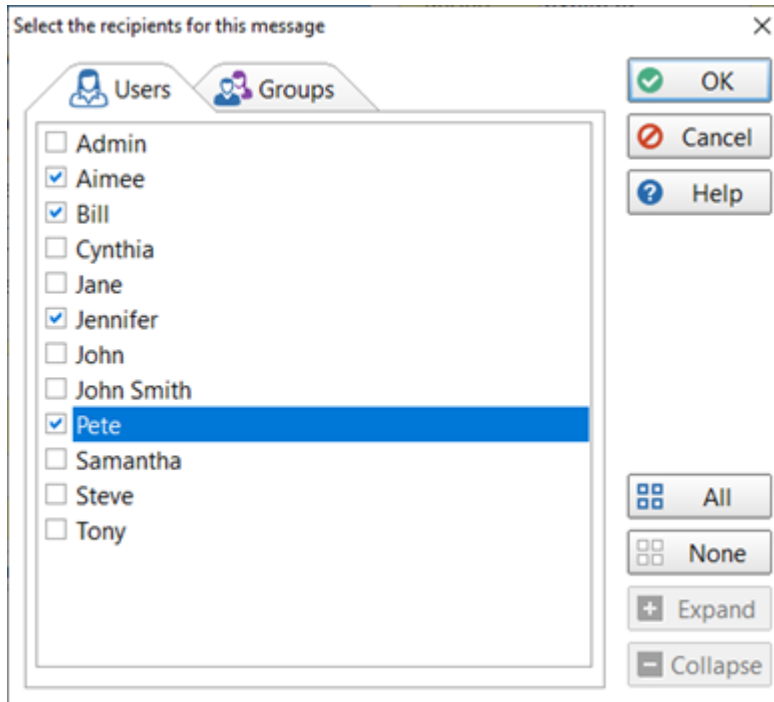
The screenshot shows a 'New Phone Message' window with a yellow header. The title is 'New Phone Message (Caller: Abby Drake)'. Below the header, the text 'While You Wer' is partially visible. The 'To' field contains the text 'ai'. A dropdown menu is open, showing a list of users and groups. The list includes: #MANAGEMENT, #SALES, #SERVICE, @Andy, @Bill Cook, @Dave, @Julie, @Test USER 12345678, Admin, Aimee (highlighted in blue), and Bill. The 'Caller' field is empty. The 'Company:' field is empty. The 'Details:' field is empty. The 'Action:' field is empty. The 'Custom 1:' field is empty. The 'Custom 2:' field is empty.

As you type in a name, PhonePad will drop down a list of users and perform an incremental search. Press **<enter>** to select a user. You can add additional users if you want.

Names beginning with a # are groups, eg. #Service. When you send a message to a group it will be sent to everyone in the group.

Names beginning with an @ are External Users, eg. @Aimee. When you send a message to an external user the message doesn't go into an Inbox but instead is placed on the message queue and is sent by email, SMS and/or Pushover.

You can also select names by clicking the **To** button. The **Users** tab allows you to select users while the **Groups** tab allows you to select groups. You can expand a group to see who the members are.



Caller's Name

Type the name of the caller in the **Caller** field. PhonePad will perform an incremental search to try to locate the caller's name.

New Phone Message (Caller: Abby Drake)

While You

To	Aimee,
Caller	Abby Drake
Company:	Abby Drake
Details:	Abby Farmer
Action:	Abby Hansen
Custom 1:	Abby Mcdowell
	Abby Mckinney
	Abby Mclaughlin
	Abby Padilla
	Abby Robbins

If the caller appears in the list, select their name and press the **<enter>** key. If the caller isn't in the list just type in their name and press the **<enter>** key.

You can also select a Caller by clicking on the **Caller** button. The **Caller Lookup** window will appear.

Caller Lookup

Search text: Fullname

Caller	Company	City	State	Phone
Abby Delaney	Mcdonald Pty Ltd			9884925
Abby Drake	Fischer and Sons			6864659
Abby Farmer	Walters Co			9312409
Abby Hansen	Miranda Company			5573188
Abby Mcdowell	Rich Corporation			9285957
Abby Mckinney	Stafford Corp			6614732
Abby Mclaughlin	McMahon and Associates			8153766
Abby Padilla	Crane LLC			8937445
Abby Robbins	Hull Corp			7128938

Caller: Abby Drake Company: Fischer and Sons

Address 1: Address 2:

City: State: Postal Code:

Country: Phone: 6864659

Alt. Phone: 6869606 Fax:

Cell/Mobile: 5556789 Email:

OK Cancel Help

Enter your **Search Text** and select the fields you want to search, then click the **Search** button.

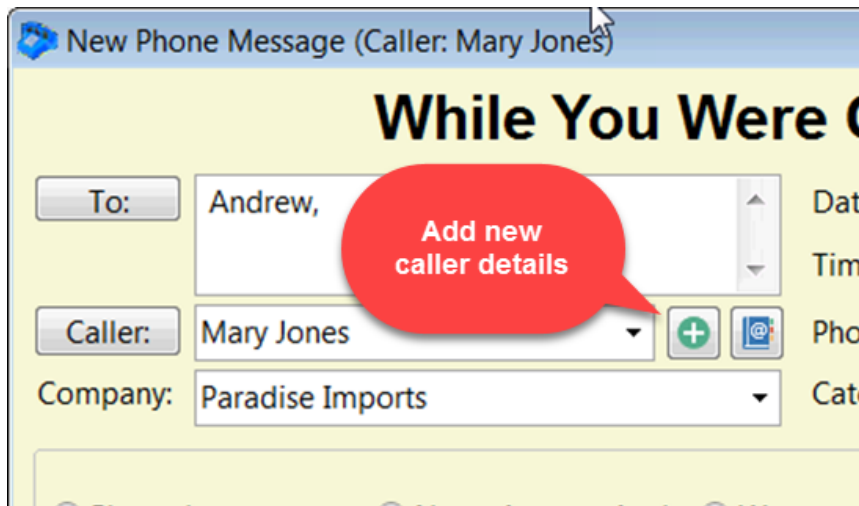
When you select a name from the list their details will appear below so you can verify it's the right person. Click **OK** to select the caller.

If you want to add a new caller, you can do this by either entering their name, company (if applicable) and phone number, or by clicking the **Add** button next to the **Caller** field.

Adding a New Caller with Additional Details

When you enter a new caller in a phone message a new entry will be added to the Address Book (providing you have this option set) with the caller's name, company and phone number(s).

There is another way to add a new caller but with extra information. Click the **Add** button next to the **Caller** field.



The **Add New Caller** window will be displayed.

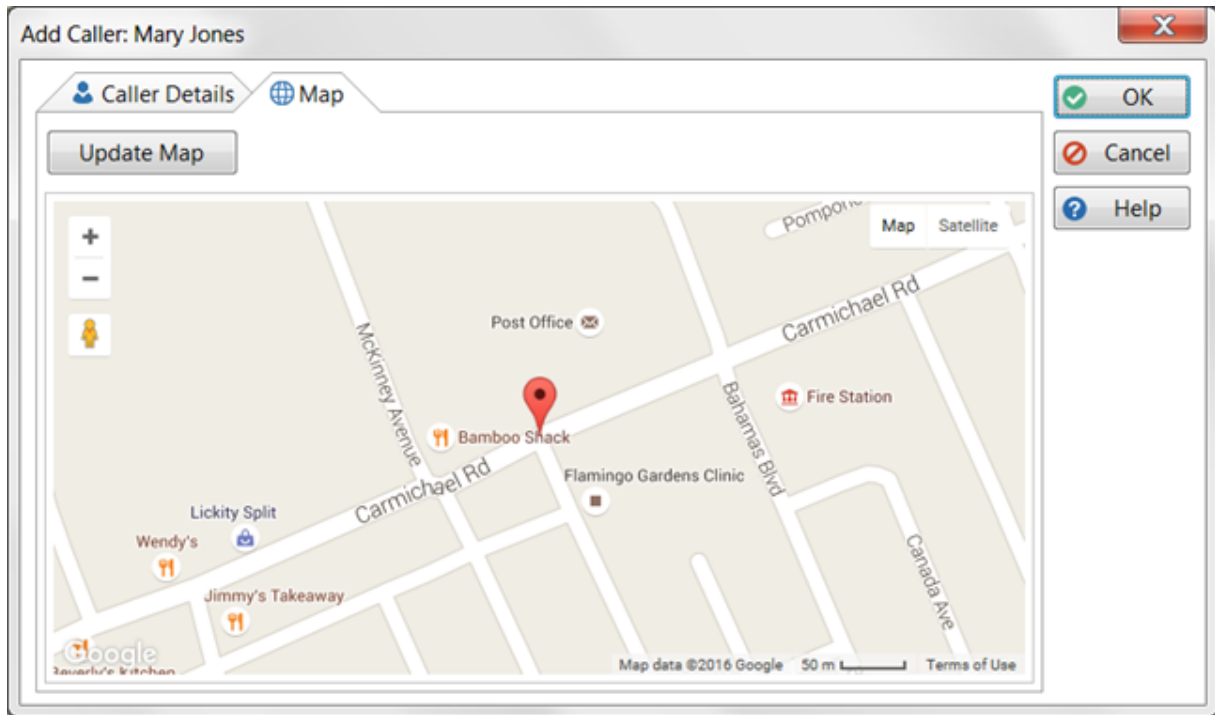
 A screenshot of a dialog box titled "Add Caller: Mary Jones". The dialog has a tabbed interface with "Caller Details" selected. It contains several input fields: "Firstname:" (Mary), "Lastname:" (Jones), "Company:" (Paradise Imports), "Address 1:" (Carmichael Road), "Address 2:" (empty), "City:" (Nassau), "State:" (empty), "Postal Code:" (empty), "Country:" (The Bahamas), and "Address Type:" (Business Address). On the right side, there are radio buttons for "Business Phone:" (selected, 123456), "Business Cell/Mobile:", "Home Phone:", and "Home Cell/Mobile:". At the bottom right, there are "OK", "Cancel", and "Help" buttons.

On this screen you can not only enter the name, company (if applicable) and phone number for the caller, you can also enter their address and other phone numbers.

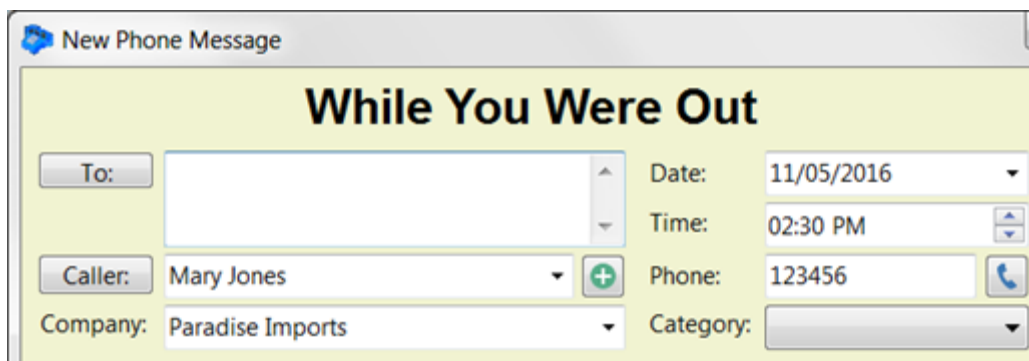
When you have entered the address, select the **Address Type** so PhonePad knows which fields to populate in the Address Book.

If you like, you can enter multiple phone numbers and then select the phone number type for the call.

If you click on the **Map** tab you can look up their address on Google Maps and then save it into the system.

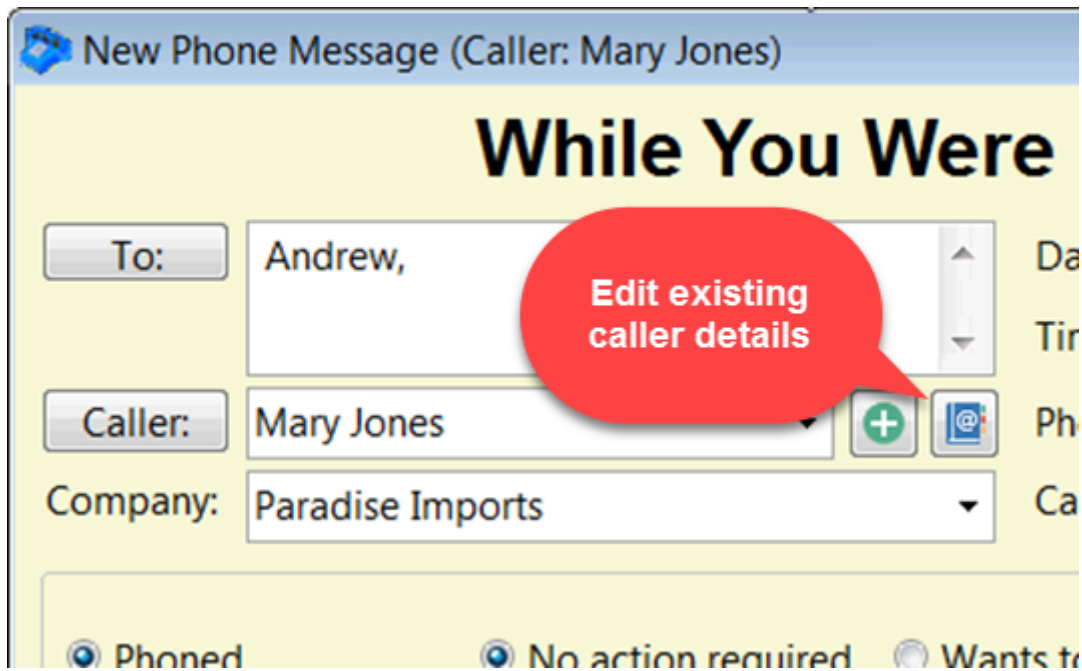


When you click the **OK** button, the details you entered will be added to the Address Book and the **Firstname, Lastname, Company** and selected phone number will be added to the message form.



Editing an Existing Caller

If the caller you are entering for the call already exists in your Address Book, you can click the **Address Book** button to open their details.



The **Update Entry** screen will be displayed.

Update Entry

Caller Information

Fullname: Mary Jones

Job Title:

Company: Paradise Imports

OK

Cancel

Print

Help

General Business Postal Home Map Family Notes

Title:

Firstname: Mary

Middlename:

Lastname: Jones

Date of Birth:

Age Now:

Identification: Client No, Patient No, etc.

Contact Type:

Load... Save... Clear...

Private Address Book Entry

Added by: Steve Updated by: Steve

Date: 11/05/2016 2:42:18 PM Date: 11/05/2016 2:42:18 PM

This allows you to update any information for the caller.

Phone Number

Enter the phone number in the Phone field. If the caller you selected is already in the system this field will be prefilled for you.

You Were Out

Date: 20/01/2016

Time: 08:57 AM

Phone: 8171612

Category: [Dropdown]

If you click the button with the telephone icon, you can select additional phone numbers if there are any.

You Were Out

Date: 23/08/2021

Time: 10:15:27 AM

Phone: 6864659

Category: [Dropdown]

Private

Read Re

Follow

Urgent

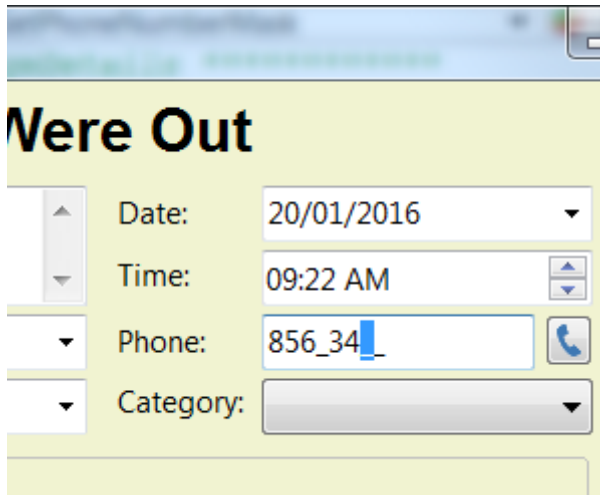
Send

Cancel

Help

Bus Phone	6864659
Bus Alt Phone	6869606
Bus Fax	
Bus Cell/Mobile	5556789
Home Phone	5559202
Home Alt Phone	5557932
Home Fax	
Home Cell/Mobile	5559034

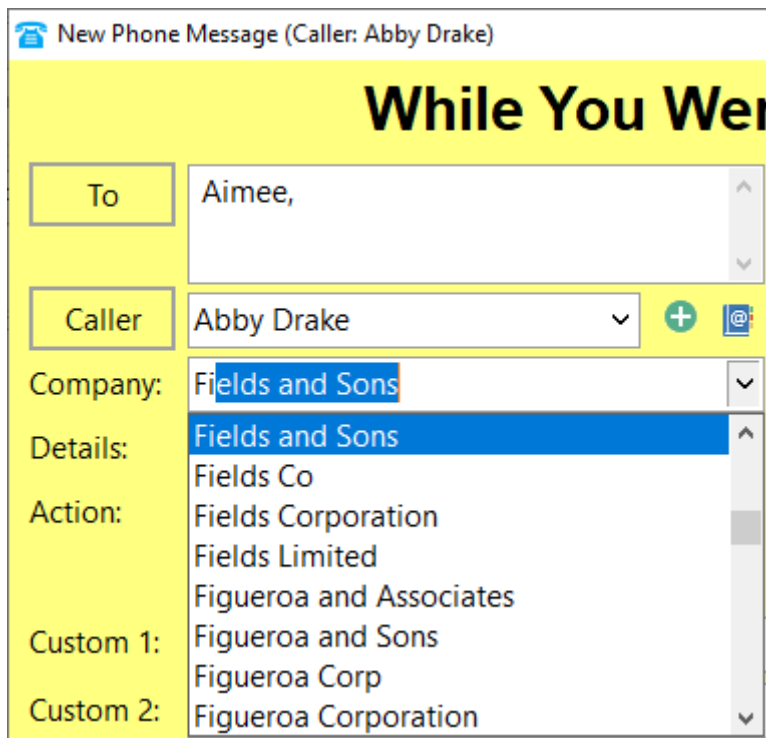
Normally the Phone field is a free-form text field, which means you can enter phone numbers in any format you like. However, if your PhonePad administrator has specified a phone number format for the Phone field then you will be restricted to that format.



Company

If the caller is from an organization you can select a **Company** from a list of companies known to PhonePad (via the Address Book). As you type in a name PhonePad will perform an incremental search, narrowing down the company names to match what you type in. Press the <enter> key to select a company.

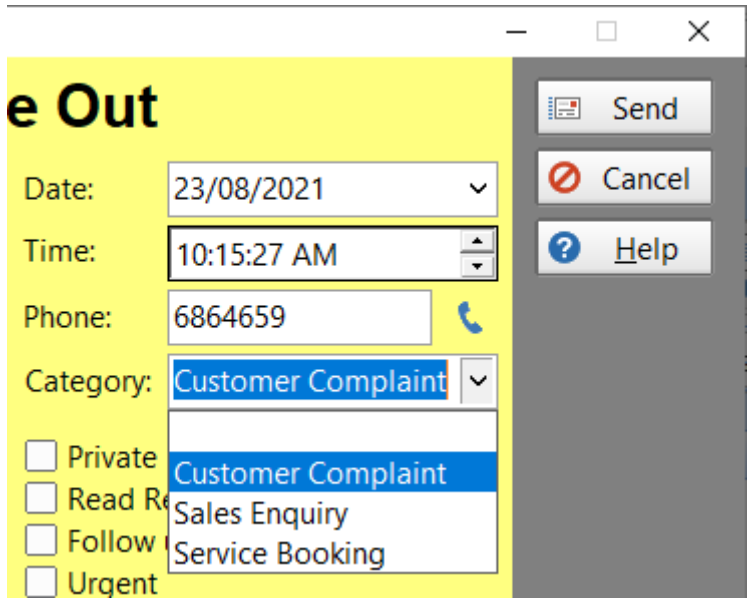
If the name doesn't exist you can just type it in.



If the caller has called before then the Company name will be automatically filled in for you, however, you can change it if required.

Category

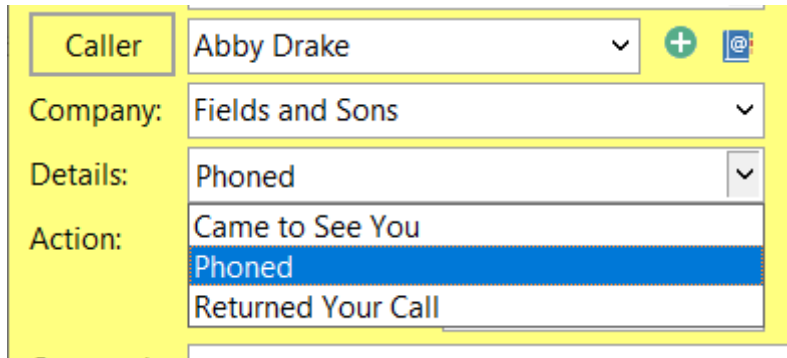
If your PhonePad administrator has created some categories, you can select a Category from the drop-down list.



Message Details

Here is where you add some details about the call.

The first thing to select is information about the call. This is called **Details**. The default details are shown in the example below. Your list may look different if a Manager or Administrator has changed the list.



Next, select the required action. This is called **Action**. The default actions are shown in the example below. Your list may look different if a Manager or Administrator has changed the list.

Caller	Abby Drake	+ @
Company:	Fields and Sons	
Details:	Phoned	
Action:	Please phone	
	No Action Required	
	Please phone	
Custom 1:	Wants to see you	
Custom 2:	Will drop by again	
	Will phone again	

The Will be in at option allows you to add some free-form text below it, eg. what time the Caller will be available.

And finally, there are some options you can select.

Details:	Phoned	<input type="checkbox"/> Private Message
Action:	Please phone	<input type="checkbox"/> Read Receipt
<input checked="" type="checkbox"/> Will be in at:	After 2:00pm	<input checked="" type="checkbox"/> Follow up by: 29/08/2021
		<input type="checkbox"/> Urgent

Private	When checked, only the recipients and sender of the message can view it. Anyone else who has access to your Inbox and folders will not be able to read the message unless they are also a recipient.
Read Receipt	When checked, you will receive a receipt message when a recipient has read the message.
Follow Up By	Check this check box if you want the message followed up by a specific date. You also need to select the follow up date. A reminder will be created for this message.
Urgent	When checked the message will be marked as Urgent.

Subject

The **Subject** is the subject of the phone call, although you can enter whatever you like in this field. .



Subject: Golf on Thursday?

Reference: [Empty]

Message:

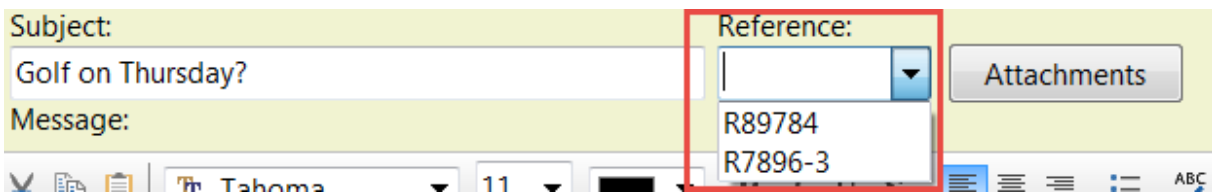
Attachments

This field may be prefixed with some text that has been set up by your PhonePad administrator.

Reference

The Reference field is a free-form text field that can contain whatever text you want. Its purpose is to make the text available for future messages. When you enter text in this field, PhonePad will remember it so that the next time you create an incoming or outgoing phone message you can select the text from the drop-down list.

The text in the drop-down list is available for *all* users to access.



Subject: Golf on Thursday?

Reference: [Dropdown menu with options: R89784, R7896-3]

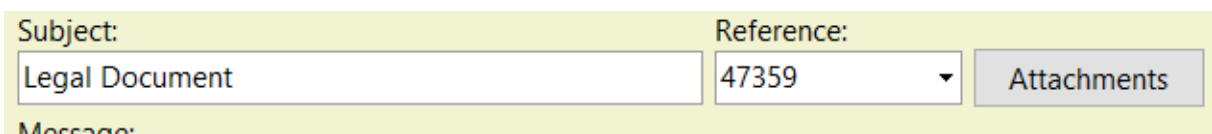
Message:

Attachments

Possible uses for this field are: patient numbers, client numbers, file numbers and so on.

Attachments

You can attach up to 5 attachments to each message.



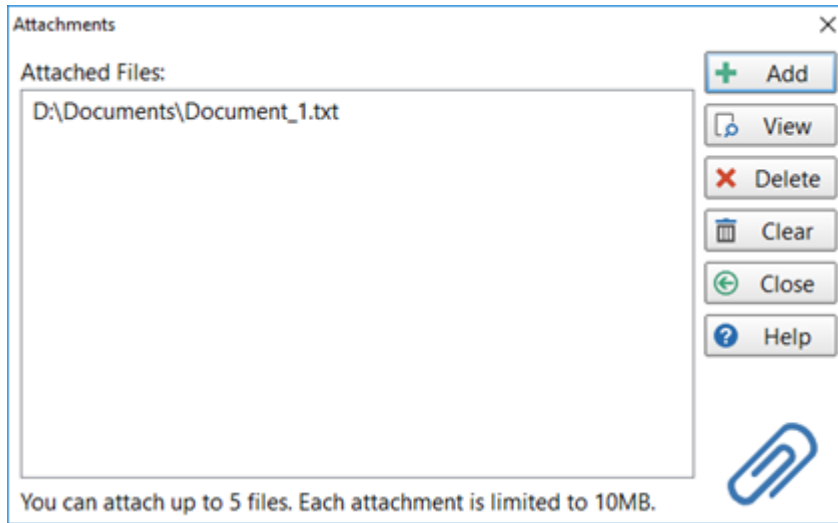
Subject: Legal Document

Reference: 47359

Message:

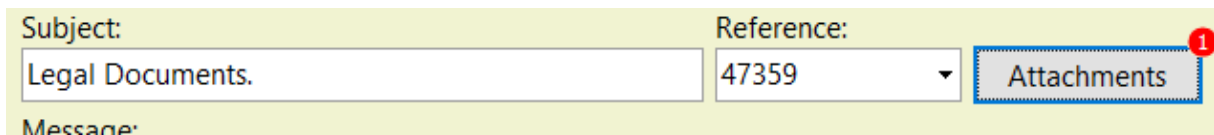
Attachments

Click the **Attachments** button.



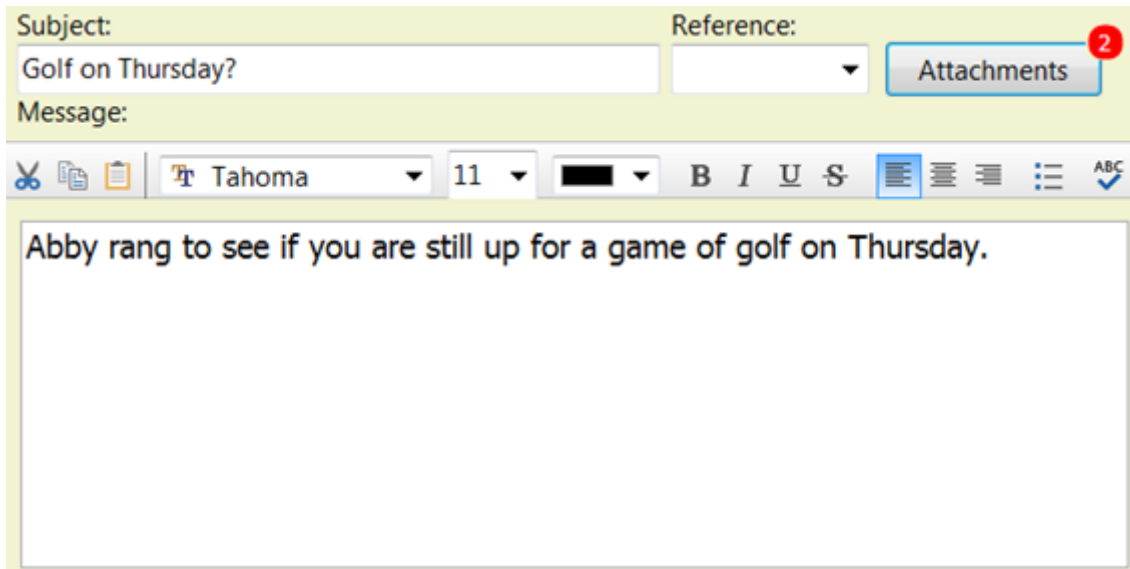
Add	Add an attachment. You can add up to 5.
View	View the selected attachment.
Delete	Delete the selected attachment.
Clear	Delete all attachments.
Close	Close the Attachments window.
Help	Display online help.

If you have added any attachments, the number of attachments will be displayed on the **Attachments** button (the red circle is known as a "Badge").

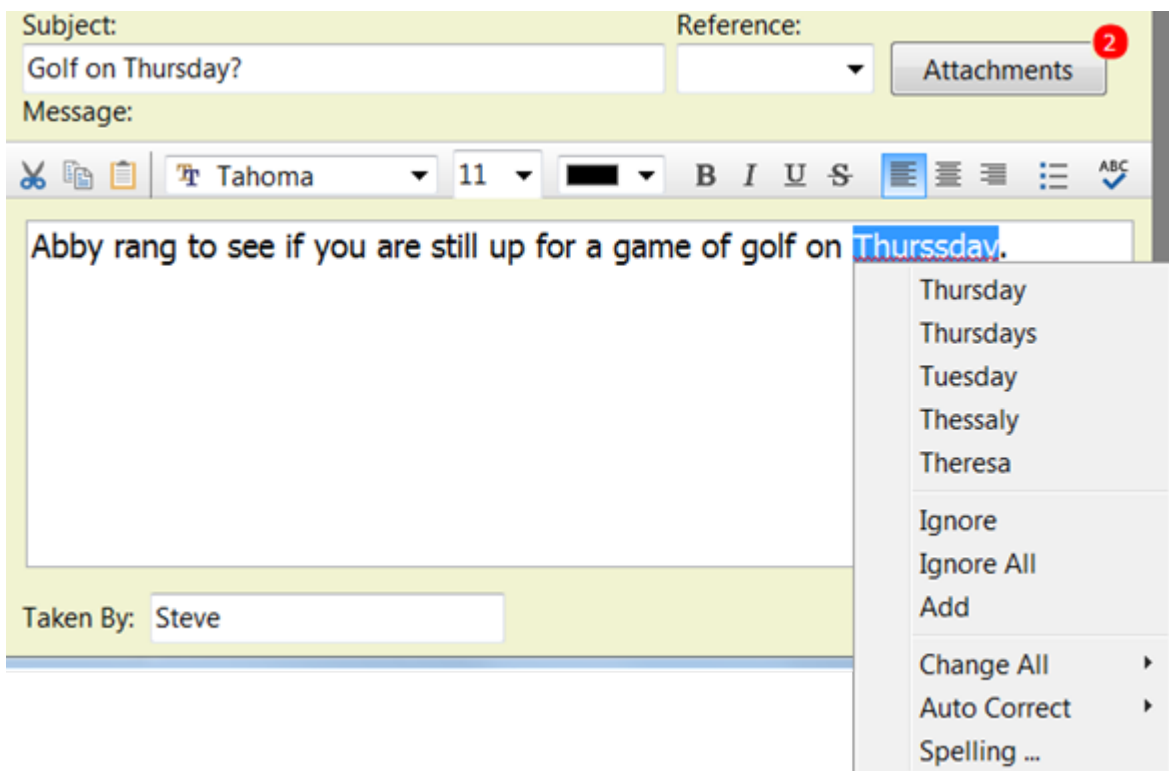


Message Text

The **Message** field is where you can enter additional information.



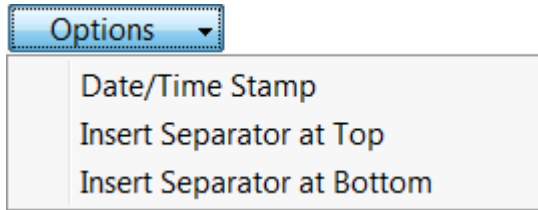
This field has its own toolbar so that you can customize the appearance of the text you enter. The usual buttons are there such as Cut, Copy and Paste, as well as buttons to manipulate the font.



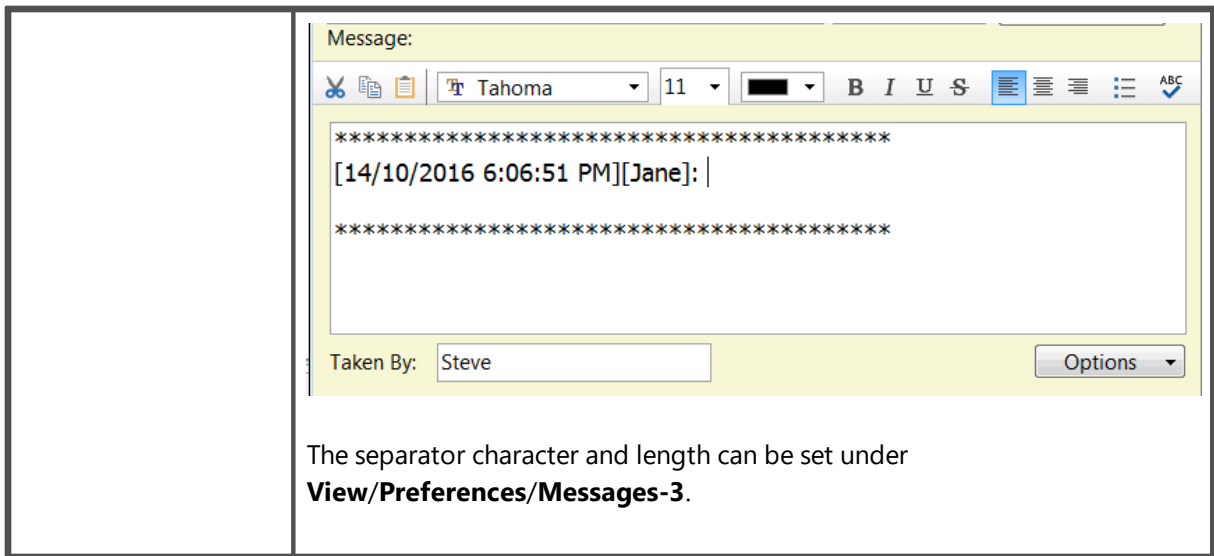
There is also a spell checker to check your spelling. You can either click the Spell Check button on the message toolbar, or you can use Live Spell Check (you will see red squiggly lines under words that may be mis-spelt).

Options Button

The **Options** button at the bottom of the phone message form has 3 options.



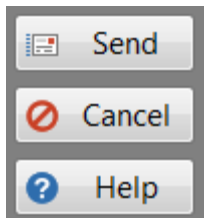
<p>Date/Time Stamp</p>	<p>Inserts a Date and Time stamp with the logged in user's name.</p> <p>The screenshot shows a message form with a toolbar and a text area. The text area contains the timestamp and name: "[14/10/2016 5:59:17 PM][Jane]: ". Below the text area is a "Taken By:" field with "Steve" entered and an "Options" button.</p>
<p>Insert Separator at Top</p>	<p>Inserts a line above the current line.</p> <p>The screenshot shows a message form with a toolbar and a text area. The text area contains a line of asterisks followed by the timestamp and name: "*****[14/10/2016 6:06:51 PM][Jane]:". Below the text area is a "Taken By:" field with "Steve" entered and an "Options" button.</p> <p>The separator character and length can be set under View/Preferences/Messages-3.</p>
<p>Insert Separator at Bottom</p>	<p>Inserts a line below the current line.</p>



The separator character and length can be set under **View/Preferences/Messages-3**.

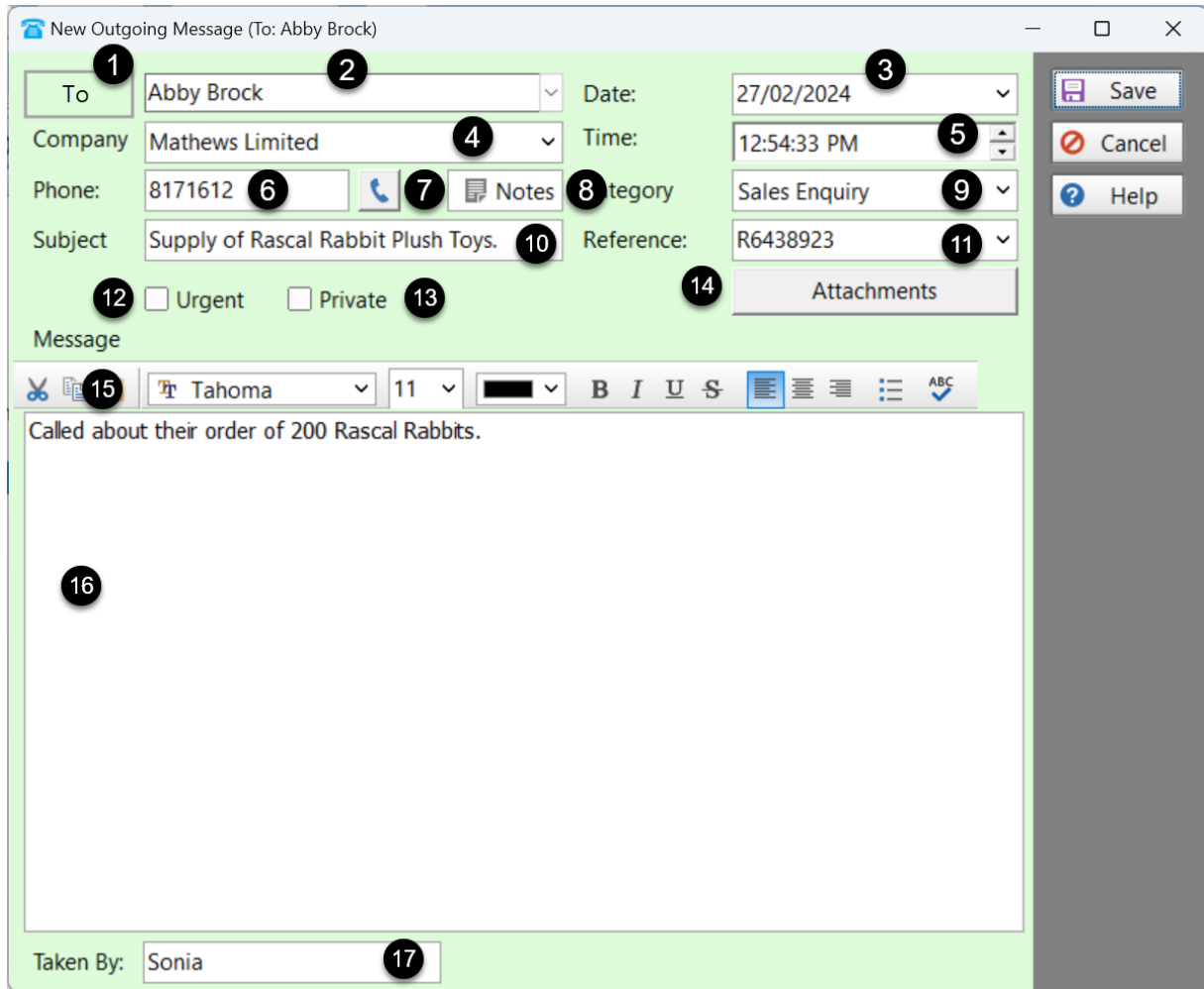
Sending the Message

All that's left to do is click the **Send** button.



Phone Messages (Outgoing)

This message form is used to log details of outgoing calls. Whenever you call someone, you can enter the details of the call in an outgoing message.



1	Click the To button to look up the details for the person you are calling (if they are in the Address Book).
2	Type in the person's name. If they exist in the Address Book PhonePad will fill in the details for you.
3	The date field is automatically filled in for you but you can change it if needed.
4	This is the company the person is from. If the person isn't from a company you can leave this blank.
5	The time field is automatically filled in for you but you can change it if needed.
6	Enter the person's phone number. If the person already exists in the system then this will be pre-filled for you, but you can change it if the number is different.
7	You can click this button to select other phone numbers for this person.

8	View or add notes for this person.
9	You can assign this call to a Category (if your administrator has set them up).
10	Subject of the message.
11	A free form text field that can also be used for other messages. When you enter text in this field, it can be accessed for other messages (by any user).
12	If checked, the message will be marked as Urgent.
13	If checked, any user who has access to your folders will not be able to read the content of the message.
14	You can add attachments to messages. If there is an attachment, the number of attachments will be shown in a red circle (which is known as a "Badge").
15	Toolbar for the message text.
16	The message text is where you enter additional details of the call.
17	Your name will be entered here by PhonePad when you create a new message. This cannot be changed.

Logging an Outgoing Call

To log an outgoing phone call, click the **New Outgoing Call** button on the toolbar, or select **New Outgoing Call** from the **File** menu, or press the **<ctrl> <insert>** keys on your keyboard.

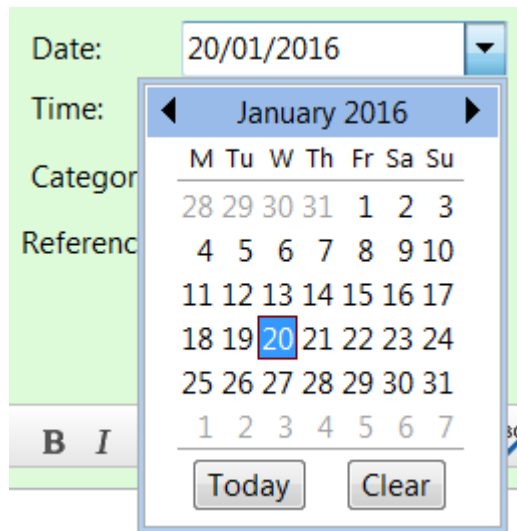
Message Date and Time

PhonePad will automatically fill in the current date and time for you. You can change these if needed.

The screenshot shows a portion of the PhonePad interface with a light green background. It contains four fields, each with a label and a value, and a small downward arrow on the right side of each field:

- Date:** 20/01/2016
- Time:** 11:59 AM
- Category:** Another Category
- Reference:** R89784

To change the date, you can either type it in or select it from the drop-down calendar.

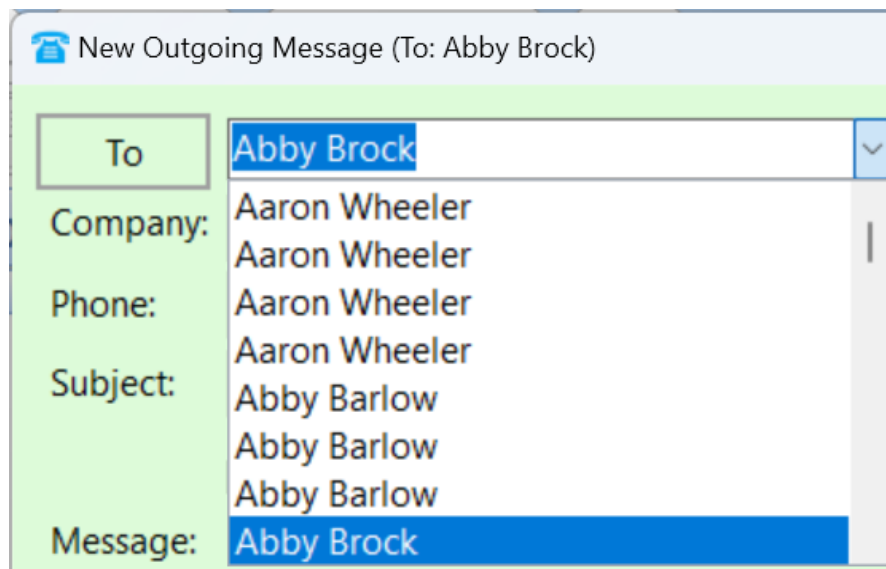


To edit the time, use the up and down arrows keys on your keyboard to change the hour, minutes and am/pm. You can also use the up and down arrow buttons in the **Time** field.

Use the left and right arrow keys to move between hours, minutes and am/pm.

Recipients Name

Type the name of the caller in the **To** field. PhonePad will perform an incremental search to try to locate the caller's name.



If the recipient appears in the list, select their name and press the **<enter>** key. If the recipient isn't in the list just type in their name and press the **<enter>** key.

You can also select a recipient by clicking on the **To** button. The **To Lookup** window will appear.

Recipient Lookup

Search text: abby Fullname Search

To	Company	City	State	Phone
Abby Barlow	Snyder and Sons			8821351
Abby Brock	Mathews Limited			8171612
Abby Brooks	Skinner Inc			6432363
Abby Delaney	Mcdonald Pty Ltd			9884925

OK Cancel Help

To Abby Brock **Company:** Mathews Limited

Address 1: **Address 2:**

City: **State:** **Postal Code:**

Country: **Phone:** 8171612

Alt. Phone: **Fax:**

Cell/Mobile: **Email:**

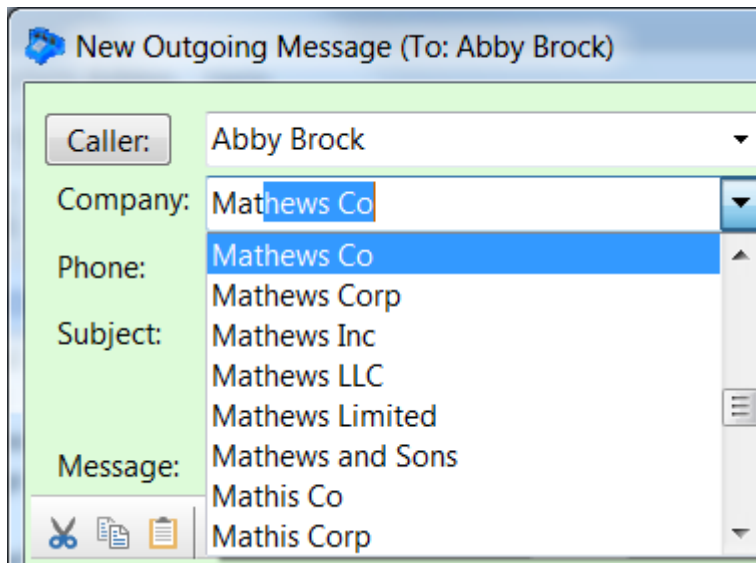
Enter your **Search Text** and select the fields you want to search, then click the **Search** button.

When you select a name from the list their details will appear below so you can verify its the right person. Click **OK** to select the caller.

Company

If the caller is from an organization you can select a **Company** from a list of companies known to PhonePad (via the Address Book). As you type in a name PhonePad will perform an incremental search, narrowing down the company names to match what you type in. Press the <enter> key to select a company.

If the name doesn't exist you can just type it in.



New Outgoing Message (To: Abby Brock)

Caller: Abby Brock

Company: Mathews Co

Phone: Mathews Co

Subject: Mathews Corp

Message: Mathews Inc

Mathews LLC

Mathews Limited

Mathews and Sons

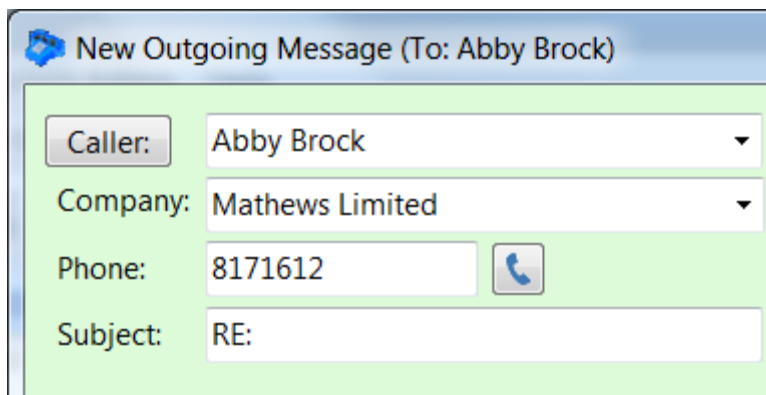
Mathis Co

Mathis Corp

If the caller has called before then the Company name will be automatically filled in for you, however, you can change it if required.

Phone Number

Enter the phone number in the **Phone** field. If the caller you selected is already in the system this field will be pre-filled for you.



New Outgoing Message (To: Abby Brock)

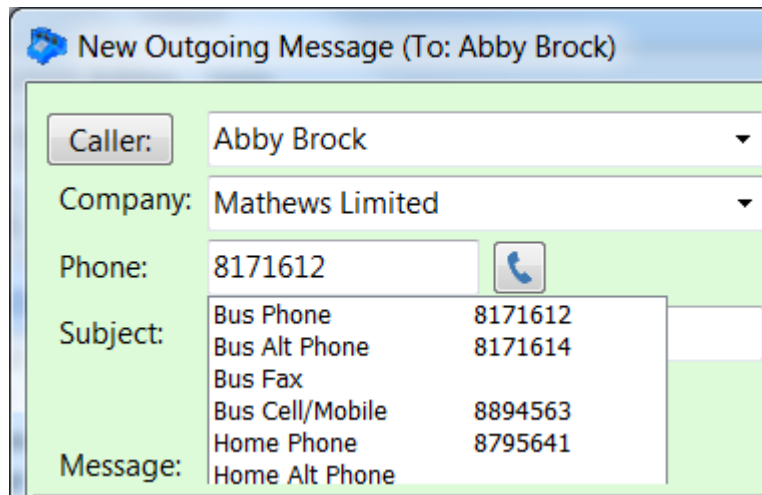
Caller: Abby Brock

Company: Mathews Limited

Phone: 8171612

Subject: RE:

If you click the button with the telephone icon, you can select additional phone numbers if there are any.



New Outgoing Message (To: Abby Brock)

Caller: Abby Brock

Company: Mathews Limited

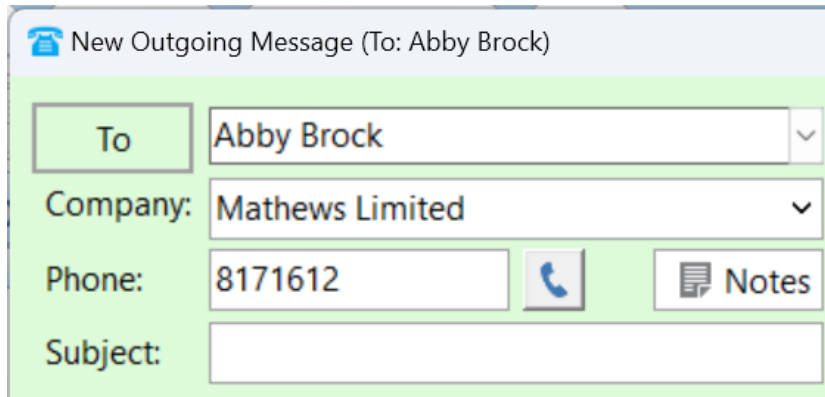
Phone: 8171612

Subject: Bus Phone 8171612
Bus Alt Phone 8171614
Bus Fax
Bus Cell/Mobile 8894563
Home Phone 8795641
Home Alt Phone

Normally the **Phone** field is a free-form text field, which means you can enter phone numbers in any format you like. However, if your PhonePad administrator has specified a phone number format for the Phone field then you will be restricted to that format.

Notes

You can optionally enter Notes for this person.



New Outgoing Message (To: Abby Brock)

To: Abby Brock

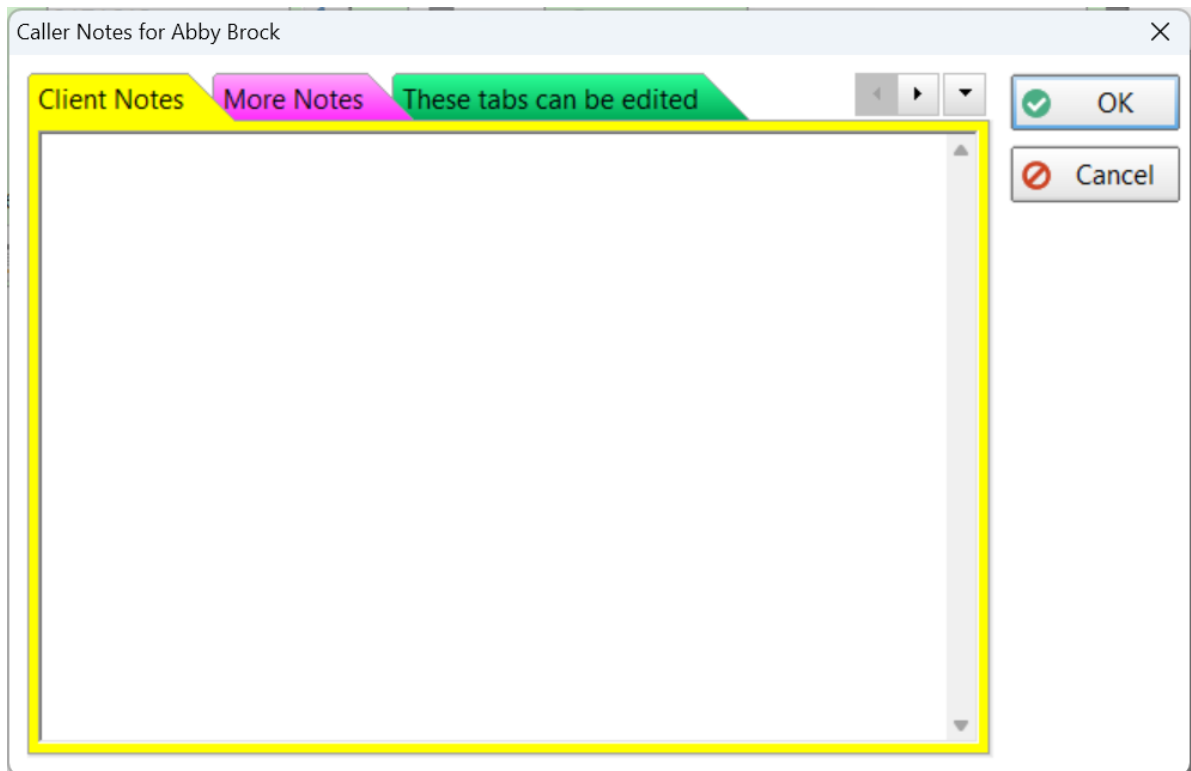
Company: Mathews Limited

Phone: 8171612

Notes

Subject:

Just click the **Notes** button. If there are any notes for the recipient they will be displayed. You can also add notes from this screen.

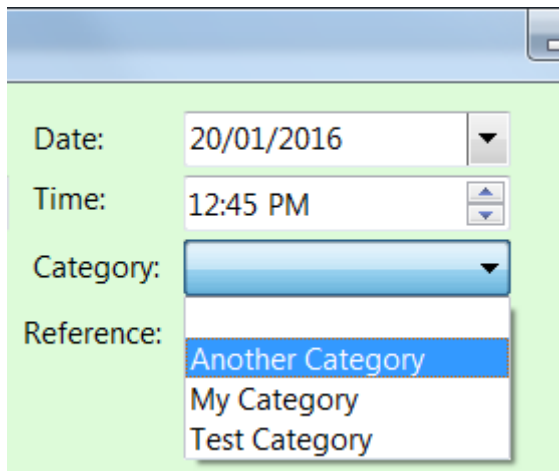


This is the same window that is display for Caller Notes when taking a incoming phone call. The notes are stored in the Address Book for the recipient.

There are 10 tabs available for notes. The names and colors of the tabs can be changed under **System Rules** by System Administrators.

Category

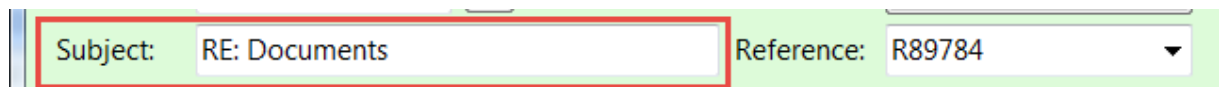
If your PhonePad administrator has created some categories, you can select a **Category** from the drop-down list.



Date: 20/01/2016
Time: 12:45 PM
Category:
Reference:
Another Category
My Category
Test Category

Subject

The **Subject** is the subject of the phone call, although you can enter whatever you like in this field. .



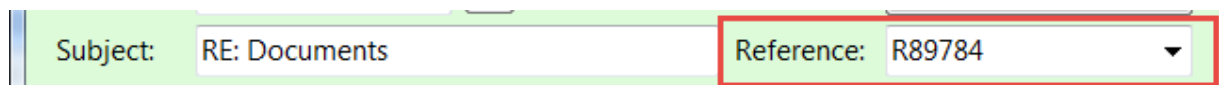
Subject: RE: Documents Reference: R89784

This field may be prefixed with some text that has been set up by your PhonePad administrator.

Reference

The Reference field is a free-form text field that can contain whatever text you want. Its purpose is to make the text available for future messages. When you enter text in this field, PhonePad will remember it so that the next time you create an incoming or outgoing phone message you can select the text from the drop-down list.

The text in the drop-down list is available for *all* users to access.



Subject: RE: Documents Reference: R89784

Possible uses for this field are: patient numbers, client numbers, file numbers and so on.

Message Options

There are a couple of options you can use with Outgoing Messages.

Urgent Private Attachments

Private	When checked, only the recipients and sender of the message can view it. Anyone else who has access to your Inbox and folders will not be able to read the message unless they are also a recipient.
Urgent	When checked the message will be marked as Urgent.

Attachments

You can attach up to 5 attachments to each message.

New Outgoing Message (To: Abby Brock)

Caller:	Abby Brock	Date:	20/01/2016
Company:	Mathews Limited	Time:	12:45 PM
Phone:	8171612	Category:	My Category
Subject:	RE: Documents	Reference:	R89784

Urgent Private Attachments

Click the **Attachments** button.

Attachments ✕

Attached Files:

D:\Documents\Document_1.txt

+ Add

View

✕ Delete

Clear

↶ Close

? Help

You can attach up to 5 files. Each attachment is limited to 10MB.

Add	Add an attachment. You can add up to 5.
View	View the selected attachment.
Delete	Delete the selected attachment.
Clear	Delete all attachments.
Close	Close the Attachments window.
Help	Display online help.

If you have added any attachments, the number of attachments will be displayed on the **Attachments** button (the red circle is known as a "Badge").

Subject: RE: Documents Reference: R89784

Urgent Private **Attachments** ³

Message:

Message Text

The **Message** field is where you can enter additional information.

Message:

✂️ 📄 📁 📄 Tahoma 11 [Color] [B] [I] [U] [S] [List] [List] [List] [List] ABC ✓

She will have the signed documents back to us by Friday.

Taken By: Steve

This field has its own toolbar so that you can customize the appearance of the text you enter. The usual buttons are there such as Cut, Copy and Paste, as well as buttons to manipulate the font.

There is also a spell checker to check your spelling. You can either click the Spell Check button on the message toolbar, or you can use Live Spell Check (you will see red squiggly lines under words that may be mis-spelt).

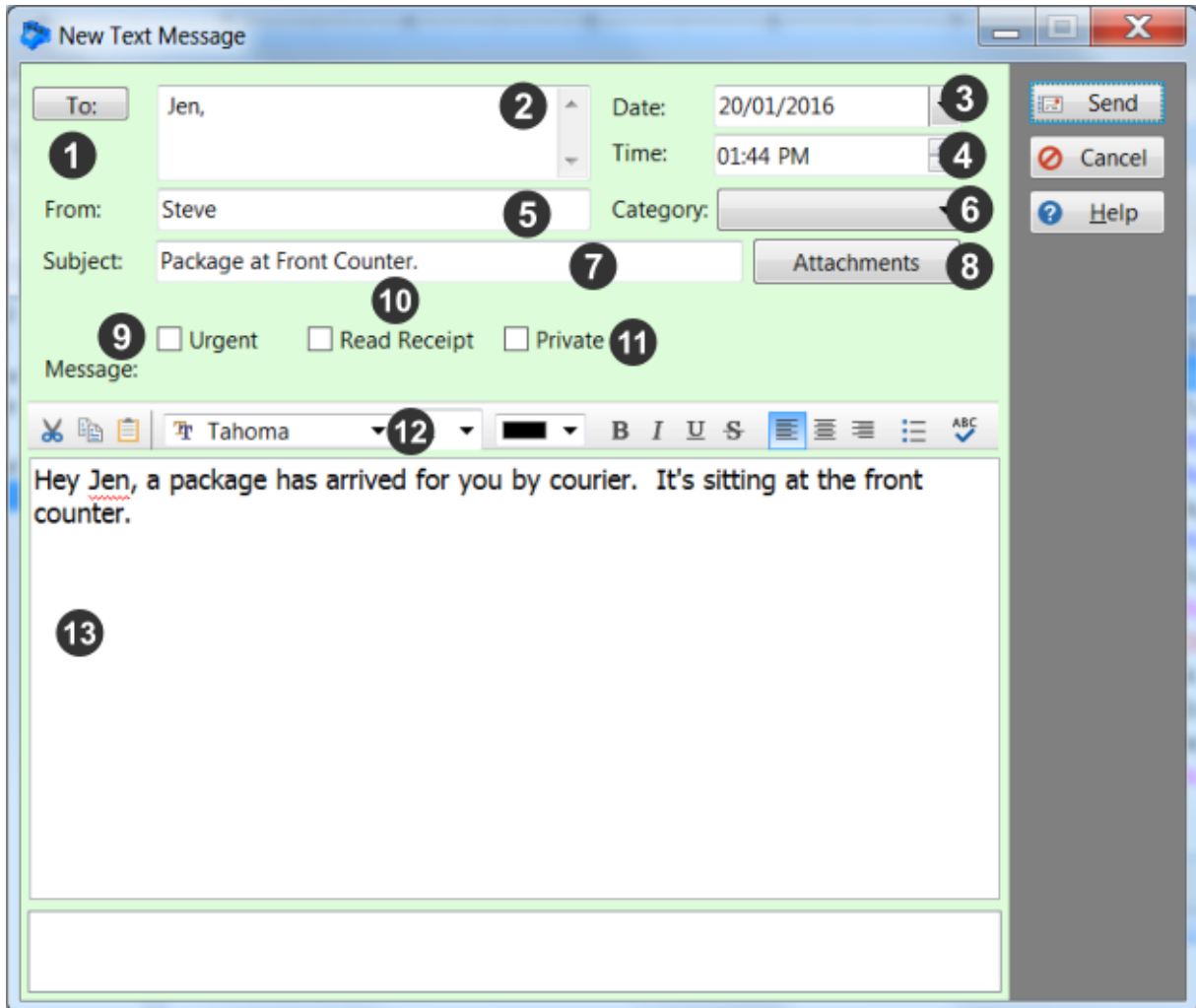
Saving the Message

All that's left to do is click the **Save** button. The message will be saved in your Outgoing folder.

Text Messages

Text messages are messages that are **not** phone messages. They are generally used for intra-office communications. There are no callers in text messages. They are messages sent between users.

Do not confuse text messages with SMS text messages that you send to cell/mobile phones. Although they sound similar, they are completely different.



1	Click the To button to display a list of all PhonePad users. Select the users you want the message sent to.
2	As an alternative to clicking the To button, you can just type the user names in this field. It will automatically do an incremental search and find the user's name for you. Press <ENTER> to select a name.
3	The date field is automatically filled in for you but you can change it if needed.
4	The time field is automatically filled in for you but you can change it if needed.
5	Your name will be entered here by PhonePad when you create a new message. This cannot be changed.
6	You can assign this call to a Category (if your administrator has set them up).
7	Subject of the message.

8	You can add attachments to messages. If there is an attachment, the number of attachments will be shown in a red circle (which is known as a "Badge").
9	If checked, the message will be marked as Urgent.
10	If checked, you will receive a message when the recipient/s read the message.
11	If checked, any user who has access to your folders will not be able to read the content of the message unless they are one of the recipients.
12	Toolbar for the message text.
13	The message text is where you enter additional details of the call.

Creating a Text Message

To log an outgoing phone call, click the **New Text Message** button on the toolbar, or select **New Text Message** from the **File** menu, or press the **<alt> <insert>** keys on your keyboard.

Message Date and Time

PhonePad will automatically fill in the current date and time for you. You can change these if needed.

Date: 20/01/2016

Time: 01:57 PM

Category: My Category

To change the date, you can either type it in or select it from the drop-down calendar.

Date: 20/01/2016

Time: 01:57 PM

Category: My Category

January 2016

M	Tu	W	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today Clear

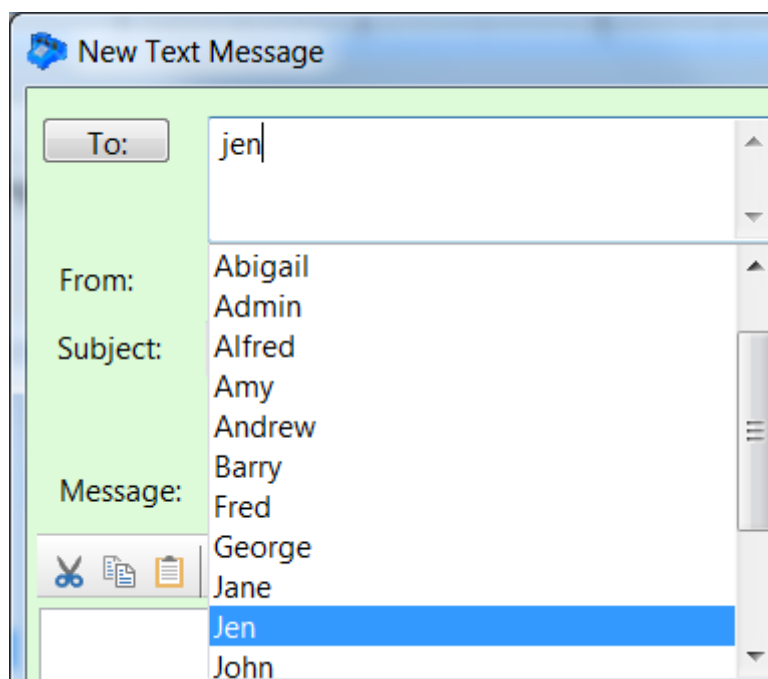
To edit the time, use the up and down arrows keys on your keyboard to change the hour, minutes and am/pm. You can also use the up and down arrow buttons in the **Time** field.

Use the left and right arrow keys to move between hours, minutes and am/pm.

Recipients

The first step is to address the message to at least one person.

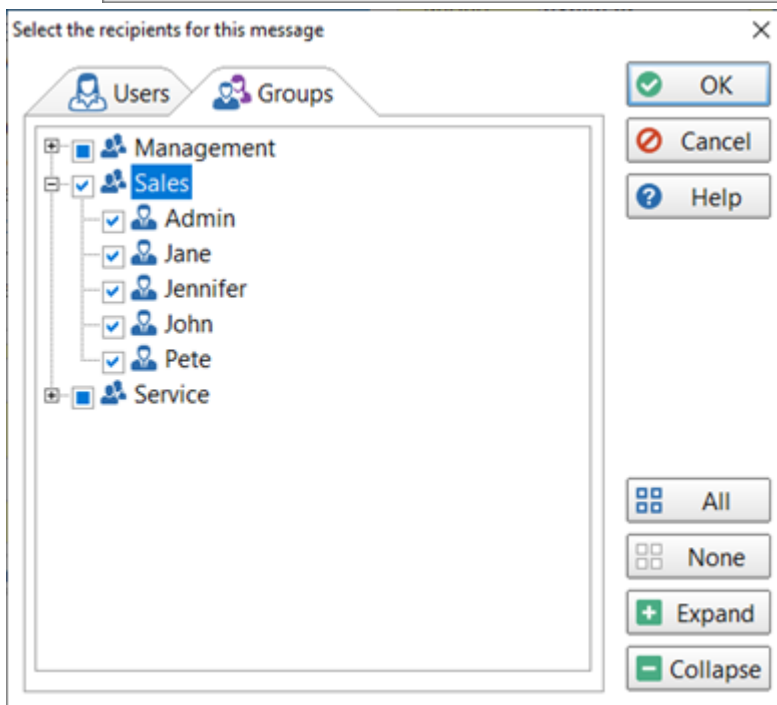
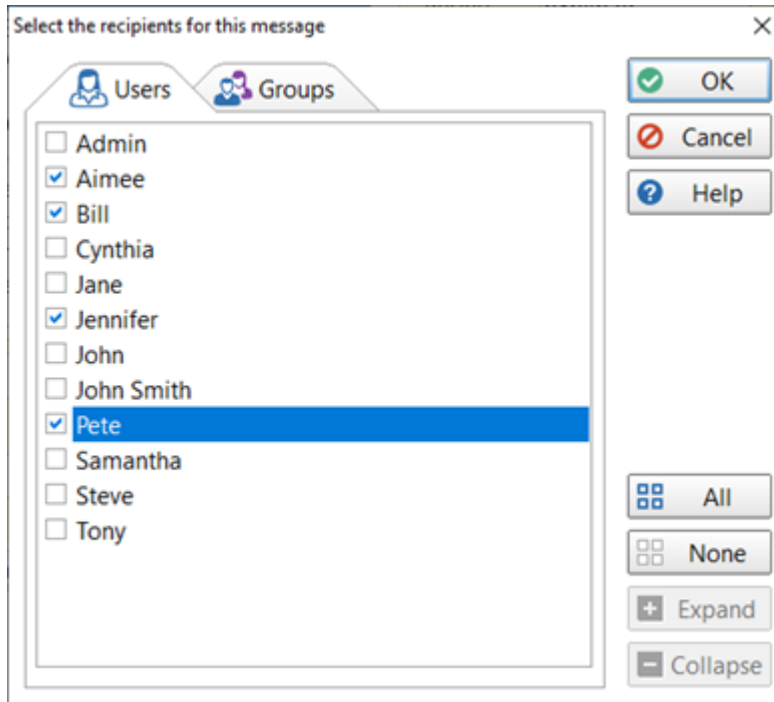
The fastest way to do this is to type in the **To** field.



As you type in a name, PhonePad will drop down a list of users and perform an incremental search. Press **<enter>** to select a user. You can add additional users if you want.

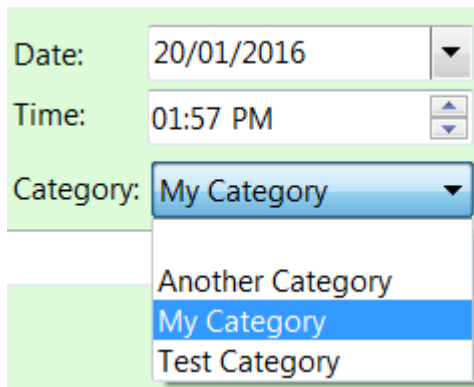
Names beginning with a # are groups, eg. *#Service*. When you send a message to a group it will be sent to everyone in the group.

You can also select names by clicking the **To** button. The **Users** tab allows you to select users while the **Groups** tab allows you to select groups. You can expand a group to see who the members are.



Category

If your PhonePad administrator has created some categories, you can select a Category from the drop-down list.

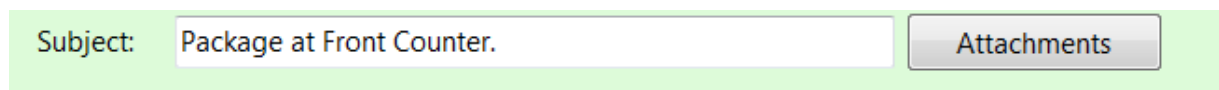


Date: 20/01/2016
Time: 01:57 PM
Category: My Category

Another Category
My Category
Test Category

Subject

The **Subject** is the subject of the phone call, although you can enter whatever you like in this field. .

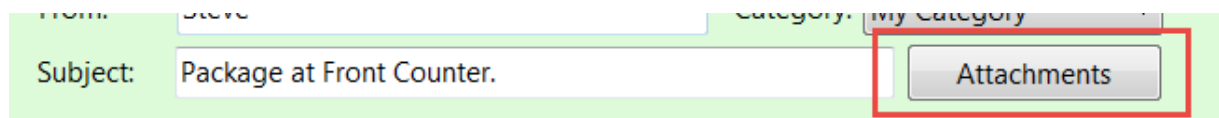


Subject: Package at Front Counter. Attachments

This field may be prefixed with some text that has been set up by your PhonePad administrator.

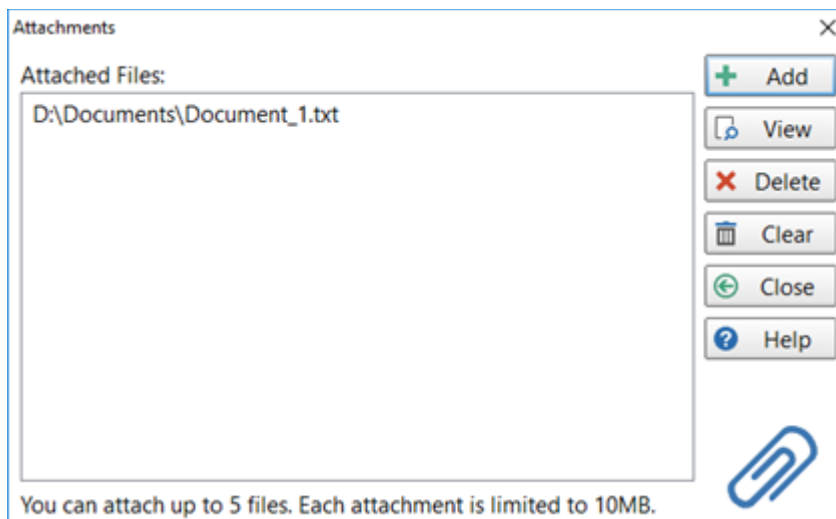
Attachments

You can attach up to 5 attachments to each message.



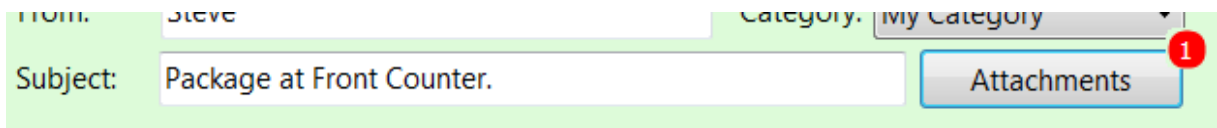
Subject: Package at Front Counter. Attachments

Click the **Attachments** button.



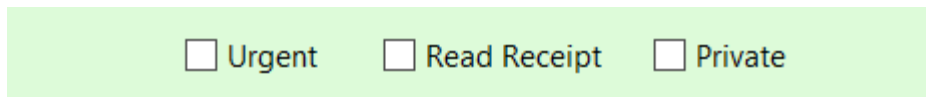
Add	Add an attachment. You can add up to 5.
View	View the selected attachment.
Delete	Delete the selected attachment.
Clear	Delete all attachments.
Close	Close the Attachments window.
Help	Display online help.

If you have added any attachments, the number of attachments will be displayed on the **Attachments** button (the red circle is known as a "Badge").



Message Options

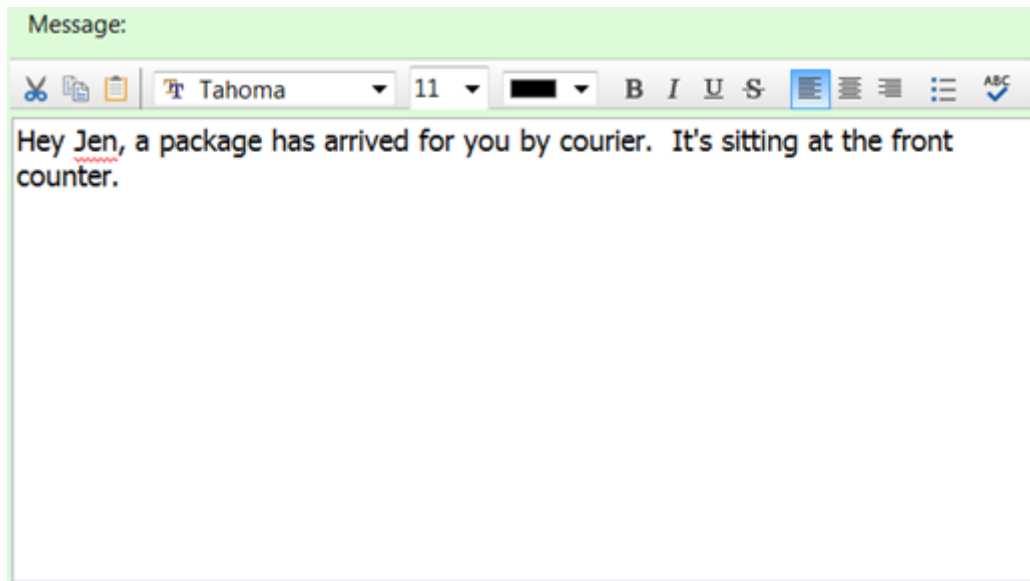
As with other message types, there are some options you can use with Text Messages.



Urgent	When checked the message will be marked as Urgent.
Read Receipt	When checked, you will receive a receipt message when a recipient has read the message.
Private	When checked, only the recipients and sender of the message can view it. Anyone else who has access to your Inbox and folders will not be able to read the message unless they are also a recipient.

Message Text

The **Message** field is where you can enter additional information.

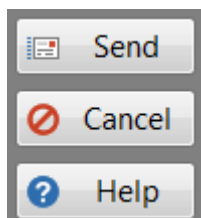


This field has its own toolbar so that you can customize the appearance of the text you enter. The usual buttons are there such as Cut, Copy and Paste, as well as buttons to manipulate the font.

There is also a spell checker to check your spelling. You can either click the **Spell Check** button on the message toolbar, or you can use **Live Spell Check** (you will see red squiggly lines under words that may be mis-spelt).

Sending the Message

All that's left to do is click the **Send** button.

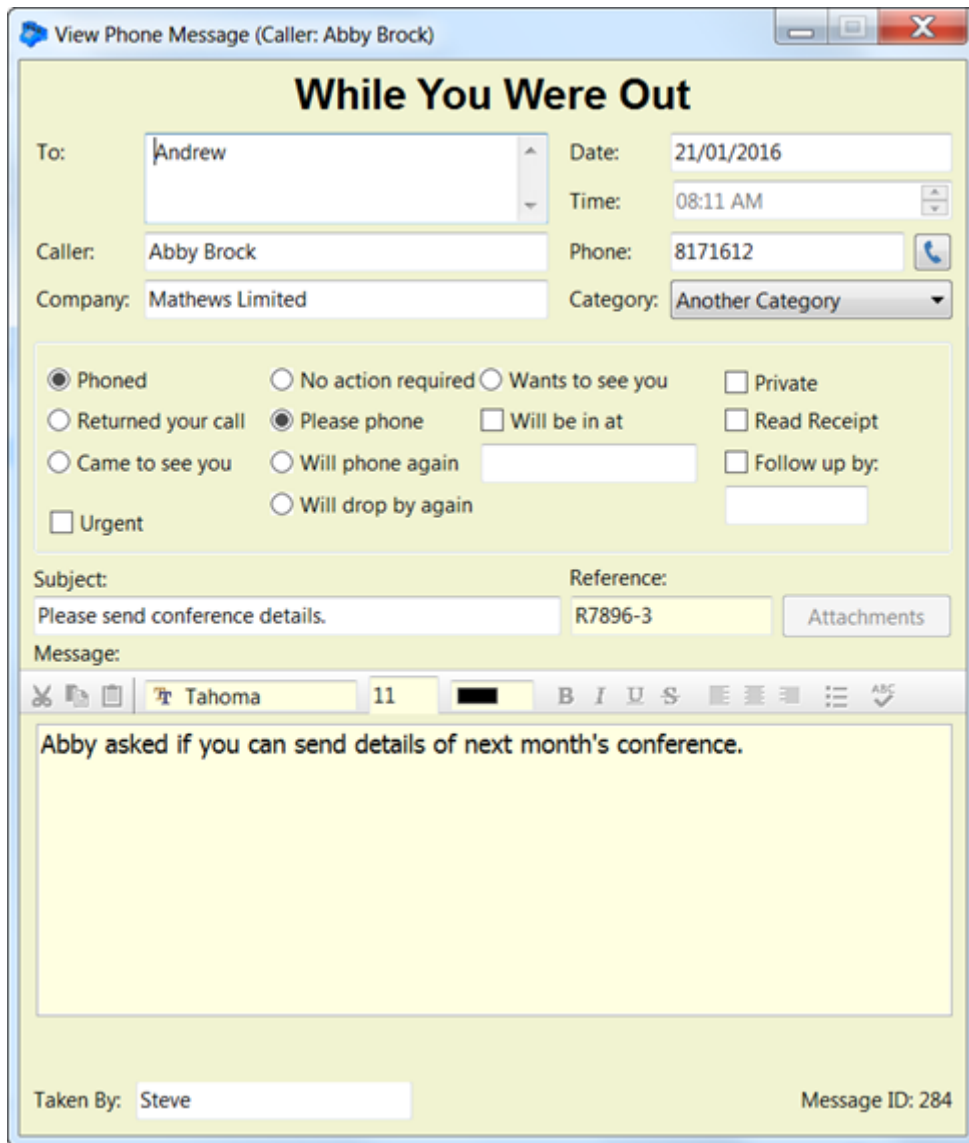


Viewing Messages

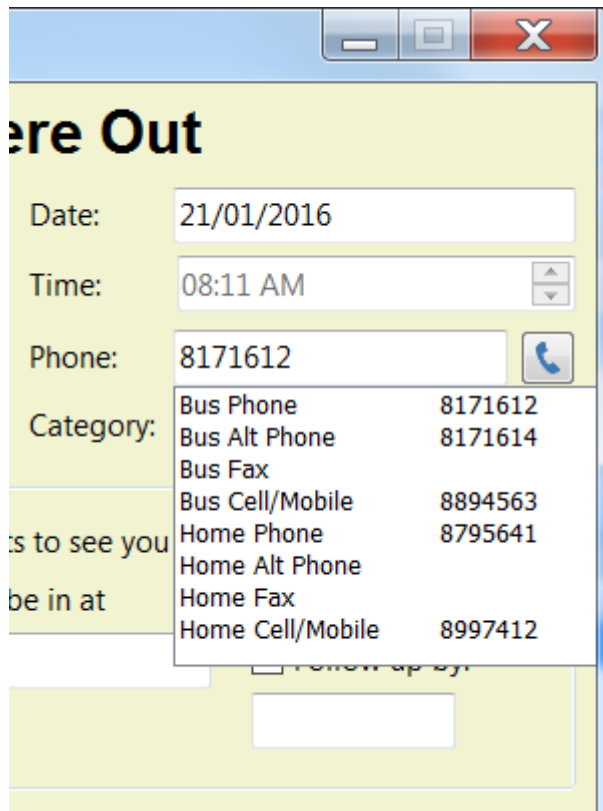
Viewing Phone Messages (Incoming)

Select the phone message from the message list and click the **View** button on the **Home** tab of the toolbar, or select **View Message** from the **File** menu, or double-click on the message.

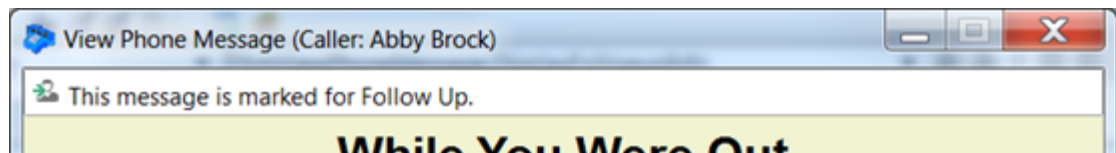
The phone message will be displayed.



If you click on the button with the phone icon, you can view alternative phone numbers for the caller.



If there is follow up action on the message, this will be displayed at the top of the message window.



Message details cannot be changed unless your PhonePad administrator has allowed this.

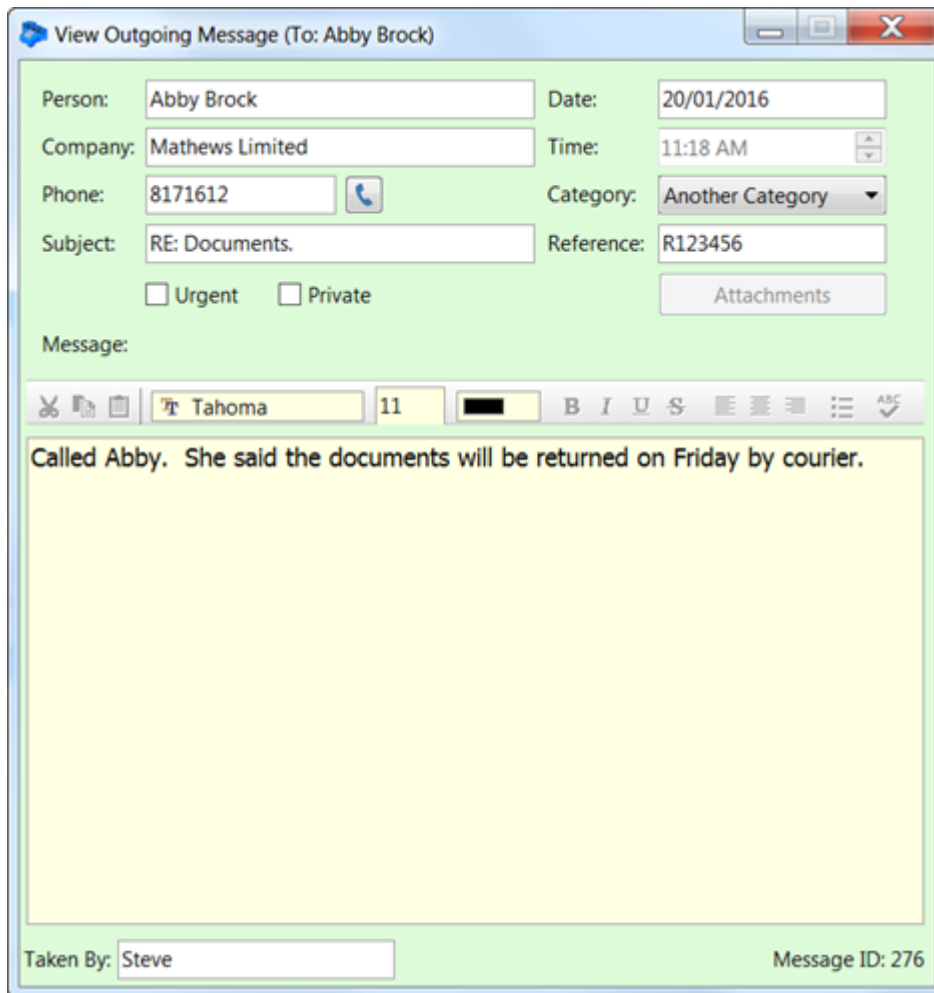


Every message has a unique Message ID, displayed in the right-bottom corner. You can use this to identify messages.

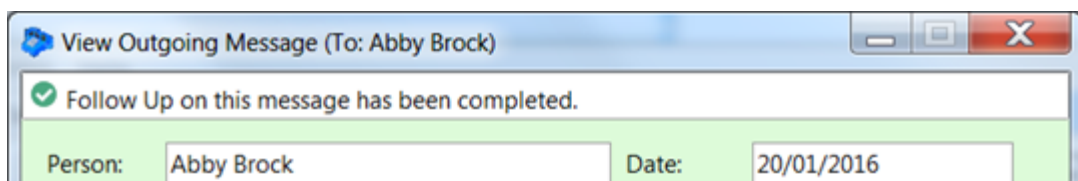
Viewing Phone Messages (Outgoing)

Select the phone message from the message list and click the **View** button on the **Home** tab of the toolbar, or select **View Message** from the **File** menu, or double-click on the message.

The outgoing message will be displayed.



If there is follow up action on the message, this will be displayed at the top of the message window.

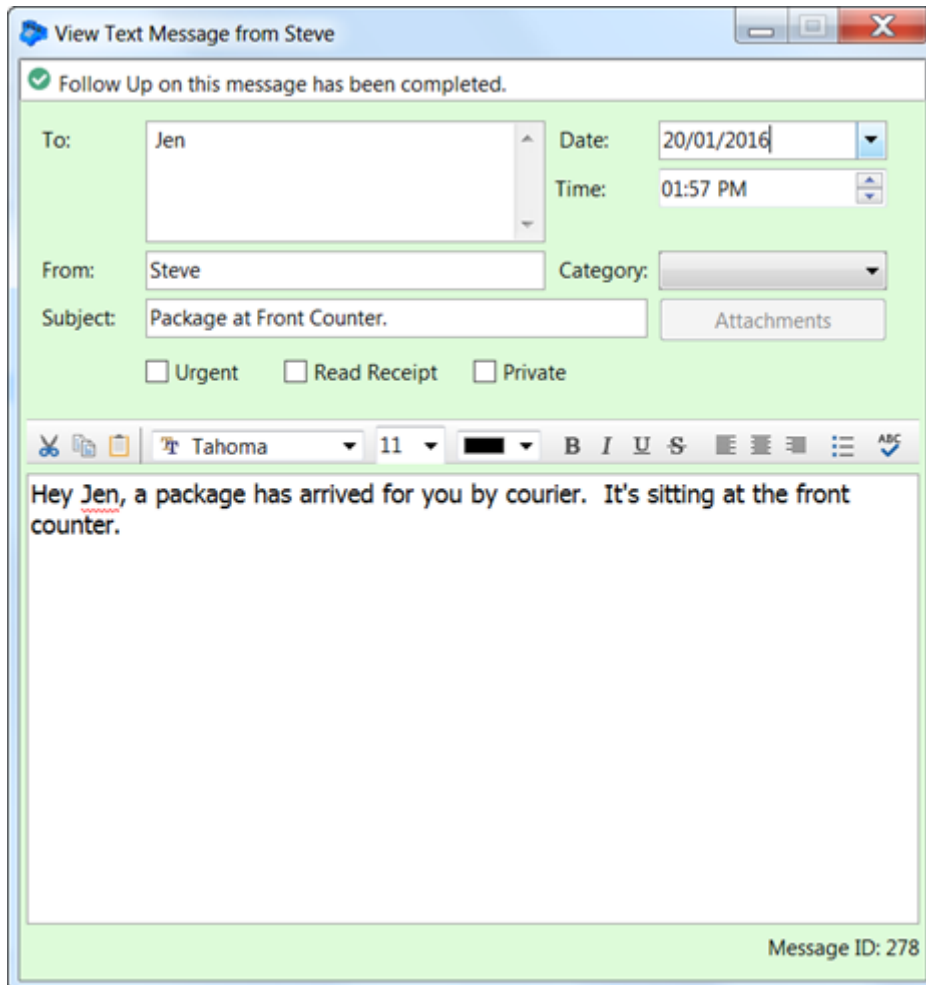


Every message has a unique Message ID, displayed in the right-bottom corner. You can use this to identify messages.

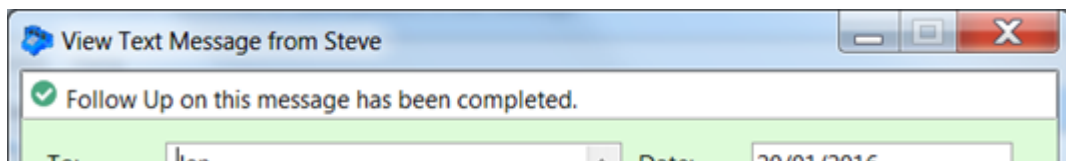
Viewing Text Messages

Select the text message from the message list and click the **View** button on the **Home** tab of the toolbar, or select **View Message** from the **File** menu, or double-click on the message.

The text message will be displayed.



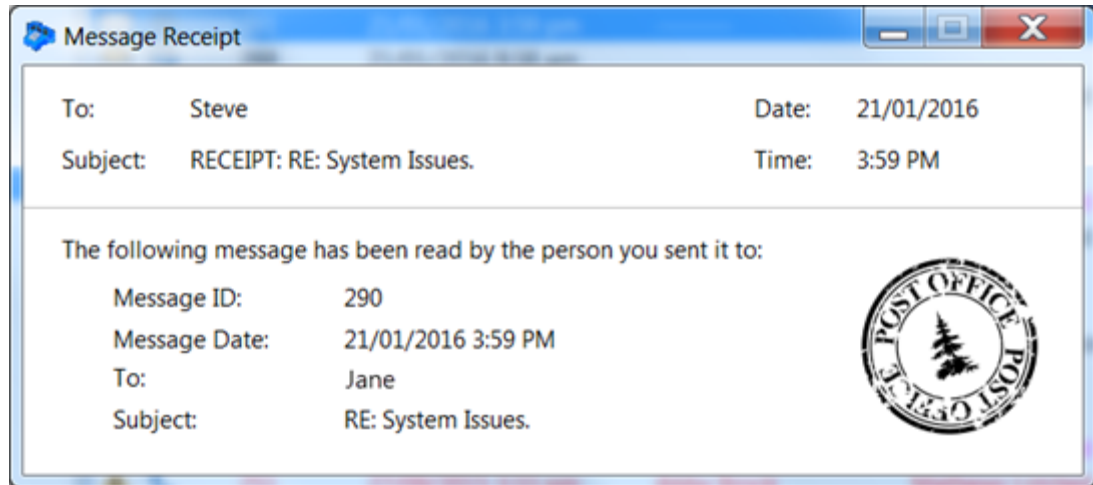
If there is follow up action on the message, this will be displayed at the top of the message window.



Every message has a unique Message ID, displayed just below the Attachments button. You can use this to identify messages.

Viewing Message Read Receipts

Select the message receipt from the message list and click the **View** button on the **Home** tab of the toolbar, or select **View Message** from the **File** menu, or double-click on the message.

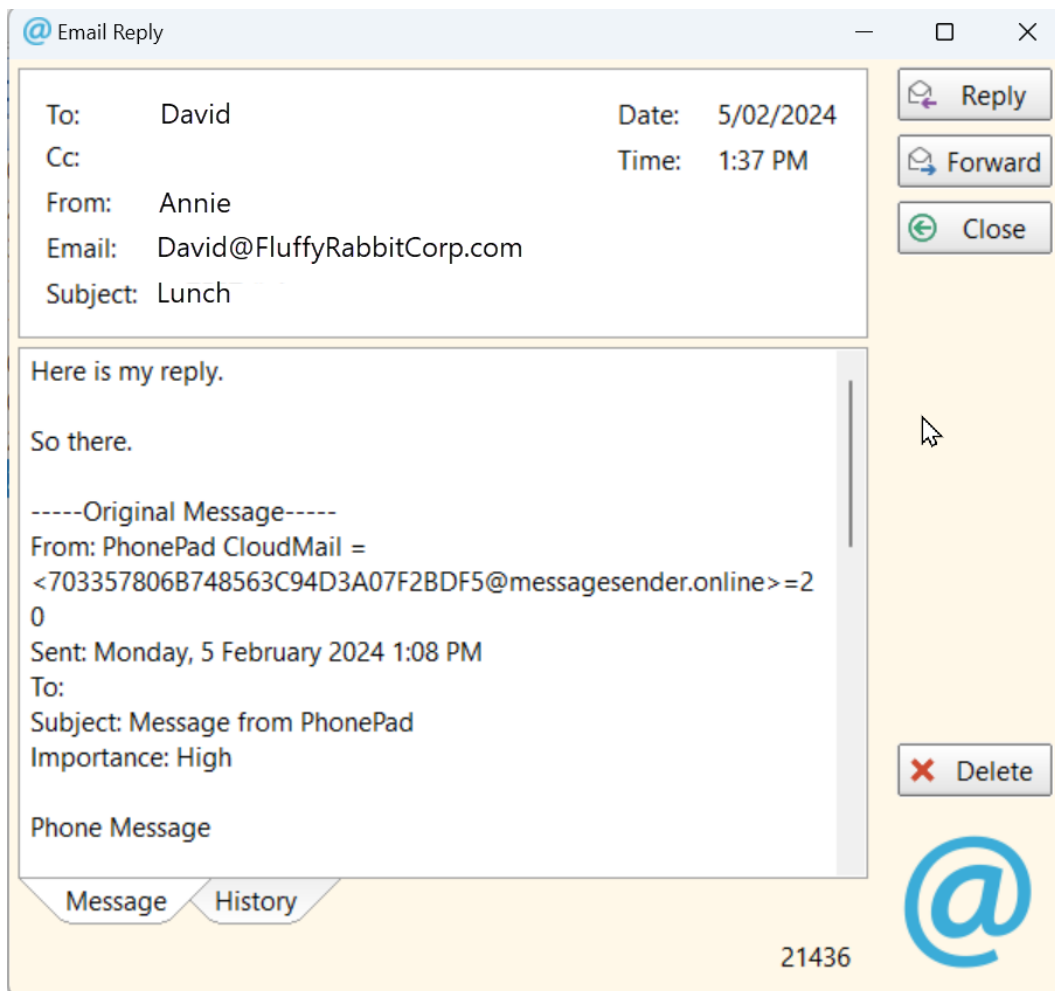


This message types are for phone and text messages sent via PhonePad to other users.

Viewing Email Replies

Select the email reply message from the message list and click the **View** button on the **Home** tab of the toolbar, or select **View Message** from the **File** menu, or double-click on the message.

The email reply message will be displayed.

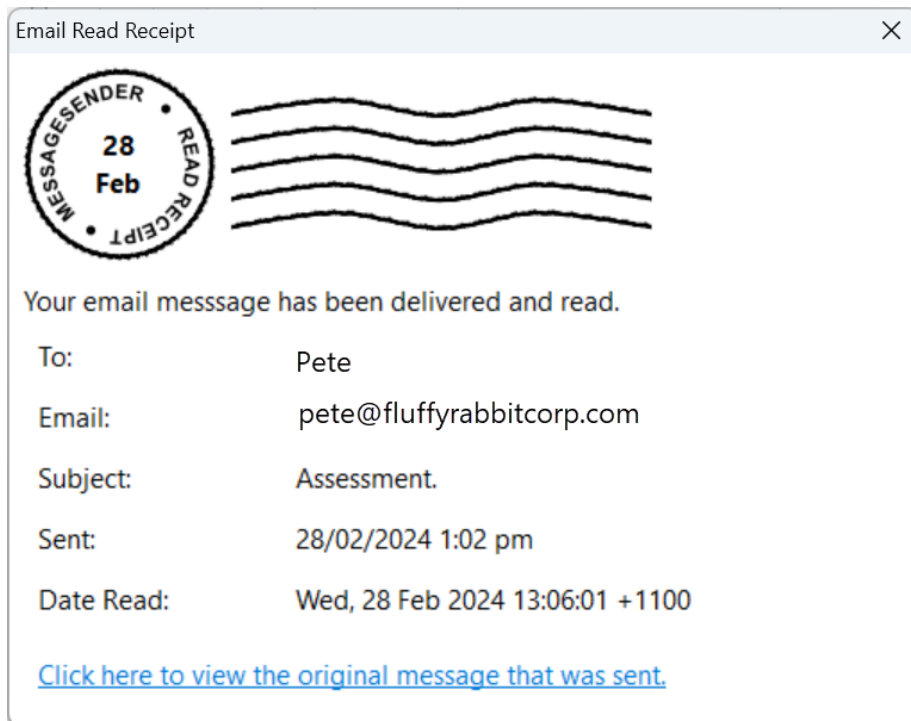


Viewing Email Read Receipts

The Automatic Message Forwarding feature can automatically forward phone and text messages to email addresses.

If you have checked the **Read Receipt** checkbox in a message before sending it, you can get a **Read Receipt** back from the email system when the recipient reads the email.

Please note: This option has to be enabled by a System Administrator under MessageSender settings.



Email Read Receipts are different from Message Read Receipts. Email Read Receipts are received when a user has their messages forwarded to an email address using the Automatic Message Forwarding feature.

Viewing Email Delivery Failure Messages

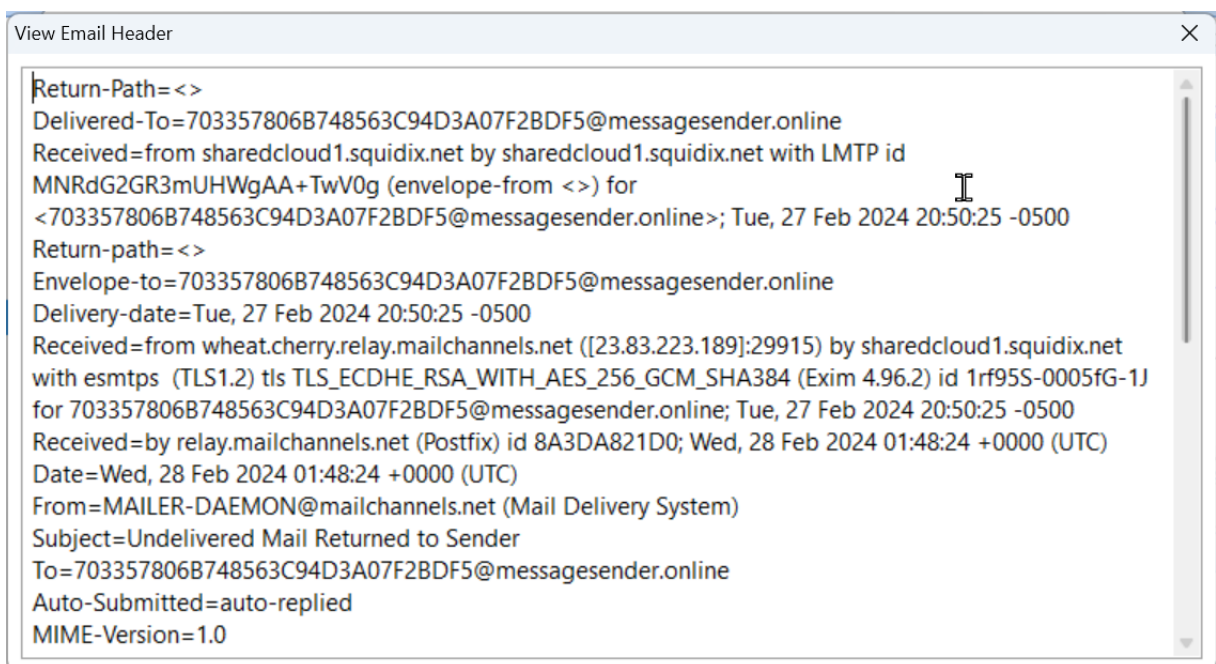
Sometimes emails cannot be delivery for one reason or another. In these cases you will receive an **Email Delivery Failed** message in your Inbox.



In the above example the email address is incorrect.

You can view the original message that was sent by clicking *Click here to view the original message that was sent.*

You can also view the **email message header**. Unless you know how to read these headers, it may not be that useful to you.

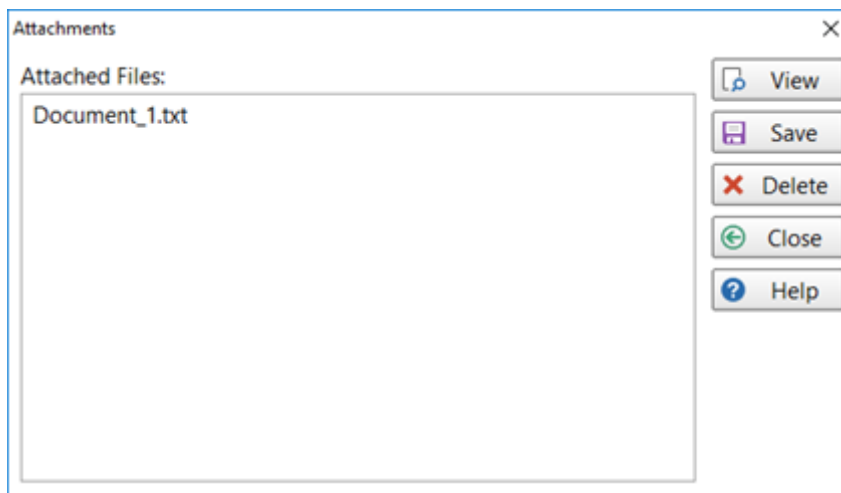


Viewing Attachments

Phone, text and outgoing messages can all have attachments. If a message has one or more attachments the number of attachments will be shown on the **Attachments** button.



Click the **Attachments** button to view the list of attachments.

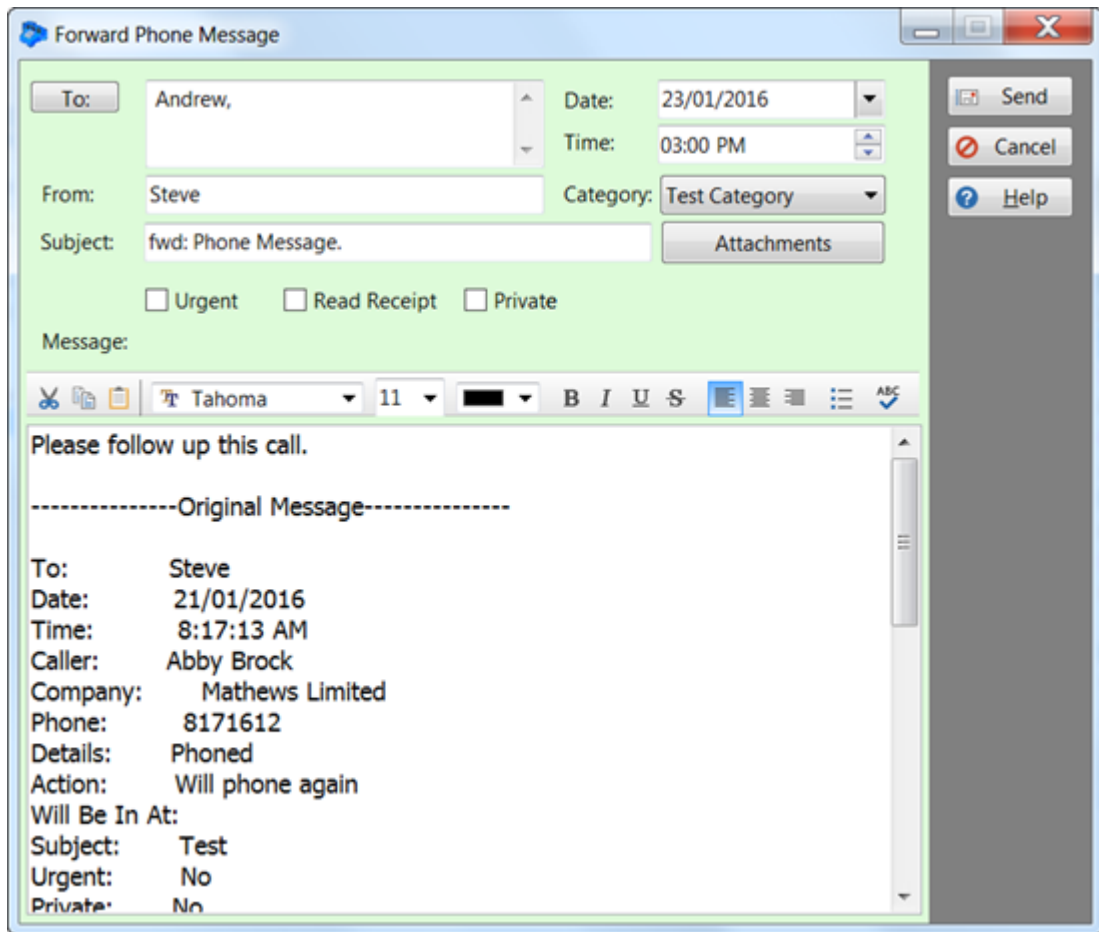


In this example there is one attachment.

View	Select an attachment and click the View button. Windows will attempt to open the attachment using the default application associated with the file type.
Save	Save the selected attachment to a folder.
Delete	Delete the selected attachment.
Close	Close the Attachments window.
Help	Display online help.

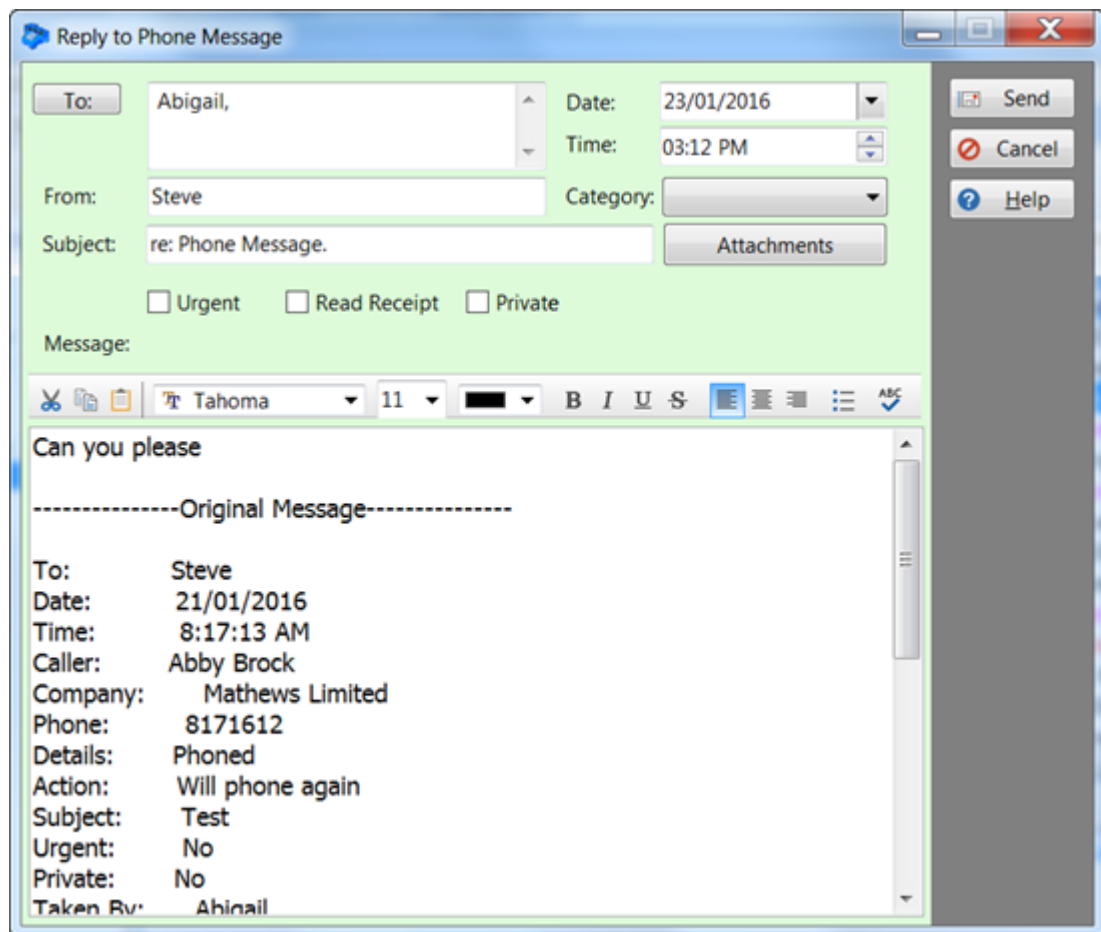
Forwarding Messages

Messages can be forwarded to other users. Select the message and click the **Forward** button on the **Home** tab of the toolbar, or right-click on the message and select **Forward Message** from the popup menu.



Replying to Messages

You can reply to a message that you have received from another user. Select the message and click the **Reply** button on the **Home** tab of the toolbar, or right-click on the message and select **Reply to Message** from the popup menu.



Resending Messages

Messages that you have sent previously can be resent to the same recipients. Select the message in your Sent folder and click the **Resend** button on the **Home** tab of the toolbar, or right-click on the message and select **Resend Message** from the popup menu.

Moving Messages to Another User's Inbox

If you receive a message that should be assigned to someone else, you can move the message to their Inbox. You will need to have access to the other user's Inbox before doing this.

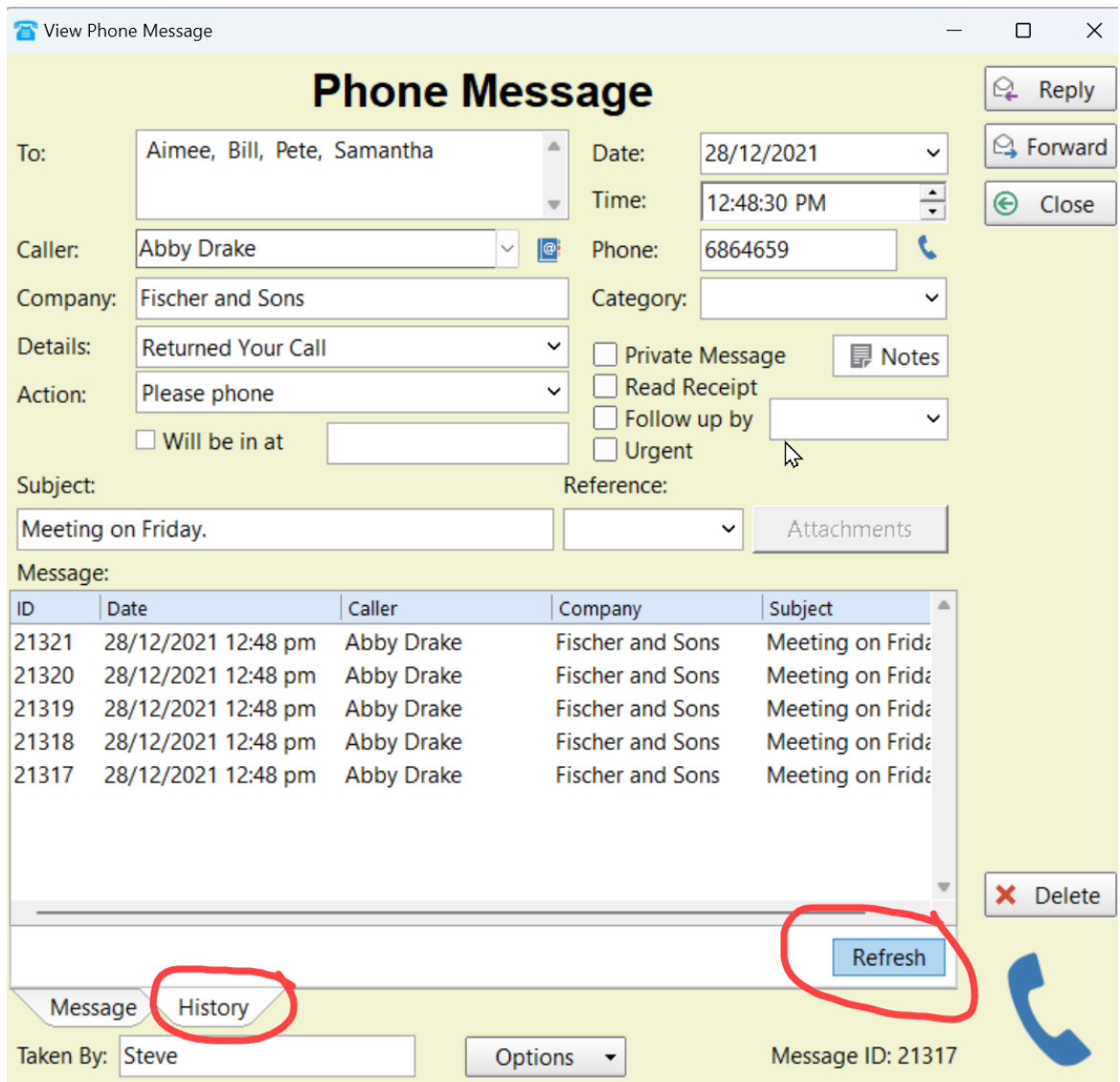
Inbox for Steve			Search			
			ID	Date	Caller	
Abigail	10	6				
Andrew	32	17				
Jen	1	1				
Jasper	1	1				
John	1	1				
Steve	40	22				
			507	01/04/2016 2:49 pm	Abby Br	
			505	25/03/2016 7:27 pm	Sabrina	
			503	25/03/2016 7:19 pm	Walter	
			501	24/03/2016 2:36 pm	Mabel C	
			499	24/03/2016 1:53 pm	Sabrina	
			489	23/03/2016 6:42 am	Heather	
			487	23/03/2016 6:39 am	Gena Gc	
			483	18/03/2016 9:57 am	Lacey B	
			481	18/03/2016 8:18 am	Barbara	

Select the messages you want to reassign, and while holding down the **<alt>** key and **left mouse button**, move the cursor to the user you want to reassign the messages to, then release the mouse button. The messages will immediately be moved from your Inbox to their Inbox.

Message History

When you view a phone, text or outgoing message, at the bottom of the window is a **History** tab.

Click the History tab, and then click the Refresh button to load the history for the message.

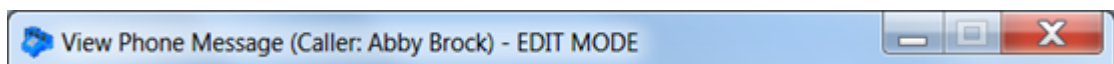


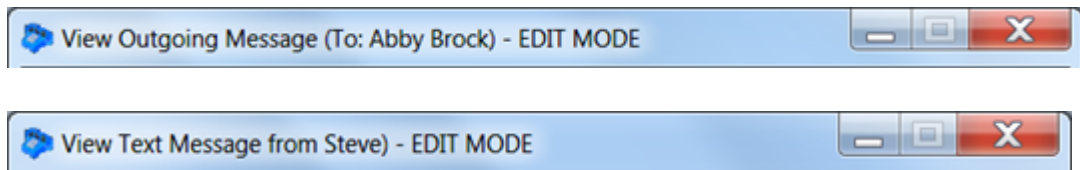
In this example, there are 5 messages (including the current one). You can view any of these messages by double-clicking on them.

Editing Received or Sent Messages

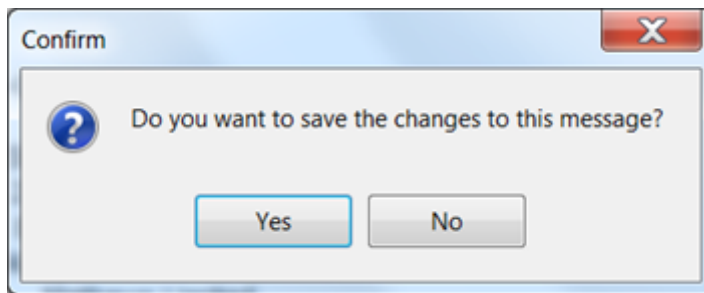
If your PhonePad administrator has enabled message editing for messages that have been sent or received, then you will be able to change some of the details of messages.

When you view a message, if it can be edited "EDIT MODE" will be displayed in the message title bar.





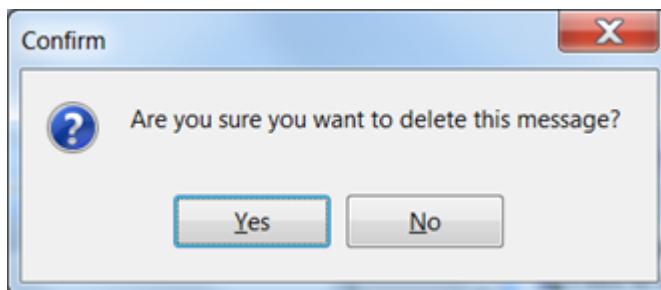
If you make any changes to a message you will be prompted to save the changes when you close it.



Deleting Messages

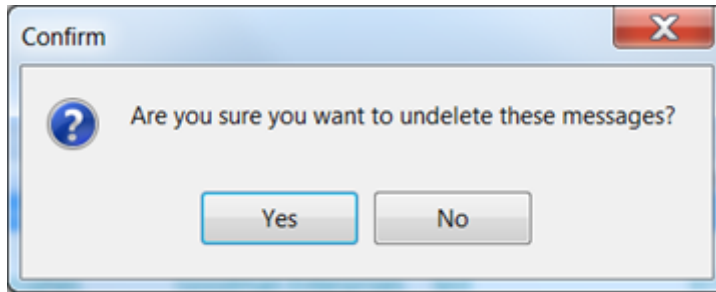
You can delete messages from any of your folders by selecting the message and clicking the **Delete** button on the **Home** tab of the toolbar, or by selecting **Delete Message** from the **File** menu, or by pressing the **<delete>** or **** key on your keyboard.

You will be asked to confirm the deletion.



Deleted messages go to your Deleted folder. If you need to undelete a message from the **Deleted** folder, select the message and then click the **Undelete Messages** button on the **Folders** tab of the toolbar, or right-click on the message and select **Undelete Messages**.

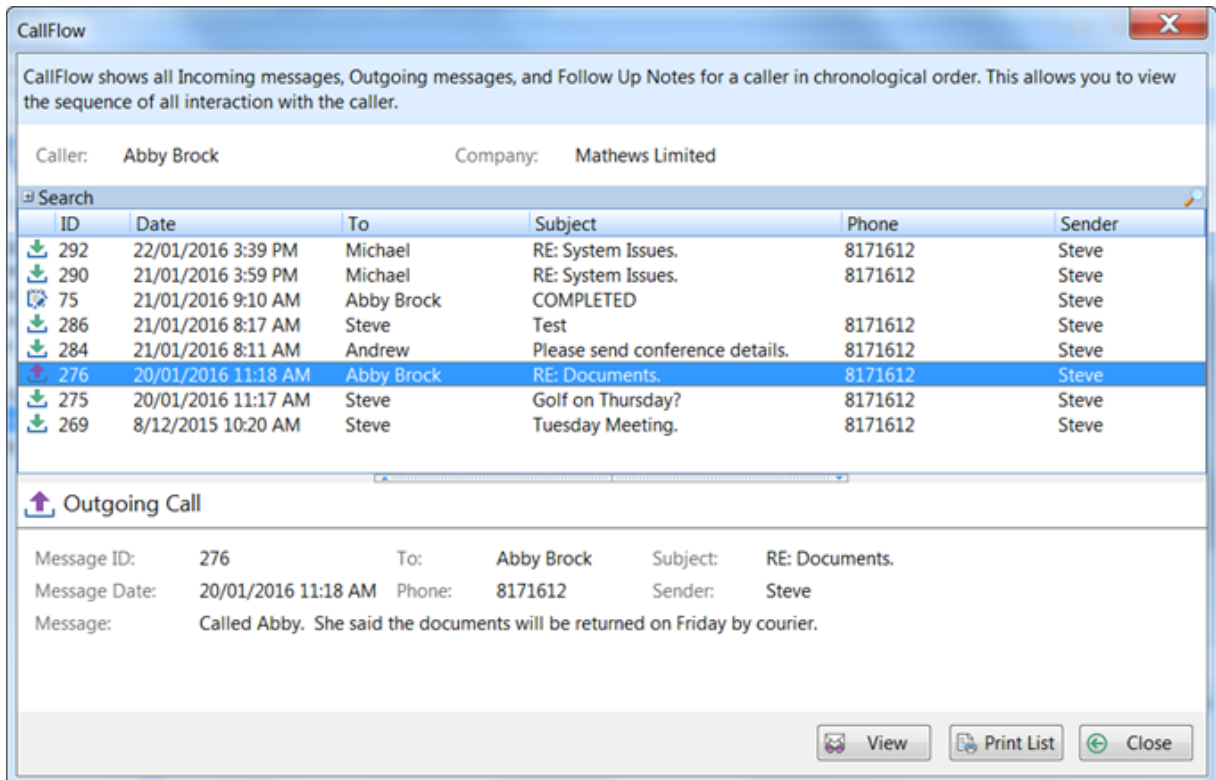
You will be asked to confirm the undeletion.



 Messages are automatically deleted from the **Deleted** folder after they have been there for 14 days.

CallFlow

CallFlow provides a way to view all interactions with a caller in one place. It shows a complete history of all incoming and outgoing calls, and follow up notes.



View Click this button to view an incoming or outgoing message.

Print List	Print a list of all messages.
Close	Close this window.

Printing Messages

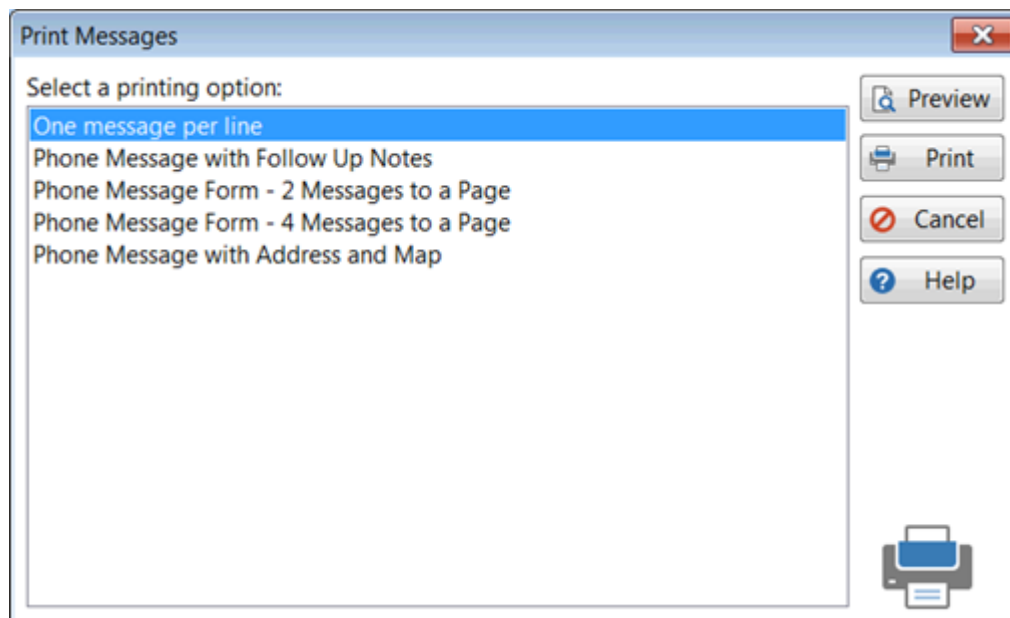
There are various print options in PhonePad.

Print Messages

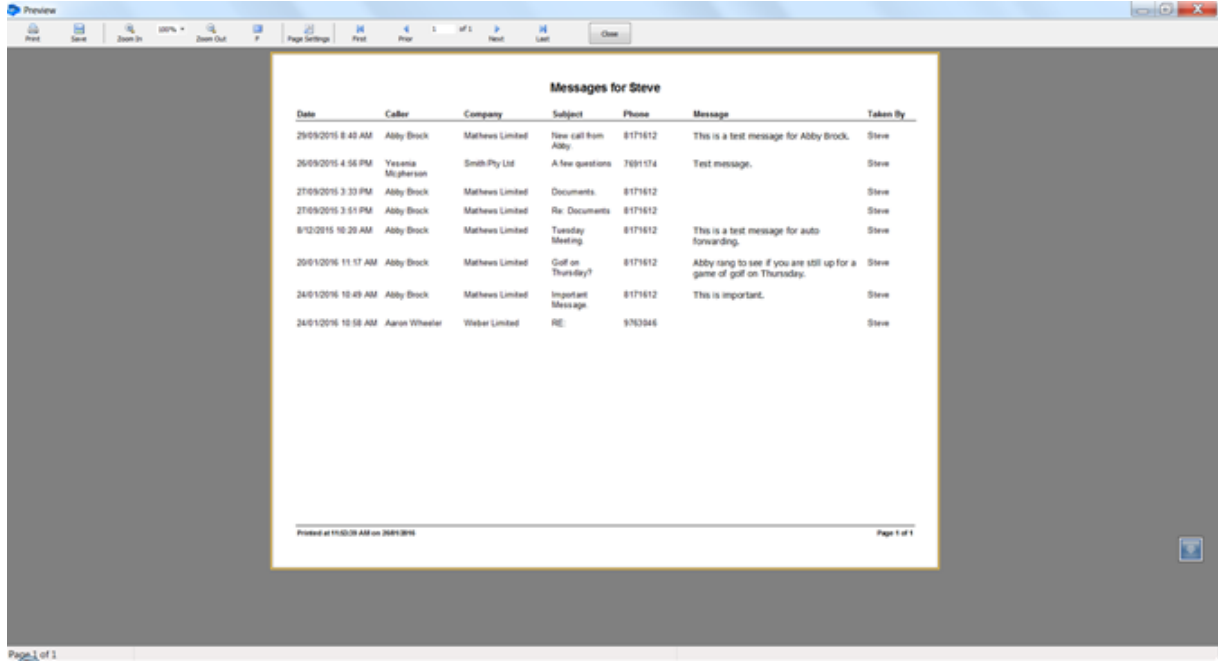
To print one or more messages, select the messages from the message list and then click the **Print** button on the **Home** tab of the toolbar, or select **Print** from the **File** menu.



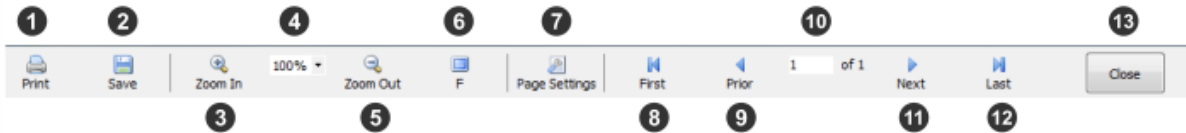
You will be presented with a number of choices (refer to Printing Options for an explanation of each report).



Select a printing option then click **Preview**. The Preview window will be displayed.



The Preview toolbar features a number of options:



1	Print	Print the report.
2	Save	Export the report to a number of formats including PDF.
3	Zoom In	Zoom in to the page.
4	Zoom Percentage	Select or enter a zoom percentage.
5	Zoom Out	Zoom out from the page.
6	Fullscreen	Display the report in Fullscreen mode.
7	Page Settings	Change the page settings.
8	First	Jump to the first page of the report.
9	Prior	Move to the previous page.

10	Page Number	Shows the current page number. You can directly enter a page number here.
11	Next	Move to the next page.
12	Last	Jump to the last page of the report.
13	Close	Close the report.

Printing Options

These are the currently available printing options for the **Print** option.

One message per line	Messages are printed across the page with one message per line.
Phone Message with Follow Up Notes	Each message is printed one to a page with Follow Up Notes included.
Phone Message Form - 2 Messages to a Page	Messages are printed in the message form format, which looks like the paper-based message pads. Two to a page are printed.
Phone Message Form - 4 Messages to a Page	Messages are printed in the message form format, which looks like the paper-based message pads. Four to a page are printed. Depending on the message content this may not be the best way to print them. If the message text is large then it will not all fit on the page.

Example Printouts

Messages for Steve						
Date	Caller	Company	Subject	Phone	Message	Taken By
8/12/2015 10:20 AM	Abby Brock	Mathews Limited	Tuesday Meeting.	8171612	This is a test message for auto forwarding.	Steve
20/01/2016 11:17 AM	Abby Brock	Mathews Limited	Golf on Thursday?	8171612	Abby rang to see if you are still up for a game of golf on Thursday.	Steve
20/01/2016 8:26 PM	Abby Brock		Urgent Matter.	8894563	Please call.	Steve
21/01/2016 8:17 AM	Abby Brock	Mathews Limited	Test	8171612	Test	Steve

Printed at 10:56:04 AM on 26/01/2016 Page 1 of 1

Image: One message per line

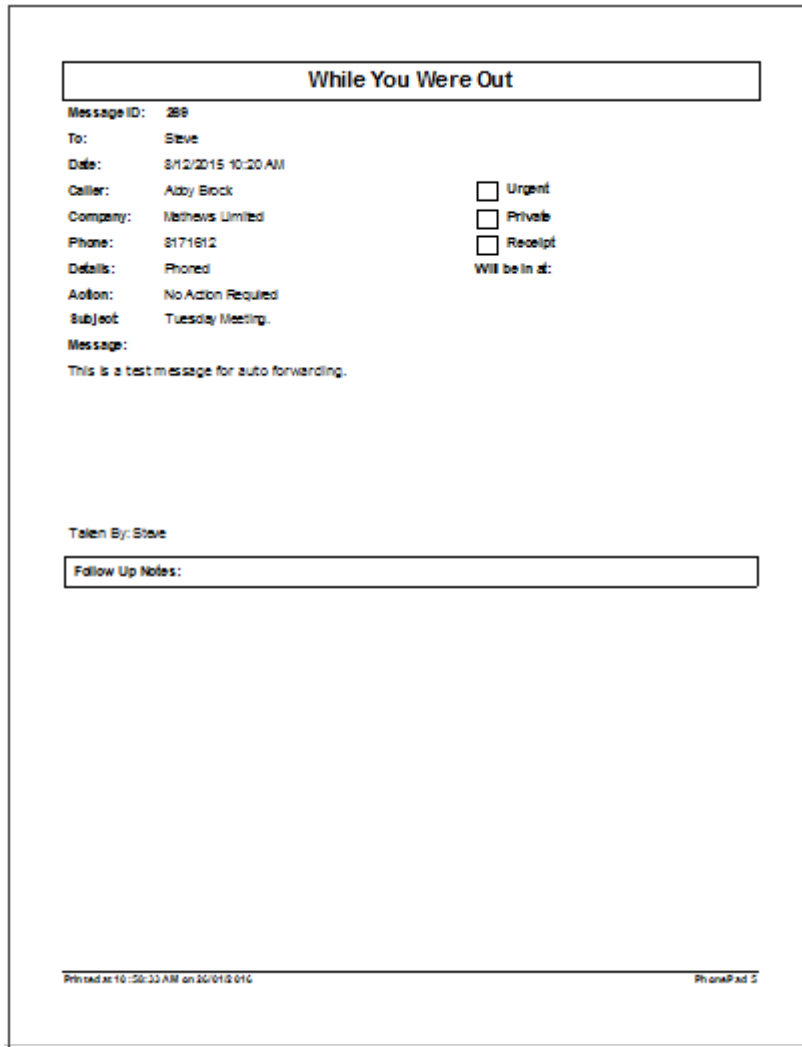


Image: Print Message with Follow Up Notes

While You Were Out	
To: Steve	Date: 8/12/2015 10:20 AM
Caller: Abby Brock	Time: 8/12/2015 10:20 AM
Company: Mathews Limited	Phone: 8171612
<input checked="" type="checkbox"/> Phoned	<input checked="" type="checkbox"/> No action required <input type="checkbox"/> Wants to see you
<input type="checkbox"/> Returned your call	<input type="checkbox"/> Please phone <input type="checkbox"/> Will be in at:
<input type="checkbox"/> Came to see you	<input type="checkbox"/> Will phone again
<input type="checkbox"/> Urgent	<input type="checkbox"/> Will drop by again <input type="checkbox"/> Private
Subject: Tuesday Meeting.	
Message: This is a test message for auto forwarding.	
Taken By: Steve _____ Message ID: 269	
Printed at 11:02:40 AM on 26/01/2016 PhonePad Version 5.0.0	

While You Were Out	
To: steve	Date: 20/01/2016 11:17 AM
Caller: Abby Brock	Time: 20/01/2016 11:17 AM
Company: Mathews Limited	Phone: 8171612
<input type="checkbox"/> Phoned	<input type="checkbox"/> No action required <input type="checkbox"/> Wants to see you
<input checked="" type="checkbox"/> Returned your call	<input checked="" type="checkbox"/> Please phone <input type="checkbox"/> Will be in at:
<input type="checkbox"/> Came to see you	<input type="checkbox"/> Will phone again
<input type="checkbox"/> Urgent	<input type="checkbox"/> Will drop by again <input type="checkbox"/> Private
Subject: Golf on Thursday?	
Message: Abby rang to see if you are still up for a game of golf on Thurssday.	
Taken By: Steve _____ Message ID: 275	
Printed at 11:02:40 AM on 26/01/2016 PhonePad Version 5.0.0	

Image: Phone Message Form - 2 Messages per Page

<p style="text-align: center;">While You Were Out</p> <p>To: Steve Date: 8/12/2015 10:20 AM</p> <p>Caller: Abby Brook Time: 8/12/2015 10:20 AM</p> <p>Company: Mathews Limited Phone: 817612</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input checked="" type="checkbox"/> Phoned</td> <td><input checked="" type="checkbox"/> No action required</td> <td><input type="checkbox"/> Wants to see you</td> </tr> <tr> <td><input type="checkbox"/> Returned your call</td> <td><input type="checkbox"/> Please phone</td> <td><input type="checkbox"/> Will Be In At:</td> </tr> <tr> <td><input type="checkbox"/> Came to see you</td> <td><input type="checkbox"/> Will phone again</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Urgent</td> <td><input type="checkbox"/> Will drop by again</td> <td><input type="checkbox"/> Private</td> </tr> </table> <p>Subject: Tuesday Meeting.</p> <p>Message:</p> <p>This is a test message for auto forwarding.</p> <p>Taken By: Steve Message ID: 269</p> <p>This message is marked for Follow Up.</p>	<input checked="" type="checkbox"/> Phoned	<input checked="" type="checkbox"/> No action required	<input type="checkbox"/> Wants to see you	<input type="checkbox"/> Returned your call	<input type="checkbox"/> Please phone	<input type="checkbox"/> Will Be In At:	<input type="checkbox"/> Came to see you	<input type="checkbox"/> Will phone again		<input type="checkbox"/> Urgent	<input type="checkbox"/> Will drop by again	<input type="checkbox"/> Private	<p style="text-align: center;">While You Were Out</p> <p>To: Steve Date: 20/01/2016 8:28 PM</p> <p>Caller: Abby Brook Time: 20/01/2016 8:28 PM</p> <p>Company: Phone: 8294562</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input checked="" type="checkbox"/> Phoned</td> <td><input checked="" type="checkbox"/> No action required</td> <td><input type="checkbox"/> Wants to see you</td> </tr> <tr> <td><input type="checkbox"/> Returned your call</td> <td><input type="checkbox"/> Please phone</td> <td><input type="checkbox"/> Will Be In At:</td> </tr> <tr> <td><input type="checkbox"/> Came to see you</td> <td><input type="checkbox"/> Will phone again</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Urgent</td> <td><input type="checkbox"/> Will drop by again</td> <td><input type="checkbox"/> Private</td> </tr> </table> <p>Subject: Urgent Matter.</p> <p>Message:</p> <p>Please call.</p> <p>Taken By: Steve Message ID: 280</p>	<input checked="" type="checkbox"/> Phoned	<input checked="" type="checkbox"/> No action required	<input type="checkbox"/> Wants to see you	<input type="checkbox"/> Returned your call	<input type="checkbox"/> Please phone	<input type="checkbox"/> Will Be In At:	<input type="checkbox"/> Came to see you	<input type="checkbox"/> Will phone again		<input type="checkbox"/> Urgent	<input type="checkbox"/> Will drop by again	<input type="checkbox"/> Private
<input checked="" type="checkbox"/> Phoned	<input checked="" type="checkbox"/> No action required	<input type="checkbox"/> Wants to see you																							
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<input type="checkbox"/> Phoned	<input type="checkbox"/> No action required	<input type="checkbox"/> Wants to see you																							
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<input type="checkbox"/> Came to see you	<input checked="" type="checkbox"/> Will phone again																								
<input type="checkbox"/> Urgent	<input type="checkbox"/> Will drop by again	<input type="checkbox"/> Private																							

Printed at 11:03:43 AM on 20/01/2016 PhonePad Version 5.0.0

Image: Phone Message Form - 4 Messages per Page

While You Were Out

Message ID: 588

To: Andrew

Date: 20/05/2016 10:27 PM

Caller: Jennifer Anderson

Company: Wilson Group

Phone: 555 6666

Details: Phoned

Action: No Action Required

Subject: Quotation.

Message:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas at leo eget nisl porta viverra. Ut laoreet, dui at tempus vestibulum, eros leo egestas neque, id adipiscing odio eros et lectus. Vivamus pretium lorem sit amet nulla. Praesent nec dolor at augue ultrices blandit. Quisque aliquet ultrices mi.

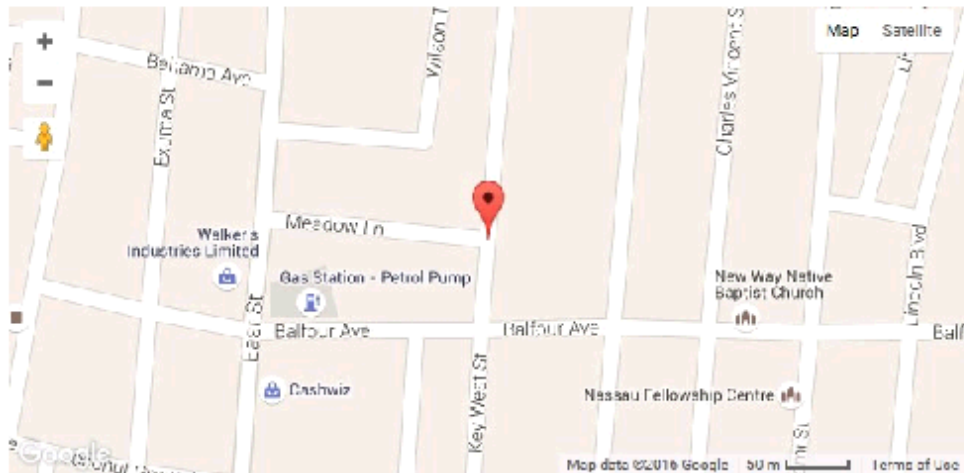
Urgent

Private

Receipt

Will be in at:

Address: 54 Key West Street, Nassau , The Bahamas



Printed at 10:59:25 PM on 20/05/2016

PhonePad 5

Image: Phone Message with Address and Map

Quick Print

Quick Print prints selected messages in a different format than the other reports. To use Quick Print, click on the **Quick Print** button on the **Home** tab of the toolbar, or select **Quick Print** from the **File** menu.



The Quick Print preview window will be displayed.

XYZ Corporation

Quick Print Report of Inbox Messages

Msg ID:	207	Date:	25/09/2015 8:40 AM
To:	Steve	Company:	Mathews Limited
Caller:	Abby Brock	Action:	No Action Required
Details:	Phoned	Urgent:	No
Subject:	New call from Abby.		
Message:	This is a test message for Abby Brock.		

Msg ID:	269	Date:	8/12/2015 10:20 AM
To:	Steve	Company:	Mathews Limited
Caller:	Abby Brock	Action:	No Action Required
Details:	Phoned	Urgent:	No
Subject:	Tuesday Meeting		
Message:	This is a test message for auto forwarding.		

Msg ID:	275	Date:	20/01/2016 11:17 AM
To:	steve	Company:	Mathews Limited
Caller:	Abby Brock	Action:	Please Phone
Details:	Returned Your Call	Urgent:	No
Subject:	Golf on Thursday?		
Message:	Abby rang to see if you are still up for a game of golf on Thursday.		

Printed on 26/01/2016 at 12:16:48 PM		PhonePad 5	
Page 1 of 2 Pages			

Print Message List

The Print Message List option allows you to print a list of all messages in the current folder. To print a list of messages, click on the **Print Message List** button on the **Home** tab of the toolbar, or select **Print Message List** from the **File** menu.



All of the messages will be printed one per line with the Read status and Follow Up status.

XYZ Corporation							
Inbox Message List							
Read	Type	Followup	ID	Date	Caller	Phone	Subject
Y	Receipt		183	26/09/2015 2:17 PM			RECEIPT: Hello
Y	Phone		207	26/09/2015 8:40 AM	Abby Brock	8171612	New call from Abby.
Y	Receipt		233	10/11/2015 2:30 PM	-----	-----	RECEIPT: Documents for XYZ Corp.
Y	Phone		239	23/09/2015 5:46 PM	Jacklyn Reese	5602366	Enquiry
Y	Phone		244	26/09/2015 4:56 PM	Yesenia Mcpherson	7691174	A few questions
N	Phone		251	27/09/2015 3:33 PM	Abby Brock	8171612	Documents.
Y	Phone		256	27/09/2015 3:51 PM	Abby Brock	8171612	Re: Documents
N	Phone	Follow Up	265	12/11/2014 10:21 PM	Yesenia Travis	7926422	Archive and Unarchive Test.
Y	Phone		269	8/12/2015 10:20 AM	Abby Brock	8171612	Tuesday Meeting.
Y	Phone	Follow Up	275	20/01/2016 11:17 AM	Abby Brock	8171612	Golf on Thursday?
Y	Phone		280	20/01/2016 8:26 PM	Abby Brock	8894563	Urgent Matter.
Y	Text	Follow Up	282	20/01/2016 9:50 PM			Test Message.
Y	Phone		286	21/01/2016 8:17 AM	Abby Brock	8171612	Test
Y	Text		288	21/01/2016 9:38 AM			fw: Phone Message.
Y	Receipt		291	21/01/2016 3:59 PM	-----	-----	RE: System Issues.
Y	Phone	Completed	299	24/01/2016 10:49 AM	Abby Brock	8171612	Important Message.
Y	Phone		302	24/01/2016 10:58 AM	Aaron Wheeler	9763046	RE:

Printed on 26/01/2016 at 12:26:38 PM

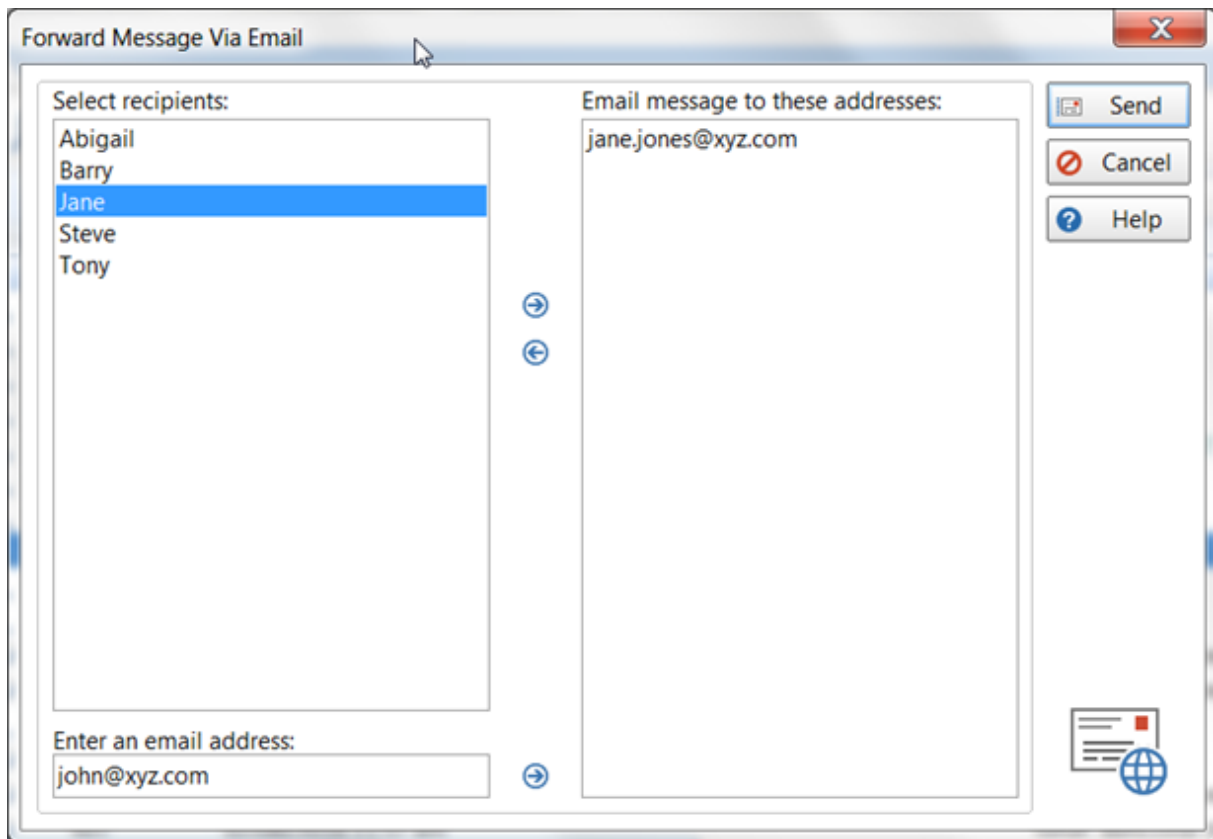
PhonePad 5

Page 1

Emailing Messages

There is an option that allows you to email a message to one or more people, as long as your PhonePad administrator has set this up.

Select the message you want to send by email, then select **Email Message** from the **File** menu, or click the **Email Message** button on the **Home** toolbar.



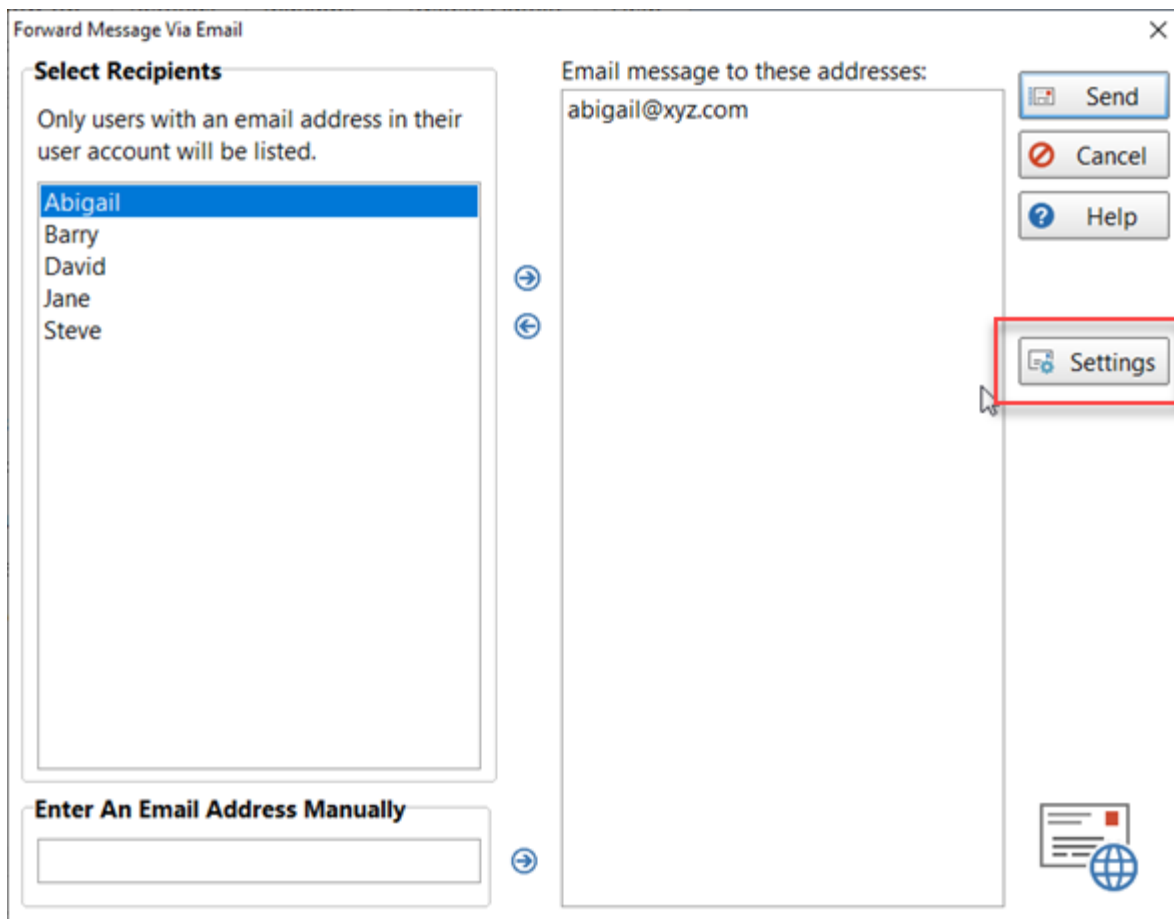
The **Select Recipients** list will only show PhonePad users that have an email address. To send an email to one or more of these users, you need to add them to the **Email messages to these addresses** list. You can do this by double-clicking on their name, or by selecting them and clicking the right-arrow button, or by dragging and dropping.

To remove someone from the list, double-click on their name, or by select them and click the right-arrow button, or by drag and drop them back to the list on the left.

You can also enter a person's email address under **Enter an email address** and add them to the list by clicking the right-arrow button.s

Email Message Settings

If you have administrator access, a **Settings** button will also be displayed on this screen.



Click the **Settings** button to access the settings used by the **Email Message** feature to send emails.

When the **Email Message Settings** screen appears, you have the option of using the settings set up under **Communication Settings** (the default), or to set up specific email settings for the **Email Message** feature (**Use Mail Server**).

If you want the Email Message feature to use separate settings then select **Use Mail Server**.

Enter the address of your **SMTP Server** and the **SMTP Port** number.

To make things easier, you can use the drop-down list to select an email service provider, then click the **Apply Preset** button (if your provider is listed). This will change the settings to suit the provider you are using. All you need to do then is enter your account details (eg. Account Username/Email Address and Password).

These are settings we have tested, or that have been tested by customers, and are known to work. More presets will be added over time. If you are using an email provider not listed and you have settings that have been proven to work, please let us know and we'll add them.

Email Message Settings

Configure how the **Email Message** feature sends emails. You can use the same settings as the **Automatic Message Forwarding** feature under **Communication Settings** or you can configure a separate mail system.

Use Communication Settings
 Use Mail Server

OK
Cancel
Help

SMTP Server Mail User Account Authentication

SMTP Server: smtp.xyzcorp.com

SMTP Port: 465

Use an email service preset: Apply Preset

Select the **Mail User Account** tab and enter in the details.

Email Message Settings

Configure how the **Email Message** feature sends emails. You can use the same settings as the **Automatic Message Forwarding** feature under **Communication Settings** or you can configure a separate mail system.

Use Communication Settings
 Use Mail Server

SMTP Server **Mail User Account** Authentication

Email Account

Account Username: phonepad@xyzcorp.com ⓘ ↓

Account Password: ●●●●●●

Confirm Password: ●●●●●●

Username and Password Not Required

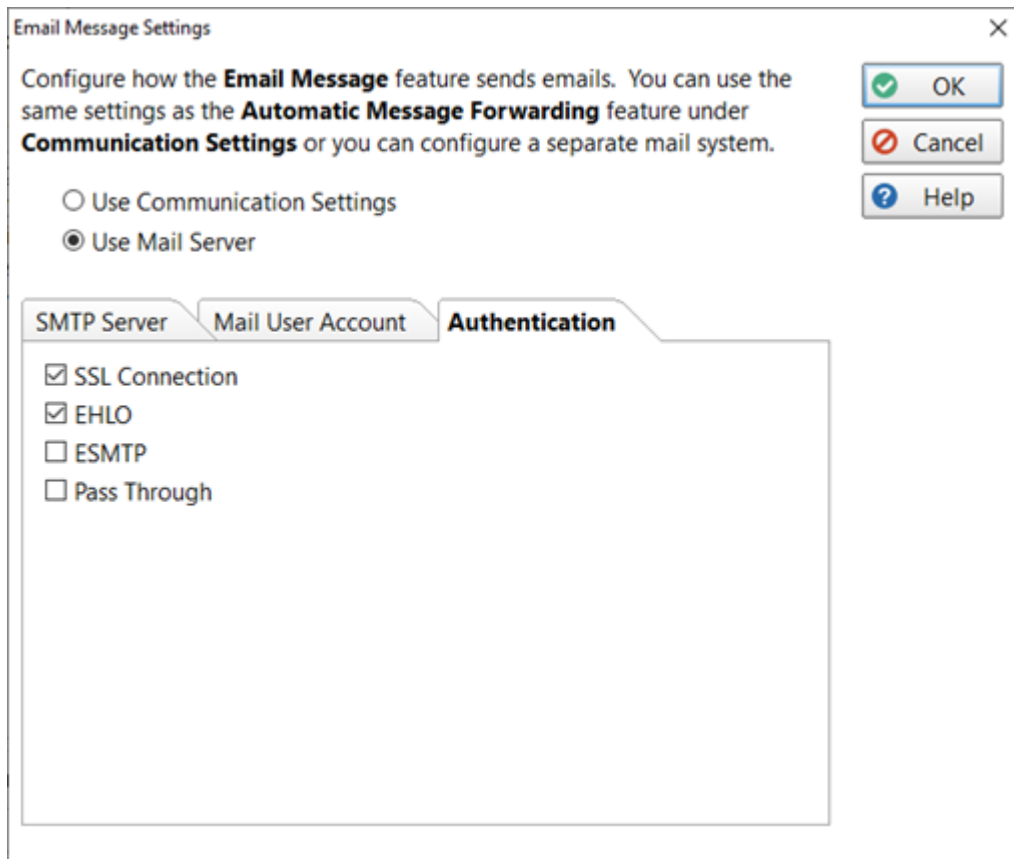
Sender Details

Sender Name: PhonePad

Sender Email: phonepad@xyzcorp.com

OK Cancel Help

Finally, select the **Authentication** tab and select the appropriate authentication settings for your mail server.



Click **OK** to save the changes.

Chapter

4

Short Messages

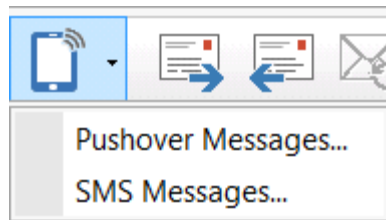
Short Messages

Short Messages are text messages sent directly to users or contacts using either Pushover or SMS (Short Message Service). They are unrelated to phone messages you log.

The **Pushover** option is intended for sending messages to staff as the recipient of the message must have the Pushover application installed on their mobile device, and they need to be connected under the same Pushover account.

The **SMS** option enables you to send messages to clients as it uses the cell network.

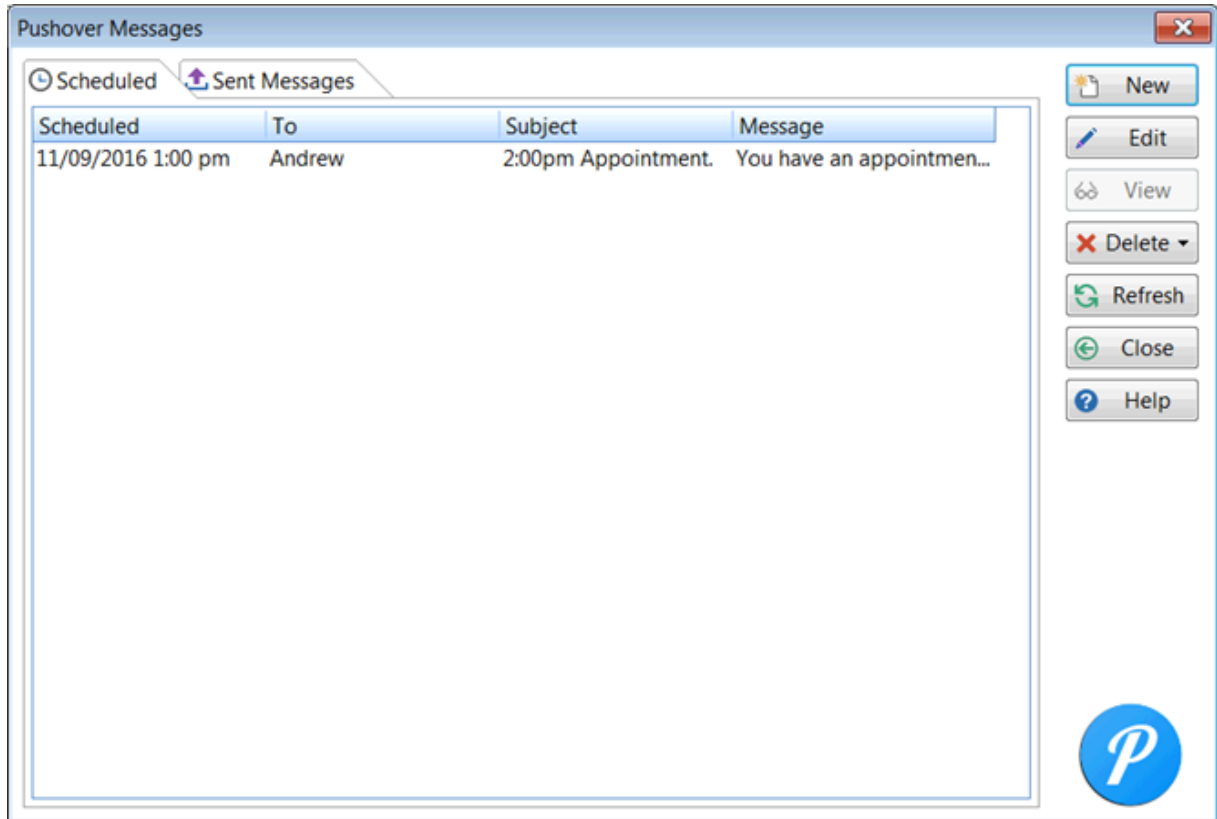
To access the **Short Messages** options, click on the **Short Messages** button on the toolbar, or select **Short Messages** from the **Tools** menu, then select **Pushover Messages** or **SMS Messages**.



If the options aren't enabled then you will need to get your PhonePad Administrator to give you access.

Pushover Messages

The Pushover Messages window has two tabs: one for scheduled messages and another tab shows all messages that have been sent for the logged in user.



New	Click to create a new scheduled or unscheduled message.
Edit	Click to edit a scheduled message.
View	Click to view a sent message.
Delete	Click to display a drop-down menu where you can delete a selected message or all messages.
Refresh	Refresh the list of messages.
Close	Click to close this window.
Help	Display help.

Sending a Pushover Message

To send a Pushover message:

1. Click the **New** button.

New Pushover Message

Send To: Abigail
 Adam
 Amy
 Andrew
 Jen
 Tony

Send

Cancel

Subject: Pickup.

Message: Could you please pickup a parcel from |


Priority: Normal

Sound: Bugle

Scheduled Sending

11/05/2016 6:30 PM

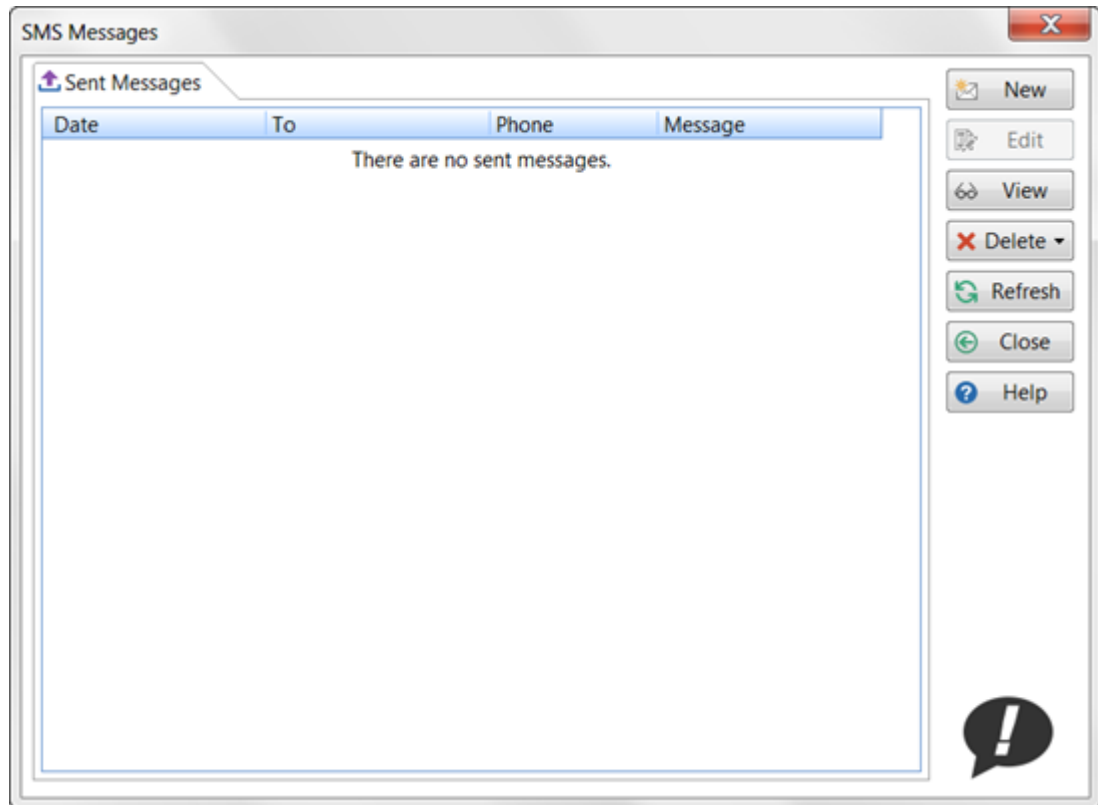
Sender: Billie



2. Select the users you want to send the message to (messages can be sent to multiple users).
3. Enter a **Subject** (optional).
4. Enter your **Message**.
5. You can select the **Priority** of the message. The default is **Normal**.
6. Although users can set the default notification sound on their mobile devices, you can override the sound by selecting a **Sound** from the drop-down menu.
7. If you don't want to send the message straight away you can schedule it for a later date and time. Just check the **Scheduled Sending** check box, and then enter a date and time.
8. Click **Send** to send the message. If this is a scheduled message then it will appear in the list of scheduled messages.

SMS Messages

When you select **SMS Messages**, the following window will be displayed.

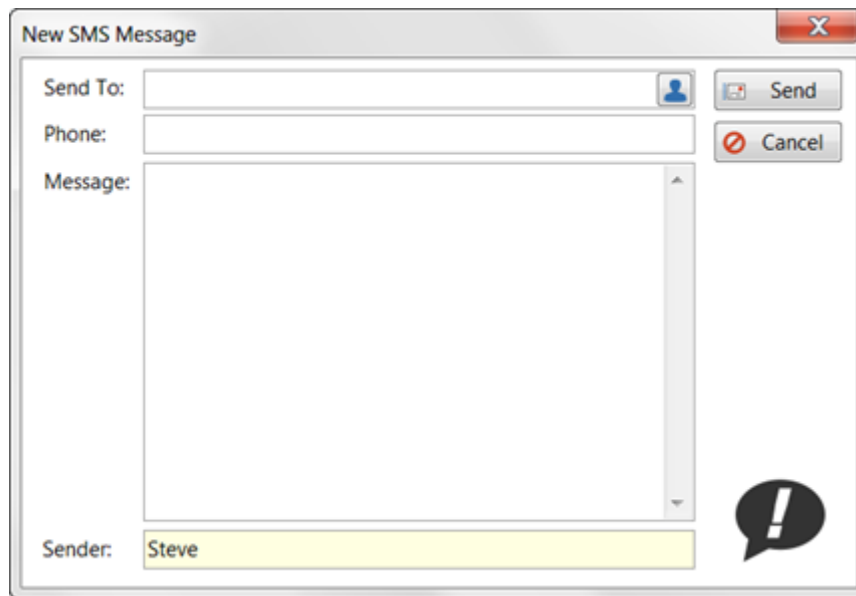


New	Click to create a new scheduled or unscheduled message.
Edit	Will be used for editing scheduled messages when this feature becomes available.
View	Click to view a sent message.
Delete	Click to display a drop-down menu where you can delete a selected message, or all messages.
Refresh	Refresh the list of messages.
Close	Click to close this window.
Help	Display help.

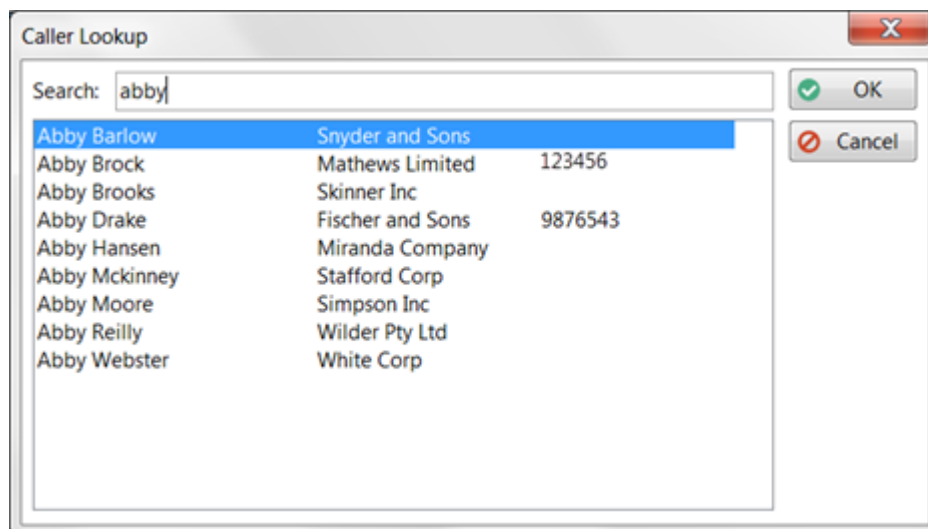
Sending an SMS Message

To send an SMS message:

1. Click the **New** button.
2. The **New SMS Message** window will be displayed
3. Click on the small icon to the immediate right of the **Send To** field.

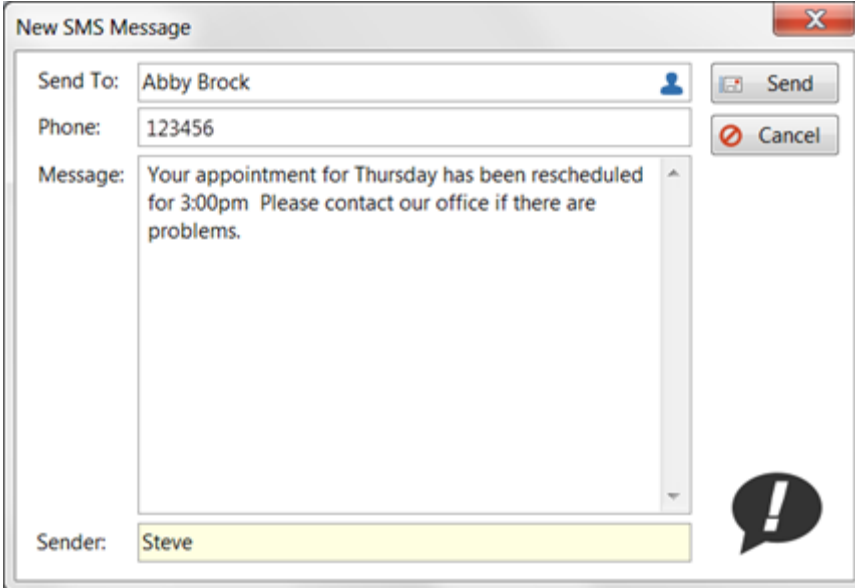


4. The **Caller Lookup** window will open. As you enter text into the **Search** field it will perform an incremental search of all callers in your Address Book.



5. When you have found the person you were looking for, select them and click **OK**.

- You will be taken back to the **New SMS Message** window. Enter the text of your message and then click the **Send** button.



New SMS Message

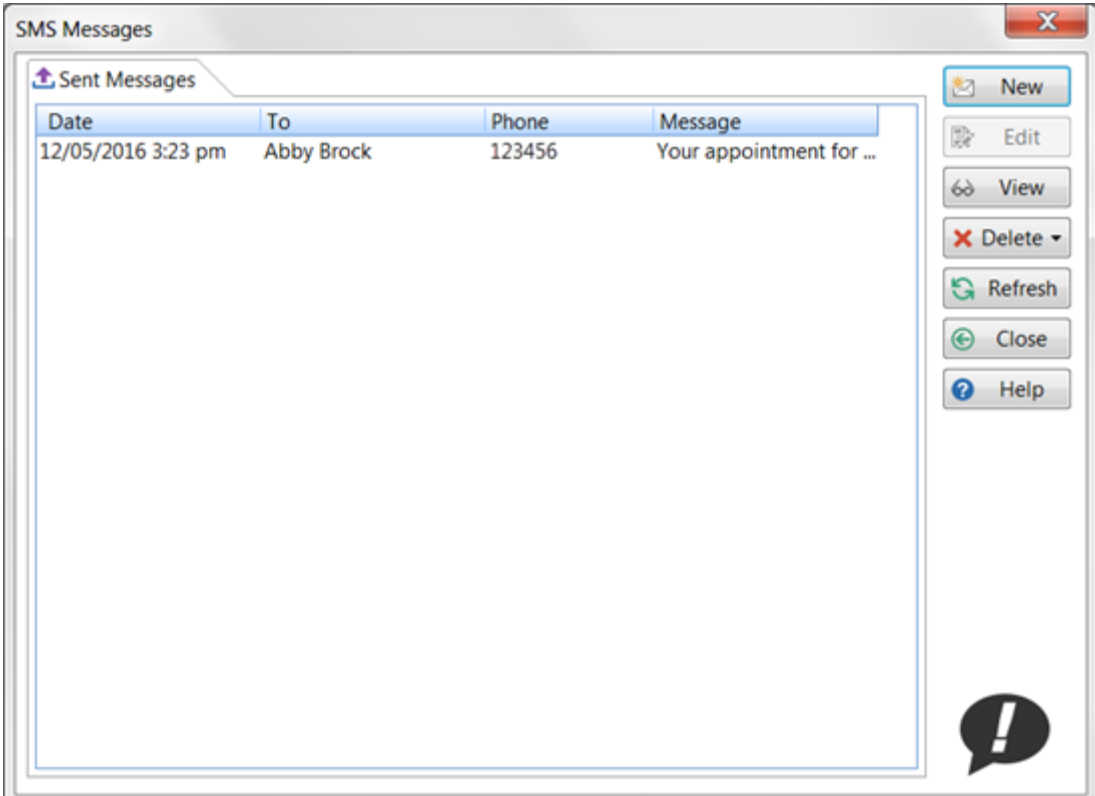
Send To: Abby Brock

Phone: 123456

Message: Your appointment for Thursday has been rescheduled for 3:00pm Please contact our office if there are problems.

Sender: Steve

- The SMS message will be sent right away and the message you sent will be displayed in the list of sent messages.



SMS Messages

Sent Messages

Date	To	Phone	Message
12/05/2016 3:23 pm	Abby Brock	123456	Your appointment for ...

New

Edit

View

Delete

Refresh

Close

Help

Chapter

5

Folders

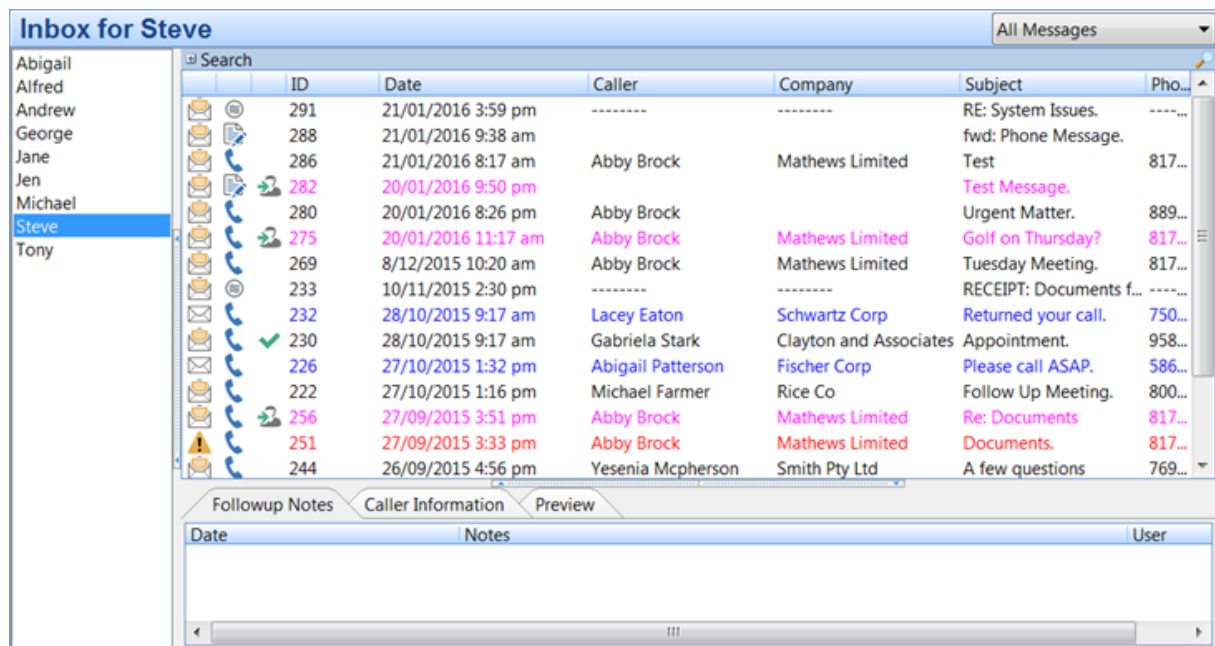
Folders

Your messages in PhonePad 5 are organized into a number of folders: **Inbox**, **Outgoing**, **Sent** and **Deleted**. You can also create your own **Personal** and **Public** folders, and your administrator can set up **Group** folders that you can be given access to.

All of these are displayed in the Folder Tree.

Inbox

The Inbox is a special folder. This is where all of your phone and text messages will arrive when someone sends them to you.



The User List

If you have access to other users' Inboxes you will also see a list of those users to the left of your Inbox. You can select a user from the list to access their Inbox. The Inbox title bar will display the name of the user whose Inbox you are viewing.

Message Counts

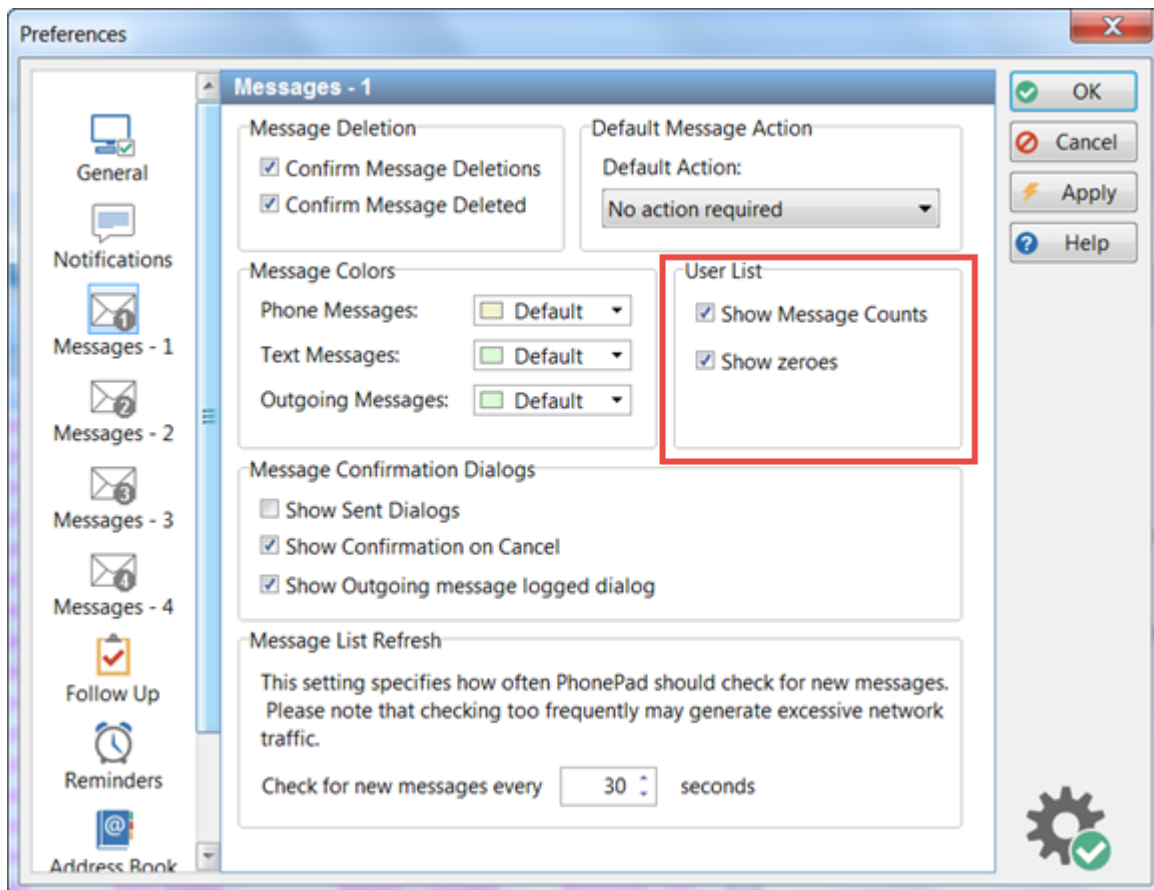
The User list can be configured to show message counts for each user. The first column is the number of unread messages for the user, and the second column shows the number of uncompleted follow ups.

Inbox for Steve		
Abigail	10	6
Andrew	32	17
George	2	1
Jen	1	1
Barry	1	0
Amy	1	0
Catherine	0	0
Bill	0	0
Rachel	0	0
Steve	40	22

Uncompleted Follow Ups

Unread Messages

To configure this, select **Preferences** from the **View** menu, then select **Messages - 1**.

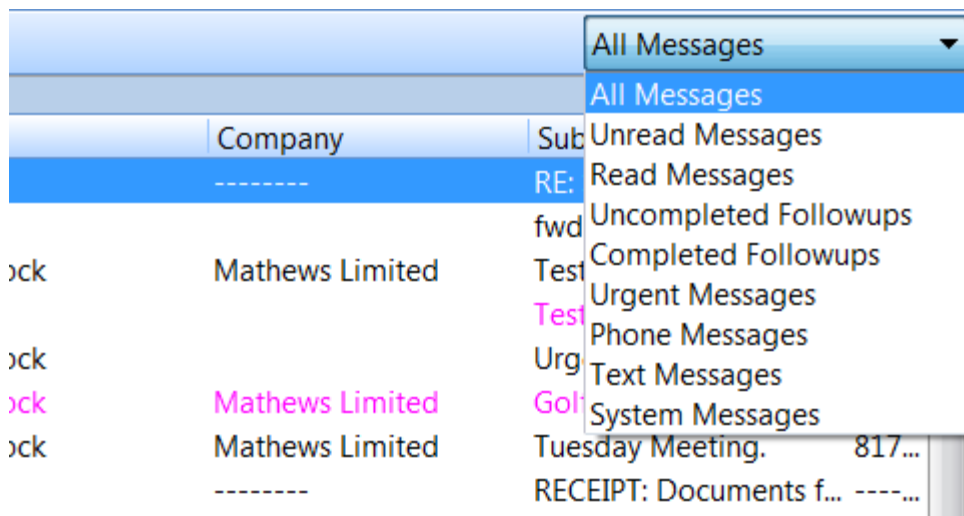


User List	
Show Message Counts	When checked, the User List will display message counts for Unread Messages and Uncompleted Follow Ups.
Show Zeroes	When checked, and Show Message Counts is checked as well, zeroes will be displayed where the user has no Unread Messages and/or Uncompleted Follow Ups. If unchecked, blank spaces will be shown instead of zeroes.

Message Filtering

The Inbox has a special option that none of the other folders have. It has the ability to filter messages, showing only the messages you want to see.

You can filter the Inbox by selecting a filter from the **Message Filter** menu.

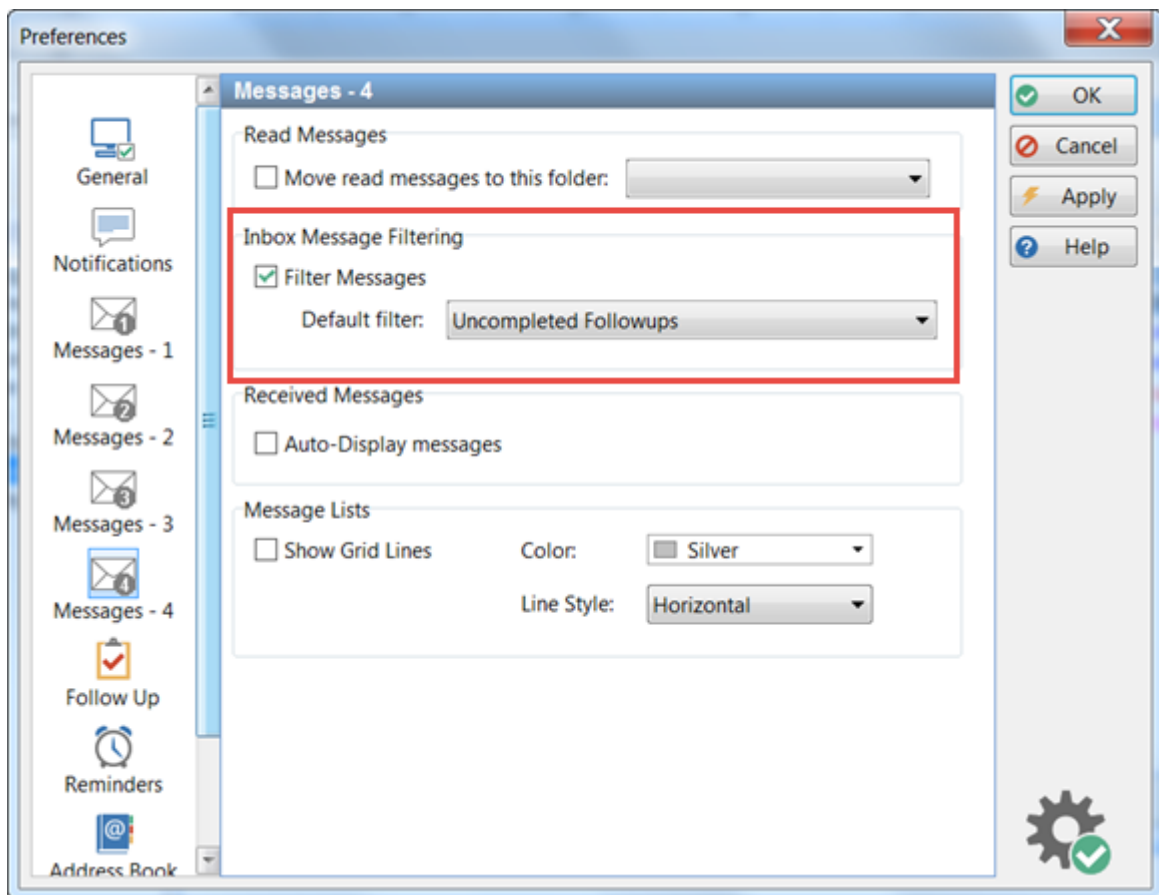



You can also choose a filter by selecting **Inbox Filtering** from the **File** menu. In this example only unread messages are displayed.



You can tell PhonePad to default to one of the filters on startup. For instance some users prefer to see only new messages on startup, or they want to see the messages they have to follow up first.

You can set a default filter by selecting **Preferences** from the **Tools** menu, and then selecting **Messages-4**. Check the **Filter Messages** check box and then select a default filter to use.

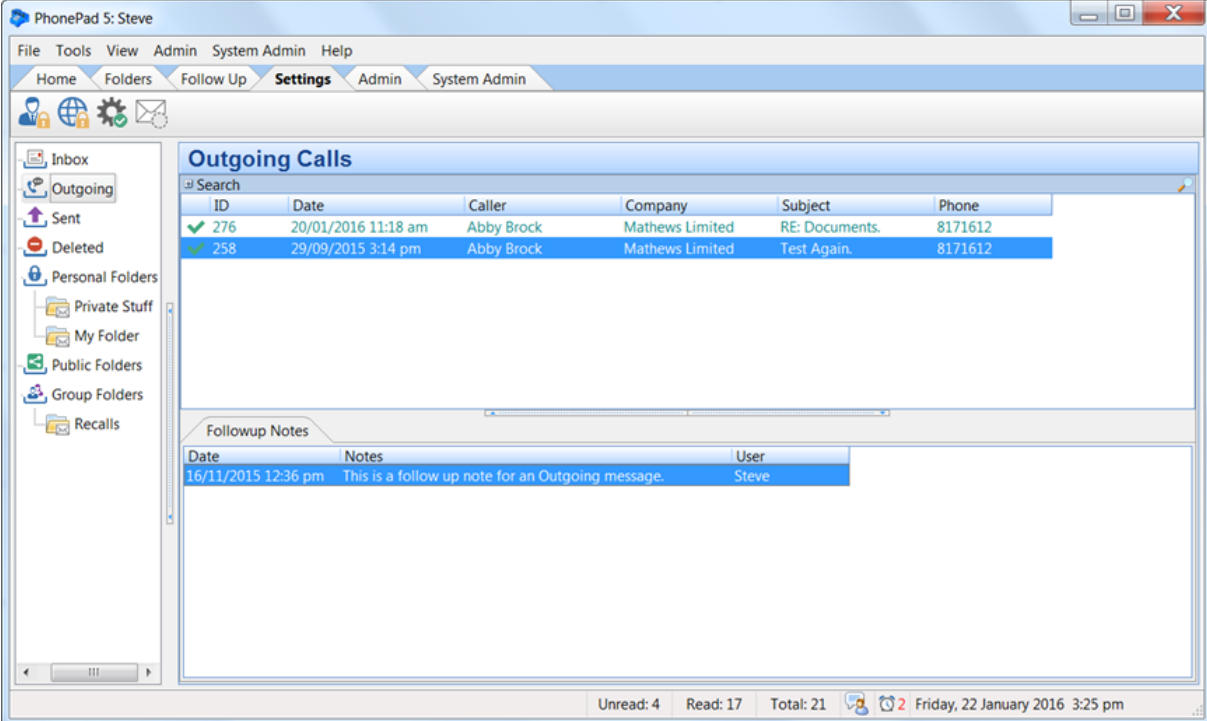


 There is a quick and easy way to filter messages by Unread Messages, Read Messages and All Messages. In the status bar it shows how many Unread and Read messages there are in your Inbox, as well as the total number of messages. You can click any of these to apply the relevant filter.

Unread: 4 Read: 17 Total: 21   2 Friday, 22 January 2016 3:04 pm

Outgoing Folder

All of your Outgoing call messages are stored in the Outgoing folder.





Outgoing Calls

ID	Date	Caller	Company	Subject	Phone
276	20/01/2016 11:18 am	Abby Brock	Mathews Limited	RE: Documents.	8171612
258	29/09/2015 3:14 pm	Abby Brock	Mathews Limited	Test Again.	8171612

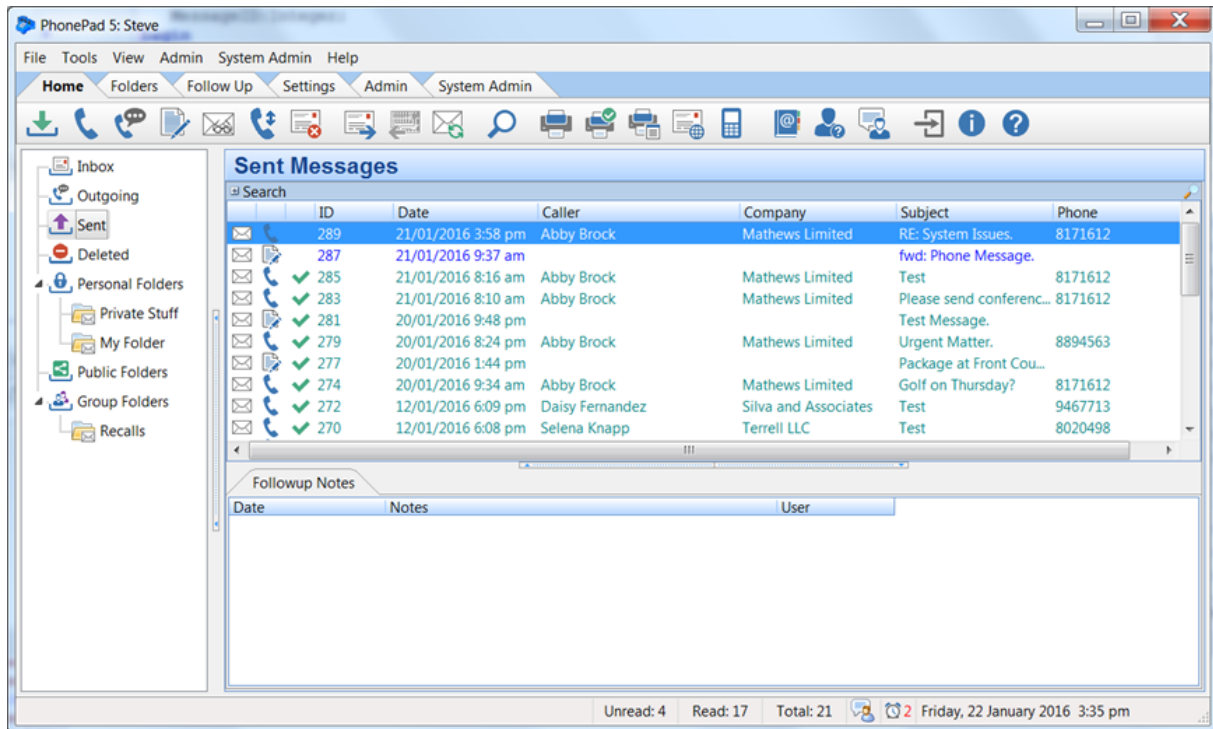
Followup Notes

Date	Notes	User
16/11/2015 12:36 pm	This is a follow up note for an Outgoing message.	Steve

Unread: 4 Read: 17 Total: 21   2 Friday, 22 January 2016 3:25 pm

Sent Folder

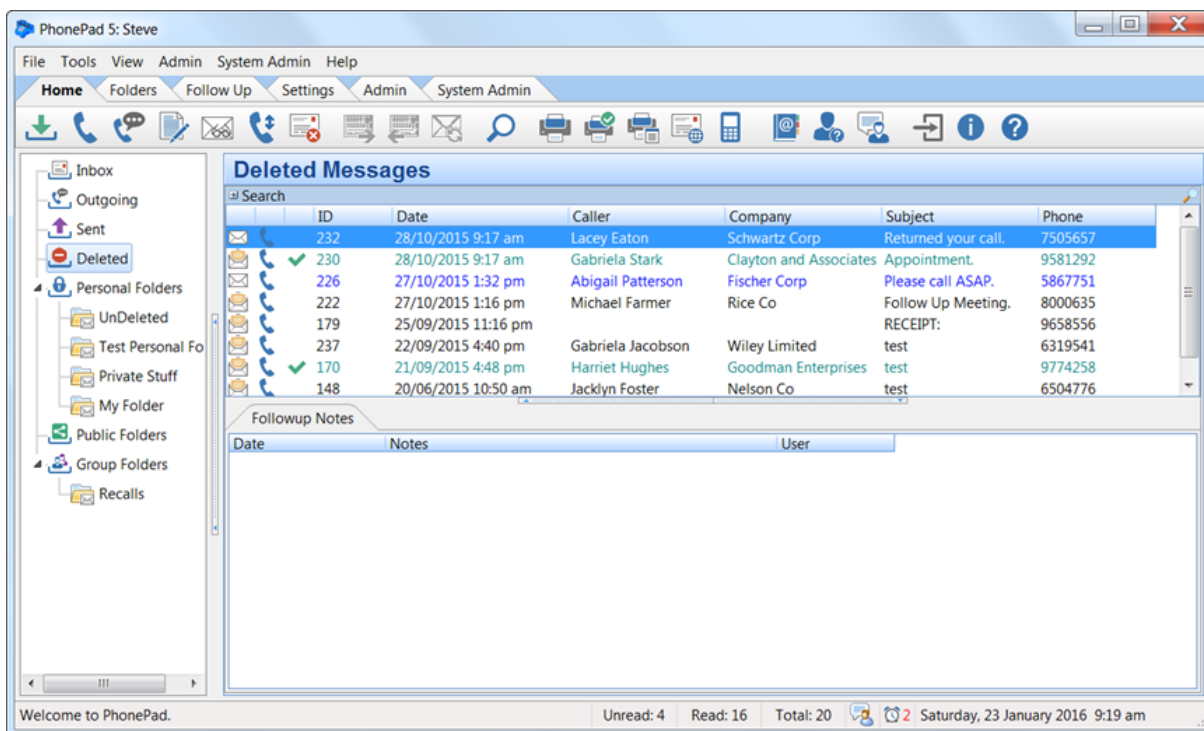
Whenever you send a message to someone in PhonePad, it keeps a record of the message. These messages are stored in your **Sent** folder.



These messages can be forwarded to someone else, or you can resend a message you've sent before.

Deleted Folder

Every time you delete a message in PhonePad it winds up in the **Deleted** folder. Think of it as a trash can or rubbish bin. Messages stay in there until someone empties the bin, or until the system automatically empties it for you.



You can undelete messages in the **Deleted** folder.

You can also delete messages in the **Deleted** folder. A word of warning though: messages deleted from the Delete folder are **permanently** deleted. There is no way to retrieve them once you have done this.

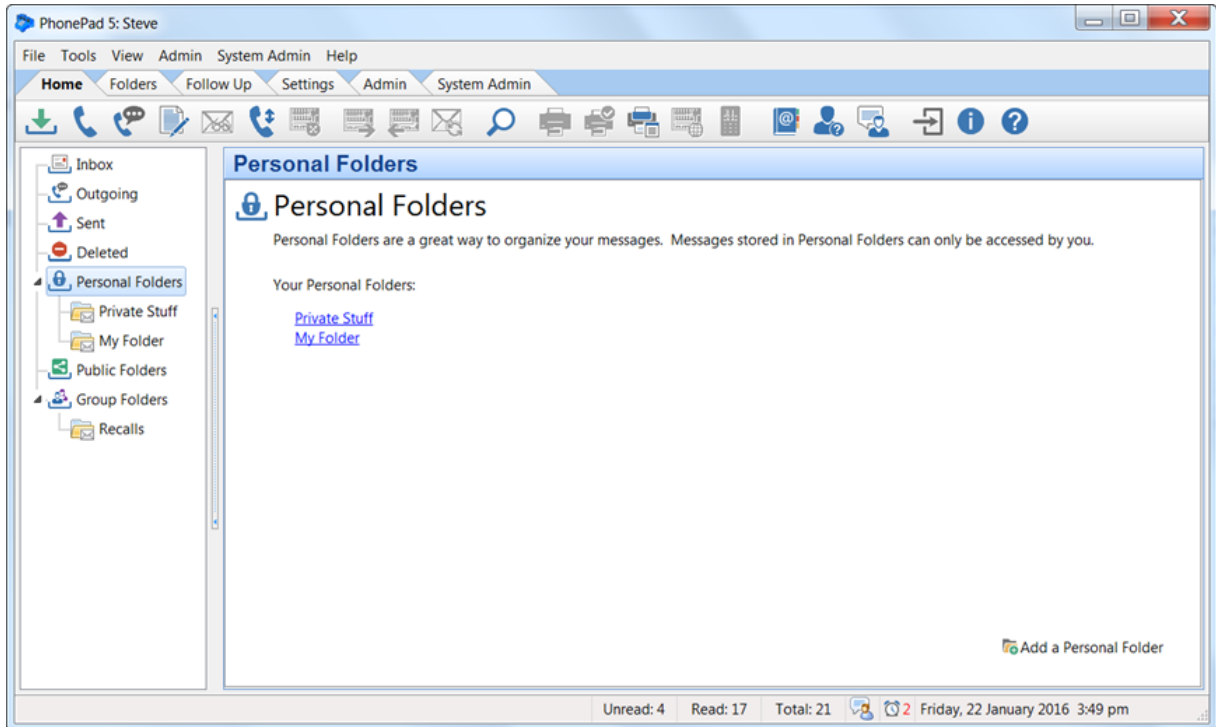
If you decide that you need to retrieve a deleted message, you have up to 14 days to undelete it. The server will automatically deletes messages that have been in **Deleted** folders for more than 14 days.



When you undelete a file it is returned to the folder it was deleted from. However, in the case of **Personal** and **Public** folders, if the folder has been deleted then there is nowhere for them to return to. In this situation PhonePad will automatically create a folder called **Undeleted** and place the messages there.

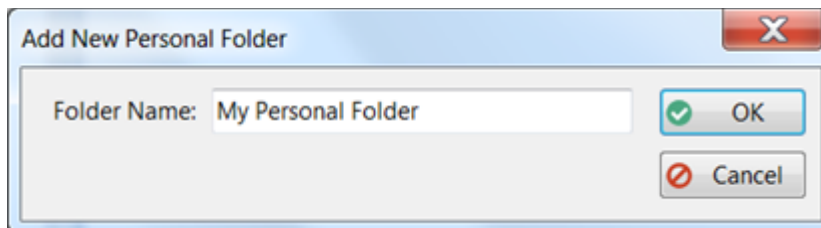
Personal Folders

Personal Folders can be used to organize your messages. Once you have finished with a message in your Inbox you can move it to a personal folder so that you can access it in the future.



Adding a Personal Folder

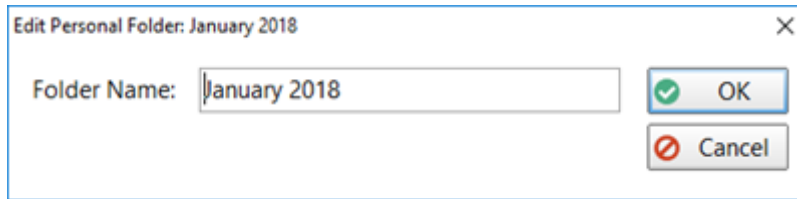
Select **Personal Folders** in the folder tree and click the **Add a Personal Folder** link, or select the **Folders** tab on the toolbar and select **Add New Folder**, or right-click on **Personal Folders** in the folder tree and select **Add Folder** from the popup menu.



Enter a name for the folder and then click **OK**.

Editing a Personal Folder

Right-click on the folder in the folder tree, then select **Edit Folder** from the popup menu, or double-click on the folder in the folder tree, or select the **Folders** tab on the toolbar and select **Edit Folder**.

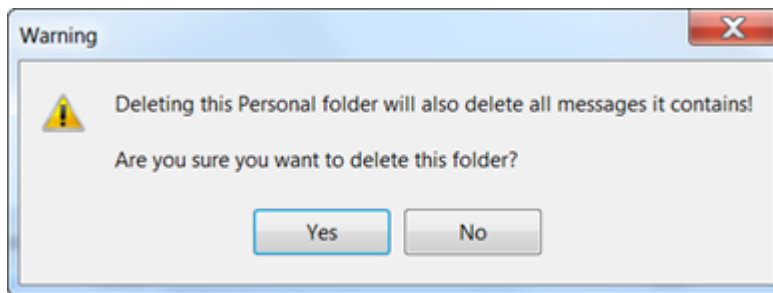


Click **OK** to save your changes.

Deleting a Personal Folder

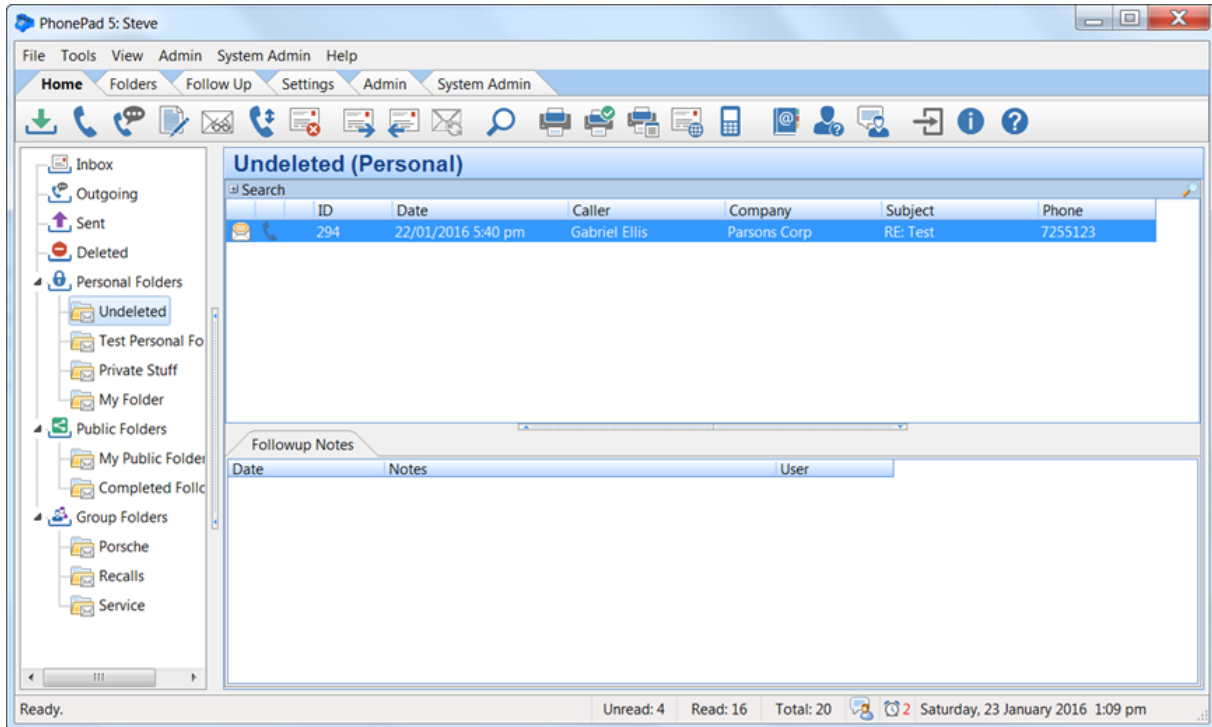
Right-click on the folder in the folder tree, then select **Delete Folder** from the popup menu, or select the **Folders** tab on the toolbar and select **Delete Folder**.

You will be asked to confirm the deletion.



Any messages in the folder will also be deleted. The deleted messages will appear in the **Undeleted** folder.

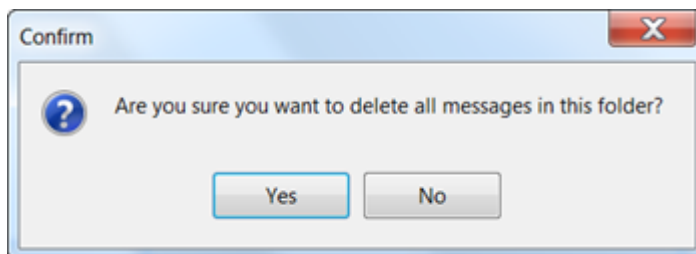
If you decide to undelete messages that were previously in a folder that has been deleted, the messages will be added to a Personal folder called **Undeleted**. If the folder doesn't exist then PhonePad will automatically create it.



Emptying a Personal Folder

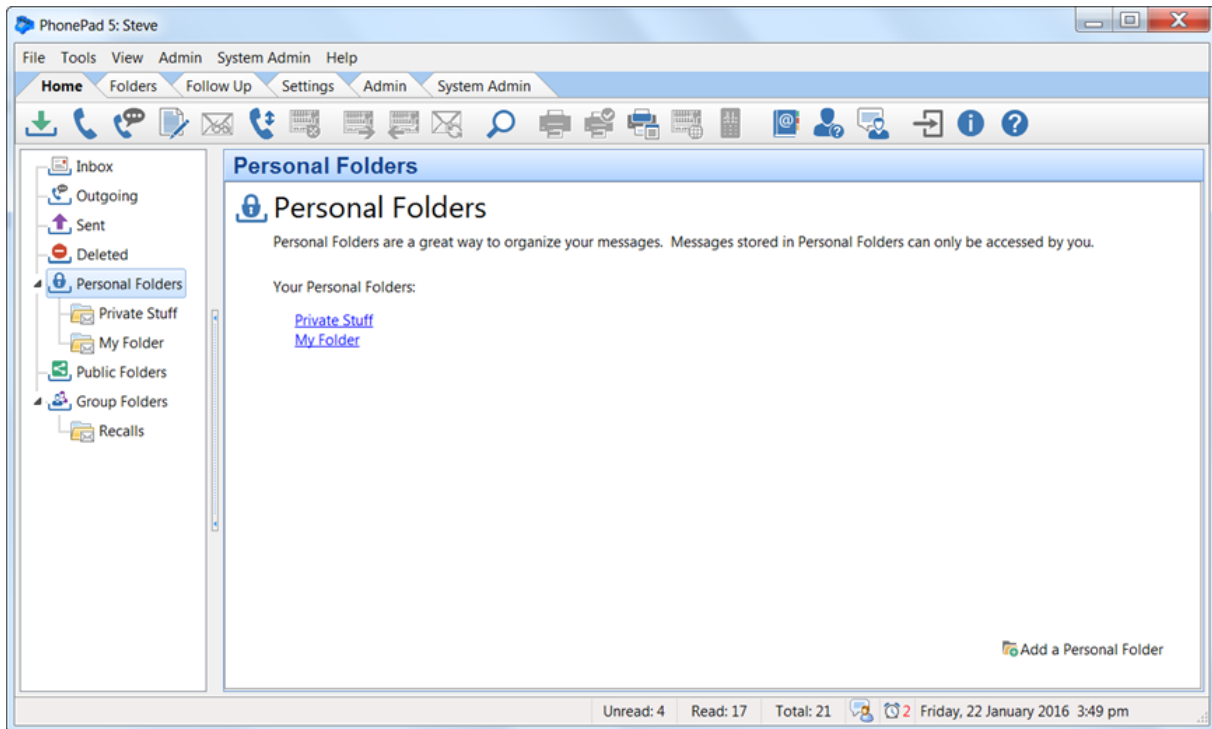
If you want to delete all messages in a Personal folder, right-click on the folder in the folder tree, then select **Empty Folder** from the popup menu, or select the **Folders** tab on the toolbar and select **Empty Folder**.

You will be asked to confirm the deletion.



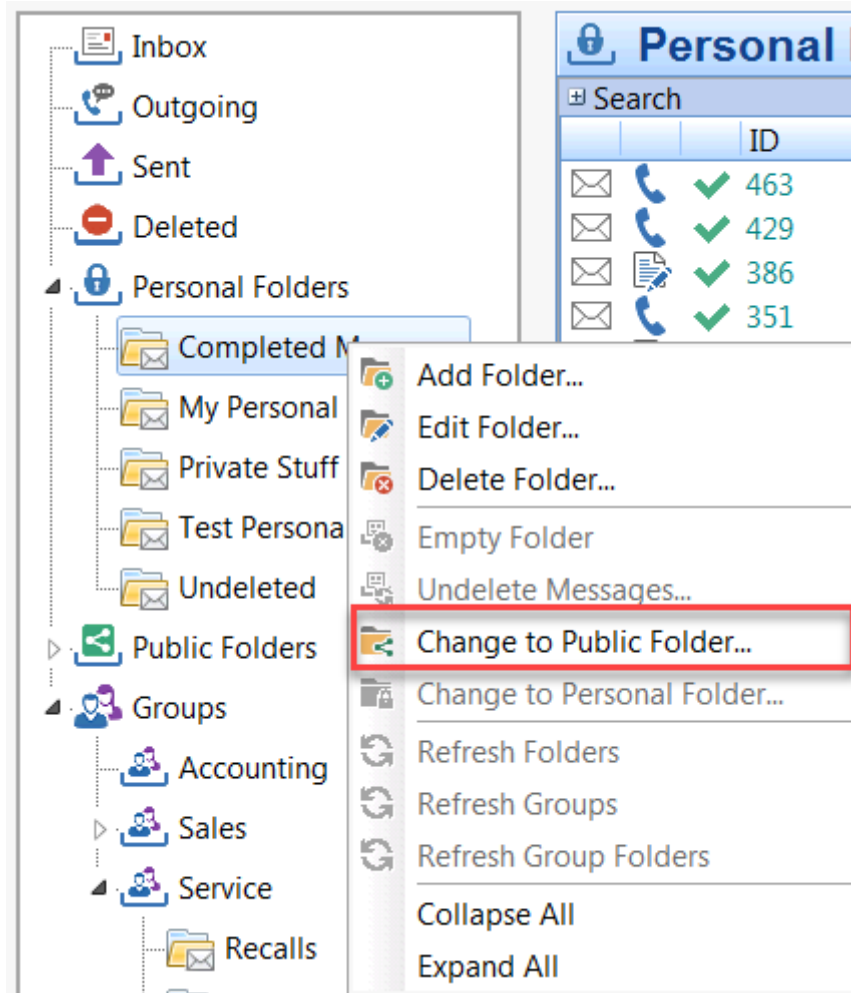
Accessing a Personal Folder

You can access your Personal folders by selecting the folder from the folder tree, or by clicking the link for the folder on the Personal Folders home page.



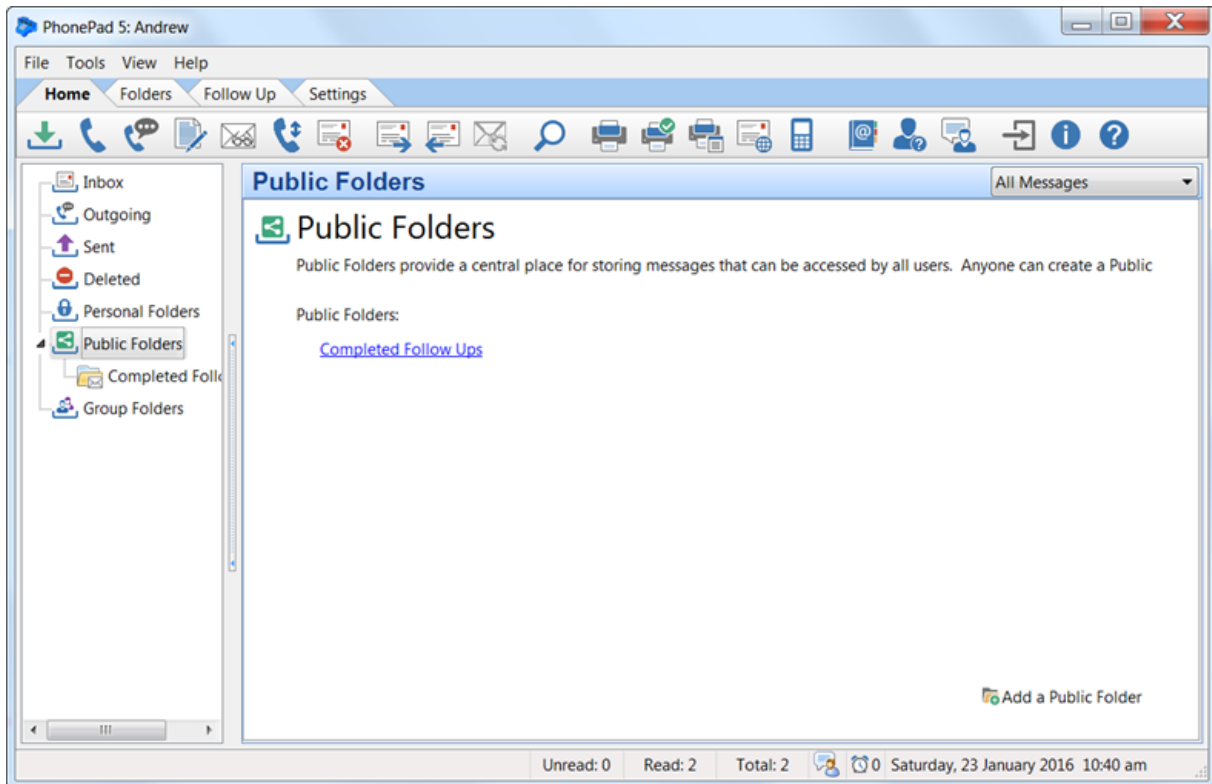
Changing a Personal Folder to a Public Folder

You can easily change a Personal Folder to a Public Folder by right-clicking on the Personal Folder and then selecting **Change to Public Folder** from the popup menu.



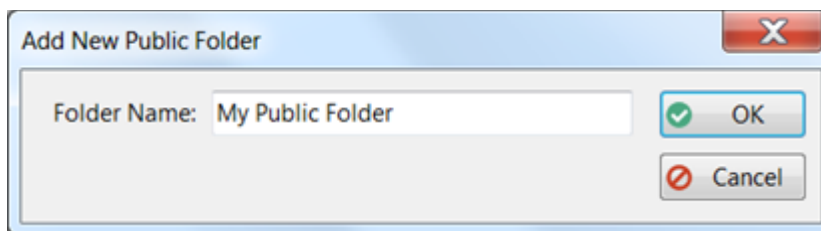
Public Folders

As the name suggests, Public folders are accessible by any PhonePad user. Public folders are used to store messages that can be accessed by everyone.



Adding a Public Folder

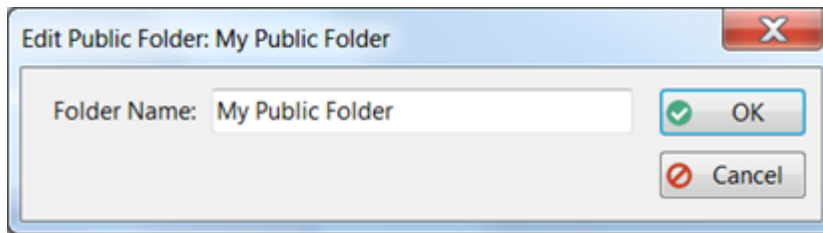
Select **Public Folders** in the folder tree and click the **Add a Public Folder** link, or select the **Folders** tab on the toolbar and select **Add New Folder**, or right-click on **Public Folders** in the folder tree and select **Add Folder** from the popup menu.



Enter a name for the folder and then click **OK**.

Editing a Public Folder

Right-click on the folder in the folder tree, then select **Edit Folder** from the popup menu, or double-click on the folder in the folder tree, or select the **Folders** tab on the toolbar and select **Edit Folder**.

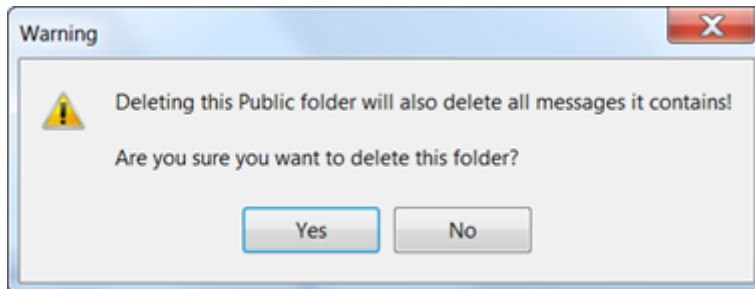


Click **OK** to save your changes.

Deleting a Public Folder

Right-click on the folder in the folder tree, then select **Delete Folder** from the popup menu, or select the **Folders** tab on the toolbar and select **Delete Folder**.

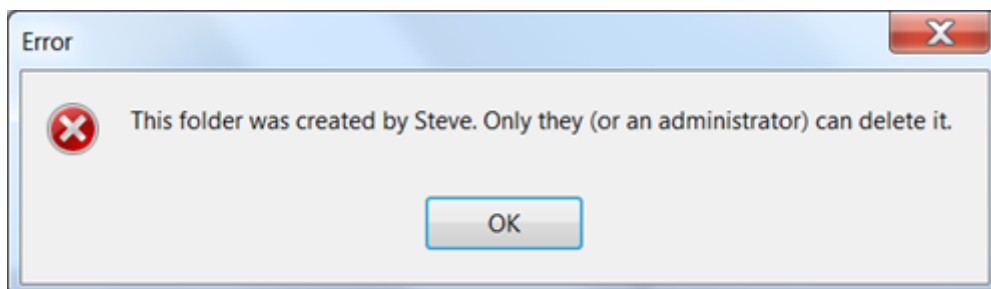
You will be asked to confirm the deletion.



Any messages in the folder will also be deleted. The deleted messages will appear in the **Undeleted** folder.

If you decide to undelete messages that were previously in a folder that has been deleted, the messages will be added to a Personal folder called **Undeleted**. If the folder doesn't exist then PhonePad will automatically create it.

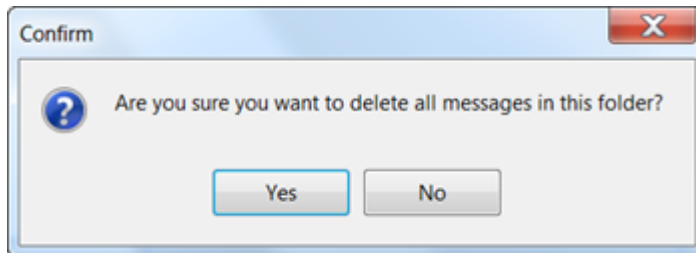
If you didn't create the Public folder then you will not be able to delete it, unless you are an administrator.



Emptying a Public Folder

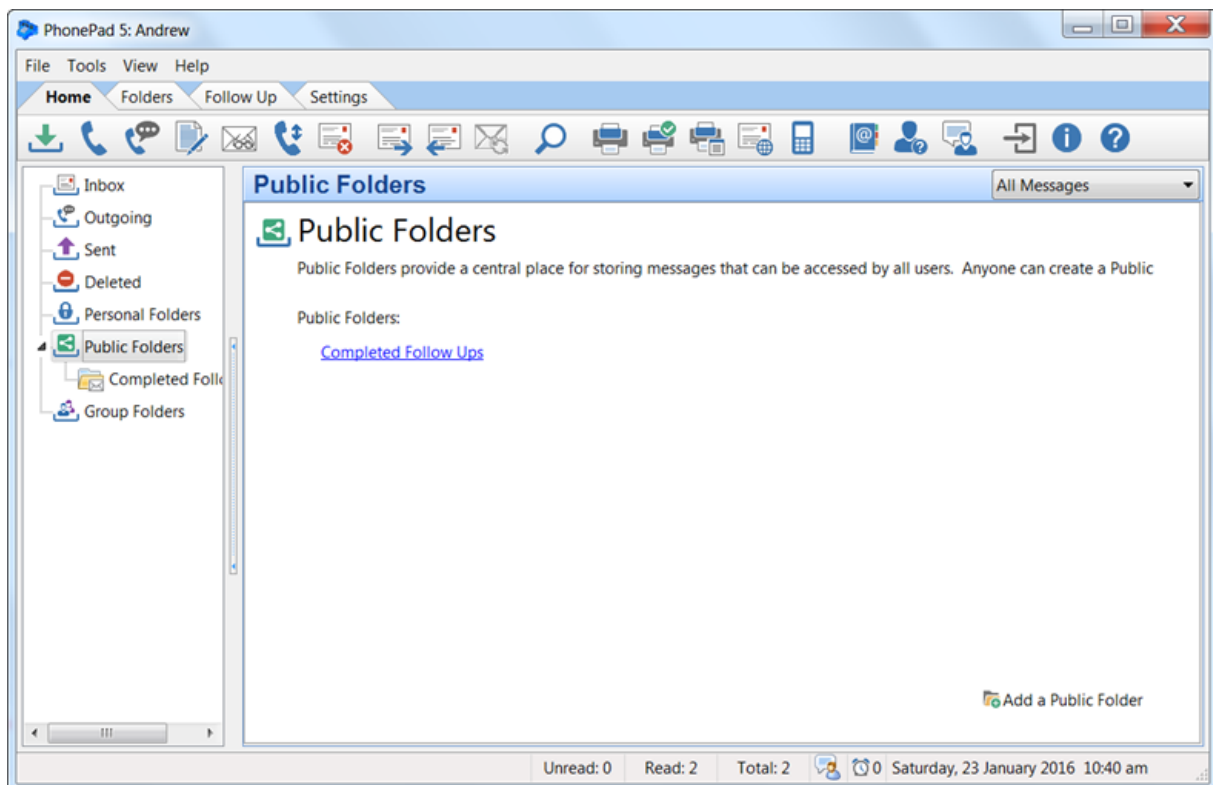
If you want to delete all messages in a Public folder, right-click on the folder in the folder tree, then select **Empty Folder** from the popup menu, or select the **Folders** tab on the toolbar and select **Empty Folder**.

You will be asked to confirm the deletion.



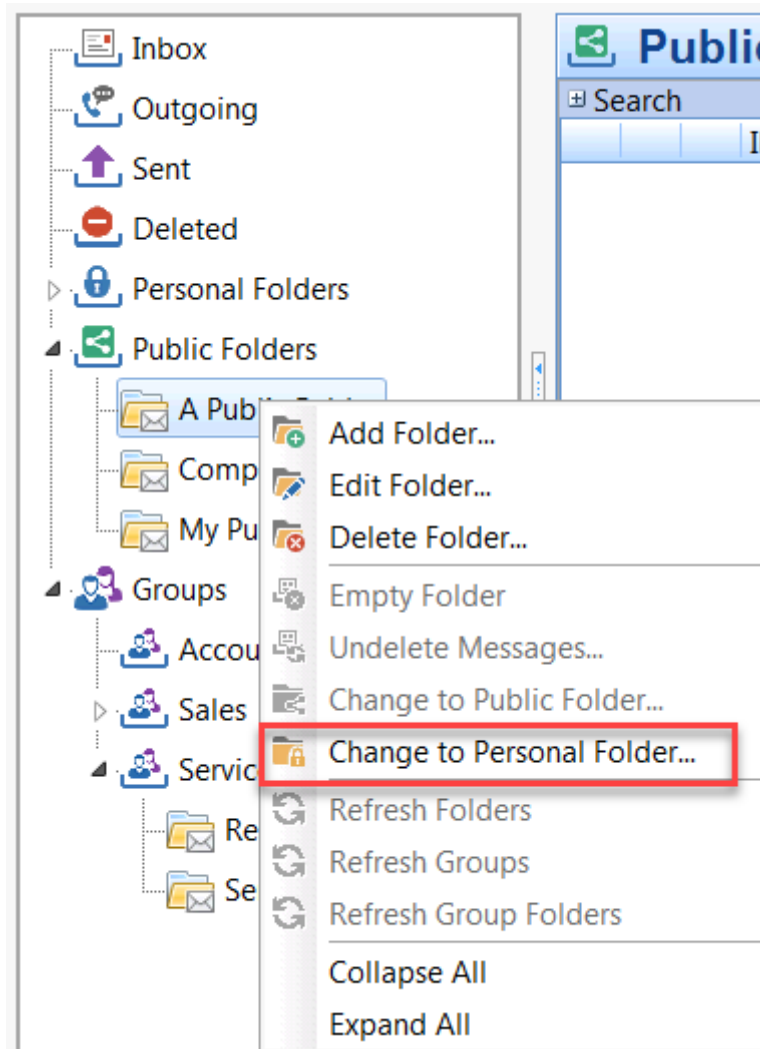
Accessing a Public Folder

You can access your Public folders by selecting the folder from the folder tree, or by clicking the link for the folder on the **Public Folders** home page.



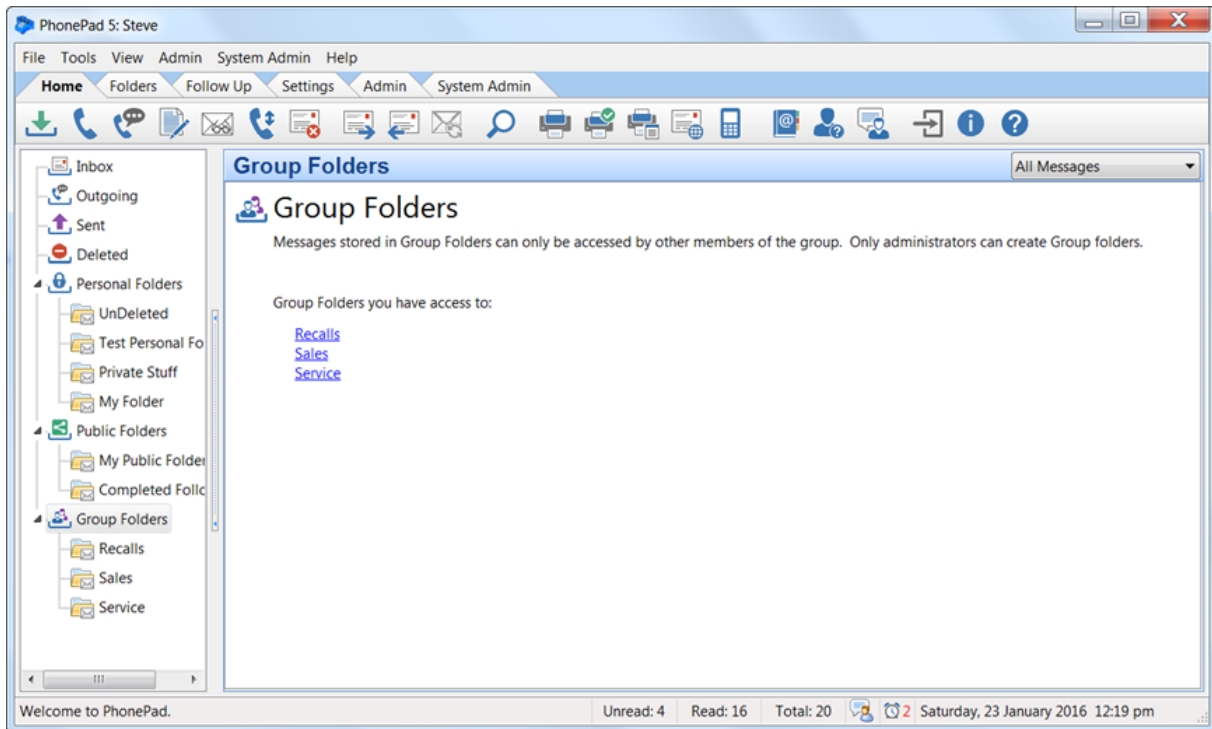
Changing a Public Folder to a Personal Folder

You can easily change a Public Folder to a Personal Folder by right-clicking on the Personal Folder and then selecting **Change to Personal Folder** from the popup menu.



Group Folders

Group folders are similar to Public folders in that they are shared folders, but they can only be accessed by members of the group the folders belong to. You have to be given access to a Group folder by an administrator.



Only administrators can add, edit and delete Group folders. Group folders can also be added, edited and deleted using the **Manage Groups** option on the **Admin** toolbar.

Adding a Group Folder

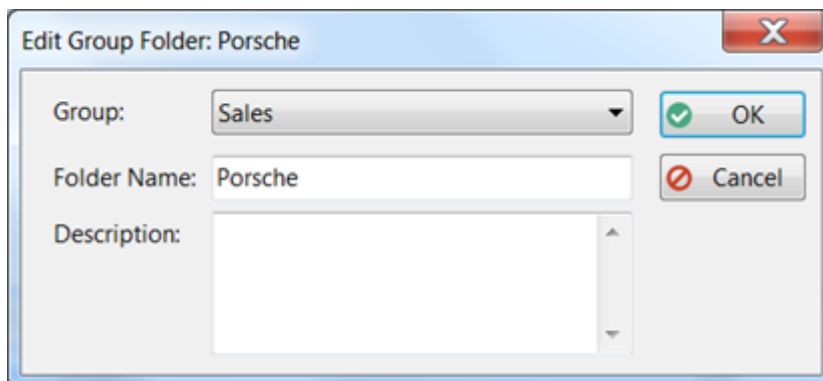
Select the **Folders** tab on the toolbar and select **Add New Folder**, or right-click on **Group Folders** in the folder tree and select **Add Folder** from the popup menu.

1. Select the **Group** the folder will belong to. Only members of that Group will be able to access this folder.
2. Enter a **Folder Name**.

3. Enter a **Description** if you wish.
4. Click **OK**.

Editing a Group Folder

Right-click on the folder in the folder tree, then select **Edit Folder** from the popup menu, or double-click on the folder in the folder tree, or or select the **Folders** tab on the toolbar and select **Edit Folder**.

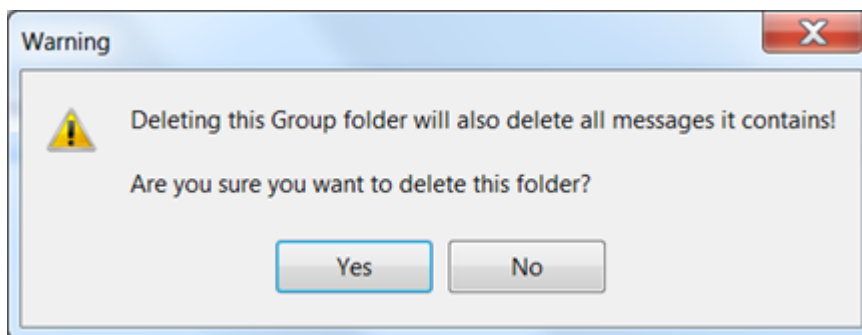


Make any required changes and then click **OK** to save them.

Deleting a Group Folder

Right-click on the folder in the folder tree, then select **Delete Folder** from the popup menu, or select the **Folders** tab on the toolbar and select **Delete Folder**.

You will be asked to confirm the deletion.



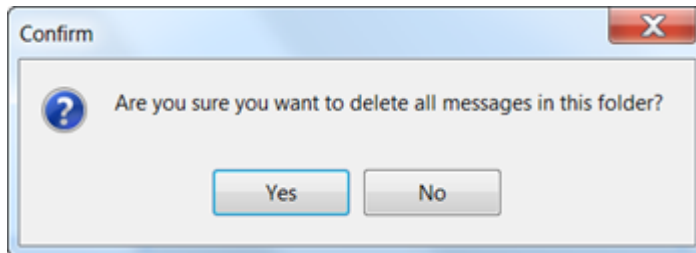
Any messages in the folder will also be deleted. The deleted messages will appear in the **Deleted** folder.

If you decide to undelete messages that were previously in a folder that has been deleted, the messages will be added to a Personal folder called **Undeleted**. If the folder doesn't exist then PhonePad will automatically create it.

Emptying a Group Folder

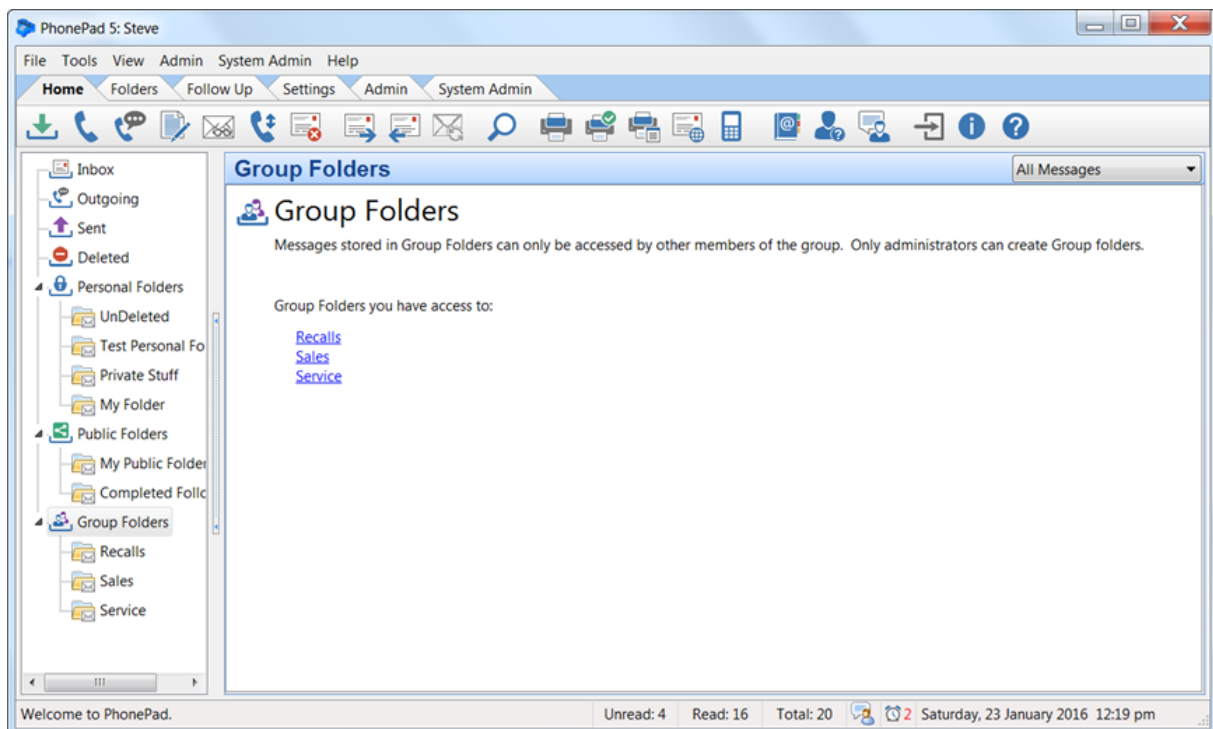
If you want to delete all messages in a Group folder, right-click on the folder in the folder tree, then select **Empty Folder** from the popup menu, or select the **Folders** tab on the toolbar and select **Empty Folder**.

You will be asked to confirm the deletion.



Accessing a Group Folder

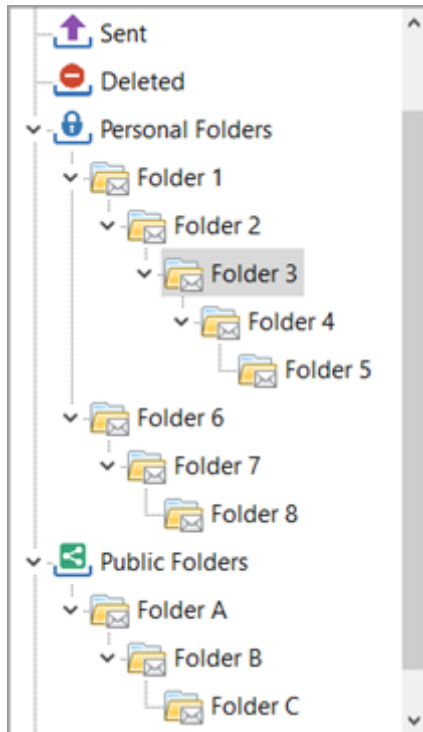
You can access your Group folders by selecting the folder from the folder tree, or by clicking the link for the folder on the **Group Folders** home page.



Sub-Folders

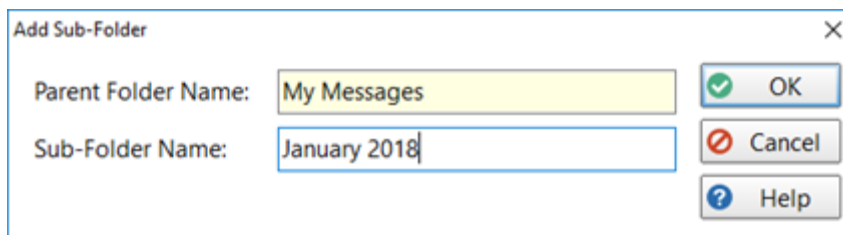
Personal and Public folders can have sub folders. You can go down as many levels as you want although it's recommended to not have more than 3 levels as it can be unwieldy to manage.

Sub-folders are added, edited and deleted in the same way as top-level folders.



Adding a Sub-Folder

Select **Personal Folders** in the folder tree and click the **Add a Personal Folder** link, or select the **Folders** tab on the toolbar and select **Add New Folder**, or right-click on **Personal Folders** in the folder tree and select **Add Folder** from the popup menu.

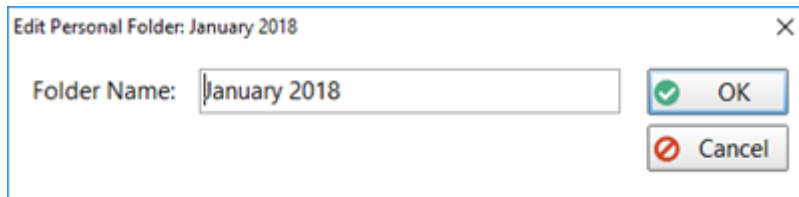


The Parent Folder Name will be shown but it cannot be edited in this window.

Enter a name for the new sub-folder and then click **OK**.

Editing a Sub-Folder

Right-click on the folder in the folder tree, then select **Edit Folder** from the popup menu, or double-click on the folder in the folder tree, or select the **Folders** tab on the toolbar and select **Edit Folder**.



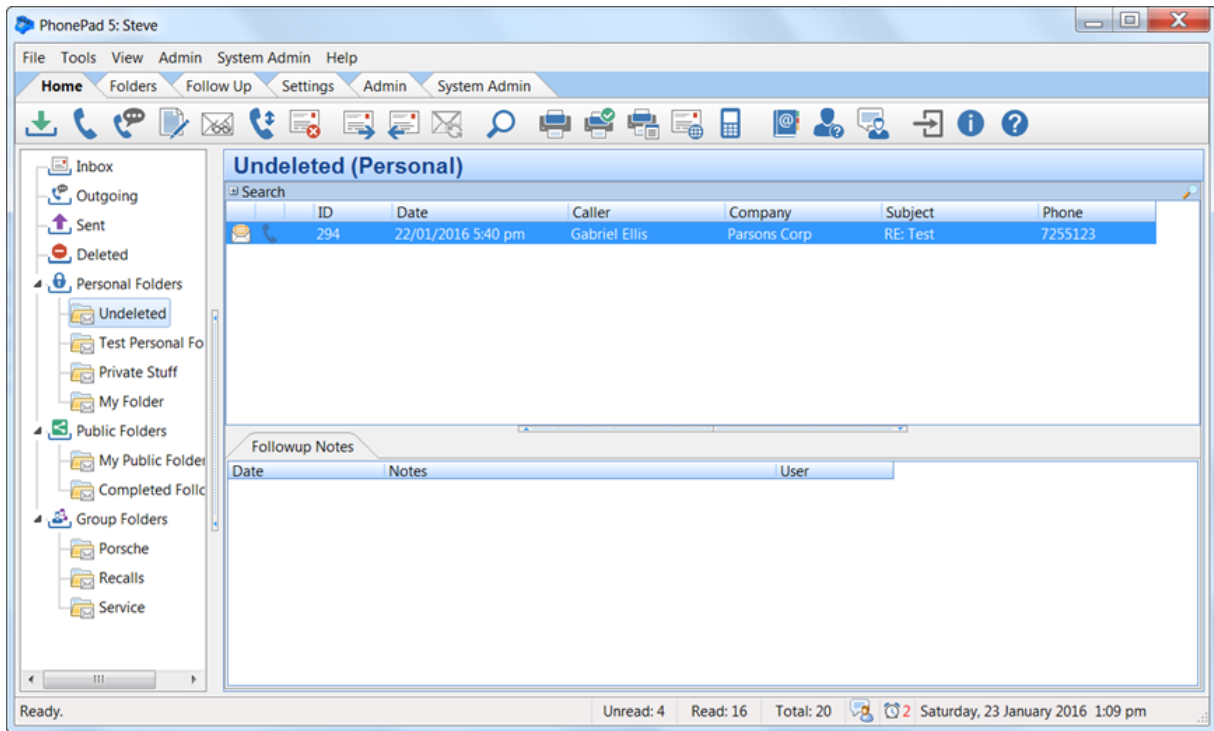
Click **OK** to save your changes.

Undeleted Folder

The **Undeleted** folder is a special Personal folder automatically created by PhonePad. The best way to explain how it works is to give an example:

You have a number of messages in a Personal or Public folder and decide to delete that folder. Any messages that are in that folder will be deleted as well. Deleted messages always end up in the **Deleted** folder of the user that deleted them.

If you decide to undelete any of these messages they have no place to be undeleted to as the folder no longer exists. PhonePad solves this by placing the messages in an **Undeleted** folder. If the folder doesn't exist PhonePad will create it. You can then move these messages to another folder.

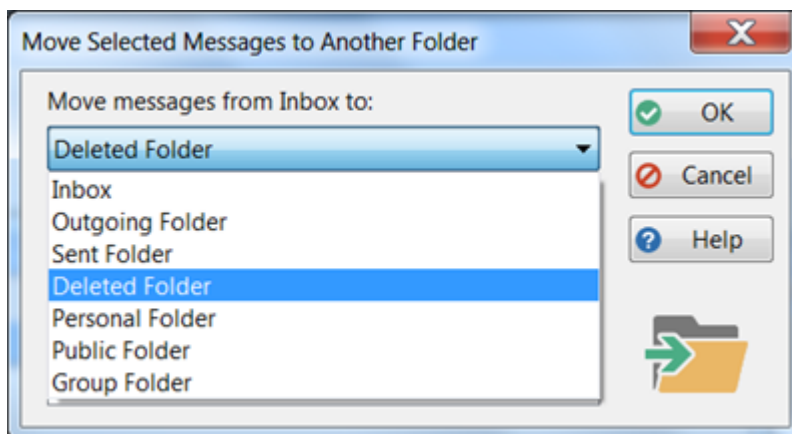


Moving Messages

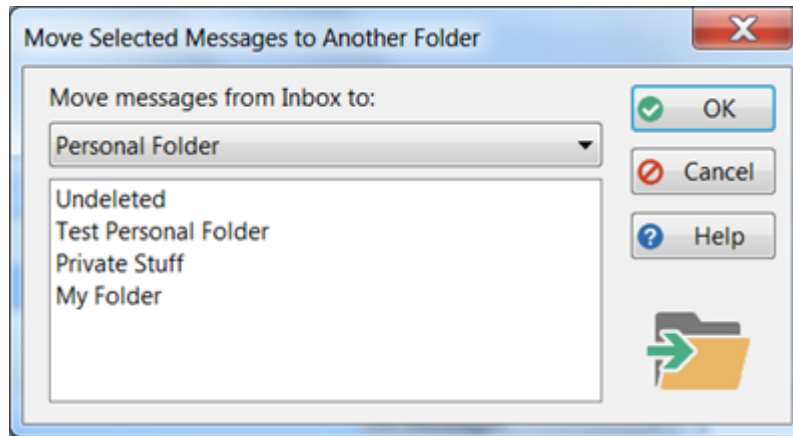
To move messages from one folder to another, select the message(s) and click the **Move Messages to Folder** button on the **Folders** tab of the toolbar, or right-click on the message and select **Move to Folder** from the popup menu.



The following window will be displayed:



If you select Personal Folder, Public Folder or Group Folder, you will also need to select the relevant folder:



Click **OK** to move the selected message(s).

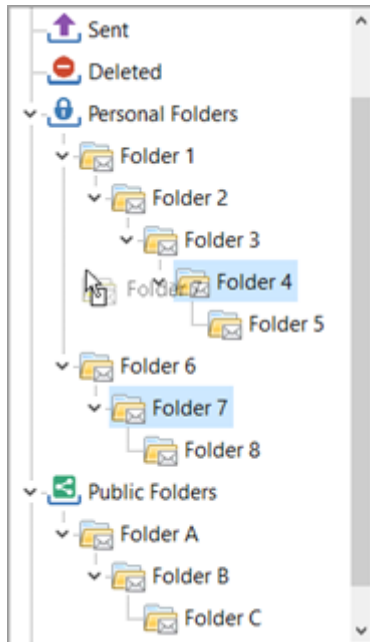
Drag and Drop Your Messages

A quicker and possibly better alternative is to use drag and drop to move messages between folders. Simply select the messages you want to move, then while holding the **<alt>** key and **left mouse button** down drag them to another folder, and then release the mouse button.

Moving Folders

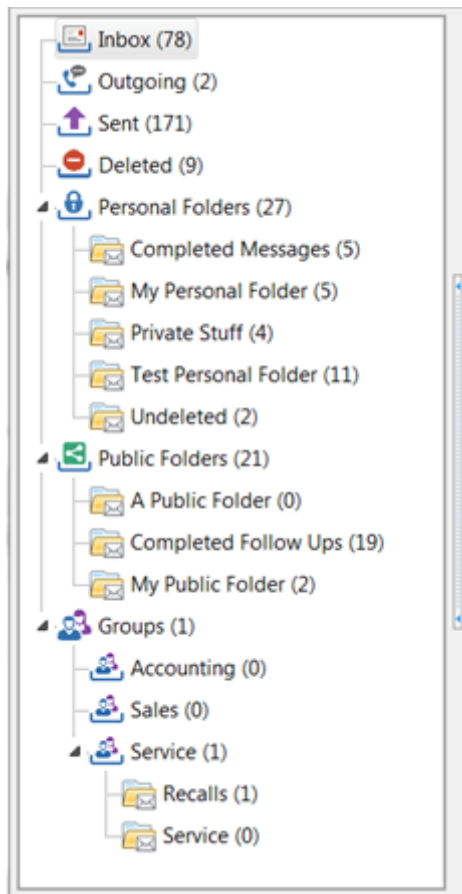
Folders can be moved by dragging and dropping them. Simply select the folder you want to move, then while holding the **<alt>** key and **left mouse button** down drag it to another folder, and then release the mouse button.

Folders can be dragged and dropped within Personal Folders and Public Folders. They can also be dragged from Personal Folders to Public Folders, and vice versa.



Folder Message Counts

The Folder Tree can optionally display the number of messages in each folder.



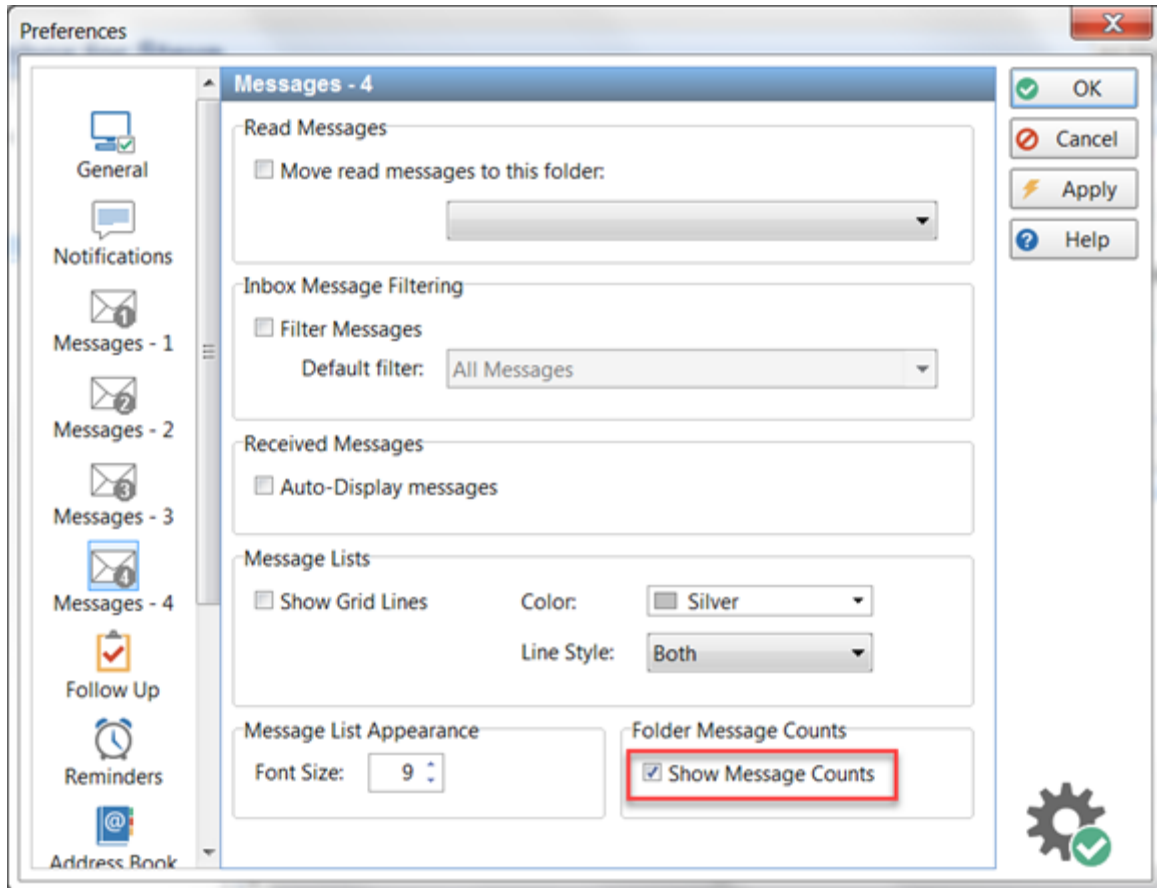
The **Inbox**, **Outgoing**, **Sent** and **Deleted** folders will display the total number of messages in each folder respectively.

Personal Folders will display the total number of messages in *all* personal folders you have, while each personal folder will show the total number of messages contained by that folder.

Public Folders will display the total number of messages in *all* public folders, while each public folder will show the total number of messages contained by that folder.

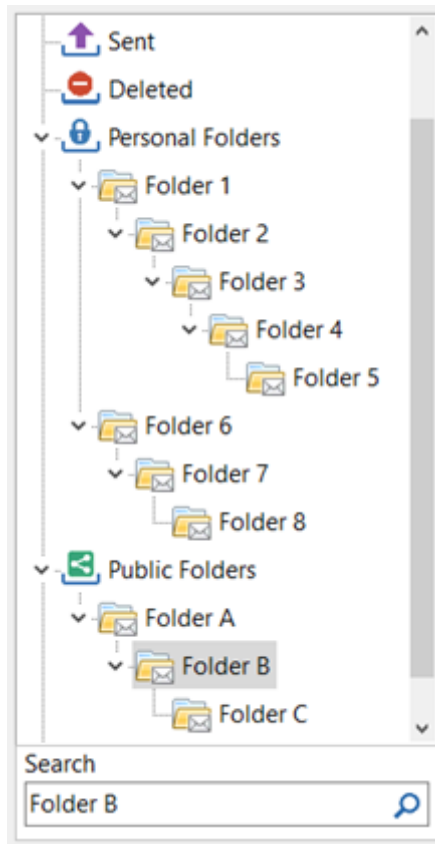
Groups will show the total number of messages across all groups that you are a member of. Each group will display the total number of messages for all group folders under it, and each group folder will show the total number of messages it contains.

To show or hide message counts, select **Preferences** from the **View** menu, then select **Messages-4**. Check or uncheck the **Show Message Counts** checkbox.



Searching Folders

If you end up with a lot of folders and sub-folders it may be difficult to find the folder you're after. Fortunately the Folder Tree has a search option located at the bottom of the tree.

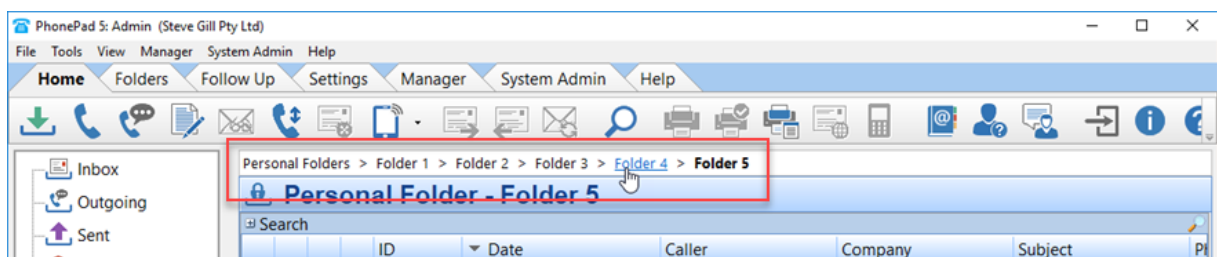


Enter search text and click the search button.

If more than one occurrence of the text is found you can click the search button to navigate to the next folder. Once you reach the last occurrence found the search will wrap around to the first one again.

Navigation Bar

If you have a lot of sub-folders it can be easy to forget where you are hierarchy and also to navigate to a folder further up the line. That's where the Folder Navigation Bar comes in handy.



The Navigation Bar shows which folder you current have selected in bold. You can easily navigate up the tree by selecting a folder above the selected folder. For example, in the screenshot above we have Folder 5 selected. If we hover the mouse button over Folder 4 it becomes highlighted. Clicking on the folder name will take you to that folder.

The Navigation Bar is only visible when you have either Personal or Public folders selected.

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Chapter

6

Following Up

Following Up

PhonePad's Follow Up features provide a way of tracking and managing your calls more effectively. They ensure that calls are returned when they should be and that none fall between the cracks.

The Follow Up features include the ability to:

- Mark messages to be followed up.
- Mark messages when follow up has been completed.
- Keep extensive Follow Up notes.
- Set reminders to follow up calls and to alert you when they are overdue.
- Automatically set follow ups

Mark Messages for Follow Up

You can mark messages to be followed up so that you can easily identify them in your message lists.

To mark a message for follow up, select the message and then click the **Mark for Follow Up** button on the **Follow Up** tab on the toolbar, or select **Follow Up/Mark for Follow Up** from the **File** menu.



When you mark a message for follow up, an icon will be displayed next to the message. The message will also be highlighted in a different color. All users who received the message will also have their message marked for follow up.

Inbox							All Messages
Search							
	ID	Date	Caller	Company	Subject	Phone	
	284	21/01/2016 8:11 am	Abby Brock	Mathews Limited	Please send conferenc...	81716...	
	271	12/01/2016 6:09 pm	Selena Knapp	Terrell LLC	Friday.	80204...	

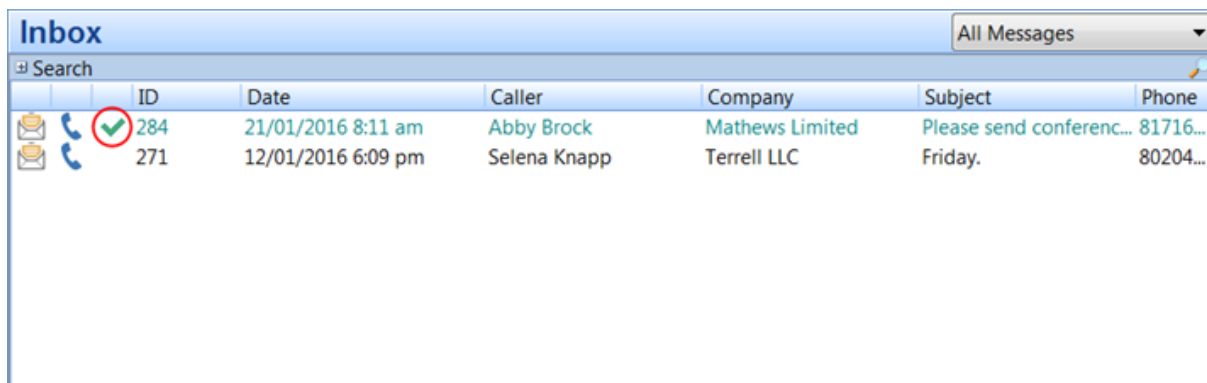
Mark Follow Ups as Completed


Once you have completed a follow up, you can mark the message as completed.

To mark a message for follow up, select the message and then click the **Mark for Follow Up** button on the **Follow Up** tab on the toolbar, or select **Follow Up/Mark for Follow Up** from the **File** menu.



An icon will be displayed next to the message indicating that follow up has been completed.



Inbox		All Messages					
Search							
	ID	Date	Caller	Company	Subject	Phone	
	284	21/01/2016 8:11 am	Abby Brock	Mathews Limited	Please send conferenc...	81716...	
	271	12/01/2016 6:09 pm	Selena Knapp	Terrell LLC	Friday.	80204...	

All other users who received the same message will also have theirs marked as completed. This lets other users know that no further follow up action is required.

Unmarking a Message for Follow Up

A message that has been marked for Follow Up can be unmarked by selecting the message and then clicking the **Mark for Follow Up** button on the **Follow Up** tab on the toolbar, or by selecting **Follow Up/Mark for Follow Up** from the **File** menu.



When you unmark a message for follow up, any other user who received the same message will also have their message unmarked.

Automatically Marking Messages for Follow Up

Using **System Rules**, administrators can configure PhonePad to automatically mark all new messages for Follow Up.

Follow Up Notes

Follow Up Notes provide a way to keep comprehensive notes on all interaction with a caller. You can add notes on conversations you've had with callers, any follow up action such as call backs, messages left, etc.

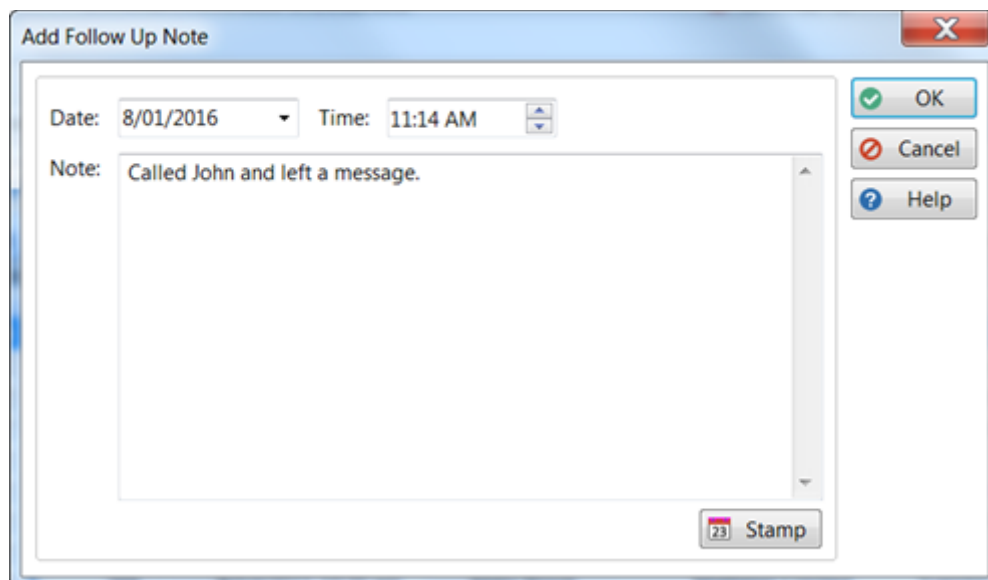
Follow Up Notes are accessible by all users who have received the same message so it provides a great way to coordinate any follow up action between a group of users.

Add a Follow Up Note

To add a Follow Up Note, select a message and then click the **Add a Follow Up Note** button on the **Follow Up** tab on the toolbar, or select **Follow Up/Add Follow Up Note** from the **File** menu, or right-click on the Follow Up Notes area and select **Add Follow Up Note** from the popup menu.

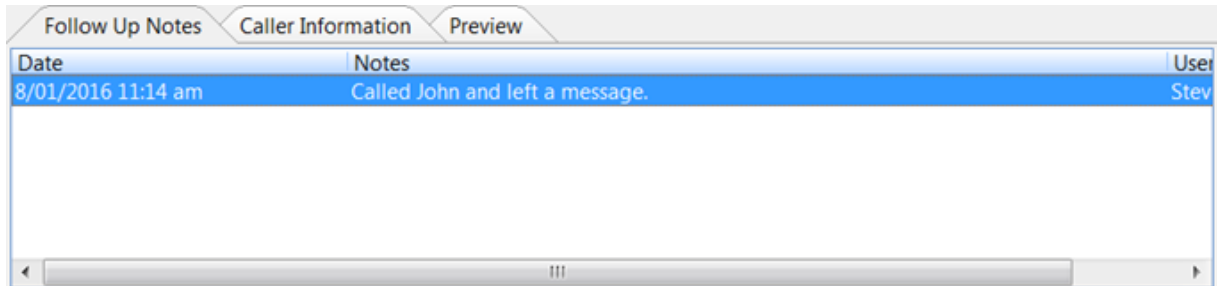


The Add Follow Up Note window will be displayed.



The date and time are automatically filled in for you, but they can be changed if required. Enter your comments in the Note area and then click **OK**.

The note will then appear under the Follow Up Notes tab.



Date	Notes	User
8/01/2016 11:14 am	Called John and left a message.	Stev

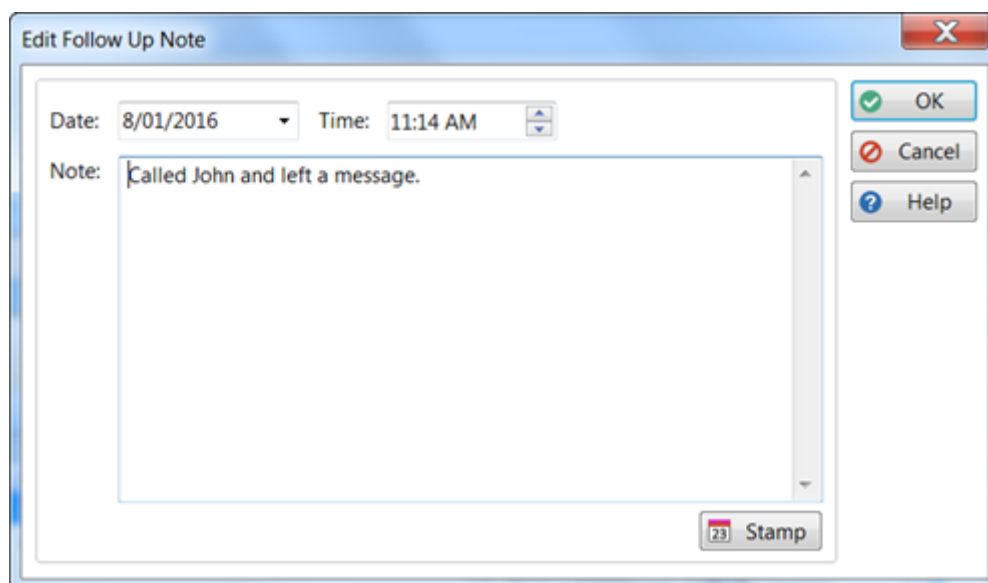
You can potentially add as many follow up notes as you like.

Edit a Follow Up Note

To edit a Follow Up Note, select a message and then click the **Edit a Follow Up Note** button on the **Follow Up** tab on the toolbar, or select **Follow Up/Edit Follow Up Note** from the **File** menu, or right-click on the Follow Up Notes area and select **Edit Follow Up Note** from the popup menu, or simply double-click on the follow up note.



If you create the follow up note you will be able to edit it. If you didn't create the follow up note then you will only be able to view it.



Edit Follow Up Note

Date: 8/01/2016 Time: 11:14 AM

Note: Called John and left a message.

OK Cancel Help

Stamp

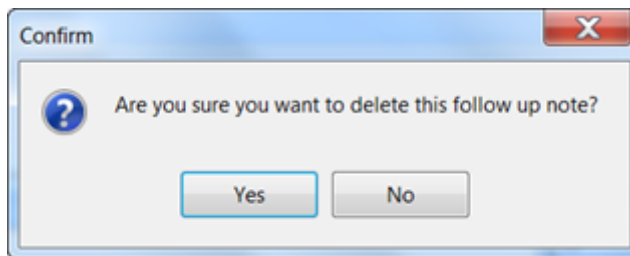
Make the required changes and then click **OK**.

Delete a Follow Up Note

To delete a Follow Up Note, select a message and then click the **Delete a Follow Up Note** button on the **Follow Up** tab on the toolbar, or select **Follow Up/Delete Follow Up Note** from the **File** menu, or right-click on the Follow Up Notes area and select **Delete Follow Up Note** from the popup menu.



You will be asked to confirm the deletion.



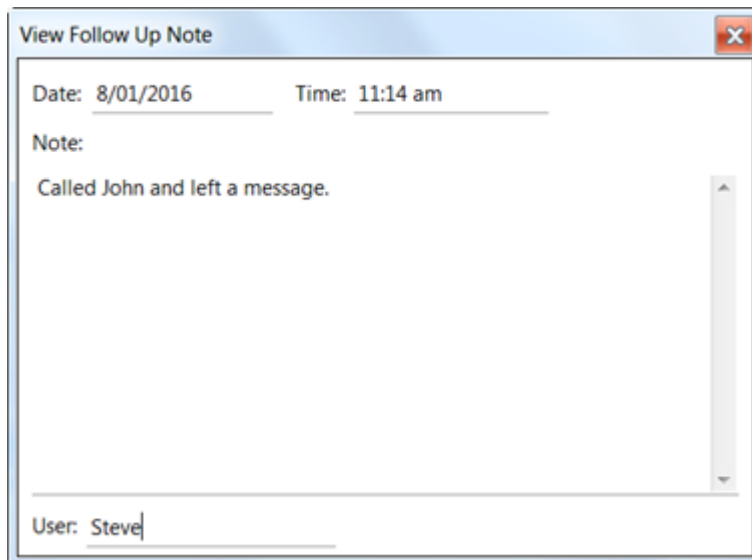
You can only delete follow up notes that you have created.

View a Follow Up Note

To view a Follow Up Note, select a message and then click the **View a Follow Up Note** button on the **Follow Up** tab on the toolbar, or select **Follow Up/View Follow Up Note** from the **File** menu, or right-click on the Follow Up Notes area and select **View Follow Up Note** from the popup menu.



The Follow Up Note will open.



Printing Follow Up Notes

You can print all of the Follow Up Notes for a message. Right-click in the Follow Up Notes area and select **Print Follow Up Notes** from the popup menu.

Reminders

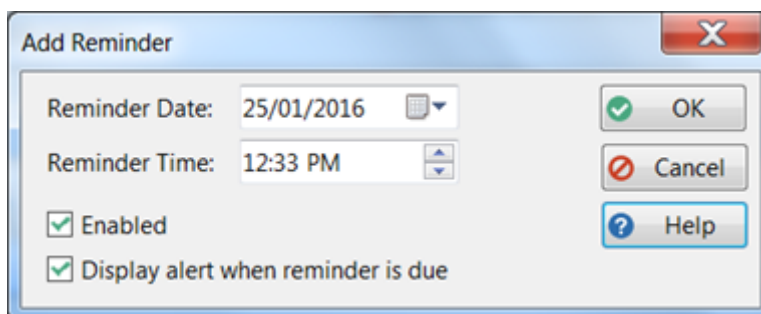
To ensure that follow ups are done in a timely manner you can set up reminders.

Adding a Reminder

To add a reminder, select a message and then click **Add Reminder** on the **Follow Up** tab on the toolbar, or right-click on the message and select **Add Reminder** from the popup menu.



The **Add Reminder** window will be displayed.



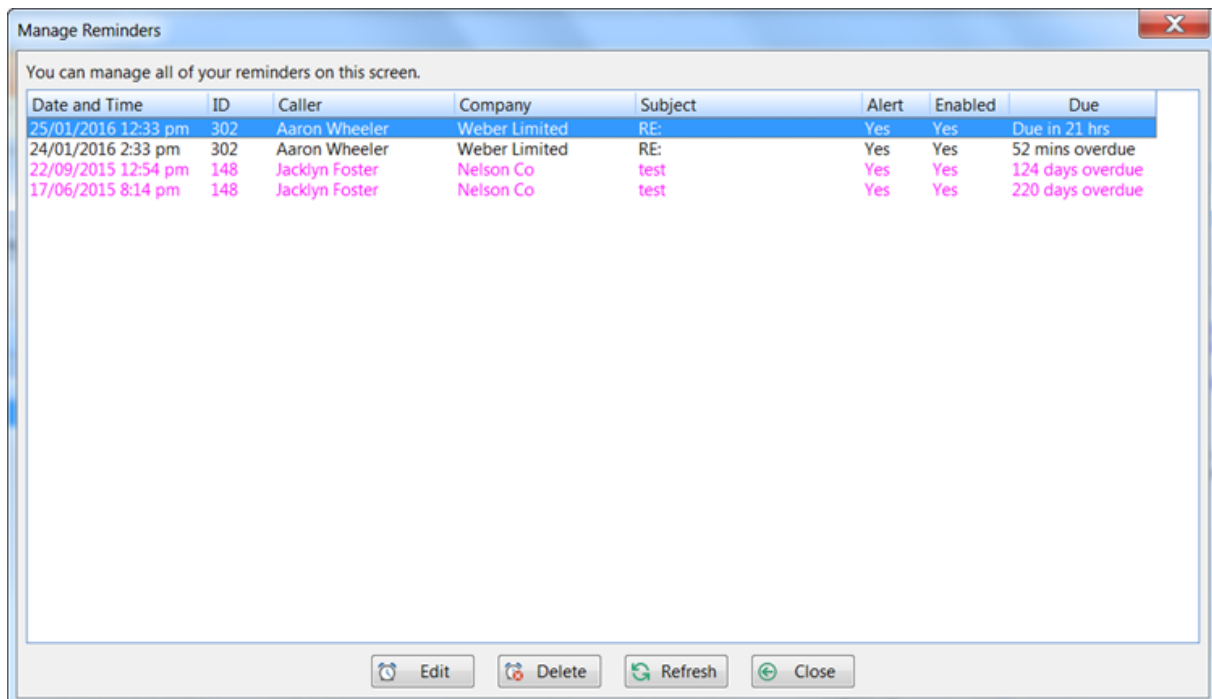
Reminder Date	This is preset to the next day. You can change the date to whatever you want.
Reminder Timer	This is preset to the current time but you can also change this.
Enabled	When checked, the reminder is enabled.
Display alert when reminder is due	When checked, a reminder will be displayed when a reminder is due.

Editing a Reminder

To edit a reminder, select a message and then click **Manage Reminders** on the **Follow Up** tab on the toolbar.



The **Manage Reminders** window will be displayed.



Click the **Edit** button.

Edit Reminder
✕

Reminder Date:

Reminder Time:

Enabled

Display alert when reminder is due

OK

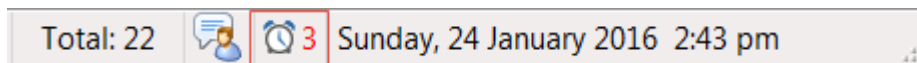
Cancel

Help

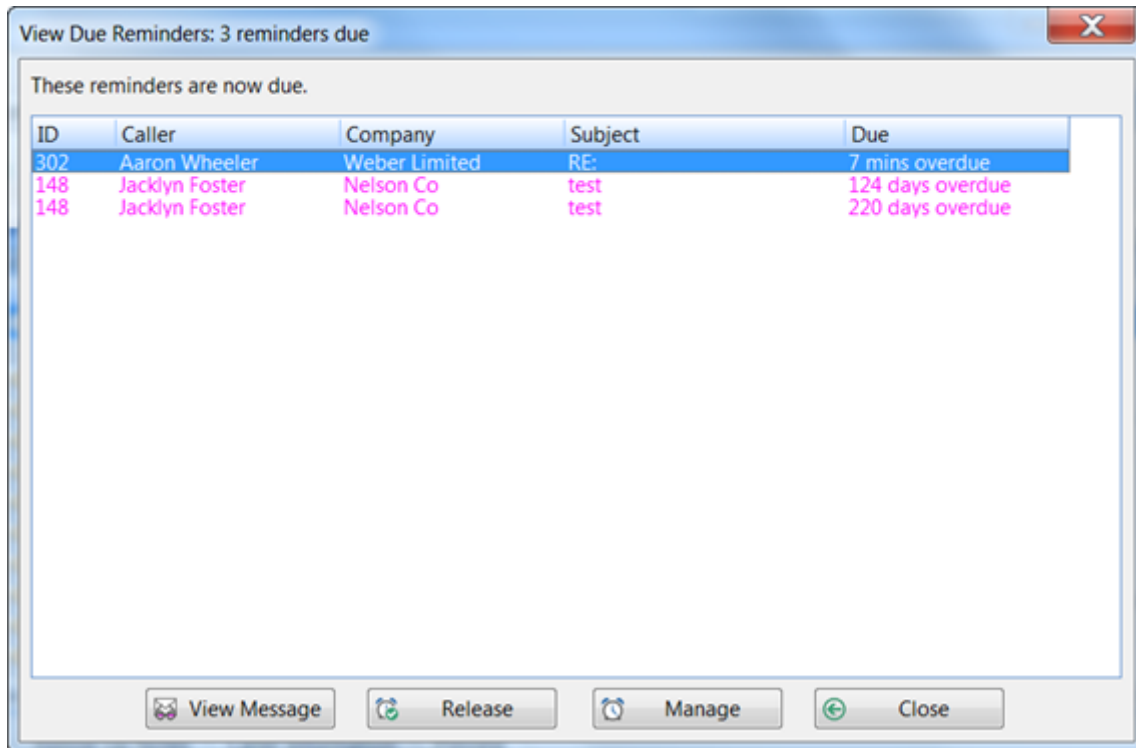
Reminder Date	This is preset to the next day. You can change the date to whatever you want.
Reminder Timer	This is preset to the current time but you can also change this.
Enabled	When checked, the reminder is enabled.
Display alert when reminder is due	When checked, a reminder will be displayed when a reminder is due.

Viewing Due Reminders

The **Reminders** icon on the status bar shows how many due reminders you have. In the example below there are 3 reminders that are due or overdue.



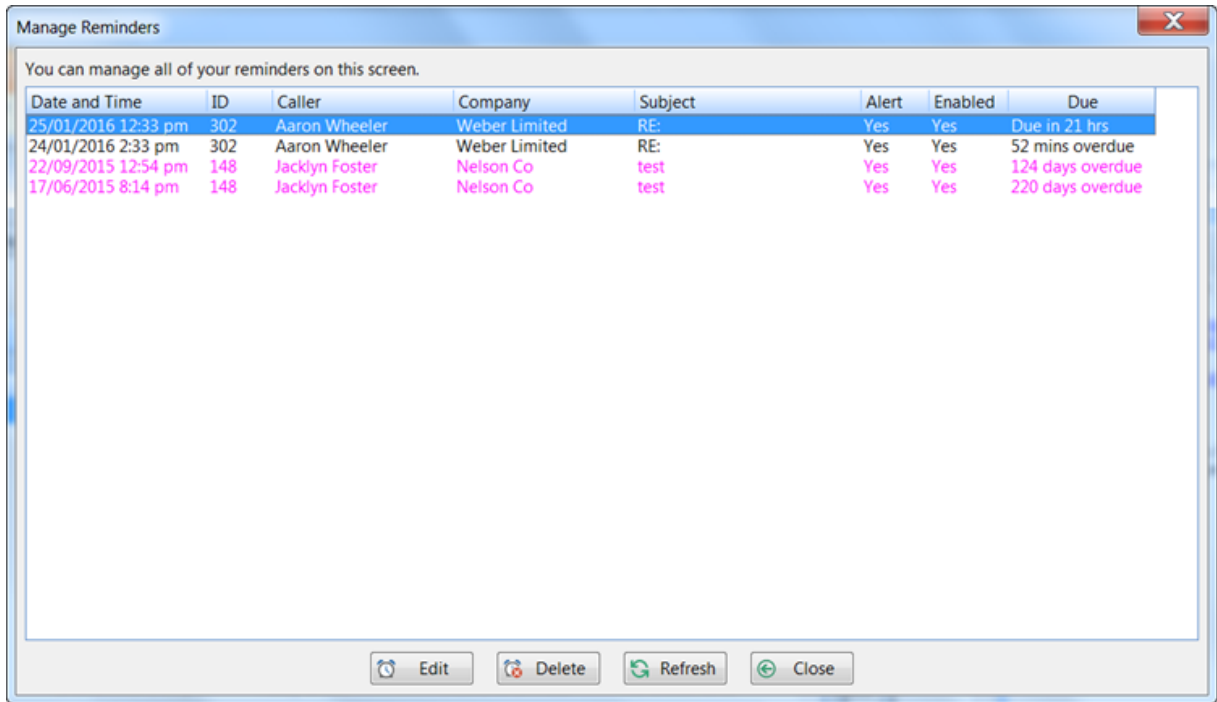
You can view all of your due reminders by clicking on the icon, or by selecting **View Reminders** from the **Follow Up** tab on the toolbar.



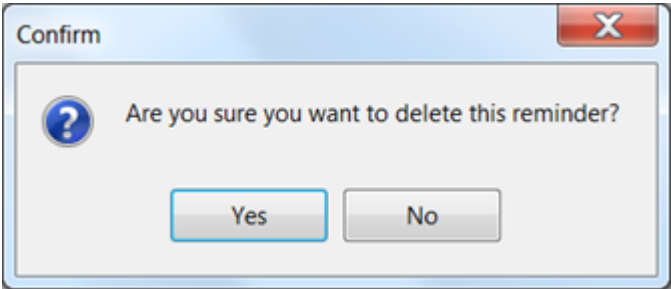
View Message	Click to view the message the reminder is linked to.
Release	Click to dismiss the reminder. Do this when you no longer require the reminder.
Manage	Click to manage all of your reminders.
Close	Click to close this window.

Managing Reminders

If you want to manage your reminders, click the **Manage Reminders** button on the **Follow Ups** tab on the toolbar.



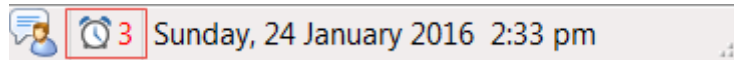
All reminders will be shown: due, overdue and not yet due.

Edit	Click this button so that you can change details of the reminder.
Delete	Click this button to delete the reminder. You will be asked to confirm the deletion. 
Refresh	Click to update the reminder list.
Close	Click to close the window.

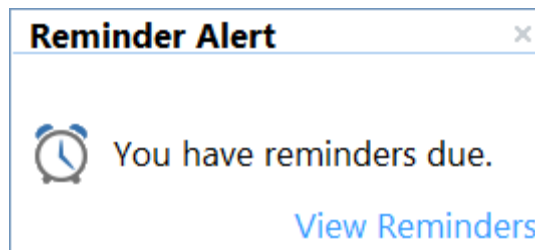
Reminder Alerts

You can configure PhonePad to display alerts when reminders are due.

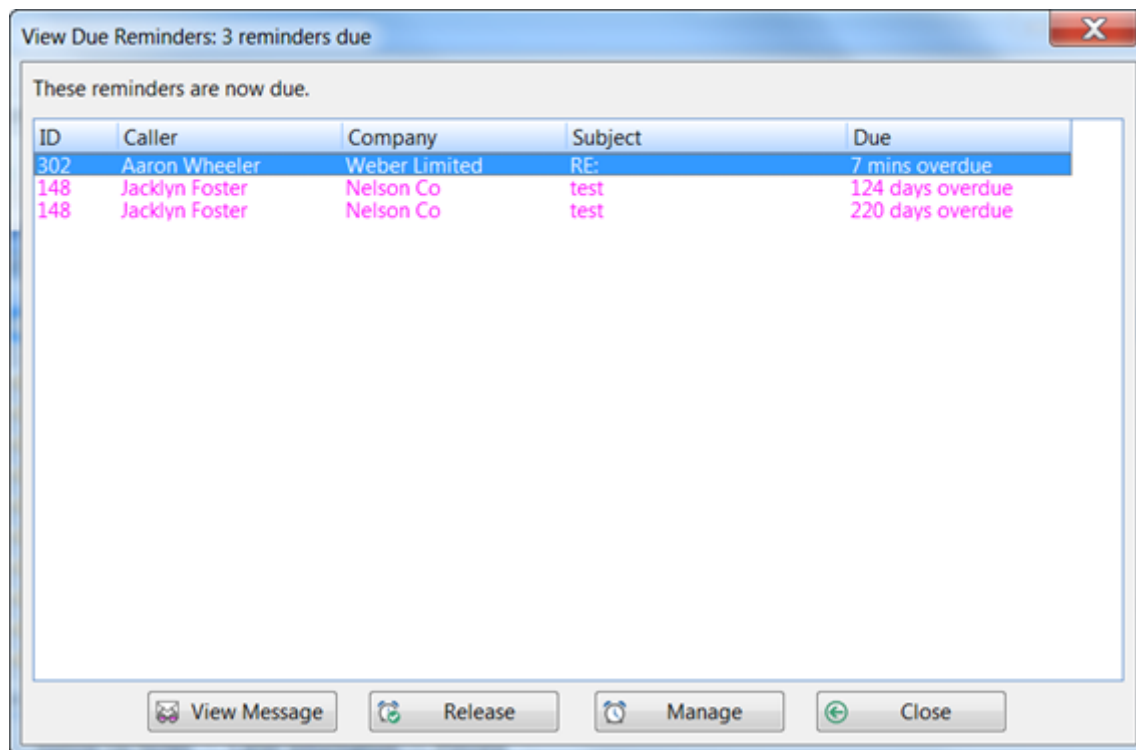
The Reminder icon will flash on the status bar. You can click the icon to view all of your reminders.



A reminder alert will appear just above the right-side of the Windows taskbar. You can click **View Reminders** to display all of your due and overdue reminders



The **View Due Reminders** window will be automatically displayed.



You can configure the reminder alert settings by selecting **Preferences** from the **View** menu and then selecting **Reminders**.

Chapter

7

Caller ID

Caller ID

Caller ID is a handy feature that enables you to see who's calling whenever the phone rings.

PhonePad's Caller ID feature will display a popup window that shows details of the call. Standard Caller ID information shows the phone number and sometimes the caller's name. With PhonePad, if the caller's details are in the Address Book this extra information will also be shown.



CallerID.com

PhonePad incorporates support for Caller ID devices from CallerID.com.

They sell a number of devices which support multiple phone lines. PhonePad is compatible with any of the Ethernet devices (**not** the Serial Port versions).

The bare minimum device is the Basic model with Ethernet connectivity. These are available in 2, 4 and 8 line configurations.



Images are copyright CallerID.com.

How It Works

The CallerID.com devices connect to your phone system and network. The Caller ID data is transmitted over your network to all computers where it is received by PhonePad.

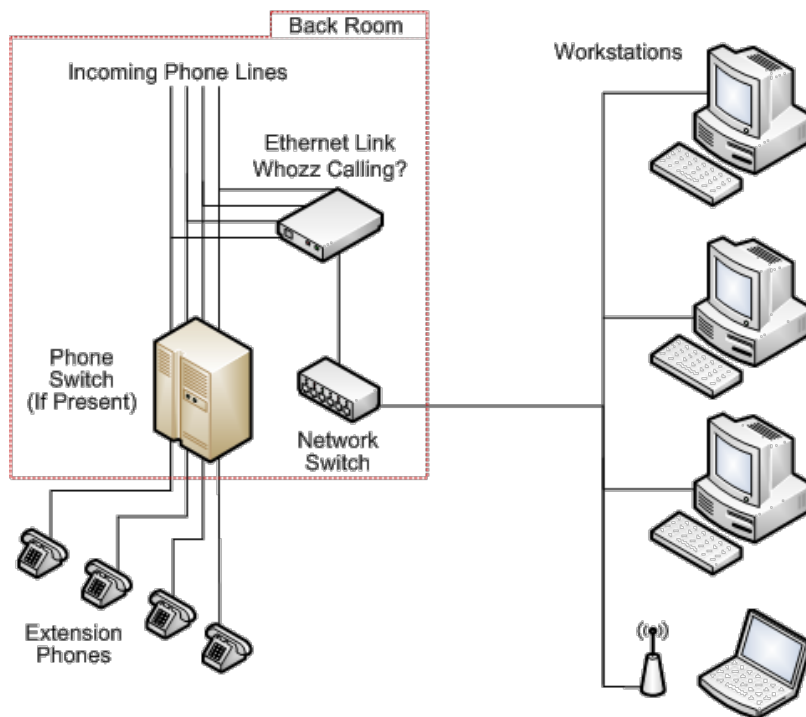
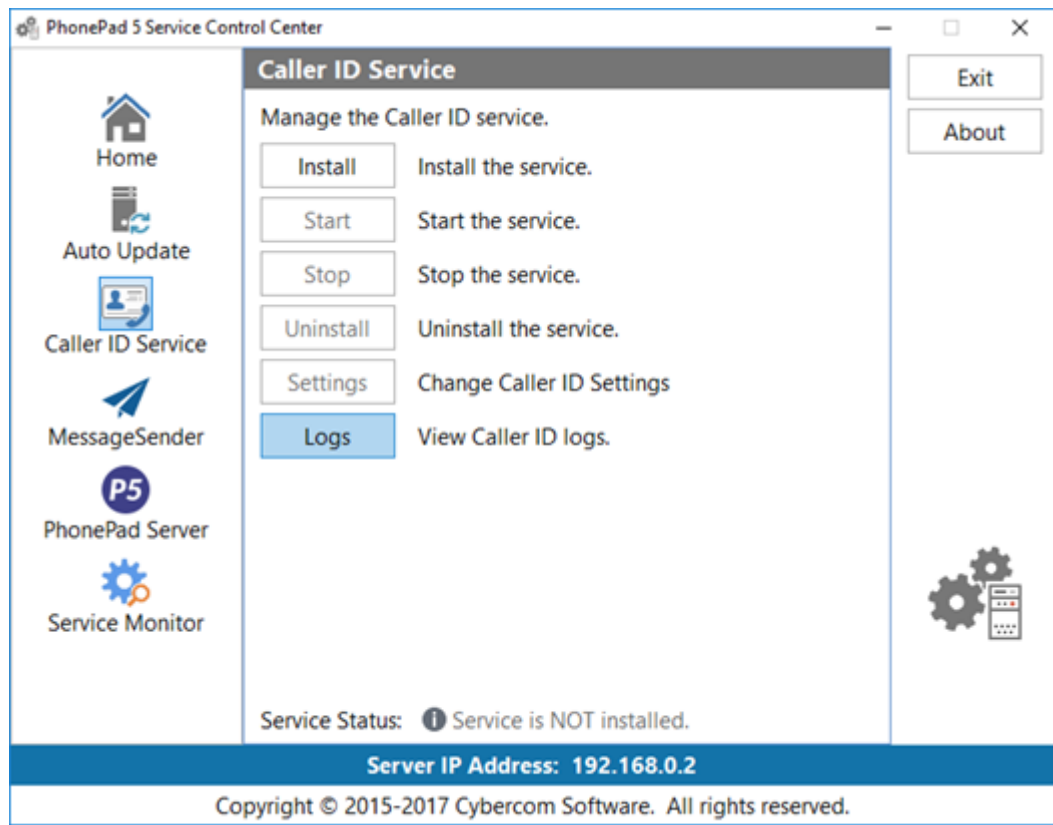


Image: Copyright © callerid.com

The CallerID.com devices work with virtually any phone system.

Installing the Caller ID Service

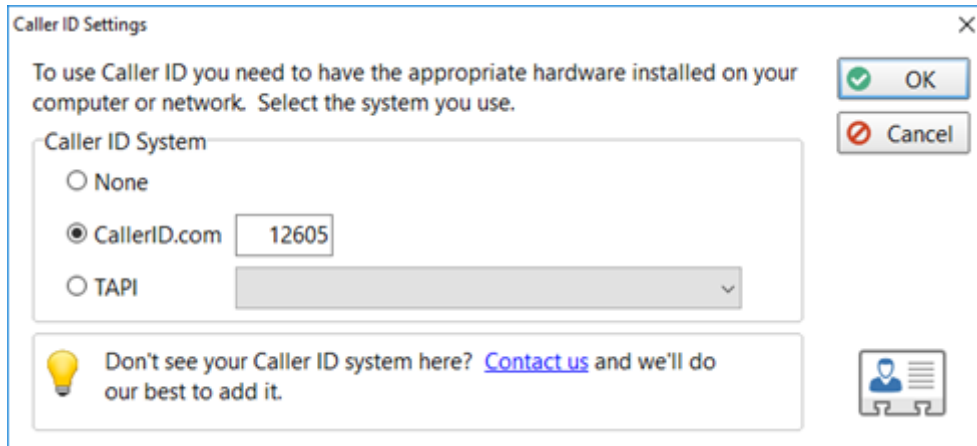
Before you can use Caller ID you will need to install and start the Caller ID Service using **Control Center** on your Server or Host PC.




1. Run **Control Center**.
2. Select **Caller ID Service**.
3. Click **Install**.
4. Click **Start**.

Configuring CallerID.com

If you have a CallerID.com device on your network you can configure PhonePad to receive the Caller ID data from it by selecting **Caller ID Settings** from the **View** menu, or by clicking the Caller ID Settings button on the **Settings** toolbar. Select **CallerID.com** from the 3 options, then click **OK**.



Warning: You can also set the port number but do not change it from the default unless you know for sure that it is different from port **12605**.

 The CallerID.com devices broadcast the Caller ID data on a different port. This data is received by the PhonePad 5 Caller ID Service running on your Server or Host PC. It broadcasts this data to PhonePad 5 on all workstations and logs the data in the PhonePad 5 database. This is how it maintains a history of all calls.

Caller Information

When you receive an incoming call this window will be displayed.



It shows the caller's phone number. PhonePad will also check the Address Book to see if the caller has called before. If they have, their information will be displayed.

If you click the **Take a Message** button PhonePad will open a new message and prefill the caller's details.

Call History

This screen is only available if you have a CallerID.com device installed on your network.

Depending on the version of **CallerID.com** hardware you have connected to your network, PhonePad will maintain a complete history of all incoming calls, or both incoming and outgoing calls for all of your phone lines. This includes answered and unanswered calls.

To access this screen, click on the **Call History** button on the **Follow Up** toolbar, or select **Call History** from the **View** menu.

The screenshot shows a 'Call History' window with two sections: 'Incoming Calls' and 'Outgoing Calls'. Each section contains a table with columns for Line, Date, Duration, Caller, Company, and Phone Number. The 'Incoming Calls' section lists 13 calls, and the 'Outgoing Calls' section lists 3 calls. The window also features 'Print' and 'Close' buttons on the right and 'History List' and 'History Graph' tabs at the bottom.

Incoming Calls					
Line	Date	Duration	Caller	Company	Phone Number
1	29/09/2017 11:57:00 ...	2 mins 3 secs	Smith, John		800-240-4637
1	29/09/2017 11:28:00 ...	2 mins 3 secs	Smith, John		800-240-4637
1	28/09/2017 4:11:00 PM	2 mins 3 secs	Smith, John		800-240-4637
2	28/09/2017 4:04:00 PM	2 mins 3 secs	Aaron Fisher	Fisher Enterprises	770-263-7111
2	28/09/2017 3:54:00 PM	2 mins 3 secs	Aaron Fisher	Fisher Enterprises	770-263-7111
1	28/09/2017 3:54:00 PM	2 mins 3 secs	Smith, John		800-240-4637
1	28/09/2017 3:53:00 PM	2 mins 3 secs	Smith, John		800-240-4637
1	28/09/2017 3:52:00 PM	2 mins 3 secs	Smith, John		800-240-4637
2	28/09/2017 3:49:00 PM	2 mins 3 secs	Aaron Fisher	Fisher Enterprises	770-263-7111
4	28/09/2017 3:49:00 PM	2 mins 3 secs			No-CallerID
1	28/09/2017 3:48:00 PM	2 mins 3 secs	Smith, John		800-240-4637

Outgoing Calls					
Line	Date	Duration	Caller	Company	Phone Number
4	28/09/2017 4:06:00 PM	2 mins 3 secs			No-CallerID
4	21/09/2017 5:42:00 AM	2 mins 3 secs	Smith, John	Fisher Enterprises	770-263-7111
4	21/09/2017 5:41:00 AM	2 secs	Smith, John	Fisher Enterprises	770-263-7111

Print	Displays the Call History, enabling you to print the list or export it to PDF.
Close	Closes the Call History window.

History List

The **History List** displays a history of all **Incoming Calls**. Depending on the Caller ID hardware you have it may also display all **Outgoing Calls** as well.

Call History
✕

Incoming Calls					
Line	Date	Duration	Caller	Company	Phone Number
1	29/09/2017 11:57:00 ...	2 mins 3 secs	Smith, John		800-240-4637
1	29/09/2017 11:28:00 ...	2 mins 3 secs	Smith, John		800-240-4637
1	28/09/2017 4:11:00 PM	2 mins 3 secs	Smith, John		800-240-4637
2	28/09/2017 4:04:00 PM	2 mins 3 secs	Aaron Fisher	Fisher Enterprises	770-263-7111
2	28/09/2017 3:54:00 PM	2 mins 3 secs	Aaron Fisher	Fisher Enterprises	770-263-7111
1	28/09/2017 3:54:00 PM	2 mins 3 secs	Smith, John		800-240-4637
1	28/09/2017 3:53:00 PM	2 mins 3 secs	Smith, John		800-240-4637
1	28/09/2017 3:52:00 PM	2 mins 3 secs	Smith, John		800-240-4637
2	28/09/2017 3:49:00 PM	2 mins 3 secs	Aaron Fisher	Fisher Enterprises	770-263-7111
4	28/09/2017 3:49:00 PM	2 mins 3 secs			No-CallerID
1	28/09/2017 3:48:00 PM	2 mins 3 secs	Smith, John		800-240-4637

Outgoing Calls					
Line	Date	Duration	Caller	Company	Phone Number
4	28/09/2017 4:06:00 PM	2 mins 3 secs			No-CallerID
4	21/09/2017 5:42:00 AM	2 mins 3 secs	Smith, John	Fisher Enterprises	770-263-7111
4	21/09/2017 5:41:00 AM	2 secs	Smith, John	Fisher Enterprises	770-263-7111

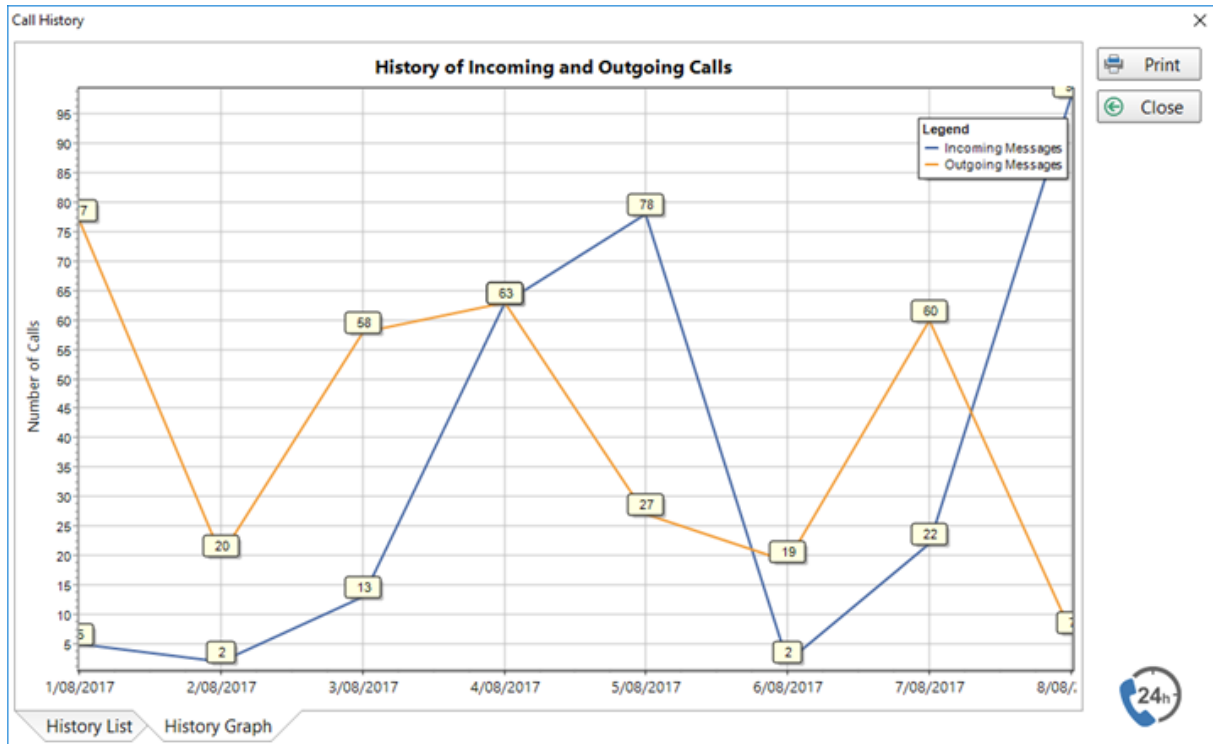
History List
History Graph

Print
Close

Double-clicking on a call in the Incoming Calls list will open a new incoming phone message with the caller's details prefilled. You can also double-click on a call in the Outgoing Calls list to create a new outgoing message with the caller's details prefilled.

History Graph

The **History Graph** shows a visual representation of all **Incoming Calls** (shown in blue) and **Outgoing Calls** (shown in orange).



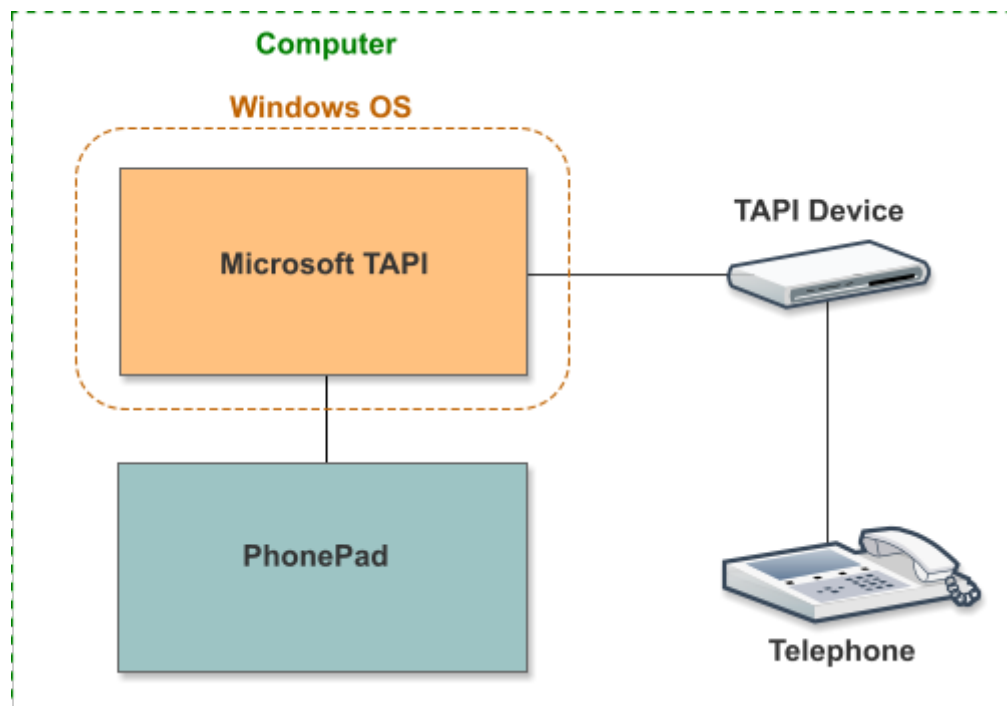
You can scroll through the dates by holding your left mouse button down on the chart and dragging it left or right.

TAPI

PhonePad supports the Microsoft Windows Telephony Application Programming Interface (TAPI). You will require a TAPI-compliant device (eg. a modem) to use this feature.

How It Works

PhonePad doesn't communicate directly with your TAPI devices. Instead it connects through the Microsoft Windows Telephony Application Programming Interface (TAPI) to communicate with any TAPI devices on your workstation or network.

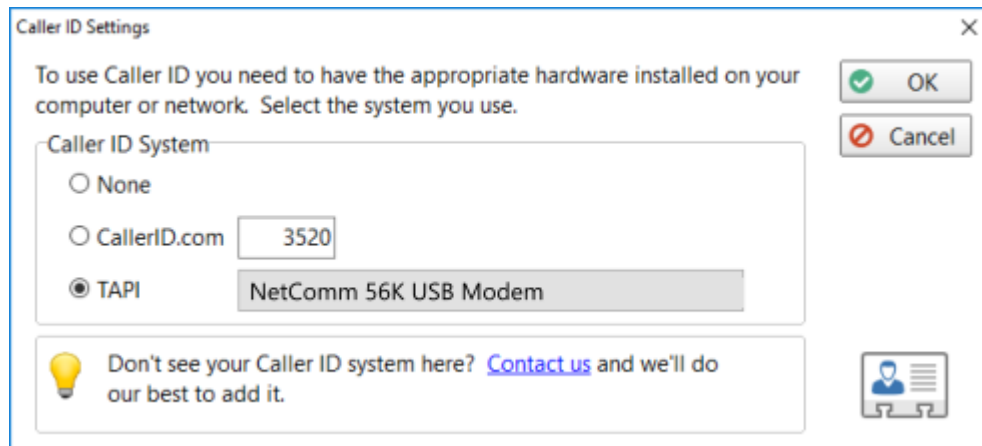


If you have problems with the Caller ID features make sure that your TAPI devices are 100% TAPI compatible and that you have the latest drivers. We have sometimes found that the default drivers installed by Windows don't work.

Configuring TAPI

If you have a TAPI device on your network you can configure PhonePad to receive the Caller ID data from it by selecting **Caller ID Settings** from the **View** menu, or by clicking the Caller ID Settings button on the **Settings** toolbar.

1. Select **TAPI** from the 3 options.
2. Select the TAPI-compliant device you have installed.
3. Click **OK**.



Caller Information

When you receive an incoming call this window will be displayed.

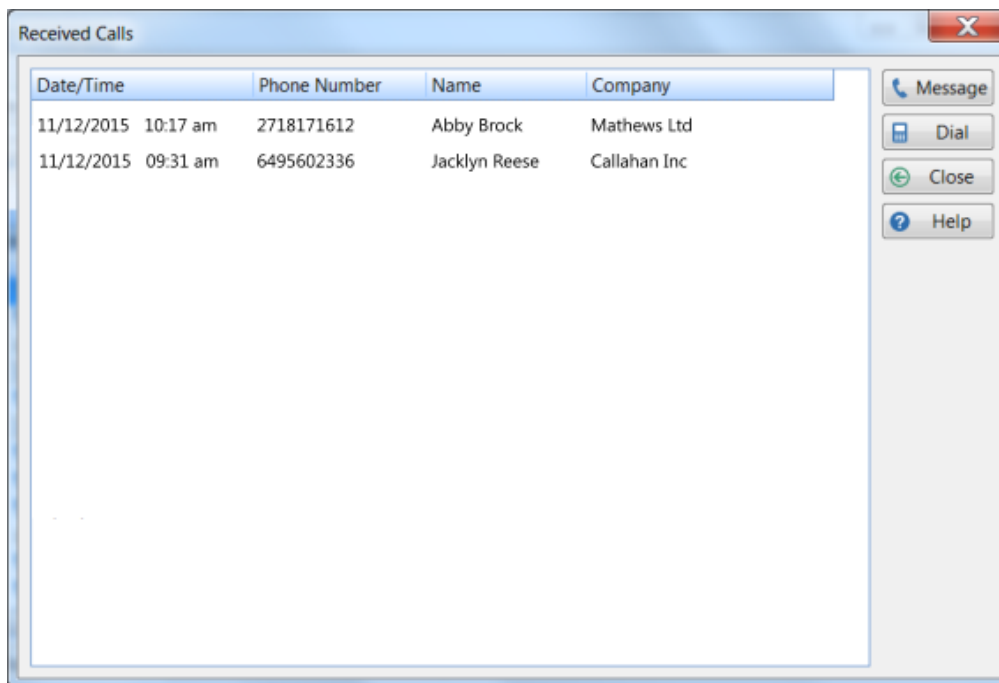


It shows the caller's phone number. PhonePad will also check the Address Book to see if the caller has called before. If they have, their information will be displayed.

If you click the **Take a Message** button PhonePad will open a new message and prefill the caller's details.

Received Calls

PhonePad keeps a history of all calls received, whether you're in the office or not (obviously PhonePad has to be left running). This feature is only available if you have a TAPI device connected.



This is a good way to check who has called while you've been out. You can then create phone messages for each of the missed calls by clicking the **Message** button.

You can call the user back using TAPI by clicking the **Dial** button.

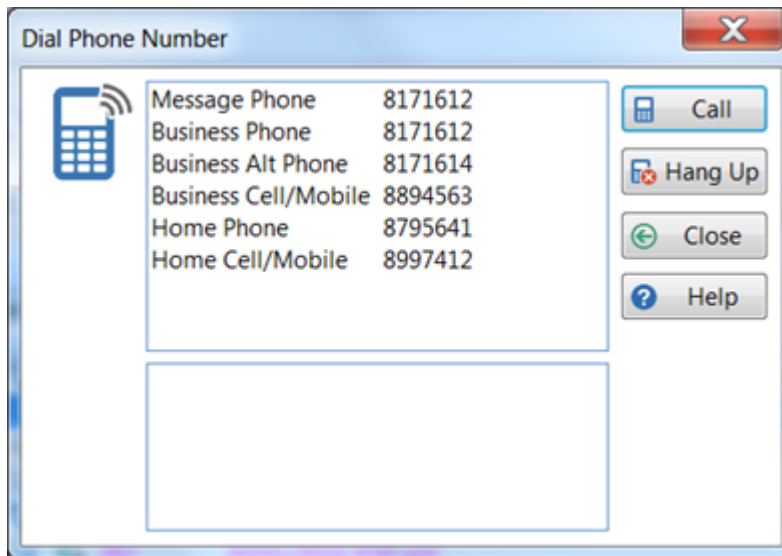
Dialling a Number

You can use the TAPI feature of PhonePad to call back callers.

Dialling a Number from the Inbox

Select a phone message in your Inbox and click the **Dial Number** button, or select **Dial Number** from the **File** menu.

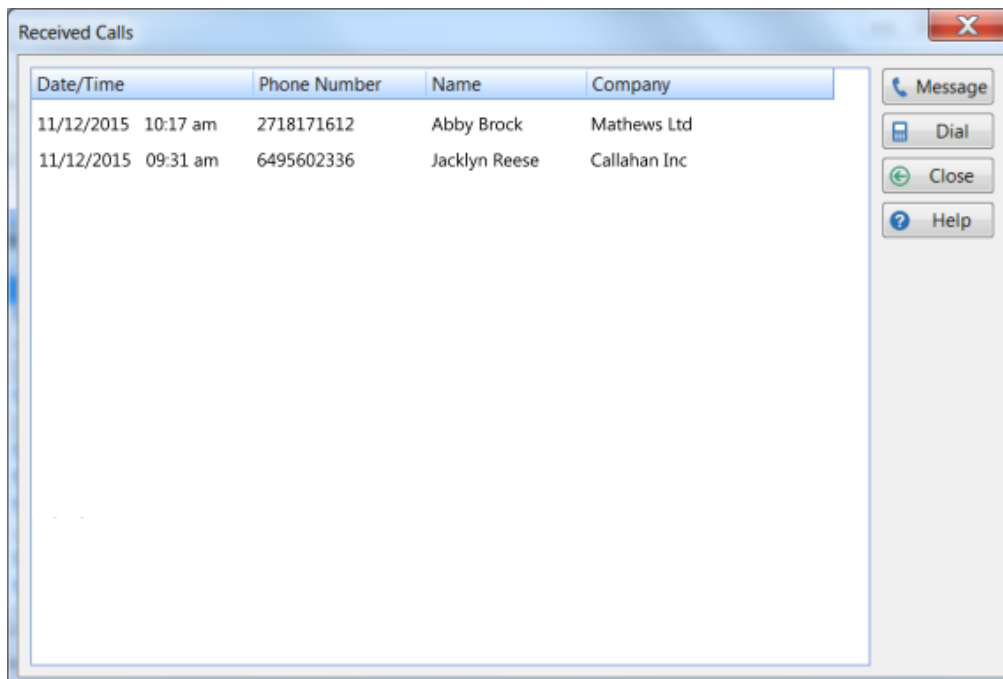
All available phone numbers for the caller will be displayed.



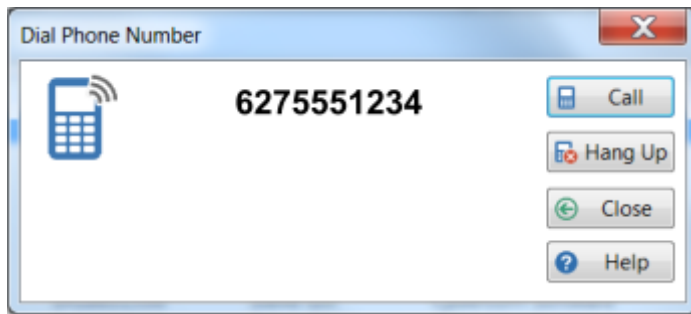
Select a number and then click the **Call** button.

Dialling a Number from Received Calls

From the Received Calls window click the **Dial** button.



The number of the selected call will be displayed. Click the **Call** button



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Chapter

8

Global Searching

Global Searching

In addition to the search feature that each message list has, there is a broader, global search option available.

Click the **Search** button on the **Home** toolbar, or select **Search** from the **Tools** menu, or press the <F3> key.



The **Global Search** screen allows you to search **all** messages in the database, including those that have been archived, by Caller, Company, Phone Number, Subject and Message Text.

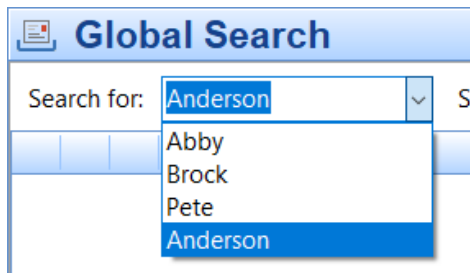
The screenshot shows the PhonePad 5 Global Search interface. The left sidebar contains a folder tree with 'Inbox' circled. The main window displays search results for 'abby' in the 'Caller' field. The results table is as follows:

ID	Date	Caller	Company	Subject	Phone	Reference	Identification
700	21/04/2018 11:58 am	Abby Delaney	Mcdonald Pty Ltd	Reschedule Appointm...	9884925		
701	21/04/2018 11:58 am	Abby Delaney	Mcdonald Pty Ltd	Reschedule Appointm...	9884925		
3074	4/02/2018 4:05 pm	Abby Mckinney	Stafford Corp	Late Payment.	6614732		
3075	4/02/2018 4:05 pm	Abby Mckinney	Stafford Corp	Late Payment.	6614732		
20392	3/03/2018 12:22 pm	Abby McLaughlin	Mcmahon and Associ...	Schedule an Appoint...	8153766		
20393	3/03/2018 12:22 pm	Abby McLaughlin	Mcmahon and Associ...	Schedule an Appoint...	8153766		
21317	28/12/2021 12:48 pm	Abby Drake	Fischer and Sons	Meeting on Friday.	6864659	!	
21318	28/12/2021 12:48 pm	Abby Drake	Fischer and Sons	Meeting on Friday.	6864659	!	

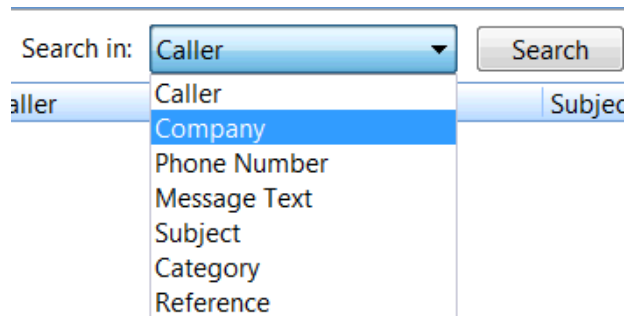
Below the table, it indicates 'Found 23 messages.' and shows a preview of a message with fields for To, From, Subject, Date, and Time.

Enter your search text in the **Search for** field, next select where you want to search using the **Search in** drop-down list, and finally click the **Search** button.

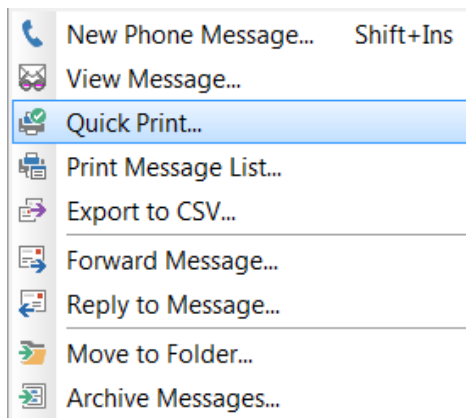
The **Search for** field remembers your previous searches so you can perform an earlier search by selecting the search text from the drop-down list.



Use the **Search in** drop-down list to select the field to search



Right-click on the Search message list to show the popup menu.



So once you have finished searching, how do you get back to the rest of PhonePad, like the Inbox. Simply select the **Inbox** folder, or click on the **Return to Inbox** link.

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Chapter

9

Passwords

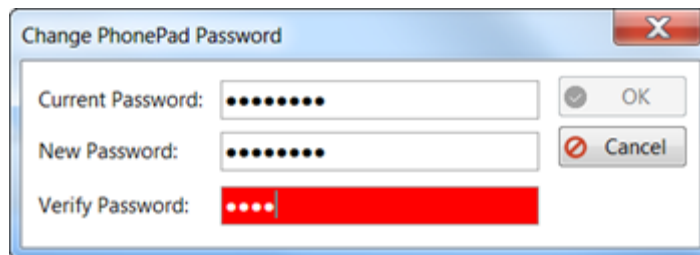
Passwords

Changing Your PhonePad Password

You can change your PhonePad 5 password at any time by clicking on the **Password** button on the **Settings** tab of the toolbar, or by selecting the **Password** button from the **Tools** menu.



The Password window will appear.

A screenshot of a dialog box titled "Change PhonePad Password". The dialog has a blue title bar with a red close button (X) on the right. It contains three text input fields: "Current Password:" with seven black dots, "New Password:" with seven black dots, and "Verify Password:" with four black dots followed by a red rectangular area. To the right of the "Current Password" field is an "OK" button with a checkmark icon. To the right of the "New Password" field is a "Cancel" button with a red circle and slash icon.

You will not be able to enter a new password until you enter your current password. Once you have entered your current password, enter your new password. You will need to enter this twice to verify that it is correct.

Click **OK** to save the new password.

Chapter

10

Preferences

Preferences

You can customize many parts of PhonePad via user preferences.

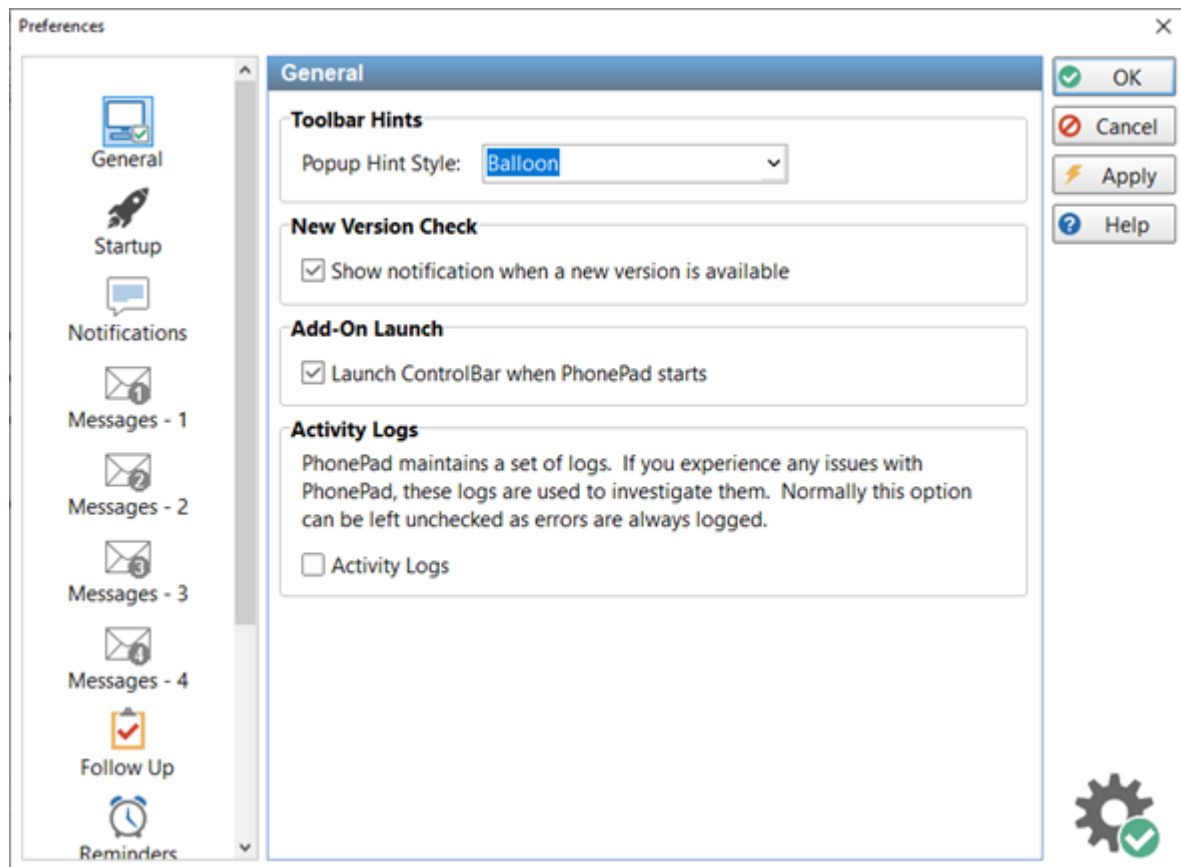
To access *Preferences*, click on the **Preferences** button on the **Settings** tab on the toolbar, or select **Preferences** from the **View** menu.



The Preferences window will be displayed.

General

Select the **General** option for *General* settings.

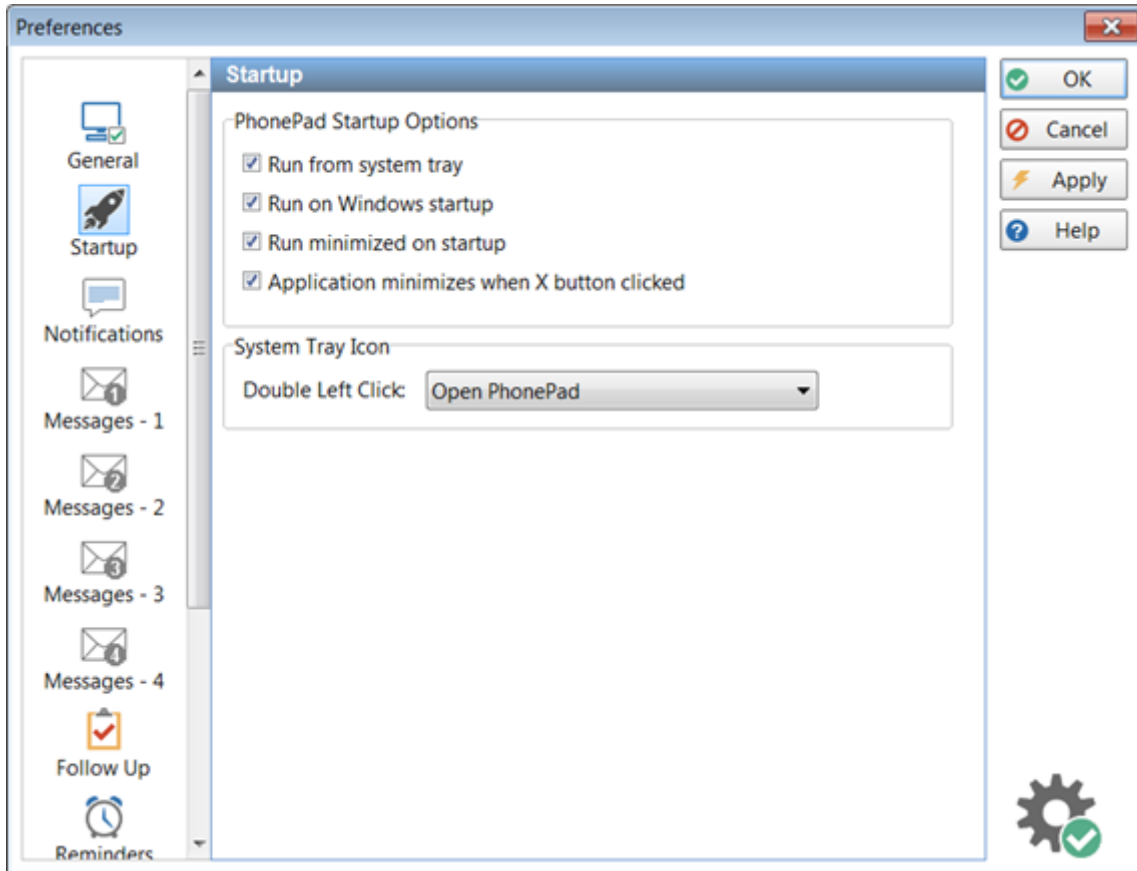


Toolbar Hints

Popup Hint Style	This setting affects the appearance of the popup hints displayed when you hover the mouse over toolbar buttons.
New Version Check	
Show notification when a new version is available	Displays a popup message when a new version of PhonePad 5 is available for download. This option only appears for administrators.
Add-On Launch	
Launch Control Bar When PhonePad Starts	When checked, the Control Bar will start when PhonePad starts.
Launch ToDo List When PhonePad Starts	When checked, the ToDo List will start when PhonePad starts.
Activity Logs	
Activity Logs	When checked, PhonePad will log lots of different processes. To improve system performance this is normally left unchecked. However, it may need to be checked for support purposes. Errors are always logged regardless of this setting.

Startup

Select the **Startup** option for PhonePad startup settings.

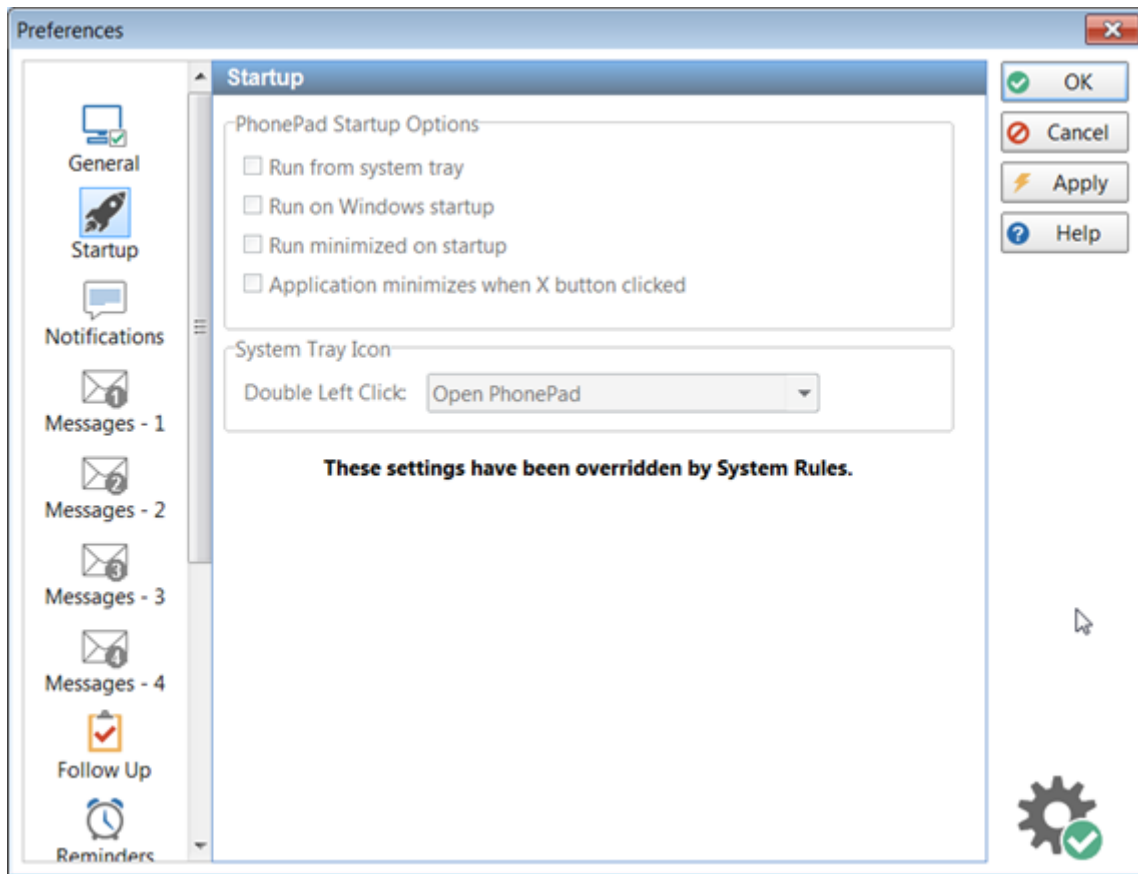


PhonePad Startup Options	
Run from system tray	When checked, PhonePad will run from the system tray.
Run on Windows startup	When checked, PhonePad will start automatically when Windows starts.
Run minimized on startup	When checked, PhonePad will minimize when it starts.
Application minimizes when X button clicked	When checked, PhonePad will minimize instead of closing when the X (close button) is clicked.
System Tray Icon	
Double Left Click	<p>You can specify what happens when a user double-clicks on the PhonePad icon in the system tray:</p> <ul style="list-style-type: none"> • Open PhonePad • Create a New Phone Message • Create a New Outgoing Message

- | | |
|--|---|
| | <ul style="list-style-type: none"> • Create a New Text Message • Display Address Book |
|--|---|

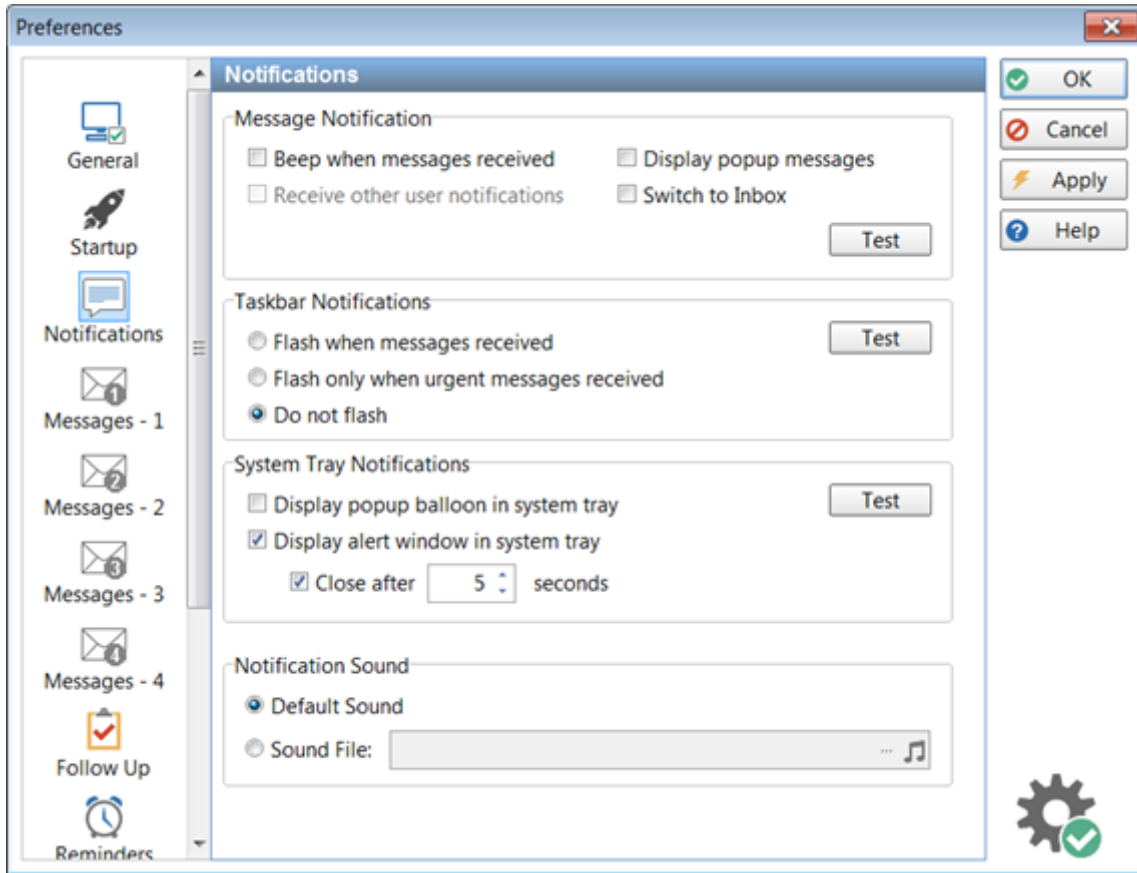
Overridden Settings

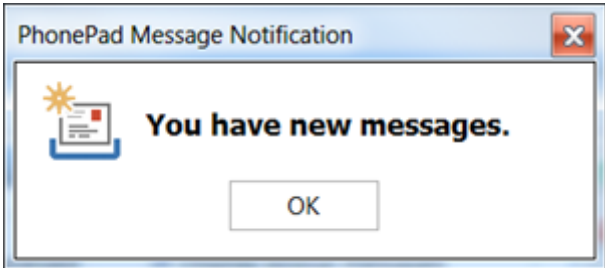
Your PhonePad system administrator can override these settings using **System Rules**. If this has been done then you will be unable to change any of these settings.

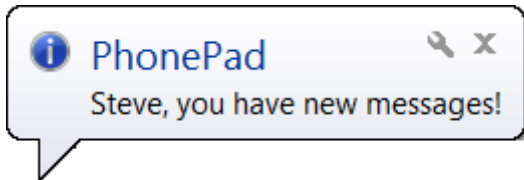
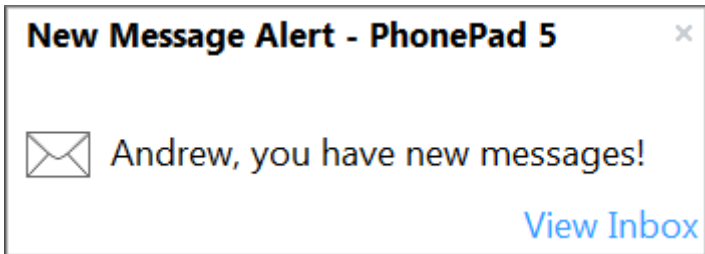


Notifications

The **Message Notification** options can alert you whenever a new message arrives in your Inbox.



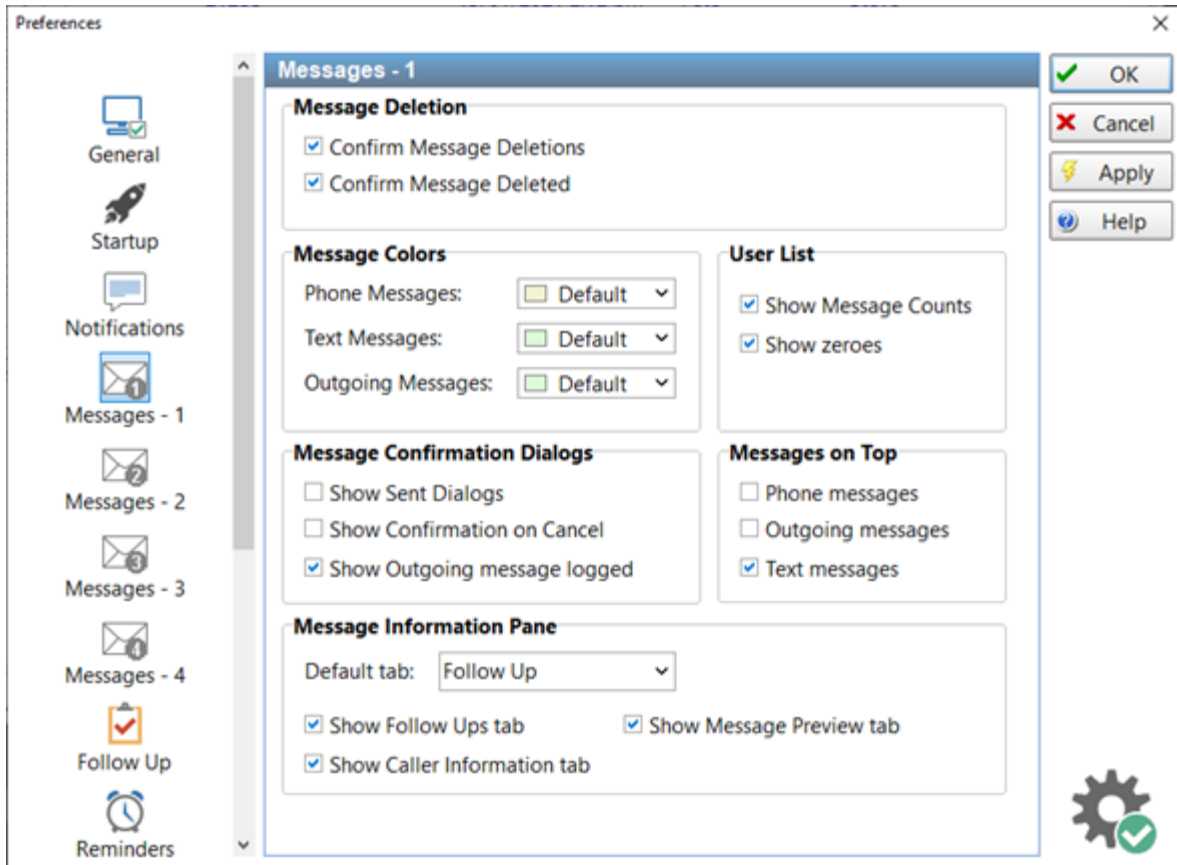
Message Notification	
Beep when messages received	A standard Windows beep will sound whenever a new message is received in your Inbox. If you select a Notification Sound then that sound will be heard.
Display popup messages	Displays a popup message when a new message is received in your Inbox. <div style="text-align: center; border: 1px solid #ccc; padding: 10px; width: fit-content; margin: 0 auto;">  </div>
Receive other user notifications	This option is only enabled if you have access to other user's folders. When checked, you can receive new message notifications for other users. However, you have to have the user selected in the user list to receive their new message

	<p>notifications. This means that you can only receive notifications for one user at a time. To receive notifications for all users you will need to use the soon-to-be-released MessageAlert application (which will be included in an update).</p>
Switch to Inbox	<p>When checked, PhonePad automatically switches to the Inbox when new messages are received.</p>
Test	<p>Click the Test button to test these settings.</p>
Taskbar Notifications	
Flash when messages received	<p>PhonePad's icon on the taskbar flashes when a new message is received in your Inbox.</p>
Flash only when urgent messages received	<p>PhonePad's icon on the taskbar flashes only when a new urgent message is received in your Inbox.</p>
Do not flash	<p>Flashing is disabled.</p>
Test	<p>Click the Test button to test these settings.</p>
System Tray Notifications	
Display popup balloon in system tray	<p>When checked, a popup balloon will be displayed in the system tray.</p> 
Display alert window in system tray	<p>When checked, an alert window will be displayed in the system tray whenever new messages are received.</p> 

Close after x seconds	<p>When checked, the New Message Alert window will automatically close after the specified number of seconds. The minimum is 5 seconds and the maximum is 30 seconds. The default is 5 seconds.</p> <p>If unchecked, the message alert window won't close until you close it.</p>
Test	Click the Test button to test these settings.
Notification Sound	
Default sound	When selected, plays the default Windows beep when a new message is received.
Sound file	<p>Instead of using the default Windows beep for alerting you about new messages, you can play a WAV file. Click on the button and select the WAV file to play. 30 sounds are included with PhonePad but you can also add your own. It's best to using a sound file that has a short duration.</p> <p>Click the sound button to preview the sound.</p>

Messages - 1

Messages-1 contains the first of a number of message settings.

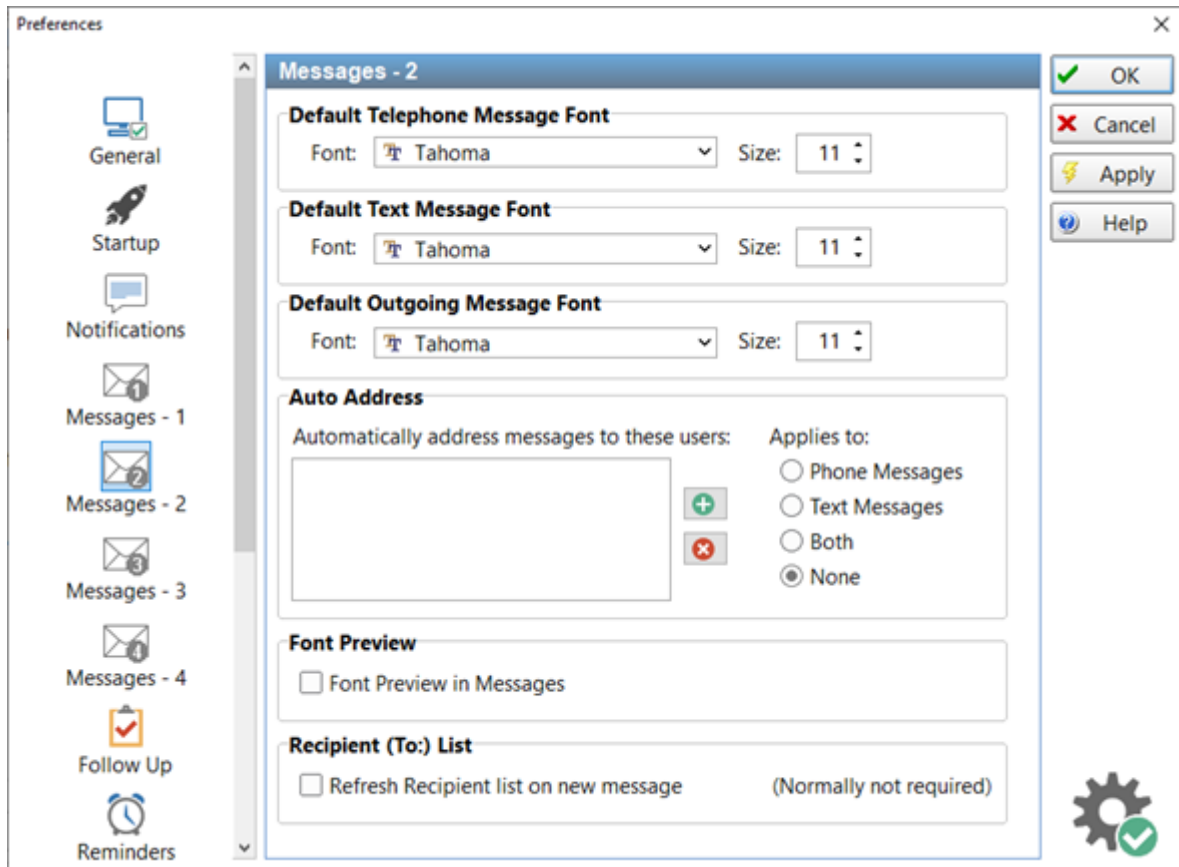


Message Deletion	
Confirm Message Deletions	When checked, you will be prompted to confirm any message deletions.
Confirm Message Deleted	When checked, a message will be displayed when a message is deleted.
Message Colors	
Phone Messages	Set the color of the Phone message form.
Text Messages	Set the color of the Text message form.
Outgoing Messages	Set the color of the Outgoing message form.
Message Confirmation Dialogs	

Show Sent Dialogs	When checked, a message will be displayed when a message has been sent.
Show Confirmation on Cancel	When checked, you will be prompted to confirm a message cancellation.
User List	
Show Message Counts	When checked, the User List will display message counts for Unread Messages and Uncompleted Follow Ups.
Show Zeroes	When checked, and <i>Show Message Counts</i> is checked as well, zeroes will be displayed where the user has no Unread Messages and/or Uncompleted Follow Ups. If unchecked, blank spaces will be shown instead of zeroes.
Message Information Pane	
Default Tab	Specifies which tab should be selected by default when PhonePad starts.
Show Follow Ups Tab	When checked, the Follow Ups tab will be displayed in the Message Information Pane located below the Inbox messages list.
Show Caller Information Tab	When checked, the Caller Information tab will be displayed in the Message Information Pane located below the Inbox messages list.
Show Message Preview Tab	When checked, the Message Preview tab will be displayed in the Message Information Pane located below the Inbox messages list.

Messages - 2

Messages-2 contains additional message settings.



Default Telephone Message Font

Font	Specifies the default font to be used for message text of new Phone messages.
Size	Specifies the default font size to be used for message text of new Phone messages.

Default Text Message Font

Font	Specifies the default font to be used for message text of new Text messages.
Size	Specifies the default font size to be used for message text of new Text messages.

Default Ongoing Message Font

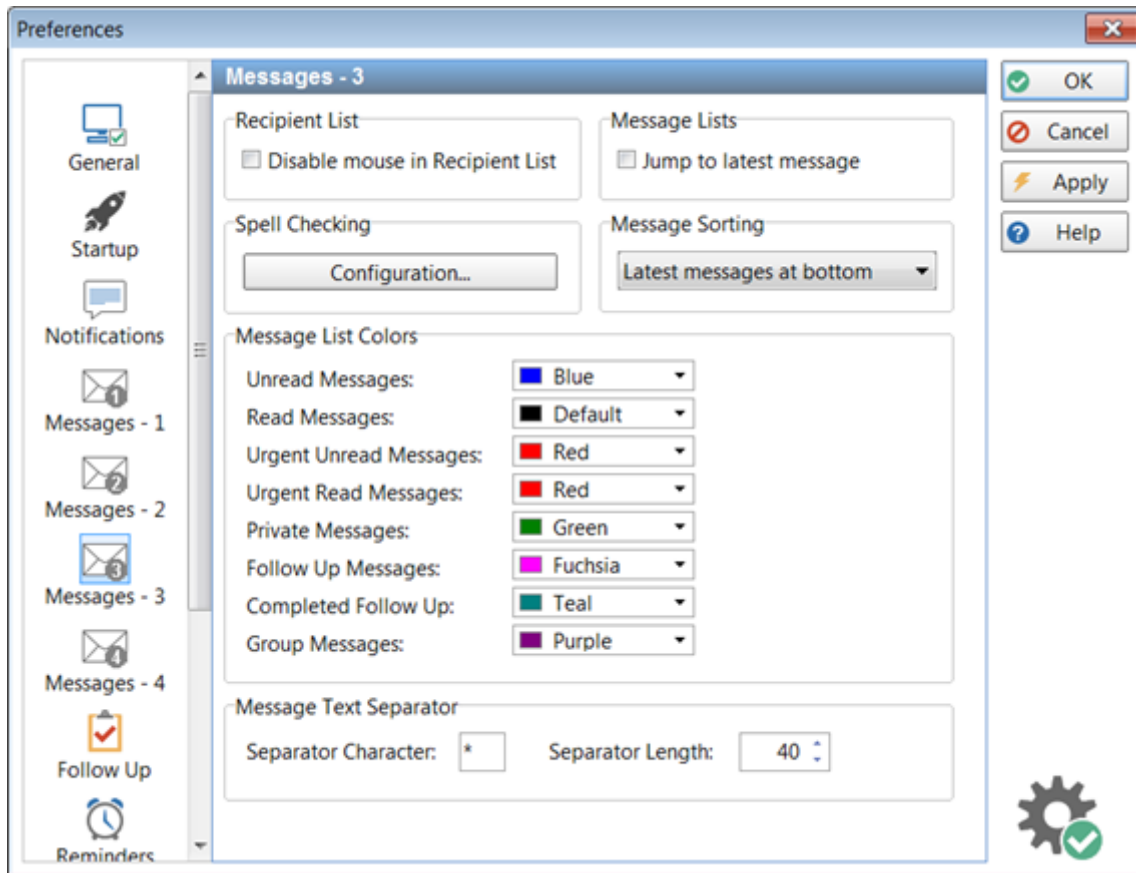
Font	Specifies the default font to be used for message text of new Outgoing messages.
Size	Specifies the default font size to be used for message text of new Outgoing messages.

Auto Address

Automatically address messages to these users	<p>The auto address feature allows you to automatically add recipients to new messages. If you tend to send messages to the same recipients all the time, this option can save you a bit of time by adding the recipients for you. Use the plus and minus buttons to add or remove users to/from the list.</p> <p>Select the type of messages this applies to.</p>
Font Preview	
Font Preview in Messages	<p>When checked, the font drop-down list will display a preview of the font in a small window in Phone, Outgoing and Text messages.</p>
Recipient (To:) List	
Refresh Recipient List on New Message	<p>If you have added some new users and they are not appearing in the To list then you can use this option to force them to appear. You won't normally need to do this as the recipient list is usually updated automatically.</p>

Messages - 3

Messages-3 contains additional message settings.



Recipient List

Disable mouse in Recipient List

When checked, the mouse cannot be used to select names in the Recipient List in telephone messages. This option is generally used to prevent accidental selection of names when using the keyboard for recipient selection.

Message Lists

Select latest message

When checked, the Inbox message list will always scroll to the latest message when new messages are received.

Spell Checking

Configuration

Allows you to specify the settings for Spell Checking.

Message Sorting

Message Sorting

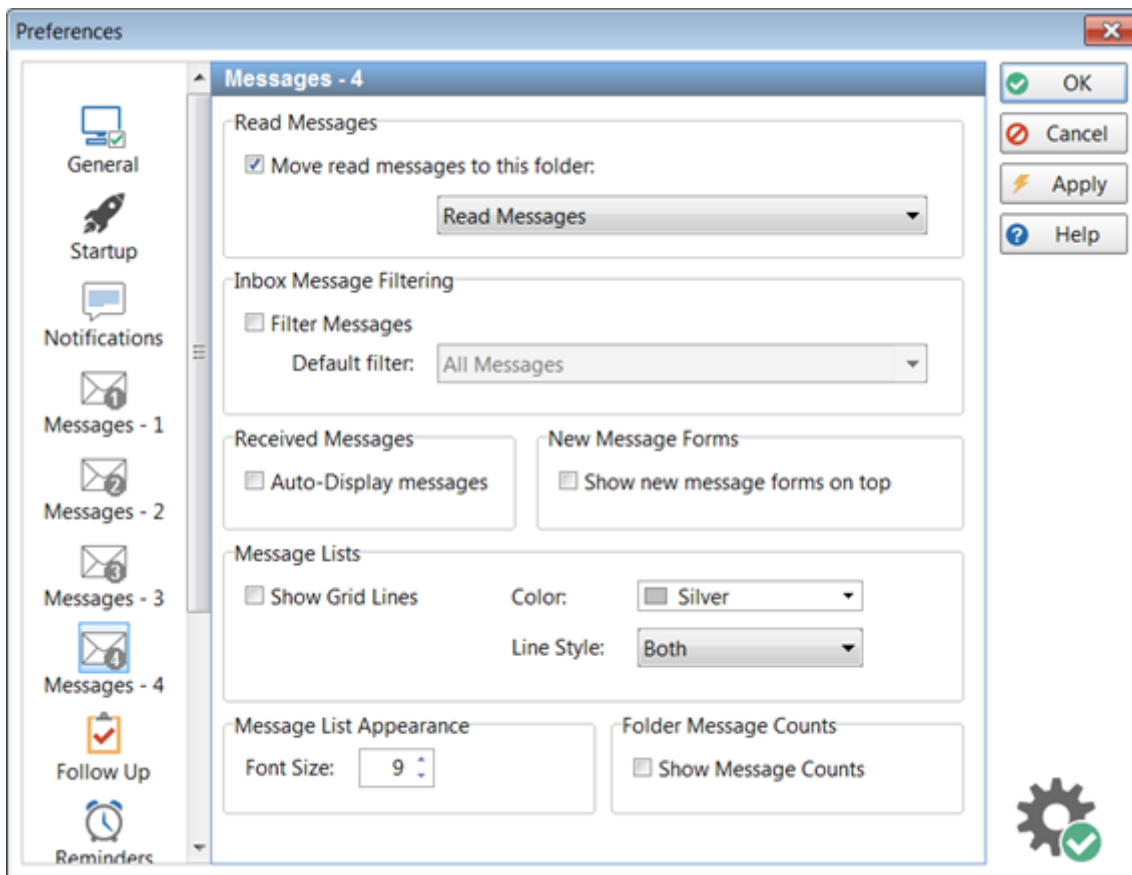
This option allows you to specify the sort order of all message lists in PhonePad, including the Follow Up Notes list. You can set this option to either display the newest messages at the bottom of the list or the top.

Message List Colors

Unread Messages	Defines the text color to be used for Unread Messages in message lists.
Read Messages	Defines the text color to be used for Read Messages in message lists.
Urgent Unread Messages	Defines the text color to be used for Unread Urgent Messages in message lists.
Urgent Read Messages	Defines the text color to be used for Read Urgent Messages in message lists.
Private Messages	Defines the text color to be used for Private Messages in message lists. Affects only unread messages. Read messages will appear in the Read Messages color.
Follow Up Messages	Defines the text color to be used for Follow Up Messages in message lists.
Completed Follow Up	Defines the text color to be used for Completed Follow Ups in message lists.
Group Messages	Defines the text color to be used for Group Messages in message lists. Affects only unread messages. Read messages will appear in the Read Messages color.

Messages - 4

Messages-4 contains additional message settings.

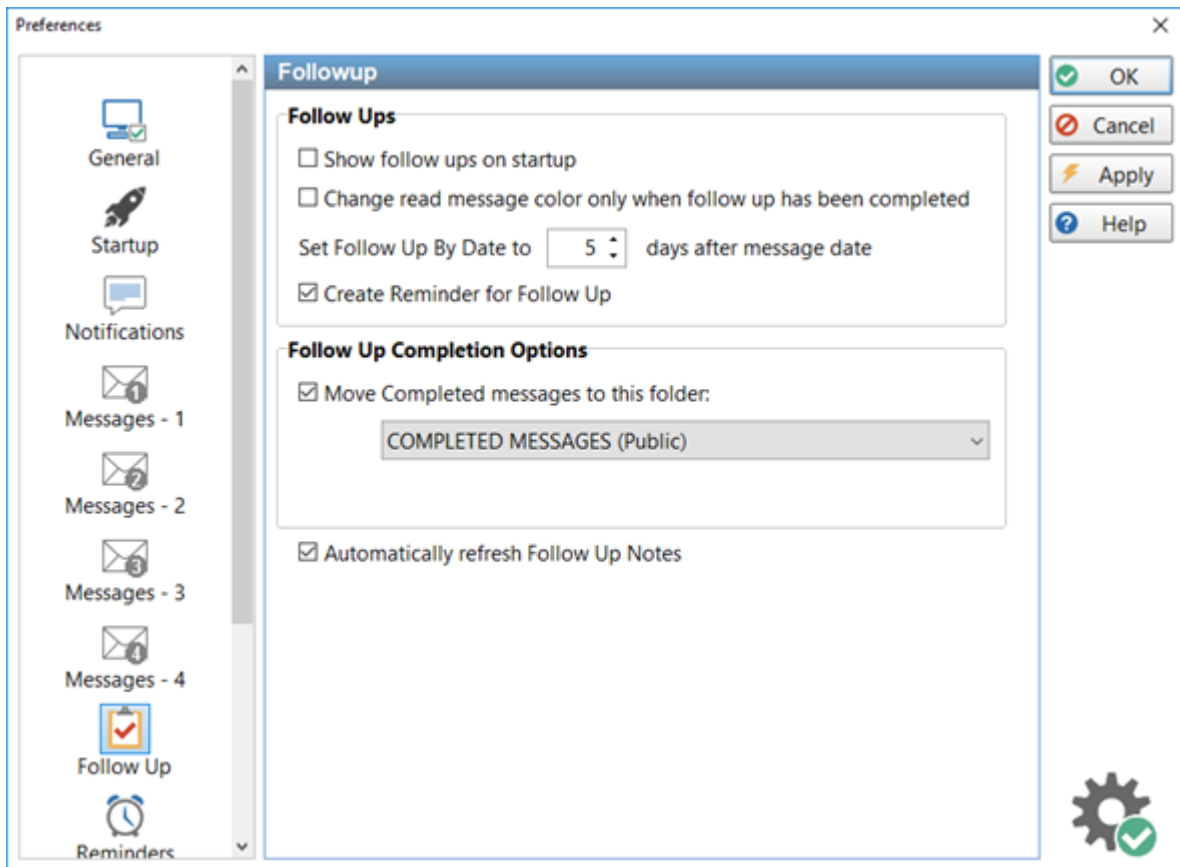


Read Messages	
Move read messages to this folder	When checked, when you finish reading a message it will automatically be moved to the folder you specify.
Inbox Message Filtering	
Filter Messages	When checked, the Inbox will apply the Default Filter when PhonePad starts.
Received Messages	
Auto-Display Messages	When checked, new messages received will automatically be displayed as they are received.
New Message Forms	
Show new message forms on top	When checked, new messages will be displayed on top of the main window.
Message Lists	

Show Grid Lines	When checked, grid lines will be displayed in each message list, based on the settings below.
Color	Specifies the color of the lines.
Line Style	Specifies the lines to be displayed: Horizontal, Vertical, or Both.
Message List Appearance	
Font Size	Allows you to specify the font size used in all message lists.

Follow Up

The **Follow Up** page contains options for customizing message Follow Up settings.

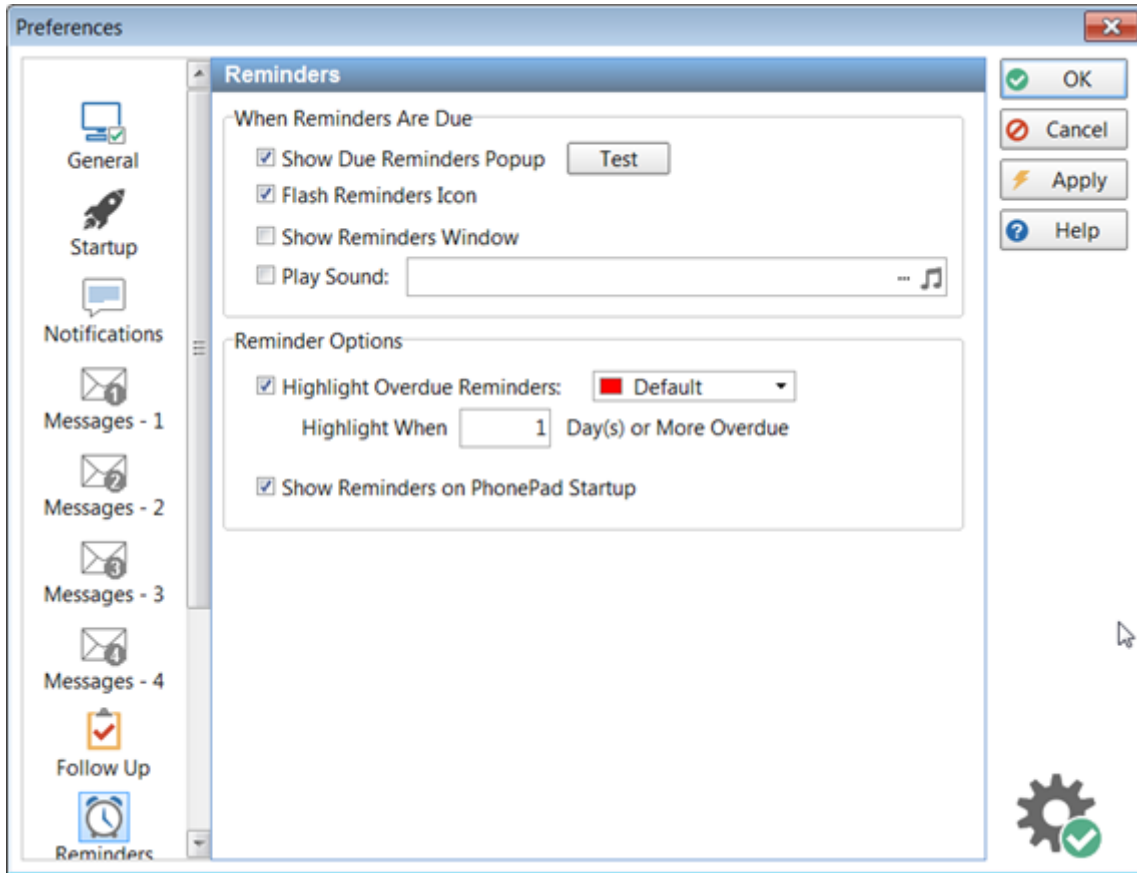


Follow Ups	
Show follow ups on startup	When checked, the Inbox will be filtered to show messages that require follow up. This overrides the Inbox Message Filtering option.

Change read message color when follow up has been completed	Normally, the color of a message will change in the Inbox message list when the message has been read. If this option is checked, the color will only change when the message has been followed up.
Set Follow Up By Date to x days after message date	Sets the default Follow Up By Date to the specified number of days after the current date, when the Follow Up By check box is checked.
Create Reminder for Follow Up	When checked, a reminder will be automatically created when you mark a message for follow up. If you then unmark the message for follow up, or complete the follow up, the reminder will be automatically deleted.
Follow Up Completion Options	
Move Completed messages to this folder	When checked, when a Follow Up is marked as Completed it will be moved to the specified folder.
Automatically refresh Follow Up Notes	When checked, the Follow Up Notes will be automatically refreshed. Otherwise, you may occasionally need to refresh it manually.

Reminders

Reminders are an important part of PhonePad. You can customize some of their behavior here.

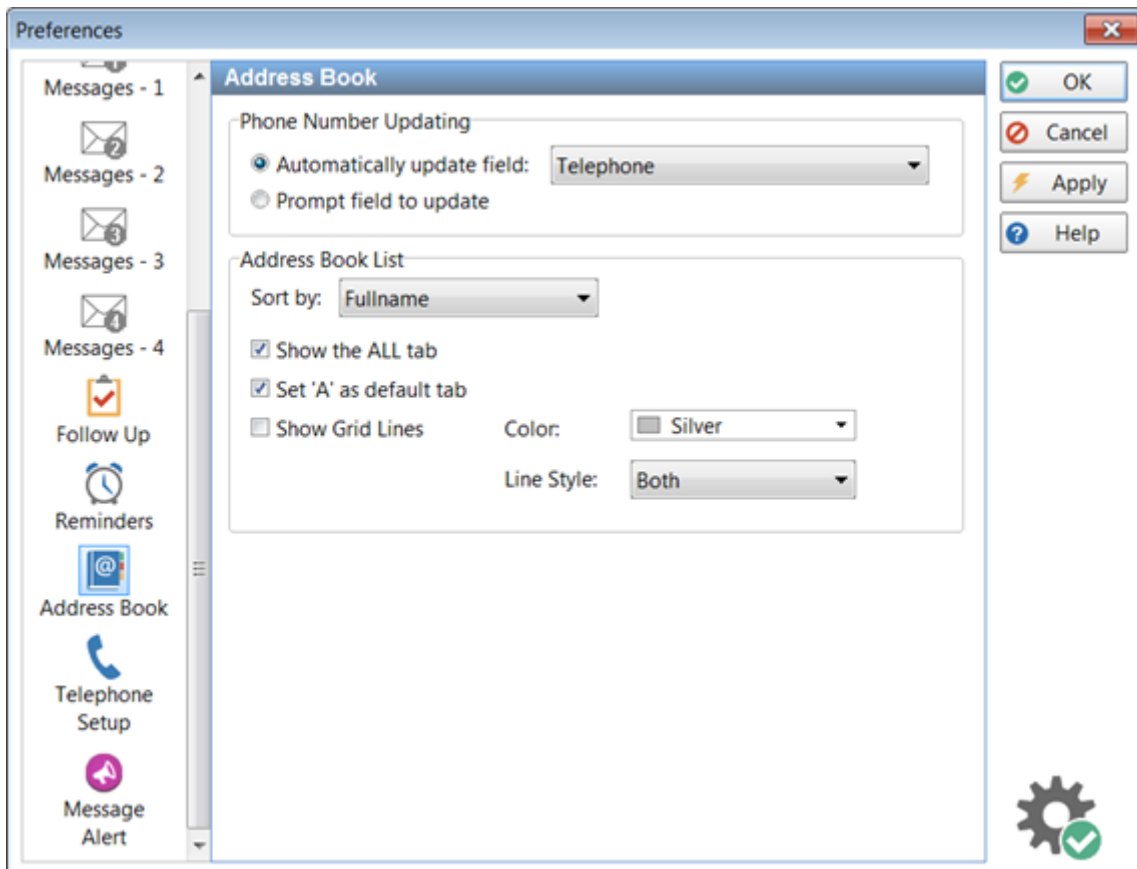


When Reminders Are Due	
<p>Show Due Reminders Popup</p>	<p>When checked, a reminder popup will be displayed above the system tray.</p> <div data-bbox="553 1318 1084 1566" data-label="Image"> </div> <p>Use the Test button to test this setting.</p>
<p>Flash Reminders Icon</p>	<p>When checked, the reminders icon on the status bar will flash.</p>
<p>Show Reminders Window</p>	<p>When checked, the reminders window will be displayed when a reminder is due.</p>

Play Sound	When checked, the selected sound will play when a reminder is due.
Reminder Options	
Highlight Overdue Reminders	When checked, overdue reminders will be highlighted in the reminders window using the selected color.
Highlight When x Days(s) or More Overdue	When checked, reminders will be highlighted when they are the specified number of days overdue.
Show Reminders on PhonePad Startup	When checked, due reminders will be displayed when PhonePad starts.

Address Book

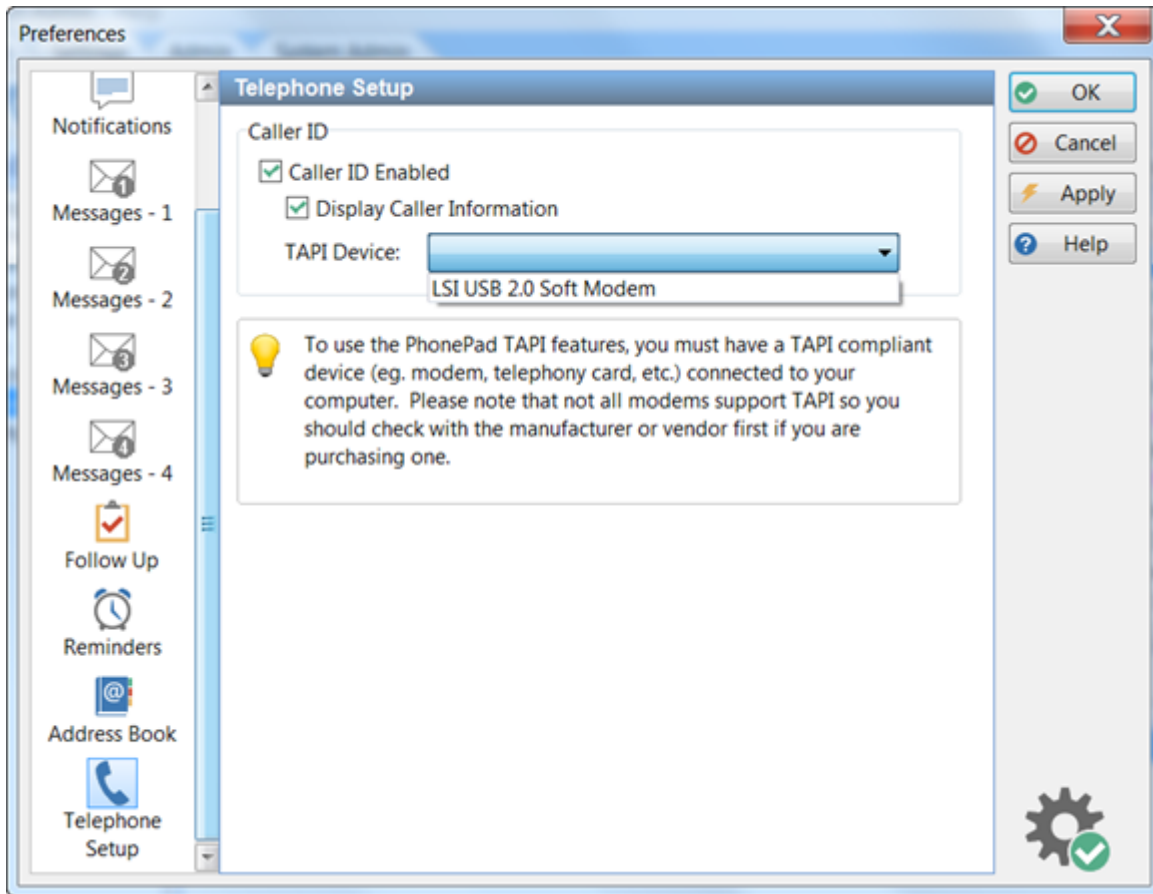
These settings apply to the PhonePad Address Book.



Phone Number Updating	
Automatically update field	When selected, automatically updates the specified field in the Address Book whenever the phone field is changed in a phone message. You can set it to update the Telephone, Alt. Phone, Fax, or Cell/Mobile field.
Prompt field to update	When selected, you will be prompted for the appropriate field to update in the Address Book.
Address Book List	
Sort by	Use this option to set how you want the Address Book window sorted. Select from Firstname, Lastname, Fullname or Company.
Show the ALL tab	When checked, the ALL tab will be displayed, allowing you to view all Address Book entries at once. Uncheck this option to improve performance if you have a large Address Book.
Show Lines	When checked, the Address Book list will have horizontal and vertical lines making it easier to view.
Set 'A' as default tab	When checked, the 'A' tab will be displayed when you open the Address Book instead of the 'ALL' tab. The Address Book will load the entries faster.

Telephone Setup

This page relates to Caller ID functionality within PhonePad 5.



Caller ID	
Caller ID Enabled	When checked, the Caller ID feature will be enabled.
Display Caller Information	When checked, the Caller Information window will be displayed when a phone call is received.
TAPI Device	When checked, the reminder is enabled.

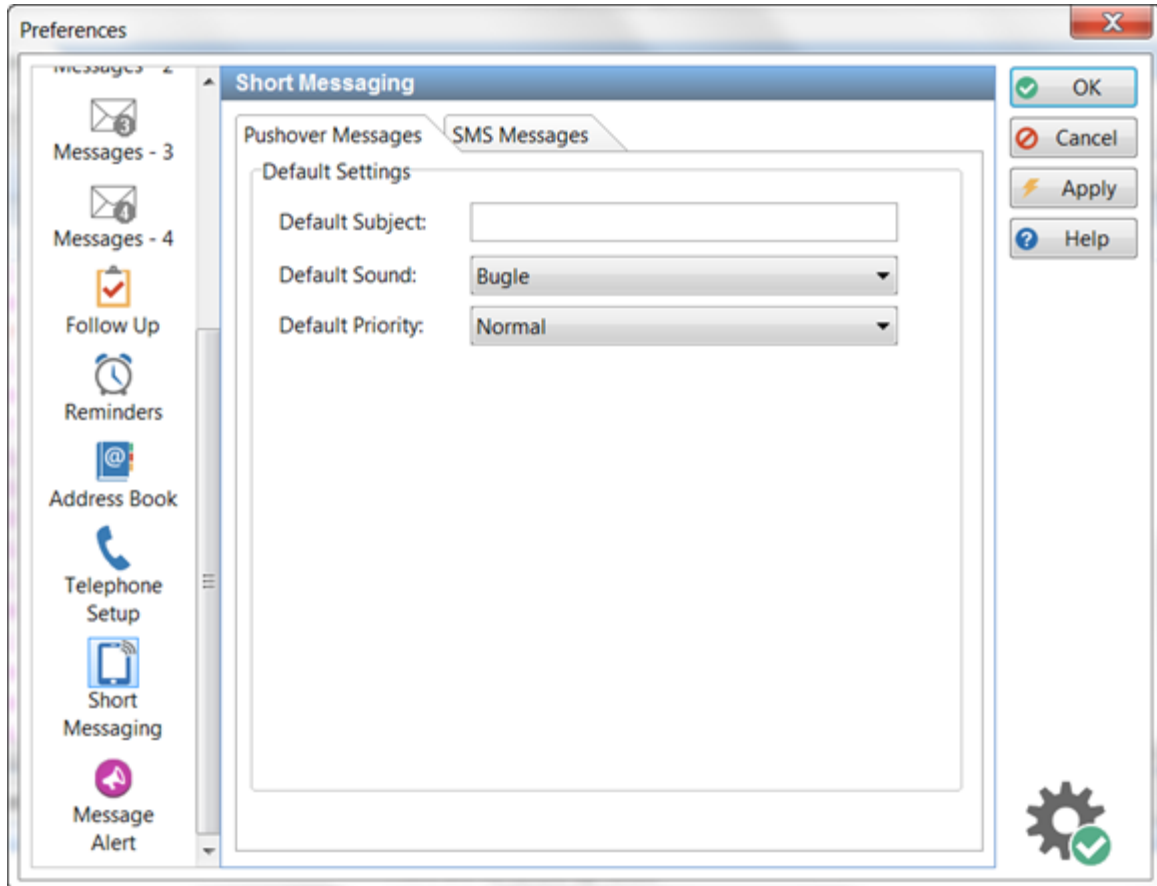
Short Messaging

Short messaging gives you the ability to send quick, ad-hoc messages to cell phones and mobile devices that have an Internet connection. Currently you can send SMS messages and also messages via Pushover (which are free for up to 7500 messages per month).

Please note: This is different from the Automatic Message Forwarding feature.

Pushover Messages

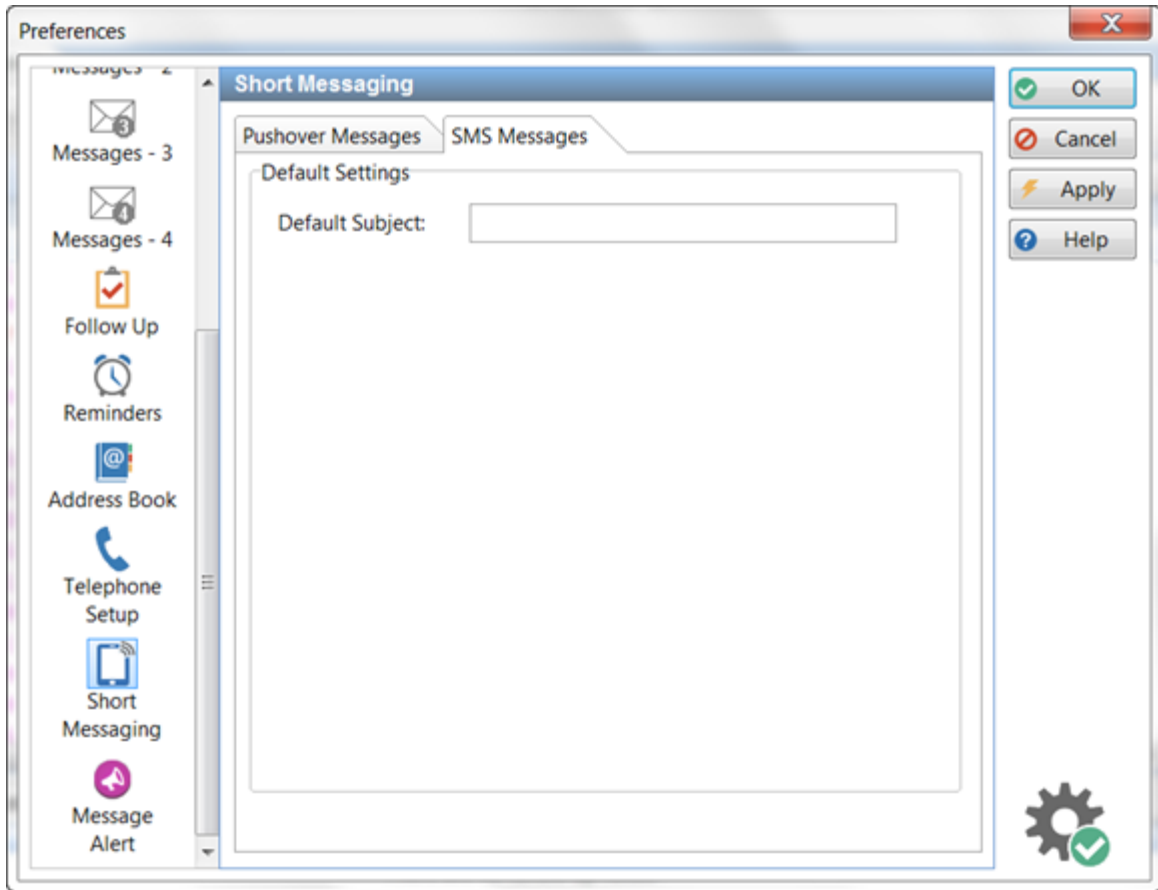
There are optional default settings you can set for Pushover messages.



Default Subject	This text will be automatically added to all new Pushover messages.
Default Sound	This is the default sound that will be played on the receiver's mobile device, eg. cell phone.
Default Priority	Sets the default priority for all new messages.

SMS Messages

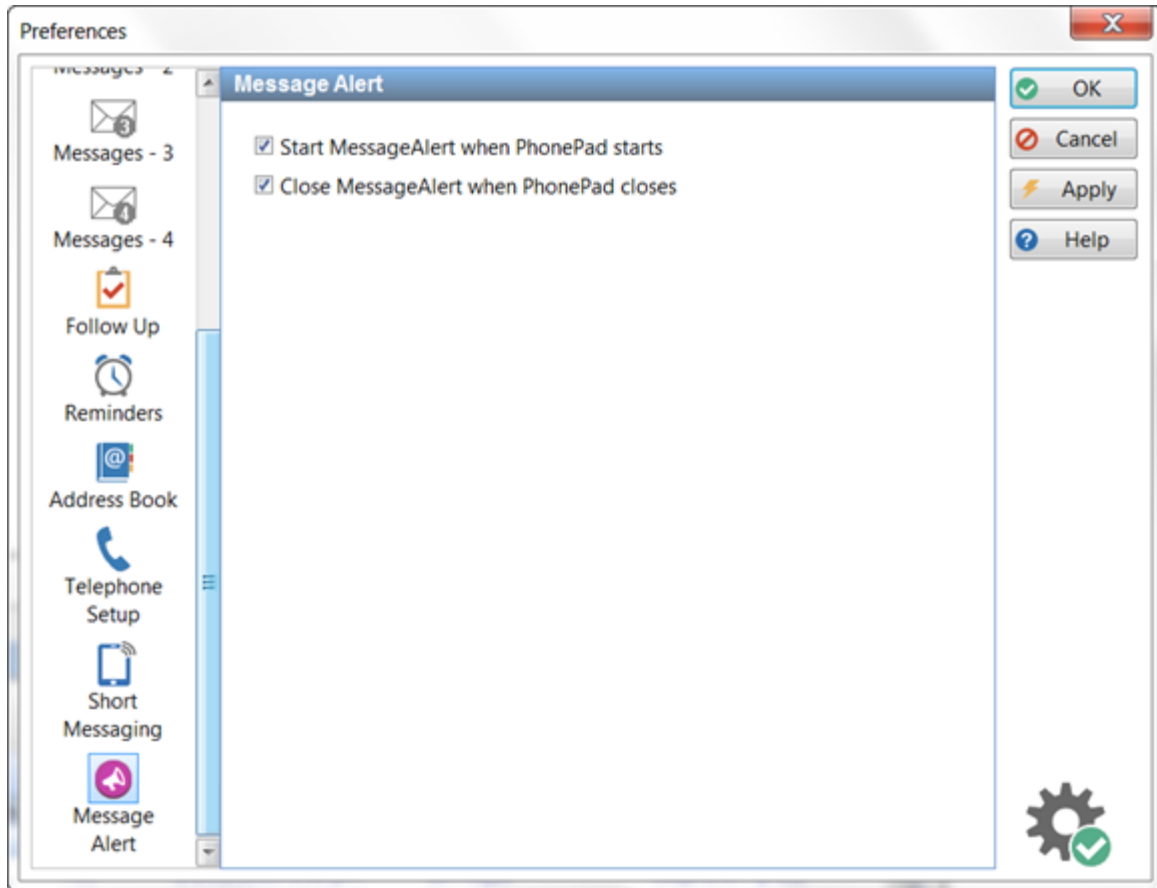
There are optional default settings you can set for SMS messages.



Default Subject	This text will be automatically added to all new SMS messages.
------------------------	--

Message Alert

These settings enable you to start and stop Message Alert automatically.

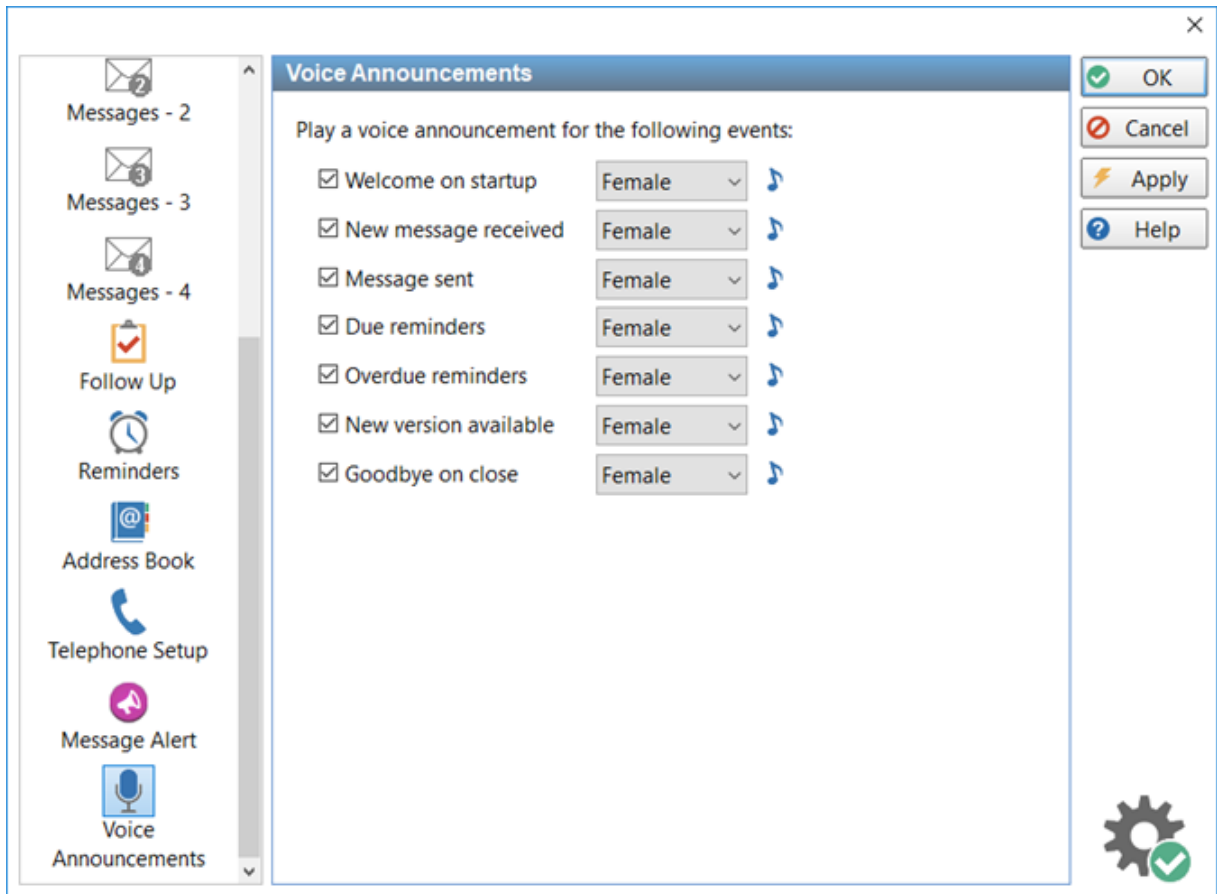


Start Message Alert when PhonePad starts	When checked, PhonePad will launch Message Alert for you on startup.
Close Message Alert when PhonePad closes	When checked, PhonePad will close Message Alert when you exit PhonePad.

Voice Announcements

With the **Voice Announcements** settings you can have PhonePad greet you when you log in, say goodbye when you log out, let you know when you have new messages, and more.

You can select either a Female or Male voice for each announcement. Click the musical note button to preview the selecting announcement.



Welcome on startup	When checked, PhonePad will greet you when you log in.
New message received	When checked, PhonePad you tell you when there are new messages.
Message sent	When checked, you will receive a voice notification when a message is sent.
Due reminders	When checked, due reminders will be announced
Overdue reminders	When checked, overdue reminders will be announced.
New version available	When checked, PhonePad will let you know if there is a new version available.
Goodbye on close	When checked, PhonePad will farewell you when you log out.

This page intentionally left blank.

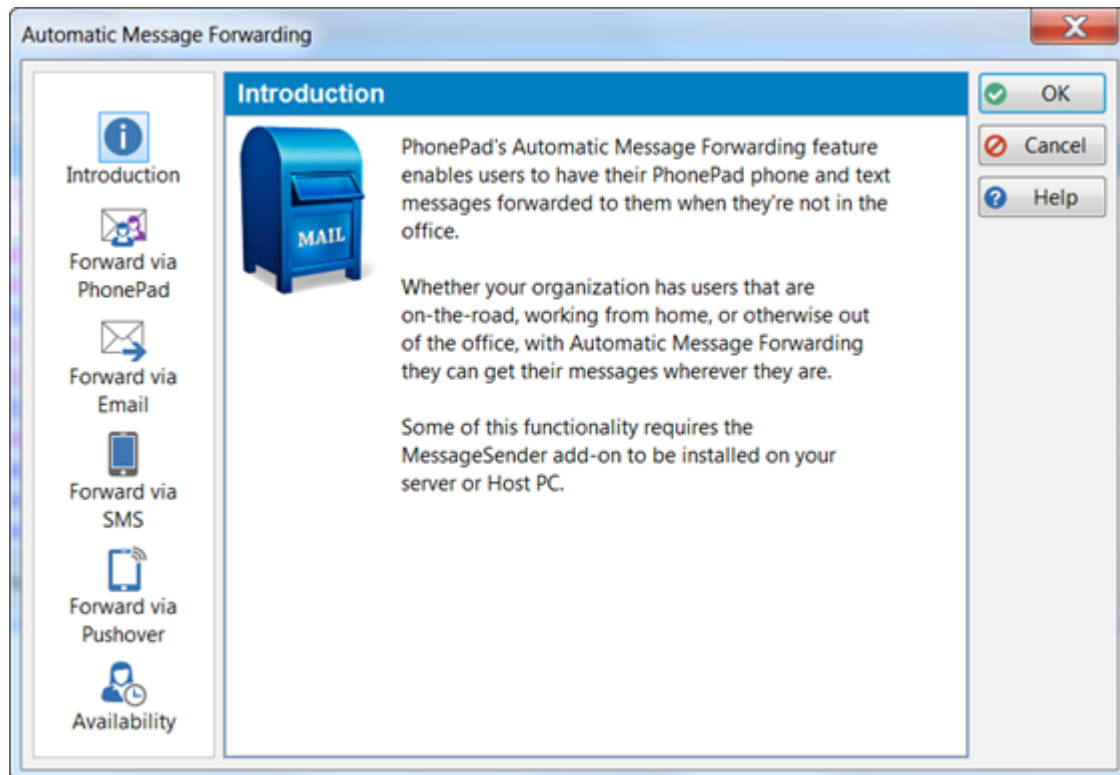
Chapter

11

Automatic Message Forwarding

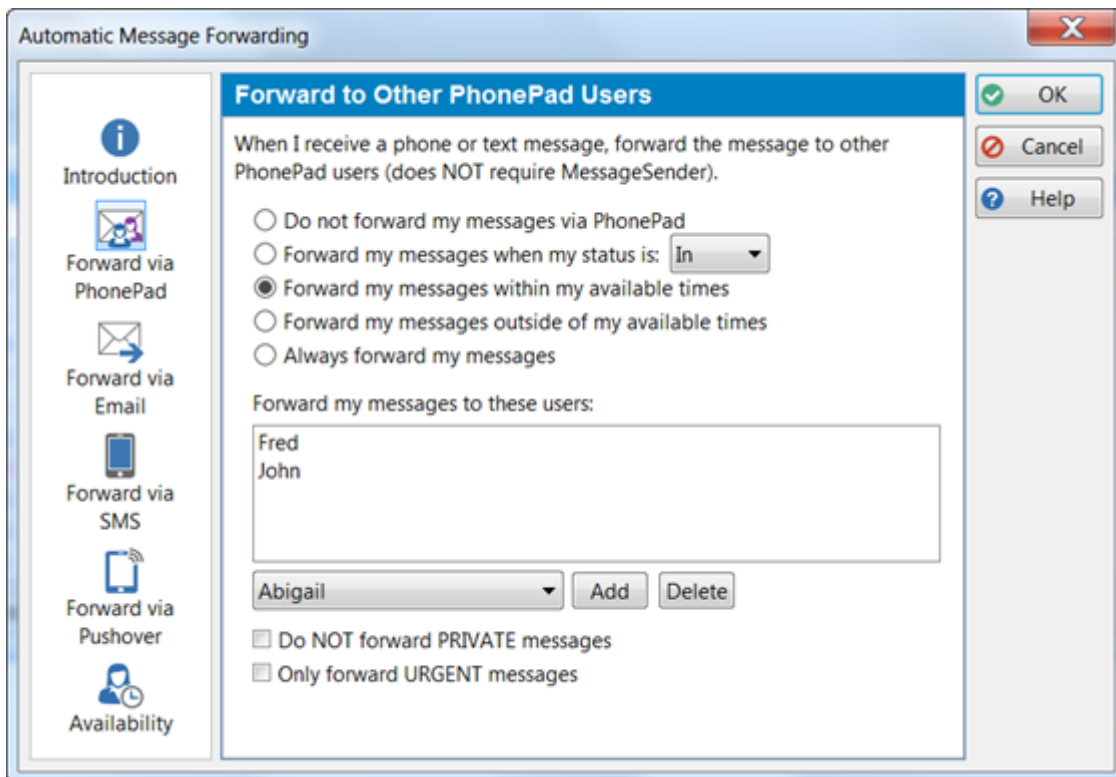
Automatic Message Forwarding

Automatic Message Forwarding allows you to receive your PhonePad 5 messages via email, or have them sent directly to your cell/mobile phone using SMS or Pushover. This is ideal for users that work remotely, are on the road, or are temporarily out of the office. To use this feature your PhonePad administrator must install MessageSender and configure PhonePad to use Automatic Message Forwarding.



Forward to Other PhonePad Users

If you're away from the office for an extended period then you might want to have your messages forwarded to other users who can handle the messages for you in your absence.



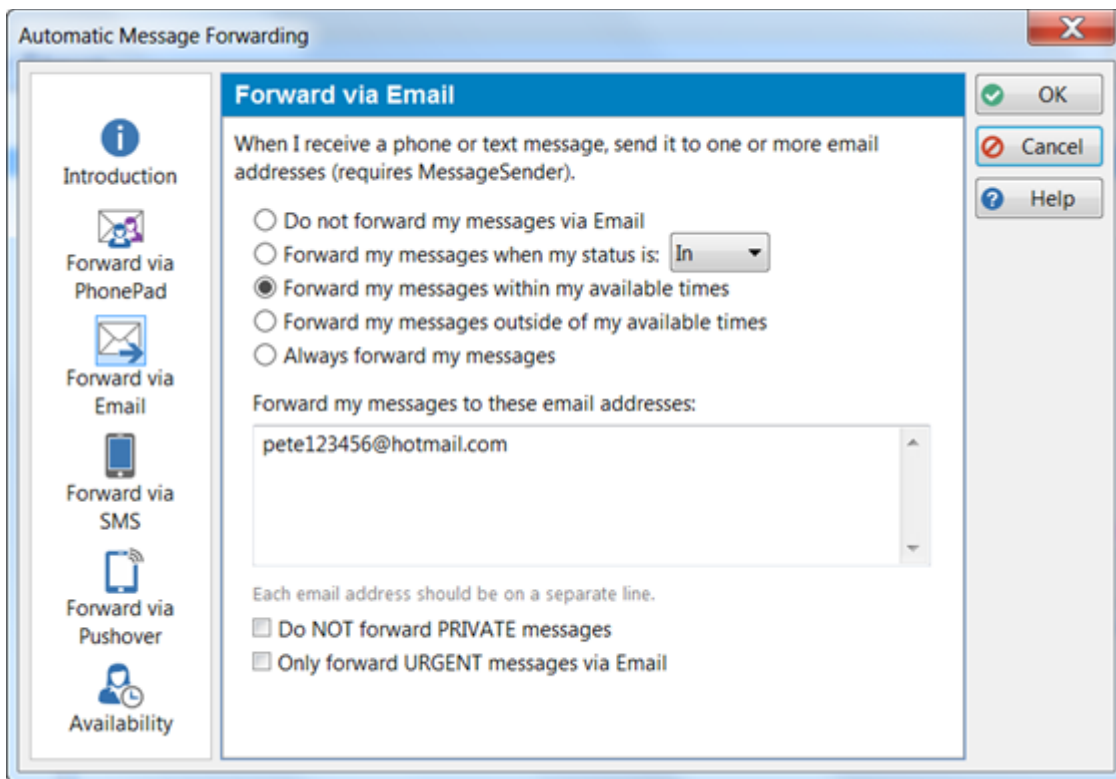
Do not forward my messages via PhonePad	No messages will be forwarded to other users.
Forward my messages when my status is x	Select this option to forward your messages when your WhereRU status matches the selected value from the drop-down list.
Forward my messages within my available times	When selected, messages will be forwarded based on your availability.
Forward my messages outside of my available times	When selected, messages will be forwarded based on your availability
Always forward my messages	Your messages will always be forwarded to the specified users.
Forward my messages to these users	Enter the names of the users you want messages to be forwarded to by selecting their names from the drop-down list and clicking the Add button.

	Users can be removed by selecting their name in the list and clicking the Delete button.
Do NOT forward PRIVATE messages	When checked, only non-Private messages will be forwarded.
Only forward URGENT messages	When checked, only Urgent messages will be forwarded.

This feature does **not** require MessageSender.

Forward Via Email

When you're not in the office, or maybe even when you are, you can have your PhonePad 5 messages forwarded to one or more email addresses.

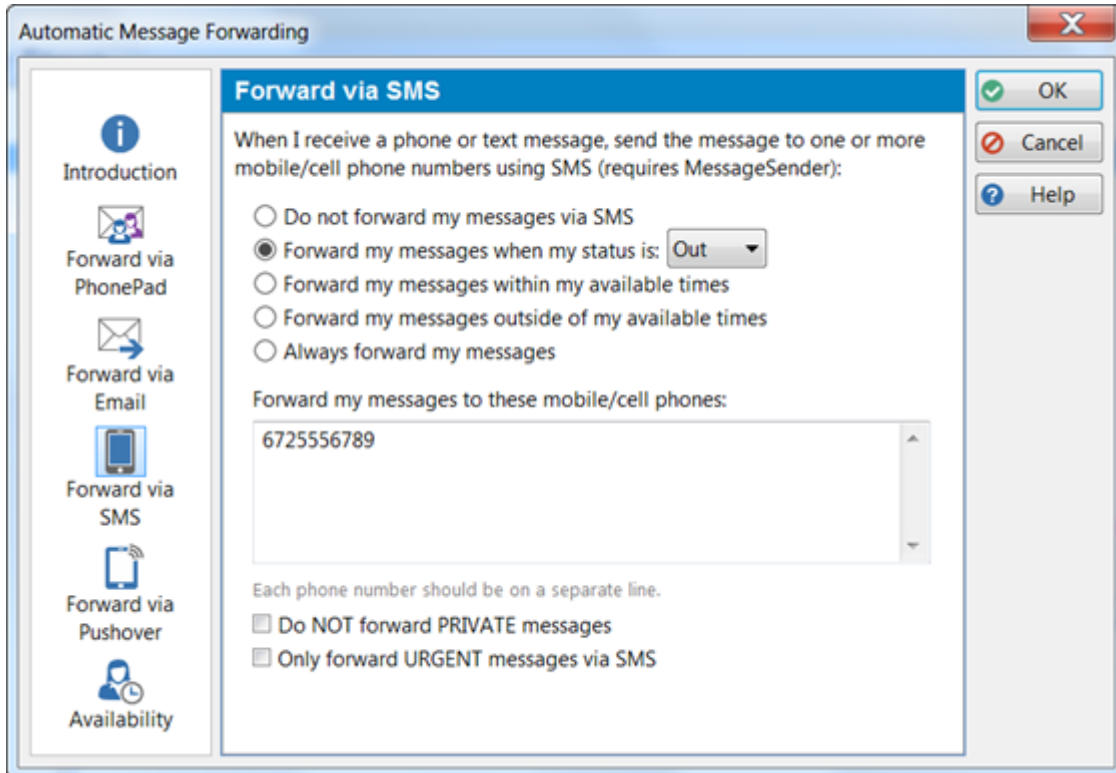


Do not forward my messages via Email	No messages will be forwarded to other users.
Forward my messages when my status is x	Select this option to forward your messages when your WhereRU status matches the selected value from the drop-down list.
Forward my messages within my available times	When selected, messages will be forwarded based on your availability.
Forward my messages outside of my available times	When selected, messages will be forwarded based on your availability
Always forward my messages	Your messages will always be forwarded to the specified users.
Forward my messages to these email addresses	Enter the email addresses you want to forward your messages to. Each email address should be on a separate line.
Do NOT forward PRIVATE messages	When checked, only non-Private messages will be forwarded.
Only forward URGENT messages	When checked, only Urgent messages will be forwarded.

This feature **does** require MessageSender to be installed on your Server or Host PC by your PhonePad administrator.

Forward Via SMS

You can have your messages sent to your cell/mobile phone via SMS (Short Messaging Service). Whether you're a lawyer in court, a business person in a meeting, a tradesman on the road, or a doctor doing your rounds, it's a great way to receive your phone messages when you're not in the office.



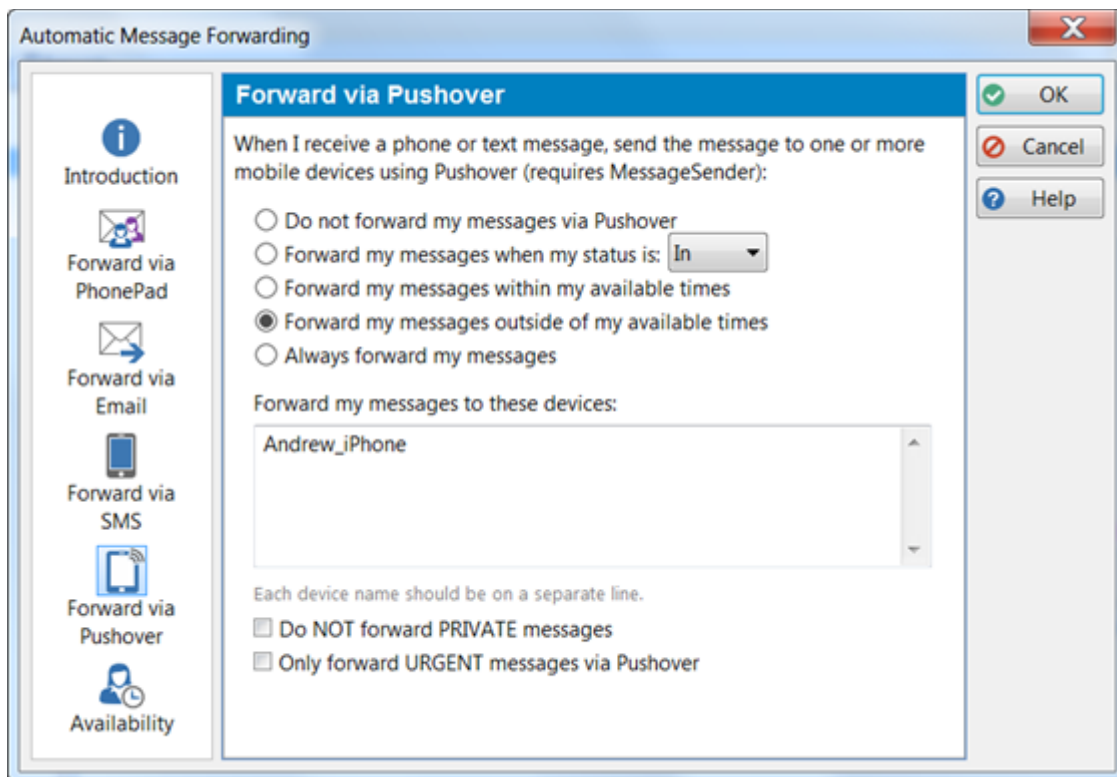
Do not forward my messages via SMS	No messages will be forwarded to other users.
Forward my messages when my status is x	Select this option to forward your messages when your WhereRU status matches the selected value from the drop-down list.
Forward my messages within my available times	When selected, messages will be forwarded based on your availability.
Forward my messages outside of my available times	When selected, messages will be forwarded based on your availability.
Always forward my messages	Your messages will always be forwarded to the specified users.
Forward my messages to these	Enter the email addresses you want to forward your messages to. Each cell/mobile number should be on a separate line.

cell/mobile numbers	
Do NOT forward PRIVATE messages	When checked, only non-Private messages will be forwarded.
Only forward URGENT messages	When checked, only Urgent messages will be forwarded.

This feature **does** require MessageSender to be installed on your Server or Host PC by your PhonePad administrator.

Forward Via Pushover

Have your phone messages forwarded directly to an app on your mobile device without using an SMS network.

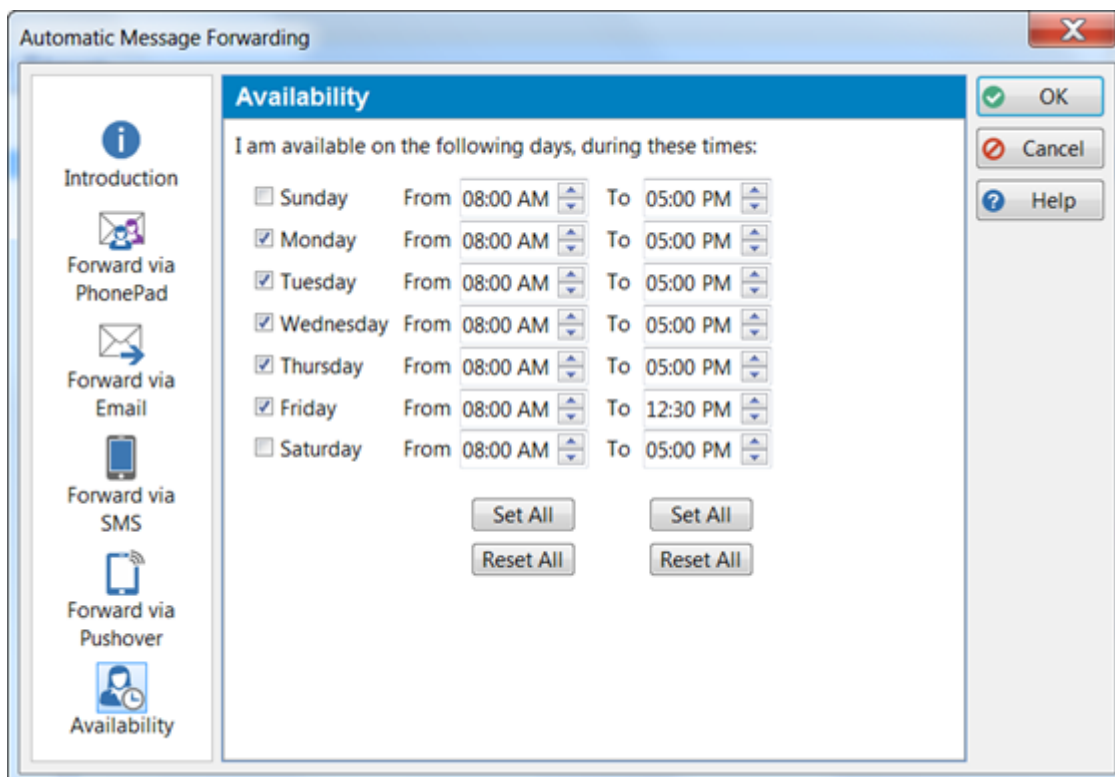


Do not forward my messages via Pushover	No messages will be forwarded to other users.
Forward my messages when my status is x	Select this option to forward your messages when your WhereRU status matches the selected value from the drop-down list.
Forward my messages within my available times	When selected, messages will be forwarded based on your availability.
Forward my messages outside of my available times	When selected, messages will be forwarded based on your availability
Always forward my messages	Your messages will always be forwarded to the specified users.
Forward my messages to these devices	Enter the email addresses you want to forward your messages to. Each device should be on a separate line.
Do NOT forward PRIVATE messages	When checked, only non-Private messages will be forwarded.
Only forward URGENT messages	When checked, only Urgent messages will be forwarded.

This feature **does** require MessageSender to be installed on your Server or Host PC by your PhonePad administrator.

Availability Settings

The **Availability** tab allows you to specify what days and times you are (and aren't) available by selecting the check boxes for the relevant days and setting the start and end times. The settings affect all of the previous options.



When the check box for a day of the week is checked, the times for that day are used by *Automatic Message Forwarding* based on the settings you make with **Forward via PhonePad**, **Forward via Email**, **Forward via SMS** and **Forward via Pushover**.

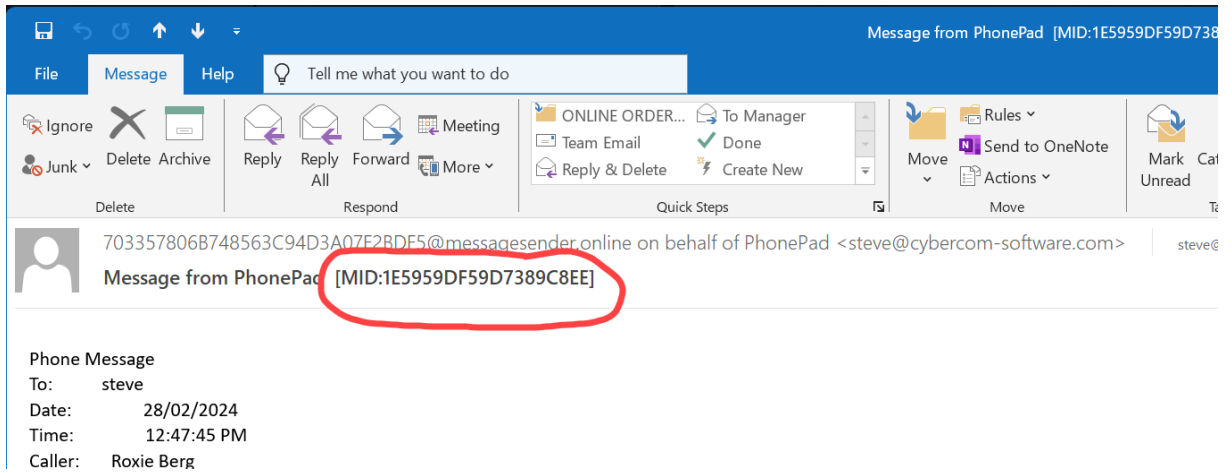
Important Information About Automatically Forwarded Emails

When an email is sent by MessageSender, it will add a special code to the Subject that's called an MID (Message Identifier).

MIDs are unique codes that are used by MessageSender to track emails. They are not only unique in your system, but also unique amongst every PhonePad site in the world.

It is **essential** that, when replying to received emails, that the user doesn't alter or remove this code. They can alter the rest of the Subject line but **not** the MID code. Otherwise, email replies, Read Receipts and Message Delivery Failures won't get sent back to PhonePad.

Here's an example of what we're talking about.



The screenshot shows the Outlook interface for an email. The ribbon at the top includes 'File', 'Message', and 'Help'. The 'Message' ribbon has various actions like 'Ignore', 'Delete', 'Archive', 'Reply', 'Reply All', 'Forward', and 'More'. The 'Message' header area shows the sender's name and email address, with the message ID '1E5959DF59D7389C8EE' circled in red. Below the header, the message content is displayed as a 'Phone Message' with the following details:

Phone Message
To: steve
Date: 28/02/2024
Time: 12:47:45 PM
Caller: Roxie Berg

Chapter

12

Address Book

Address Book

PhonePad has its own built-in Address Book for storing all of your contacts. Any caller information you enter when sending a message will be automatically added to the Address Book if the information doesn't already exist. You can add entries to the Address Book manually or import them from file.

To access the Address Book, click on the **Address Book** button on the **Home** tab of the toolbar, or select **Address Book** from the **Tools** menu.



The Address Book main window will be displayed.

Fullname	Firstname	Lastname	Company	Business Phone	Bus
Mathew Abbott	Mathew	Abbott	Lester Enterprises	9881838	
Ashlee Abbott	Ashlee	Abbott	Avery Co	8018747	
Kaye Abbott	Kaye	Abbott	Bullock Enterprises	5860522	
Tammi Acevedo	Tammi	Acevedo	Castillo Inc	6043750	
Arnold Acevedo	Arnold	Acevedo	Wilkinson Pty Ltd	9054361	
Freddie Acevedo	Freddie	Acevedo	Espinoza Enterprises	6998896	
Inez Acevedo	Inez	Acevedo	Hendricks and Associates	6277135	
Mallory Acosta	Mallory	Acosta	Riddle and Associates	9670982	
Natalie Acosta	Natalie	Acosta	Montoya Limited	9546962	
Miguel Acosta	Miguel	Acosta	Dudley Corporation	5910452	
Angela Acosta	Angela	Acosta	Stevenson Corporation	9866973	
Misty Adams	Misty	Adams	Mclaughlin LLC	6337445	
Sherri Adams	Sherri	Adams	Summers Inc	6859756	
Marcella Adams	Marcella	Adams	Berry Company	9143066	
Pansy Adams	Pansy	Adams	Ashley Enterprises	9492276	
Cheri Adams	Cheri	Adams	Reeves Co	6182083	
Concetta Adams	Concetta	Adams	Welch Corp	8017658	802
Lawrence Adams	Lawrence	Adams	Barron Limited	7423405	
Sally Adkins	Sally	Adkins	Petersen Corporation	6338454	
Tommie Adkins	Tommie	Adkins	Page Inc	7760860	

Search for: in this column: Fullname

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Status: Found 164 entries under Lastname starting with A.

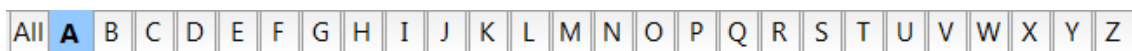
- | | |
|---|---|
| 1 | The Address Book list is where all of your contacts will appear. You can click a column heading to sort by that column. |
| 2 | Click to <i>Add</i> a new entry. |
| 3 | Click to <i>Edit</i> the selected entry. You can also double-click on the entry. |

4	Click to <i>Delete</i> the selected entry.
5	Click to <i>View</i> the selected entry.
6	Click to <i>Print</i> all Address Book entries.
7	Click to <i>Import</i> Address Book entries.
8	Click to <i>Export</i> all Address Book entries.
9	Click to delete all Address Book entries. WARNING: This complete delete all Address Book entries and cannot be undone.
10	Click to select the columns you want displayed in the Address Book list.
11	Click to view a complete history of all phone messages and follow up notes for the selected contact.
12	Click to open the Address Book settings page in Preferences.
13	Click to close the Address Book.
14	Click to display online help.
15	You can search all Address Book entries using the search facility. Enter search text under the Search for field.
16	This is the Search button.
17	This button clears the search.
18	Select the column you want to search, then click the Search button.
19	You can use the letter tabs to view entries that begin with the selected tab.

Some buttons may be disabled, depending on what Address Book access your PhonePad administrator has given you.

Address Tabs

At the bottom of the Address Book window there is an address tab, similar to what you get with paper address books.



Click a tab from **A** to **Z** to view contact names starting with that letter (either the firstname or lastname, depending on your Address Book settings under **View/Preferences/Address Book**).

Click the **All** tab to view all entries in your Address Book. If you have a lot of entries this may take a few seconds.

Add an Address Book Entry

To add a new Address book entry (or Caller), click the **Add** button.

The top part of the screen contains the **Caller** Information area. The **Fullname** field is a mandatory field as it is used by PhonePad to look up caller information.

The rest of the screen contains a number of tabbed pages:

- General
- Business
- Postal
- Home
- Map
- Family
- Notes
- Documents

Your PhonePad Administrator can configure which tabs are displayed on this screen, so not all of the tabs described here may appear.

Caller Information

Fullname	This field is mandatory. When you enter a name in the Fullname field it will be automatically separated into the Firstname, Middlename and Lastname fields. Of course, you can always edit this fields if you wish.
Job Title	You can enter a job title or position in this field.
Company	Enter a company name if relevant (you can rename this to something else if it makes more sense for your business).

Update Entry
✕

Caller Information

Fullname:

Company:

OK

Cancel

Print

Help

General
 Business
 Postal
 Home
 Map
 Family

⏪ ⏩ ⏴ ⏵

Title:

Firstname:

Middlename:

Lastname:

Suffix:

Job Title:

Date of Birth: Age Now:

Date of Death:

Identification:

Contact Type:

Best Contact Number:

Load...

Save...

Clear...

Private Address Book Entry

Added by:

Date: 30/12/2022 7:58:09 AM

Updated by:

Date: 30/12/2022 7:58:09 AM

General Tab

Title	Select or enter a title, eg. Ms.
Firstname	This field is automatically populated when you enter a name in the Fullname field, but you can also manually enter a Firstname.
Middlename	This field is automatically populated when you enter a name in the Fullname field, but you can also manually enter a Middlename.
Lastname	This field is automatically populated when you enter a name in the Fullname field, but you can also manually enter a Lastname.
Suffix	Anything that comes after the name, like Esq.
Job Title	Their position title, eg. CEO.
Date of Birth	When you select a birth date the Age Now will be automatically calculated.
Age Now	This field is automatically populated with the caller's age, based on the Date of Birth.

Date of Death	It's a bit morbid but your business may need this.
Identification	You can enter text in this field that identifies the entry. For example, you could enter a client number, patient number, etc.
Contact Type	Select a Contact Type from the drop-down list. These are added by your PhonePad administrator.
Best Contact Number	Contacts can have a lot of phone numbers in the Address Book, so this field can contain the best number to contact them on.
Load Save Clear	Use the Load button to load a photo for the contact. Use the Save button to save the photo. Use the Clear button to clear the photo.
Private Entry	When checked, only you will be able to view this entry.

Business Tab

These fields on the **Business** tab should be self-explanatory.

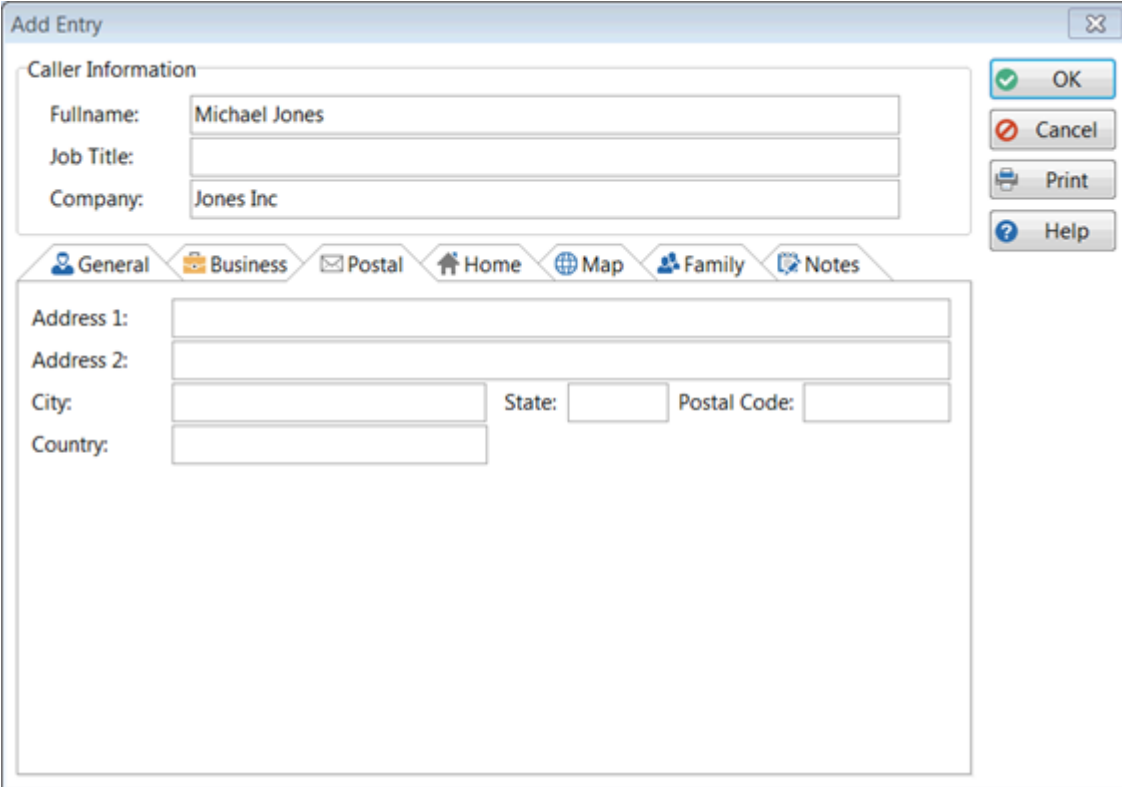
The screenshot shows the 'Add Entry' dialog box with the 'Business' tab selected. The form contains the following fields and values:

- Caller Information:**
 - Fullname: Michael Jones
 - Job Title: (empty)
 - Company: Jones Inc
- Address:**
 - Address 1: 123 First Avenue
 - Address 2: (empty)
- Location:**
 - City: New York
 - State: NY
 - Postal Code: 10003
 - Country: USA
- Phone Numbers:**
 - Telephone: 555 6666
 - Ext: (empty)
 - Alt. Phone: 555 7777
 - Fax: (empty)
 - Cell/Mobile: 555 8888
- Other Fields:**
 - Email: (empty)
 - Website: (empty)

Control buttons on the right include OK, Cancel, Print, and Help.

Postal Tab

These fields on the **Postal** should be self explanatory.



The screenshot shows a software window titled "Add Entry" with a close button in the top right corner. The window is divided into two main sections. The top section, titled "Caller Information", contains three text input fields: "Fullname:" with the value "Michael Jones", "Job Title:" which is empty, and "Company:" with the value "Jones Inc". To the right of this section are four buttons: "OK" (with a green checkmark icon), "Cancel" (with a red 'X' icon), "Print" (with a printer icon), and "Help" (with a question mark icon). Below the "Caller Information" section is a horizontal tab bar with six tabs: "General" (with a person icon), "Business" (with a briefcase icon), "Postal" (with an envelope icon), "Home" (with a house icon), "Map" (with a globe icon), "Family" (with a group of people icon), and "Notes" (with a notepad icon). The "Postal" tab is currently selected. Below the tab bar is a large text area containing several input fields: "Address 1:" (empty), "Address 2:" (empty), "City:" (empty), "State:" (empty), "Postal Code:" (empty), and "Country:" (empty).

Home Tab

The fields on the **Home** should be self explanatory.

Map Tab

The **Map** tab can show the caller's location using Google Maps based on their **Business**, **Postal** or **Home** address. You will need to enter an address on the **Business**, **Postal** and/or **Home** tabs before you can use the **Map** feature.

To load the map, select **Business Address**, **Postal Address** or **Home Address** and click the **Update** button. It may take up to a minute or so, depending on the speed of your Internet connection.

A marker will show the address. You can zoom and pan the map, just as you can on the Google Maps website.

When you save the new address book entry the map will be saved in the database as a *static image*. This avoids having to load the map each time from Google Maps.

If you want to update the map you can do this at any time by clicking the **Update** button.

Family Tab

The **Family** tab allows you to enter a spouse's name and date of birth, as well as the names and dates of births for up to 6 children. It includes email address and phone numbers for their Spouse.

Update Entry
✕

Caller Information

Fullname:

Company:

✔ OK

✖ Cancel

🖨️ Print

? Help

👤 General
🏢 Business
✉️ Postal
🏠 Home
🌐 Map
👨‍👩‍👧 Family

Spouse

	Date of Birth	Age Now
Fullname: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>
Firstname: <input type="text"/>	Work Phone: <input type="text"/>	
Middlename: <input type="text"/>	Mobile/Cell: <input type="text"/>	
Lastname: <input type="text"/>		
Email: <input type="text"/>		

Children

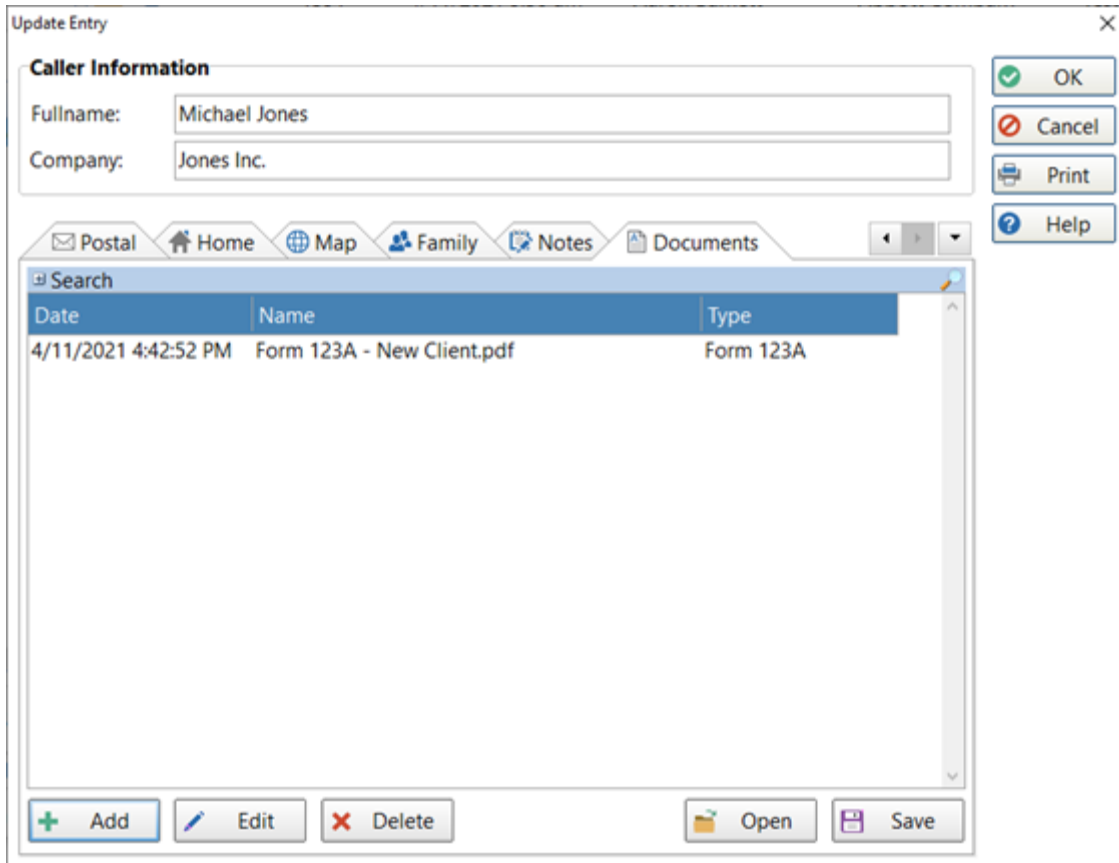
	Date of Birth	Age Now
Child 1: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>
Child 2: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>
Child 3: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>
Child 4: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>
Child 5: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>
Child 6: <input type="text"/>	<input type="text" value="v"/>	<input type="text" value=""/>

Notes Tab

The **Notes** tab is divided into 10 tabs which allow you to keep an almost unlimited amount of notes. The names and colors of the tabs can be customized in System Rules.

Documents Tab

On the **Documents** tab you can store documents for the Address Book entry.



Update Entry

Caller Information

Fullname: Michael Jones

Company: Jones Inc.

OK Cancel Print Help

Postal Home Map Family Notes Documents

Search

Date	Name	Type
4/11/2021 4:42:52 PM	Form 123A - New Client.pdf	Form 123A

+ Add Edit Delete Open Save

Please refer to Documents for more details.

Buttons

Click the **OK** button to add the new entry to the Address Book.

Click the **Cancel** button to cancel the addition.

Click the **Print** button to print the entry. Here is an example of a print out:

Caller Details

Firstname: Michael Lastname: Jones
Company: Jones Inc.

Business Address

Address 1: 123 First Avenue
Address 2:
City: New York State: NY Postal Code: 10003
Country: USA Phone: 555 8888 Cell/Mobile: 555 8888

Postal Address

Address 1:
Address 2:
City: State: Postal Code:
Country:

Home Address

Address 1:
Address 2:
City: State: Postal Code:
Country: Phone: Cell/Mobile:



Edit an Address Book Entry

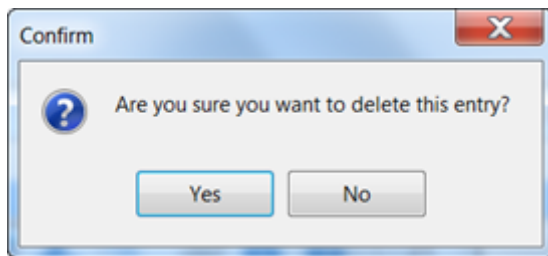
To edit an Address Book entry (or Caller), select the entry and click the **Edit** button, or double-click on the entry.

The information for adding an Address Book entry also applies to editing (or updating) an Address Book entry.

Delete an Address Book Entry

To delete an entry, select the entry and click the **Delete** button.

You will be asked to confirm the deletion.



View an Address Book Entry

To view an Address Book entry, select the entry from the list and click the **View** button. You will not be able to edit the entry.

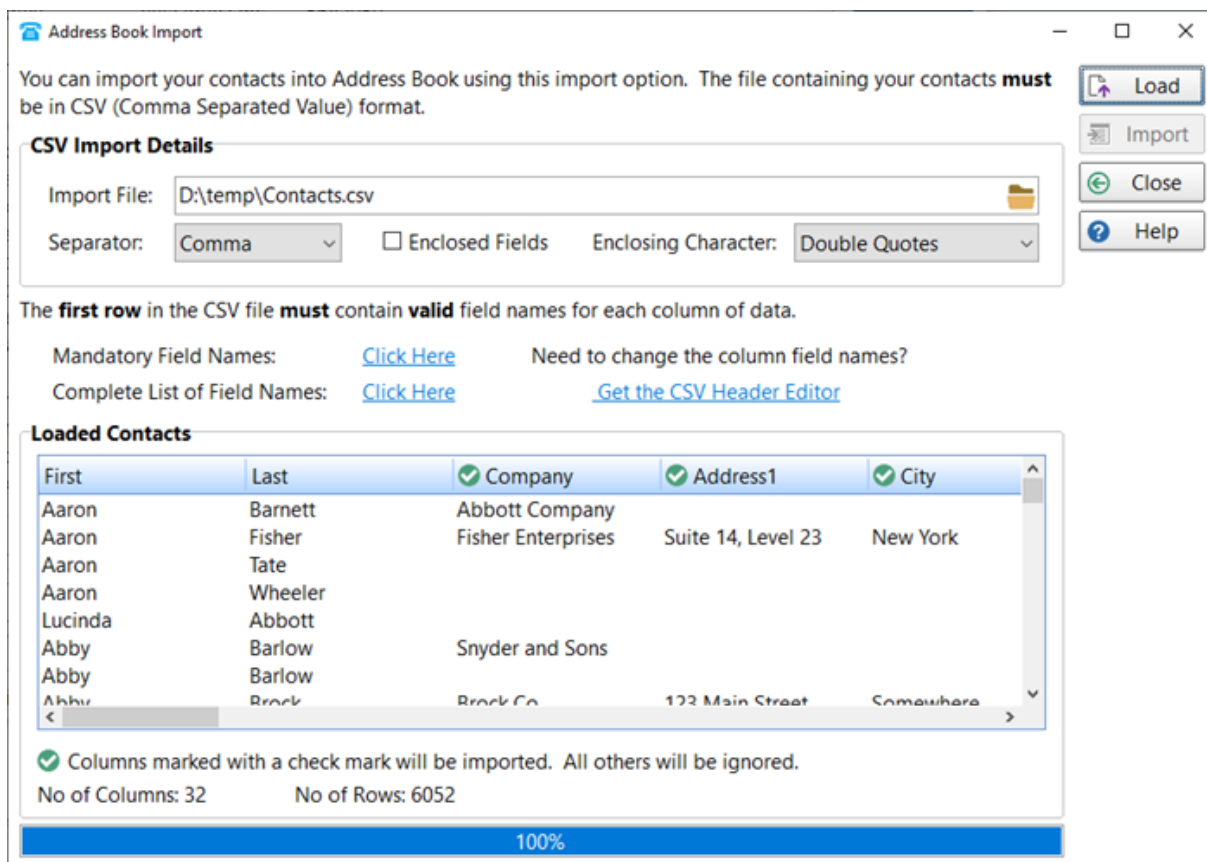
Print Address Book Entries

You can print an Address Book entry by editing or viewing the entry and clicking the **Print** button.

If you want to print the Address Book list, click **Print** on the Address Book main screen.

Importing Your Contacts

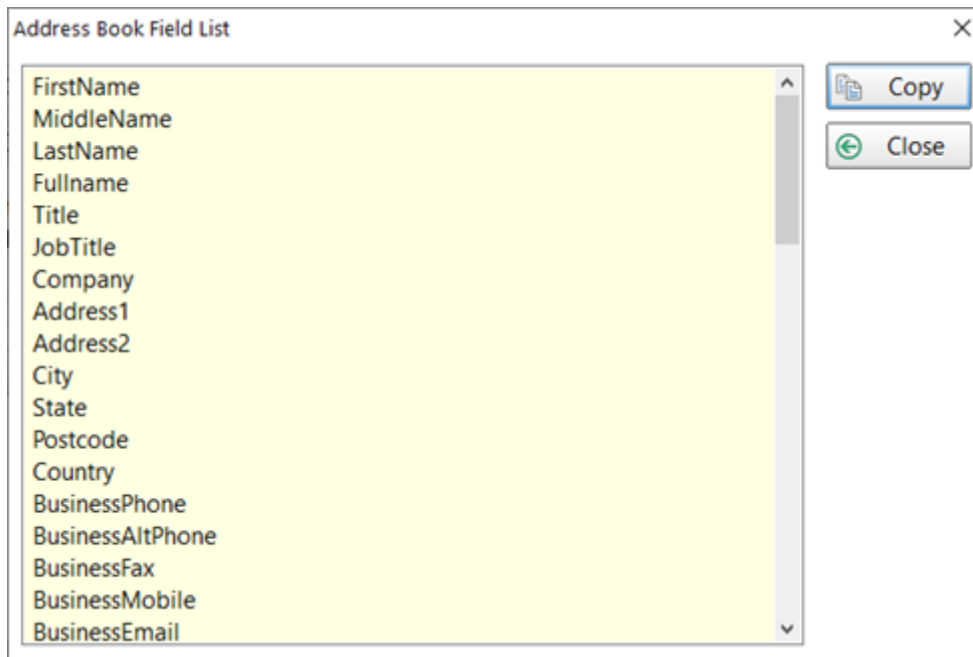
You can import contacts from a CSV file into the PhonePad Address Book. Click the **Import** button.



The first row of the file you are importing **must contain column names**. The column names can be in any order but some of the columns must match required Address Book fields.

There are links you can click to view the list of Mandatory field names, and a list of all Address Book field names. If your CSV file doesn't contain the required column names, there is a link for downloading the CSV Header Editor.

List of All Address Book Field Names



You can take a copy of the list by clicking the **Copy** button. If your CSV doesn't have the exact field names you will have to edit the names using a text file editor.

Importing From a CSV File

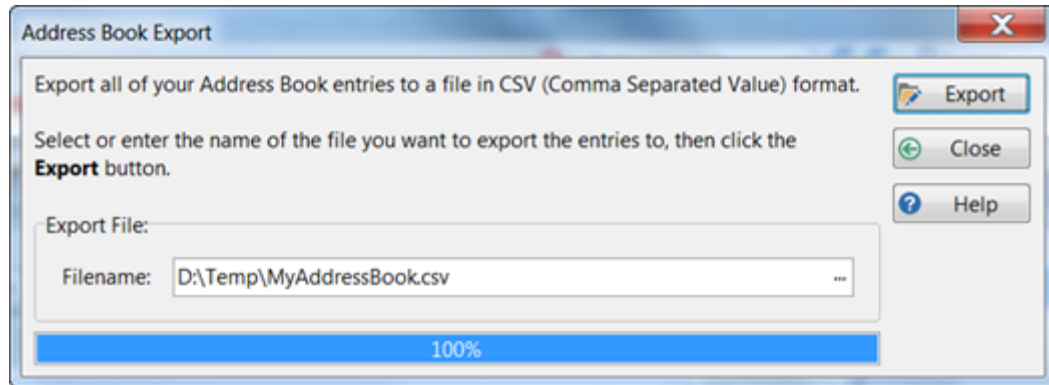
1. Select a file to import from.
2. The default settings will work with most CSV files. If necessary, select a **Separator** from the drop-down list, check the **Enclosed Fields** check box if needed, and select the **Enclosing Character**.
3. Click the **Load** button to load the contacts from the file.
4. Columns that correctly match the field names used by PhonePad will be marked with a green check mark icon. All other fields will be ignored and won't be imported.
5. Review the data to make sure it is correct, then click the **Import** button to import your contacts.



The **Import** button will be disabled unless all mandatory fields are present in the CSV file..

Exporting Your Contacts

If you need to export your Address Book, click the **Export** button.

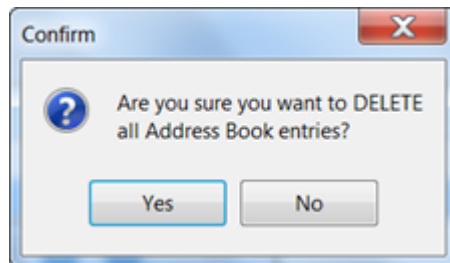


Enter a folder and filename to export to, then click the **Export** button.

Deleting All Entries

If you need to start over with your Address Book you can delete the entire Address Book by clicking the **Clear** button.

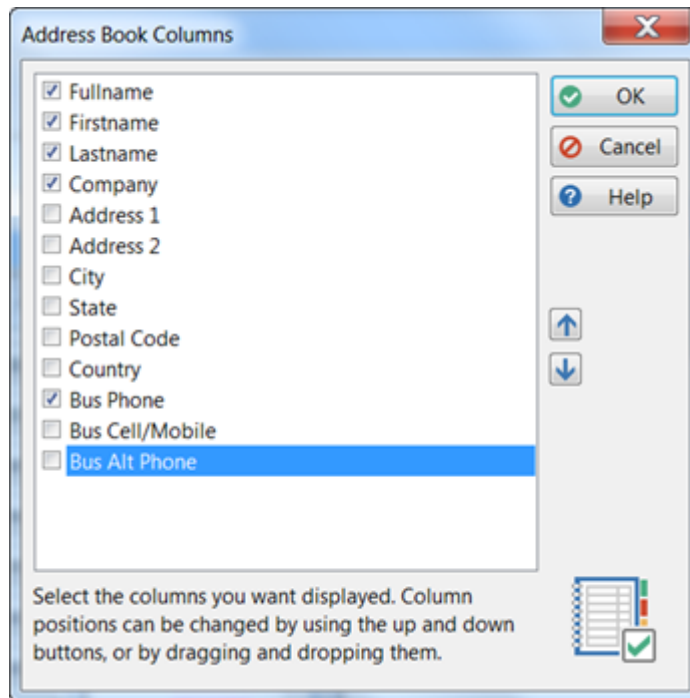
You will be asked to confirm this.



IMPORTANT: Once you have deleted all entries they cannot be recovered.

Setting the Columns

You can set some of the columns for display in the Address Book list. Click the **Columns** button.



To display a column, make sure its check box is checked.

You can change the order of the columns by using the up and down arrow buttons. Alternatively you can move columns by dragging and dropping them.

Address Book Settings

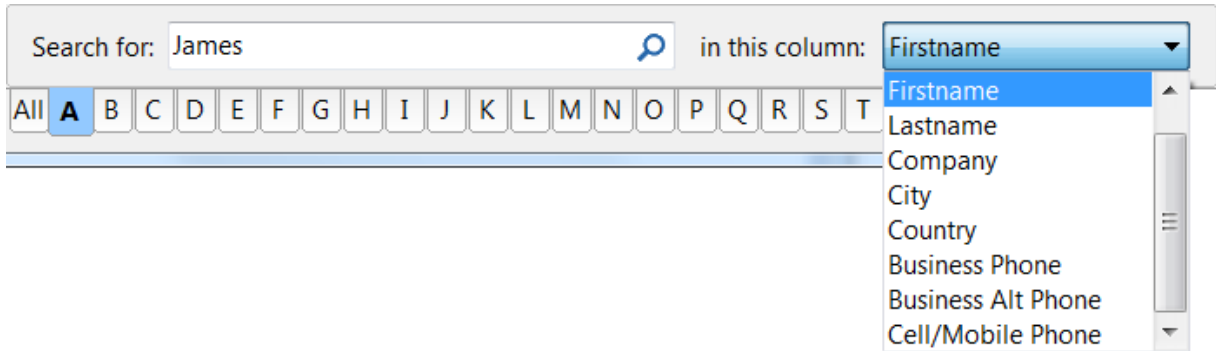
This is a shortcut to the *Address Book* settings page in *Preferences*.

Searching

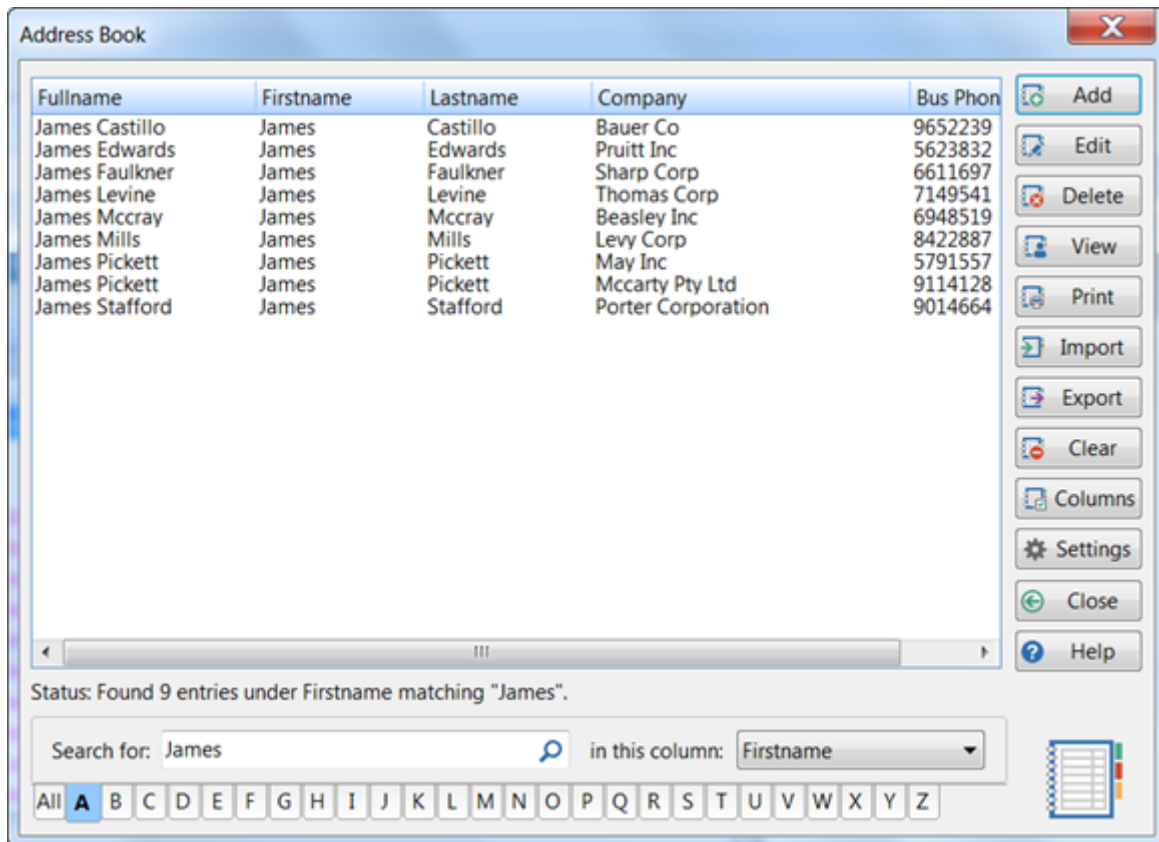
The *Address Book* has a built-in search function which is simple to use.

Search for:  in this column: ▼

1. Enter your search text under **Search for**.
2. Select a column to search from the drop-down list.



3. Click the **Search** button (the small button with the magnifying glass icon).
4. The results will be displayed in the Address Book list.



Documents

The PhonePad Address Book has a feature that enables you to stored an unlimited number of documents for each Caller (Address Book entry).

Update Entry

Caller Information

Fullname: Michael Jones

Company: Jones Inc.

Postal Home Map Family Notes Documents

Search

Date	Name	Type
4/11/2021 4:42:52 PM	Form 123A - New Client.pdf	Form 123A

OK Cancel Print Help

+ Add Edit Delete Open Save

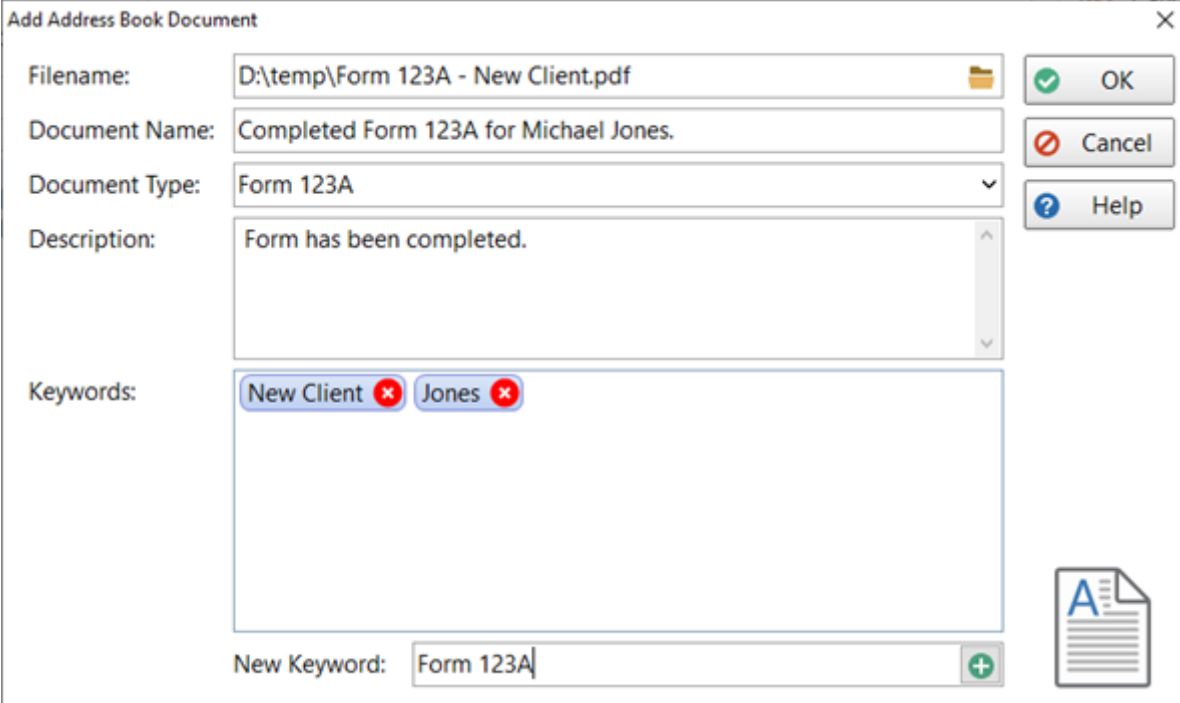
- Add** Add a new document.
- Edit** Edit the selected document.
- Delete** Delete the selected document.
- Open** Open the selected document.
- Save** Save the selected document as an external file.



Documents stored here are only for the selected Caller (Address Book entry). Each Caller has their own set of documents.

Adding a Document

To add a new document to the Address Book entry for the selected Caller, click the **Add** button.



The screenshot shows a dialog box titled "Add Address Book Document" with the following fields and controls:

- Filename:** D:\temp\Form 123A - New Client.pdf
- Document Name:** Completed Form 123A for Michael Jones.
- Document Type:** Form 123A
- Description:** Form has been completed.
- Keywords:** New Client, Jones
- New Keyword:** Form 123A

Buttons: OK, Cancel, Help

Filename Select or enter the location and name of the document.

Document Name Enter a name for the document. By default, the filename will be added but you can replace that text.

Document Type Select the Document Type from the list of types (these are set up under Lookup List Management). Optional.

Description Enter a description for the document. Optional.

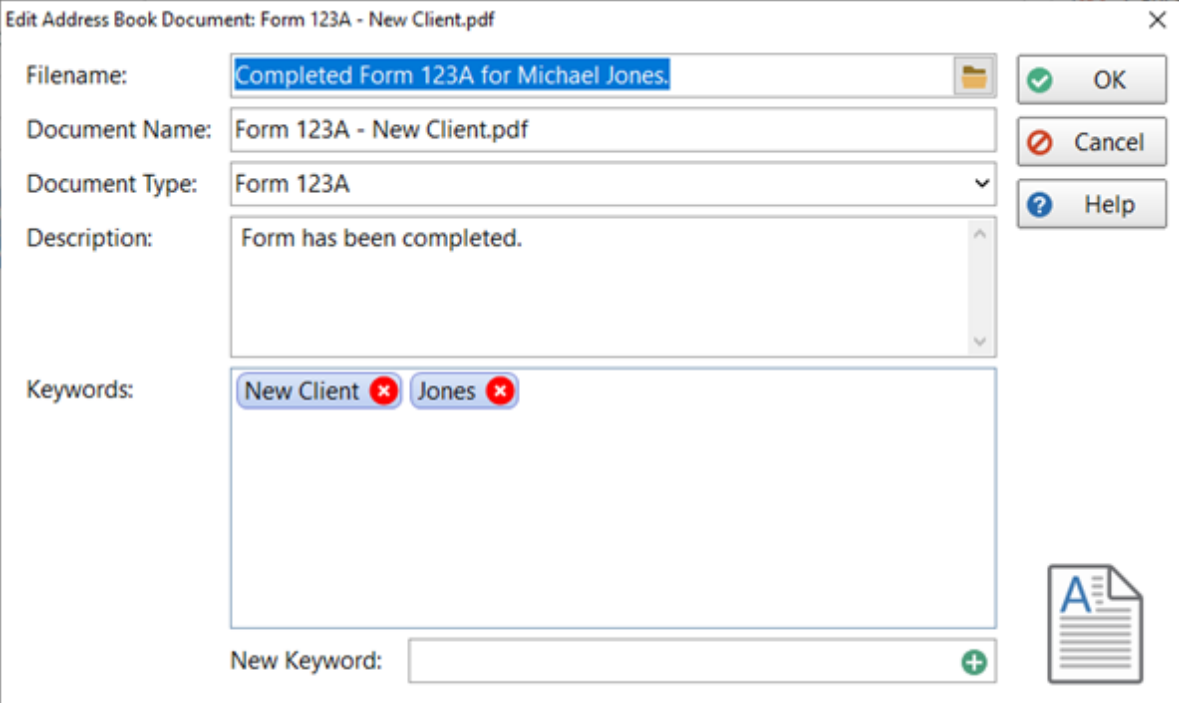
Keywords Enter keywords to make it easier to find the document.

To enter a keyword, type in the **New Keyword** field, then click the *Plus* button or press <enter>.

To remove a keyword, click on the red cross button on the keyword.

Editing a Document

To edit a document, select it and click the **Edit** button, or double-click on the document name.



The screenshot shows a dialog box titled "Edit Address Book Document: Form 123A - New Client.pdf". It contains the following fields and controls:

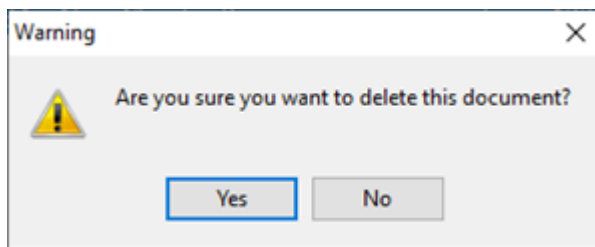
- Filename:** A text field containing "Completed Form 123A for Michael Jones." with a folder icon to its right.
- Document Name:** A text field containing "Form 123A - New Client.pdf".
- Document Type:** A dropdown menu currently set to "Form 123A".
- Description:** A text area containing "Form has been completed." with scroll arrows on the right.
- Keywords:** A list of tags including "New Client" and "Jones", each with a red 'x' icon to its right.
- New Keyword:** A text field with a green plus icon to its right.
- Buttons:** "OK" (green checkmark), "Cancel" (red circle with slash), and "Help" (blue question mark) buttons are located on the right side.
- Icon:** A document icon with a large letter 'A' is located in the bottom right corner.

Editing a document is pretty much the same as adding a document. You can change the document file, the **Document Name**, **Document Type**, **Description** and **Keywords**.

Deleting a Document

To delete a document, select the document and click the **Delete** button.

You will be asked to confirm the deletion.



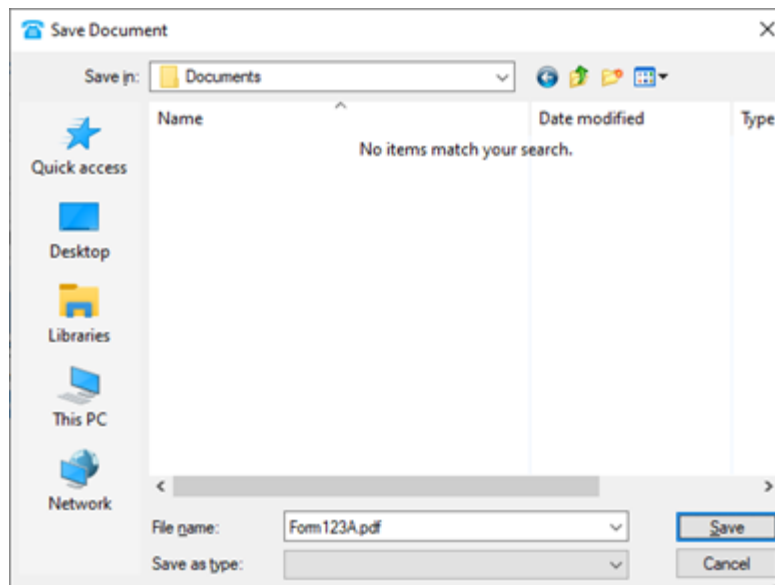
Opening a Document

You can open a document by selecting it from the list and clicking the **Open** button.

Saving a Document

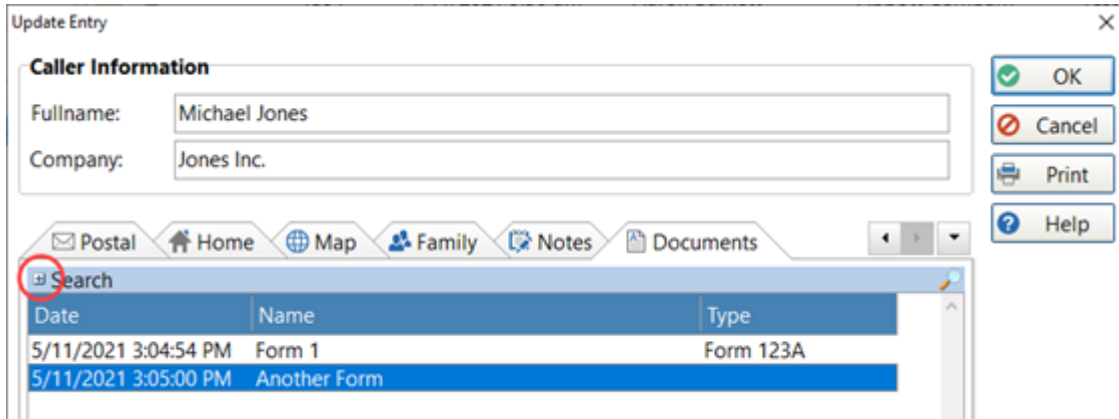
If you need an external copy of a document, select the document and click the **Save** button.

You will be prompted to select the location to save the file.

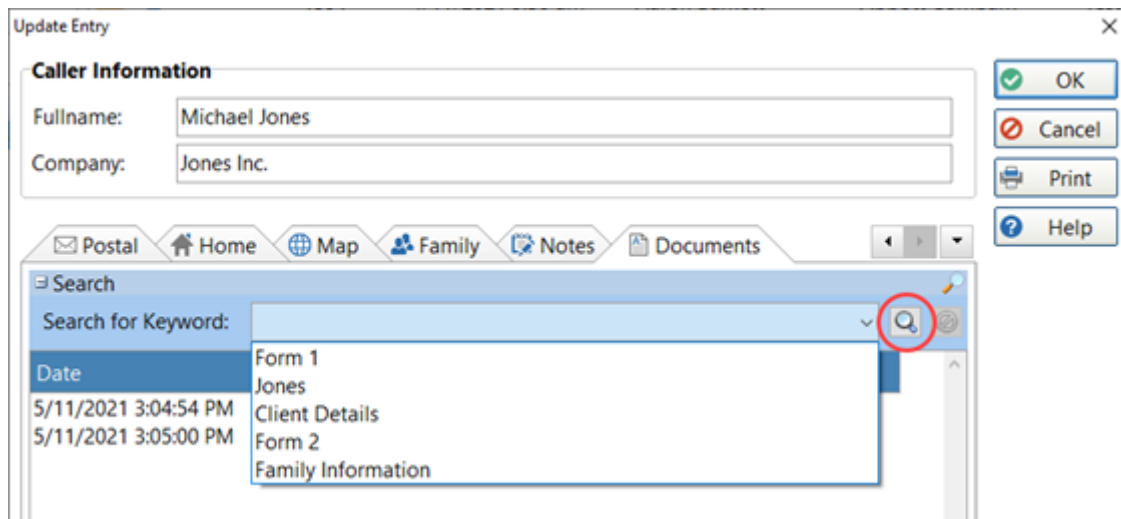


Searching for Documents

The **Document** tab in the **Address Book** provides an easy way to find documents for the selected Caller (Address Book entry).



1. If the Search panel is closed, click on the + button to open the panel.
2. Select a keyword from the **Keywords** list.
3. Click the **Search** button.



4. The document list will display all documents that have that keyword.

To clear the search results, click the **Cancel Search** button.

Update Entry

Caller Information

Fullname: Michael Jones

Company: Jones Inc.

Postal Home Map Family Notes Documents

Search

Search for Keyword: Client Details

Date	Name	Type
5/11/2021 3:04:54 PM	Form 1	Form 123A

OK Cancel Print Help

Close the Address Book

To close the Address Book click the **Close** button.

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Chapter

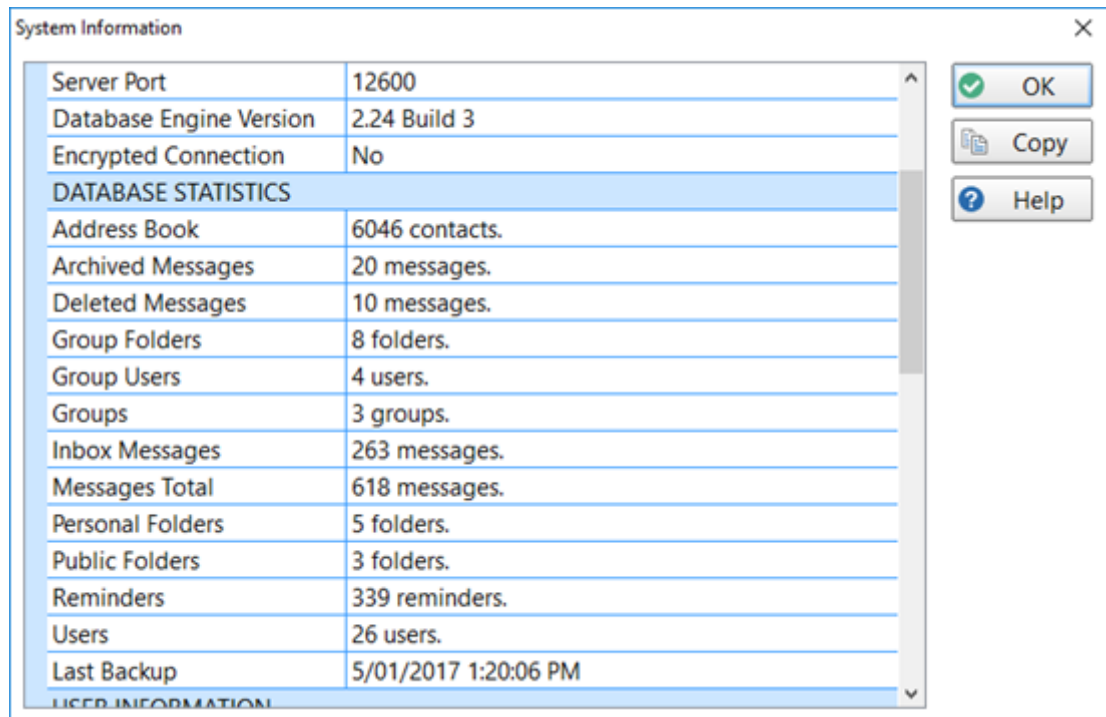
13

System Information

System Information

The System Information window displays information that can be useful for support staff trying to diagnose an issue.

Select **System Information** from the **Help** menu.



You can click the **Copy** button to copy these details to the Windows clipboard.

System Information displays:

- Application information
- Database information
- Database Statistics
- User Information
- License Details
- System information
- Anti-virus, anti-spyware and firewall software details

Chapter

14

Control Bar

Control Bar

The **Control Bar** is a toolbar that appears on your desktop and can be displayed anywhere on the screen. It will be displayed even when PhonePad is minimized.

The **Control Bar** gives you quick and easy access to common PhonePad 5 functions while leaving PhonePad minimized.



It features 12 buttons that allow you to access these features:

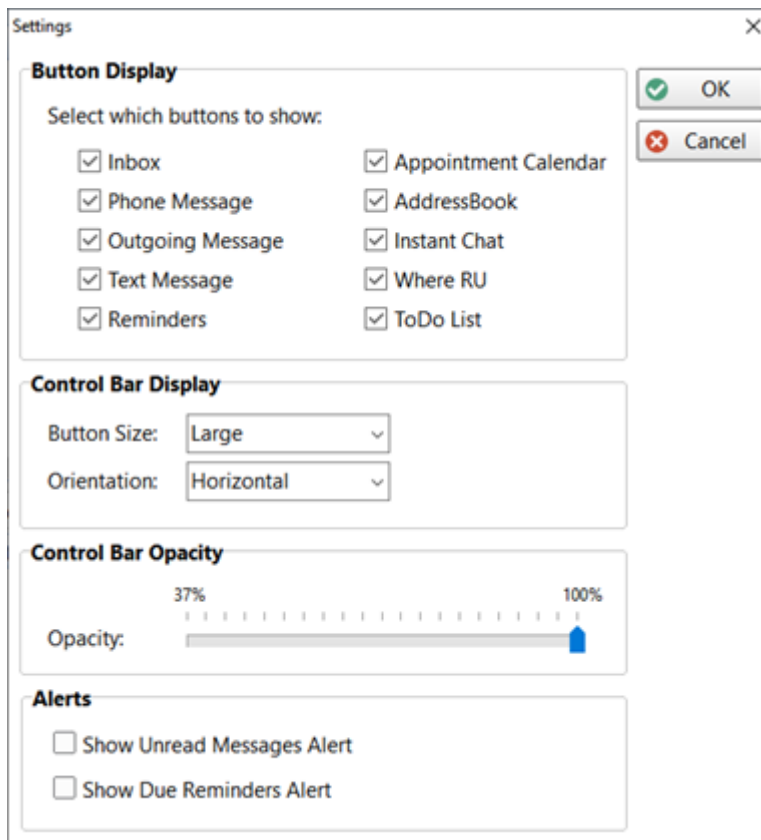
- | | |
|-----------------------------|--|
| Inbox | Opens PhonePad and displays your Inbox. It also shows the number of unread messages. |
| Phone Message | Opens a new phone message. |
| Outgoing Message | Opens a new outgoing message. |
| Text Message | Opens a new text message. |
| Reminders | Opens the Manage Reminders screen. It also shows the number of due reminders. |
| Appointment Calendar | Opens the Appointment Calendar. |
| Address Book | Opens the PhonePad Address Book. |
| Instant Chat | Opens Instant Chat. |
| To Do List | Opens the To Do List. |
| WhereRU | Opens the WhereRU application. |
| Settings | Opens the Settings window. |
| Exit | Closes ControlBar. |

When hovering the mouse over Control Bar buttons, the buttons will show a hint revealing the name of the button.



Control Bar Settings

Click the **Settings** button to open the **Settings** window. You can set **Control Bar** to only show the buttons you want to see.



Button Display	
Inbox	When checked, the Inbox button will be displayed on the Control Bar.

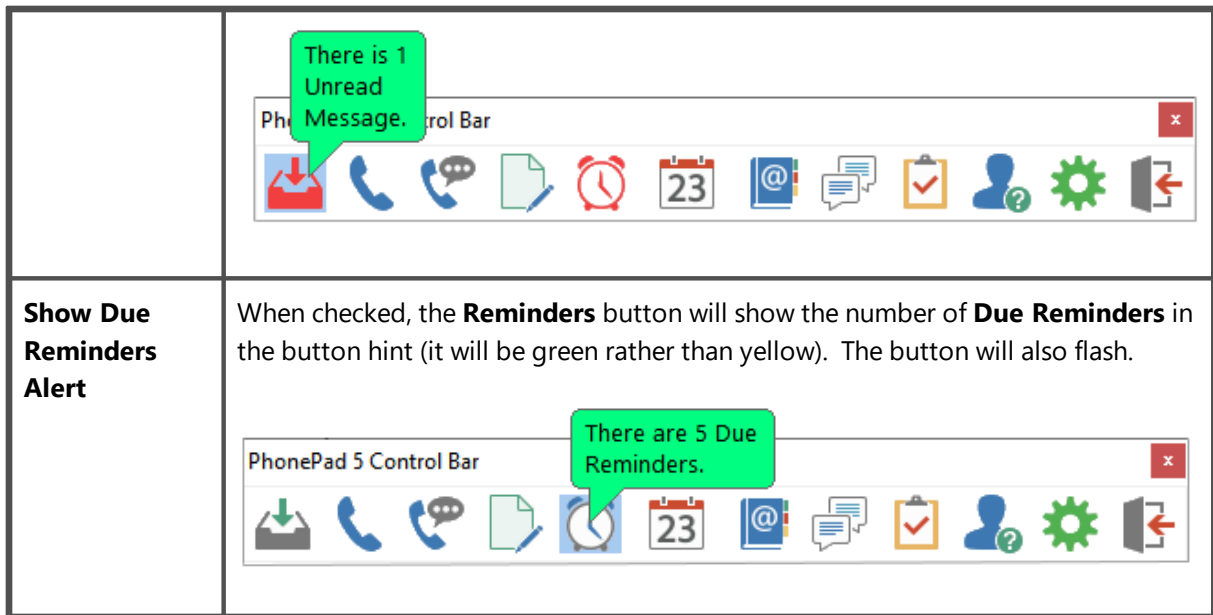
Phone Message	When checked, the Incoming Phone Message button will be displayed on the Control Bar.
Outgoing Message	When checked, the Outgoing Phone Message button will be displayed on the Control Bar.
Text Message	When checked, the Text Message button will be displayed on the Control Bar.
Reminders	When checked, the Reminders button will be displayed on the Control Bar.
Appointment Calendar	When checked, the Appointment Calendar button will be displayed on the Control Bar.
Address Book	When checked, the Address Book button will be displayed on the Control Bar.
Instant Chat	When checked, the Instant Chat button will be displayed on the Control Bar.
WhereRU	When checked, the WhereRU button will be displayed on the Control Bar.

Control Bar Display	
Button Size	You can choose the size of the Control Bar buttons: Small, Medium, Large or Larger .
Orientation	You can set the orientation to Horizontal or Vertical .

Control Bar Opacity	
Opacity	This control allows you to set the transparency of the Control Bar. When you change the Opacity you can see the change immediately. When you click the OK button, the change will be applied to the Control Bar.



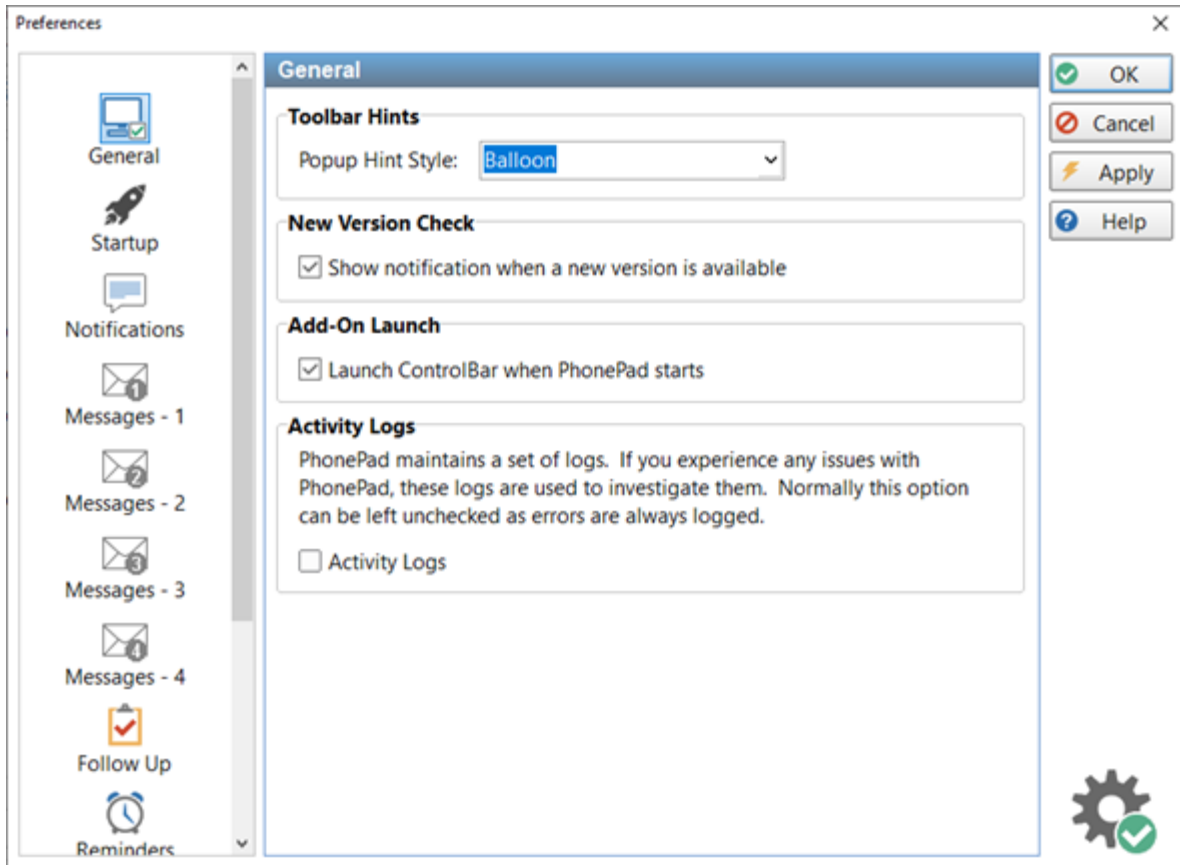
Alerts	
Show Unread Messages Alert	When checked, the Inbox button will show the number of Unread Messages in the button hint (it will be green rather than yellow). The button will also flash.



Launching ControlBar

To launch the Control Bar, select **Control Bar** from the **Tools** menu.

You can set the Control Bar to start automatically when PhonePad starts by checking the **Launch Control Bar when PhonePad starts** check box under **Settings/Preferences/General**.



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Chapter

15

Shortcuts

Shortcuts

To make it quicker and easier to access some features in PhonePad, a number of shortcuts are available.

Main Screen

New Phone Message	<shift> <insert>
New Outgoing Message	<ctrl> <insert>
New Text Message	<alt> <insert>
Delete Selected Message	<delete>
View Selected Message	<enter>
View Address Book	<F4>
Check Inbox	<F5>
Refresh Inbox	<shift> <F5>
Refresh User List	<F6>
Exit PhonePad	<ctrl> <alt> <x>

Phone Message Form

To	<F2>
Date	<F3>
Time	<F4>
Caller	<F5>
Phone	<F6>
Company	<F7>
Category	<F8>
Subject	<F9>
Reference	<F11>
Message	<F12>
Email	<shift> <F7>
Custom	<shift> <F8>
Date of Birth	<shift> <F9>

Chapter

16

Instant Chat

Instant Chat

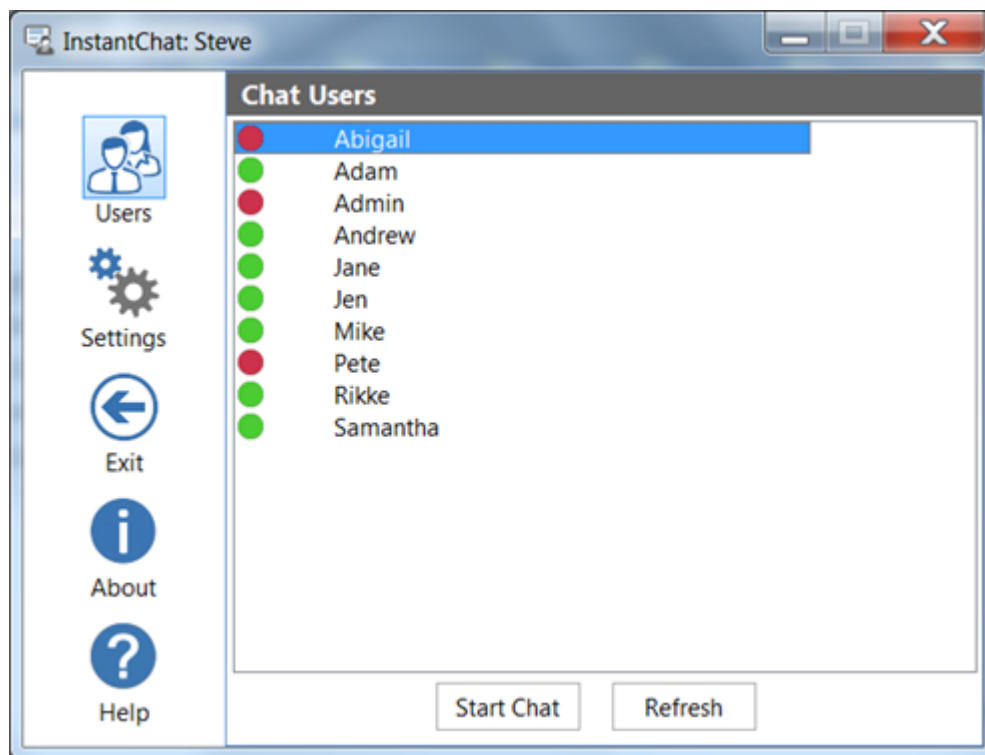
PhonePad 5 includes a simple, easy-to-use instant messaging application designed to operate within your network.

To open Instant Chat, click the **Instant Chat** button on the **Home** tab of the toolbar, or select **Instant Chat** from the **Tools** menu, or click the **Instant Chat** icon on the status bar.



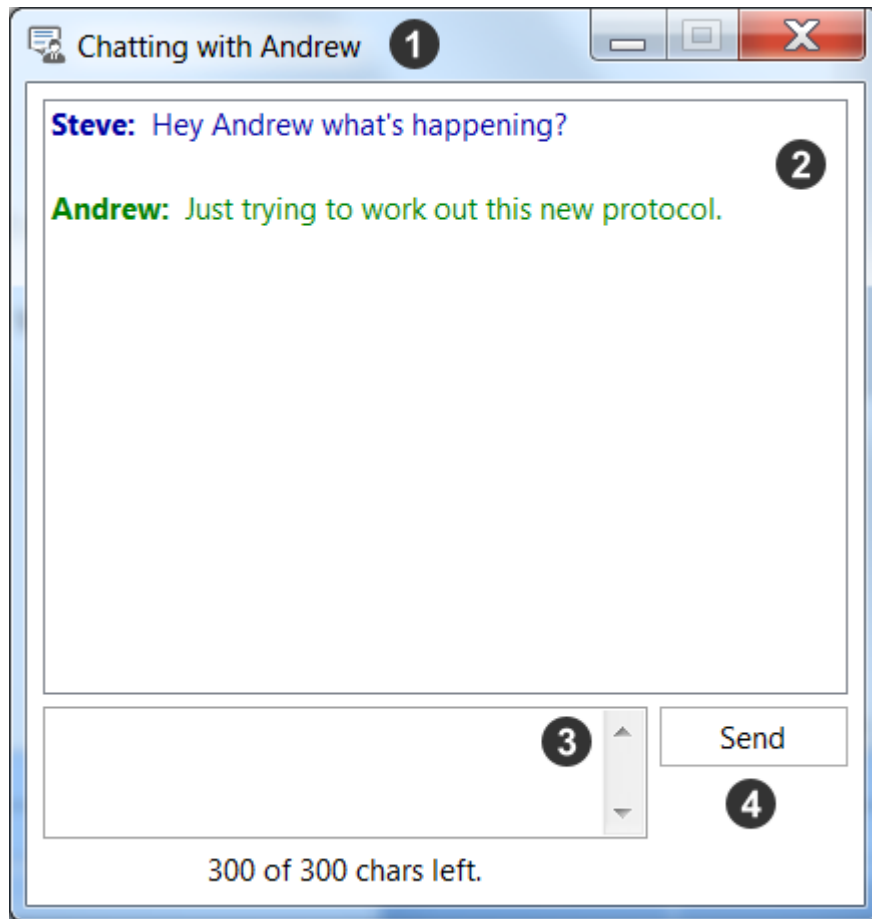
Starting a Chat

When Instant Chat starts you will be presented with the *Users* screen.



A **green** status indicator means the user has Instant Chat running and is available. A **red** status indicator means the user does not have Instant Chat running and is not available.

To start chatting with someone, select their name from the list and click **Start Chat**. The chat window will appear in the bottom right corner of your screen.

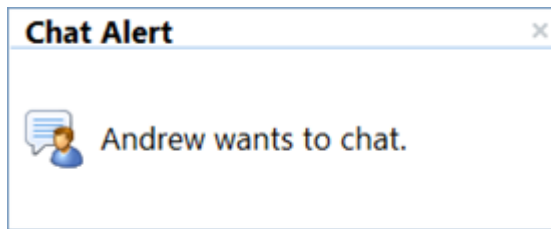


1	The title bar of the chat window shows who you are chatting with.
2	This is the conversation area where all of the chat text appears. The text you send will be blue and the text you receive will be green.
3	This is where you enter the text you want to send to the other person.
4	Click Send to send your text, or just press the <enter> key.

Although you can only chat to one person in the chat window, you can have multiple chat windows open at the same so you can chat with as many people as you like individually.

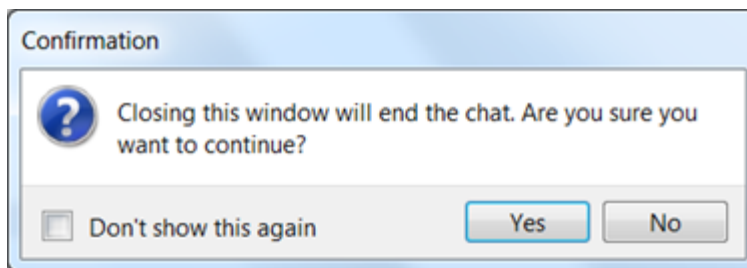
Receiving a New Chat

When someone else initiates a chat with you, a new chat window will open and a popup notification will be displayed.



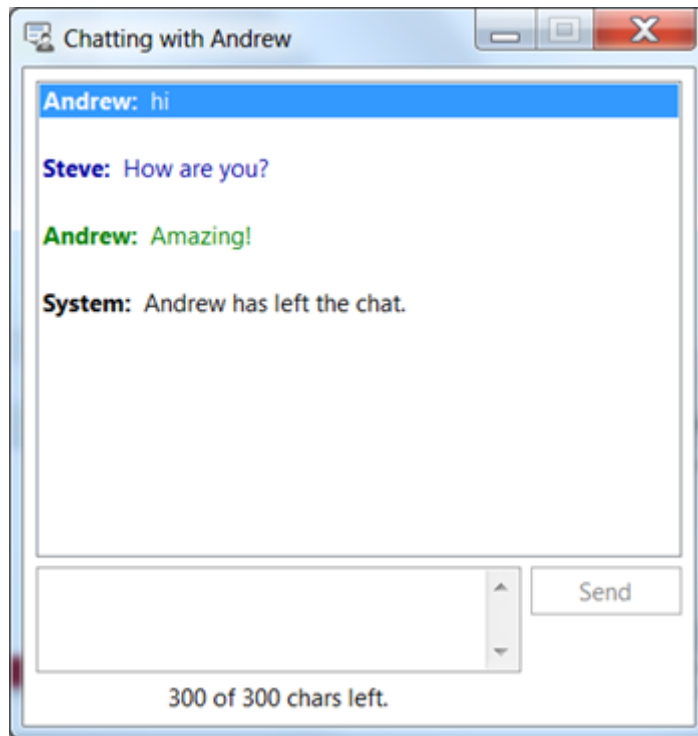
Ending a Chat

To finish a chat just close the chat window. You will be asked to confirm this (unless you have disabled this option).



Click **Yes** to close the chat or click **No** to continue the chat. If you don't want these confirmation messages again check the **Don't show this again** check box before clicking **Yes** or **No**.

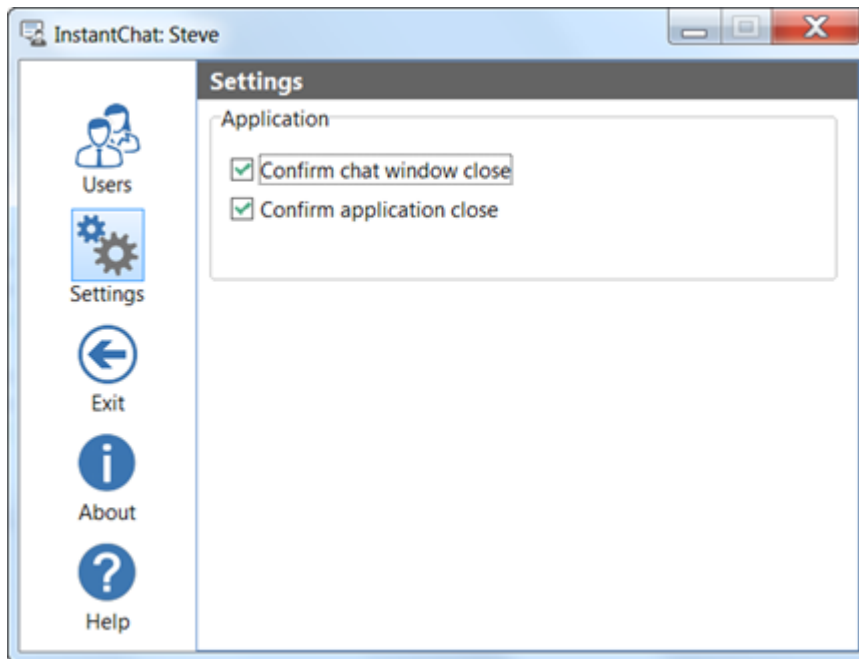
If the other person closes the chat window before you, you will receive a notification message from the system. System messages are always shown in black.



Once the other party has left the chat you will not be able to send any further text (so you don't end up talking to yourself).

Settings

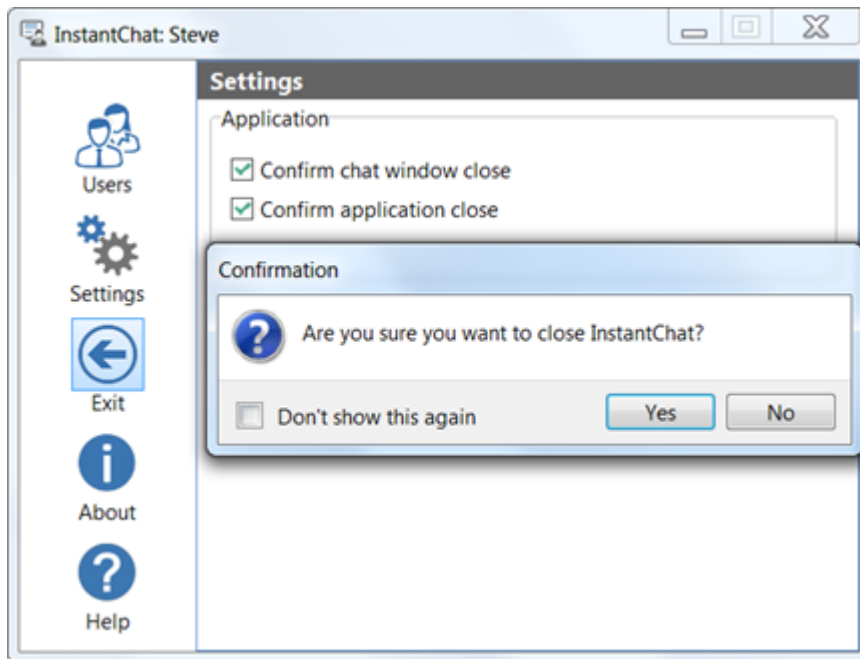
Select **Settings** from the side menu to access the Instant Chat settings.



Confirm chat window close	When checked, you will be asked to confirm closing a chat window.
Confirm application close	When checked, you will be asked to confirm closing Instant Chat.

Closing Instant Chat

To close Instant Chat (rather than minimizing it), click the Exit button. You will be asked to confirm this (unless you have disabled this option).



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Chapter

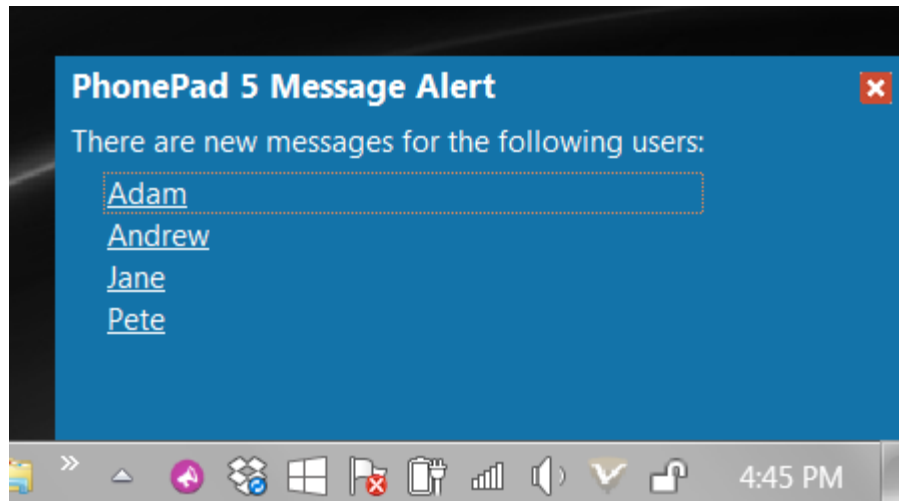
17

Message Alert

Message Alert

If you have access to multiple Inboxes then it can be awkward trying to monitor them all for new messages. That's where Message Alert comes in.

Message Alert will display a notification message above the system tray area each time one of the Inboxes you are monitoring receives a new message.

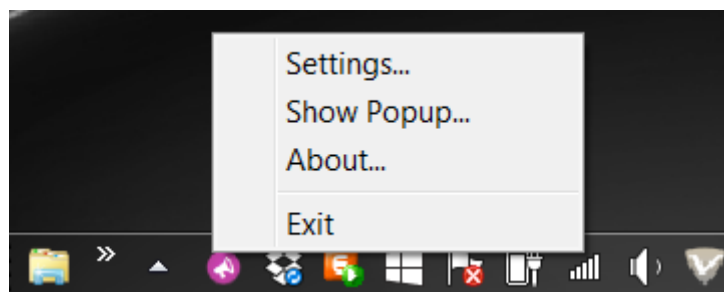


You can launch Message Alert by selecting **Message Alert** from the **Tools** menu. If you don't have access to other users' Inboxes then the option will be grayed out.

On start up Message Alert will minimize to the system tray/notification area.

Menu

Right-click on the Message Alert icon in the system tray/notification area to access the menu.



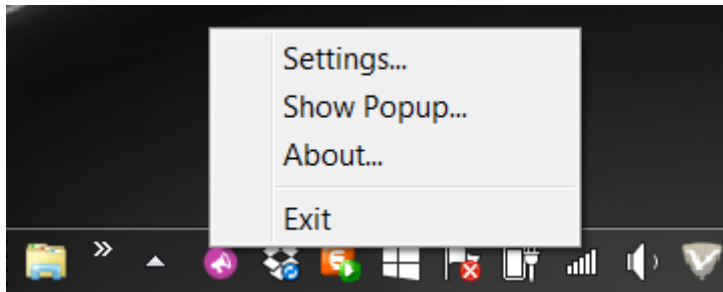
Settings	Opens the settings window.

Show Popup	Shows the popup notification window.
About	Displays information about MessageAlert, eg. Version Number.
Exit	Closes the application.

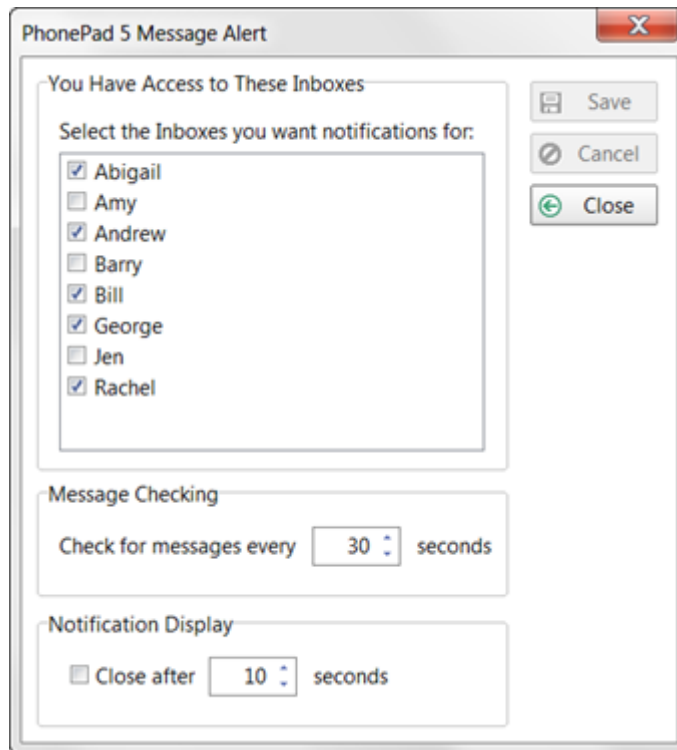
Setting Up Message Alert

Before you can start using Message Alert you will need to set it up:

1. Launch Message Alert by selecting **Message Alert** from the **Tools** menu.
2. Message Alert runs in the system tray/notification area of the Windows toolbar. When Message Alert starts it will minimize to that area.
3. Right-click on the purple Message Alert icon in the toolbar and select **Settings**.

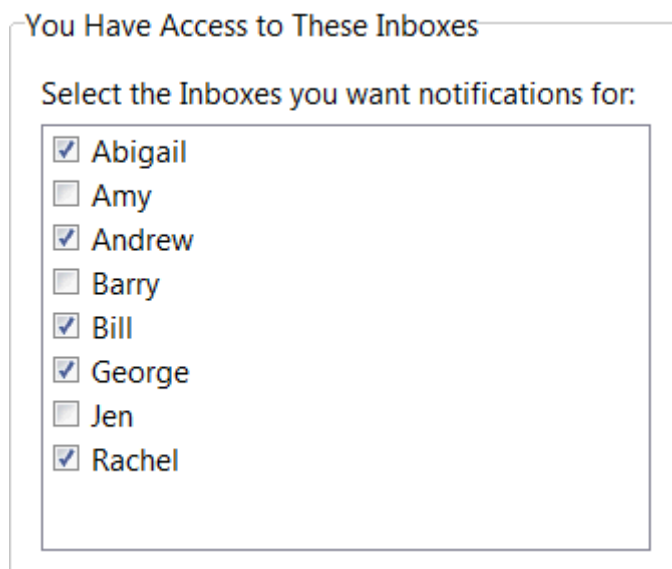


4. The Message Alert options window will open.



Select the Inboxes You Want to Monitor

This window displays a list of all Inboxes you have access to (your PhonePad Administrator sets this access).



Select which Inboxes you want to receive new message notifications for by checking the check box next to each name

Set the Message Checking Frequency

Set how often you want Message Alert to check for new messages. The default is 30 seconds.

Message Checking

Check for messages every seconds

Set the Notification Display

This setting determines how long the new message notification is displayed.

Notification Display

Close after seconds

If you check the **Close after x seconds** check box, the message notification will automatically close after the specified number of seconds.

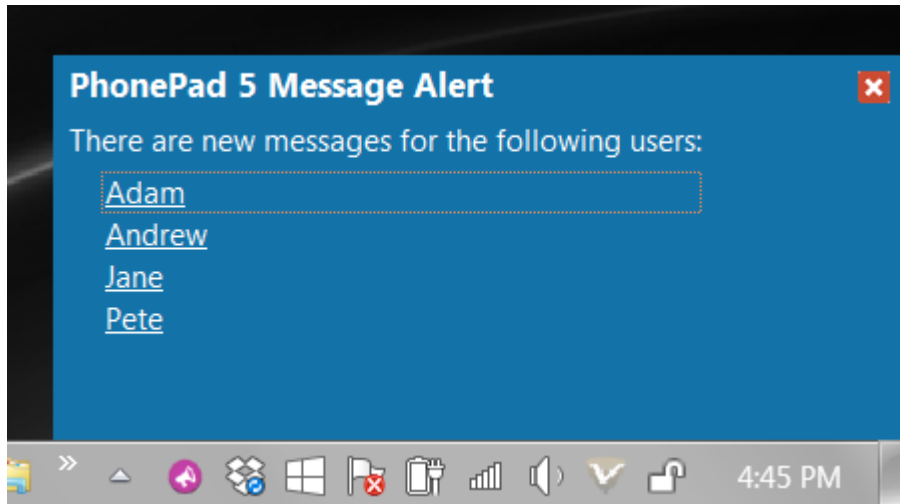
If you leave the **Close after x seconds** check box unchecked, the message notification window will stay open until you close it.

Save Your Settings

Click the **Save** button to save your settings, or click the **Cancel** button to cancel the changes.

Using Message Alert

When a new message is received in an Inbox you are monitoring, the user's name will appear in the Message Alert notification window.



You can go directly to the Inbox for that user by clicking their name.

When new messages are read by a user their name will drop off the list.

Starting and Stopping Message Alert Automatically

You can either open and close Message Alert manually via the **Tools** menu, or you can set PhonePad to open and close it for you (see Preferences - Message Alert).

Chapter

18

ToDo List

ToDo List

The **ToDo List** add-on provides a "to-do" list style application that can be used to track tasks that you need to do. It complements the Follow Up features of PhonePad.

One of the main differences between PhonePad's ToDo List and other "to-do" lists integrates tightly with PhonePad.

To access the **ToDo List**, click on the **ToDo List** button on the **Follow Up** tab of the toolbar, or select **ToDo List** from the **Tools** menu.



Chapter

19

WhereRU

WhereRU

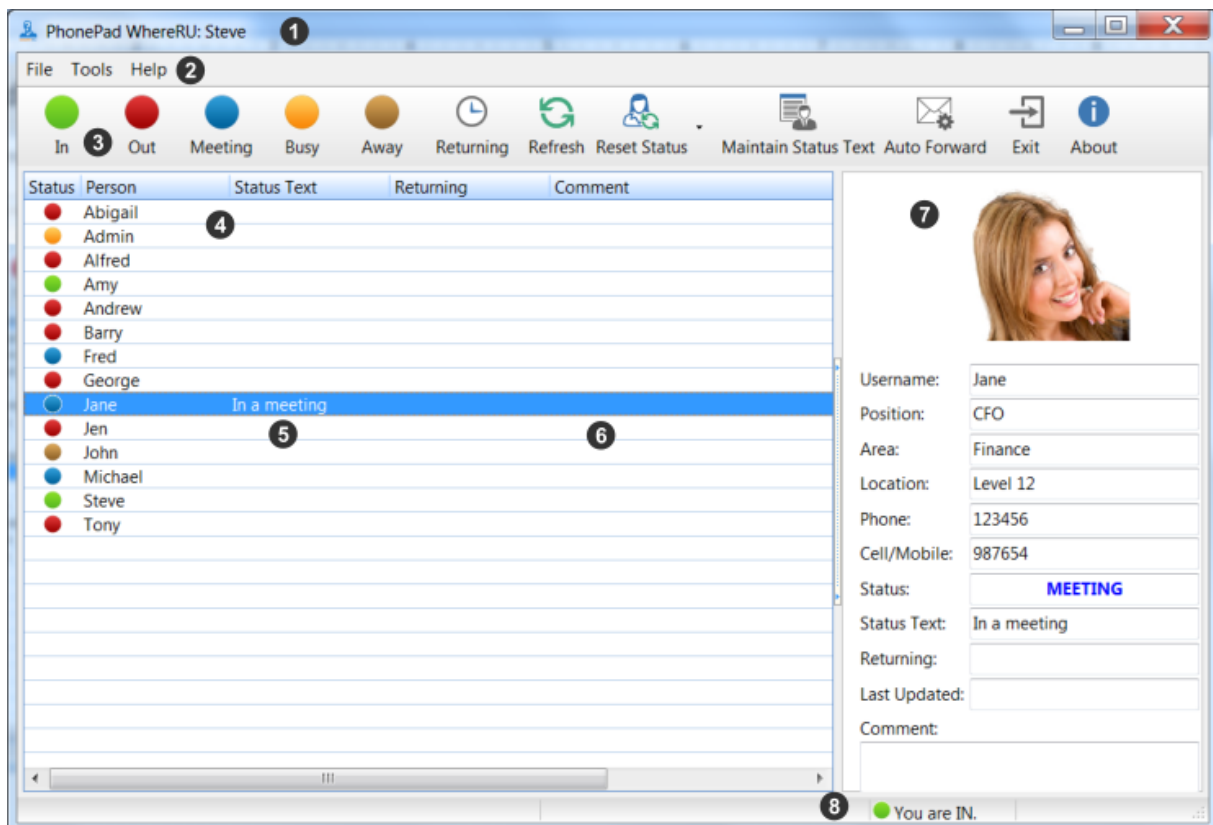
WhereRU provides a simple way for an organization to keep track of their staff. A quick glance at the screen tells you the availability of everyone in your office. Used in conjunction with PhonePad, you can pass on information to callers while taking a message for the person they called.

To open WhereRU, click the **WhereRU** button on the **Home** tab of the toolbar, or select **WhereRU** from the **Tools** menu.

User Interface

Main Window

The main window of WhereRU features a menu bar, a toolbar, a User Details pane, and a status bar. There is a splitter between the user list and the User Details pane that can be resized, opened or closed.

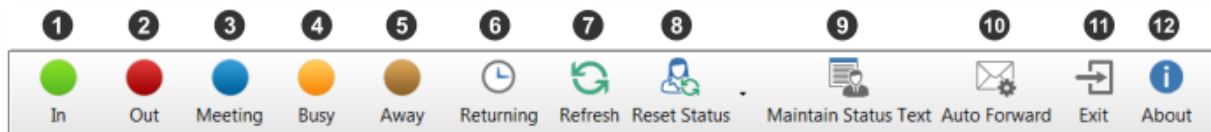


1	The title bar shows the name of the user logged in.
2	Menu bar.
3	Toolbar.

4	User list.
5	Status text field, which can be edited directly in the list.
6	Comments field, which can be edited directly in the list.
7	User information panel.
8	Your status.

Toolbar

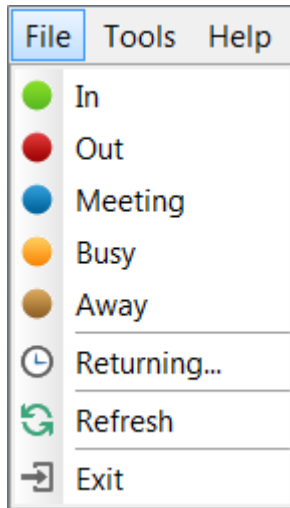
WhereRU has its own toolbar.



1	Change your status to IN.
2	Change your status to OUT.
3	Change your status to MEETING.
4	Change your status to BUSY.
5	Change your status to AWAY.
6	Set the time you will return.
7	Refresh the user list.
8	Reset your status.
9	Maintain status text used by all users. Only accessible to administrators.
10	Set your <i>Automatic Message Forwarding</i> settings. Administrators can also change these settings for other users.
11	Close WhereRU.
12	Display information about WhereRU.

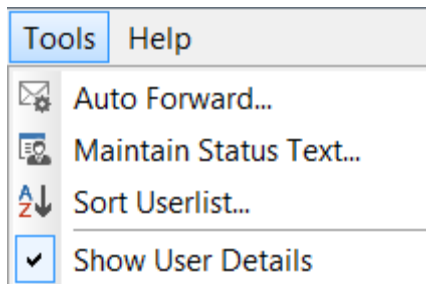
Menus

File Menu



In	Change your status to IN.
Out	Change your status to OUT.
Meeting	Change your status to MEETING.
Busy	Change your status to BUSY.
Away	Change your status to AWAY.
Returning	Set the time you will return.
Refresh	Refresh the user list.
Exit	Close WhereRU.

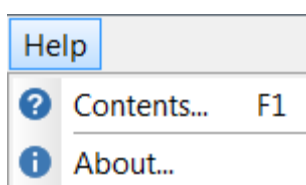
Tools Menu



Auto Forward	Set your <i>Automatic Message Forwarding</i> settings. Administrators can also change these settings for other users.
---------------------	---

Maintain Status Text	Maintain status text used by all users. Only accessible to administrators.
Sort Userlist	Used to specify the order of users displayed in the user list. Only accessible to administrators.
Show User Details	When checked, the <i>User Details</i> panel will be visible.

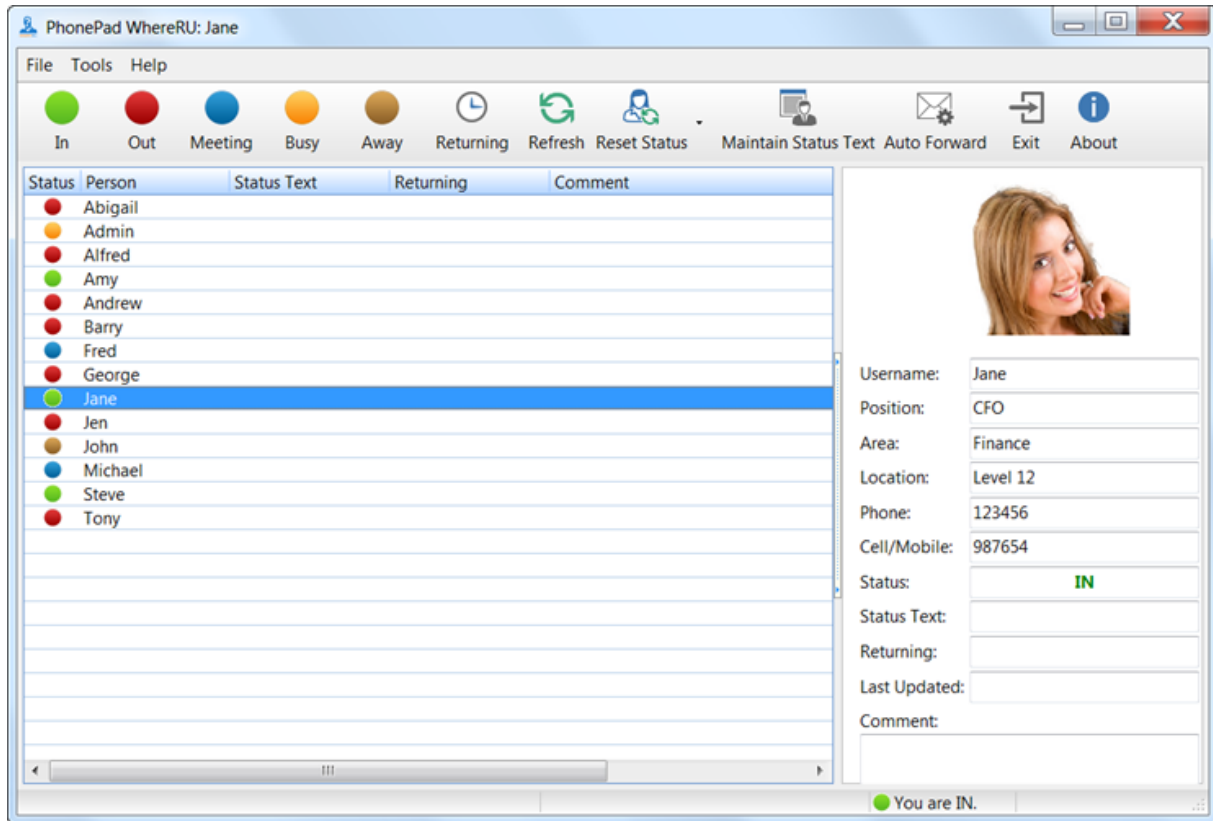
Help Menu



Contents	Display help.
About	Display information about WhereRU.

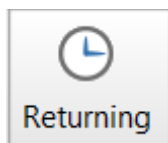
Setting Your Status

Setting your current status is easy. Just select your name in the list of users and click the appropriate status button (*In, Out, Meeting, Busy* or *Away*).

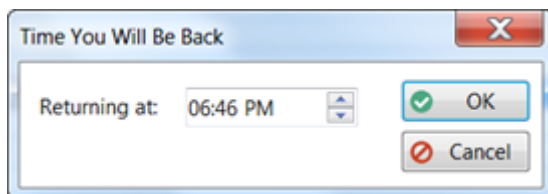


Setting a Return Time

You can specify the time you expect to return. Select your name in the list, then click the **Returning** button on the toolbar, or select **Returning** from the **File** menu.



The *Time You Will Be Back* window will be displayed.



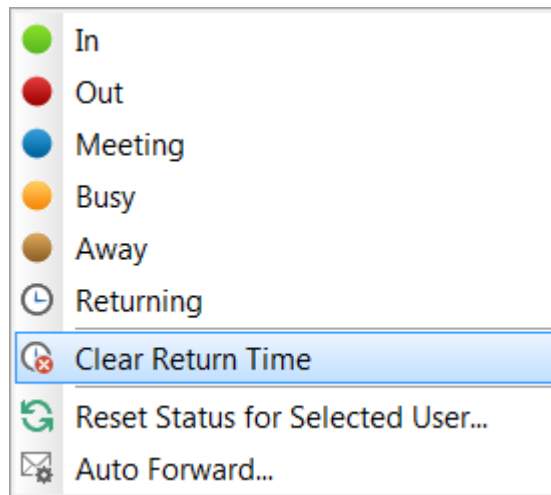
You can edit the time directly, or you can use the up and down arrows keys on your keyboard to change the hour, minutes and am/pm. You can also use the up and down arrow buttons of the **Returning at** field. Click **OK** when you have entered a time.

● Fred	
● George	
● Jane	6:46 PM
● Jen	
● John	

The time will be displayed next to your name in the user list.

Clearing a Return Time

To clear the return time, right-click on your name and select **Clear Return Time** from the popup menu.








Setting Status Text

Pre-defined status text can be added to your status (or another user's status if you're an administrator) by clicking in the *Status Text* column and selecting from the drop-down list.

● George		
● Jane		▼
● Jen		At Lunch
● John		Away sick
● Michael		In a meeting
● Steve		

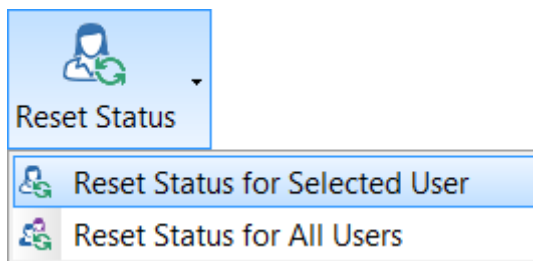
Comments

Comments can be entered directly in the user list against your name by clicking in the *Comments* column typing in a comment.

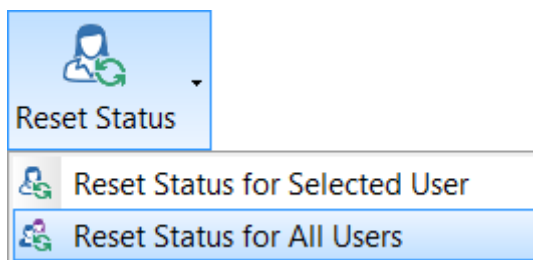
	Freu			
	George			
	Jane	In a meeting	2:30 PM	Meeting with Dr Anderson.
	Jen			
	John			

Resetting Your Status

You can reset your status by selecting your name and then clicking the **Reset Status** button on the toolbar and selecting **Reset Status for Selected User** from the menu.




Administrators can reset other users' statuses by using the same option. They can also reset the status of all users at once by clicking the **Reset Status** button on the toolbar and selecting **Reset Status for All Users** from the menu.



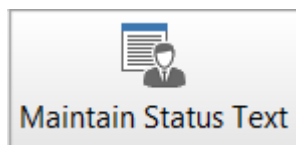
User Details

When a user is selected in the user list, their details will be displayed in the *User Details* panel on the right side of the main window.

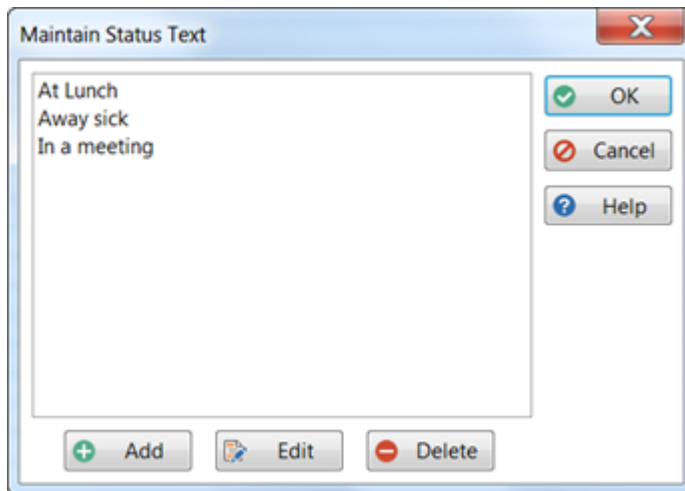
	
Username:	Jane
Position:	CFO
Area:	Finance
Location:	Level 12
Phone:	123456
Cell/Mobile:	987654
Status:	MEETING
Status Text:	In a meeting
Returning:	2:30 PM
Last Updated:	
Comment:	Meeting with Dr Anderson.

Maintain Status Text

If you are an administrator you can maintain the status text that is used in WhereRU. Click the **Maintain Status Text** button on the toolbar, or select **Maintain Status Text** from the **Tools** menu.

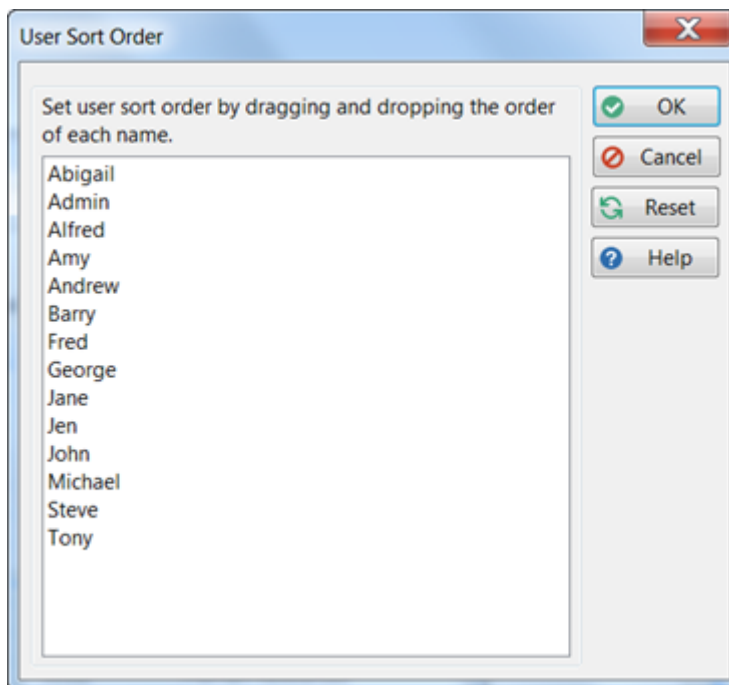


Use the **Add**, **Edit** and **Delete** keys to manage the status text, then click **OK** to save your changes.



Sorting the User List

The user list in WhereRU defaults to alphabetical order. If you are an administrator you can manually change this order. Select **Sort Userlist** from the **Tools** menu.



Order the usernames and by dragging and dropping them. Click **OK** to save your changes.

You can reset the list back to the default order by clicking the **Reset** button.

Automatic Message Forwarding

You can change your *Automatic Message Forwarding* settings (you can also do this in PhonePad) by clicking the **Auto Forward** button on the toolbar, or by selecting **Auto Forward** from the **Tools** menu.



If you are an administrator you can change these settings for other users.

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Chapter

20

WorkstationConfig

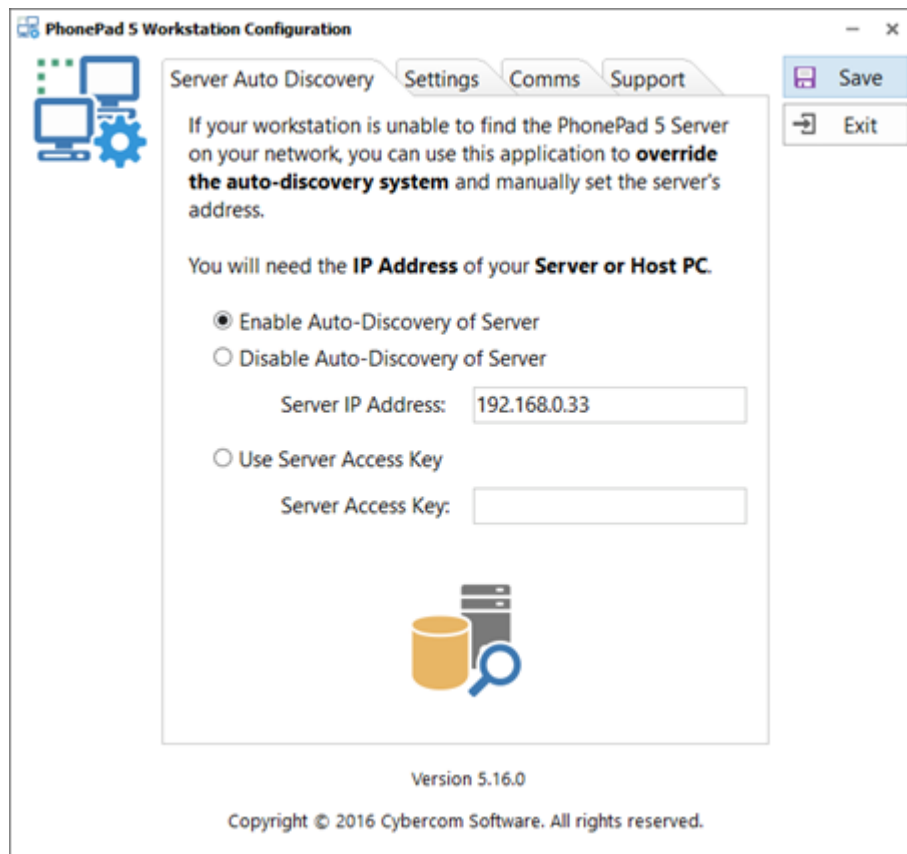
WorkstationConfig

The WorkstationConfig program is used to correct any issues you may have with PhonePad 5 Workstation.

It has 4 tabs:

- Server Auto Discovery
- Settings
- Comms
- Support

Server Auto Discovery



These settings are used to override the server auto-discovery system. You would use this in the following circumstances:

- UDP broadcasts are blocked on your network and so PhonePad is unable to find a server.
- You have a Wide Area Network.
- You have more than one PhonePad Server on your network.

Enable Auto-Discovery of Server

This is the default setting. PhonePad will try to locate a PhonePad Server on your network and establish a connection.

Disable Auto-Discovery of Server

If PhonePad is unable to locate a PhonePad Server on your network, and you have checked to make sure the server is running, then you may need to turn Auto-Discovery off and specify the IP Address of the Server.

There is a downside to using this method. If the Server's IP Address changes then the IP Address you entered here will no longer be valid. This means you will have connection problems again until you enter the Server's new IP Address.

If the Server's IP Address is likely to change, you are better off using the Server Access Key option instead of just disabling Auto-Discovery.

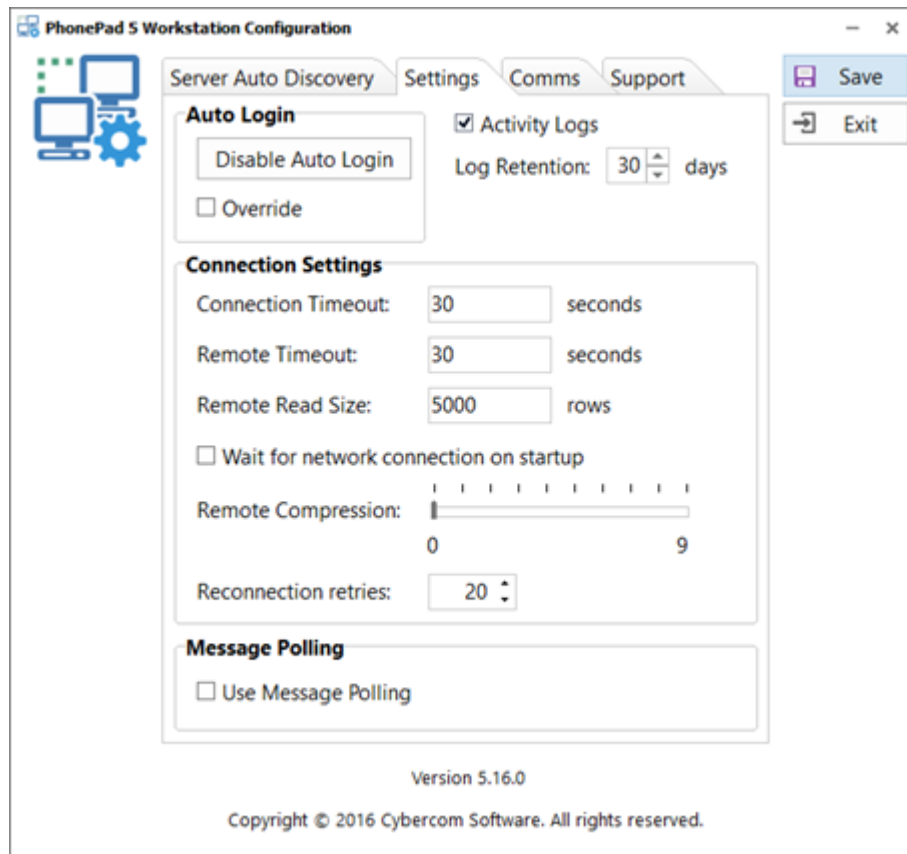
Use Server Access Key

This option also disables Auto-Discovery. Instead of specifying the Server's IP Address, it uses a Server Access Key to find out the Server's IP Address.

The way this works is that your PhonePad Administrator creates a Server Access Key on the Server using Control Center. They then give you this Access Key to enter under Server Access Key. Your PhonePad Server will regularly contact the Server Access Key system on our web server, updating its IP Address. When you start PhonePad it uses the Server Access Key to retrieve the Server's IP Address from the Server Access Key system using the Server Access Key.

In order for this to work, PhonePad needs to be able to access our web server via the Internet.

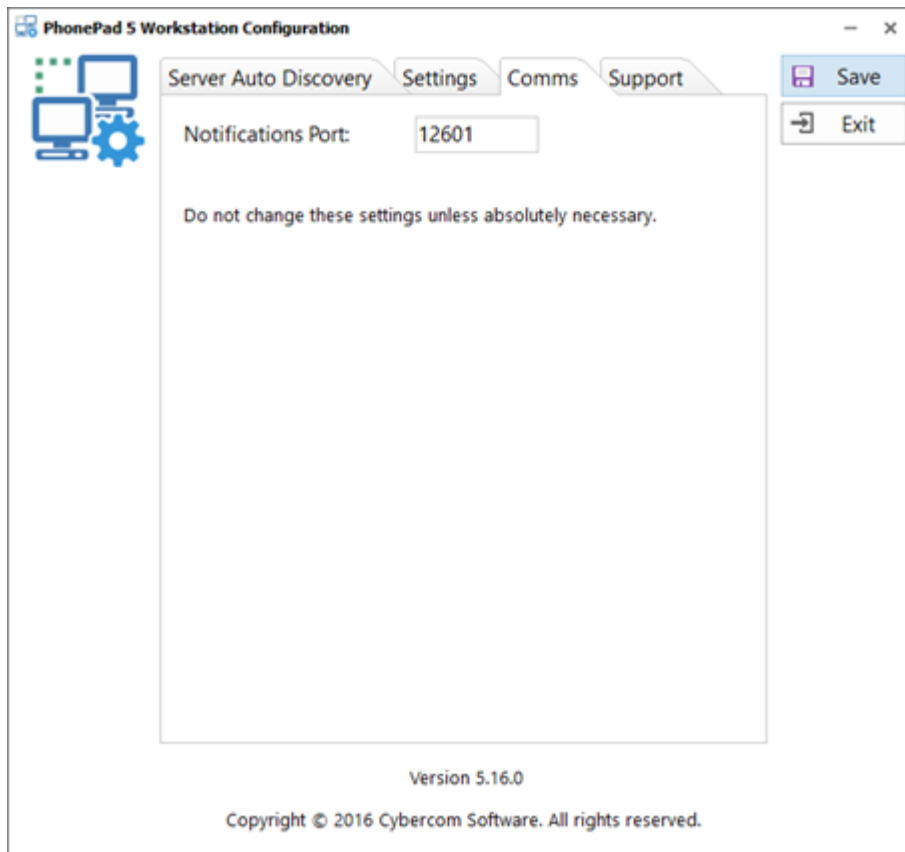
Settings



Disable Auto Login	Click this button to disable Auto Login for the logged in user.
Override	When checked, Auto Login is disabled.
Activity Logs	When checked, the workstation will produce activity logs. It is recommended you leave this option checked.
Log Retention	Specifies the number of days logs will be kept for. Any logs older than the set period will be automatically deleted. The default is 30 days.
Connection Timeout	Specifies how long PhonePad will wait to establish a connection.
Remote Timeout	Specifies how long PhonePad waits for a response from the server after a connection has been established.
Remote Read Size	Specifies how much data should be read for each data request.
Wait for Network Connection on Startup	When checked, PhonePad will wait for a network connection to become available before attempting to connect to the server.

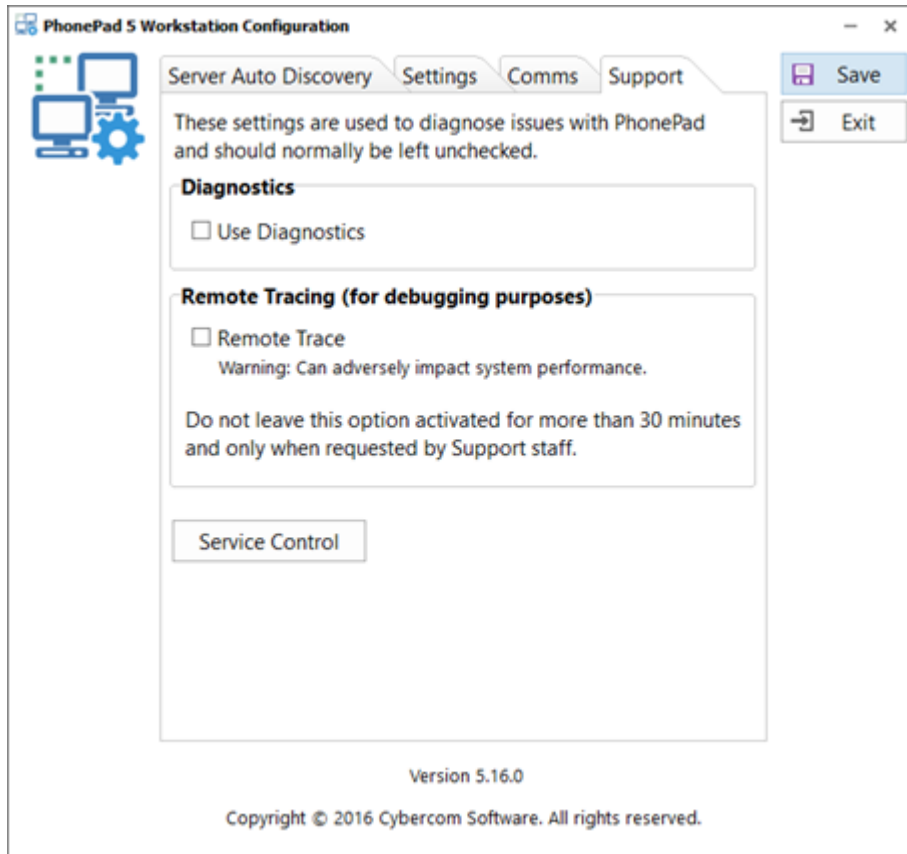
Remote Compression	Determines whether or not data exchanged between the workstation and server is compressed or not, and the level of compress used. The default is 0.
Reconnection Retries	Specifies the number of times PhonePad should try to establish a connection with the server when the connection times out on initial connection.
Use Message Polling	When checked, PhonePad will poll the server checking for new messages. This option will override the Message Notification Service and can adversely affect performance.

Comms



Notifications Port	This is the port used by PhonePad for notifications sent from the server. The default is 12601 and it should be left at this value.
---------------------------	---

Support



Use Diagnostics	When checked, the workstation will add detailed information to activity logs. It is recommended you leave this option unchecked unless asked to turn it on by Support.
Remote Trace	This option is used to trace communication between a workstation and the server. It is strongly recommended you leave this option unchecked as it can severely impact application responsiveness and is only intended to be used for very short periods.
Service Control	Allows an administration to restart PhonePad services running on the Server or Host PC from any workstation.

Chapter

21

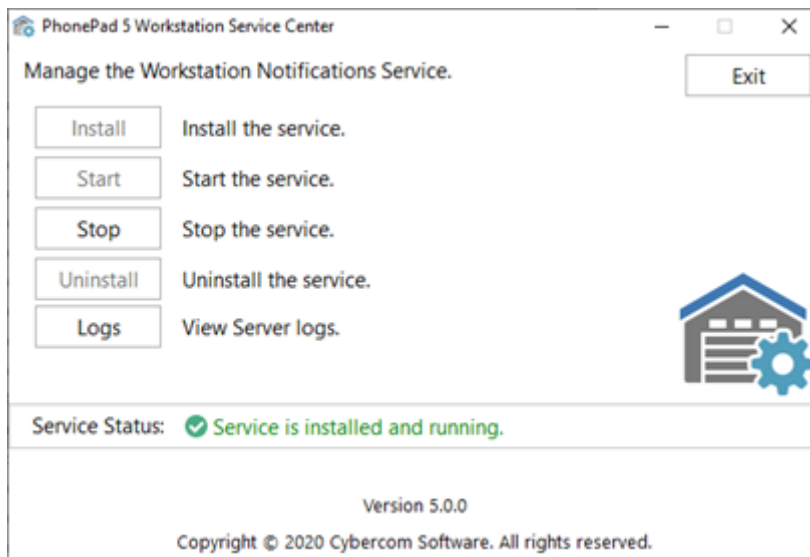
Workstation Service Center

Workstation Service Center

This application is used to control the PhonePad Windows services installed on a workstation. It is similar to the **Control Center** on the Server.

Currently there is only one PhonePad service running on workstations and you should normally never need to use this application.

To start **Workstation Service Center**, you need to right-click on it and select **Run as Administrator** from the popup menu (this is required by Windows because the application has to run with "elevated access").



Chapter

22

Example Scenarios

Example Scenarios

This section covers examples on how PhonePad can be set up for different types of offices. More examples will be added in the future.

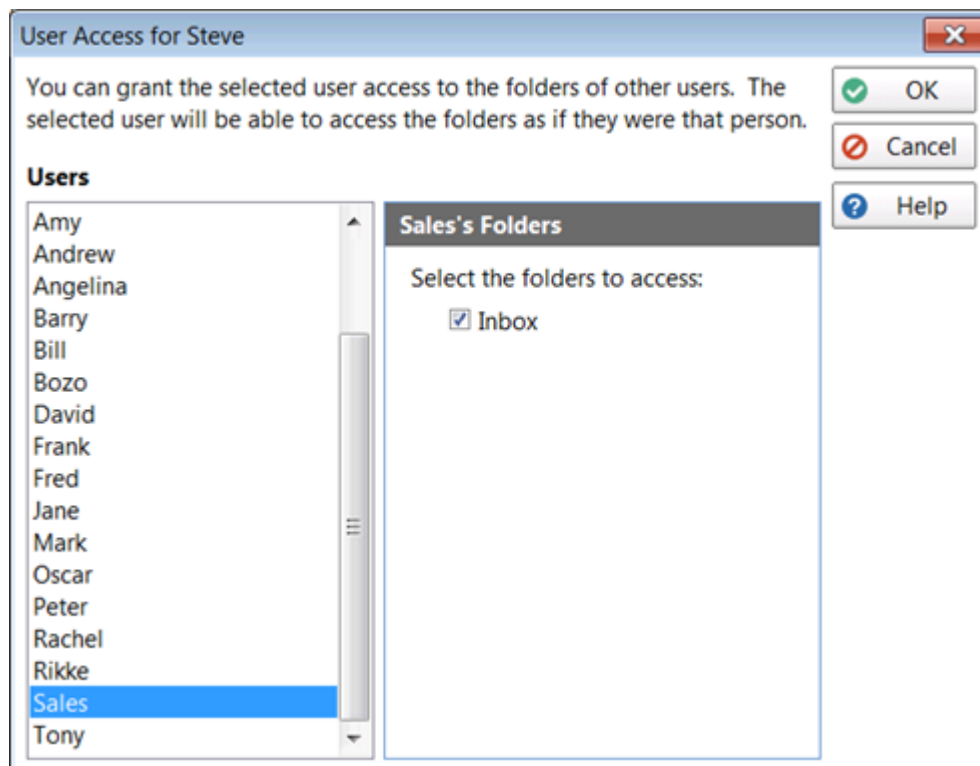
Setting Up a Common Inbox

If you want an Inbox that is easily accessible by all users, there are a couple of ways you can set this up.

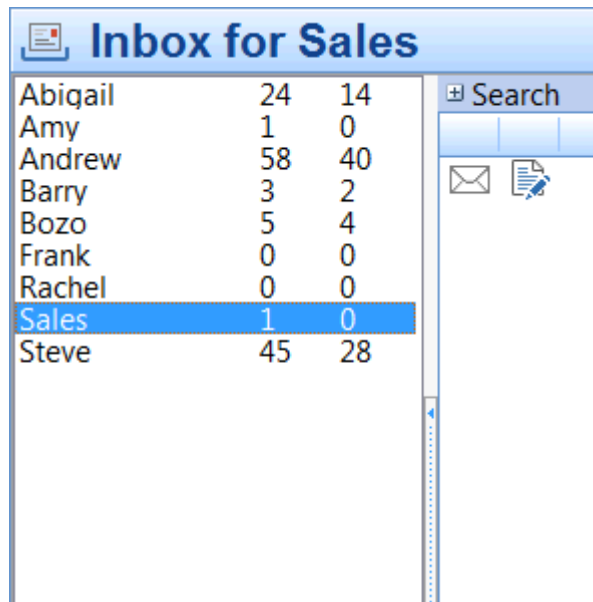
A. Disabled User Account

The first method is to use a disabled user account:

1. Select **User Management** from the **Admin** menu.
2. Add a new user, eg. Sales.
3. Uncheck the **Login Enabled** check box.
4. Select a user from the list of users and click the **Access** button.
5. Give the user access to the new user account you created.
6. Repeat steps 3 to 4 for each user.



The new user will appear in the user list for each user.



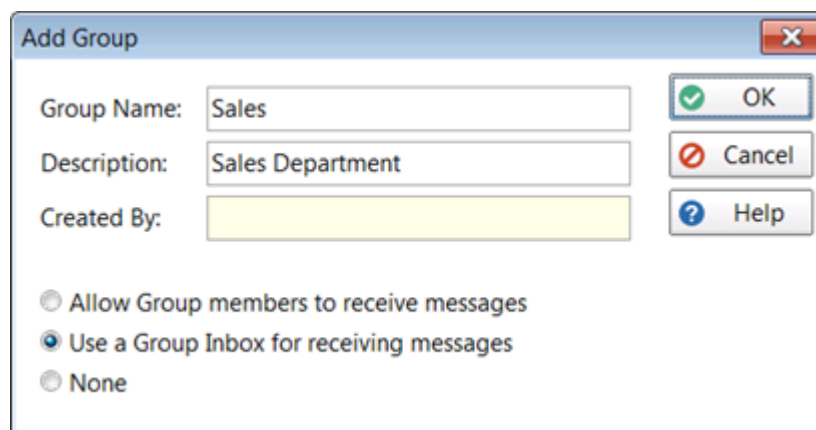
Inbox for Sales		
Abigail	24	14
Amy	1	0
Andrew	58	40
Barry	3	2
Bozo	5	4
Frank	0	0
Rachel	0	0
Sales	1	0
Steve	45	28

When logging phone messages simply send them to the user you created. All users will be able to access the messages from that Inbox via the user list (as shown above).

B. Group Inbox

The second method is to create a Group Inbox:

1. Select **Groups** from the **Admin** menu.
2. Click **Add** to add a new group (or select an existing group and click **Edit**).
3. Select **Use a Group Inbox for receiving messages**.



Add Group

Group Name:

Description:

Created By:

Allow Group members to receive messages

Use a Group Inbox for receiving messages

None

OK Cancel Help

4. Click **OK**.

The Group Inbox will appear in the user list for each group member, usually at the top. Group Inboxes are always in uppercase and are prefixed with a #.

Inbox for Steve			Search	
#SALES	1	0		
Abigail	24	14		
Amy	1	0		
Andrew	58	40		
Barry	3	2		
Bozo	5	4		
Frank	0	0		
Rachel	0	0		
Steve	45	28		
			ID	
				64
				64
				63
				63
				62
				62
				62
				61
				61
				61
				60
				60
				60

When logging phone messages, address them to the Group you created. Users will then be able to access the Group Inbox via the user list (as shown above).

The added advantage of using groups is that you can set up Group Inboxes for different areas within your organization. For example, auto details may want to set one up for Sales and another one up for Service.



When you click the **OK** button, PhonePad will create a Group Inbox and all group members will automatically be given access to it.

PhonePad for Answering Services

We often get asked if PhonePad can be used by an answering service. This is how many answering services use PhonePad 5 to manage their calls (this will need to be done by a PhonePad 5 administrator).

Step 1: Create a User Account for Each Client

1. Select **User Management** from the **Admin** menu.
2. Add a new user, eg. *John_Smith*.

3. Uncheck the **Login Enabled** check box.
4. Select your username from the list of users and click the **Access** button.
5. Give yourself access to the new user account you created.
6. Repeat steps 3 to 4 for each user.

Step 2: How to Use It

When logging phone messages simply send them to the relevant client you created.

The client's names will appear in your user list. You can access each client's messages by selecting their name from the user list.

When you have passed on a message onto a client, select the message and click the **Mark as Completed** button.



You could use **MessageSender** to automatically forward client's messages to an email address or their cell/mobile phone.

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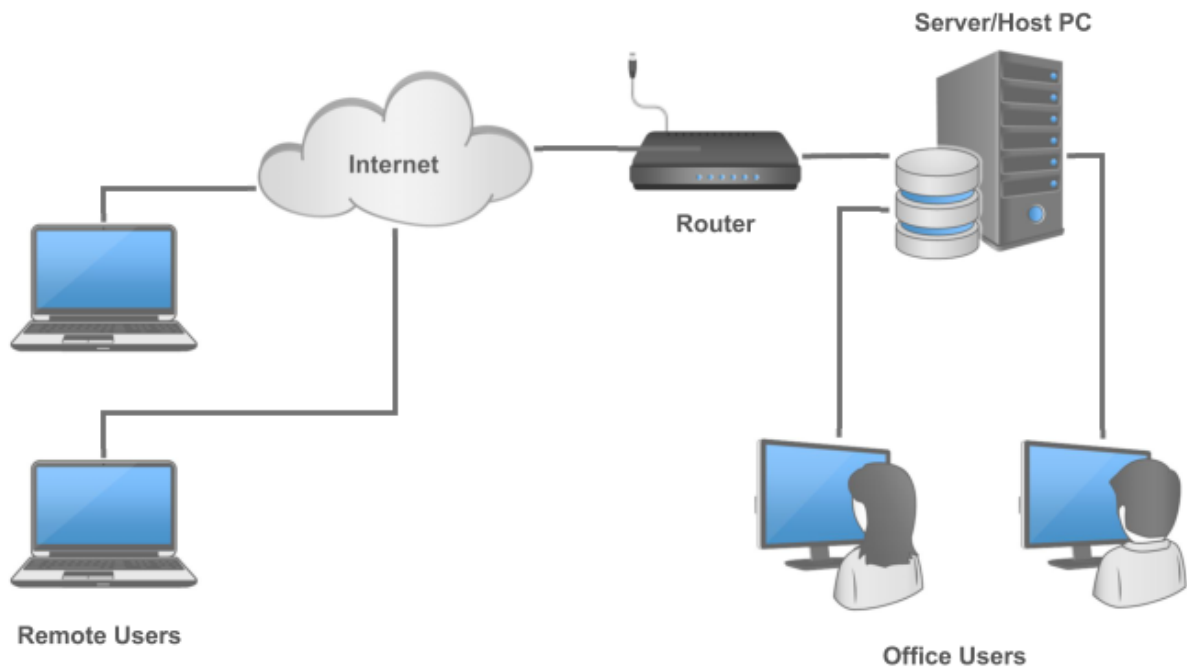
Chapter

23

**Connecting Remotely Over the
Internet**

Connecting Remotely Over the Internet

With **PhonePad Remote** you can connect and login to PhonePad in the office no matter where you are. All you need is a Windows desktop computer or laptop and an Internet connection.



Before you can start connecting remotely there are some things that need to be done:

- Your PhonePad Administrator has to enable remote connections in PhonePad, and configure your router to allow the connections.
- You will need a Remote Access Code from your PhonePad Administrator.
- PhonePad 5 Workstation should be installed on the computer you will be using to connect remotely.

Once that's all be done, run PhonePad Remote on your remote computer.

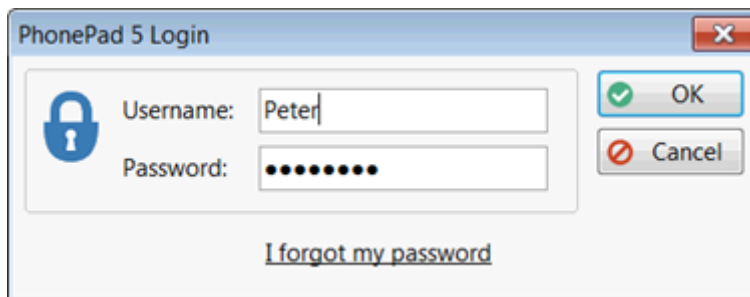
1. Enter your **Remote Access Code**.



2. Click the **Connect** button



3. PhonePad Remote will attempt to connect to the PhonePad 5 Server in your office. If all goes well you should be presented with the PhonePad 5 login window.



4. Login as you normally would. You will then be able to use PhonePad the same as you would when you are in the office.



PhonePad Remote will only be as fast as your Internet connection. If you have a slow connection then you should avoid using any features in PhonePad 5 that may take a long time to execute.

Chapter

24

Updating PhonePad

Updating PhonePad

PhonePad 5 includes an easy way to update your software to the latest version whenever one is released. Instead of going to the PhonePad website to look for updates, you can check from within PhonePad.

There are basically 3 types of updates in PhonePad 5:

- Server Updates
- Workstation Updates
- Database Updates

Server Updates

A server update includes updates to the server itself, support applications (eg. Database Restore), and documentation (help files, user guides, etc.).

These updates are handled by the application updates.

Workstation Updates

This includes updates to the PhonePad workstation applications (PhonePad5.exe, PhonePad5Run.exe, InstantChat.exe and WhereRU.exe) as well as documentation (help files, user guides, etc.).

These updates are handled by the application updates.

Database Updates

Database updates are changes to your PhonePad 5 database. These include altering your database to fix problems or adding new features.

These updates are handled by the application updates.

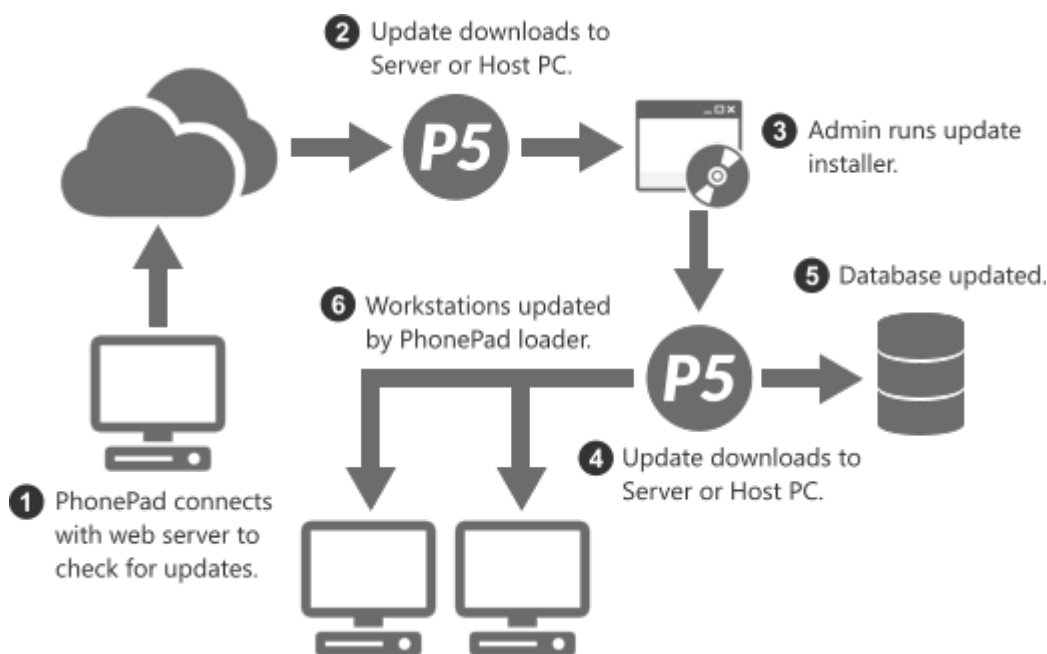


IMPORTANT WARNING: Unless you want to start with a new **blank** database, do **not** try updating PhonePad by downloading the latest full server installer from the website. It is designed for fresh, clean installs **not** updates. You need to download updates using the **Application Updates** feature, or by downloading updates from your account at www.myphonepad.com.

If you use the full server installer to update your Server or Host PC **it will delete your existing PhonePad database.**

How Updating Works

PhonePad 5 has a built-in update system that makes it easy to update your Server or Host PC and each workstation.



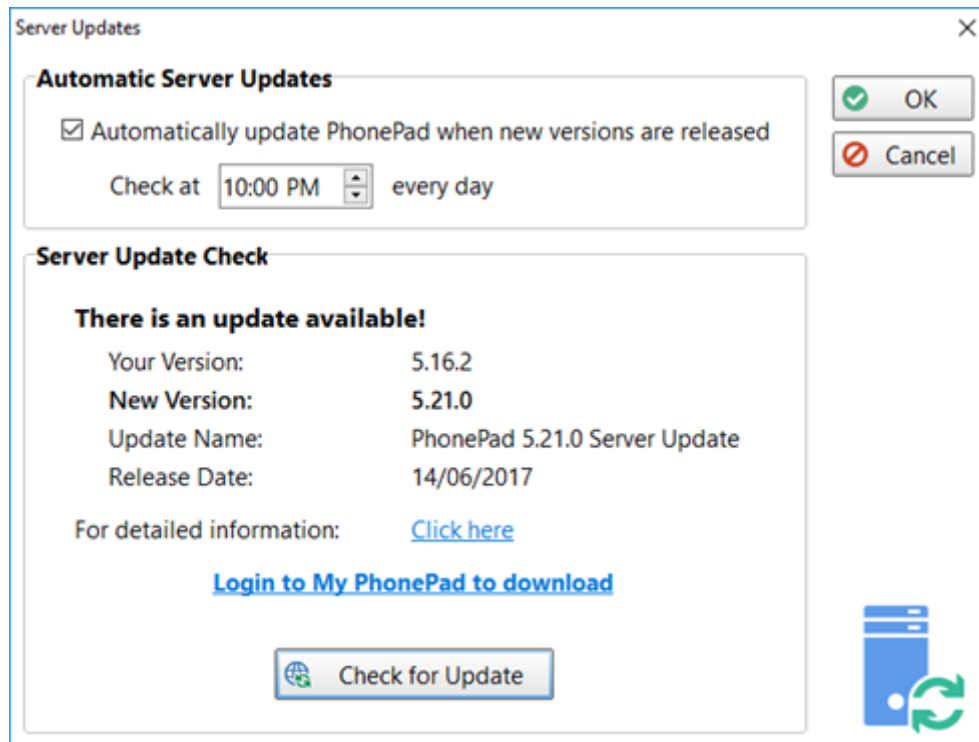
When you install an update on your Server or Host PC, each workstation will be automatically updated the next time the user logs in. No more walking around to each computer and installing an update manually - it's all done for you.

Your PhonePad database will be analyzed and updated to the latest version of the database.

Installing Server Updates

All PhonePad 5 updates are done in the form of server updates. These are always done on the Server or Host PC.

Select **Server Updates** from the **System Admin** menu, or click the **Server Updates** button on the **System Admin** tab.



Automatic Server Updates

Check the **Automatically update PhonePad when new versions are released** checkbox to install server updates whenever they are released. They will then be propagated out to the workstations when users start PhonePad.

Set a time each day for PhonePad to check for new versions. Whenever one is found it will be automatically installed.

For Automatic Server Updates to work the **ServerAutoUpdates** service must be installed on the Server or Host PC.

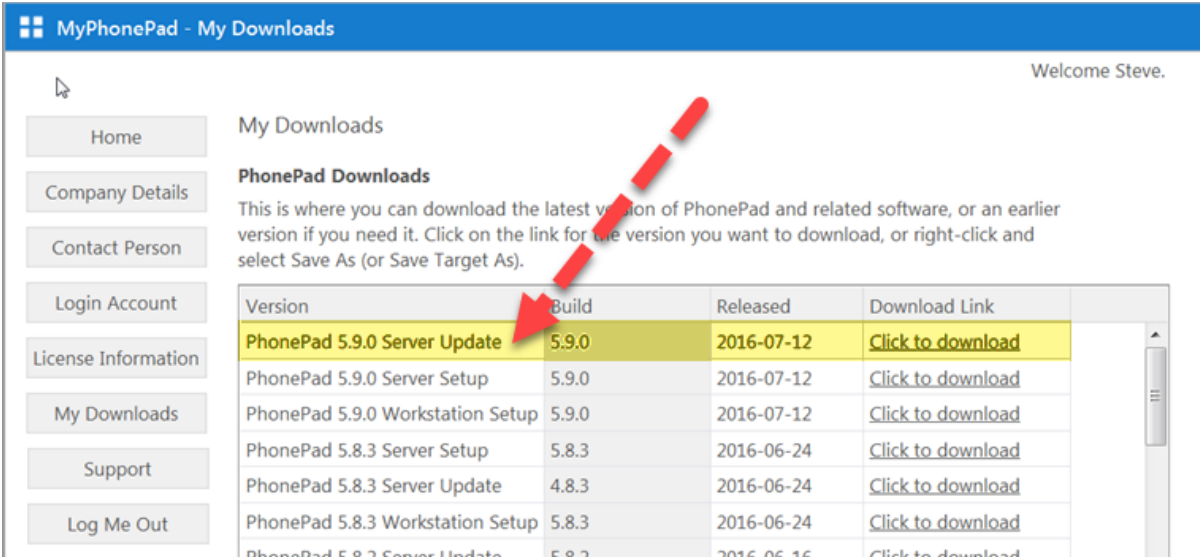
Server Update Check

You can manually check for new versions at any time by clicking the **Check for Update** button. If there is one available, the details will be displayed. If you don't want to use automatic updates then you can login to your MyPhonePad account to download it. Remember, it must be downloaded to and installed on your Server or Host PC.

Updating PhonePad from My PhonePad

Login to your My PhonePad account at www.myphonepad.com.

1. Select **My Downloads**.



MyPhonePad - My Downloads

Welcome Steve.

Home

Company Details

Contact Person

Login Account

License Information

My Downloads

Support

Log Me Out

My Downloads

PhonePad Downloads

This is where you can download the latest version of PhonePad and related software, or an earlier version if you need it. Click on the link for the version you want to download, or right-click and select Save As (or Save Target As).

Version	Build	Released	Download Link
PhonePad 5.9.0 Server Update	5.9.0	2016-07-12	Click to download
PhonePad 5.9.0 Server Setup	5.9.0	2016-07-12	Click to download
PhonePad 5.9.0 Workstation Setup	5.9.0	2016-07-12	Click to download
PhonePad 5.8.3 Server Setup	5.8.3	2016-06-24	Click to download
PhonePad 5.8.3 Server Update	4.8.3	2016-06-24	Click to download
PhonePad 5.8.3 Workstation Setup	5.8.3	2016-06-24	Click to download
PhonePad 5.8.2 Server Update	5.8.2	2016-06-16	Click to download

2. The latest version will appear at the top of the list.
3. Select the latest *Server Update* and click the **Click to Download** link.
4. Save the download and run it on your Server or Host PC.

With each release there are 3 setup programs:

Server Update *eg. PhonePad 5.9.0 Server Update* This setup program is used to update your PhonePad 5 Server and PhonePad 5 Workstation to the specific version.

Server Setup *eg. PhonePad 5.9.0 Server Setup* This setup program is used for **new installations** of the PhonePad 5 Server on your Server or Host PC.

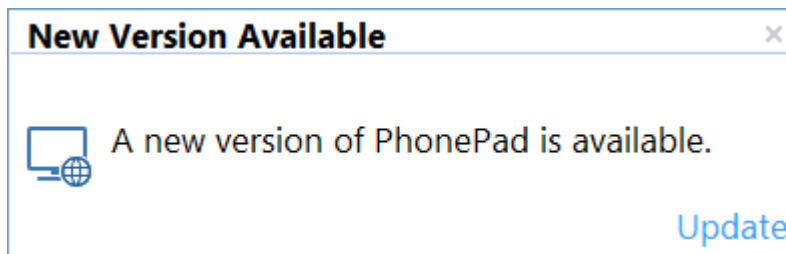
Caution: If you run it on a Server or Host PC that already has PhonePad 5 Server installed, it will overwrite your existing PhonePad 5 database.

Workstation Setup *eg. PhonePad 5.9.0 Workstation Setup* This setup program is used to install PhonePad 5 Workstation **on a new computer**.

It should not be used to update a workstation, unless you really want a fresh install.

Update Notifications

In addition to being able to check for new versions of PhonePad manually, administrators will get a popup notification in the system tray when a new version is available for download.



Clicking the **Update** link will take you to the Server Updates screen.

Chapter

25

Troubleshooting Problems

Troubleshooting Problems

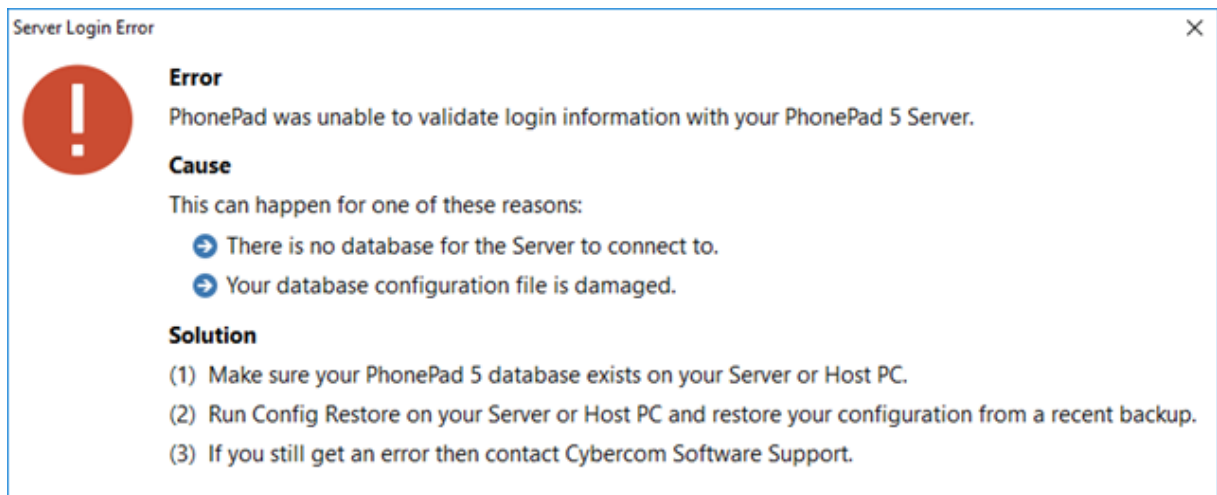
These are the most common problems users have experienced.

Startup Problems

This section describes some of the most common start up errors.

Login Validation Error

If this error appears when starting PhonePad, it's usually an indication that your database configuration file has been damaged.



A damaged configuration file can be caused by:

- A Operating System issue.
- A hardware issue or fault.
- The Server or Host PC is powered down without going through the normal Windows shutdown process.
- The Server or Host PC crashes.
- Power surges or lightning strikes.

The PhonePad 5 Server automatically backs up your database configuration file on a daily basis, so if you do get this error you can quickly restore a backed up configuration file (provided that is not damaged as well).

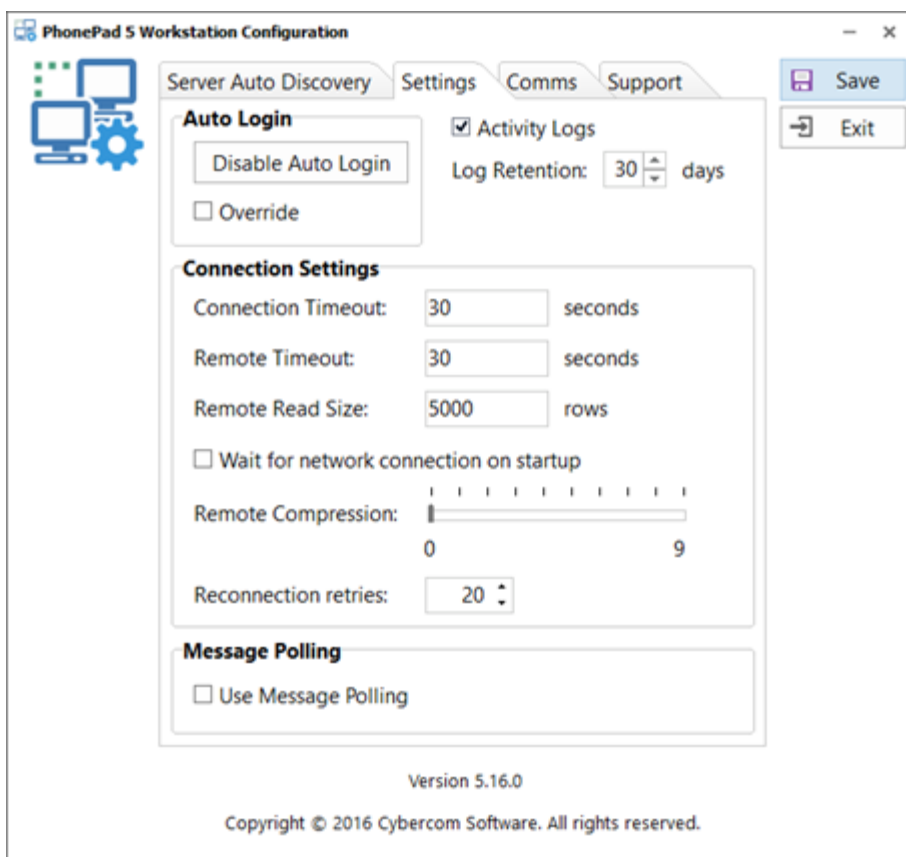
Windows Startup

If you have PhonePad configured to start automatically when Windows starts, in some cases PhonePad may not be able to establish a connection with the Server or Host PC.

Sometimes it can take a few seconds or more for the workstation's network adapter to connect to your network. If this happens then PhonePad will be unable to locate your PhonePad 5 Server will probably display a connection error or may just sit there in a state of limbo.

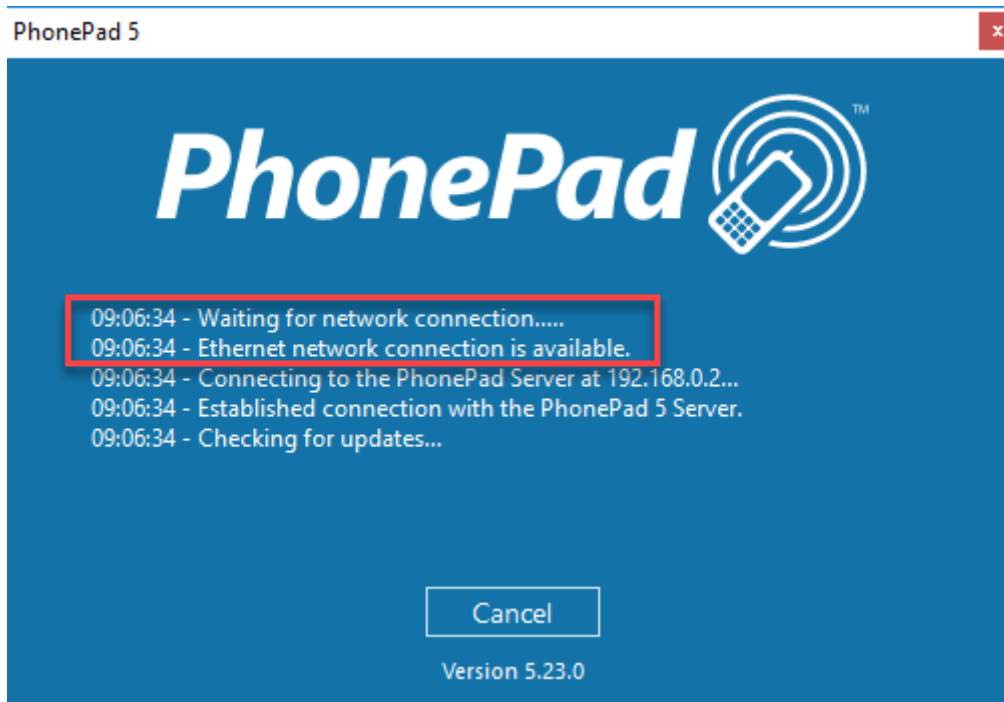
To resolve this, you can configure PhonePad to wait until a network connection is available:

1. Go to the *PhonePad 5 folder* on your workstation.
2. Run **Workstation Config**.
3. Select the **Settings** tab.



4. Check the *Wait for network connection on startup* check box.
5. Click **Save**.

When you start PhonePad now you will see that it waits for a network connection before proceeding.



Freezing on Startup

If PhonePad freezes when starting it on your workstation, the most common cause is anti-virus software (or anti-malware, anti-spyware, etc.). This can happen in the following situations:

- You have installed PhonePad for the first time.
- You have updated PhonePad to a new version.
- Your anti-virus software has been updated.

Check your anti-virus software to make sure it is configured to allow PhonePad to run, and that it does not perform any type of real-time scanning of PhonePad. Unfortunately we cannot offer advice or instructions on how to do this as there are dozens of anti-virus products available, and their interfaces change frequently.

You may need to do these checks on both your workstation(s) and Server or Host PC.

Connection Issues

If PhonePad has trouble connecting to the PhonePad 5 Server, there is a program in the PhonePad 5 Server folder on your Server or Host PC called **Process Monitor**. You can use Process Monitor to check

to make sure that PhonePad 5 Server has the appropriate ports open, which are: 12600, 12601, 12602, 12603 and 15350.


Run **ProcessMonitor**. You should see the following screen.

Process	ID	Local Address	Local Port	Protocol	Status
PhonePad5Server.exe	14220	JUPITER2	12600	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12601	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12602	TCP	Listen
PhonePad5Server.exe	14220	192.168.0.2	12603	TCP	Listen
PhonePad5Server.exe	14220	JUPITER2	15350	UDP	

When PhonePad 5 Server is running you should see similar results. Of course, the process ID and Local Address will be different, but the Local Ports and Protocols should be the same.

If port 12600 is not displayed then there is a problem with the port.

1. **Try stopping and starting the PhonePad 5 Server** using Control Center to see if that resolves it.
2. Check to make sure there are no firewalls blocking the connection.
3. Check your anti-virus/anti-malware/anti-spyware software to see if that is blocking the connection.

 Process Monitor can also be started from the Control Center. Just select **PhonePad Server** and then click the **Processes** button.

I/O Error 103

If you get this error when starting or using PhonePad 5, it is a Windows permissions problem, ie. you don't have sufficient access rights to specific folders on your workstation.

PhonePad often needs to be able to write to these folders so that it can automatically install updates and record log events.

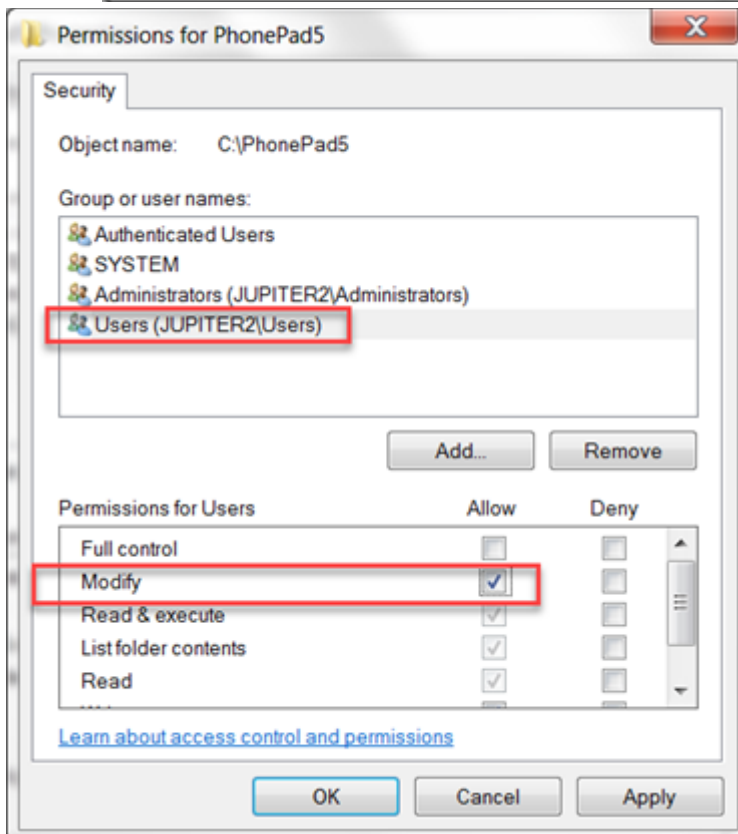
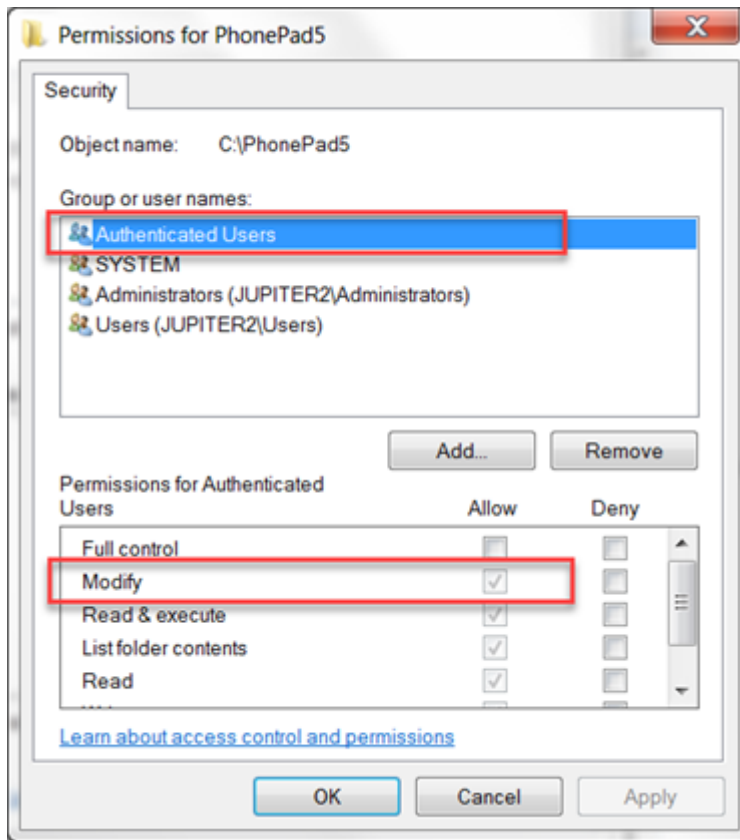
Fortunately this is easily fixed, although you will need to login as a Windows administrator on the workstations getting this error.

What you need to do is set the user permissions to at least **Modify** for the following folders:

- **C:\PhonePad5**
- **C:\ProgramData\Cybercom Software\PhonePad5**

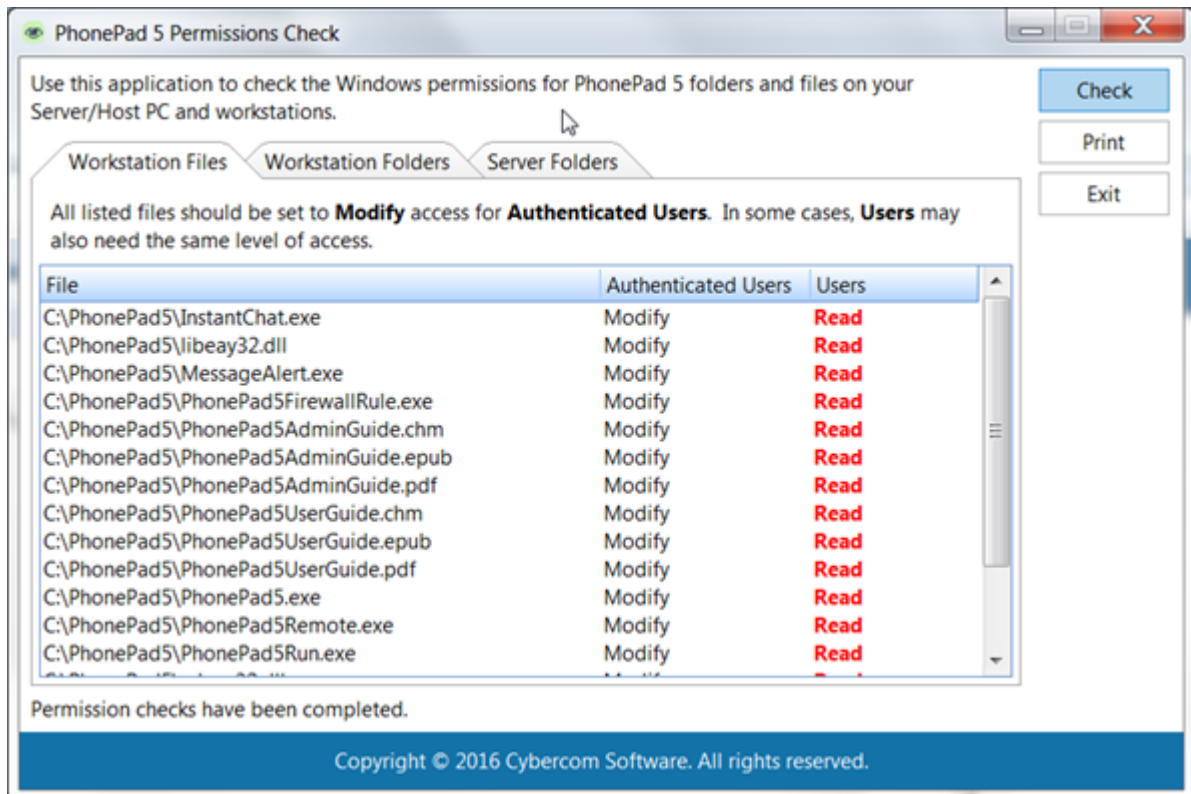
On many computers the **C:\ProgramData** folder is hidden by default by Windows. In that case you may need to type the path in on Windows Explorer's address bar.

These are the permissions that need to be set for both folders:



Checking Windows Permissions

You can easily check to see if your PhonePad folders and files have the correct permissions by downloading and running the **PermissionsCheck** application on your Server or Host PC, and your workstations.



Any potential access rights problems will be show in red.

You can download it here.

Speed Issues

If you're experiencing performance problems with PhonePad 5 then there are a number of things that can cause this

Anti-Virus and Anti-Spyware Software

Anti-virus and anti-spyware can severely impact the performance of PhonePad 5. Read more about this in the section entitled **Anti-Virus, Anti-Spyware and Other Security Software** in the **Other Information** section of the **Admin Guide**.

Network Connectivity

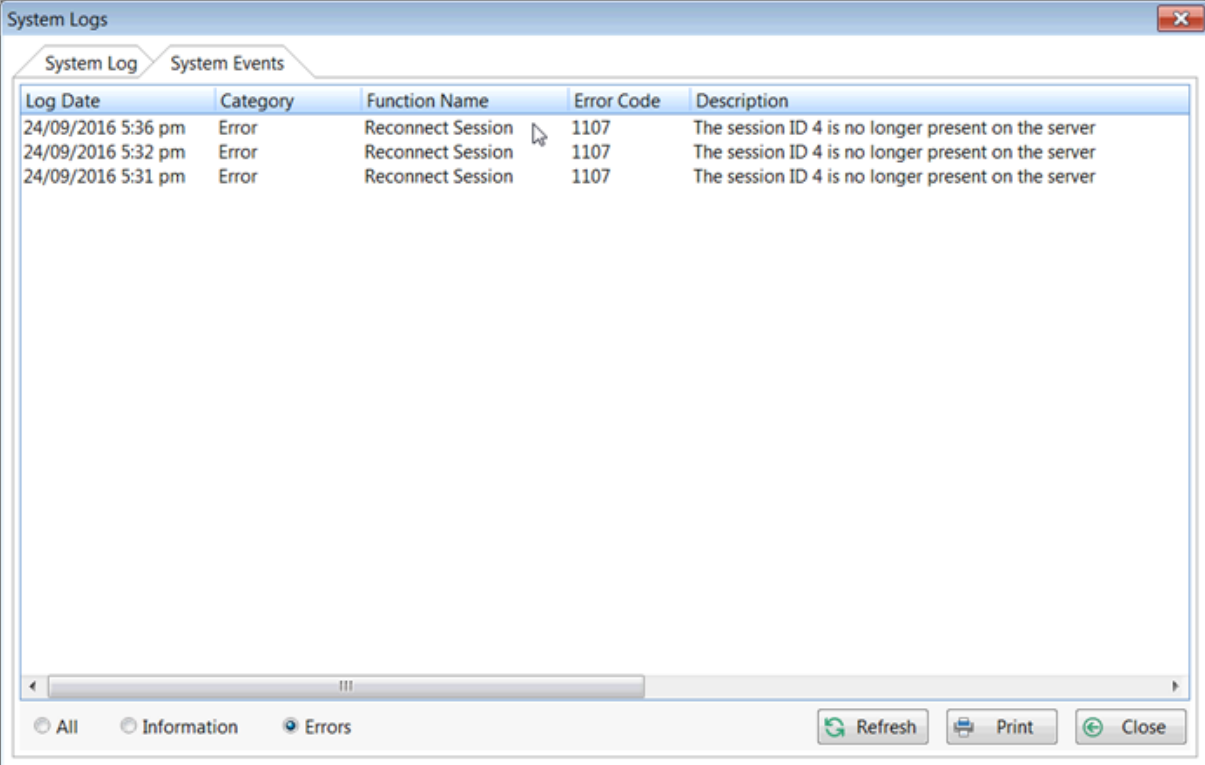
If your network experiences connectivity issues like dropouts, loss of data packets, etc. this can significantly impact performance.

Loss of data packets will cause the data has to be resent, and this will be repeated until the complete packets are received at the other end.

Connectivity drop outs will trigger PhonePad to attempt to re-establish the connection. This takes time. Frequent dropouts will definitely slow things down.

You can check if there have been connection problems:

1. Select **System Logs** from the **System Admin** menu,
2. Click the **System Events** tab.
3. The following example screenshot shows that there were some network problems that caused loss of connection between the workstation and server.



The screenshot shows a window titled "System Logs" with two tabs: "System Log" and "System Events". The "System Log" tab is active, displaying a table of log entries. The table has five columns: "Log Date", "Category", "Function Name", "Error Code", and "Description". There are three entries, all categorized as "Error" and labeled "Reconnect Session" with error code "1107". The descriptions for all three entries are "The session ID 4 is no longer present on the server". At the bottom of the window, there are radio buttons for "All", "Information", and "Errors" (which is selected), and three buttons: "Refresh", "Print", and "Close".

Log Date	Category	Function Name	Error Code	Description
24/09/2016 5:36 pm	Error	Reconnect Session	1107	The session ID 4 is no longer present on the server
24/09/2016 5:32 pm	Error	Reconnect Session	1107	The session ID 4 is no longer present on the server
24/09/2016 5:31 pm	Error	Reconnect Session	1107	The session ID 4 is no longer present on the server

High Network Traffic

If your network is congested with activity this can also affect the speed of PhonePad. While you may be able to open documents over your network without much delay, keep in mind that PhonePad is a networked based data application that can access a lot of data within a short amount of time, so in some way it can be more sensitive to high levels of network traffic.

Heavy Server Load

An overworked Server can definitely affect the performance of any database-based system. A high number of users, high memory usage, and excessive disk activity can all reduce performance.

If you have a Host PC instead of a dedicated server, high amounts of processing on the Host PC can also affect the response time.

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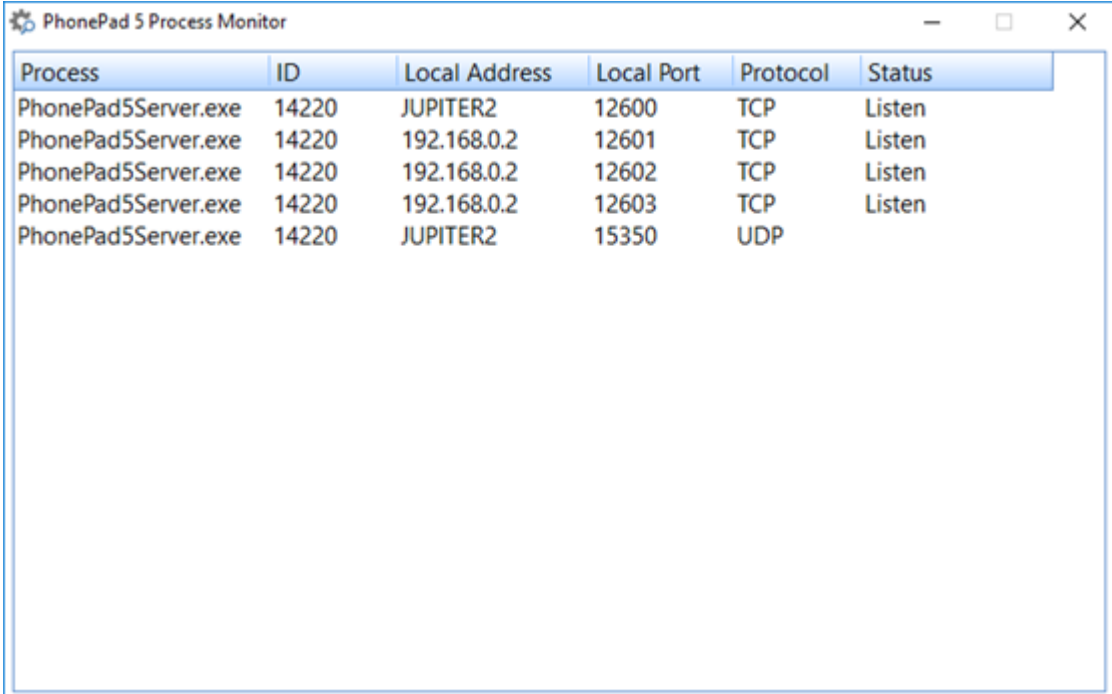
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Connection Issues

Connection Issues

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When PhonePad 5 Server is running you should see similar results. Of course, the process ID and Local Address will be different, but the Local Ports and Protocols should be the same.

If port 12600 is not displayed then there is a problem with the port.

1. **Try stopping and starting the PhonePad 5 Server** using Control Center to see if that resolves it.
2. Check to make sure there are no firewalls blocking the connection.
3. Check your anti-virus/anti-malware/anti-spyware software to see if that is blocking the connection.



Process Monitor can also be started from the Control Center. Just select **PhonePad Server** and then click the **Processes** button.

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Support

Support

We have been supporting our products for over 20 years.

If you have any problems with downloading, installing, configuring or using PhonePad 5 please contact us instead of your normal IT support provider. As good as your IT people are, we know PhonePad better and can probably pinpoint the problem and fix it a lot faster.

Please visit the **Support** page for information on support options: <https://www.cybercom-software.com/support>



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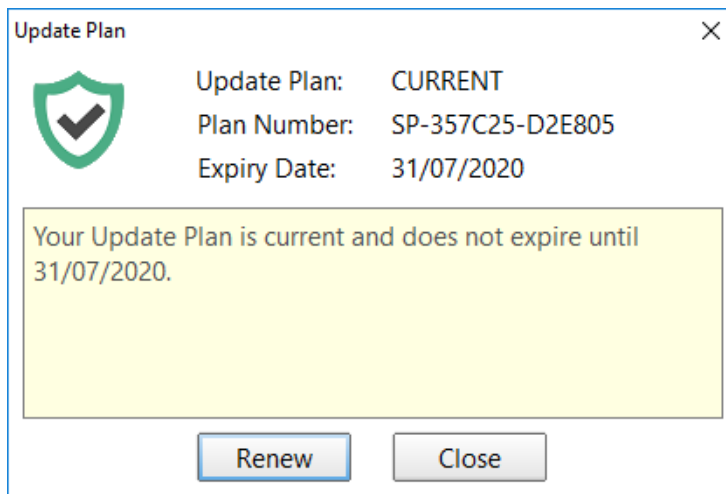
Update Plan

Update Plan

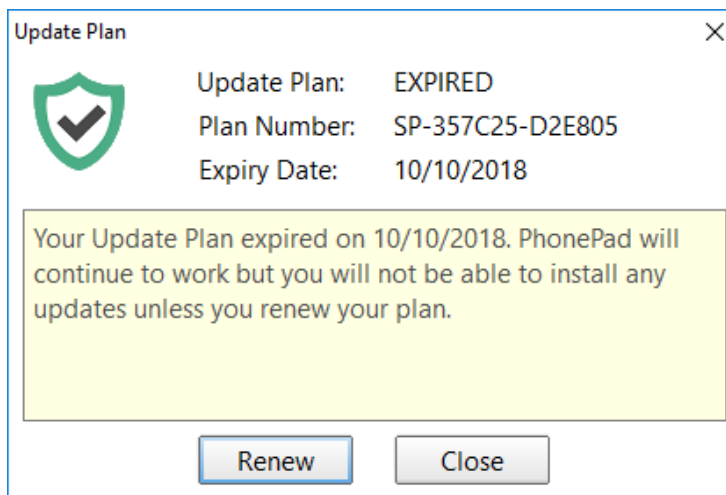
Developing software is a time consuming and expensive business. So that we can continue to develop PhonePad and provide more frequent releases, we have annual Update plans. An Update Plan provides you with all major and minor updates that are release during the period of the Update Plan. A 12 month update plan is provided with your purchase of PhonePad 5. After 12 months you have the option of renewing your update plan. PhonePad will continue to work regardless of whether or not you renew your update plan.

To check your Update Plan, select **Update Plan** from the **Help** menu.

In the first example it shows a current Update Plan that doesn't expire until the date shown.

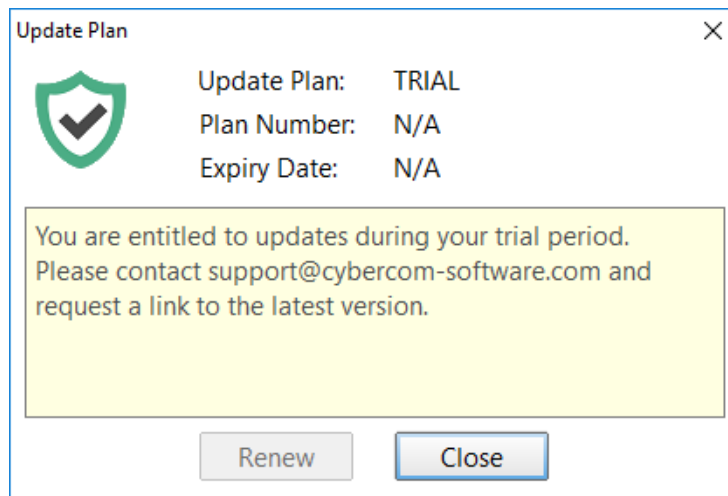


In the next example the Update Plan has expired.



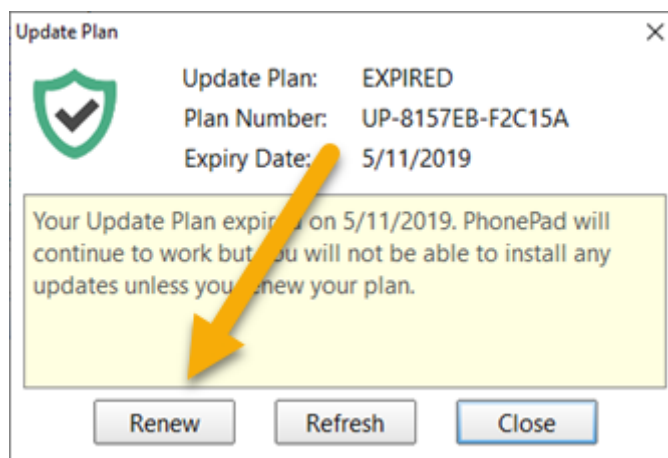
The Update Plan can be renewed at any time, either while your plan is current or when it has expired. If you renew your Update Plan while it is still current you will get a full 12 months added on to the end of your plan's expiry date, so you don't lose anything by renewing early.

If you are in the Trial period you will be on the Trial Update Plan. You are still eligible to updates during this period.



Renewing Your Update Plan

1. When you're ready to renew your Update Plan, click the **Renew** button.



2. The **Update Plan Renewal** window will be displayed.

Update Plan Renewal

Click the **Renew** button to go to the Update Plan Renewal website. If you have already renewed then enter your **Update Plan Number** and click the **Activate** button.

Client Number: C846269

Serial Number: P5-1234-5678-9012-3456

Update Plan Number: UP-56C797-87BDE4

Buttons: Renew, Activate, Close, Help

3. Click the **Renew** button on this screen. You will be taken to the Update Plan Renewal website.



Update Plan Renewal

Renew your Update Plan today for another 12 months and continue to receive major updates and minor updates.

Client Number: C846269
Company: Fluffy Rabbit Corporation
Serial Number: P5-1234-5678-9012-3456
No of Users: 5
Price: \$29.00

[Renew Now](#)

Your IP Address is 124.180.203.185



Safe and secure online ordering



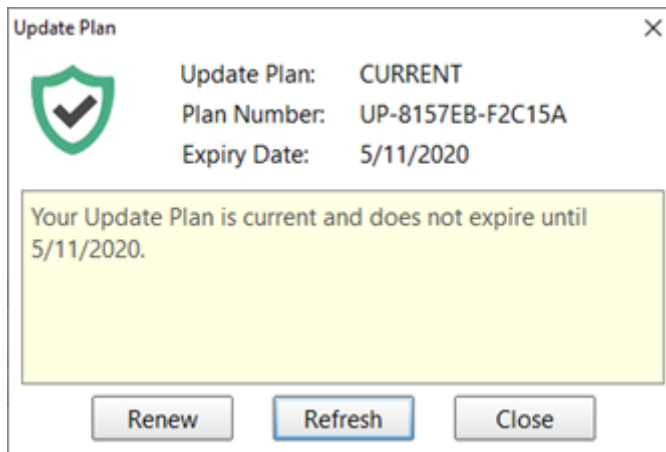
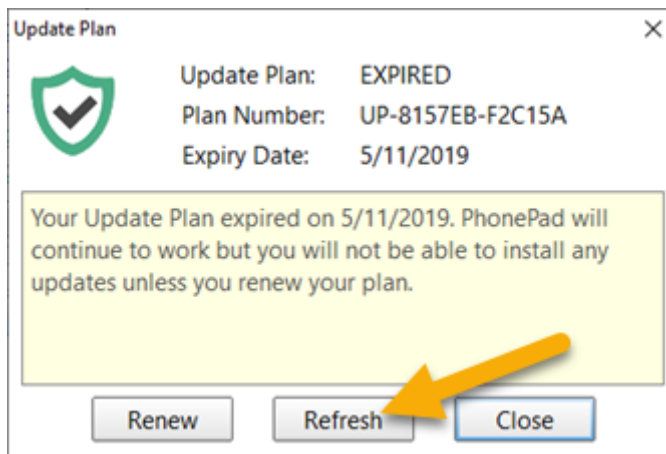
NOTE: Prices shown are in US dollars.

4. Your details will be automatically filled in and the renewal amount for 12 months will be calculated.
5. Click the **Renew Now** button to pay for the renewal and follow the prompts.
6. Once your payment has been processed you will receive an email containing your **Update Plan Number**.

7. Enter the **Update Plan Number** and click the **Activate** button. PhonePad will be updated with the new Update Plan.

Refreshing Your Update Plan

If you have renewed your Update Plan and haven't received an email from us, or you believe your Update Plan details aren't correct, you can click the **Refresh** button to retrieve your Update Plan details from our system and update your PhonePad database.



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