UPGRADE INSTRUCTIONS FOR PHONEPAD 4.12

INTRODUCTION

PhonePad 4.12 has new features that require some changes to your PhonePad installation.

If you are upgrading from a previous version of PhonePad, please follow these upgrade instructions.

If you are installing PhonePad for the first time then you can ignore these instructions.

STEP 1 – INSTALL THE NEW VERSION

The first step is to install the new version of PhonePad over the existing version. Please make a backup of your existing version first, including both application files and your PhonePad database, in case something goes wrong and you need to back out the changes.

STEP 2 – UPGRADE YOUR PHONEPAD DATABASE

There have been a few structural changes to the PhonePad database with this release so it's important that you upgrade your existing data.

This is done by running the **DBUpdate** wizard and following the instructions. Please note that you only need to do this once. You **<u>don't</u>** need to run this from each workstation.



STEP 3 – RUN THE CREATE CALLER LOOKUP UTILITY

To support the new features in 4.12, you need to migrate some of your Address Book data. This is done by running the included **CreateCallerLookup** utility. The utility will be located in your PhonePad folder (the same folder as PhonePad) but you will need to copy or move it to your PhonePad **data** folder (the folder your PhonePad database is located in).

😂 Create Caller Lookup	- • 💌
Information This utility is used to populate the new Caller Lookup feature (used in PhonePad Version 4.12 and later) with caller information.	Update Exit
Requirements If you are upgrading from a version <u>prior to Version 4.12</u> then you <u>must</u> run this utility, otherwise you will be unable to look up caller information when creating phone messages. If PhonePad 4.12 (or later) is your first installation then you do not need to run this utility.	
Using this Program Click the Update button to start the update process. Once this utility has been run you will not need to run it again.	
IMPORTANT : This utility must be located in your PhonePad data folder (not the application folder).	S
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NEW FEATURES AND CHANGES IN PHONEPAD 4.12

Enhanced Address Book

The Address Book has some improvements to the Address List:

- The Address Book window now loads faster, even with very large Address Books. In the screenshot below there are over 10,000 contacts in the Address Book but the window loads in 0.2 seconds.
- Most of the columns can be sorted in ascending and descending order
- The incremental search facility has been expanded to allow you to search any of the fields displayed in the Address Book list.

Name	FirstName	LastName	From 🔺	Lose
Aaron Burgess			Bates Corporation	Jahn Add
Aaron Coffey			Hale and Sons	- 200
Aaron Contreras			Berg LLC	abil Edit
Aaron Conway			Hardin Inc	
Aaron Dale			Odonnell Company	- <u>D</u> elete
Aaron David			Albert Pty Ltd	
Aaron Harris			Luna Corp	🎯 <u>P</u> rint
Aaron Miranda			Wall Co	D lund
Aaron Wilder			Dillon Corp	Cimport
Abby Cain			Whitfield Corp	Export
Abby Guy			Rowe Corporation	0 Engen
Abby Huffman			Claytons Limited	🧳 Clear
Abby Shaw			Cruz Limited	
Abby Webb			Mcmahon Corp	Dptions
Abby Woodard			Villarreal Enterprises	
Abigail Griffith			Combs Company 🚽	🔊 Helb
•]	•	
Search for:		in this column	Name 👻	

Enhanced Caller Lookup

- Very large Address Books can cause the phone message form to load very slowly. We have optimized the code to load the form faster if you have a large Address Book. With over 10,000 entries in the Address Book we improved the speed from a ridiculous 45 seconds down to a reasonable 2.4 seconds. Hopefully you don't have that many entries in your Address Book.
- The drop-down list for selecting a caller now includes their organization in addition to their name. This makes it easier to identify a caller where there are multiple callers with the same name.

New	Message		- • 💌
Ж Р	n Arial		
	While Y	ou Were Out	🗭 Send
To:	Damian,	Date: 18/05/2009	Cancel
Caller: From:	john John Castro John Chang John Crane	Time: 7:47:00 PM Lyons and Associates Delaney Limited Odornel Enterprises	₩ <u>H</u> elp
C Endr Endr Cam Urge Subject	John Flynn John Hendricks John Jackson John Macias John Mathis John Mclaughlin John Newman	Wolfe Company Parker and Associates Lang and Associates Stein Enterprises Morrison LLC Coffey Limited Bryan Inc	*
Message	3:		
			*
Taken b	y: Steve		

In-Out Board "Back At" Time

The In-Out Board can now accept blank "Back At" times.

Improved Archiving Options

PhonePad Admin now has two options for archiving messages. You can either archive messages only where they have been deleted by users, or you can archive messages regardless of whether users have deleted them or not.

Archive Messages	×
This option moves messages from the main message table to an archive. Only archive messages that have been deleted from Inboxes, Sent Folders and all other folders Archive messages and remove from Inboxes, etc.	Archive Cancel
Archive all messages prior to: 1/01/2009	
Ready.	

IMPORTANT NEW SETTINGS UNDER PREFERENCES

In line with some of the changes, new settings have been added to **Preferences** to further customize and improve performance if required. If you are experiencing performance issues then try disabling some of these options.

- **Load Caller Details** Works the same as before. If checked, the caller drop-down list will contain all names (and now organizations as well) in your Address Book.
- **Load From Details** Functions the same as Load Caller Details. Uncheck this option if you are experiencing slow load times when creating new phone messages.
- **Sort Caller List** If checked, all caller names in the Caller drop-down list will appear in alphabetical order.
- **Sort From List** If checked, all caller names in the From drop-down list will appear in alphabetical order.

Preferences		×
wesseles. 4	Address Book	🗸 ОК
Followup	Adding and Updating Default Entry Permissions	Cancel
Security	Prompt when adding callers Updateable by other users Update Address Book	 Apply Help
	Prompt when updating callers	
Address Book	Phone Number Updating	
3 5	 Automatically update field: Telephone 	
Dates and Times	Prompt field to update	
<i>1</i>	Address Book List	
Dialing Setup ≡ Ø Time Zones	Buffer Address Book List Warning: If you have thousands of Address Book entries, disabling this option could significantly slow down loading of the Address Book.	
	Show ALL tab	
In-Out Board		

- **Buffer Address Book List** By default, the Address Book list is buffered, which means only a portion of entries are loaded into the list at a time. This improves the load time for the Address Book window. Unless you have a large Address Book you can disable this option. When disabled you can use the scroll bar's thumb button to scroll through the list in real time.
- **Show ALL Tab** If you have a large Address Book then having the ALL tab displayed can slow things down if you click on the tab. You can hide the ALL tab by unchecking this option so you don't accidentally click the tab.
- **Show Lines** This has no effect on performance but can make the Address Book list easier to view.