
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.

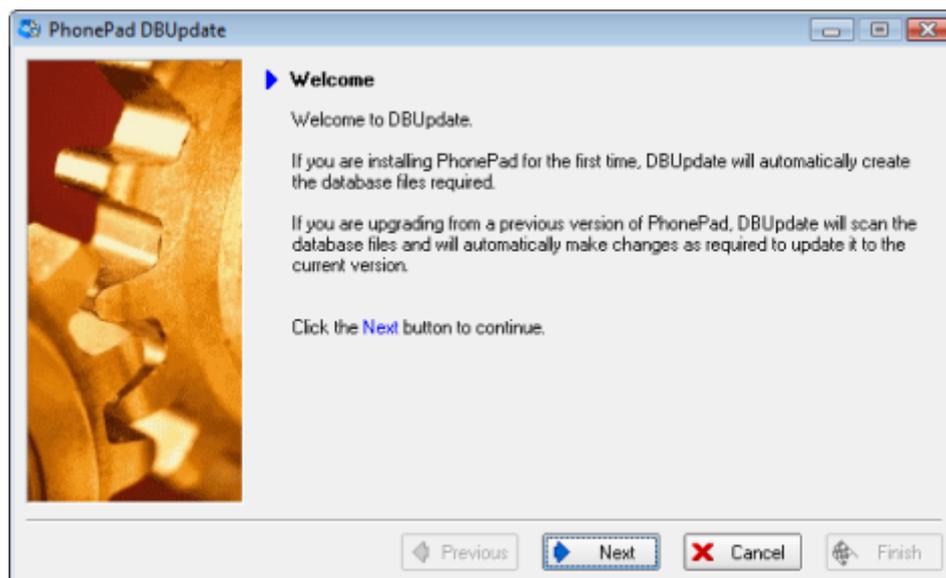
STEP 1 – INSTALL THE NEW VERSION

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

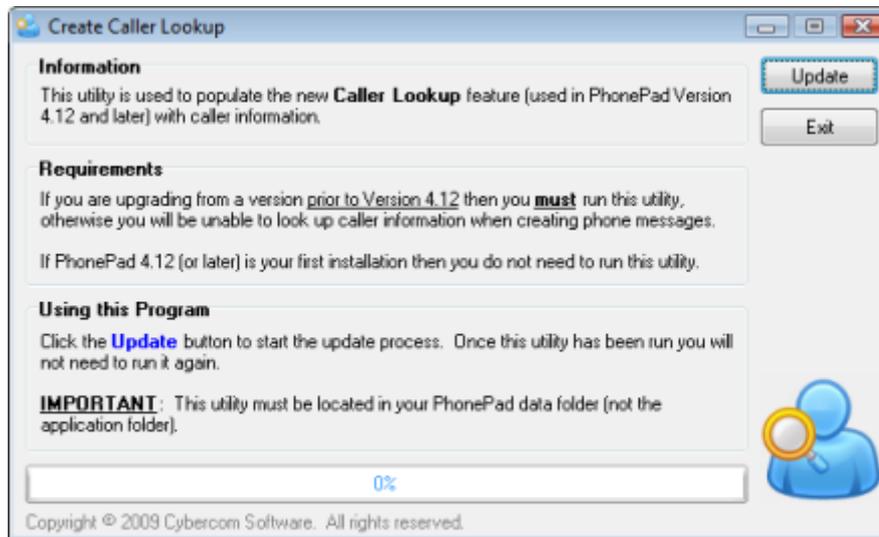
There have been a few structural changes to the PhonePad database with this release so it's important that you upgrade your existing data.

This is done by running the **DBUpdate** wizard and following the instructions. Please note that you only need to do this once. You **don't** 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).

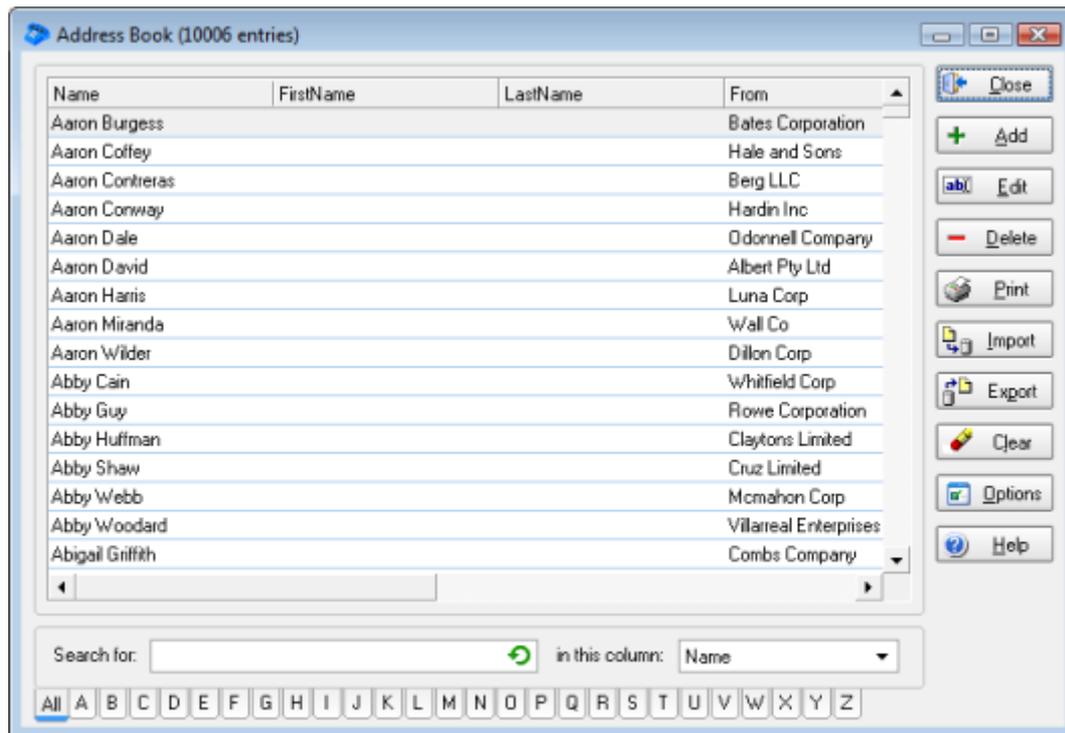


NEW FEATURES AND CHANGES IN PHONEPAD 4.12

Enhanced Address Book

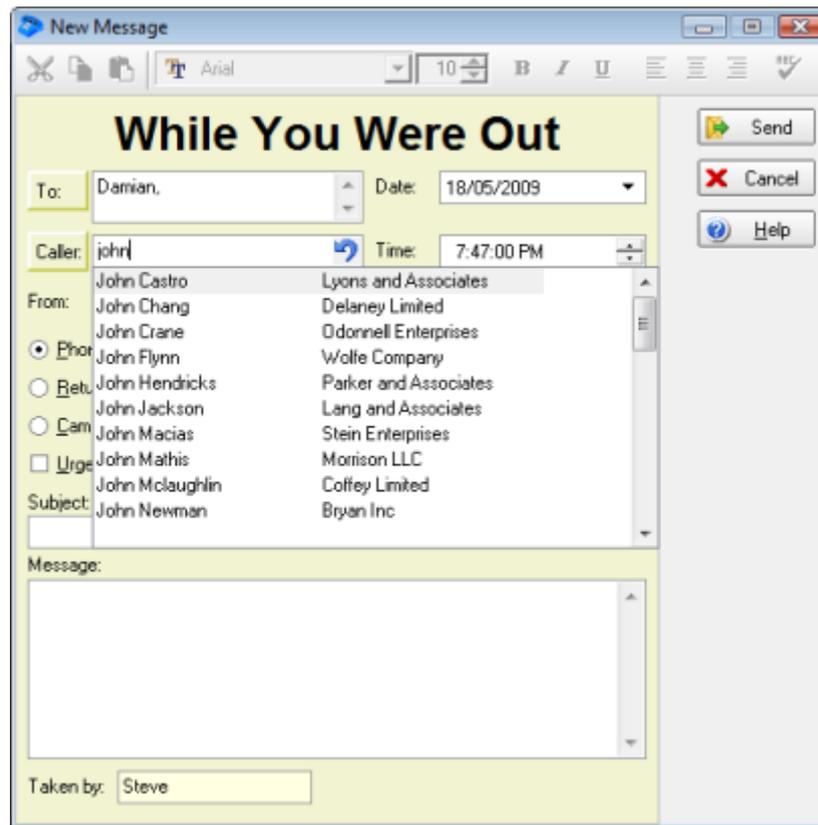
The Address Book has some improvements to the Address List:

- 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.



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.



In-Out Board “Back At” Time

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

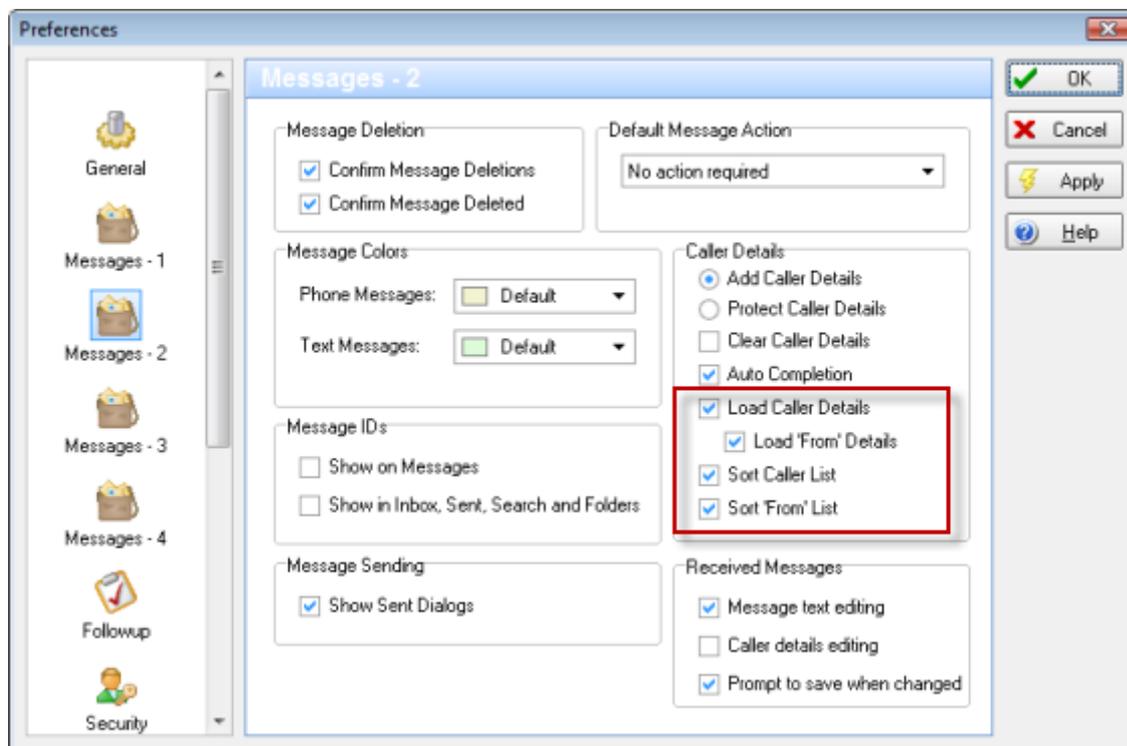
Improved Archiving Options

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.

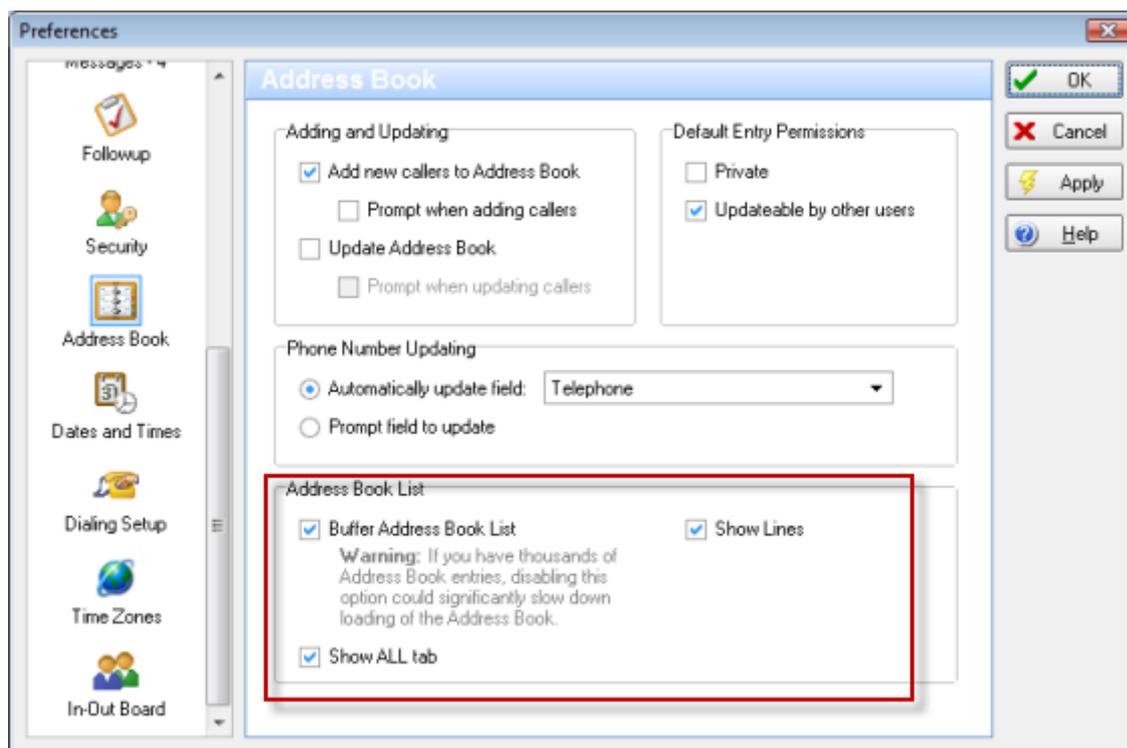


IMPORTANT NEW SETTINGS UNDER PREFERENCES

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.



- **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.