PhonePad 5
User Guide



Contents

Everyday work

Start using PhonePad 3
Take a phone message 4
Record outgoing calls and send short messages 6
Read and act on messages 10
Find messages and organize them into folders 12
Track callbacks and follow-ups 15
Manage the Address Book 17

Preferences and add-ons

Set availability and route messages 21
Customize the workstation 22
Use the To Do List 23
Use Appointment Calendar and PhonePad Chat 24

Troubleshooting and support

Resolve startup and connection problems 25
Find help and account information 27

Start using PhonePad

PhonePad 5 gives your office a shared record of phone calls and messages. Use it to record who called, get the details to the right person, and track what happened afterward. Your workstation connects to a PhonePad 5 Server, and your administrator controls which users, folders, and features you can access.

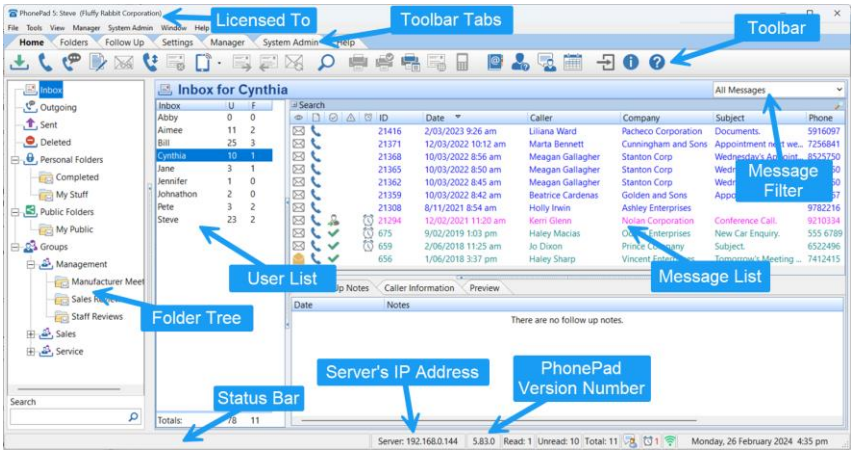
Open PhonePad and sign in

1. Double-click the **PhonePad 5** shortcut. PhonePad looks for a server on your network and checks for workstation updates during startup.
2. If the trial screen appears, choose **Continue Trial**. The screen shows the time remaining and offers purchase, licensing, or extension options when available.
3. Enter the username and password supplied by your administrator, then click **OK**. The password is case-sensitive. Hold the eye button to check what you typed.
4. If you forgot the password, use **I forgot my password** if your administrator enabled recovery. Otherwise, ask your administrator for assistance.

Find your way around

Select a user in the user list to switch to an inbox you have permission to open. Select a folder in the folder tree to change what appears in the message list. Select a message to use the preview and information panes. Use the **Home** tab for everyday message actions, **Folders** to organize messages, and **Follow Up** to track work that needs a response.

If a coworker can see a button that you cannot, check your interface mode under **View**. Your administrator may also limit access to the feature.

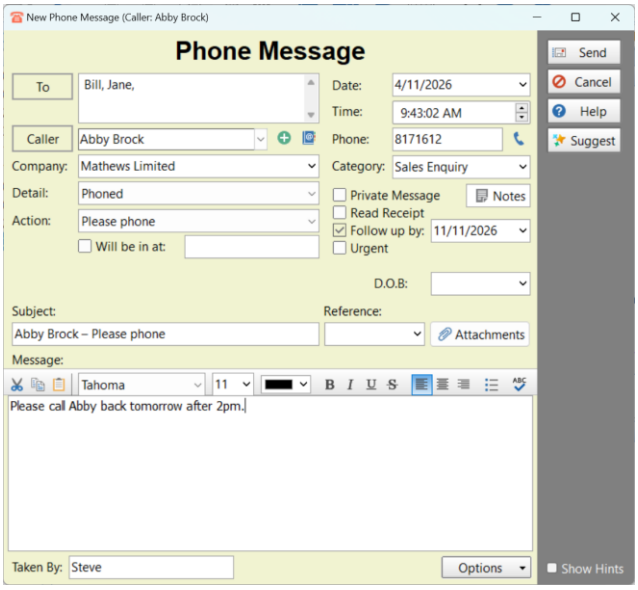


The PhonePad window brings together the toolbar, folders, users, and message list.

Take a phone message

Record an incoming call

1. Click **New Phone Message** or press **Shift+Insert**.
2. In **To**, start typing the recipient's name. Select the match and press **Enter**. Add other recipients as needed, or click **To** to browse users and groups.
3. Type the caller's name in **Caller** and choose a match. To search more fields and check the caller's details, click **Caller**, enter search text, then select the correct result.
4. Confirm the callback number. Enter a concise **Subject** and put the details in **Message**. Check the date and time if you are recording a call that came in earlier.
5. Set the applicable urgency, privacy, or follow-up options. Add any supporting files through **Attachments**.
6. Review the recipients and callback details, then click **Send**.



The incoming phone message form.

Address messages to groups and external users

A recipient beginning with **#** is a group. Use the **Groups** tab in the recipient picker to see its membership. A name beginning with **@** is an external user. PhonePad queues delivery to that recipient through the configured channels, such as email, SMS, or Pushover.

Add or correct a caller during the call

If the caller does not appear, enter the name, company if applicable, and phone number, or use **Add** beside the **Caller** field to open the full contact form. If a contact is already on file, check the lookup details before creating another entry. Use the caller edit option to correct the saved contact.

Choose call details and options

Use **Details** to record why the person called and **Action** to tell the recipient what to do. Your organization can customize both lists. **Will be in at** provides a field for extra information, such as when the caller can be reached. Choose a **Category** if your administrator has configured categories.

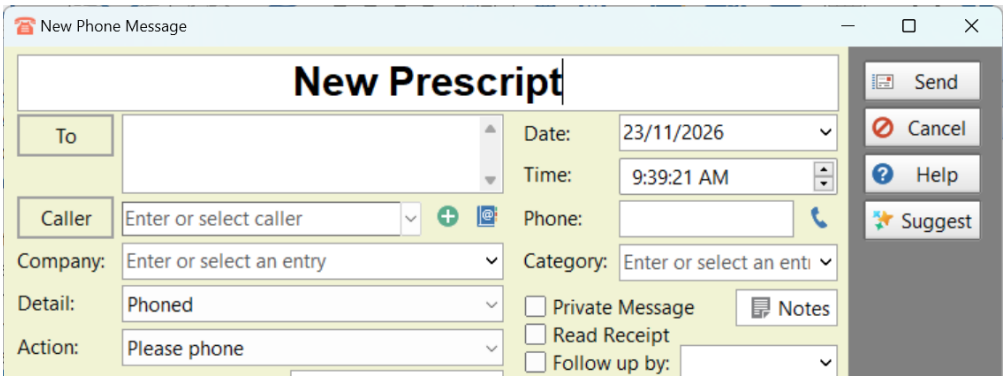
Use **Reference** for an identifier such as a client or file number. PhonePad remembers entries in this field and makes them available in the dropdown to other users.

Choose **Private** to limit viewing to the sender and recipients. Select **Read Receipt** to receive a receipt when a recipient reads the message, **Urgent** to flag it, or **Follow Up By** and a date to create a reminder.

Use **Options** at the bottom of the form to insert a date/time stamp with your username or add a separator above or below the current line. Set the separator character and length under **View > Preferences > Messages-3**.

Change the title of one phone message

While composing a phone message, if you double-click the large heading at the top of the form you can change the title for this message. This overrides the default Title set in the Label Editor for this message only. The Subject field is separate.



Review the message before sending

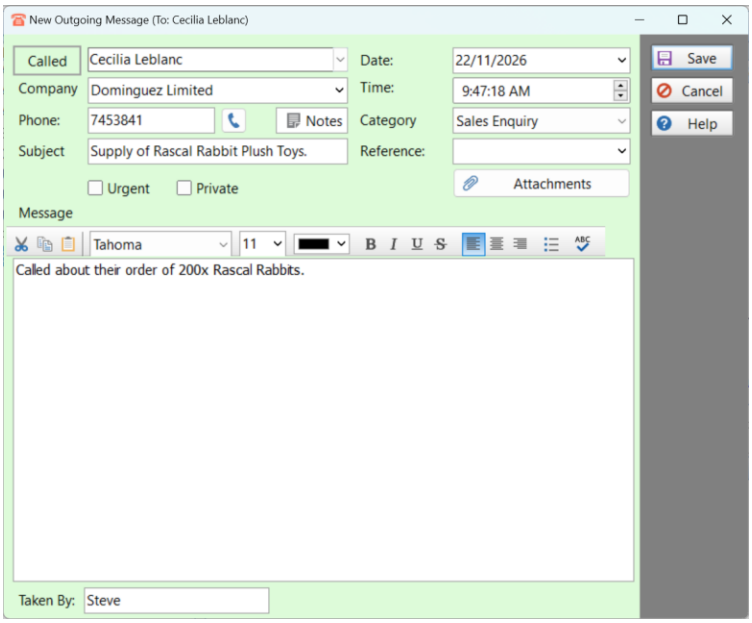
Use **Spell Check** on the message toolbar or review the live spelling marks. Where available, **Suggest** can fill empty fields from message text, including possible follow-up dates and phone numbers. Review each suggested value against the call details. **Auto Suggest** enables automatic suggestions in Preferences.

Use **Attachments** to add, view, or remove files. A message can have up to five attachments. The badge on the button shows how many are attached.

Record outgoing calls and send short messages

Log an outgoing call

1. Click **New Outgoing Call** or press **Ctrl+Insert**.
2. Select or enter the contact and phone number. Check the date and time, then record the purpose and outcome of the call.
3. Click **Save**. The record goes to the **Outgoing** folder.

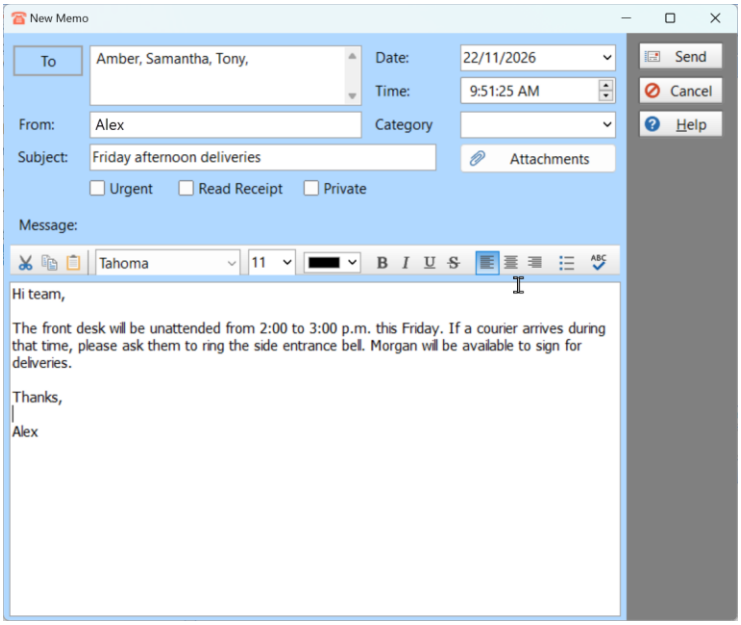


Save the details of an outgoing call for later reference.

Send an internal text message

1. Click **New Text Message** or press **Alt+Insert**.

2. Choose the recipients and enter the subject and message. Add any applicable options or attachments.
3. Click **Send**. Review the result in **Sent**.



Use an integrated phone or external delivery

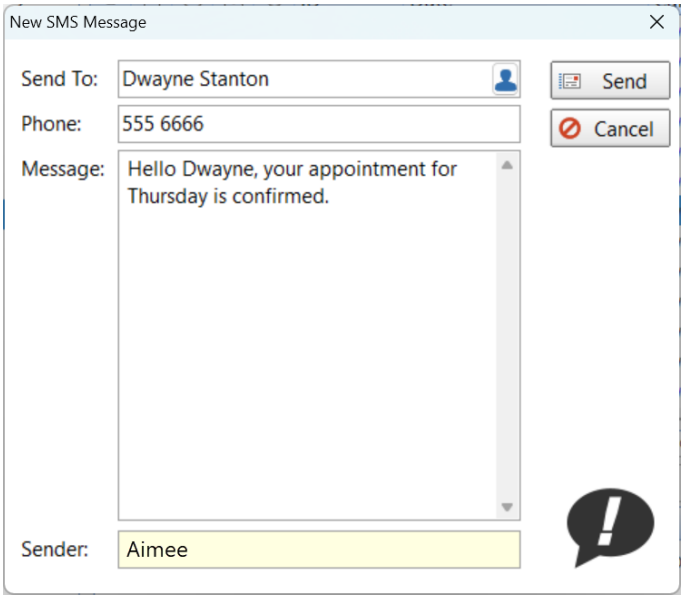
With TAPI configured, select a phone message in the **Inbox** and choose **Dial Number** from the toolbar or **File**. Pick one of the caller's numbers and click **Call**. In **Received Calls**, select a call, click **Dial**, then **Call**.

On a workstation using CallerID.com integration, the incoming call window shows the number and any matching Address Book details. Click **Take a Message** to open a phone message with the caller details filled in.

For direct SMS or Pushover delivery, use the relevant PhonePad command when your office has configured that service. Internal PhonePad text messages and SMS delivery are separate workflows.

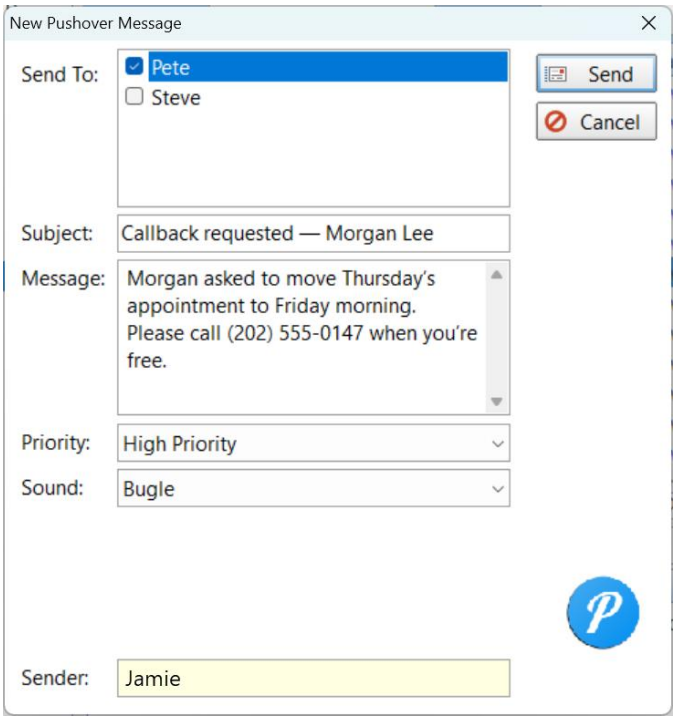
Send a direct SMS

Open **SMS Messages** and click **New**. Click the lookup button beside **Send To**, search your Address Book, select the recipient, and click **OK**. Enter the message and click **Send**. Check the sent list afterward. This option requires an SMS service configured by your administrator.



Send or schedule a Pushover message

Open **Pushover Messages**, click **New**, and select one or more users. Enter the message and an optional subject. Choose a priority and sound if needed. To send later, enable **Scheduled Sending** and enter the date and time. Click **Send**, then check the **Scheduled** or sent list as appropriate. Select a pending item and use **Edit** to change it.



Read and act on messages

Open a message and check its details

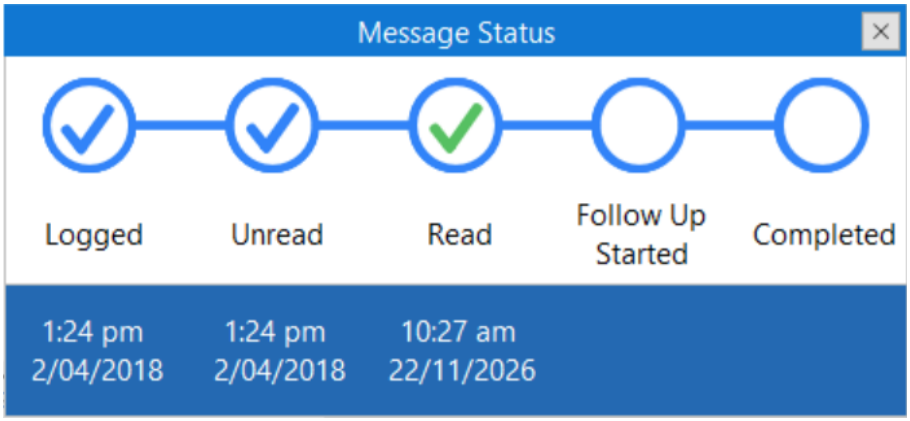
Select a message to read the preview, or double-click it to open the full record. The **Caller Information** pane can show callback numbers for the selected message. Turn it on through **View** if you need to see it. Use the message's attachment list to open available files.

Message receipts show status for PhonePad phone and text messages. Open a receipt from the list as you would a message. If your office uses email delivery, the list can also include email replies, read receipts, or delivery failures. Open the corresponding entry to see its details.

Check a message’s status

In the Inbox, select a message. Hold down Shift and click the same message again to open the Message Status window.

The timeline shows when the message was logged, when it entered the Inbox as unread, when it was read, and when follow-up started or was completed. Check marks show the stages reached. The dates and times appear below. An empty circle marks a stage it has yet to reach.



Review the history of a message

Open a phone, text, or outgoing message. Click **History** at the bottom of the window, then click **Refresh** to load the history. Double-click an entry to open it. For all calls and follow-up notes involving a caller, use **CallFlow**.

Edit a sent or received message

Open the message. If your administrator has enabled editing and the message can be changed, the title bar displays **EDIT MODE**. Update the available fields, close the message, and confirm that you want to save the changes.

Reply, forward, or move responsibility

Action	When to use it
Reply	Respond to the sender. Select the message and click **Reply** on **Home**.
Forward	Send the message to another PhonePad user. Select it and click **Forward** on **Home**, then review the recipients.
Email Message	Send the selected message to configured email recipients or an address you enter. This depends on your office's email setup.
Reassign	Move a received message to another user's inbox when you have access. Hold **Alt** and drag the selected message onto their name in the user list.
Resend	Use the resend action when you need to send a previously sent message again. Check the recipients before sending.

Print a message or a folder list

Select one or more messages and choose **Print Messages** to select a report layout. Available layouts include one message per line, one message per page with follow-up notes, and message forms with two or four messages per page. Use a larger layout for long messages.

Choose **Quick Print** on **Home** or **File** for a separate preview and print format for the selected messages.

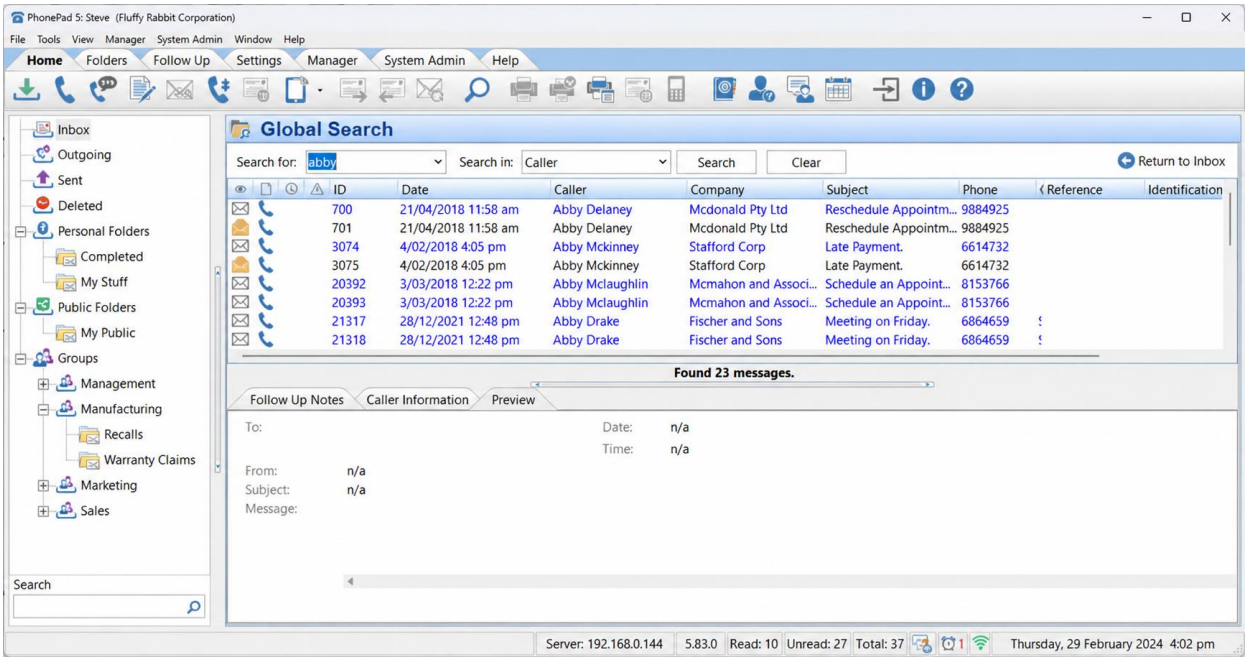
Select the messages you need and use the print commands on **Home** or **File**. Use **Print Message List** for a compact list of the current folder with read and follow-up status. Use the message print option when you need the contents of the selected messages.

Find messages and organize them into folders

Search a folder or search the archive

Open the search bar with the **+** at the top of the current message list. Enter your text, choose the field, and click **Search**. Click **Cancel** in the search bar to restore the full list.

For messages across folders, including archived messages, press **F3** or use **Search** on **Home**. In **Search for**, enter text, then select a field under **Search in**. Search by caller, company, phone number, subject, or message text. Use **Return to Inbox** when finished.



Global Search can find messages across folders and the archive.

Filter your inbox

Use the **Message Filter** or **File > Inbox Filtering** to show only the messages you want. The unread, read, and total counts on the status bar provide quick filters. In **Preferences > Messages-4**, enable **Filter Messages** and choose a filter if you want PhonePad to apply it at startup.

Choose a folder

Folder	What it contains
Inbox	Messages received for the selected user or group.

Folder	What it contains
Outgoing	Records of phone calls your office made.
Sent	Messages you sent through PhonePad.
Deleted	Deleted messages that can still be restored before automatic removal.
Personal folders	Folders you create for your own filing.
Public folders	Folders shared across users who have access.
Group folders	Folders available to the relevant group.

Create a folder or subfolder

Use **Personal Folders** for your own filing, **Group Folders** for a team, or **Public Folders** when the messages should be available more widely. Folder access depends on your permissions.

For a personal or public folder, right-click **Personal Folders** or **Public Folders** in the Folder Tree and choose **Add Folder**. Enter a folder name and click **OK**.

For a group folder, right-click **Group Folders** and choose **Add Folder**. Select the group, enter a **Folder Name** and an optional **Description**, then click **OK**.

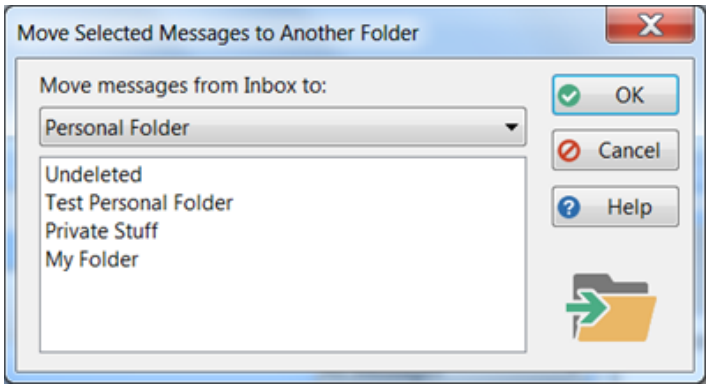
To create a subfolder, select the existing folder that will contain it. Choose **Folders > Add New Folder**, check the **Parent Folder Name**, enter the subfolder name, and click **OK**.

Move messages into a folder

Open the folder that currently contains the messages and select one or more messages in the list. On the **Folders** toolbar, click **Move Messages to Folder**. You can also right-click the selection and choose **Move to Folder**.

Choose the destination type. For **Personal Folder**, **Public Folder**, or **Group Folder**, select the specific destination folder and click **OK**. Open the destination in the Folder Tree to check that the messages are there.

To drag messages instead, hold **Alt** and the left mouse button, drag the selected messages onto the destination in the Folder Tree, then release the mouse button.



Choose the folder type and the specific destination before you click OK.

Delete and restore messages

Check which folder is selected before using commands that empty or delete it. Shared folder changes may affect coworkers.

To delete a message, select it and click **Delete** on **Home**, choose **File > Delete Message**, or press **Delete**. Confirm the deletion. The message moves to **Deleted**.

To restore a deleted message, open **Deleted**, select it, and choose **Undelete Messages**, then confirm. Messages are, by default, automatically removed after 14 days in **Deleted.** Your PhonePad administrator may have changed this.

Find and rearrange folders

Enter a folder name or part of it in the search field at the bottom of the folder tree. Click the search button to select a match. Click again to move to the next match.

When a personal or public folder is open, the **Folder Navigation Bar** shows its path. Click an earlier folder in the path to move up the hierarchy.

To move a personal or public folder, hold **Alt** and drag the folder itself onto the destination. You can also right-click a personal folder and choose **Change to Public Folder**, or right-click a public folder and choose **Change to Personal Folder**, where permissions allow. Check who should have access before changing the folder type.

Work from a shared inbox

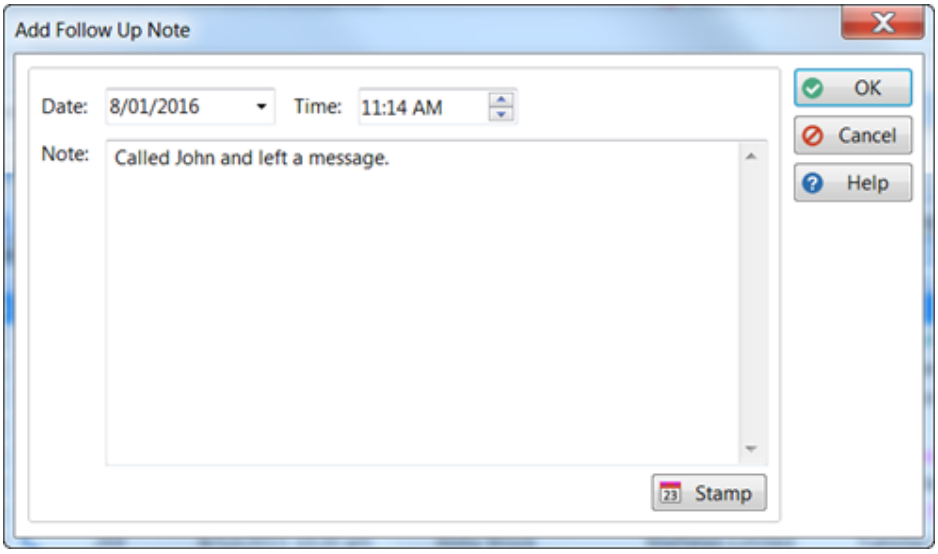
Select the relevant user or group in the user list. Group inbox names begin with **#**. If a shared inbox is missing, ask your administrator to check your access or group membership. For a handoff, record what you did as a follow-up note so the next person can pick up the work.

Track callbacks and follow-ups

Flag a message and record progress

1. Select the message and choose **Mark for Follow Up** on the **Follow Up** tab. Recipients of the same message can also see the follow-up flag on their copies.
2. Choose **Add a Follow Up Note**. Check the date and time, record what happened or what needs to happen next, then click **OK**.
3. Open the note from the **Follow Up Notes** area when you need to review it. You can edit notes you created. Notes from other users are available for viewing.

After you complete the work, select the message and choose **Mark Follow Up as Completed** on **Follow Up**. Other recipients of the same message see the completed status.



Use a follow-up note to record a callback or handoff.

To clear a flag without recording completion, select the flagged message and use **Mark for Follow Up** again. This also clears the flag for other recipients.

To remove a note you created, select it in **Follow Up Notes**, choose **Delete a Follow Up Note**, and confirm. To print all notes for the selected message, right-click the notes area and choose **Print Follow Up Notes**.

Set and review a reminder

Select the message and choose **Add Reminder** on the **Follow Up** tab or the message context menu. Set the date and time, check **Enabled**, and select the alert option if you want a notification when it is due.

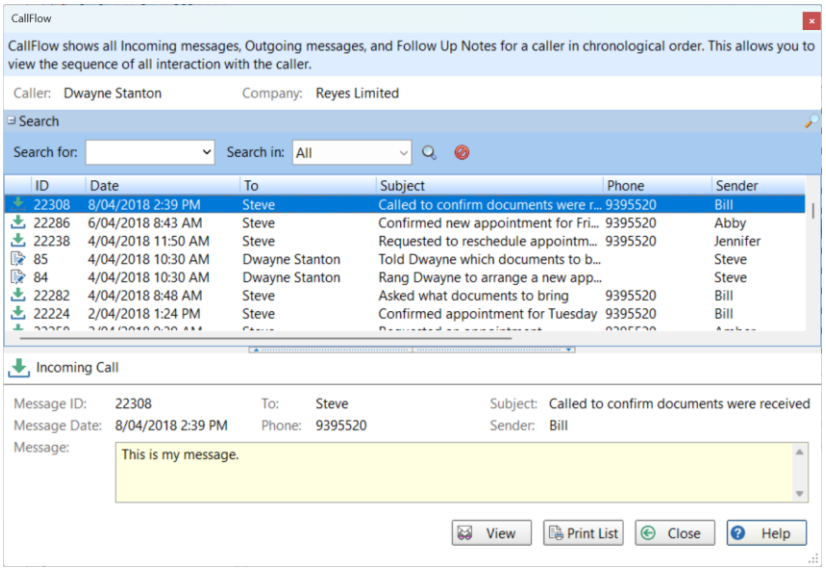
Use the reminder icon or **View Reminders** to review due and overdue work. Use **Manage Reminders** to review or adjust existing reminders. Set how reminder alerts appear in **Preferences > Reminders**.

To edit a reminder, select the message, choose **Manage Reminders** on **Follow Up**, select the reminder, and click **Edit**. Adjust its date, time, enabled state, or alert setting.

Review earlier calls or changes

Use caller history to review prior activity for a contact. Use message history where available to review changes to a message. Sites with CallerID.com hardware can open **Call History** from **Follow Up** or **View** to review incoming calls and, with supported hardware, outgoing calls. The history includes answered and unanswered calls.

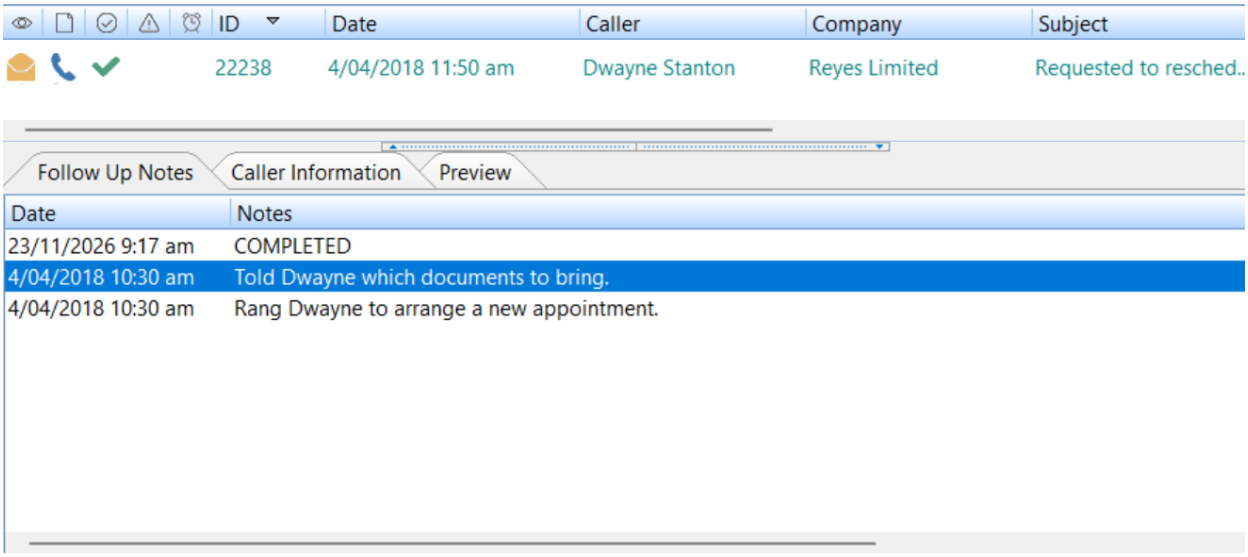
Use **CallFlow** to review incoming calls, outgoing calls, and follow-up notes together for a caller. Select a message and click **View** to open it, or choose **Print List** to print the history.



In **Call History**, use the history list for individual calls or the graph for a visual timeline. Incoming calls appear in blue and outgoing calls in orange where supported. Drag the chart left or right to review other dates.

Work through a callback

Suppose a client asks for an update by Friday. Create a phone message for the person handling the request, select **Follow Up By**, and choose Friday. When the reminder comes due, open the original message and return the call. Add a follow-up note that records what you told the client and any commitment you made. If the callback resolves the request, mark the follow-up complete and use **Move Messages to Folder** to file the message in the appropriate client or team folder.

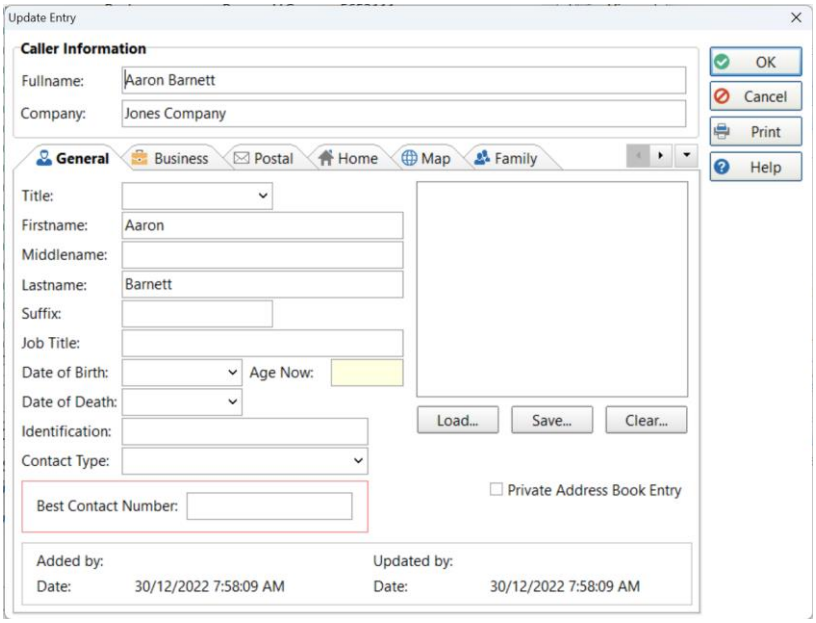


Manage the Address Book

Add or update a contact

1. Open the **Address Book** and search for the contact first. Select an existing entry to view or edit it, or click **Add** to create one.
2. Enter **Fullname**. PhonePad splits it into **Firstname**, **Middlename**, and **Lastname**. Review those fields and correct them where needed.
3. Fill in the relevant tabs, such as **Business**, **Postal**, or **Home**. Set **Best Contact Number** if the caller has several numbers. Use **Identification** for a reference such as a client number.
4. Select **Private Entry** if only you should see the contact. Click **OK** to save.

The available tabs and contact types depend on your administrator's configuration. Use **Notes** for contact-specific information. Where available, use **Map** to load a business, postal, or home address after entering it.



The contact form separates name information from addresses, notes, and documents.

Store addresses and other contact details

Use **Business**, **Postal**, and **Home** to keep different addresses and phone numbers for the same contact. Enter a job title or company when it helps identify the caller. If the contact has several phone numbers, use **Best Contact Number** to identify the preferred one.

On **General**, use **Contact Type** to classify the contact if your administrator has set up types, and **Identification** for a client, patient, or other reference number. Enter a **Date of Birth** if you need it. PhonePad calculates **Age Now** from that date.

Use **Load**, **Save**, or **Clear** in the photo controls to add, export, or remove a contact photo. If your office uses the **Family** tab, you can record a spouse's contact details and family dates of birth. Use **Notes** for information that should stay with the contact across calls. Your administrator can configure the available tabs, including the names and colors of the Notes tabs.

Find a contact's address on the map

Enter an address on **Business**, **Postal**, or **Home** first. Open **Map**, choose the address to display, and click **Update**. You can pan and zoom to check the location. When you save the entry, PhonePad stores the map as a static image. If the address changes, use **Update** again to refresh it.

Find, print, or delete contacts

Use the **A–Z** tabs to filter contacts by name. Depending on your Address Book preferences, the tabs use first or last name. Choose **All** to show every entry. To search a specific field, enter text under **Search for**, choose the column, and click the magnifying glass.

Use the Address Book column settings to choose the fields shown in the list. To print a contact, open it and click **Print**. To print the list, use **Print** on the main Address Book screen. To remove a contact, select it, click **Delete**, and confirm.

Customize the Address Book list

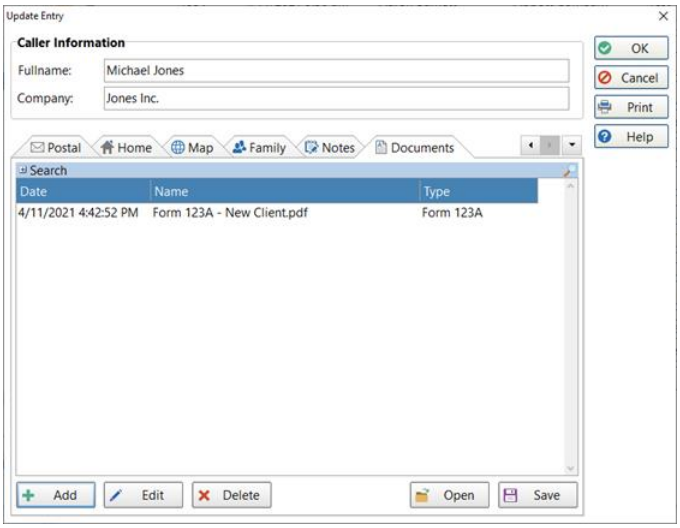
Click **Columns** on the Address Book screen. Check the columns you want to show. Use the up and down arrows or drag the column names to change their order. Use **Address Book Settings** to open the corresponding preferences, including whether the letter tabs use first or last names.

Attach documents to a contact

Open the contact and select **Documents**. Each contact has a separate list, so check the name before attaching a file.

Click **Add** and select the file. **Document Name** starts with the filename and can be changed to a label that is easier to recognize. Add a **Document Type** or **Description** if useful. To add a keyword, type it in **New Keyword** and click **+** or press **Enter**. Click the red cross beside a keyword to remove it.

Select a document and click **Open** to read it, **Save** to export a copy to a folder on your computer, or **Edit** to change the file, name, type, description, or keywords. Use **Delete** to remove it from the contact's list.



The Documents tab shows the files stored for the selected contact.

Find a document by keyword

On **Documents**, open the search panel with **+** if it is closed. Choose a keyword from **Keywords** and click **Search**. Click **Cancel Search** to show all documents for the contact again.

Import or export contacts

1. In the Address Book, click **Import** and choose a CSV file with field names in the first row.
2. Compare your column names with the mandatory and supported field lists in the importer. If needed, adjust the separator and field enclosure options.
3. Click **Load**. Review the data and check the marked columns. Unmatched columns are ignored, and required fields must be present before **Import** becomes available.
4. Click **Import** after verifying the preview. To export instead, choose **Export**, enter the folder and file name, and click **Export**.

If the **Import** button stays disabled after **Load**, check the required CSV column names. The importer provides lists of required and supported field names and a link to the CSV Header Editor. Correct the header row, load the file again, and review the preview before importing.

Deleting contacts in bulk. The **Clear** command on the Address Book screen deletes all entries after confirmation. PhonePad cannot recover entries deleted this way. Use **Delete** on a selected entry to remove an individual contact.

Set availability and route messages

Tell coworkers when you are available

Open **WhereRU**, select yourself, and choose **In**, **Out**, **Meeting**, **Busy**, or **Away**. Add status text or a return time if useful. Clear the return time when it no longer applies, or reset your status when you are available again.

Enter a comment directly in your own **Comments** cell in the WhereRU user list. Select a user to see their information in the **User Details** panel on the right.

Forward messages automatically

Automatic external forwarding depends on **MessageSender** and your office's configuration. Use the forwarding settings to choose another PhonePad user, email, SMS, or Pushover where available.

Set when forwarding applies, such as matching a WhereRU status, during or outside designated availability, or always. Set the recipients or devices for the chosen channel. Review the options to exclude private messages and forward only urgent ones, then save.

When replying to a forwarded email, keep the **MID** code in its subject. MessageSender uses it to match replies, read receipts, and delivery failures to the original PhonePad message.

Set availability for automatic forwarding

In **Availability**, check each day you want to include, then enter its start and end times. For each forwarding channel, choose whether messages should be forwarded during or outside those hours. For example, use your normal Monday–Friday hours and select forwarding outside those times if a coworker covers the inbox after hours. To forward to another PhonePad user, choose their name and click **Add**. Internal forwarding works without MessageSender. External channels require the corresponding service.

Customize the workstation

Choose what appears on screen

Change **User Interface Modes** under **View** to choose **Basic**, **Standard**, or **Advanced**. To choose individual buttons, open **View > Customize Toolbar**, clear the checkboxes for buttons you want to hide, and click **OK**. This creates the **Custom** configuration.

Resize panes using the dividers. In the message list, drag column boundaries to resize them or drag headings to change their order. Use the column options to decide what to display. Use **Preferences > Messages-4 > Show Message Counts** to turn folder counts on or off.

Set alerts and personal preferences

Open **Preferences** on the **Settings** toolbar or from **View**. Review the message, reminder, notification, startup, Address Book, and availability categories. For example, choose which inboxes **Message Alert** watches and how notifications appear. Start or stop **Message Alert** from **Tools**, or configure PhonePad to do it automatically.

Use **Control Bar** when you want common commands while PhonePad is minimized. It offers shortcuts to the inbox, message forms, reminders, Address Book, and available add-ons. Use its **Settings** control to change how it appears.

Send copies of outgoing call records

Open **Preferences > Messages-5** and add the people who need copies under **Outgoing Messages**. This setting applies to outgoing call records you log. Check the list before recording calls that may contain sensitive information.

Set up Message Alert

Open **Tools > Message Alert**, then right-click the purple tray icon and select **Settings**. Choose the inboxes to monitor, set how often to check for new messages, and choose how long notifications stay on screen. Select **Close after** to dismiss them automatically, then click **Save**. The command may be unavailable if you have no access to other inboxes.

Configure voice announcements and Control Bar

In **Preferences > Voice Announcements**, select the events you want spoken, such as new messages or due reminders. Choose a voice for each event and use the musical-note button to preview it.

Open **Tools > Control Bar** to launch the toolbar. To open it at startup, enable **Launch Control Bar when PhonePad starts** in **Preferences > General**.

Change your password

Choose **Password** on the **Settings** toolbar or from **Tools**. Enter your current password, type the new password twice, and click **OK**. Contact your administrator if you cannot sign in. PhonePad Web has a separate password-change procedure.

Use the To Do List

Open **To Do List** from **Follow Up** or **Tools**. Use this add-on to track tasks that need an owner, due date, or reminder.

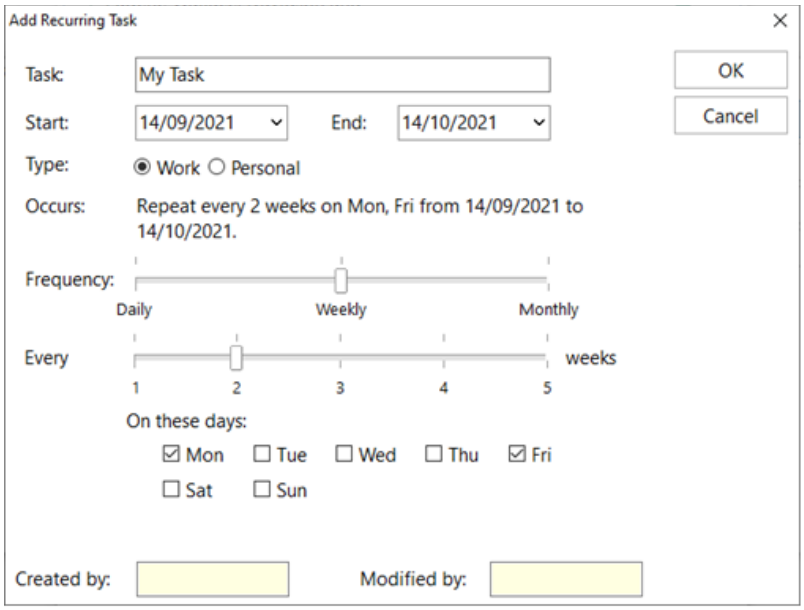
Add and manage a task

Choose **Add**. Enter the task and fill in the applicable due date, priority, reminder, and notes. Use personal tasks for your own work and work tasks when collaboration is needed. To reopen the source of a linked task, use **Open Message** from the task's context menu when available.

Select the task to edit it, mark it complete, or delete it. Use the context menu to print or refresh the list. Configure task reminders and columns for the information you need.

Set up recurring work

Open the recurring task manager and choose **Add**. Pick **Daily**, **Weekly**, or **Monthly**. Set the interval and the days or monthly pattern that apply. Review the schedule before saving. Select a recurring task in the manager when you need to edit or delete its schedule.



Choose the weekdays for a weekly task.

Share access to work tasks

In the To Do List access screen, select the users who may see your work tasks. Personal tasks are excluded from sharing. Use **Which To Do Lists Can I Access?** to check who has granted you access.

Use Appointment Calendar and PhonePad Chat

Open Appointment Calendar

Launch **Appointment Calendar** from PhonePad. Your administrator controls which calendars you can see. Use the separate **Appointment Calendar User Guide** for booking, rescheduling, recurring appointments, resources, and calendar administration.

Open PhonePad Chat

Use the **PhonePad Chat** command where available. Open the dedicated PhonePad Chat help for its messaging and configuration instructions. Older installations may refer to **InstantChat** in menus or Help.

Resolve startup and connection problems

When PhonePad cannot find the server

1. Start with the **Connection Troubleshooter** if it opens. Follow the prompts and note where the check fails.
2. Check whether coworkers can connect. If everyone is affected, ask your administrator to check the PhonePad Server service on the server or host PC. If only one workstation is affected, tell support which machine and network connection you are using.
3. Use **WorkstationConfig** with your administrator if the office uses a server address or **Server Access Key** in place of auto-discovery. A manually entered address must match the current server address.

When sign-in or versions do not match

For an incorrect password or disabled account, contact your administrator after checking the sign-in details. If the error reports a version mismatch, record the versions and ask the administrator to check the server update and workstation propagation. Server updates are applied on the server or host PC. Use the official update package and the administrator's update instructions.

Connect from outside the office

Ask your administrator to enable remote access and give you a **Remote Access Code**. The remote Windows computer needs PhonePad 5 Workstation installed and an internet connection.

Open **PhonePad Remote**, enter the code, and click **Connect**. When the PhonePad login window appears, sign in with your usual credentials. If the login window does not appear, check your internet connection and ask your administrator to verify remote access.

Troubleshoot freezes, permissions, or slow performance

Freezes on startup. If the freeze began after an installation or update, report when it started and ask your administrator to check whether endpoint protection is blocking PhonePad.

I/O Error 103. Ask your Windows administrator to check whether PhonePad can write to its workstation folders. For a default installation, check **C:\PhonePad5** and **C:\ProgramData\Cybercom Software\PhonePad5**.

Slow performance. Note whether it affects one workstation or several, what action is slow, and whether it happens at a particular time. Your administrator can use this information to check the workstation, network traffic, or server load.

Gather details for support

Record the error text and the steps that led to it. Note which workstation and users are affected and whether the problem happens every time. Open **System Information** from **Help** to collect the version and environment details. Use **Help** to submit a support request or visit **www.cybercom-software.com/support**.

Find help and account information

Use **Help** to open online help, video tutorials, the Admin Guide, your online account, or the support options. Use **About** to check the installed version. License and Update Plan information is available from **Help**. If you renew and the displayed plan details are out of date, use **Refresh** in the Update Plan screen to retrieve the updated details.

Renew or refresh your Care Plan

Open **Care Plan** from **Help**. Choose **Renew** and follow the prompts to open the renewal site. Review the renewal details and complete payment. When you receive your new **Care Plan Number**, enter it on the renewal screen and click **Activate**. If the displayed details have not updated, use **Refresh**.

Keyboard shortcuts

To do this	Press
New Phone Message	Shift+Insert
New Outgoing Call	Ctrl+Insert
New Text Message	Alt+Insert
Global Search	F3
Delete a selected message	Delete
Move selected messages by dragging	Hold Alt while dragging
Open selected message	Enter
Open Address Book	F4
Check Inbox	F5
Refresh Inbox	Shift+F5
Refresh user list	F6
Exit PhonePad	Ctrl+Alt+X

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