Chapter

4 Record Folders

Introduction

Before computers started taking over everyone's offices, paperwork and information were stored in filing cabinets filled with manila folders. Each folder contained related information, such as invoices from a single vendor, all contact information for a specific person or company, or directions to different office locations. Even in today's state-of-the-art high-tech offices, the old filing cabinet and its hundreds of folders can still be found.

DeskTop Set uses this familiar paradigm to organize your Address Book entries, with their address and phone information, all related documents and files, phone conversation histories, pending messages, and more.

To open a folder:

- ♦ In Address Book, find the entry whose folder you want to open.
- ♦ Double-click on the entry's page name.

Contact Information

A folder's *Record* tab stores an entry's personal information, such as addresses, phone numbers, birthdays, e-mail addresses, etc. This information is grouped by topics into related fields, such as *business* fields, *home* fields, and so on. You can find the various filter tabs at the bottom of the folder window.

To open to the *Record* information:

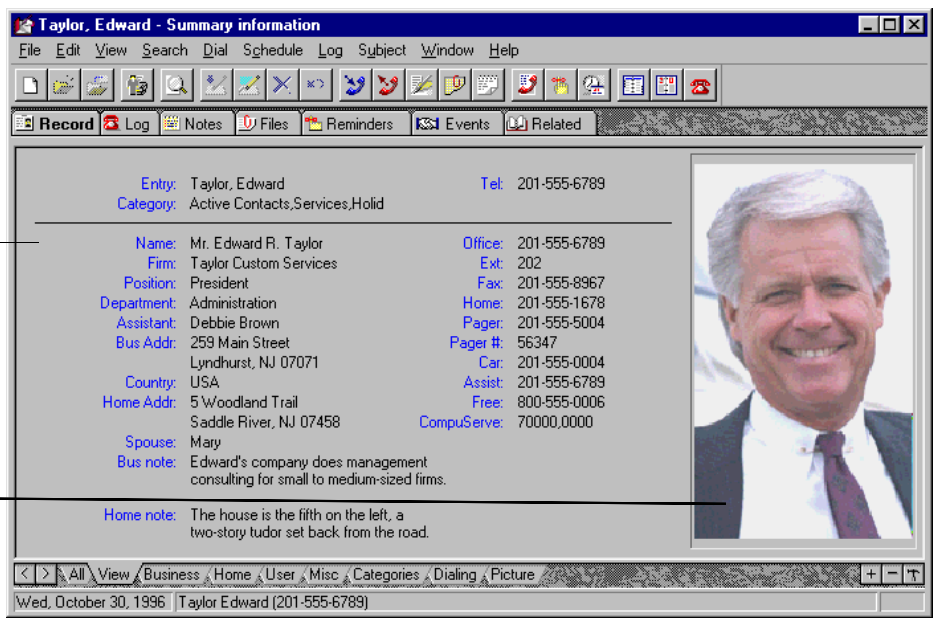
- ♦ Double-click the person's name to open their Folder.
- ♦ Click the ***Record*** tab.

View

The View window displays personal information in one location. You can see important address, phone, and company information as well as an imported picture.

To open the View screen:

- ♦ Click the ***Record*** tab under the toolbar.
- ♦ Click the ***View*** filter tab near the bottom of the window.



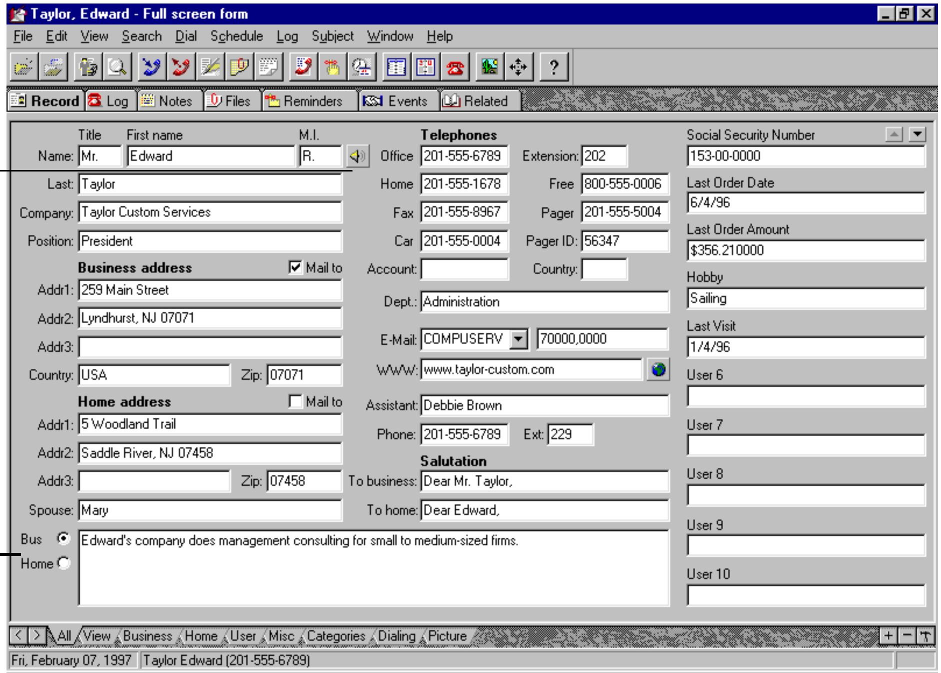
The View screen shows you company, address, phone, and personal information at a glance.

The All tab

When you are creating a new record, you can enter all personal information, including user fields, in one convenient dialog box.

Click this button to test the sound associated with this folder.

Toggle between editing business and home notes.



The All topic lets you edit all Record information at once.

To open the Full screen:

- ♦ Click the *Record* tab.
- ♦ Click the ***All*** filter tab.

To edit information:

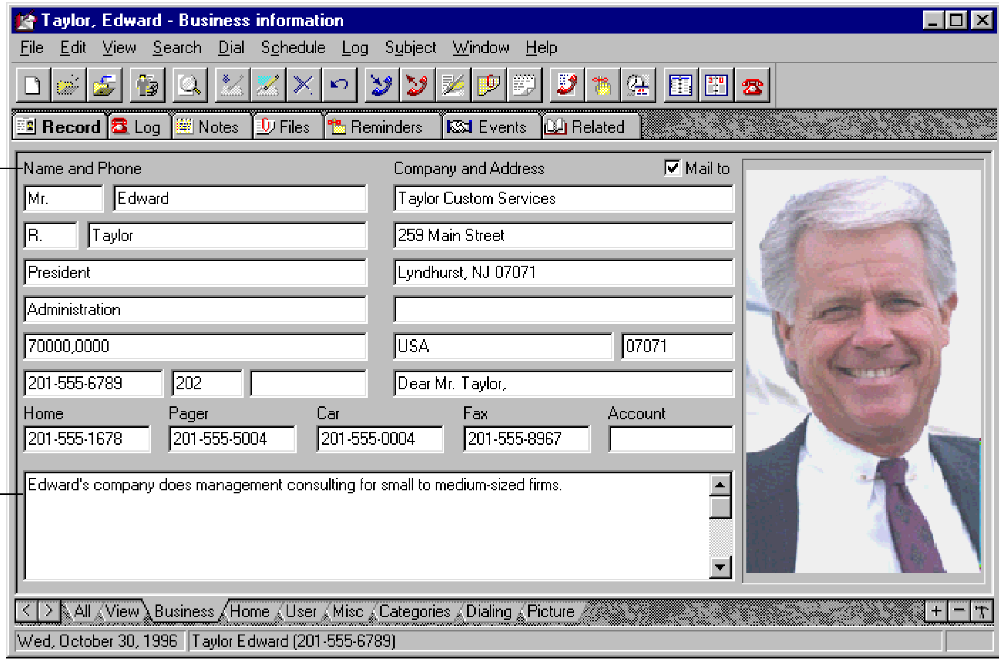
- ♦ Click on the field you would like to edit.
- ♦ Make any necessary changes.

Business Information

Use the Business tab to enter the company name, business address, phone, pager, fax, car numbers, and other information.

This label tells you which field the cursor is currently located in.

This field can contain up to 299 characters of brief business-related notes.



Use the Business screen to view and edit business information.

To open the Business screen:

♦ Click the ***Record*** tab under the toolbar.

♦ Click the ***Business*** filter tab near the bottom of the window.

To edit information:

♦ Click on the field you would like to edit. The blue upper label changes to show which field you have selected.

♦ Make any necessary changes.

♦ To save your new information, select **File/Save** from the menu or click another tab.

The fields are self explanatory, but here are some notes:

✦ If a field scrolls as you enter text, just keep typing. The field stops accepting characters when it is full.

✦ The *Notes* field is meant for brief notes and can hold up to 299 characters. The text word-wraps as you enter it. If you need to make longer, unlimited notes, use the **Log/Note...** command from the folder's menu (see "Attached Notes" on page 174 for details).

- The labels on the phone number fields can be customized for each record. For example, you may have an associate in your book that has no pager number, but two fax numbers. You can change the pager label to *Fax 2* in this case (see "Dialing Options" on page 158).
- Check the *Mail to* checkbox to instruct Address Book to automatically use this address for printing and mailing purposes. For more information on printing, see "Printing with Address Book" on page 101.
- Address Book's Page Name and Page Number are separate from the names and numbers in the *Business* and *Home* screens. This allows you to use a mnemonic reference on the page, such as *Mom*, then put a formal name in the Business tab.

Mail To

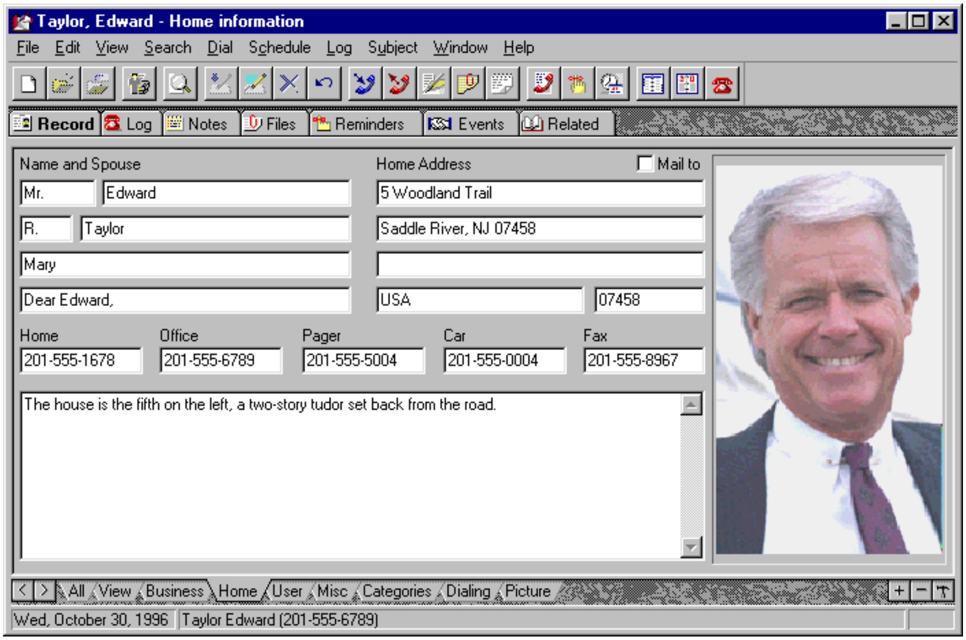
Selecting this check box chooses this address as the default mailing address. For example, you can check *Mail to* in the ***Home*** tab for one entry, and in the ***Business*** tab for another. When printing labels, if you select the `<MAIL ADDR#>` keywords for address information, it prints the home address for the first entry and the business for the other.

Salutation Field

When you first enter the *Salutation* field, Address Book attempts to create a salutation using the *Default Business Salutation* template found in the *Address Book Setup* dialog box's ***Templates*** tab. Feel free to change the salutation field if you prefer something else. For more information on the salutation templates, see the "Copy Templates" on page 144l.

Home Information

The Home screen is very similar to its Business counterpart. If you didn't read the "Business Information" section, please do so now so you will be familiar with the subjects discussed here.



The Home topic lets you edit home information.

To open the Home screen:

- Click the ***Record*** tab under the toolbar.
- Click the ***Home*** filter tab near the bottom of the window.

To edit information:

- Click on the field you would like to edit. The upper blue label changes to show which field you selected.
- Make any necessary changes.
- To save your changes, select **File/Save** from the menu, **or...**
- Select another tab.

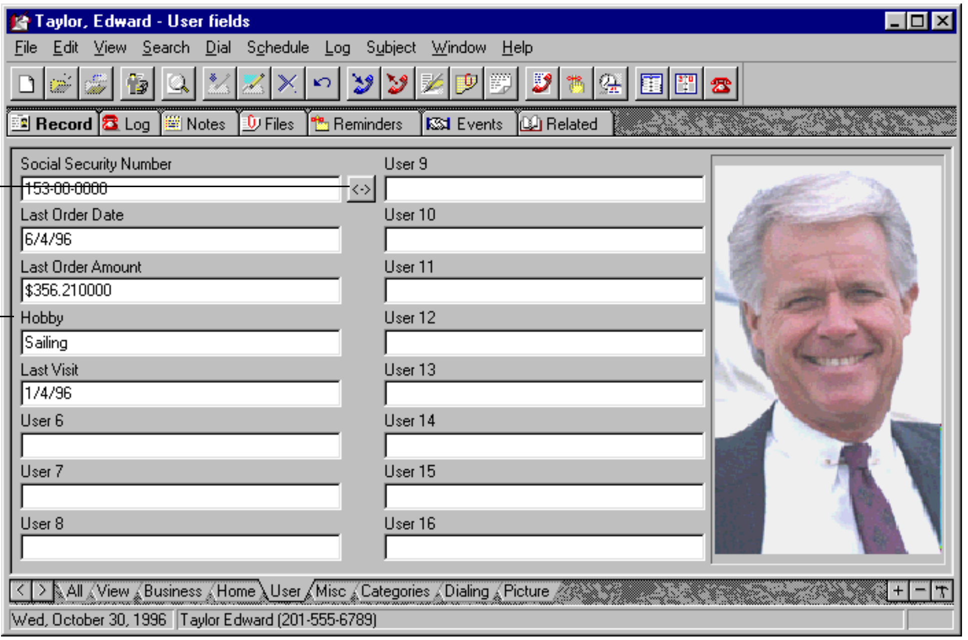
Note: Address Book's Page Name and Page Number are separate from the names and numbers in the Business and Home folder screens. This allows you to use a mnemonic reference on the page, such as Mom, then put a formal name in the folder.

User Fields

Address Book has 32 user-definable fields that you can use to meet your own specific requirements. They supplement the Business, Home, and Misc. screens. For example, lawyers commonly put case codes and information here. Doctors can put patient ID numbers or other related information. A Human Resources Director may put Social Security numbers here. If you need to store personal information that doesn't fit on any other *Record* filter tab, customize the user fields.

Click this button to view the next sixteen fields.

You can customize field names in Address Book's *Setup* window.



The User Field screen shows sixteen fields at a time. Click the <-> button to toggle between the first and last sixteen fields.

Editing User Fields

User fields can be defined in the *Address Book Setup* dialog box (see "User Fields" on page 142). Once they have been configured, you can add or edit information just as you would in the Business or Home screens.

To open the User fields screen:

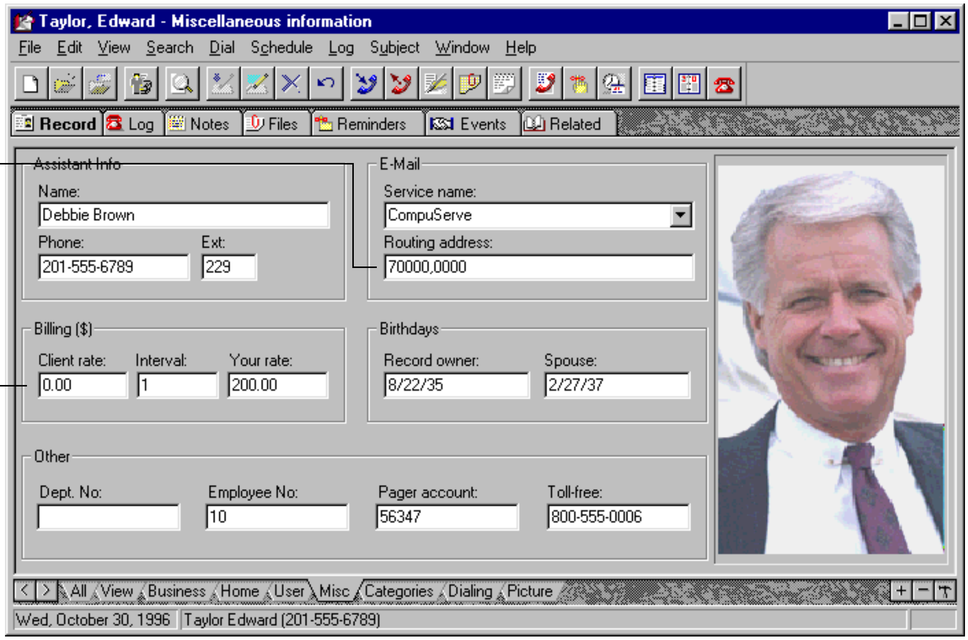
- ♦ Click the ***Record*** tab under the toolbar.
- ♦ Click the ***User*** filter tab near the bottom of the window.
- ♦ To view the next or previous sixteen fields, click the **<->** button.

Miscellaneous Information

The Miscellaneous screen holds information that doesn't fit neatly under the Business or Home headings, such as birthdays and billing rates.

Enter e-mail service names and addresses as you would like them to appear in Microsoft Exchange.

If you bill or are billed by this person, put the rates here.



Use this screen to store odds and ends, such as e-mail, assistant, and billing information.

To open the Miscellaneous screen:

- Click the ***Record*** tab under the toolbar.
- Click the ***Misc.*** filter tab near the bottom of the window.

You can edit information in the Miscellaneous screen just as you would in the Business or Home screens.

Note: The birthday fields are for reference only. We suggest that you store birthday information in Reminders, which notify you of upcoming events. For more information, see "Reminders and Alarms" on page 182

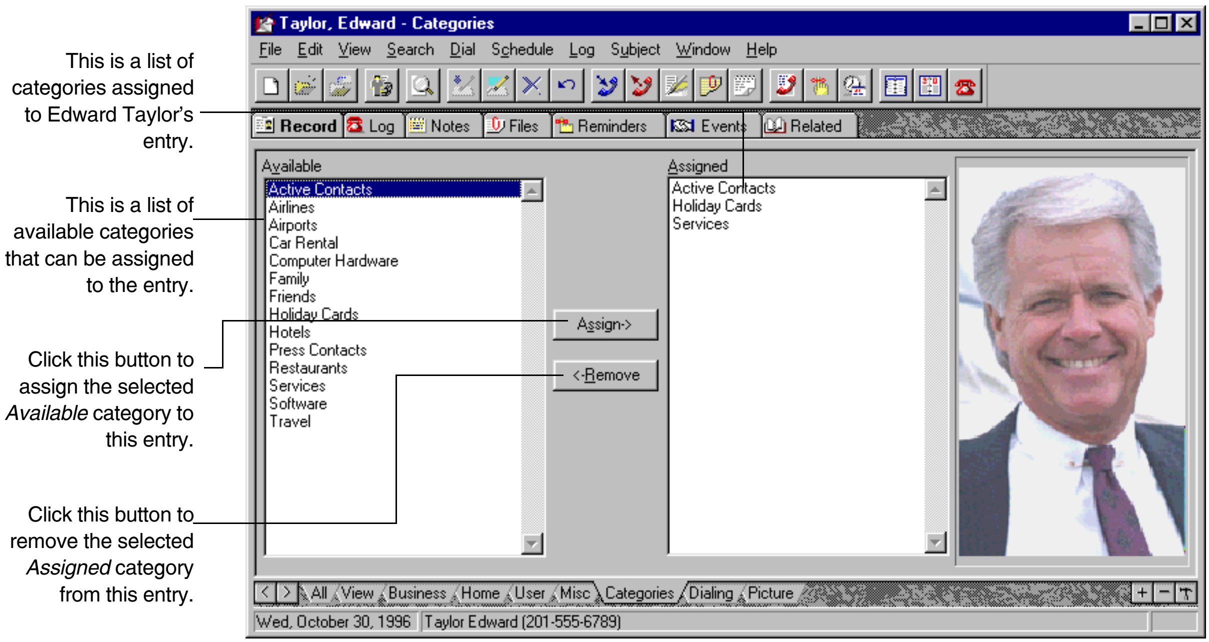
Categories

You can assign up to 128 categories to an entry. If you have a friend who is a lawyer, that person can be assigned to the *Friend* category and the *Lawyer* category. All the people assigned to a certain category can be listed together, so you can see all lawyers by viewing the *Lawyer* category. The Categories screen lets you assign categories to (and remove them from) an entry.

Before you can use categories, you must create them in the *Address Book Setup* dialog box (see “Categories” on page 140).

To open the Categories screen:

- Click the ***Record*** tab under the toolbar.
- Click the ***Categories*** filter tab near the bottom of the window.



The Categories screen lets you assign or remove categories for this folder’s entry.

Option	Description
Available	This list box displays all the categories that are defined for this Address Book. If the list is empty, then you have not created any categories.
Assigned	This list box displays all the categories that are assigned to the current entry.

To assign a category:

- Select one of the *Available* categories.
- Click the **Assign** button.

To remove a previously assigned category:

- Select the category from the *Assigned* list.
- Click the **Remove** button.

Dialing Options

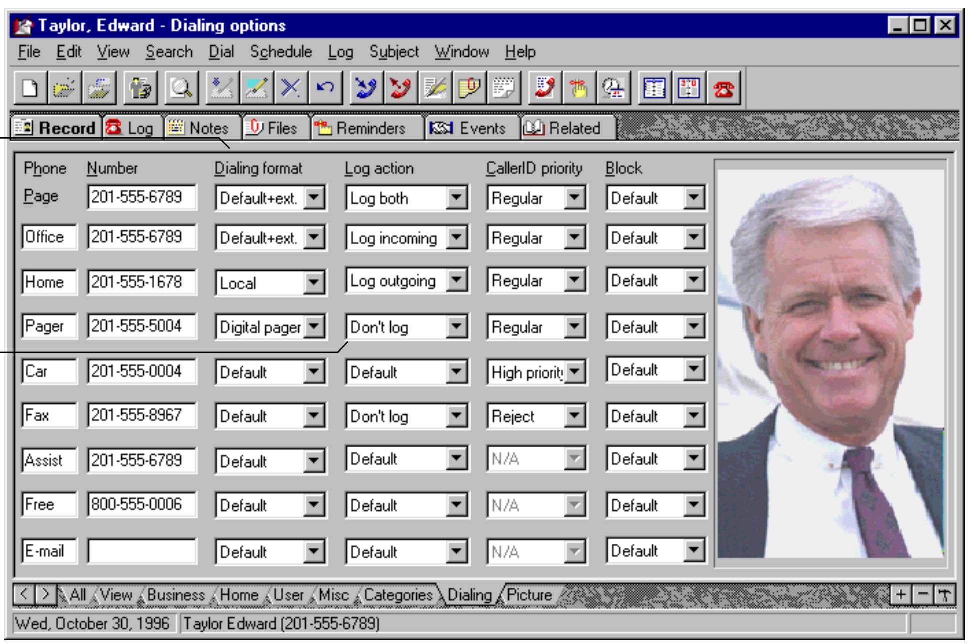
Based on a caller's geographical location, any phone number can be dialed internally, locally, long distance, as an extension, internationally, or with other additional formats. You can assign a specific dialing format to each phone number, so pagers are dialed properly as well as fax numbers. For information on setting up formats, see "Dialing formats" on page 318.

To open the *Dialing Options* screen:

- Click the ***Record*** tab under the toolbar.
- Click the ***Dialing*** filter tab near the bottom of the window.

This column shows the dialing format for each of Edward's phone numbers.

You may select whether or not to automatically log phone calls for each number. You can set the *Default* option in Dialer Setup.



You can use this window to change telephone labels and dialing formats. This allows you to override Dialer's default dialing for specific phone numbers, such as pagers.

Dialing format The third column displays combo-boxes for choosing the desired dialing format for the corresponding number. Each number in Address Book is automatically assigned the *Default* dialing template. You can select any format for each individual number.

To change a number's format:

- ♦ Open the combo-box for the number by clicking on the down-arrow.
- ♦ Select the desired format.

Log action The fourth column defines how the phone log behaves when you place or receive a call for that number. You can select to log incoming or outgoing calls, or not to log calls from that number (for a fax number, for instance). All numbers are automatically assigned the *Default* log action, which is configured in *Dialer Setup* (see the Reference manual).

To change the logging behavior:

- ♦ Open the combo-box for the number by clicking on the down-arrow.
- ♦ Select the desired format.

CallerID priority CallerID can be configured to behave differently for calls of different importance. The fifth column lets you select each number's priority, letting CallerID know how to react to calls from that number. You may want to configure a car phone as high priority (since they are more expensive to use), an office number as regular priority, and a fax number for reject (since a fax machine calling your voice line is probably a misdial).

To change the CallerID priority:

- ♦ Open the combo-box for the number by clicking on the down-arrow.
- ♦ Select the desired format.

CallerID block Now that phone companies send and receive CallerID information across area codes, privacy has become an issue. You may want to send CallerID signals to your friends, family, and associates to let them know who is calling, but prevent marketing associations from receiving your number. The last column allows you to decide which numbers receive your CallerID information and which ones do not. All numbers are automatically assigned the *Default* block action, which is configured in *Dialer Setup* (see page 318).

To change the CallerID block action:

- ♦ Open the combo-box for the number by clicking on the down-arrow.
- ♦ Select the desired format.

Folder Pictures

You can import a picture into a folder to display a person, office location, real estate location, or anything else related to that entry. Folders can read images in bitmap (BMP), PCX, GIF, Tagged Image Format (TIF), or Targa (TGA) formats.

To import a picture into a folder:

- Select **Edit/Picture** from the menu.
- Select the image file you would like to import and click **OK**.

To view the picture:

- Open the *Record* tab.
- Click the ***Picture*** filter tab.

Folders have a *stretch-to-fit* feature that expands an image horizontally to fill all available room. If you have a small picture, you may want to turn this on to enlarge the image. If stretching the picture makes it too large to fit vertically, you may want to turn this off.

To toggle the stretch-to-fit option on and off:

- Right-click on the picture. A menu appears.
- Select **Stretch to fit**.

To display the picture in all *Record* topics:

- Select **View/Picture** from the menu. A checkmark appears next to this menu option.

To remove the picture from other *Record* topics:

- Select **View/Picture** from the menu. The checkmark disappears from this menu option.

Folder Sounds

You can record an audio.WAV file for each folder. This can be played when you open the folder, or when CallerID receives an incoming call from this person. See “Using Voice Recorder” on page 336 for more information.

Linking Folders

Linking is convenient way to share and update common information between folders. If, for example, you are dealing with several individuals from the same company, you want the company's address and phone number to be in each of the entries. There is no need to retype the information for every individual; You can enter it just once and then link it to all the entries. Any changes made to the master record are immediately reflected in all the linked entries.

This is the available information that can be linked to other records.

Select which information from the master record is linked.

Linking fills in data fields in the linked records with corresponding information from the *master* record. To link records, you must first select the master record. The master record is Address Book entry that has the information you wish to use in other records.

To select a master record:

- Select the record.
- Select the **Edit/Link master...** command. The *Link master* dialog box appears.

The top section of the dialog box displays the information for the master record. This is just for your review, and cannot be edited from here.

Note: Entries which are already linked to master records cannot be used as masters themselves. Therefore, if *Kevin Taylor* is linked to *Okna Corporation* (the master record), *Kevin Taylor* cannot be used as a master record.

You can select which addresses and phone numbers you want to be available to other records. For any box that is checked, the corresponding information can be linked.

To select link options:

- ♦ Check the desired boxes to select the information to be linked.
- ♦ Click the **OK** button.

You have now selected the current record as the master link record, and it remains so until you select a new master record or until you quit the application.

Linking to other entries

To link information to another entry:

- ♦ Open the folder to which you wish to link the information.
- ♦ Click the ***Record*** tab.
- ♦ Select **Edit/Link...** from the menu. The *Link options* dialog box, which is identical to the *Link master* window, appears.
- ♦ Review the master record's information and check which fields you want to link.
- ♦ Click **OK** to complete the link.

You should now see the information from the master record pasted into the corresponding fields in the current entry. As long as the link is maintained, any time you update the *master* record, the linked records is also updated to reflect the changes.

The text in the linked fields is displayed in gray text and cannot be edited.

Changing link options

At some time you may need to change which information is linked without severing the entire link itself. For example, if a person's department receives its own fax machine, you may want to unlink the company-wide fax number and replace it with the new one.

To change link options:

- ♦ Open the folder you wish to change.
- ♦ Select **Edit/Link...** from the menu. The *Link options* dialog box appears.
- ♦ Select the items to unlink by un-checking the associated boxes.
- ♦ Click **OK** to save your changes.

Removing links

There are two reasons that you may want to remove a link. First, you may no longer want to associate the person with the *master* record (they may no longer work for that particular company, for example). Second, you may not want the entry information to be updated every time the *master* record is changed.

For example, you may have a person in your book that works for a particular company, but he works at a remote location, so his record information is slightly different from the master record. You could use the **Link** command to copy the information from the master record into his entry. Then unlink his record so you can make minor changes. After it has been unlinked it is not affected by changes to the master record.

To unlink the current entry from the master record:

- ♦ Open the folder you wish to change.
- ♦ Select **Edit/Link...** from the menu. The *Link options* dialog box appears.
- ♦ Click the **Unlink** button. The previously linked text turns black and can be edited.

The Phone Log

Address Book's call logging feature allows you to keep track of outgoing and incoming phone calls as well as messages. For each call, the log keeps track of the date, time, duration, personal information, call attributes, the subject of the conversation, and the call's results.

Phone Log makes sure you never forget a conversation, and are always informed in issues of "you said / he said."

To view the Phone Log:

- ♦ Click the folder's ***Log*** tab.
- ♦ Use the filter tabs below the list to specify which type of calls you want to see.

Phone Log Setup

You can configure Phone Log to use any combination of Address Books, as well as set up network messaging services and its behavior.

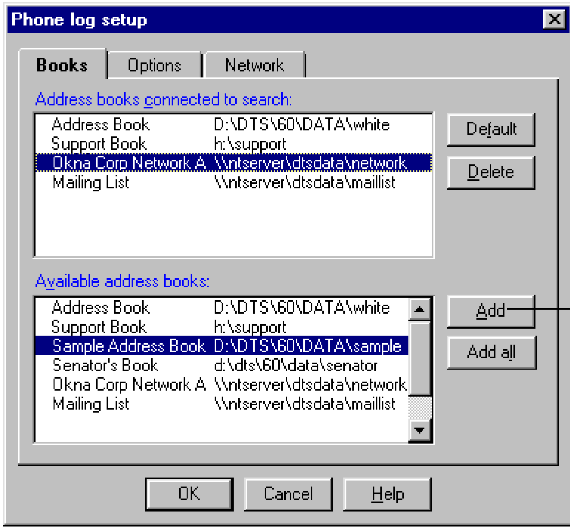
Books to Search

When you are creating a new log entry, Phone Log has the ability to search Address Book files by first and last names, company, and phone number. Select which files you want Phone Log to use for this search.

To select which Address Books Phone Log can search:

- ♦ Select **File/Setup...** from the menu and click the ***Books*** tab.
- ♦ Under *Available address books*, select the address book you want phone log to search.

- Click the button to add the book to the search list.
- Click **OK** to save your changes.



Click here to add an address book to the search list.

Phone Log has a telephone number search that uses the address books you select here.

Option	Description
Books to Search	This box shows all Address Books that the Phone Log is set to search.
Available Address Books	This box shows all of your DeskTop Set Address Books.
Default	This selects the currently highlighted search book as a default. Any new people or companies added from Phone Log are placed in this address book.
Delete	Click this button to remove the selected Address Book connected to search.
Add	Click this button to move the selected available Address Book to the *Books connected to Search* list.
Add all	Click this button to move all available Address Books to the *Books connected to Search* list.

Options

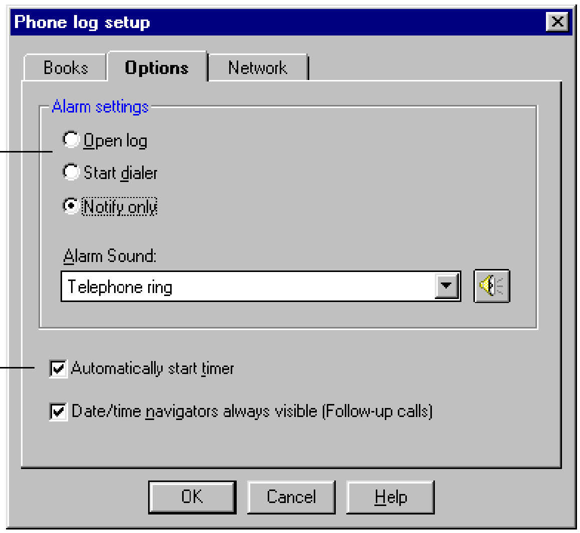
This section controls Phone Log's behavior.

To change the Phone Log's settings:

- Select **File/Setup…** from the menu and click the ***Options*** tab.
- Select the settings you want.
- Click **OK** to save your changes.

Select how Phone Log behaves when the time comes for a pending call.

Check here if you want the timer to start every time you create a new log.



Select how Phone Log behaves when an alarm goes off.

Alarm settings

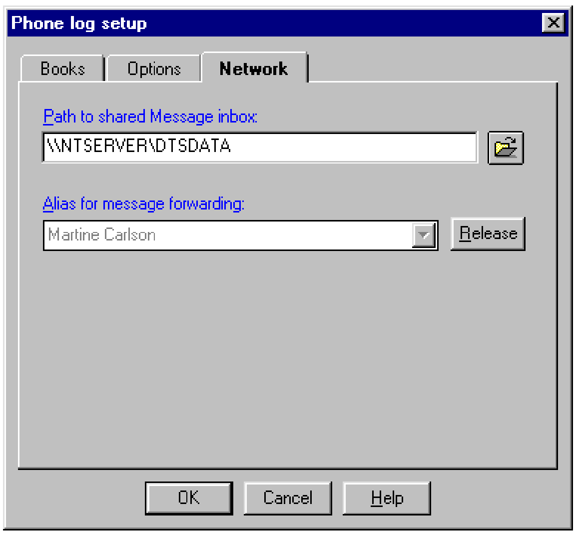
Phone Log lets you schedule pending calls, which sounds an alarm to remind you to contact someone. This section controls how Phone log responds when an alarm goes off.

Option	Description
Open log	Opens the phone log.
Start dialer	Launches Dialer and automatically calls the entry for whom the phone call was scheduled.
Notify only	Only sounds an alarm and displays the Alarm Monitor window. This lets you open the phone log and call the person when you are ready.
Alarm Sound	Select which sound will play when an alarm goes off.

Automatically start timer	Begins the call length timer when you create a new log entry.
Date/time navigators always visible	When you are scheduling a follow-up call, check this option to replace the *Notes* field with the mini-calendar and clock controls to speed up entry.

Network

If you are using DeskTop Set on a network, Phone Log lets you take messages for your colleagues at other workstations. First you must select an existing network directory or create one to use as a common inbox. This directory is commonly located on a network server. DeskTop Set uses this directory to store user names and route messages. Then you must register a unique name for every workstation that uses this messaging service.



Select which directory should be used as a network inbox, and register a name for this computer.

Option	Description
Path to shared Message inbox	This is the directory name for the shared message inbox. To locate the correct path, click the button to the right of this field and select the proper computer and directory.
Alias for message forwarding	This is the name that is used to send messages to this workstation. It is commonly the name of the person who uses that computer.
Register/Release	Click **Register** to add the name to the network message inbox. Click **Release** to remove the name from the inbox list.

To set up network messaging services:

- If this is the first workstation being set up, select or create a directory on the network server to be used for a message inbox.
- Open the *Phone Log Setup* window.
- Click the  button next to *Path to shared Message inbox*.
- Select the network message inbox's computer and directory, then click **OK**.
- Type your name under *Alias for message routing*. It must be unique to all other names currently being used.
- Click the **Register** button. Your name is added to the network message inbox. Anyone on the network is now able to take messages for you.

To remove your name from network messaging services:

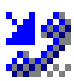
- Open the *Phone Log Setup* window.
- Click the **Release** button. Your name is removed from the network message inbox, and other network users are not able to send you phone messages.

Logging Phone Calls

DeskTop Set allows you to log incoming and outgoing calls using virtually the same method.

Incoming Calls

To log an incoming call:



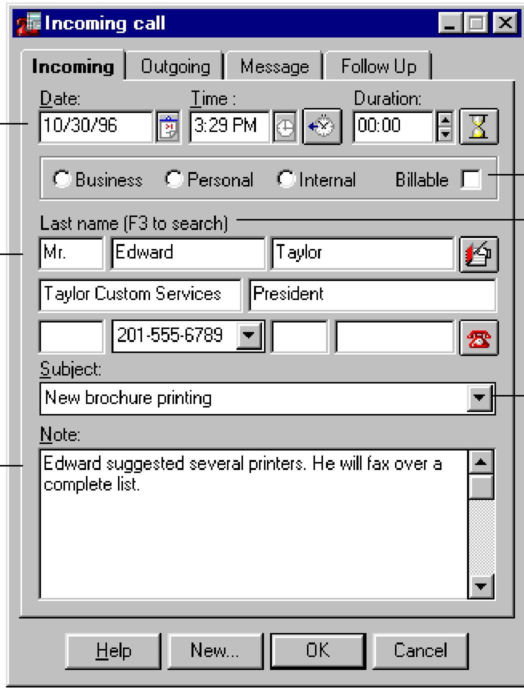
Incoming call icon

- Highlight the Address Book entry or open the folder for the person who is calling.
- Select **Log/In-call...** from the menu. The *Incoming call* window appears.
- Select the call type (business, personal, etc.).
- Fill in the *Subject* field.
- Fill in the *Note* field with a summary of your conversation.
- You can turn the *Duration* timer on and off by clicking the  button.
- When the call is complete, click the **OK** button. If the timer is still running, it is automatically turned off.

This shows when the conversation took place, as well as its length.

This area contains information about the person you spoke to. The label above shows which field the cursor is in.

Enter your notes about the conversation here.



Select the call's nature from here.

Press F3 to search for all *Taylors* in your address books.

This contains the conversation's topic.

Log your phone conversations using this form.

Option	Description
Date	This is the date the call took place.
Time	This is the time the call took place.
Current time button	Click this button to set the *Call time* to the current time.
Duration	This is the length of the conversation.
Timer button	Click this to turn the duration timer on and off.
Call type	Select which type of call it is: *Business*, *Personal*, or *Internal*. If you can bill or are billed for this call, check *Billable*.
Person's information	This contains contact information, such as name, company, phone number, and extension, for the person you are speaking with. This section's label changes to show you which field the cursor is in.
Folder button	Click this to open the log entry's related folder.
Dial button	If a number appears in the *Phone* field, this launches the Dialer and loads the phone number.

Subject	This is the topic of conversation.
Note	Write details about the conversation here.

Button functions

Command	Description
New...	Starts a new, blank phone log.
OK	Closes the window and saves your changes.
Cancel	Closes the window without saving changes.
Help	Opens the help file to information about this dialog box.

If you receive an incoming call, you may not have time to search for and open the caller's folder. Here is a quick way to start a Phone Log and make DeskTop Set find the proper person.

To have Phone Log find the caller's folder:

- Select the **Log/In-call...** menu command from Address Book or any folder. The *Incoming call* window appears with the selected entry's information.
- Type either the person's first name, last name, company name, or phone number in the proper field.
- Hit **F3** to search your Address Book files. A window appears listing all matching entries.
- Highlight the correct entry and click **Select**. That person's information is filled in, and the log entry is linked to their folder.
- Finished logging the call normally.

Outgoing Calls

To log an outgoing phone call:

Outgoing call icon

- Highlight the Address Book entry or open the folder for the person who is calling.
- Select **Log/Out-call...** from the menu. The *Outgoing call* window appears.
- Complete your log the same way you would for an incoming phone call.

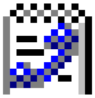
Editing Phone Log Entries

To edit a phone log entry:

- ♦ Highlight the log entry you wish to change.
- ♦ Select **Edit/Edit record...** from the menu.
- ♦ Make any necessary changes, and click **OK**.

Taking Messages

The Phone Log lets you take messages for other DeskTop Set users on a network, or simply transcribe your own voice mail for personal use.



Message icon

To view messages for a particular folder:

- ♦ Click the ***Log*** tab under the toolbar.
- ♦ Click the ***Message*** filter tab near the bottom of the window.

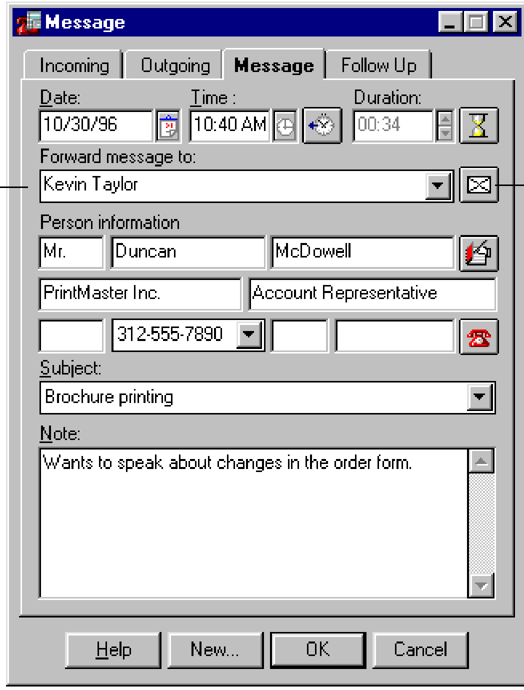
Taking a message

Taking a phone message is quick and easy. You may not even have to touch the keyboard. The *Message* window is similar to the one used for Phone Log entry. Please read the previous Phone Log sections if you have not already.

To take a message for yourself (transcribing voice mail):

- ♦ Select the **Log/Message...** menu command from Address Book or any folder. The *Message* window appears with the selected entry's information.
- ♦ Fill in the appropriate information
- ♦ Click **OK** to save your message.

If you are taking a message for someone else, select their name here.



Click this button to send the message to its recipient.

This window is lets you transcribe your voice mail or take messages for other network users.

Most of the *Message* window is identical to the *Incoming call* dialog box (see "Incoming Calls" on page 167). Here are the two differences:

Option	Description
Forward message to	If you are taking a message for someone else, select their name from this drop-down list.
Send button	This sends the message to the person listed in *Route message to*.

To take a message for someone else:

- Open the *Message* window and enter the appropriate information as described above.
- Under *Forward message to*, select the name of the person you want to send the message to.
- Click the button to the right of the recipient's name. The message is sent.

Receiving messages

When someone sends you a message over the network, you receive a notification that says, “New messages have arrived from the shared inbox. Do you want to see them now?”

To view the new messages immediately:

- Click **Yes**. The new messages open for you to review.
- When you are done viewing each message, click **OK** to move them from the network inbox to your Phone Log.

To view the new messages later:

- Click **No**. The new messages remain in the inbox.
- When you are ready to review the messages, click the Phone Log’s ***Forward*** filter tab. This displays all messages in the inbox for that folder.

Returning messages

To return a message immediately:

- Highlight the message you would like to return.
- Select **Edit/Edit item...** from the menu.
- Click the ***Outgoing*** tab.
- Click the  button to place the call.
- Enter the conversation’s notes in the log form.
- When you are through with the call, click **OK**. This removes the message from your phone log and adds a new outgoing call entry.

To schedule an alarm to return a message later:

- Highlight the message you would like to schedule the call for.
- Select **Edit/Edit item...** from the menu.
- Click the ***Follow-up*** tab.
- Fill in the necessary information in this dialog box (see the next section for details).
- Click **OK**. This removes the message from your phone log and adds it to the Pending Calls list.

Scheduling Follow-up Calls

DeskTop Set lets you set a reminder to place a follow-up call. DeskTop Set's Alarm Monitor alerts you when it is time to call. For more details, see "Alarm Monitor" on page 243.

To view the pending follow-up calls:

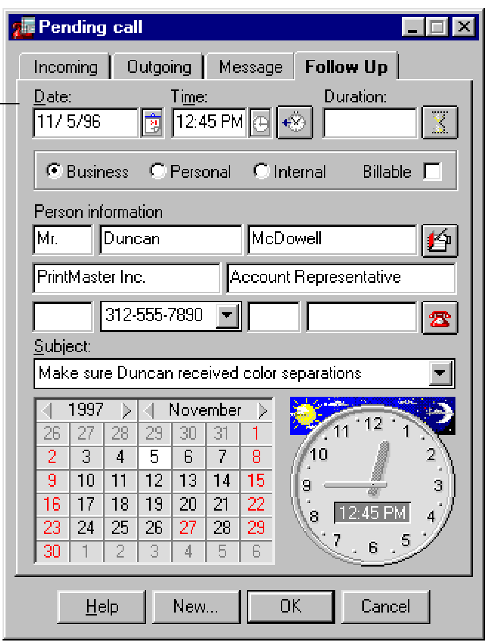
- Click the folder's ***Log*** tab.
- Click the ***Pending*** filter tab.

Scheduling follow-up calls

To set a reminder for a follow-up call:

- Open the folder for the person you wish to schedule a call for.
- Click the ***Pending*** tab.
- Select **Edit/New...** from the menu.
- Use the mini-calendar and clock controls to set a return call date and time.
- Change any other information that you need.
- Click **OK** to save the follow-up call reminder.

This is the date and time you would like to make the follow-up call. You may either type this information or use the Mini-Calendar and Clock controls below.



You can schedule alarms that remind you to return messages at a later time, or call to follow up on any task.

Placing a follow-up call

When the time for a follow-up call arrives the *Alarm Monitor* window appears and sounds an alarm. If you have set up the Phone Log to automatically dial pending calls, Dialer launches and calls the number for you. If you prefer to dial the number yourself, do the following:

To place a follow-up call:

- Highlight the follow-up call in the Alarm Monitor.
- Click the **Off** button to turn the alarm off.
- Click the **Open Log** button.
- Click the  button to have Dialer call the number.
- Click the ***Outgoing*** tab to change this entry from a follow-up call to an outgoing call log entry.
- When you have finished your call and entered all appropriate information, click **OK** to save your changes.

Attached Notes

You can create a virtually unlimited number of notes for each Address Book entry, using any word processor or program you like. Notes can contain directions to offices or homes, pictures of logos or maps, or anything else related to an entry. Description text, note categories, and search keywords make it easy to maintain large lists of notes for any entry in your book.

In general, notes are specific to the folder they are attached to, and must be created from the folder. To keep track of letters or faxes sent to a person, group project data, or any other file created elsewhere, use attached files (see “Attached Files” on page 179).

To view attached notes:

- Click the folder’s ***Notes*** tab below the toolbar.
- Use the filter tabs at the bottom of the window to specify which type of notes you want to see.

Setting Up Notes

You can create a note using any Windows application installed on your computer. That means your notes can contain images, spreadsheets, financial data, audio messages, or anything else you may require.

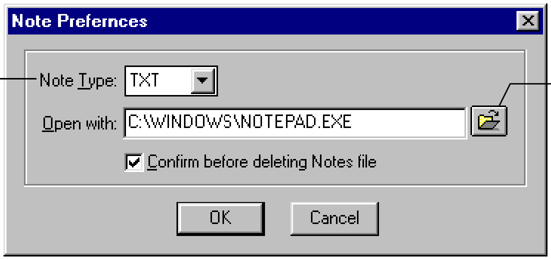
Notes default settings include the following file formats:

Extension	File Format	Program
BMP	Bitmap	Microsoft Paint
DOC	Word Document	Microsoft Word
TXT	Text	Microsoft Notepad
WAV	Wave Sound	Sound Recorder
WRI	Write Document	Microsoft Write
XLS	Excel Worksheet	Microsoft Excel

If you prefer to use another word processor or spreadsheet program, or have other software you commonly use, you can add those programs and file types to Notes setup.

To open the *Notes Preferences* window:

- ♦ Click the folder's ***Notes*** tab.
- ♦ Select **File/Setup...** from the menu.



Use this window to enter new file types and select which program is used to create notes.

Option	Description
Note type	This shows the three-character file extension for the note format you have selected. This is the last three characters which appear after the period in all data files a program creates. For example, Microsoft Word's document files all have the extension DOC, such as REPORT.DOC and PROGRESS.DOC.

Open with — This lists the program that is used to create and edit the selected Note type. Click the button to the right of this field to select another program.

Confirm before deleting... — Check here to have DeskTop Set ask you for confirmation before it deletes any note file. This can prevent you from deleting a note file by mistake.

To select which file type is used to create new notes:

- Select the proper three-character file extension from the *Note type* list. Its related program appears under *Open with*.

To define a new file type:

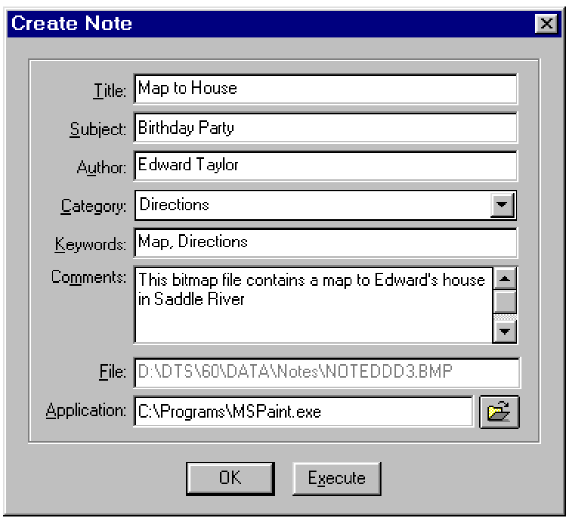
- Under *Note type*, enter the three-character file extension for the file format you wish to use.
- Click the button. It has a picture of an opening folder on it.
- Select the program you would like to use for the new note type and click **OK**.
- Click **OK** in the *Note Preferences* window to save your changes.

Creating a Note

Before creating a note, you should make sure that Notes is configured to use the proper file type. Read the previous section "Setting Up Notes" for details.

To create a note:

- Select **Log/Note...** from the menu. The *Create Note* dialog box appears.
- Fill in the appropriate information.
- Click **OK**. You are brought to the selected editor with the note file ready to be edited.
- When you are finished creating your note, select **File/Save** from the program's menu and close the program. The file is automatically attached to the folder as a note.



Enter descriptive information here for your note. This is used to list your note in its related folder.

Title This is the note's description, and should be unique to one single note.

Subject This is related to the note's topic. In the example above, the note is a map showing directions to a house. This is to be sent to guests for a party, so the subject is *Birthday Party*. There may be other notes under the *Birthday Party* subject, such as decoration lists, preparations to be made, etc.

Author This is the person who created the note.

Category Specifies a category for the note. Either select a category from the drop-down list, or type in a new name. Notes categories are the same for all folders, and are shared with Attached Files. In this case, the note is assigned to the *Directions* category.

Keywords These keywords can be used to search your list of notes. For example, if you have a note that contains directions to a person's office, you may want to enter *directions* and *office* as keywords. Then, when that person has 25 additional notes on file, you could easily locate this particular note by searching for *directions*.

Comments This free-form text field can be used to enter a more detailed description of the note.

File This displays the note's filename. It is for information only, and cannot be changed.

Application This shows which program is used to open and edit the file. If you wish to change the program, click the button on the right side.

Editing and Viewing Notes

To open an existing note:

- Highlight the note you want to open.
- Select **Edit/Edit record...** from the menu. The *Edit Note* window (identical to the *Create Note* window described above) appears.
- Make any necessary changes to the note's description.
- If you do not need to view the actual note itself, click **OK** to save your description changes.
- If you want to open the note, click **Open.** Your note file is opened in its assigned program.
- Make any necessary changes.
- When you are finished editing your note, select **File/Save** from the program's menu and close the program.

Note: Many Windows programs register DDE commands with Windows, This allows other applications to tell it to open and print files. When you have selected an attached note, all DDE commands registered by its associated program appear at the top of the **Edit** menu. Therefore, you can open most note files directly by selecting **Edit/Open**.

Deleting Notes

To delete an attached note:

- ♦ Highlight the note you would like to delete.
- ♦ Select **Edit/Delete** from the menu.
- ♦ If you configured Notes to ask for confirmation before deleting, a message appears asking you to verify that you do want to delete the note. Click **Yes**. Only the note's listing in DeskTop Set is deleted. The note's file still exists.
- ♦ A message appears asking if you want to delete the note's file. If so, click **Yes**. If you would like to keep the file, click **No**.

Attached Files

Address Book can maintain a list of files that are associated with individual folders. For example, suppose you write a letter to a person. You could attach the document file to the person's folder. In the future, when you want to view or edit that letter again, all you have to do is open the entry's folder, display the list of attached files, and click on the letter. Your Windows word processor is launched and loaded with that document. The same holds true for spreadsheet files, text files, graphics, etc.

To view attached files:

- ♦ Click the folder's ***Files*** tab.

Attaching a File

If you write a letter or fax using the Address Book or folder **File** menu commands, the resulting document is attached automatically (see the help files for details). You can also manually attach files that were created differently.

To attach a file using drag-and-drop in Windows 95:

- ♦ Open the DeskTop Set folder you wish to attach the file to.
- ♦ Locate the file you wish to attach in Explorer.
- ♦ Drag and drop the file from Explorer to the folder, **or...**
- ♦ Drag and drop the file to a folder's shortcut in Explorer.
- ♦ If the file was created with Microsoft Office, the document properties you saved with that file are copied to their related list counterparts (Title, Subject, Author, Comments, etc.). You may make changes to the *Attach File* dialog without affect-ing Microsoft Office's information.

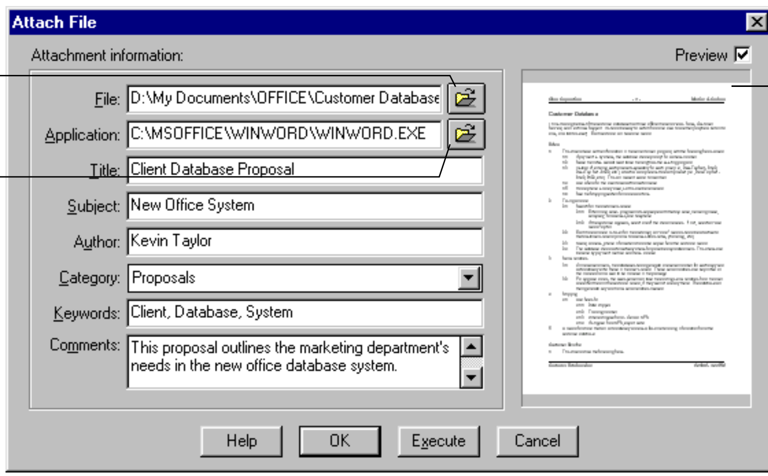
To attach a file using menu commands:

- Select **Log/Attach file…** from the menu. The *Attach File* dialog box opens.
- Click the button to the right of the *File* field.
- Select which file to attach.
- If the file was created with Microsoft Office, the document properties you saved with that file are copied to their related DeskTop Set counterparts (Title, Subject, Author, Comments, etc.). You may make changes to the *Attach File* dialog without affecting Microsoft Office's information.
- If the attached file's type is registered in Windows, the related program appears in *Application*. If the correct program does not appear, click the button to the right of the *Application* field and select the correct program.
- Fill in any other related information.
- Click **OK** to attach the file.

Click this button to select which file to attach.

Click here to change the associated program.

OLE-compatible files may be previewed here.



The information you enter here is used to list the attached file in its associated folder.

Attachment information

Option	Description
File	This displays the attached file's name. Click the button to the right of this field to select a file.
Application	This shows which program is used to open and edit the file. If you wish to change the program, click the button on the right side.
Title	This is the file's description, and should be unique to one single file (unlike *Subject* or *Category*, which can be used on multiple files).

Subject	This is related to the file's topic. In the example above, the file is a proposal for part of a new computer and database system. Therefore it and all files about the new system are given the subject *New Office System*.
Author	This is the person who created the file.
Category	Specifies a category for the file. Either select a category from the drop-down list, or type in a new name. Categories are the same for all folders, and are shared with Attached Notes. In this case, the file is assigned to the *Proposals* category.
Keywords	These can be used to search your list of notes. For example, if you have a file that contains a presentation for an upcoming meeting, you may want to enter *presentation* and *meeting* as keywords. Then, when that person has 25 additional files, you could easily locate this particular note by searching for *presentation.*
Comments	This free-form text field can be used to enter a more detailed description of the file.

Preview

Many OLE-compatible programs (such as Microsoft Office) give you the option to save a preview image with a file. Click this checkbox if you would like DeskTop Set to display that preview here. If no preview appears, the file you have selected does not support OLE-preview.

Button Functions

Command	Description
Help	Opens the help file to information about this dialog box.
OK	Saves your changes and closes the *Attach File* window.
Open	Opens the attached file in its related program.
Cancel	Discards your changes and closes the *Attach File* window.

Editing and Viewing Attached Files

To edit a file:

- Highlight the file you want to edit.
- Select **Edit/Edit record...** from the menu. The *Attach File* window appears.
- Make any necessary changes to the file's information.
- If you do not need to view the actual file itself, click **OK** to save your description changes.
- If you want to open the file, click **Open.** Your file is opened in its assigned program.
- Make any necessary changes.

- When you are finished editing your file, select **File/Save** from the program's menu and close the program.

Note: Many Windows programs register DDE commands with Windows, allowing other applications to tell it to open and print files. When you have selected an attached note, all DDE commands registered by its associated program appear at the top of the **Edit** menu. Therefore, you can open most note files directly by selecting **Edit/Open**.

Removing Attached Files

To remove an attached file:

- Highlight the file you would like to remove.
- Select **Edit/Delete** from the menu.
- A message appears asking you to verify that you do want to remove the file. Click **Yes**.

Removing an attached file from DeskTop Set does not delete or affect the file itself in any way. If you wish to delete the file as well, you must do this using the Windows File Manager or Explorer.

Reminders and Alarms

Reminders are used for events that you do not want to clutter your calendar's daily schedule. For example, you can create reminders for non-timed events such as birthdays and anniversaries, or set an alarm to remind yourself to pick up your child after work.

You can attach an unlimited number of reminders to each Address Book entry. Each of these is maintained in a standard, configurable list. This list can be easily scanned or searched, allowing you to recall any piece of information when you need it.

Although reminders are connected to Address Book folders, they are stored in a separate database. Reminder information from all of your Address Books is stored in this one file, which can be monitored independently by the Alarm Monitor. This means that, as long as the Alarm Monitor is running, you can receive reminders and alarms from any Address Book and folder without having that book open. For more information, see "Alarm Monitor" on page 243.

To view reminders:

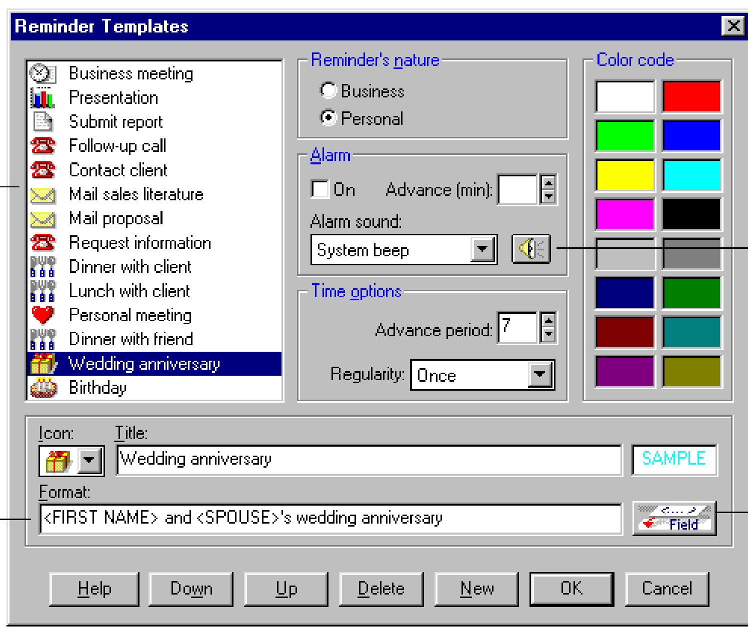
- Click the folder's ***Reminders*** tab underneath the toolbar.
- To view a specific type of reminder, select the appropriate filter tab at the bottom of the window.

Reminder Templates

Reminder templates simplify the entry of your reminder options by automatically filling in descriptions, alarm settings, and more. You may use the templates supplied with Address Book as is, modify them, or create your own to suit your particular tastes.

To edit Reminder templates:

- Select the **Schedule/Templates…** command. The *Reminder Templates* dialog box appears.
- Make the necessary changes.
- When you are finished editing the templates, click the **OK** button.



This is the list of available reminder templates.

Click here to configure alarm sounds.

This text becomes the reminder description. Keywords are filled in with corresponding entry information.

This button opens a list of available keywords you can use in *Format*.

You can create Reminder templates to suit your common events. Then, when you schedule a reminder, simply select the proper template and all relevant information is automatically filled in.

Templates list

The list box on the left displays all existing reminder templates.

Reminder's nature

Option	Description
Business	Specifies the type of reminder as business-related.
Personal	Specifies the type of reminder as personal.

Alarm

The *Alarm* options determine the alarm properties of the reminder.

Option	Description
On	Enables the associated alarm, if one is needed.
Advance	Specifies the number of minutes before the event time that the alarm sounds.
Alarm sound	Specifies which tune is used for the alarm.
Alarm sound setup button	Click here to configure and record alarm sounds. For more information, see the Reference manual.

Time options

This section is used to specify the reminder's date-scanning range.

Option	Description
Advance period	This value specifies how many days *before* the event you wish to be notified.
Regularity	This option allow you to indicate the recursion pattern for your reminder. *Once* means the event happens one time only. *Every year* schedules that reminder on the same date for every year, which is used for holidays, birthdays, and anniversaries. *Perpetual* means the reminder occurs every day.

Color code

You can associate a color with each template.

To assign a color:

♦ Click on the corresponding bar in the *Color code* area.

Icon

The Reminder icon for the currently selected template is displayed to the right of the template text line.

To select a new icon:

♦ Select one of the available icons from the drop-down list.

Title

This is the name of the reminder template. This is how the template is listed when you schedule a reminder.

Format This holds the actual template text, which is how your reminder appears in the folder's list. Enter event text and keywords in this field. When this event template is used to create a reminder for a record, the keywords are replaced by the associated information from the record.

Field Click this button to open a list of available keywords.

To insert a keyword in the *Format* section:

- ♦ Place the cursor in the *Format* section where you want to insert the keyword.
- ♦ Click the **Field** button.
- ♦ Select the keyword and click **Insert**.

Study some of the existing reminder templates for ideas on ways in which keywords can be used effectively.

Button functions

Command	Description
Help	This opens the on-line help file to the *Reminders Templates* topic.
Down/Up	Use the **Down** and **Up** buttons to change the position of the currently selected template in the list. You may want to put your often-used templates at the top of the list for quick access.
Delete	Use this button to delete the selected Reminder template from the list.
New	Use this button to add a new template.
OK	Click here to save your changes and close the window.
Cancel	Click here to discard your changes and close the window.

Entering and Editing Reminders

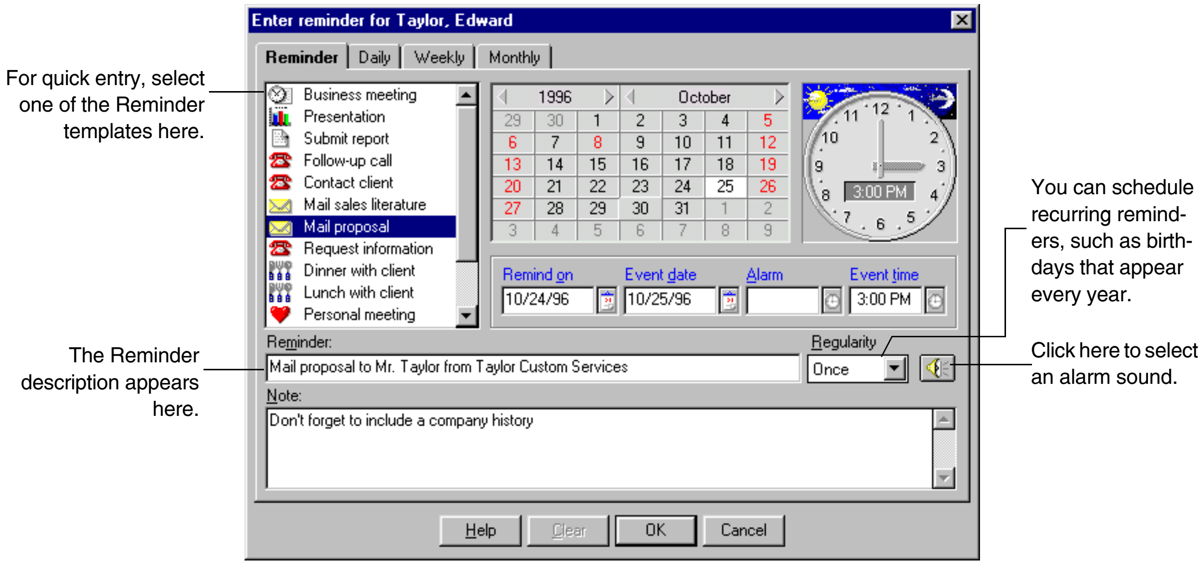
Reminders can be entered either from Address Book or from a folder. This means that you must first choose the entry to which you wish to attach a reminder.

Creating a reminder

To create a reminder:

- ♦ Select the Address Book entry for which you want to schedule a reminder (or open the record's corresponding folder).
- ♦ Select the **Schedule/Reminder...** command. The *Enter Reminder* dialog box appears.
- ♦ Choose an existing reminder from the list by clicking the desired template description, **or...**
- ♦ Enter your own reminder text in the *Reminder* field.

- Enter the event’s date.
- Enter the advance date in the *Remind on* field. This is the day you will be notified of the upcoming event.
- Enter the time of the event in the *Time* field (optional).
- Enter an alarm time in the *Alarm* field (optional).
- Enter free-form text in the note field (optional).
- Click the **OK** button to save the reminder and close the dialog box.



Schedule reminders that occur just once, daily, weekly, or monthly.

The *Enter/Edit Reminder* dialog box contains all of the important information regarding the reminder. This dialog box features a mini-calendar control, a clock control, and Reminder templates, all of which help you create reminders without ever touching the keyboard. The Clock and Mini-Calendar controls are discussed the Calendar chapter (see “Calendar Controls” on page 196).

Option	Description
Templates list	The list box on the left displays all of the existing reminder templates.
Mini-calendar	Use this control to select dates.
Clock	Use this control to set times.

Remind on	This field determines how much advance notice you give yourself for an event. Put the date of your earliest reminder here. For example, if you want to get a birthday gift on August 8th for someone's birthday on August 13th, enter 08/13/94 in the *Event Date* field, and 08/08/94 in the *Remind on* field.
Event Date	This is the date of the event.
Alarm	If you want the event to have an alarm, enter a time in this field. The alarm goes off on the date specified in the *Event Date* field, at the time specified in the *Alarm* field. Use the *Clock* control to enter the time fields with the mouse. For more information on this control, see "Clock" on page 197.
Time	This field holds the time of the event, and is optional. For example, a reminder for a birthday does not need a specified time, but a reminder for a birthday *party* does.
Regularity	This option allow you to indicate the recursion pattern for your reminder. *Once* means the event happens one time only. *Every year* schedules that reminder on the same date for every year, which is used for holidays, birthdays, and anniversaries. *Perpetual* means the reminder occurs every day. *Recurring* lets you define a more complex pattern using the ***Daily***, ***Weekly***, and ***Recurring*** tabs. You can set up a recurring reminder exactly as you do a recurring event in Calendar. For more information, see "Daily Recurring Event" on page 225.
Note	This can hold brief, free-form text about the reminder. For a birthday, you may put a list of possible gifts. If the reminder were about a business meeting, you could list the items you have to take with you.

Editing a reminder

To change a reminder:

- ♦ Highlight the reminder you would like to edit.
- ♦ Select **Edit/Edit record...** from the menu. The *Change reminder* dialog box, which is identical to the *Enter reminder* window, opens.
- ♦ Make the necessary changes, and click **OK**.

To mark a reminder as completed:

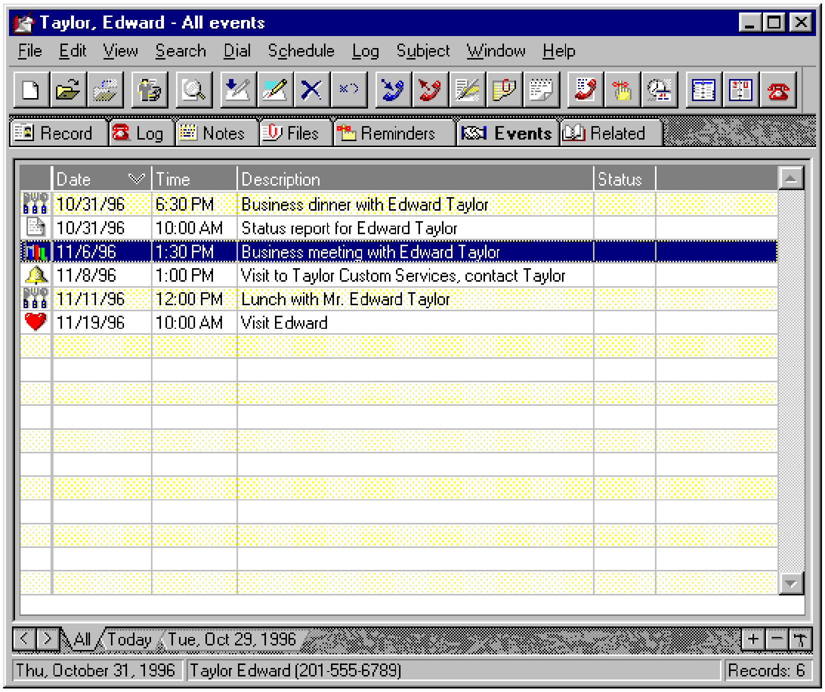
- ♦ Highlight the reminder that is complete.
- ♦ Select **Edit/Complete** from the menu.

Receiving reminders

If you have configured the Alarm Monitor to watch reminders, it sounds Reminder alarms at the dates and times designated. For information on using and configuring the Alarm Monitor, see page 243.

Calendar Events

The ***Events*** tab lets you view all Calendar events associated with an entry. You can use the filter tabs at the bottom of the window to view a specific date range, or a certain kind of event. If you need to edit or reschedule an event, simply double-click on it.



All Calendar events scheduled for Edward Taylor appear in his folder's Events tab.

To view a person's calendar events:

- Click the ***Events*** tab.
- Click the filter tabs below the list to sort out only the events you want to see.

To schedule an event:

- Select **Schedule/Event...** from the menu.
- Complete the *New Event* window and click **OK**.

To reschedule an event:

- Double-click on the event.
- Change its date or time by clicking the mini-calendar or mini-clock.

For details on scheduling events, please see the *Calendar* chapter.

Related Entries

DeskTop Set lets you view a list of Address Book entries that are related to the current folder. For example, if you want to see all employees that work at the same company, select the ***Company*** filter tab at the bottom of the screen. To see family members, select the ***Last name*** filter tab.

Using filter tabs

To view related entries:

- Click the folder's ***Related*** tab.
- Select the proper filter tab representing the relation you want to see.

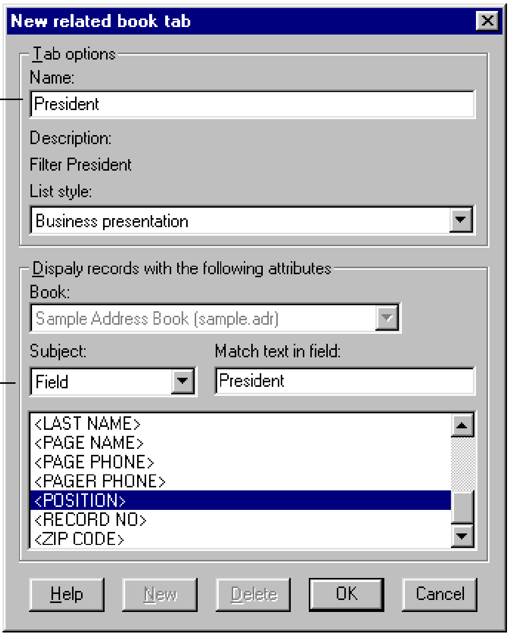
You can create your own filter tabs to show entries in a topic, group, category, or that share common information in a specific field.

To create a new filter topic:

- Click the + button in the bottom right corner of the folder window. The *New related book tab* window opens:

This is the name that appears on the filter tab.

Select whether you want to see entries with the same field, topic, category, or group.



You can create your own Related topics to see entries which have any common information.

- For *Tab name*, type the filter's description. (This description appears on the tab).
- Under *Subject*, select whether you want to see entries related by a specific *Field*, *Topic*, *Category*, or *Group*.
- Select from the list the specific field, topic, category, or group to use.
- Click **OK** to finish creating the new filter tab.

Tab name

This is the description that appears on the filter tab.

Subject

Option	Description
Subject	Select from this drop-down list whether you want to see entries related by a certain field, category, group, or topic.
Value	If you want to see entries that have a specific piece of information in a certain field, enter that information here. In the illustration above, the topic is set to show all entries whose *Position* field contains *President*.
Current	If you want to see entries that have the same information as the current folder in the selected field, check this box. For example, a folder whose entry's position is *Vice-President* shows all entries with *Vice-President* in the *Position* field. A folder whose entry's position is *Manager* shows all entries that have *Manager* in the *Position* field.
List	Select which field, category, group, or topic for which you want to see related information.

Button functions

Command	Description
Help	This opens the on-line help file to information about this window.
New	Creates a new filter tab.
Delete	Deletes this filter tab.
OK	Closes this window and save your changes.
Cancel	Closes this window and discard your changes.

To edit a filter tab:

- Click the tab you would like to edit.
- Click the button in the lower right corner.

To delete a filter tab:

- Click the tab you want to delete, click the button in the lower right corner.

Using the *Links* tab

In addition to the filter tabs, which relate records that have the same information in a particular field, you can also create a link between any two records, regardless of whether they have any information in common. This is useful for creating links for committees, golf outings, or for keeping track of who introduces you to whom.

To create a link:

- Open the person's Folder.
- Click the ***Related*** tab.
- Click the ***All*** filter tab below the list. Scroll through the list of entries (or use QuickSearch) to find the person you wish to link to this Folder.
- Drag-and-drop the person's name onto the ***Links*** filter tab.

To review a Folder's links:

- Open the Folder.
- Click the ***Related*** tab.
- Click the ***Links*** filter tab at the bottom of the list.