TeleMagic®

Business Success In Motion™

New Features TeleMagic V5

Activity Browse

The Activity Browse list will now start at the current day, rather than at the first activity on the list. If there are no activities for the current day, it will start on the next day that has an activity.

Calendar Layout

The two Activity Manager toolbars have been consolidated into one toolbar, and the tools used to configure the layout of your calendar have been moved. A new *Layout* selection has been added to the Activity menu.

Custom Activity Icons

A *Customize Icons* item has been added to the Activity menu. This feature allows you to customize the icons that are associated with each type of activity. You can have a different icon for every activity type that you add to the Type list box. Each icon must be 13x13 pixels and 16 colors. A radio button related to this feature has been added to System Preferences. If this is set to Global, the custom activity icons will appear on all users' calendars. Adding and changing activity icons will be limited to supervisor users. If it is set to User, individual users will be able to configure their own custom activity icons.

Activity Duration

A drop-down list has been added to the Duration field in the Activity dialog box. You can use this to more easily enter activities with long durations. The duration will be displayed in the selected increment when you first add the activity, but stored internally in minutes. Once you have saved the activity, in the future the duration will be displayed in minutes.

Last Recurring Activity

The last Recurring Activity in a series now has a note in the description informing you that it is the last one in that set.

Reserved Resources

When adding an activity and checking availability, if a resource is reserved, the user ID of the user reserving it is displayed in the appropriate column.

Change Activity User

A new option for *Change Activity User* has been added to the Activity menu. This will enable you to change the user whose calendar you're viewing by using the keyboard. This option is only available if the Activity Manager is open.

Navigating the Calendar Views

The four arrow buttons on the Activity Manager toolbar have been removed, and replaced with two new left and right arrows When clicked, these buttons will page through the month view one month at a time, the week view one week at a time, or the day view one day at a time. Support has also been added for the key combination Ctrl+Left Arrow and Ctrl+Right Arrow, which operate as the arrow buttons on the toolbar. Using the arrow keys by themselves operate as they did in previous versions, moving through the month, week, and day views one day at a time.

Go To Contact

A *Go To Contact* button has been added to the Activity dialog box. When you are adding or editing an activity that is linked to a contact, this button will take you to that contact in the Contact Manager.

Activity Refresh

A *Refresh* option has been added to the Activity menu which will update the calendar when this option is selected.

Activity Toolbar On/Off

A *Toolbar* option has been added to the Activity menu. This allows you to toggle the Activity toolbar on and off.

Pending Activities List to Front

When a call is started from the Pending Activities list, the list will be brought to the front when the call is saved.

Maintain Position in Pending Activities

When an activity is edited from the Pending Activities list, after completing the edits you will be returned to the position of that activity in the list.

Select Level to Add Record

When a record is added in TeleMagic, a dialog box appears that allows you to select a level. You can now use Alt+1, Alt+2, and Alt+3 from this dialog box to select the desired level.

Save Browse Window Size

When Save Settings is clicked in Browse, the window size and position are now saved as well.

Calculation Efficiency

The technique used to process calculations in calculated fields has been improved. Improvements are most notable in databases with large, complex calculations.

Contact Button in Call Notes

If a call is started from one contact, and you then move to another contact in the Contact Manager, the Contact button in Call Notes will return you to the contact from which the call was started.

Faxes in Linked Documents Rollup

In the Linked Documents rollup, on the Merged Documents page, fax documents are now identified by the subject of the fax.

Associated Files

Files can now be associated with contacts. An option for *Associated Files* has been added to the Rollups portion of the Current Record menu. A button has also been added to the Contact Manager toolbar. From Associated Files rollup, you can add or remove files in the list, or open the file using the associated application.

Adding an Item to a List Box

After an item is added to a list box, the new item is highlighted rather than the first item in the list.

List Box Field

A line under the title bar of list boxes indicates from which field the list box is being read.

Spell Check Hotkey

The hotkey combination Ctrl+S has been added to the right of the Spell Check option in the Office menu.

Duplicate Record Message

When a user tries to add a duplicate record, a message appears to inform the user of the duplicate. This message has been expanded to include the Company, Contact, Address 1 and 2, City, State, ZIP, Phone, and Fax key fields from the first matching duplicate record.

Viewing the Path of a Synchronized Database

In the Select Database dialog box in previous versions, clicking the Change button for a synchronized database displayed a message stating the database could not be changed. You are now able to open the Change the Database Name dialog box for synchronized databases, allowing you to view the path to the database directory but not to alter the database name.

Replying to Linked Message

If you reply to a message that is linked to a contact, the copy of the reply that is located in your Sent folder will be linked to that contact as well, and the e-mail will be shown in the e-mail rollup for that contact.

Pipe Character in E-mail Address Field

If a pipe character (|) is placed in an e-mail field, you will not be allowed to send e-mail to that address, either locally, locally in a filter, or in a filter to the Automation Server. This is based on the behavior of the same character in fax fields.

E-mail Link to Outlook

Microsoft Outlook is now supported. You can use your TeleMagic databases as the source for merge fields. There are setup procedures for both Outlook and Enterprise, which must be completed to use this feature.

Text Changed in Options

In TeleMagic Preferences, the text "When using Goto based on the email address, look for contact in:" has been changed to "When using Lookup Contact, look for contact in:"

Message Type in E-mail Rollup

E-mail rollups now include a column that indicates whether the message is Incoming, Linked, or Outgoing.

Default Call Result in Dialer Preferences

A field for *Default Call Result* has been added to Dialer Preferences. This option determines the contents of the Call Result (Status) field in Call Notes. The Dialer Preferences screen has also been redesigned, and hotkeys were added to those options that did not have them.

Remove "Complete Activity" from Call Notes

A check box has been added to System Preferences for *Hide "Complete Activity" in Call Notes*. If it is marked, the *Complete Activity* check box will not appear on the Call Notes screen. This has the affect of call tracking activities always being completed.

Read Records when Filter is Selected

A check box has been added to Database Preferences for *Read Records when Filter is Selected*. When this check box is marked, TeleMagic will use Rushmore technology to find all of the records in a filter at the time you select the filter, instead of locating the records as you navigate the database. This can cause a delay at the time of filter selection, but will eliminate the delay experienced when moving between records and scrolling through Contact Browse.

Enable Activity Permissions

In System Preferences, a check box has been added for *Do not grant full access to new users*. If this check box is unmarked, all new users will automatically be granted full access to all other user's calendars. If it is marked, you can specify the default access for new users. When a user is added, all existing users will have the new user added to their permissions with this level of access. All existing users will also be added to the new user's permissions at this level. The default is *No Access*. A check box has also been added to Activity Preferences for *Allow all users Full Access to your calendar*: If *Do not grant full access to new users* is not marked, this option and *Allow all users Group Scheduling rights to your calendar* will be unavailable.

No Duplicate Records

In Database Preferences, a check box has been added for *No Duplicate Records*.
This feature uses the existing duplicate record checking index. If this check box is marked, and a user tries to add a duplicate record, they will not be able to save the record until the duplication is corrected. The user will be able to cancel the adding of the record.

New Security Interface

The Security interface has been redesigned. At the System Level Security screen, you can add, edit and delete Security Groups. Here you grant the security group access to global options such as Rebuild and Preferences. To specify which databases are available to the group, click the *Current Members* button.

Selecting Databases

In the Select Database dialog box, TeleMagic will now display only databases to which the current user has access.

Expression Builder Focus

When the Expression Builder opens, focus will default to the text box instead of the field list.

Expression Builder: Tables Drop-down List

A *Tables* drop-down list has been added to the Expression Builder. This list will display the available tables from which you can select fields for your expression. For example, when creating an expression for a calculated field, the drop-down list will show the contact tables; when creating an Activity rollup list in the Screen Designer, the activity table will appear in the drop-down list.

Filters: Analysis

When you click the Analyze button in the filter selection dialog box, the filter that was highlighted in the list of filters will also be highlighted in the Available Filters list when the Select Filters to Analyze window opens.

Don't Display Filters and Indexes

In Filter and Index setup, a check box has been added which allows you to disable the display of these items in the Contact Manager and Custom Reports. To access this check box in filters, select Edit Filters from the Contact Utilities menu, highlight a filter, and click the Change button. To access this check box in indexes, select Edit Indexes from the Contact Utilities menu, highlight an index, and click Change.

Holiday Maintenance

The Holiday Maintenance feature is now limited to Supervisor users only. If a user is not a member of the Supervisor security group, the menu option will be unavailable.

Import: Confirmation Message

When you double-click an import format, a confirmation dialog box appears. The format name, path, and file name have been added to this message.

Initialize All Records in Filter

In Enterprise's Record Initialization dialog box, there is now an option to initialize all of the records in a specified filter.

Screen Designer: Drop-down Lists

A check box for *Dropdown List* has been added to the Field Properties dialog box in the screen designer. When this option is marked, the field becomes a drop-down list on the Contact

Manager. The contents of the drop-down list are taken from the field's list box. You will not be able to change the properties of the list box once the field is configured to be a drop-down list. If a change to the list box is required, you could temporarily change the properties of the field, or you could have the same field appear on another page as a normal field and change the list box from that page.

Screen Designer: New Toolbar

The buttons on the Screen Designer control bar have been changed to the standard toolbar size. The Order button, Show Grid, and Snap to Grid options are no longer available on the toolbar.

Screen Designer: Open Field Properties

In the Select Field dialog box, a check box for *Open Field Properties* has been added. This is marked by default. If it is marked, when you add a field to the screen the Field Properties dialog box will open. If it is not marked, the Field Properties dialog box will not open when you add a field. TeleMagic will remember this setting even if the Screen Designer is closed.

Screen Designer: Buttons

User-defined buttons can now be placed on the Contact Manager screen. Clicking the new Button tool on the Screen Designer toolbar will open the Button Properties dialog box. You can use text on the button, or a graphic. If you select a graphic, you will have the same alignment choices that are offered when adding a picture on the screen. The Button Type can be either an external program or function key. The button can be sized on the screen.

Screen Designer: PageFrame

The PageFrame feature enables you to have five rollups on the screen, each on its own tabbed page. To place a PageFrame on the screen, click the PageFrame tool and then click on the page. Click one of the List buttons on the right to open the List Properties for that page.

Screen Designer: Default View and Page for Contact Rollups

In Contact Rollup List Properties, an option for default View and Page has been added. When the *Select Default* check box is marked, the *View* and *Page* drop-down lists become available. The views and pages listed are based on the contact fields selected in the Display expression. When you double-click on a record in this rollup in the Contact Manager, you will be taken to the view and page selected here.

Automation Server Colors

The colored highlights in the Automation Server have been removed. Instead, the color of the text in the Status field is changed.

Message Taker: List of Users

The list of users in the *For* drop-down list now includes the current user. *Notify* and *Password protect* will work the same for the current user as they do for other users.

Message Taker: Link to Contact

When you link a message to a contact, the *From* field will be filled in with the Contact key field, the *Company* field will be filled in with the Company key field, and the *Phone* field will be filled in with the Primary Phone key field. If there is already data in these fields, they will not be changed.

Standard Reports: Activity History and Pending Activities

An option for Linked Activities Only has been added to the Activity History report. When this option is marked, a drop-down list is enabled that allows you to include only activities linked to a specific database, or to all databases. The same check box and drop-down were also added to the Pending Activities report, and this screen was redesigned as well. The tab order on both of these dialog boxes has changed.

Standard Reports: Selecting Type and Status in Activity History

The method used to select a Type and Status in the Activity History report has been changed. When the *Selected Types* radio button is selected, the *Select* button becomes available. When you click the Select button, a mover dialog box will appear, allowing you to choose individual activity types to include in the report. Similarly, marking the *Selected Statuses* radio button and clicking the Select button will allow you to pick individual activity statuses.

Standard Reports: List Box Report

A line has been added to the List Box Report for *Use list from other field*. If the field does not use a list box from another field, this will read “No”. If the field does use a list box from another field, the field name is given.

Custom Reports: Default to Current Contact

When you print a custom report, TeleMagic will now check to see if the report has been assigned a filter and index. If there is no filter or index selected for use with the report, the default will be to print the report for the current contact only.

Word Processor: New Merge Fields

Two new merge fields have been added to the merge field list: *User Name* and *User ID*. These directives pull from the cUserName and cUserID variables in Enterprise.

Synchronize Sales Forecasting

There is now an option in Site Preferences for *Synchronize Sales Forecasting*. Synchronization of sales forecasts follows the same rules as activities. In Enterprise, there is an option on initialization to include linked sales forecasts.

Synchronize Custom Reports

There is now an option to synchronize Custom Reports. When selected, the user can choose which custom reports to synchronize. This option is available from Database Preferences under Database Files to Transfer. This option is set at the Central and Satellite sites.

Synchronize Database Documents

There is now an option to synchronize database documents. The user can select the document(s) to be synchronized, and will be warned when attempting to synchronize documents with duplicate names. This option is available from Database Preferences under Database Files to Transfer. This option is set at the Central and Satellite sites.

Initialize All Records in Filter

As noted in the Utilities and Maintenance chapter, in Enterprise’s Record Initialization dialog box, there is now an option to initialize all of the records in a specified filter.

Viewing the Path of a Synchronized Database

As noted in the Contact Manager chapter, in the Select Database dialog box in previous versions, clicking the Change button for a synchronized database displayed a message stating the database could not be changed. You are now able to open the Change the Database Name dialog box for synchronized databases, allowing you to view the path to the database directory but not to alter the database name.