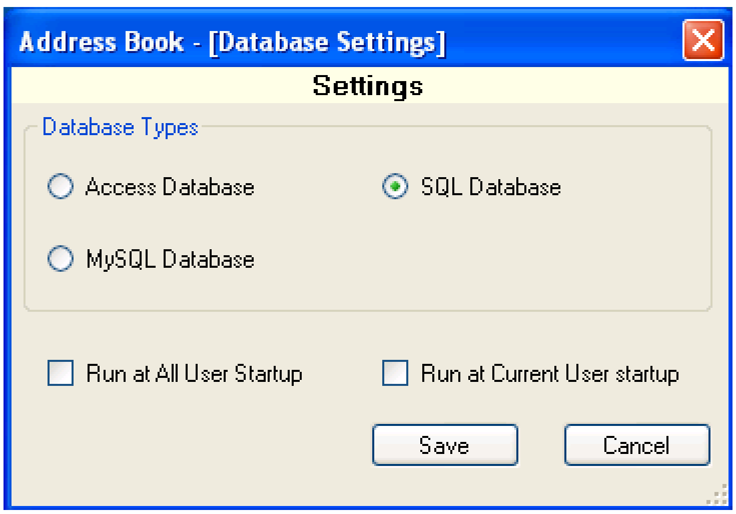
Database Settings

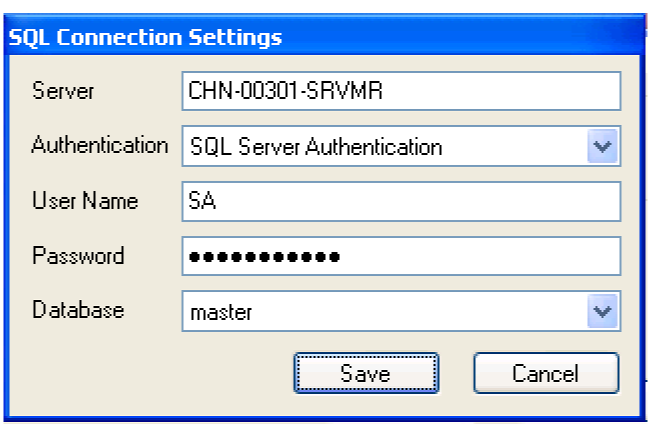
This application requires a database connection to store the contact information. The database must be either MS SQL Server or MS Access (*.mdb) database. When the application is started for first time following message box will be displayed weather to set the database connection or not.

Click yes in the preceding figure, so that the Settings form will be displayed as shown in the following figure.



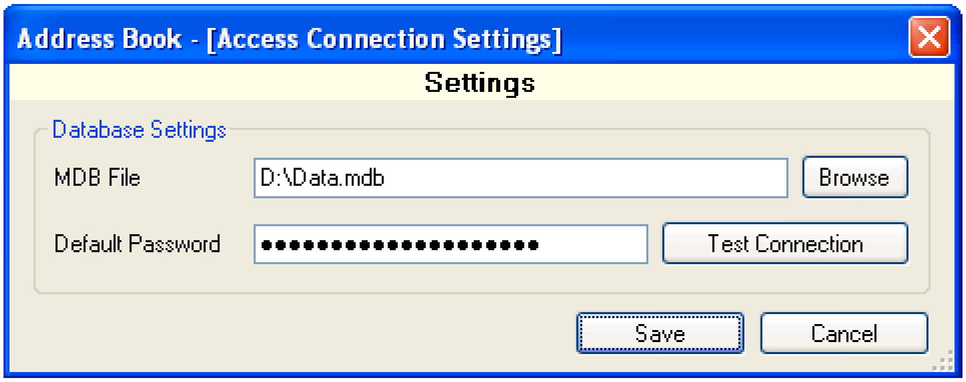
In this form select the database type which you need to be used for storage. Use the check box to start the application automatically at system startup. Click save button. Then the Database connection form will be displayed according to your selection.

SQL Database Settings:



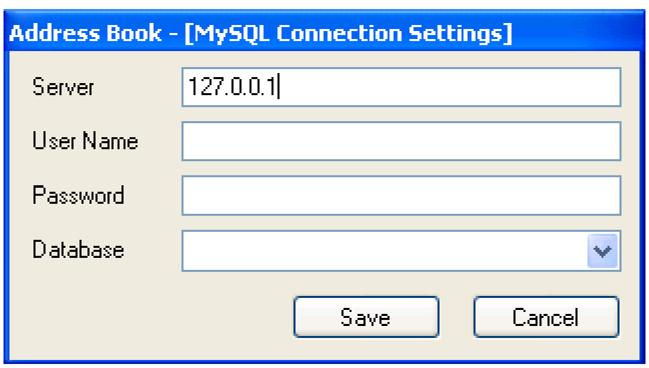
In the preceding form type the Server name of the SQL instance installed and then selects the mode of authentication weather to use Windows Authentication or SQL Server Authentication (requires username and password). If the information's supplied are correct and if the connection to the database could be established, then the list of database available will be shown in the list. Select one from them and then click Save button.

Access Database Settings:



In the preceding form select the MS Access Database file (*.mdb) by browsing the system and then type the password of the database if any and then click Save.

MySql Database Settings

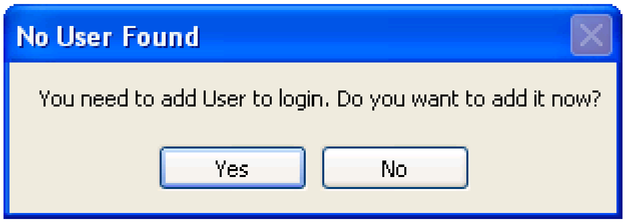


In the preceding form type the server name where the database is installed (127.0.0.1 in case installed in same system) and the username and password if required and then select the database from the list. If the database is not displayed then the application couldn't connect to the database. Then check to see weather the inputs provided is accurate. Then click the save button to save the changes.

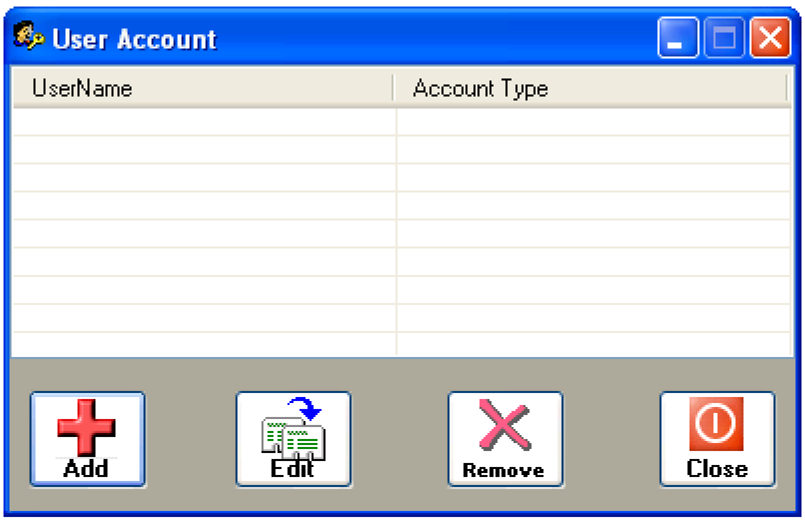
When the selection of database is over the application will restart to apply the settings and to connect to the database.

When the application restarts the application will minimize to tray. Click on the tray icon and click Login or Contacts.

First time Login:



As this program requires user credentials to login, and the credentials dose not exist for the first time it will ask to create a new user. To create new user click on Yes button at the displayed dialog box. When you click the Yes button a form provided to manage users will be displayed as in the following figure.

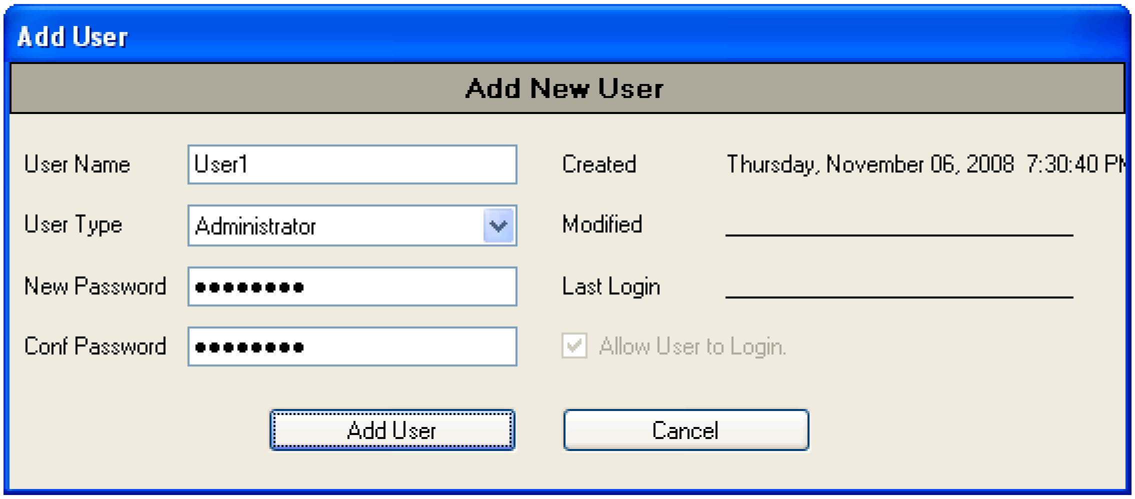


In the preceding form the grid displays the users list and their account type weather Administrator or Limited User.

Administrator: This type of account has full rights over the application like creating, editing, removing users. It can also change the password of other users and also view the contacts of other account however cannot edit or delete them. Their must be at least one user with administrative rights.

Limited User: This type of user cannot access user account. But can change their own password using the option provided. The contacts added by this type of users are available for the administrator account but the contacts added by other accounts cannot be viewed by this account other than shared contacts.

Add New User: Click on the Add button (First Button) to add new user. The form to add new user will be displayed as shown in the following figure.

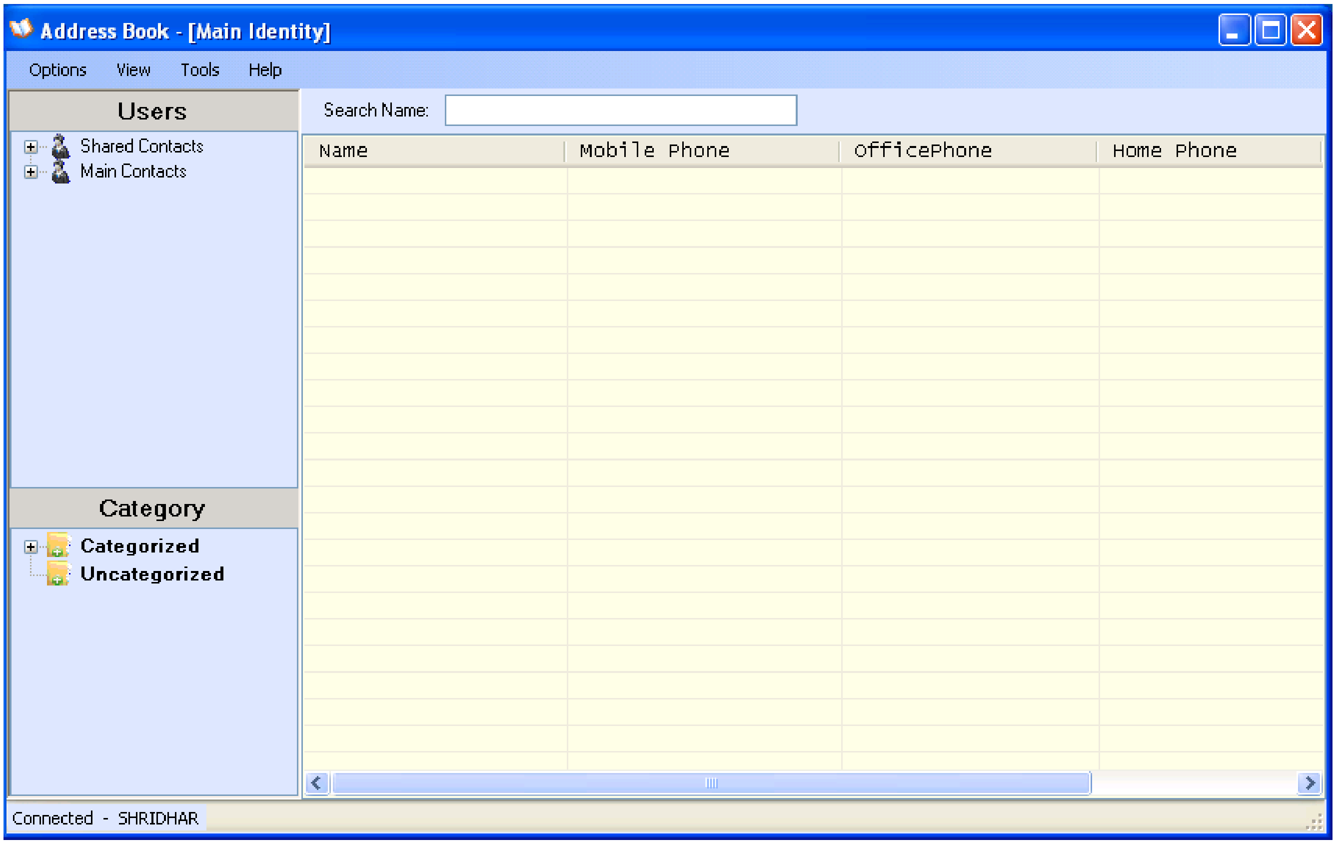


In the above form type the Name of the user, type of the account and the password. Then check the check box provided which is used to allow the user to login, where this functionality can be used to restrict a user from logging in without deleting the account. When editing the account this form also displays the details about the user like when he had created the account, when the account has been last modified and when the user had been logged in at last. Click Add User button to add the user. Then the user will be added to the User Account.

Follow the previous steps and add users as much as needed. Then click the Close button (fourth button) to save the changes and then the Login form will be visible as shown below.

In the Login form type any of the User Name and the Password to login and view, add and edit the contacts.

Contacts Form:



Above form displays the list of contacts added by the current user. To view the contacts of particular user select the user name shown at the left panel and then double click the category from the left panel. Limited user can view only their own contact and the contacts shared by other users as previously mentioned.

The contacts saved are broadly divided into two groups one is Categorized and the other is Uncategorized. All the categories which doesn't come under any category is placed under Uncategorized and all the new contacts added comes under this category. To categorize the contact just select the required category and right click on it and then click New → Contact which will place the contact under that category.

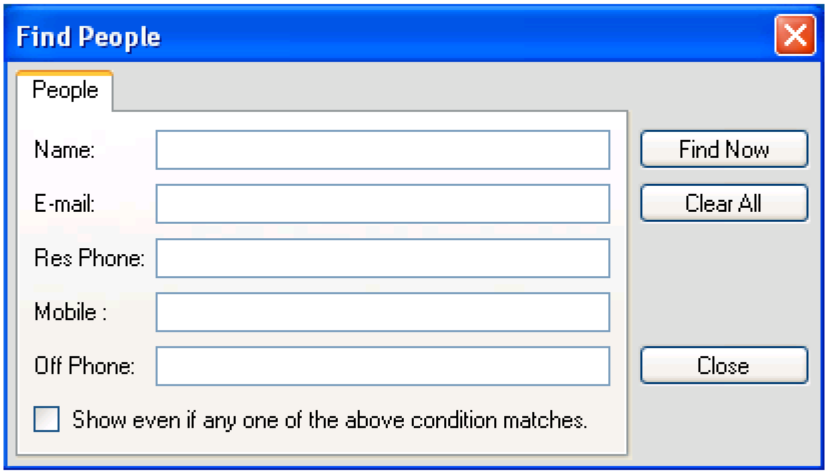
Add New Category: To add a new category select the Categorized group from the left panel and then right click and then click New → Category new category will be added to the list and you will be asked to name it which won't accept the default name. These categories can be nested and is unlimited. You cannot add a category with the same name already added under the same group.

Add New Contact: Click Options → New Contact (Shortcut: Press Ctrl + N) and then type in all the details in different categories separated in tabs such as Name, Home, Business, Personal, and other. This form looks similar to Windows Address Book - New Contact. Type all the details about the contact and click on the Save button to save the contact. Continue adding all the contacts. The above form will be populated with the contacts as and when ever you add. If not click on the View → Refresh or just press F5 key on your keyboard to populate the list.

Edit Existing Contact: Select the contact you need to edit and click Options → Edit Contact (Shortcut: Press Ctrl + O) and the same form to add contact will be displayed. Here update what ever you need to and then click Save button to update the contact.

Delete Contact: Select the contact you want to delete and then click Options → Delete Contact (Shortcut: Press Delete). It will confirm weather to delete or not select your choice so that the action will be performed.

Searching for Contact: To search for a contact click Options → Find People so that the below form will be displayed.



In the above form type the one or some of the fields to search for and click Find now. Select the check box below to display all the contacts with matching criteria of any one.

Data Backup: View the Backup Data section provided below.

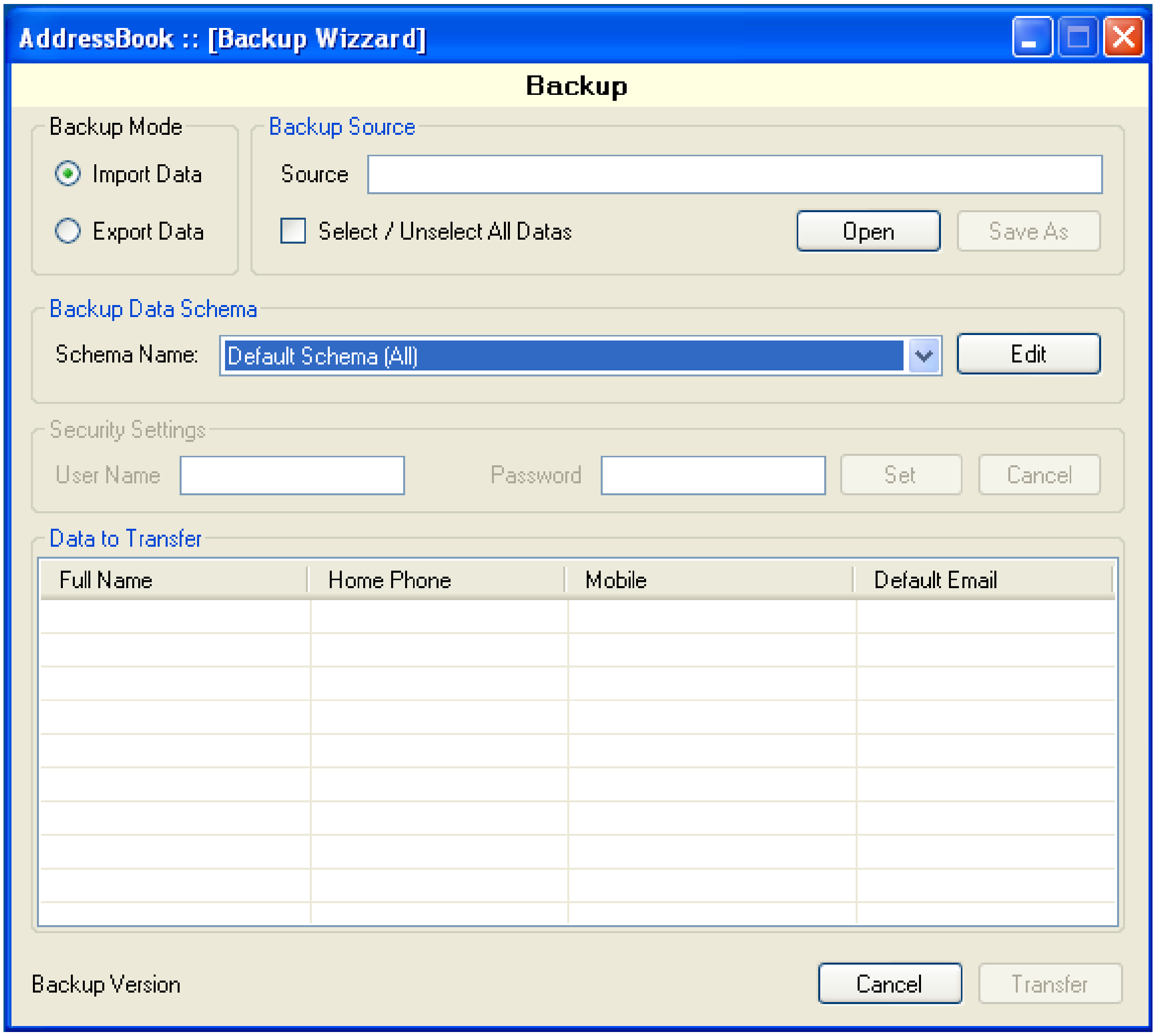
Adding Reminders: To add Reminders click Options → Reminder →.Add Event. In the Add Reminder form type the required details. The reminder will be displayed in Contacts form itself. It can be shown or hidden by selecting View → Reminder.

Change Password: To change the password of current user click Tools → Change Password and type in the old password and new password. To change the password of other users click Tools → User Account and do the same thing as did at the first step. Only Administrator account can change the password of other users.

Changing Settings: To change the settings click Tools --> Settings.

Backup Contacts:

This is a functionality to backup entire or selective contacts from the list of your contacts. Click on Options → Transfer Data so that backup form will be displayed as shown in the following form..



In the above form select the details required using the below guide lines.

<u>Backup Contacts:</u>

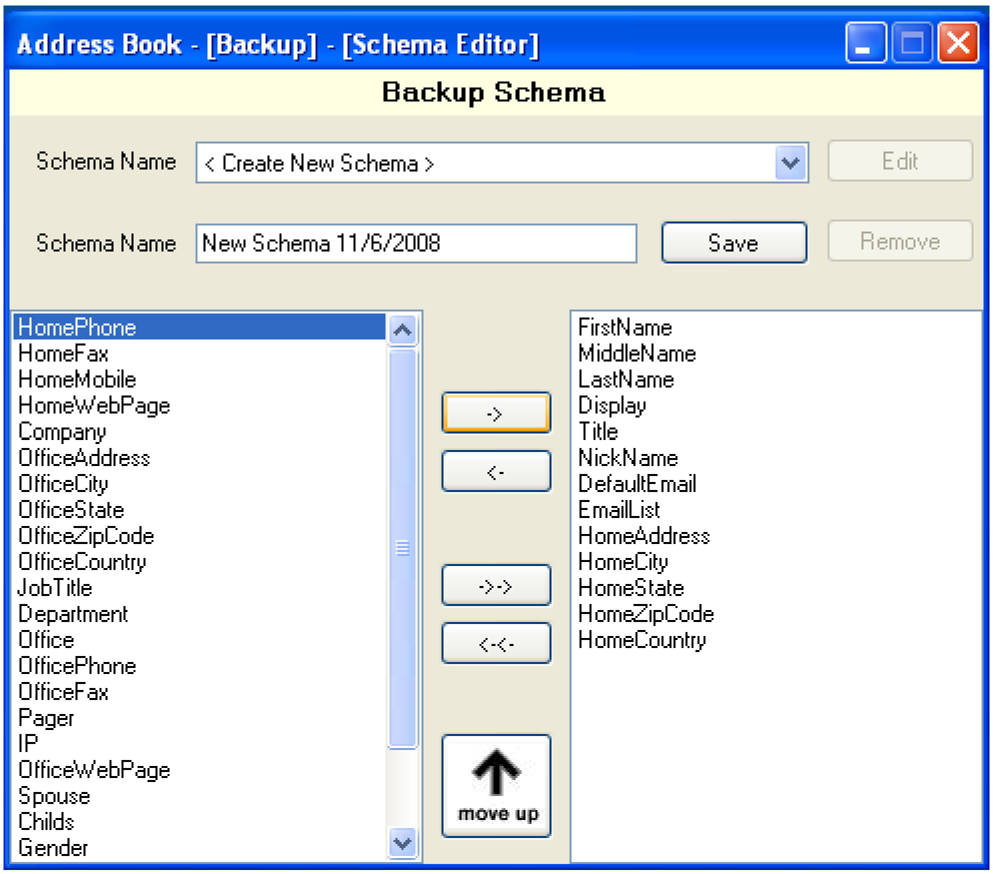
<u>Create Backup:</u> To create a new backup select the Backup Mode as Export Data which enables Save As button. Click the Save As button and select the type of backup weather as XML (Details Visible) or COB Backup (Encrypted, Password Protected). Then Select the schema, to select which details of the contact can be added to the backup. To know more about schema read the Edit Schema section provided below.

If you had decided to create a COB Backup then the Username and Password fields will be enabled. Type in the required Username and Password and click the Set button. Then select all the contacts from the list which had to be added to the backup. Now you have done, finally click on the Transfer button to create a backup file.

<u>Restore Data from Backup:</u> To restore the backup select the Backup Mode as Import Data which enables Open button. Click the open button and select from which type of backup to restore data and then select the file. If you had selected COB Backup file as source file and if it is password protected type in the user name and password and click the Set Button. If your User Name and Password is correct the contacts in the backup will be visible in the grid. Select all the contacts which you had to restore and then click the transfer button. Now you have done. Your data are restored.

Using Schemas

Schemas are used when you need to backup only particular details of the contact. You can create, edit and delete your own schemas using the functionality provided for the convenience. However you cannot edit or delete the schema created by other users or the default schema already in the list. To add or edit schema click on the Edit button near the schema name on the Backup Wizard displayed above. So that the below form will be visible.



The above form is the schema editor.

<u>**Add New Schema:**</u> If you want to create new schema from the drop down list of Schema Name select < Create New Schema > so that Save button will be enabled. Then type the schema name in the second schema name box. The list shown in the left side is the total details which can be entered by the user. Just select the details you want to add to the backup and click the -> button to add it to the list at the right side which is the list of details to be added. I think I need not explain other four buttons which is usual in most of the applications. Finally click on the save button to save the schema. Now you can select your schema from the list of the schemas in Backup Wizard.

<u>**Edit Existing Schema:**</u> To edit the schema select the schema from the list which you had to edit so that Edit button will be enabled. Make the necessary changes and click Save button. Note, Editing the schema makes the backup created using the schema unusable (However you may change the name of the schema).

Delete Schema: Select the schema from the list and click Remove button so that the schema will be removed.

Miscellaneous Functions:

Share Contact: To Share an existing contact select the contact and Right Click → Actions → Share Contact.

UnShare Contact: To Un Share a shared contact select view it in a shared contact list and Right Click → Actions → Un Share Contact.

Move Contact between Categories: Just select the contact(s) from the list, right click and then click Cut from the menu. Then go to left panel, select the category to which it had to be moved, right click and then click paste from the menu.

Calling: To make a call to phone number through your dialup modem select the contact Right Click → Actions → Call. A new form will be opened with to select the phone no and call.

Printing Contact: To print the contacts click Options → Print Contacts and then below figure will be displayed.

In the preceding figure select all the contact listed and then select the type of print you need to perform namely in tabular format (Horizontal) and Bio-Data format (Vertical) with or without border lines. Then select the schema for the details to be printed. Only the columns listed in the schema will be printed. Then click the save button at the top left corner and then save the print file as webpage. Then open the file saved which will open in your default browser and then you can adjust the layout and you can print from the browser.