## Action – Client list

This form is used to perform an action on the selected clients:

- Generate a client list for a mail-merge operation with a word processor
- Modify at once the contact date for all selected clients. For example, modify the contact dates for the clients which were sent a mailing
- Modify at once the last client state. For example, after a mailing, the client state may be “Waiting for reaction”. For the clients that showed no reaction, you may modify at once the status in “No reaction” or “To call again”
- Print all the contacts of the selected clients
- Add a new contact for the selected clients (for example, after a mail-list generation, insert a contact “mail sent”, and set the “call again” time limit)
- Generate an E-mail mailing

### Notes

A free commentary for each action

### Contact type

You choose a contact type. All contact type were set-up previously in the “configuration” form

### Mailing date

NINO suggests the current date. You can modify it

### Retry shortcuts

This area is used to choose directly the same retry time for all the clients selected.

### Contact date

In this area you may specify a precise date to recall the clients.

### Link

With this button you command the generation of a mailing information (the “T Mailing” table) file. The software will ask you if the mailing information has to be added as a contact. You may specify the call again time. Nino will set this date for each contact. **To add contacts**, you have to indicate the new state for the selected clients, before asking for this command. Once the contacts are generated, this status will be stored and suggested for other mailing in the same software run. Nino also generates the **NinoMail.txt -** text-mailing file, see below.

### Text

With this button you command the generation of a text-mailing file - **NinoMail.txt**. The first record contains the fields’ names. The file format is « Word Mail Merge ». **Attention**: this file can not be generated (an error will be notified) if have already activated your document that uses NinoMail.txt as merge information. You must generate the NinoMail.txt before activating the linked document (or close temporarily that document). For example, if Word is already open with **NinoMail.txt** document, there will be an error message. You have to close the NinoMail.txt document in Word, before generating a new one.

If the case “STD” is checked, the generated text file conforms to Microsoft’s mail-merge specifications. If this case is not checked, then the format of text file is as follows: field separator: “TAB”, no quotes for text delimiting. To know the field- names that are available, do a test output in mail-merge format. The first line contains the field’s names.

### Names and contacts

Print a report with all selected clients. This report is ordered by client and by contact time

### Selection

You select the contact category that will be printed.

**Time to contact**

With this button you command the contact date for all the current client selection. The new contact date is displayed in the “Time to recall” field.

**Change of the last status**

With this button you change the last status of the clients in the current selection.

**Messaging**

With this button you activate the form to generate at-once multiple Emails.

## BACKUP

To preserve against system crashes, you have to **backup regularly** your Nino software (we suggest – each day) – program and data.

## Compacting the data

After some data deletions, the information base may contain unused area. The compact action eliminates these areas, thus reducing the database size.

You compact Nino-Contacts data using a command in the “Configuration“ menu. To compact the executing application (Nino Contacts itself), you use the compact shortcuts generated at program installation. This shortcut may also be added to a toolbar. The compacting action is executed outside Nino use.

## Compacting, repairing data

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When the software has some obvious malfunctions, you can try the “Compact- repair “ shortcut. This shortcut may also be added to a toolbar. The compacting action is executed outside Nino use. **IF YOUR DATA IS IMPORTANT, DO MAKE REGULARLY DATA BACKUPS.**

## Contacts Chronology

This form shows the contacts associated with a name.

The «contextual menu » helps order this view in various ways. For example, if you point on the "weight" area, you can order this list in weight's ascending or descending order.

You can change the labels of two areas in the form presenting each contact, if you double-click in the « ***Info P1*** » or « ***Info P2*** ».

### Command Buttons

**Hypertext**

NINO positions the cursor directly in the hypertext field of the current recording

**Display**

Change the display mode for the current contact

**Add a document**

NINO helps set up an OLE link with a document

**Save**

Save the modifications. **Note*:*** Any modification is automatically saved when the form is closed (when you leave it). Any modification that is not yet saved can be canceled with the ESCAPE key. The "save" command saves immediately any modification, so it can't be canceled any more.

To **insert** a new contact, you set the pointer in a new line of the form "Current contacts" and you enter your contact information. The default values for the controls: "Client state" and "Contact type" may be modified by clicking in their fields and choosing other values. To have other choices, you have to use the **configuration** form.

In the field "Topic" you may select a current topic of this name, or another text. To define new topics for a name, you have a command available on the "Names" form.

To **delete** a contact, you select it (click on the selector area), and then you press the DEL key.

The « Document » field may contain OLE references to an associated document. This reference may be added with the "Add Document" button or with the contextual menu.

Another possibility to link documents is to use the "Hypertext" link. You can write in this area after selecting with the "Hypertext" button, or with the contextual menu (mouse – right button).

The upper area of the form presents the client's phone numbers that can be used by the automatic dialer.

The client's details may be showed with the "Detail" button

**Note**: When you leave this form, Nino-Contacts sets the last contact status as the current client status.

### Differences between the OLE and the hypertext links

An OLE link provided a document preview. A hypertext link may refer to a page on Internet.

### Use of the Intellimouse ™ mouse

This mouse brings a great comfort. With the wheel you can explore clients and contacts. To use this feature, the cursor has to be in a client definition area (name, telephone, etc.), on the upper area of the form. *This function is not available if the cursor is situated in the contact area and the latter is in tabular format.*

## List names

This form helps define the list names that appear in the search criteria.

## Names in the company

This form shows all the names belonging to the same company.

You can jump directly to one of these names. If you do that, the current client selection will be replaced by the list of clients in the company. So you can parse all the names in the same company and their contacts.

## NINO - Parameters

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Various forms present the specific configuration parameters. As a general rule, after modifying a parameter, you have to close the form and open it again to see it in the new order. To close a form, you use the (X) button.

## Search result

This form shows the result of the search using the selected criteria.

The contextual menu allows you to order this list according various views (for example, you click in the weight zone and order the list in ascending or descending way).

A double click in the « Name » field starts the « Name » form. A double click in the « Company » field » starts the « Company « form.

You may perform a quick selection of the names to contact today, tomorrow, in seven days. The case "New" allows you to select only the contacts starting today. If this case is unchecked, your selection shows also the names that had to be contacted before today.

You can filter the display, by name or by company, with the right buttons. Attention: this is only a display selection. If you are doing a mailing, this local filter is ignored.

To change some information concerning the clients you have to authorize the modifications ( « Change » button).

**Details**

The software shows the selected name details

**Refresh**

The list is updated to reflect the latest information. Usually, you don't need to use it – the list is updated automatically.

**Contacts**

The software shows the contacts for the name selected

**Homonyms**

The software presents a form showing the homonyms (clients with the same name and first name)

**Add**

To add a new name

**Action**

With this button you activate a form insuring global actions on all selected names:

- Generate a mailing list. The “Ignore” mark for the selected names has to be unchecked
- Modify at once the contact date
- Print the clients and their contacts

**List**

Print the selected clients' list

**Valid**

With this button you valid / invalid the “valid “mark for the selected names. The “valid” mark can also be changed individually, after authorizing the modifications (« Change » button). The “valid” mark is a search criterion.

Case Valid

If you check this case, NINO displays only the validated names (you valid the names by allowing modification and checking the "Valid" case for names). This way you select names and launch directly a global action for the selected names only (the ACTION button).

**Message: “Please refresh the information”**

The software asks you to refresh the information (“refresh button”)

**Note**: A search using history criteria makes some commands unavailable.

Usually the names in this form are unique (with the exception of homonyms). In case of a search by taking into account the history, you may see several times the same name. It is normal; it corresponds to each contact that suits the history search criteria.

## Software presentation

You are a consultant, a free lance, a company head, a sales representative... You are working in an autonomous way. You are producing reports, letters. You receive reports, letters. You have to find your way among documents of different origins. You have to manage your contacts, your sales, your documents. **The Nino-Consultant suite is for you!** It provides you with two basic services:

- **Manage the contacts – Nino-Contacts software.**
- Manage your multimedia documents – OrMEDIA software

All this packages are developed with the most up to date tools, and make available the latest solutions to improve the comfort of use**, to care less about your computer, and to be mostly in touch with your INFORMATIONS!**

The term "client" or "name" is used to designate the person with whom we are in a (business) relation. The term « contact » is used to designate an **activity** with the client (for example, sending a letter, a meeting, a sales proposition etc.)

Nino Contacts includes also a task management feature that organizes your "to do" tasks in projects.

**Nino Contacts offers the following basic services:**

- Stores the clients coordinates and the various actions with them time, chronologically
- Associate to the client after each contact a relation STATUS (for example: Sales presentation scheduled, Waiting for decision, Call back some months later, Not interested etc). This status is associated with a WEIGHT defining its importance for you. ***The software has already some states defined for commercial relationships. You can change them.***
- Define the contact types – for example : meeting, phone contact, mailing
- Search clients according to various search criteria
- Search in the contact history
- Use the search results as a link with a word processor, to generate individual letters or mailings
- Associate keywords to each client, to narrow the focus of the search
- Search for clients according to a combination of keywords, present or absent
- Store the letter references that were sent to clients
- Indicate the representatives in charge of clients
- Use a modem for dial-up of the selected names
- Print selected clients lists
- Activate alarms
- Manage "to do" tasks.
- Associate tasks with Internet sites (hyperlinks).
- Generate an Email mailing

**Example: Questions with immediate answers in NINO-Contacts:**

- Clients to contact today, tomorrow, in one month etc., and the relation history with each one
- Clients which were sent a mailing
- Clients that were interested in the past by a proposition
- Clients without contact since x days (x months)
- Clients to contact, ordered by the importance of the last contact (the selection is ordered according to the weight of the client status).
- Activity review - clients contacted yesterday (the last week etc.)
- Send a letter to all people interested by a topic

- Send a letter to private relations
- Create a list for special events (New Year)
- Find the document that corresponds to a contact (commercial sales, technical information, answer etc.)
- Modify at once all the “to contact” dates for a client selection that was sent a mailing
- Print a report with all the contacts of the selected clients, for a selected representative
- You call a client. He tells you to call back in 60 minutes (or at a precise time). You activate an alarm in NINO
- Classify all "to do " tasks in projects, and track their fulfillment.
- Make lists of Internet sites, with your commentaries

You can set up the software parameters to correspond to your organization system (client status, contact types, keywords etc.) At use, all this information will be presented to you, for immediate selection.

**Ease of use**

NINO makes you available an intuitive, convivial interface that corresponds to the latest developments (Office97, Intellimouse ™). At the same time, this interface gives you powerful data consultation services.

**Evolution and adaptation**

The software separates data storage and processing. This insures modular evolution

## Activity review

This form presents the last contact for each client. With the « Detail » button you jump to the client's information.

## All Topics

This form shows all the topics currently defined. The commentary will be displayed when a topic is selected.

## Author's references

This software is developed with Access97 - Microsoft.

The author is Ion A. Cartiant.   The software was initially developed for in-house use, as an aid for an important project: AMARCO ® - An architecture method for information systems.

For the author, NINO Contacts provides the management of its own business and personal contacts and letters.

**AMARCO**® is an innovative method to design information systems. Targeted at defining the services (not data!), it helps answer three basic questions about any information system: which are the services it offers, what is its structure, how does it work.

The Amarco® method application is facilitated through the use of two specially developed tools:

- Amarco organizer – an information definition and organization tool
- Amarco Draw – an automatic drawing tool

Amarco ® is a registered trademark by Ion Cartiant.

*Ion CARTIANT thanks you for your interest!*

## Client presentation

This form presents all the information that is available about a name (a client). The use is obvious. Any modification can be canceled with the ESCAPE key, as long as it was not saved. Please consult the use guide for forms.

A double click in the « Name » field starts the « Actions» form. A double click in the « Company » field » starts the « Company « form.

Some details:

**Dialing / email**

To use the automatic dialing, dialer, you must have installed the Windows dialer. To use the Email generation, you must have a MAPI compatible Email client.

**Other**

This button presents a form with all the clients in the company.

**Add a name**

Add a new name. The software suggests some default titles that you can change

**Save**

You save immediately all modifications. **Note:** the software saves automatically any modification when you leave this form.

**Contacts**

The software presents all the contacts for this name.

**Topics**

The software presents all the topics concerning the pending name. You can add also other topics.

**Ref.**

These area can store supplementary information for your name (paper where you saw its name, etc.)

**Company**

You can define a new company, or see the details for the pending company of the client

**Letter**

With this button you activate the form used to generate the mailing information. There is only one selection - the current name. ***This is very practical to generate a single letter using the client's coordinates.***

**Phone mask**

With this button you disable / enable the phone mask display

Some dial-up buttons use the Windows 95 dial up possibilities for immediate dialing.

The values of the lists available (company type, relation type etc.) can be modified in the "Configuration" form.

**Note:** an area indicates the current client status. Usually this means the status of the last contact. When there are no contacts, you can directly put a desired value in this field. This status stays valid until you activate the contact chronology form. At this moment, the status of the last contact will become the current client status

Note: use of Intellimouse

This mouse brings a lot a comfort. With the wheel you explore all the selected clients

## Color management

You can control the color of sub-forms, as well as the color of some fields in forms

The color name corresponds to their default value in the software. You may modify it freely - for example, select the green color for "Color 1 (red)"

**Selection**

With this button you select the color set for sub-forms and fields:

- Nino - default values. The color control boxes are not active.
- White - all colors white. The color control boxes are not active.
- Gray - all colors white and gray. The color control boxes are not active.
- One color - you select one color for all fields. If you want to change the subform's color, you double click on its control box.
- Current - the current colors. You may change the current colors - double click on the selected color to open a color dialogue box.

After you select colors, you may launch the color update for fields and subforms. For subforms, the color change is effective when they are open again.

The selected colors are saved.

## Companies

This form presents the details of the companies currently defined. The « Company list» area selects a company.

**Commands**

**Delete**

Delete a company

**Names**

Show all the names in the current company.

**Internet sites**

Show a form with company's Internet sites, for immediate access, if you have a browser.

**Company type**

Show the form with the currently defined company types. You can change this list. For the pending company, the type has to be chosen in the currently suggested list

## Configuration

This form presents the configuration elements.

**Import data**

{button ,JI(`',`IDH_Importation')}  Import procedure

**Keywords**

You enter / modify the keywords used for data research

**Client status**

You define the different values for the client, as well as their weights.

**Responsible / User**

You define and select the users (the responsibles) for the contacts. There is no initial password  (press <Enter>).

**Type of companies**

You define the different company types

**Contact types**

You define the different contact types with the clients (sent letter, sent fax, meeting, telephone contact etc.)

**Compact**

This button starts data compacting. You have to do it immediately after software start. Otherwise a message will inform you that this action is not available. In this case, you leave the software, start it again and go right to the configuration form, to start compaction (if you still want to compact data!).

Data compacting may also be refused if you have pending alarms.

The compact action may be refused if you have a pending mailing link (a document opened and referring to Nino mailing table).

**Software registration**

NINO can be freely used for some time. After a certain period (21 days), you have to enter a validation code to continue its use. This code is available from us or from selected distributors, upon receipt of the license fee.

**Management of phone numbers**

An area shows the current display format for phone numbers. You can change it or define a new one with the "Phone" button. If the case "Prefix" is validated, you can indicate a prefix that will be sent before the phone number, when you use the automatic dialing

The button " Clean phone numbers" deletes all non-numeric characters you entered when you defined a phone number.

**Incoming calls behavior**

You select the Nino Contacts's behavior when it detects an incoming call:

- Display the warning form
- Display the name found
- Display the name and the actions with that name

**Attach**

Once registered, Nino Contacts may attach other compatible databases (format nino_data.mdb)

**Detach**

Nino Contacts cancels the currents data attachments. The data itself is not modified.

## Configuration - Keywords

This form defines your keywords, to help define and search for clients.

## Configuration – Types of companies

This form defines the companies' types.

## Configuration –Client status

This form defines the client's status, following a contact, as well as the weight for each status.

All the status values are presented ordered by their weight. To show the new order after some new status definition, you leave the form and enter it again.

## Configuration –contact types

This form defines the contact types with clients.

## Configuration –relation types

This form defines the relation types with clients.

## Configuration –client positions

This form defines positions in company for your clients.

## Configuration –responsibles

This form is used by the administrator to define the responsibles that are in charge of various clients. You can also specialize a copy to be used only by that responsible. So it will see only the names that are dedicated.

To indicate a local user, choose him on the list (click on its name), then you select it (with the "Select button"). You validate / invalidate your choice with the "Valid" case..

## Configuration – Contact icons

With this form you assign the internal defined icons to various contact types (actions).

## Configuration – Icons

This form shows the icons available.

## Contextual menu

A click on the right mouse button shows a contextual menu. The main available commands are:

- Cut
- Paste
- Copy
- Ascending tree
- Descending tree
- Filter by selection. The software presents all the records that correspond to the current selected area in the field. When no text is selected, the whole field becomes the filtering criteria. For example, this way you may find all “John” ‘s with a filter in the first name field
- Filter except selection. The software presents all the records that do not contain the pending selection
- Display all records. This command is used to cancel a precedent filter, so it shows all the records.
- **Filter for**: You indicate the characters searched for. For example, to show all the records that contain the “80” string in the "notes" area, you select this area and you indicate on the menu ***80*** (signifies: any character (s) before + 80 + any character(s) after). If you enter 80, the software will show only the records that contain exactly this text only
- Insert an object. The software shows a dialog box to enter an OLE object reference
- Insert a hypertext link. The software displays a dialog box helping select a local document or a Web reference

## Data attachment

NINO has two main components: a presentation component (this component is now executing), and a data component (Nino-Data.mdb) that stores all YOUR data. The link between these components is established automatically, at start-up time.

## Diary

This form display a diary used to select dates.

## Edit a report

Before printing, you may preview the result. The preview is closed with the close (x) button

## Forms Use

Nino fully uses the conviviality characteristics brought in by Access97 (Microsoft) database. Most of them are familiar to any Windows 95 user.

We underline some of these characteristics:

**Forms navigation with the keyboard**

You can move from one field to another with <TAB< and < Shift TAB > keys

**Data refresh**

The data in a form can be manually refreshed with <F9> key.

**Cancel the modifications – delete a new recording**

A not yet saved new recording can be canceled with the ESCAPE key.

**Delete a record**

In the most used forms you press a « Delete » button. If the form is presented as a list (configuration forms, for example), you delete a record by selecting it (click on the corresponding selector), then press the « Del » key.

**Selector use**

Some forms show a vertical bar at their left, called “Selector”. When a recording was modified, but not yet saved, the selector shows a pencil-like sign. To save the record, click on the selector.

**Context Menu**

The right mouse button activates the contextual menu. It helps copy and paste information, as well as sort records.

### Display change

You can change the size and the order of certain tabular areas:

**Resizing a column**

- Put the pointer to the right side of the column to resize.
- Press the left mouse button and move the pointer until the column has the convenient size.

**Modify the column order**

- Put the pointer on the column title
- Click to select all the column
- Move the column left or right, with the left mouse button pressed.

Attention: these modifications are saved automatically. If you don’t like the modifications, you have to modify by hand them the other way.

## Homonyms

This form presents the clients with the same name (name and first name).

Note: if the client has no first name, it is not taken into account.

## Actions graph

This form presents the actions performed with names. It contains basically the same information as the action form. The icons display the contact types. They are configurable (the Configuration form – Contact types)

With a right click you display the selected action text.

A double click on a name activates the actions form.

**Command buttons**

- **Zoom**

  This button opens/ closes all branches with actions..

- **Detail**

  This is another possibility to activate the name form

- **Status**

  You activate / deactivate the status display for each action.

Note: The graph generation may take some time, if your client selection is large. During this generation a monitor frame will be displayed, showing the current activity. If you press the « STOP » button, the generation will be aborted. The graph will display only the processed names.

## Import data

To import data, you can use

- Predefined data import specifications
- The import assistant. To use it, you need have Access97 already installed on your computer. You can import data from various sources (text files, Excell etc.). A powerful assistant guides you to select the right parameters. This assistant is activated in the Configuration form

Nino contacts works as follows:

- Copy import data in an internal table. One the copy is done, you can see the data inside Nino that is ready to be integrated in the current database
- Update the Names, Companies and Private information

Consequently, you work as follows:

- Delete the current import data
- Import
- Update

**Button Delete**

Delete import data

**Button Import with assistant**

Import data in an internal table, using the Access assistant

**Button Direct import**

Import text data. You select an import format. With the "Example" button you may see a file containing demo data as required for the selected format.

Case **Field names:** if checked, the first line contains the field's names. The first line will be ignores.

**Button Display**

Display the data in the internal import table. You may use it also to see the field's names of the internal import table.

**Button Update**

Update the internal tables

**Import procedure with Access import assistant**

You indicate the import source. You have to change the field's names to make them identical with the fields names of the internal import table - button "Advanced" of the wizard. Your source may contain fewer fields - only the fields that are present will be updated. In the wizard, you choose as import destination the internal table **AAA-Import**.

**Direct Import procedure**

You select the import format. You indicate the text file to be imported (button "Direct import"). This file must contain the data as indicated by the selected format, and in the required order (see below). Each line is a record and must be finished with CR-LF characters. A line may contain less then all fields. The fields present must be in order. You have examples (**NinoImporti.txt**) that indicate how your own import files should look like.

The imported names have their "Valid" value checked on, so you may find them easily with a research. You find also the homonyms with the "Homonyms" button in the "Search result " form.

***Our advice*: *create a query with your tables to export and arrange the fields in the order required by Nino Contacts (see below). Then you select a fields separator and export data as a text file.*** The ***import in Nino Contacts will be obvious. The temporary table in Nino Contacts displays the values ready to integrate, so you***

***can check if they are valid.***

**Phone number import**: the phone numbers are imported as in the import file (if there are spaces or any other characters, they will be preserved). You may consider cleaning the phone numbers from all non-digit characters, after import. To do that, use the « Clean » button on the « Configuration «  form.

The field's names of the internal table are:

- Name
- Firstname
- Civility
- Function
- Service
- Tel assistant
- Tel office
- Fax
- Assistant
- Email
- Origin contact
- Ref contact
- Notes
- Company
- Company2
- Address1 Company address
- Address2
- Code
- State
- City
- Country
- Notes company
- AddressP1 Private address
- AddressP2
- CodeP
- StateP
- CityP
- TelP
- FaxP
- EmailP
- NotesP
- CountryP

## Internet sites

This form presents the Internet sites for the selected company. If you click on the « Internet site » area, the current browser is activated to find the Web page.

**Note:** to modify an Interned address, you may not click directly in this area (the browser will be activated to search for the page). One issue is to use the dedicated button that positions you in the Internet area, so you can enter the new address with the keyboard. Another solution is to position in the neighboring area, and to use the TAB and SHIFT TAB keys to navigate, to reach the Internet area.

## Lists with names

With this form you can print various lists with the names in your database

When this form is called from the « Start » menu, you print all names in the database. When you call this form after a research (that is, from the « Search result" form), you print only the names found.

## Mailing generation

The selected client list may be used to generate mailings. You can ask for a special text file generation «**NinoMail.txt** » that contains mailing information (with the "Action" form). The first recording shows the available fields. The format of this text file respects the Microsoft **Mail Merge** format.

To link this data with your documents, please refer to your word processing documentation

## Other phone and Email information

In this form you can store for the pending client other phone and Email information, with descriptive text

## Private coordinates

This form helps store the client’s private coordinates.

## Reports

The selected clients can be ordered according to various criteria:

- By name
- By company
- By contact date
- By client status (starting with the most important)

## Search criteria

This form is used to search names (clients) that conform to the selected search criteria. You indicate these criteria by entering them in the appropriate fields, then you validate them (usually the validation is activated automatically when you change something in the associated field). You start the research. **Nino searches by making a general AND with all selected criteria, with one exception: the keywords, that can be used in PRESENT or ABSENT relations** (see the keyword section, please).

### Some peculiarities

#### Name area

This area indicates a part of the name to search for.  If the « start » control is checked, Nino searches all the names that start with the indicated characters. If the « start » control is not checked, the software looks for all clients that contain somewhere in their name the indicated characters.

#### Abbr. area

This area may contain an abbreviation for the company name, to be used if you specified abbreviations when defining companies

#### Client status

Your search for clients may be based on their last status, or on a previous state. Various possibilities are available:

- Search for a client with a definite state
- Search for all clients with **at least** a definite state, based on state weight. To do that, you check the control "Other contacts" and "Asc" (for ascendant).
- Search for clients with **at most** a definite state, based on state weight. To do that, you check the control "Other contacts" and uncheck "Asc" (for ascendant).

The "Last Info" button validates a search based on the pending state. The "History" button validates a search based on all clients' history.

#### Client contact

Your search for clients may be based on the last contact, or on a previous contact. The "Last Info" button validates a search based on the pending contact type. The "History" button validates a search based on all clients' contact types.

#### Keywords

- You choose a keyword from the list. To give up a selection, you press the ESCAPE key
- You can define a new keyword by entering directly its name.
- There is no order for keywords. For example, the keyword "xxx" will be searched in all the areas reserved for keywords (Keyword 1 to Keyword 4).
- Pressing the « = » button you search for names **with** the indicated keyword. Pressing on the "D" button you search for names **not** containing the selected keyword.
- With the "Set Keyword" button you assign the selected keyword to the current client selection. To erase a keyword for the current selection, you clear the keyword zone and press the "Set keyword" button.

#### Selection area

This area indicates the major choices for the selection:

- Search for all names
- Search the names without contacts
- Search the names with at least one contact
- Search the names with the "To write " mark validated. A ***double click*** on this area helps erase all "to write" marks

- Search for names depending on the additional time selection criteria in the “contact» area.

**Income area**

This area helps select clients from companies with an income between the indicated limits

**New actions**

If unchecked, your selection includes also the actions that were due in the past. If checked, your selection includes only the actions that are due precisely for these days (today, tomorrow, etc.).

## Command buttons

- **Clear**

  This button clears all areas.

- **Search**

  You start a search for clients corresponding to your search criteria

- **Clear** « **to contact** »

  You clear all the “To contact” marks for the current client selection.

- **Phone search**

  With this button you find the information related to a phone number. If "Start" is checked", Nino Contacts searches only for the phone numbers that begin with the indicated value. Nino Contacts ignores any non-digit character in your entry: "(212)" is the same as "212".

## Software evaluation and validation

The software may be freely evaluated for 21 days starting at installation time. You will be warned when the evaluation period nears its term. Later, you will need a registration information to continue. You may receive it from the software author or from selected distributors, after payment.

Please keep the registration information for your license. You will need them to activate your software after a reinstall.

Please contact:


**SYSOFT**

**116, ave. des Champs Elysées**

**75008 Paris**

**France**

**Tél.** **+33 (0) 1 47 20 65 34**

**Fax.** **+33 (0) 01 47 23 44 52**

Email: nino@ionino.com


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**Assistance**

Our Web site presents the answers to FAQ. You may also find the latest information on our Web site: http://www.ionino.com/

## Software start-up

To facilitate the product evolution, Nino is divided in two main parts:

- A data base storing all information
- A presentation component, that uses the data (presently you are using this component).

At initial start-up time, Nino establishes an automatically the link between the two parts.

With the “Configuration” form you set-up your working parameters. The proposed titles may be changed as you wish. ***You can use the Configuration / Colors form to change current default colors.***

**At the beginning**

You click on the « Add a name » button. The software displays the form where you enter the clients’ data. You select the « name » field and you enter his name. You enter the same way other clients’ data. The software enters in some fields default values that you can change.

To select a company for the client, you press on the list control for the « company » field. At the beginning, you have no choice, because there is no company already defined. So you can enter directly a new company by pressing the « company «  button.   This activates the « company » form. Here you can also define new values for « company types ».

Once you leave the company form and are back in the « name » or « client » form, you can now choose a company.

**Please do regular backup's of the nino_data.mdb file. It contains YOUR CONTACT DATA !**

## Start

{button ,JI(`',`IDH_Services')}    Software presentation

{button ,JI(`',`IDH_TxMiseEnRoute')}    Start-up

This form addresses the main functions of the software. It also shows the size of your database.

**Criteria**

Display the client search criteria

**To contact today**

Displays immediately the clients to be contacted no later than today.

**Add a name**

Displays the form to enter a new name (client)

**Activity**

The software present a review of the last contacts

**Lists**

You can print various lists with selected clients.

**Companies**

Displays the company form

**Tasks**

Displays the project and tasks management form

**Alarms**

Displays the alarm management form

**Configuration**

Displays a form with configuration and registration parameters

**In Calls**

You can activate a form that displays the recorded calls (if you use specialized software that detects the "calling id" of your phone calls).    This button is not activated if there no recorded call.

**Contact schedule**

You activate a forms that displays the contact scheduled for the next 14 days

**Alarm schedule**

You activate a forms that displays the alarms scheduled for the next 14 days

## Incoming calls

Nino Contacts can use the "calling Id" indication to find the associated information of that phone call.   In the "Configuration" form you can select the behavior of Nino when it identifies an incoming call.

Nino Contacts uses the "calling id" information as it is transmitted to it by specialized packages. The link that establishes between Nino Contacts and the other packages is based on DDE. You have to do no particular configuration of Nino to activate the DDE link. To use the DDE link, any specialized package may use the DDE commands that are presented in the ninoct-dde.txt file. Nino Contacts ignores any non-digit information received. The additional text file nino-dde.txt that indicates how the DDE link is set up from the calling package.

## Recorded calls

This form displays the recorded incoming calls. With a double click you can display the related the name or company information.

To delete a recorded call, you can use the "Delete record" button, or select them (clock on their "selector" and then press "the <DEL> key.

## Incoming call

This form warns you about a pending incoming call. It gives you the possibility to access immediately all information stored in Nino Contacts related to this phone call. The "Configuration form allows you to select the action performed by Nino when it acknowledges an incoming call.

## Topics for the client

This forms presents all the topics concerning the pending client. The “+ Topic” button displays all the topics, to select and add one for the pending client.

To clear a topic, you select it (click on the selector area) and press the DEL key.

## Password

Your application is protected with a password.

## Password change

You can protect your software with a password. To change it, you indicate the new password, and you confirm it.

## Software registration

With this form you enter the registration information. The « Change » case helps change a current registration information.

Attention please, after three errors the current session is finished.

The button “Update” is enabled only if the old version is present in the working directory. Please see the attached text file for update information.

The commercial version may display a “To Confirm” message. It is necessary to confirm your serial number to Sysoft for further upgrades.

### Multiple databases

You may use multiple databases that you can specialize for various tasks: mailings, commercial contacts, personal contacts etc.

In the « Configuration » form two buttons provide database change: **Attach** and **Detach**.

**Please contact us for more information.**

### Alarms' list

This form presents all pending alarms. You can add a new one, or see the details of a pending alarm.

## Alarm

This form displays the details of an alarm, so you can modify its parameters.

**Cancel and see the name**

With this button you cancel the pending alarm and you activate the form with the name.

## Email mailing

You arrive to this form from the "Actions" form.

With this form you send the same message to various Email destinations (you must have an MAPI compatible messaging software already installed on your system).

A message may contain the following information:

- Subject - This the text that is indicated on the "subject" line in your messaging system
- Message - The message text
- Signature -

Once you select a signature, you can freely modify this field. To define and modify reference signatures, please use the signature form - it presents all currently defined signatures.

**The Email address is the client's mail Email address (on the Names" form).**

If the case "Message open" is checked, the messages generated stay open in the messaging software (you have to close them one by one).

The generated message is stored in the database as a message type. You can reuse it later. To ease the message selection, you may associate an abbreviation to a message type.

To save a message as a message type, press the selector (the left vertical button).

You can generate two personalized text lines: one at the start, before the text, and one after the text, before the signature. You enter the start and the end text (invariable) of each line and you check the selected cases that correspond to respective fields in your database. The generation order is as follows:

**Start Civility FirstName Name End**

Example for a variable first line:

- A great news, Dear Mister John Smith!
- A great news, Dear Mrs. Sandra Smith!

The start text is "A great news,". The end text is "!" (exclamation)

**Note: if you want to generate for each name the Action that indicate message sending and store them in the database, please use the previous form ("Actions"). You select all required parameters for the actions (client status, time to recall, etc.)**

The generated messages are not really sent. They are put in the send box of your messaging system. So you can verify the generated Email.

## Projects and tasks

With this form you manage projects and associated tasks. It shows the pending tasks for the selected project.

To select a project or a task, you click on its name. To delete an element, you select it by clicking on its selector and you press the <DEL> key.

To add an element, you click on the empty area (it has a star * on its selector) and you enter your text. You can change the default values entered by the software. To add a task, you click on the "Name" field of the task. The software adds the project name.

You can associate to projects and task names from your existent database. To do that, click on the "Name" field, to get a list with all names.

A double-click on the name activates the form with the name's details. A double-click on the Start field activates the diary.

A task may contain an **"hypertext"** link, that is, a lick to an Internet site, or a local document. To insert a hypertext link, you use the contextual menu (mouse - right-click).

The projects and the task contain an "reference " field. It may be used to indicate similar items. For example, you may define various personal administration projects, each with an ADM prefix (for example - "ADM-Letters"). With the contextual menu you may do ordering and selections on the displayed items. For example, an "ADM" filter applied on the reference field will display only the projects or task provided with the ADM prefix.

**Buttons**

**Project's details, task's details**

You change the display for the selected element.

**Projects**

With this button you display all the tasks for all projects, or only the tasks for the selected project.

**Tasks**

You select the tasks to display:

All: all the tasks

Today: tasks for today

Tomorrow: tasks for tomorrow

7 days: tasks for the next seven days

Done: tasks done

**New**

This case controls the display for the "Today, tomorrow" and "7 days" selections. If unchecked, NINO displays also the tasks not finished, pending from the previous days.

**Order.**

You select the display order for tasks

**Alarm.**

You may set up an alarm for the currently selected task. The alarm time suggested is the task's starting date, if valid.

Attention please: with the contextual menu "Insert a hyperlink" **do not use** the option 'Link inside the application (optional**)"** - it points inside NINO application.

## Software reinstall

To reinstall the software, you must have a backup of Nino Contacts directory, especially **nino_data.mdb - it contains YOUR data! You must have also the validation code that was used to register the software.**

Reinstallation procedure:

1° Reinstall the software. Another data file **nino_data.mdb** will be installed in the directory (this file is empty now)

2° Copy the backup **nino_data.mdb** in the Nino Contacts directory

3°. Start the software. It will show a blocked status. You enter the registration information, it becomes fully operational.

## Contact schedule

This form displays the names to contact on the next 14 days. You can change the starting date. To see the details of a name, double-click on it.

### New

If checked, the form presents only the new names to contact, for each day. This is the default value when the form is opened.

### Auto

The update of the information in the form may take some time on slower computers. For example, when you double click on a name, change the contact date, and come back, the modifications are not displayed if this case is off. The form is automatically updated if this check is on. If the check is OFF, you update the information displayed with the "Refresh" button. When you leave the form, the status of this check box is saved.

When you change the starting date you update refresh the display with the "Refresh" button.

## Alarms schedule

This form displays the alarms for the next 14 days. You can change the starting date. To see the details of an alarm, double-click on it.

### Auto

The update of the information in the form may take some time on slower computers. For example, when you double click on an alarm, change the alarm date,   and come back, the modifications are not displayed if this case is off. The form is automatically updated if this check is on. If the check is OFF, you update the information displayed with the "Refresh" button. When you leave the form, the status of this check box is saved.

When you change the starting date you update refresh the display with the "Refresh" button.

## Phones found list

This form presents the phones found according tpo the search criteria.

## Phone input and display format - definition

This forms helps change / define new formats for phone numbers display.

- The letter "X" indicates a digit
- The selection *None* indicates "No formatting"

Any other character will be displayed as part of the format definition, but NOT stored in the database.

Exemples :

| | | |
|---|---|---|
| X(XXX) XXX-XXXX | 1(800) 123-4567 | (Canada, USA) |
| XX XX XX XX | 01 23 45 67 89 | (In France) |
| (XXX)-XXX-XXXX | (212)-123-4567 | |
| (X)XX-XXXXXX | (1)56-123456 | |

## Network use

Various users may share simultaneously the data.   To do that:

1. You make a copy of the original data base **nino_data.mdb**. It will become the common database. ***The database must be empty when you do the copy.***
1. You put it on the server (NT, Windows)
1. You attach it (with the "Configuration" form.

The simultaneous data access is managed through Access standard services.

To define users you use the "Responsible" form. The initial password is empty (press "Enter").

The shared data are the names and the actions with the names. The tasks and the alarms are local.