CORRECTIONS TO THE OWNER'S MANUAL

The Owner's Manual is for version 2.0. It does not cover version 2.04. However, 2.04 does not alter any of the basic operations. When you have learned those operations using this manual, then turn to the 2.04 addendum that came with the manual.

Page 1-3, last paragraph. No Quick Start Guide is included.

Page 3-29, second paragraph, last line. It should read: "following the ▸, and click Enter:" The caret in the manual should point the opposite direction. The illustration at the right of page 3-29 shows where your preset text should be entered.

Page 5-49, the chart showing the logic operators that may be used as search criteria. The second listing—

= =ABC Exactly to 'ABC', note spaces

should read

= =ABC Exactly equal to 'ABC' including any spaces

In other words, "=ABC" will not match "ABCD" or "AB C."

Page 2-15, instructions for starting your own C•A•T database. The "Quick Start" files referred to here are no longer included. (The "preset report formats" discussed in the final paragraph are now included in C•A•T itself.) Whether you are working from a hard disk or a 3.5" disk, follow these instructions:

1. **Click the C•A•T icon (shown at the right of page 2-15) to select it.**
2. **Pull down the File menu and select "Open."**
3. **When C•A•T presents a menu of files to load, click "Cancel."**

The final paragraph is still accurate if you begin reading at "Regard."

Page A-1 (in Appendix A), "Via Excel." Other spreadsheets, some of them considerably less expensive than Excel, can be used for these operations. A good alternative is MacCalc (from Bravo Technologies, sold by Chang Labs). The commands in the Owner's Manual are Excel commands. The manual of your spreadsheet will tell you what to use instead.

Page A-4. The error is in the list of formulas. The second formula should read:

cell C1 contains: =SEARCH(" ",A1,B1+2) **find the 2nd space following the comma**

BLANK SPACE

continued on back

Page A-5. After the first paragraph, add another paragraph that reads:

"• At the left of the leftmost cell of your first row, insert a command telling C•A•T which window to open. If the row contains account data, the command is {1}. If the row contains contact data, the command is {3}. If you have several rows of account-window data, put the {1} only in the first row. Same with contact data—if you have several rows of it, put the {3} only in the first row."

Appendix A: Import/Export (in general). If you need more instruction for this operation than the manual provides, we have a booklet called "Importing Data to C•A•T." It illustrates each step and discusses the Excel commands used to reorganized data before import.

Page D-1 (in Appendix D). The command "Run Micro" should read "Run Macro."

Please note our new address and phone number below. The numbers listed at the front of the manual are no longer in service. We no longer have any toll-free numbers for technical support. (The registration card in your manual has our old address, but you do not need to correct it—the card will be forwarded.)

Chang Labs
3350 Scott Blvd., Bldg. 25
Santa Clara, California 95054
(408) 727-8096

C·A·T™

VERSION 2.04

ADDENDUM
TO THE
OWNER'S
MANUAL

Chang Labs

Contents

C•A•T Version 2.04
Addendum to the Owner's Manual

Throughout this addendum, instructions are indicated by an arrow ➧.

I. Mailing Labels and Envelopes on the LaserWriter

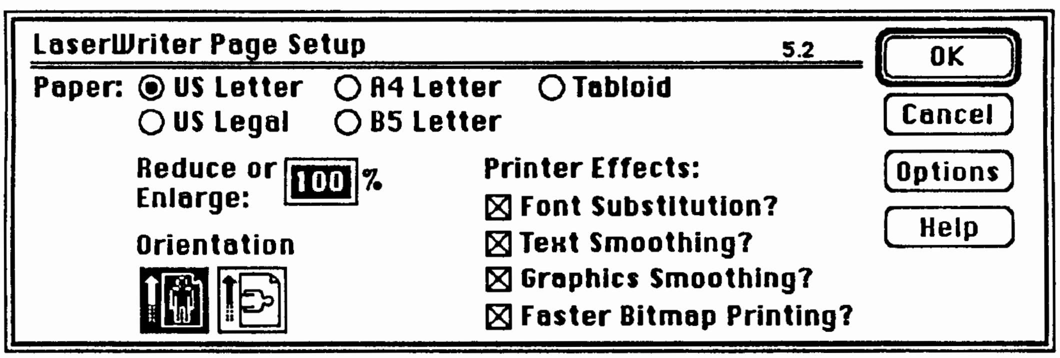
It is now possible to print mailing labels and envelopes on Apple laserwriters. It has always been possible to print labels on an ImageWriter, and the instructions for doing so (found in the Owner's Manual) are unchanged. Here are instructions for printing on laserwriters.

Printing Mailing Labels

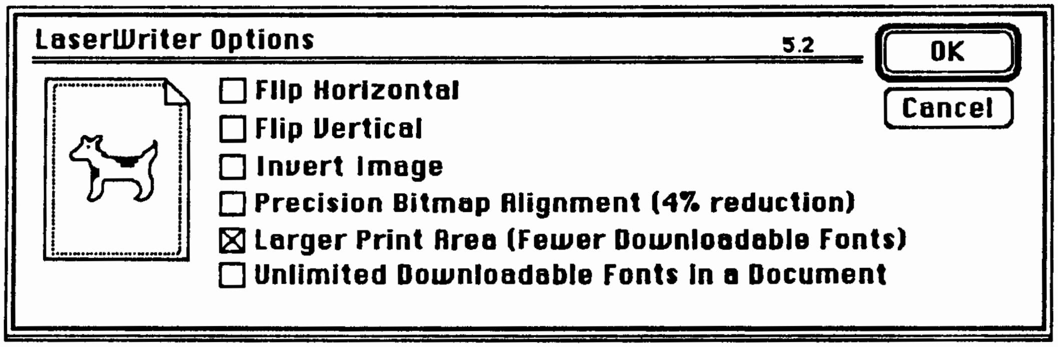
You can print on strips of labels or on 8-1/2" by 11" sheets of them—whatever will go through your laserwriter. Most stationery stores have labels designed for copiers and laser writers. An efficient method is to use 8-1/2" by 11" sheets which have 33 labels—three across and 11 high.

Printing to the Edges of the Sheet—The laserwriter normally will not print out to the edges of a sheet of paper. It leaves a margin on all sides of 3/8 inch. You can narrow this margin—to 1/8 inch at the top and bottom, and 1/4 inch at the left and right—as follows:

➧ Pull down the "File" menu and select "Page Setup." The LaserWriter Page Setup dialog box will appear:



➧ Click the Options button. The LaserWriter Options dialog box will appear (see page 2).



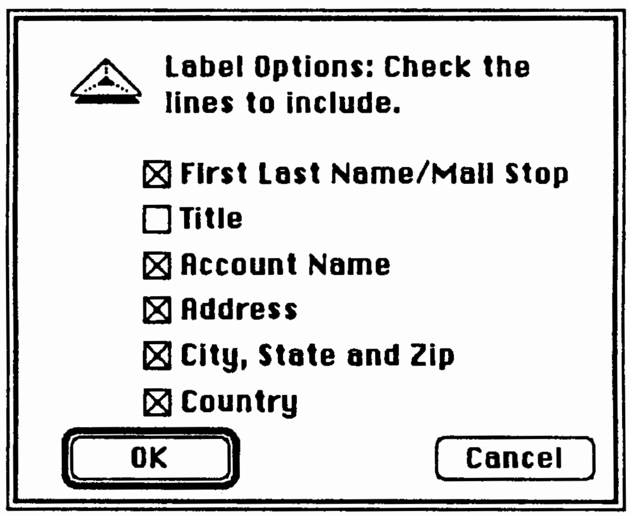
➡ Click "Larger Print Area." Then click "OK."

➡ You will be returned to the Page Setup dialog box. Click "OK."

Determining What Is Included on the Labels—Here are the steps:

➡ Pull down the "Edit" menu and select "Label Options." The Label Options dialog box will open.

➡ Click whatever information you want to include. Then click "OK."

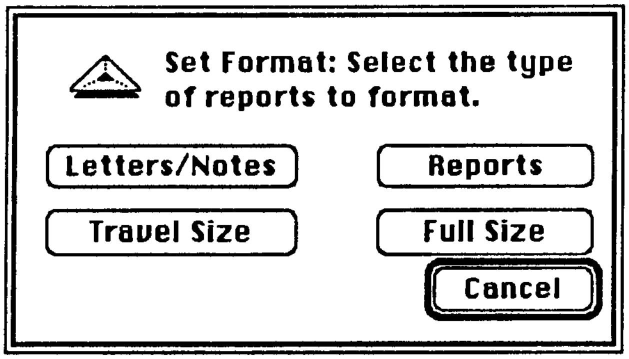


In order to include a country name on your labels, it was formerly necessary to set one of the "Preferences" (on the "Edit" menu). That is no longer necessary.

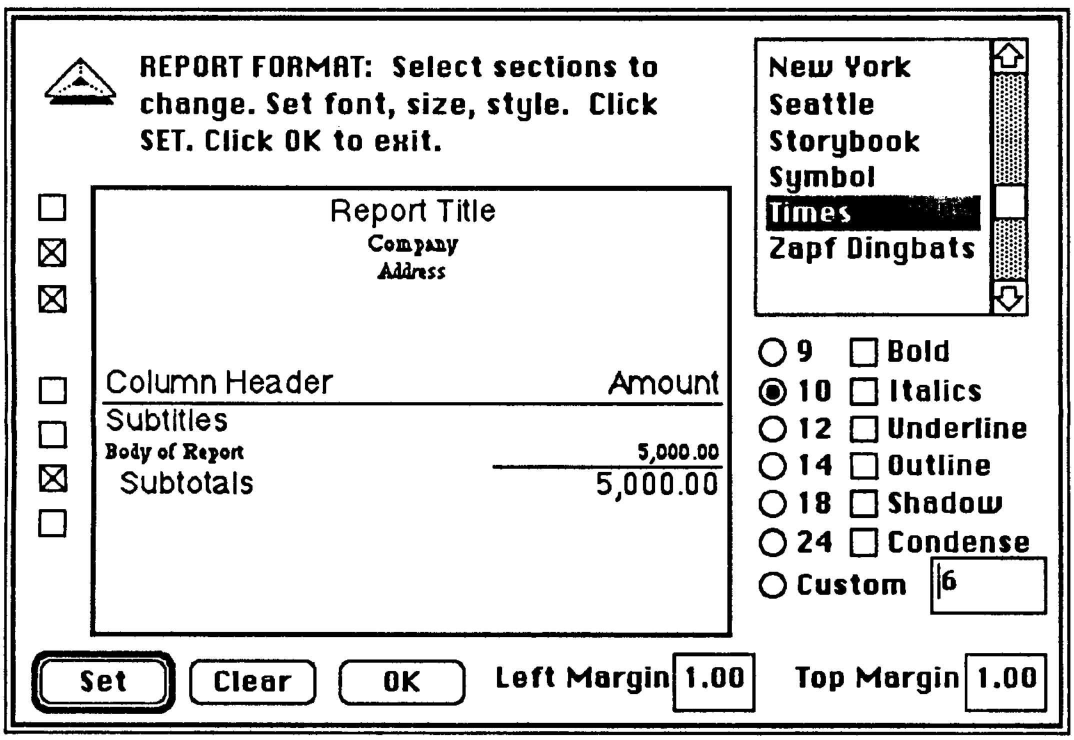
Assigning Fonts, Sizes, and Styles for Addresses

You can assign one font (in any size and style) for the name, mail stop, and title; another font for the account name; and a third font for the street address, city, state, Zip, and country.

- Pull down the "File" menu and select "Set Format." The Set Format dialog box will appear.
- Click "Travel Size." The Report Format dialog box will appear (see below).



The type for the name, title, and mail stop are controlled by the "Body of Report" setting. The account name (i.e., the company name) is controlled by the "Company" setting. The rest of the address (street, city, state, Zip code, and country) is controlled by the "Address" setting.



The illustration on page 3 shows all three of these settings being set to 10-point Times. That is a good setting to use. Times is the narrowest font in general use, and 10-point type is about as small as you'd want to go. Using this combination will squeeze five-line addresses on a one-inch-high label, and very few lines will be truncated.

➡ Click the boxes next to "Company," "Address," and "Body of Report." (Note that the boxes are not exactly opposite those words.)

➡ Click on "Times" in the list of fonts. Click the button next to "10." Then click "Set." Your screen should now look like the illustration on page 3.

Do not use the margin settings at the bottom of the window. The margins for labels and envelopes are set in the Print Mailing Labels dialog box, discussed below.

➡ Click "OK."

Determining Which Addresses Are Printed—This is unchanged. You may print labels for a members of a "view" or labels for listings in the Events Snapshot window.

Labels for a View:

➡ Display a view in the Account List window.

➡ If you want a person's name on each label, look at the contact list for each account. At least one contact at each account should be checked.

Note—Formerly it was *necessary* to link one contact to each account. Otherwise no label would be printed. (This is still true with regard to other operations, such as using the "Mail Merge" or "Clone Events" commands.) Now it is optional with regard to labels. Even if no contact is checkmarked, a label for each account will be printed.

➡ When you use the "Print" command on the "File" menu (see page 5), click the option "Labels for View."

Labels for the Listings in an Events Snapshot:

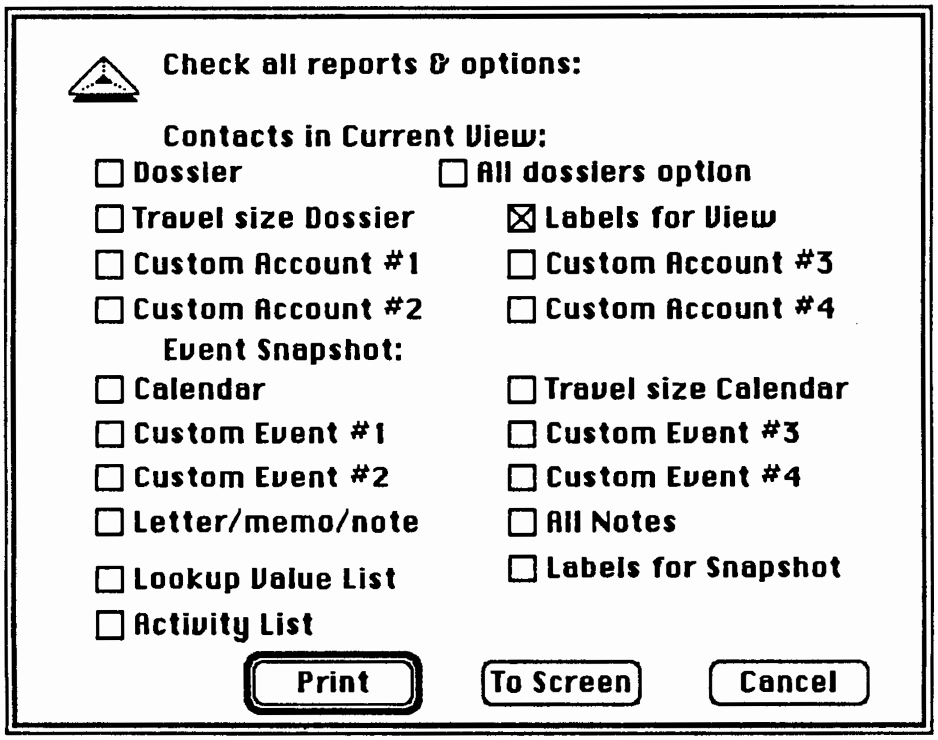
➡ Use the button settings to display a list of events. A label will be printed for the contact involved in each event.

➡ When you use the "Print" command on the "File" menu (see below), click the option "Labels for Snapshot."

Printing Out the Labels—The Print Dialog Boxes

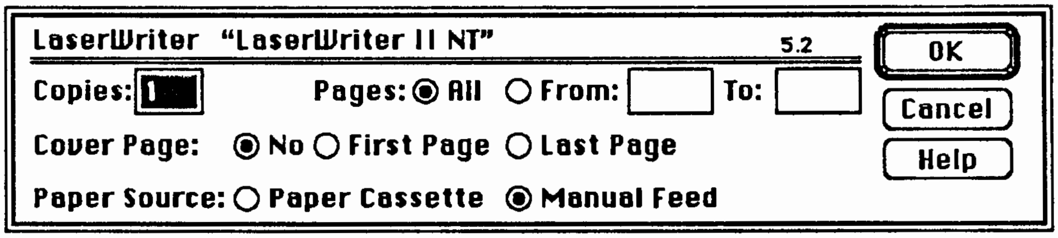
When you have completed the setup steps discussed above—

➡ Choose "Print" on the "File" menu. This dialog box will appear:



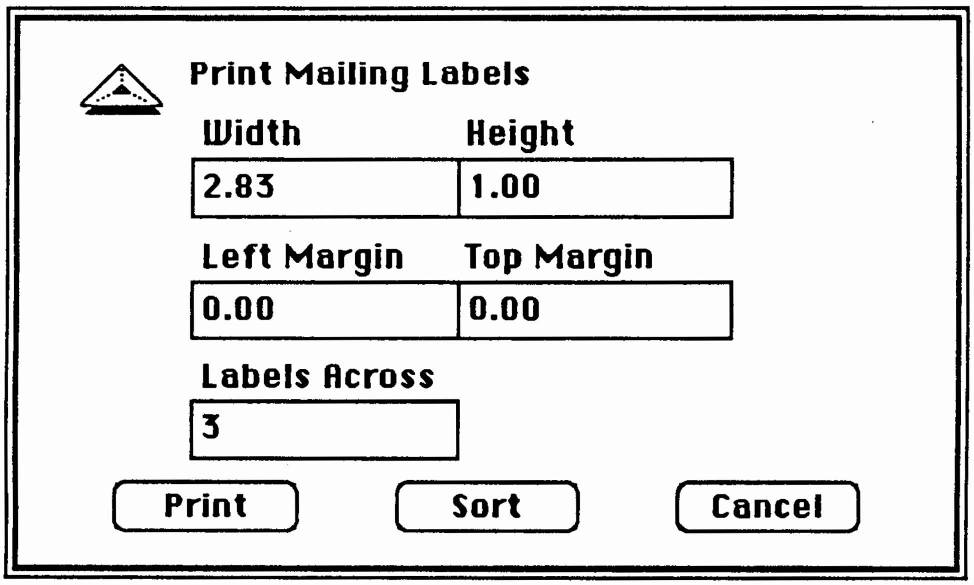
➡ If you are printing from the Account List window, click "Labels for View" (as shown above). If you are printing from the Events Snapshot, click "Labels for Snapshot."

➡ Click "Print." The laserwriter setup dialog box will appear (see page 6).



You may want to select "Manual Feed." If your labels are not on 8-1/2" by 11" sheets, you should select it.

➡ Click the button labeled "Manual Feed." Then click "OK." The Print Mailing Labels dialog box will appear.



This is where the margins are set. The settings above are correct for a sheet of labels 8-1/2" by 11" with 33 labels, three across and 11 high.

Width is measured from the left edge of one label to the left edge of the next label—i.e., the width of a single label plus any space between labels. If you use strips of labels with only one label across, this measurement is irrelevant.

Height is measured from the top edge of a label to the top edge of the label below—i.e., the height of a single label plus any space between labels.

Left Margin is measured from the left of the usable print area, not the left edge of the sheet. If you selected a larger print area (see "Printing to the Edges of the Sheet" on page 1), and you now enter a left margin of 0.00", printing will begin 1/4" from the left edge of the sheet.

If you are using strips (rather than sheets) of labels, setting the left margin takes a little thought. Determine whether your laserwriter has plastic guides for narrow paper or envelopes. If not, then set the left margin as indicated above. Then, when you insert strips of labels, insert them at the left side of the paper-feed slot.

If your laserwriter has plastic guides (so that narrow strips are inserted in the middle of the paper-feed slot), calculate the left margin using this formula:

$$\text{Left margin} = \frac{8.5 - \text{Label width}}{2}$$

The label width should be the exact width of the label, not including any margin between the edge of the label and the edge of the strip. If your labels are 3.5" wide (a standard width for pin-feed strips), then the left margin setting should be 2.5" (8.5 – 3.5 = 5.0 / 2 = 2.5).

Top Margin is measured from the top of the usable print area, not the top edge of the sheet. If you selected a larger print area (see "Printing to the Edges of the Sheet" on page 1), and you now enter a top margin of 0.00", printing will begin 1/8" from the top edge of the sheet.

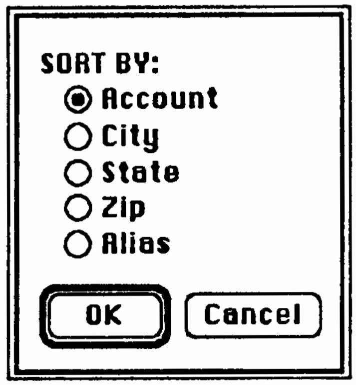
Labels Across is the number across the sheet. The maximum is 99.

➡ Enter the dimensions of your sheet (or strip) of labels. If you are just experimenting, enter the dimensions in the illustration on page 6.

Sorting Labels Alphabetically, by Zip, Etc.—This is a new feature. It is available only if you are printing from the Account List window. If you print from the Events Snapshot, the Sort button will not be available. Your labels will print out in the chronological order of the events.

➡ Click the "Sort" button. The Sort dialog box will open (see page 8).

To sort by account is to arrange the labels in alphabetical order according to account name. To sort by city, state, or alias is also to arrange the labels alphabetically according to those items. To sort by Zip Code is to arrange the labels numerically, in Zip Code order.



➡ Click one of the sorting buttons. Then click "OK."

➡ You will be returned to the Print Mailing Labels dialog box. Click "Print."

➡ If you clicked "Manual Feed" above (page 6), go to the laserwriter and insert a sheet or strip of labels. Use the plastic feeding guides, if present. Otherwise, insert the labels at the left side of the feed slot.

Hints on Saving Labels—(1) Until you become familiar with these steps, print out the first page of addresses on paper. Then hold that paper up to a sheet of labels and observe whether the two match. This method saves a lot of labels.

(2) After a while, you'll find that you have partial sheets of labels left over. Using the margin settings (page 6), you can use these partial sheets. For example, say that you have labels 1" high, and you've used the top four rows. Enter a top margin of 4.00". Printing will begin down 4-1/8" (4.00" plus the 1/8" unusable margin), or with the fifth row of labels.

If Your Addresses Don't Fit on Your Labels—If the lines of your addresses are too long, enter a smaller type size or different font (see pages 2-4). If your addresses have too many lines, you can try to remedy this with a smaller font or size. But you may have to include fewer options (see page 2)—e.g., omit the title, or even the account name.

Printing Addresses on Envelopes

The procedures just discussed apply to envelopes as well. This section will briefly restate those procedures, focusing on the differences from the label procedures.

Page Setup—When we printed mailing labels, we used the Page Setup command to enlarge the print area. That is not necessary with envelopes. However, we still want to use that command:

➡ Pull down the "File" menu and select "Page Setup." The LaserWriter Page Setup dialog box will appear.

The dialog box is illustrated on page 1. Note, in the lower left corner, the word "Orientation" above two icons.

Orientation

➡ Click the icon on the right. The lines of printing will now be parallel to the direction of the paper as it passes through the laserwriter.

➡ Click "OK."

➡ Pull down the "Edit" menu and select "Label Options." When a dialog box appears, click next to the information you want to include. Then click "OK."

➡ If you want to change the type font or size, pull down the "File" menu and select "Set Format." When a dialog box appears, click "Travel Size." When the Report Format dialog box appears, make any changes you wish; then click "Set"; then click "OK."

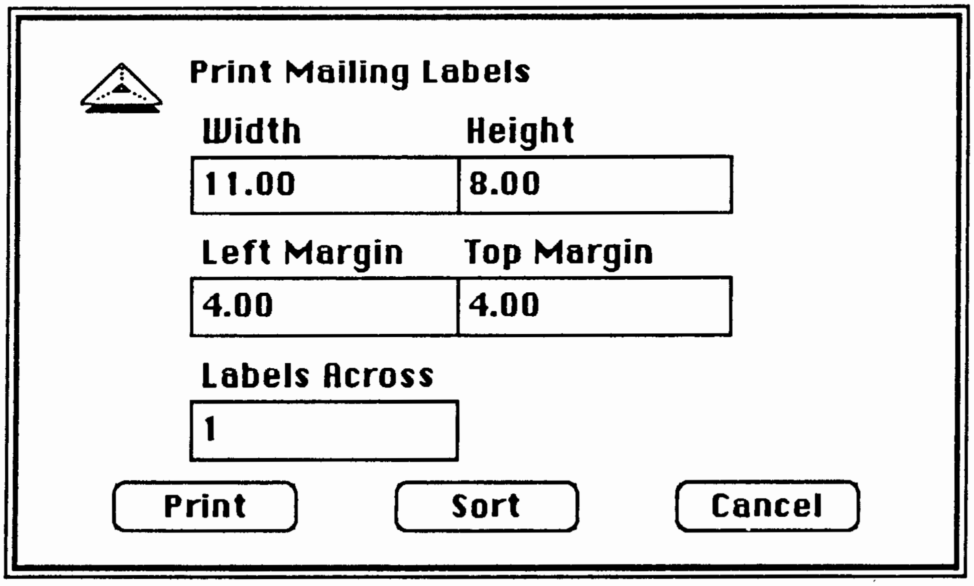
➡ Display a view in the Account List window (or a list of events in the Events Snapshot window).

➡ Pull down the "File" menu and select "Print." When a dialog box appears, click to select "Labels for View" (or "Labels for Snapshot"). Click "Print."

➡ When the laserwriter setup dialog box appears, click the button for "Manual Feed." Then click "OK." The Print Mailing Labels dialog box will open (see page 10).

The Width setting is not important for envelopes. It could be 0.00" or 21.00".

The Height setting is slightly more important. The exact value doesn't matter so long as it is over 3.3". (With values under 3.3" you may get a second address printed at the bottom of your envelope.)



The Left Margin setting should probably be 4.00". This is the distance between the left edge of the envelope and the left edge of the address. In a way, this is the envelope's "left margin." The margin will actually be slightly larger—either by 1/4" or 1/8" (as discussed on page 1).

Here's how to calculate the Top Margin setting. The manual paper feed slot on laserwriters is 8-1/2" wide. You will insert envelopes left edge first into this slot—therefore, the top of the envelope will be toward the right of the feed slot. The Top Margin setting will determine the distance between the right hand side of that slot and the top of the address.

Many laserwriters, particularly older models, have no plastic guides for envelopes (or other narrow paper). In this case, envelopes should be inserted at the right side of the feed slot. The Top Margin setting will simply be the distance between the top edge of the envelope and the top of the address—probably 2.00".

If, however, your laserwriter has sliding plastic guides, the setting should be about 4.00", as shown above. Here's why: When the guides are adjusted for envelopes, they are close to the center of the feed slot. When you feed an envelope into the laserwriter, the top edge of the envelope is about two inches from the right edge of the feed slot. The setting of four inches consists of those two inches (to reach the edge of the envelope) plus two more inches (to place the address in the center of the envelope).

It is less expensive to experiment with plain paper.

➡ If your laserwriter has plastic manual-feed guides, enter the settings shown on page 9. If your laserwriter has no such guides, still enter the settings on page 9, except enter a Top Margin setting of 2.00".

Just as with mailing labels, you can sort the order in which addresses print out—but only if you are printing from the Account List window. (See page 7, "Sorting Labels . . . .")

➡ Click "OK."

➡ Go to the laserwriter and begin inserting envelopes using the manual feed slot. Allow two or three seconds between envelopes.

General Computer's Personal Printer

This printer is now supported by C•A•T.

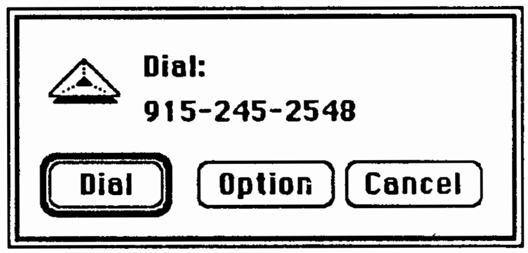
II. Expanded Autodial Compatibility

Setting Up for Autodial

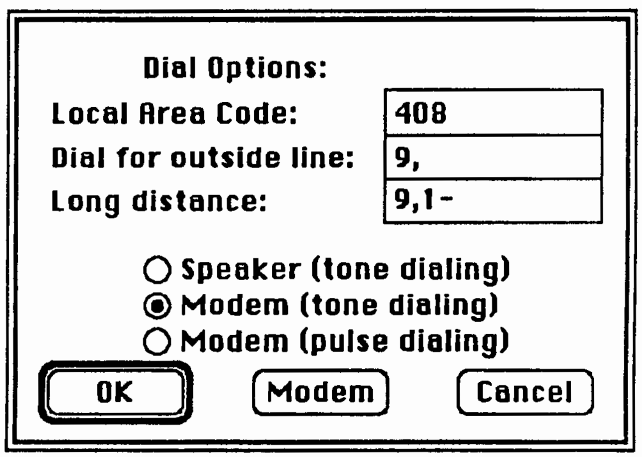
C•A•T is now compatible with many more modems and with the AT&T 7403-D, 7405-D, 7406-D, 7407-D voice terminals. A new dialog box has been added for modem settings.

➡ Display any account in the Account window (or any contact in the Contact window, or any event in the Event window).

➡ Pull down the "Action" menu and select "Dial." The first Dial dialog box will appear:



➡ Click "Option." Another dialog box will appear (see below).



As before, you enter your own local area code in the top box. Later, when you dial a number, C•A•T notes whether the number begins with the local area code. If so, C•A•T will omit it.

The next box is for any preamble required to get an outside line. The comma represents a 2-second pause. The bottom box is for any preamble required to place a long-distance call. It should begin with the preamble to get an outside line.

Below the preamble entry boxes is a column of buttons. These are the three dialing options. The "Speaker (tone dialing)" option uses the Macintosh to generate audible tones recognized by some telephones. The

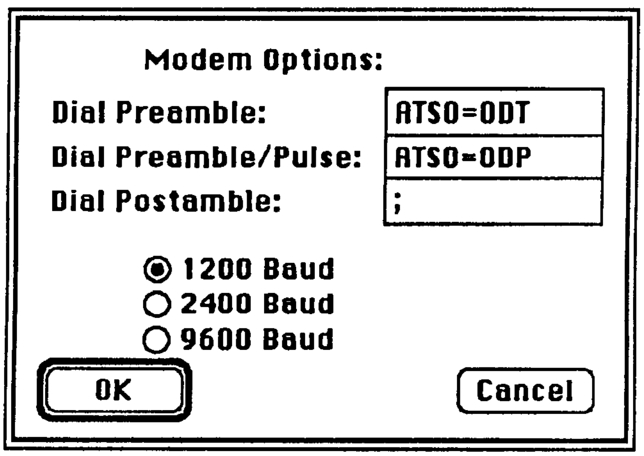
"Modem (tone dialing)" and "Modem (pulse dialing)" are for use with modems.

Determining Whether You Can Use Speaker Autodial—The audible tones generated by speaker autodial are recognized by analog telephones. Typically these phones are used in small businesses or homes. They are not used in larger companies that have digital PBX systems.

You can test compatibility of your phone with speaker autodial by holding the mouthpiece of the phone next to the Macintosh speaker. Then display a phone number, as detailed above; select "Dial" from the "Action" menu; and click "Dial." If the phone responds (i.e., if the dial tone stops), then you can buy an inexpensive product, such as Hyper Dialer, which connects the speaker jack on the back of your Macintosh to your phone. (In effect, the Hyper Dialer is a remote speaker that moves the audible signals closer to the mouthpiece of your phone.)

Modem Settings—Check your *phone* system (not your modem) to find out which setting is appropriate, pulse or tone.

➡ Click either the "Modem (tone dialing)" or "Modem (pulse dialing). Then click the button labeled "Modem." The Modem Options dialog box will appear:



Formerly the preamble was preset to work with Hayes (or Hayes-compatible) modems. Now you can set the preamble to work with other modems or phone systems that support digital terminal equipment (DTE). Check the owner's manual for your modem and/or phone system to learn the protocols necessary for autodialing.

Preamble—This instructs the modem or phone system to prepare for dialing. Once the preamble is complete, C•A•T will use the dialing sequences entered earlier (see the Dial Options dialog box on page 12) to find an outside line and dial the number. Then comes the—

Postamble—This is the sequence needed to relinquish control of the phone system. (Additional information on pre- and postambles is found below.)

➡ If you have a tone phone system, use the box labeled "Preamble." If you have a pulse phone system, use the box labeled "Preamble/Pulse." Enter the correct preamble for your modem/phone system.

➡ Use the box labeled "Postamble" to enter the correct postamble for your modem/phone system.

➡ Set the appropriate baud rate for your modem—1200, 2400, or 9600.

➡ Click "OK."

Miscellaneous Modem Notes

- C•A•T is preset for no parity.
- C•A•T will work without change with Hayes (and Hayes-compatible) modems. It may be necessary to preset certain modem switches so that dialing works properly.
- Hayes modems accept the , (comma) character, which sends a two-second delay during dialing. They also accept the *P* and *T* characters for mixed mode dialing. These characters may be inserted in the prefix for accessing outside and long-distance lines.
- Hyphens, parentheses, and spaces may be used within numbers. They are ignored when dialing.
- For most AT&T phone systems, replace both the preamble and the postamble with the BREAK character (entered by typing Control L).

III. Other Enhancements

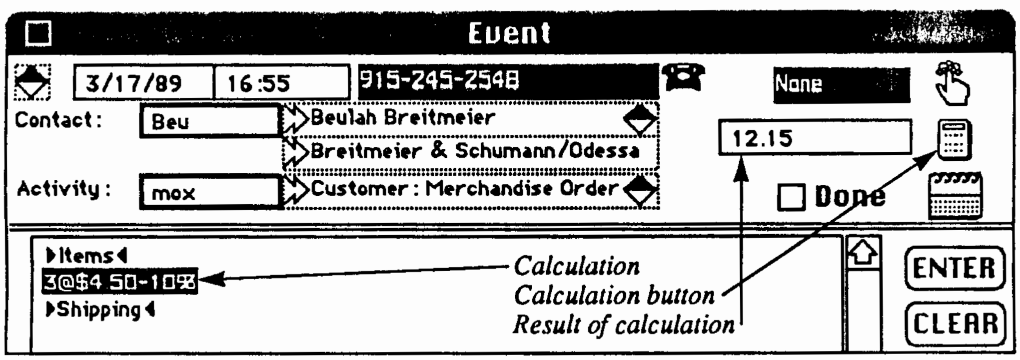
International Features

Several non-English language versions of C•A•T have been created. They allow a variety of formats for addresses, monetary amounts, dates, and time. Most of these features, however, depend on using the Apple system files specific to particular countries. If you do business extensively with France, Italy, or the United Kingdom, call Chang Labs and ask for details about these special versions of C•A•T.

Two international features are available to users of the standard English-language C•A•T—calculating without a dollar sign, and including European characters in account or contact names.

Calculating Not in Dollars

As it always has, C•A•T performs calculations entered in the Event window. For example, if you type "3@$4.50-10%" in the notes area of an Event window, C•A•T will understand that you mean "3 items at $4.50 minus 10%." If you then click the Calculation button, the result ($12.15) will be displayed:



Formerly this function worked only if the calculation included a dollar sign ($), as shown above. Now the function will operate if—

- the calculation includes a dollar sign ($); or
- the calculation includes a pound sign (£), entered by holding

down the Option key and then typing "3"; or

- the calculation is preceeded by an equal sign (=).

Sorting Names With International Characters

You may include international characters in contact or account names, for instance: "Müller A.G." or "Comédie-Française." C•A•T ignores all inflection marks when alphabetizing. For example, *e*, *é*, and *è* are treated as if they were the same.

Using an Alias to Search for a Contact Name

Let's assume you have a contact named Joseph Argyle, and his alias is "Whizzer." Formerly, when using the heavily outlined search boxes (at the top of the Contact window or the top of the Event window), you could search for a contact name using the first or last name.

In other words, to search for Mr. Argyle, you had to type either "Argyle, Joseph" or "Joseph Argyle." Now C•A•T lets you also use the alias in place of the first name. You can search for Mr. Argyle by typing any of the following:

- Argyle, Joseph
- Joseph Argyle
- Argyle, Whizzer
- Whizzer Argyle

Event Lists Now Include Preset Text

Now, when you print event lists, each event will include both the preset text and the text unique to that event. Form letters will print out in their entirety, and questionnaires will include the questions (preset text) as well as the answers (unique to each event).

Automatic Backup (Partial)

C•A•T can be used with multifinder. However, experience has shown that occasionally multifinder will give you an "UNEXPECTED QUIT" message. When this occurs, it not only loses what you're working on, it also kills one of the two disk files containing your database. The one it destroys is the one without the -NOTES suffix. Therefore, every time you save your database, C•A•T now automatically creates a backup only of the file in jeopardy. If such a crash occurs, you will lose any work done since the last save; but you will not lose your most of your database.

This is not the same as backing up your entire database. To back up the entire database, you should also create a backup of the -NOTES file as well.

❖ ❖ ❖

Why you should send in your registration card today

1st

CHANG LABS PRODUCT SUPPORT PROGRAM

At Chang Labs, support is as important to us as a great product, and we're committed to providing a high level of customer service and technical support for our registered users. We want you to get the most from C•A•T, and we would like to help you.

If you should have a technical question or a problem, we strongly suggest that you consult your manual first. Our experience has shown that it usually contains the answers to most of your questions. If you still need assistance, call our Technical Support Department from 8:00 A.M. to 5:00 P.M., Pacific Time, Monday through Friday (excepting national holidays). The telephone number is (408) 727-8096. Please remember to have your Customer I.D. number handy when you call. We will send you that number when we receive your registration card.

The first 90 days of support are free, as long as you are a registered user. To receive support after that, you can purchase our Extended Support Policy (see the back of this card).

2nd

C•A•T PRODUCT UPGRADE PROGRAM

We're always working to improve our software and to protect your software investment. The only way to be certain of learning about upgrades is to return your registration card. These notices will give the price of the update, a list of enhancements, and ordering instructions.

Only registered owners will receive technical support and

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•T Program Disk)

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Zip

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C•A•T?

Extended Support Policy

Use this card to order Extended Support. You can order now and we'll start the policy at the end of the first 90 days of free support. Or you can save this card and wait until the 90 days is over. We'll send you a notice at that time.

For the annual fee of $75, you will receive:

- Technical Assistance on all Chang Labs products, even programs you purchase after the policy is in effect.
- Telephone access to a C•A•T technical expert for one year, for answers to your questions.
- A discount on the replacement cost if your C•A•T master disk is accidentally damaged during the 12 months. You pay just a $15 handling charge.
- 50% off the cost of new versions as they are released.

Name______________________________

Company______________________________

Address______________________________

City____________________ State________ Zip________

Method of Payment: ❑ Visa ❑ Mastercard ❑ Check (payable to Chang Labs)

Card number ____________________ Expiration Date________

Name on card (if different)____________________

Authorizing signature____________________

Note: Site Licenses for C•A•T are available.

Call (408) 727-8096 for more information.

Registration Card

Please complete and return this card before using your new product. You can obtain telephone technical support only after sending in your registration card.

Serial Number
(from label of the C•A•T Program Disk)

Please print or type

Name______________________________ Title________________

Company name____

Address____

City______________________________ State________ Zip________

Telephone_________________

Date of Purchase_____/_____/_____ Purchased from__________________

City______________________________ State________ Zip________

Number of employees in your company__________

How many Macintoshes in your location?__________ in your company?__________

How many other PC's in your location?__________ in your company?__________

What general category covers your job (sales, marketing, legal, etc.)?__________

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What sort of work do you actually do?______________________________

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How did you learn about C•A•T (store, friend, review, ad, etc.)?______________

____

If you learned about C•A•T from an ad, where and when did it appear?__________

____

What feature(s) persuaded you to try C•A•T?__________________________

____

What improvement/problem do you hope to achieve/solve by using C•A•T?_______

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Chang Labs
3350 Scott Blvd., Bldg. 25
Santa Clara, CA 95054-9748

C·A·T™

OWNER'S MANUAL

Chang Labs

C•A•T™

Relational
database
for managing
CONTACTS
ACTIVITIES
TIME

Chang Labs

End User License Agreement

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MCT 0200

Contents

Chapter 3: Using C.A.T.

Chapter 4: Printing Reports

Chapter 5: Command Reference

Before You Begin

Welcome to C.A.T., the relational database for managing your Contacts, Activities, and Time.

This chapter provides:

- A checklist of system requirements.
- Instructions on how to make a working copy of C.A.T.
- Instructions on how to install C.A.T. on a hard disk.
- Instructions on how to make a backup copy of your data.
- An overview of the manual.

What You Need

C.A.T. supports the Macintosh 512E, Plus, SE, and II. The minimum system requirements for using C.A.T. are:

- Two 800K drives or a hard disk.
- Any model of the ImageWriter or LaserWriter printers; an ImageWriter is required to print mailing labels.

Working Copy

Before you begin to use C.A.T., make a working copy of the Master disk. Never work with a Master disk. If your working disk is ever damaged, you will have the Master to make another copy. Follow the instructions below for your system configuration.

800K Drives

It is recommended that you set up a working disk that contains both the program and data files.

- Initialize two blank disks and name the disk icons "C.A.T. Work" and "C.A.T. Data Backup."
- Eject the disks and label them. Write the version and serial numbers of the Master disk on your C.A.T. Work disk label.
- Write-protect and insert the Master disk in the internal drive.
- Insert the C.A.T. Work disk.
- Drag all icons from the Master disk to the C.A.T. Work disk.
- When the copy is complete, store the Master in a safe place.

Once you set up your own C.A.T. files, you can remove the tutorial's Sample files to free up space.

Hard Disk Setup

C.A.T. is not copy-protected and may be used on a hard disk without a key disk. It is recommended that you make an extra copy of the program for backup use.

- Start up your hard disk as usual. Create a folder to store your C.A.T. files.
- Initialize two blank disks and name the disk icons "C.A.T. Program" and "C.A.T. Data Backup."
- Eject the disks and label them. Write the version and serial numbers of the Master disk on the C.A.T. Program disk label.
- Write-protect and insert the Master disk in the drive.
- Drag all of the files *except* the System Folder from the Master disk to the hard disk.
- When the copy is complete, C.A.T. will be installed. Eject the Master disk and store it in a safe place.
- To make a backup copy of the program, insert the C.A.T. Program disk and drag the following files from the hard disk to the Program disk: C.A.T., Sample C.A.T., and Sample C.A.T.-NOTES.

Backing Up

The importance of backing up your data cannot be overemphasized. The larger the file, the greater the loss if anything should happen to corrupt your disk and/or data. Make a habit of backing up regularly, perhaps at the end of each day.

When you finish a C.A.T. session, save your data on disk or on your hard disk. Then exit the program and return to the Finder. Next, follow the instructions given below to back up your data.

800K Drives

- Your C.A.T. Work disk is in your internal drive.
- Insert your C.A.T. Data Backup disk in the external drive.
- Drag your C.A.T. Data and C.A.T. Data-NOTES files from the C.A.T. Work disk to the C.A.T. Data Backup disk.
- Once the copy is complete, store the C.A.T. Data Backup disk in a safe place.

Hard Disk

- Insert your C.A.T. Data Backup disk.
- Drag your C.A.T. Data and C.A.T. Data-NOTES files from the hard disk to the C.A.T. Data Backup disk.
- Once the copy is complete, store the C.A.T. Data Backup disk in a safe place.

About this Manual

In chapter 2, "Learning C.A.T.," you learn the basic C.A.T. operations. You will learn how to load C.A.T., enter data, select and link records, use C.A.T. windows, save data, and exit C.A.T.

Chapter 3, "Using C.A.T.," explains C.A.T.'s advanced operations, step-by-step, and including examples.

Chapter 4 is a reference on "Printing Reports." It includes a thorough discussion of all printing options and shows examples. Tips on printing problems are also provided.

Chapter 5 is the "Command Reference" which gives a complete description of the every command in each of the main menus.

And there are five appendices:

- Appendix A explains how to import and export data. C.A.T. supports data transfer from C.A.T. to C.A.T. and from C.A.T. to other applications such as spreadsheets and word processors.
- Appendix B lists all of the references available for preset text.
- Appendix C describes how to print your own logo on reports.
- Appendix D lists all keyboard commands (for people who prefer using the keyboard to using the mouse).
- Appendix E explains managing C.A.T. files on multiple disks.

At the end of the manual, there is a glossary of terms and a complete index to help you find the information you need quickly. The table of contents is also a good source to locate information quickly.

Where to Begin

If C.A.T. is the first database that you have encountered, start with Chapter 2 and use the rest of the manual as a reference manual.

If you are a knowledgeable database user, start with the Quick Start Guide and use this Owner's Manual as your reference.

Learning C.A.T.

This chapter has three sections:

- "The Joy of Managing" explains the relational power of C.A.T. If you are intrigued by technology and how it helps you to work faster and with less restrictions, read this section. If you just want to get started, then skip this section.
- "Quick Clicks Tutorial" is a guided tour through the basic features of C.A.T. using the Sample C.A.T. file.
- "Entering Data" shows you a step-by-step guide for entering your data into C.A.T.

The Joy of Managing

"In six months, I have collected 1,500 names, as well as 2,500 letters, contracts, agreements, and other data -- all of them in C.A.T. And I can retrieve any pertinent data in two seconds with a few clicks of the mouse. My business life has changed.

"Writing letters is a snap (or more accurately, a click).

"Managing a seminar, a committee, a fund-raiser, or an association has become a trivial pursuit.

"Projects requiring coordination among 10 or 20 people are simple. I can send data to a spreadsheet or to an associate as easily as saying 'do it.'"

C.A.T. is Relational

This is what you'll be saying sooner than you think. C.A.T. releases the power of relational databases. C.A.T. manages contacts (the thousands of people you meet in any year), activities (the hundreds of projects you do per year), and time (time for golf, that is).

Traditional databases and spreadsheets restrict the data you save -- to one sheet of paper per contact. C.A.T. uses relational technology to let you link unlimited sheets of paper to every contact. That's like having a folder with unlimited capacity for every contact. The sheets may be simple notes, appointments, or facts, or substantive items such as quotes, letters, invoices, contracts, and agreements -- virtually any data.

Because C.A.T. is relational, there is no redundancy of data. Common addresses, letters, titles, or notes are entered once and only once. For example, when you update an address, it is corrected for all items in your file. Relational databases:

- Save time on data entry,
- Give you more space for more data,
- Provide unlimited capacity for data per contact, and
- Get your work done faster.

C.A.T. Is Fast

And C.A.T. has proprietary technology to make it fast. A "triple helix" of links lets you search through even 10,000 records in a few seconds.

After 50 names, you might not notice the difference. But in business, our circle of contacts grow naturally. In time, you'll wonder how people can function without C.A.T. and a computer.

Relational Records

C.A.T. tracks four kinds of records in one database. They are the account, contact, event, and activity records.

Information is hot-linked between records. When you need the address of a contact for a letter, C.A.T. gets it, instantly. When you change the address, the address is changed on the letter and everywhere else in the database, as well.

Windows for Records

C.A.T. uses a pair of windows to manage each record type -- one window shows lists of records and the other allows entry of records of that type.

All windows can be on screen and open at the same time. Similar to the Finder, when you close a window, C.A.T. does not close down the document. A closed window simply means that you want to hide a window from the screen.

Like pieces of paper on your desk, feel free to open a window (pull out a piece of paper), close a window (put a piece of paper away) , or manage lots of open windows on screen (a pile of projects on your desktop) to suit your own preference. Experience from C.A.T. users show that people adjust to the power of working with multiple windows -- easily.

Nonsequential

And C.A.T. is nonsequential. Because a typical C.A.T. database manages multiple projects at the same time, it is difficult to show one sequence for using C.A.T. In the sections below, we help you to understand the various ways to work with C.A.T.; but your pattern of use depends on the things you need to do on a particular day.

Relational databases are far more powerful than traditional databases. C.A.T. finally makes that power accessible without programming. Read on to see how.

Quick Clicks Tutorial

In this section, we will show you how to:

- Start and exit C.A.T.;
- Work with C.A.T. windows; and
- Click your way through the "Sample C.A.T." file.

Throughout this section, you will see one or more boldfaced sentences that begin with the symbol Δ. The symbol marks an action for you to perform. Follow any numbered boldfaced steps in order.

To get C.A.T. up and running, do the following:

Δ **Start C.A.T.**

If you are starting C.A.T. from a hard disk:

Hard Disk

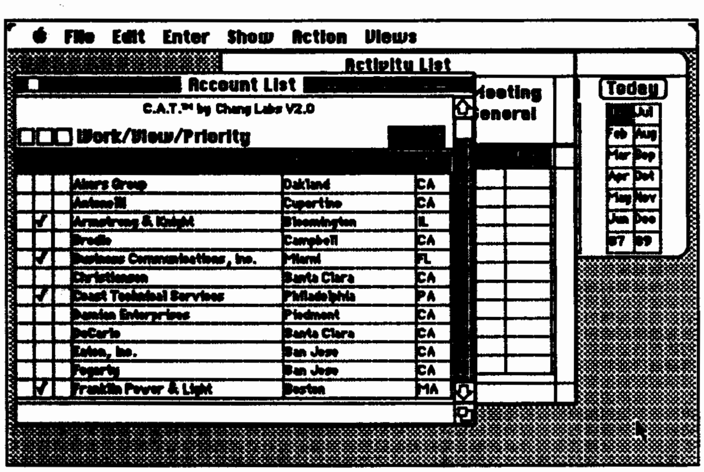
1. **Click the C.A.T. icon in the Finder to select it.**
2. **Choose Open from the File menu.**
3. **When C.A.T. presents the choice of files to load, double-click the "Sample C.A.T." filename.**

Or double-click the "Sample C.A.T." data icon to open it.

If you are using C.A.T. with one 800K disk drive.

800K Disk Disk

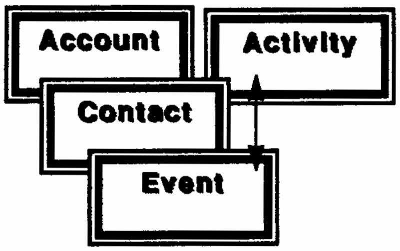
1. **Insert and open your C.A.T. Work disk.**
2. **Double-click the "Sample C.A.T." icon.**



Exit C.A.T. To exit C.A.T. at any time, choose Quit from the File menu. The Quit command will let you choose whether you wish to save any changes you have entered. You should not quit any program by simply turning off the computer.

C.A.T. Records

C.A.T. stores information in four types of records that are linked together:



- **Account** records are used to track names, addresses, and phone numbers for either companies or individuals. Accounts can be referred to by account name or by an alias that could be a number.
- **Contact** records are used to track names, titles, and other information for individuals within accounts. Contacts are linked to an account so that the address, phone, and other information do not need to be reentered. There is no limit to the number of contacts that can be linked to an account.
- **Activity** records are used to track any subject matter. For example, you could use C.A.T. to log phone calls, send letters, schedule meetings, remember birthdays, track orders, or manage projects. For each subject, you create an Activity record to track all the events associated with this activity. There is virtually no limit to the number of activities you create.

  (In technical terms, activity records are field names in traditional databases. Because C.A.T. is relational, activities have many more features than traditional fields.)
- **Event** records are used to track your specific interaction with your contacts, by activity, at a particular time. Events are linked to a contact and activity and automatically time-stamped. For example, when a customer places an order, you log the order as an event record. You link the event to the customer's name and identify the type of order as an activity. You can track unlimited orders from a customer, letters sent to that customer, or any other information associated with a contact.

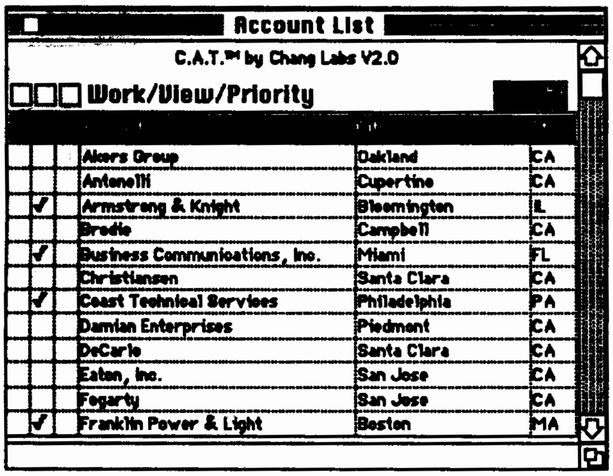
  (In technical terms, events are field values in traditional databases.)

In the tutorial below, you will click through the record types and work with the C.A.T. structure using typical data.

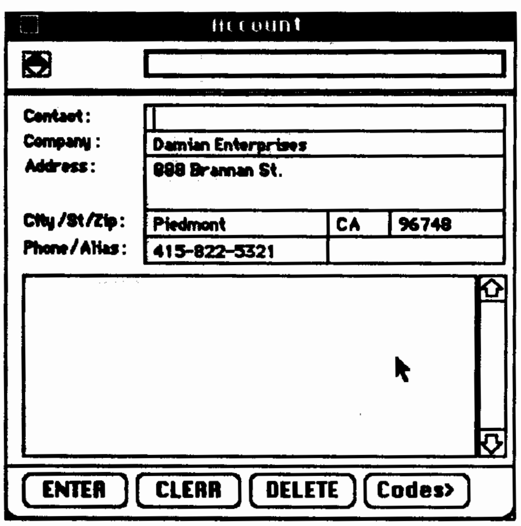
Window Types

C.A.T. uses windows to manage each type of record. C.A.T. has two kinds of windows:

- **List** windows are used to look up or view information.



- **Entry** windows are used to enter and view individual records.



The table to the right summarizes the names of the primary windows in C.A.T.

Entry Window	List Window
Account	Account List
Contact	Contact List
Event	Events Snapshot
Activity	Activity List

C.A.T. Buttons

In C.A.T. windows, you see normal Macintosh graphics such as scroll bars, close box, title bar, sizing boxes, radio buttons, check boxes, and command buttons. *If you are not familiar with any of these terms, please consult your Macintosh Owner's Manual.*

In addition, C.A.T. defines two new graphics. They are:

	**Next button**	Show the next or prior record.
	**Goto arrow**	Single-click to go to the List window. Double-click to go to the Entry window.

Clicks & Double-Clicks

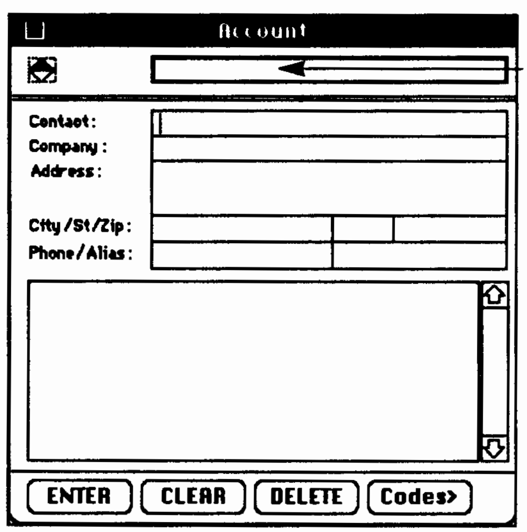
When you select a record from a list window, the first click "selects" and highlights the record. A second single click on the highlighted record causes C.A.T. to zoom to the next logical level. And a double-click on the highlighted record causes C.A.T. to open the entry window for that record. You can experiment with these conventions as you work with the tutorial.

Searching

C.A.T. provides many ways to find information. One way is to type the name or alias of an account and let C.A.T. search for it. To do this:

Δ **Choose New Account from the Enter menu.**

C.A.T. shows the Account window.



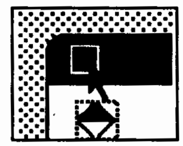
Search field: Click here and type f.

The heavily outlined box at the top is a "clairvoyant" field used to search for information by typing the names of accounts, contacts, or other data. It is clairvoyant because it gives you the name you're searching for *before* you type all of it. Clairvoyant search is active throughout C.A.T.

Δ **Click the bold outlined box at the top to activate the data cursor.**

Δ **Press any letter on the keyboard.**

As you type a letter, C.A.T. presents possible results of the search. If the record you want is not shown, continue typing its name.



Δ **Close the Account window by clicking the close box on the upper left.**

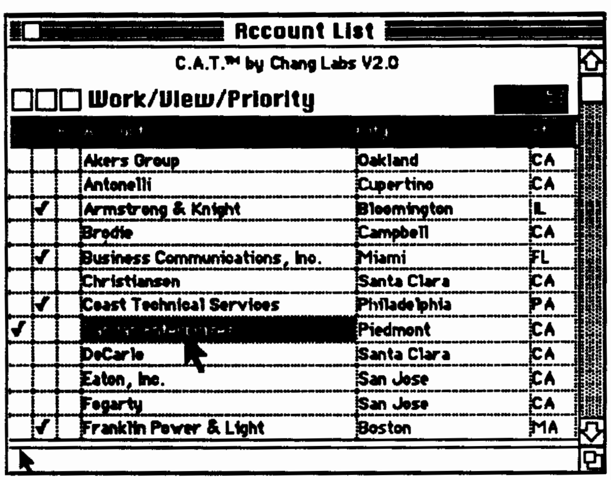
Account Lists

C.A.T. supplies many other ways to find information besides searching by typing the record name. You can work with lists and sublists by pointing and clicking with the mouse.

Highlighting Records

In the window below, C.A.T. shows an alphabetized list of 53 accounts. You can point and click on the name of the account to select an account. Each time you click, C.A.T. highlights your selection.

Δ **For example, click on "Damian Enterprises".**



Views When your list of names gets long, you can group specific accounts into views and display only the accounts in that view. For example, you might create views to show all "vendors" or for all "press" contacts.

One way to create views is to click to checkmark an account. In the Account List window, there are three columns on the left.

W **Work view** This view shows all changes made to your database since you last saved to disk.

V **View** (i.e. the <u>current</u> view.) There are 13 saved views -- each with a different name.

P **Priority view** This view is used to note accounts that may be more important than others in the current view.

Note that some of the accounts are already checked (√).

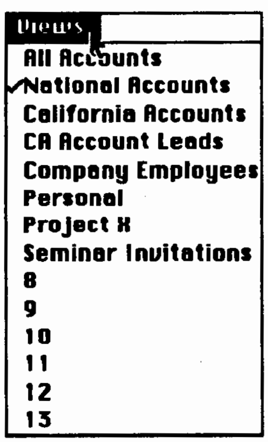
Check Views

Δ **To add an account to the view, point to the V column of an account, and click. For example, checkmark "Brodie."**

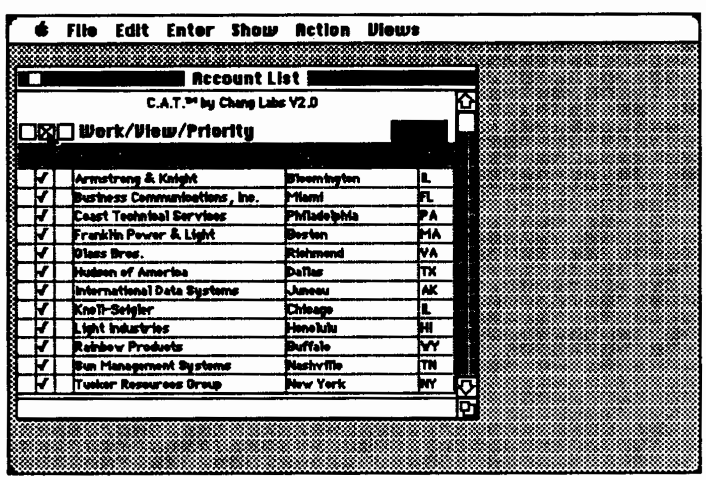
C.A.T. places a checkmark on that account.

Δ **To remove an account from a view, point to the V column of a checkmarked account and click. For example, uncheck "Franklin Power & Light."**

C.A.T. removes the checkmark on that account.



Δ **To see just the accounts in a view, select a view name from the Views menu. For example, select the "National Accounts" view.**



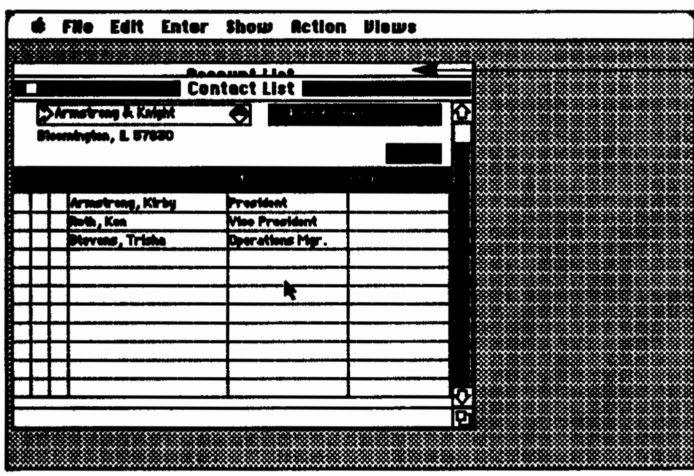
Use the Views menu to select other views of accounts. Each time, C.A.T. shows the accounts for that view, instantly.

You can also create views using the Make View command. It searches using criteria such as account name, city, state, or zip code. Or you can use the Merge Views command that combines multiple views using add, remove, intersect, or set operations. (See chapter 3.)

Contact Lists

Contacts are linked to accounts. The Contact List window shows all contacts for the current account.

Δ **Choose Contact List from the Show menu.**



Click here to activate the Account List window.

The window above shows all the contacts for the last account you selected.

You can select which account is displayed in the Contact List using three different methods:

Search by Clicking

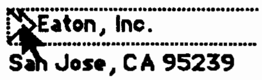
Δ **Select the account by pointing to and clicking on the account name in the Account List window. For example:**

1. **Activate the Account List window by clicking on any part of the Account List window that still shows on screen.**
2. **Click to select a different account.**
3. **Click a second time on the highlighted account name and C.A.T. zooms to show all contacts for this account.**

Click the top half to see the prior account.

Δ **Select the account by clicking the next button at the top of the Contact List window. With each click, C.A.T. shows the next account from the current view.**

Clairvoyant Search



Δ **Search for an account by typing its name in the clairvoyant field of the Account window.**

1. **Double-click the Goto arrow on the Contact List.**
2. **Search for the account.**
3. **Close the Account window.**

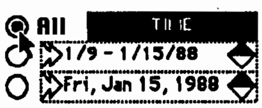
Note that the Contact List has columns on the left so that you can include contacts in the Work, current, and Priority views.

Event Lists

Events must be linked to a contact. The Events Snapshot window is used to show all events associated with a particular contact.

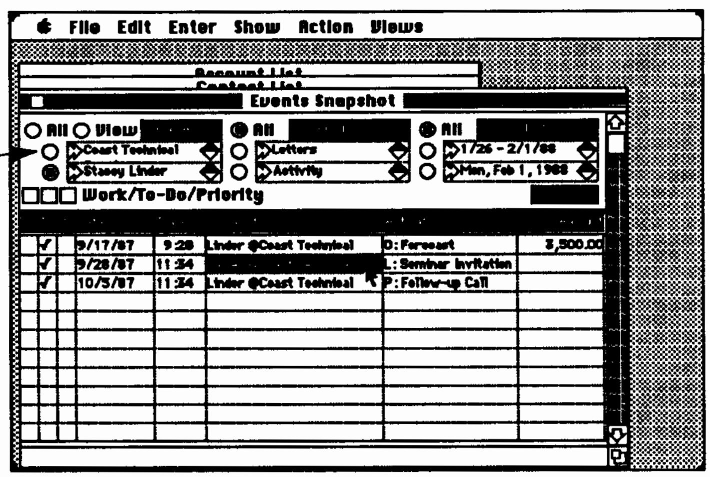
Δ **From the Contact List, click once to highlight a contact name.**

Δ **Click again on the highlighted name to zoom to the Events Snapshot window.**



Δ **Click the All Time radio button on the upper right.**

C.A.T. shows all events that are linked to this contact.



Click these radio buttons to change options.

Δ **To see all events linked to this account, click the radio button to the left of the account name.**

Δ **To see all events linked to all accounts in the *current view*, click the radio button next to the word "View."**

To select a specific account for the Events Snapshot window, C.A.T. offers the same three alternatives. They are:

- Click the Next button to see the next account for the current view.
- Select by highlighting an account on Account List, then reactivate the Events Snapshot window.
- Go to the Account window and search using the clairvoyant field.

We will spend more time with the Events Snapshot window later in this tutorial.

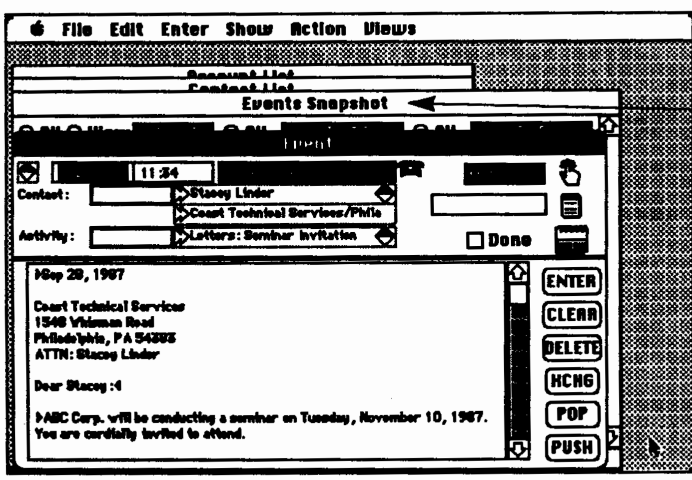
Event Record

From Events Snapshot:

Δ **Click to highlight an event.**

Δ **Click again on the highlighted event to zoom to the Event window.**

The Event window shows your selection. The top part of the window displays the contact, activity, and time for this event. The bottom note area contains any information associated with the event. It might contain a letter, simple notes, an order, contract information, or nothing at all.



Click to activate Events Snapshot.
Click to highlight another event.
Click again to see the event.

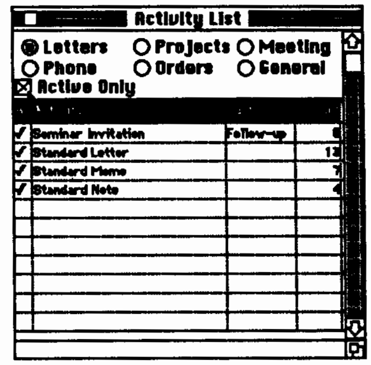
To see another event, you can either:

- Select by highlighting an event in Events Snapshot, and then clicking once. Or
- Click the Next button on the upper left of the Event window to see the next event.

Δ **Before proceeding to the next section, close the Event, Events Snapshot, Contact List, and Account List window.**

Activity Lists

The Activity List shows a list of user-defined activities. Activities are grouped into classes. The default classes are shown at the top of the window. You can change the class names (and the button names as well) using the Activity Class command under the Enter menu.



Δ **Click any of the radio buttons to show the list of activities for that class.**

Events Linked to an Activity

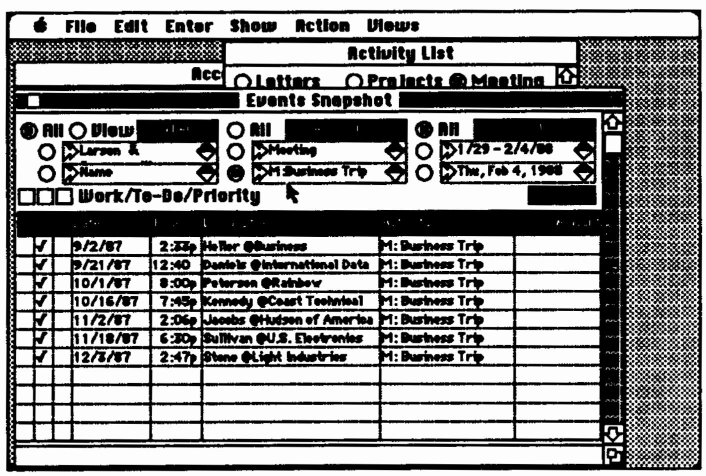
Event records are linked to contacts and activities. To see the list of events associated with a specific activity:

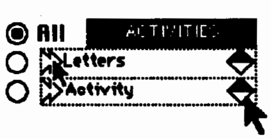
Δ **Click on any activity name from the Activity List.**

Δ **Click again on the highlighted activity.**

Δ **Click the All Contacts button on the upper left of Events Snapshot.**

C.A.T. zooms to show the Events Snapshot. The event list shows all events associated with this activity.





Δ **You can see all events for an activity class by clicking the Next button beside the class name.**

Δ **You can see all events for a different activity by clicking the Next button beside the activity name. Each time you click, C.A.T. shows the next activity for the current class.**

You can use activity records to manage projects such as mailings, seminars, or just personal information. When you need it, the relevant events appear on screen, instantly.

Time Management

C.A.T. also lets you review events by time period. You can select dates by clicking on the Calendar window.

Δ **If the Calendar is not on your screen, choose Calendar from the Show menu.**

The sample data has events dated from September 1987 through December 1987. In the instructions below, we will navigate you to that time period.

Selecting the Year

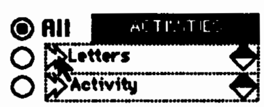
Δ **Click the year box to shift the calendar forward or backward until the two years <u>bracket</u> the year you want. (The year itself is displayed in the field at the top of the Calendar.)**

Selecting the Month

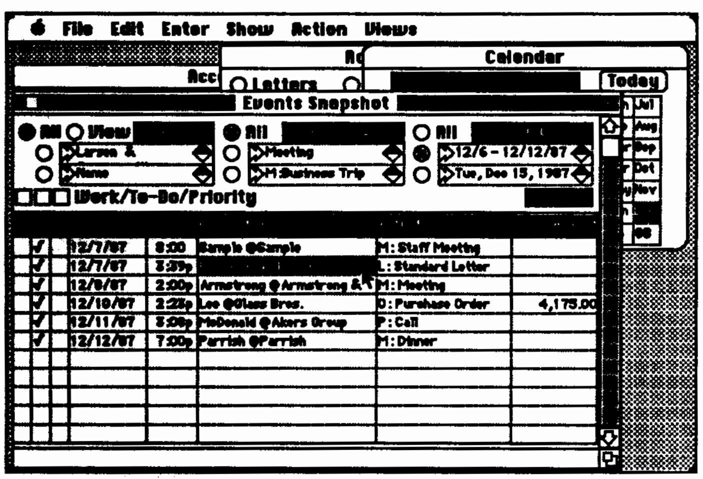
Δ **Click a month to highlight that month. Choose December.**

Δ **Click again on December.**

Δ **Click the All Activities button in the upper middle of the Events Snapshot window.**

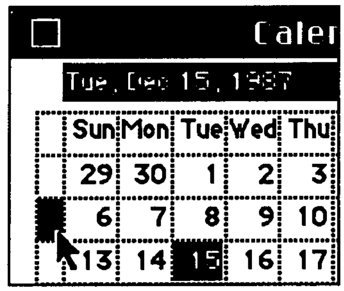


C.A.T. zooms to show all the events for the month of December 1987.



Selecting the Week

To see all events for a week:



- Δ **Click on the Calendar to activate the windcw.**
- Δ **Click on the box to the left of any week. C.A.T. zooms to show all the events for the week.**
- Δ **Click the Next button for the date range and C.A.T. shows all events for the next week.**

Selecting a Range

To see all events for a specific time period, from Events Snapshot:

- Δ **Double-click on the Go-to arrow for the date range.**
- Δ **C.A.T. displays a dialog box with a begin and end date. Enter a time range.**
- Δ **Click OK.**

Selecting the Day

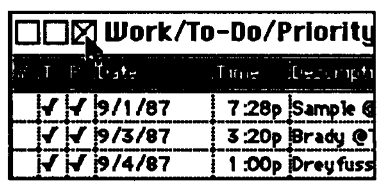
To see all events for a specific day:

- Δ **Click to activate the Calendar window.**
- Δ **Click to highlight a date.**
- Δ **Click again on the highlighted date to show all events for that day.**

To-do Lists

C.A.T. uses a series of check marks in the Events Snapshot window to classify items. On the left of the Events Snapshot, there are three columns.

You click to checkmark or uncheck Work, To-do, and Priority events.



- Δ **To see just events from one status group, click to place an "X" in the box above the column.**

C.A.T. shows the events selected.

Summary

To summarize the key concepts in this section:

- C.A.T. has four kinds of records: Accounts, Contacts, Events, and Activities. Records are linked.
- List windows let you select and manage records.
- Entry windows are used to search and enter records.
- The Next button shows the next record.
- The Goto arrow jumps to the appropriate list or entry window.

Entering Data

This section will show you how to set up your own C.A.T. database. It will show you how to:

- Enter account records;
- Add contacts to an account;
- Create activities;
- Create form letters;
- Enter events.

C.A.T. uses basic Macintosh techniques for editing text (such as inserting, deleting and selecting text). If you are new to the Macintosh or you want a refresher on these techniques, consult your Macintosh owner's guide.

Starting C.A.T.

To get C.A.T. up and running, do the following:

If you are starting C.A.T. from a hard disk:

1. **Click the C.A.T. icon in the Finder to select it.**
2. **Choose Open from the File menu.**
3. **When C.A.T. presents the choice of files to load, double-click the "Quick Start" icon.**

Or double-click the "Quick Start" data icon to open it.

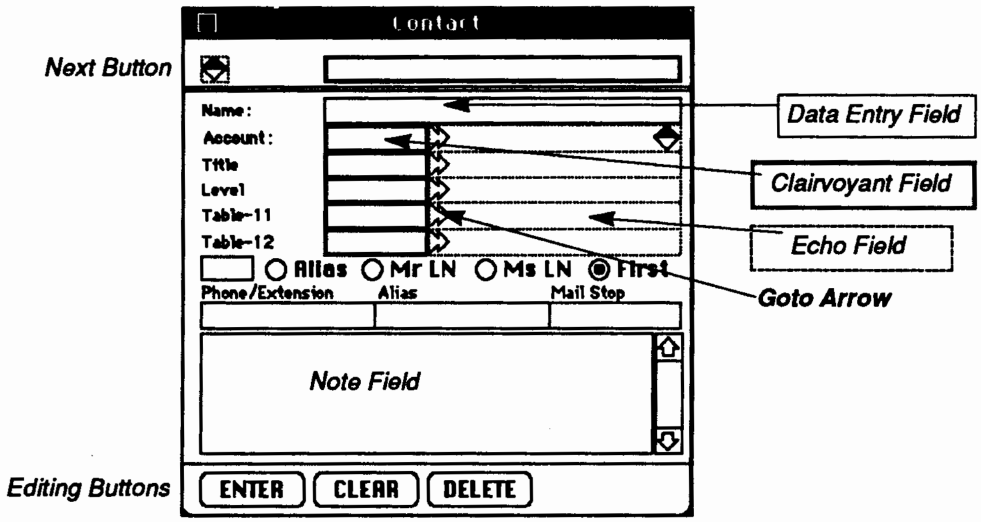
If you are using C.A.T. with one new 3.5-inch disk drive:

1. **Insert and open your "C.A.T. Work" disk.**
2. **Double-click the "Quick Start" icon.**

You can use the "Quick Start" to save time (it contains some preset report formats but no accounts or contacts.) Regard this as your own database. Choose Save As from the File menu to rename the file with your filename (e.g. "Jack's C.A.T."). In the future, to start C.A.T., follow the instructions above, but select your filename.

Fields & Buttons

C.A.T. Entry windows contain different types of fields and buttons. You use them to enter information, link to records, and make selections.



Type of Field

Type of Field	Border	Description
Data Entry Fields	Solid	Box for entering data.
Clairvoyant Fields	Heavy	Fields for linking records using clairvoyant search or by highlighting records. C.A.T. presents possible results in adjacent fields called Echo fields.
Echo Fields	Dotted	Box for displaying possible options when you type in an adjacent clairvoyant field.
Note Fields	Scroll	Box with scroll bars. You can enter up to 16 pages single-spaced in this box.

Type of Button	Description
Next button	Shows the next record when you click the bottom of the button (or press the PgDn key). Click the top (or press PgUp) to see the previous record.
Goto arrow	This button is a shortcut that takes you to other related windows.
Enter button	Records information to your C.A.T. file when you click on the Enter button (or press the Enter key).
Clear button	Removes the information from view without deleting it, when you click on the Clear button (or press the Clear key).
Delete button	Erases all the information in the record. You cannot undo a delete.
Push button	Enters current record and sets it aside in a "stack." You can push aside up to 100 records.
Pop button	Displays the records in the stack starting with the record on top.
Xchg button	Exchanges the current record with the record at the top of the stack.

Type of Button

ENTER

CLEAR

DELETE

Options & Preferences

Prior to entering data, do the following:

- Δ **Choose the Options command from the Enter menu and fill out the basic information on your company name and your name. Then click OK.**
- Δ **Choose the Preferences command from the Edit menu and change any item to suit your own need.**

Consult chapter 5, "Command Reference," of this manual, if you need help with these commands.

Entering Names, Addresses & Phone Numbers

To set up your C.A.T. files, start by gathering all sources of names and addresses of your contacts. We recommend that you enter the names by source. For example, enter all personal contacts, then customers, and finally vendors. For each category, create a view to let C.A.T. help you manage all your contacts.

- If your contact list is already in computerized form, consult the Appendix for instructions on importing and exporting.
- If your contacts need to be entered, simply choose New Account from the Enter menu and start typing. If you have a very large number to enter, consider hiring a temporary typist. Most can easily enter 120 names per hour.

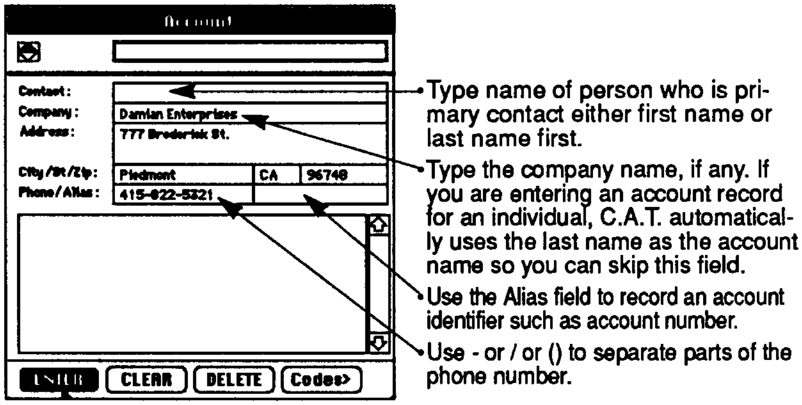
Adding Accounts

To enter a new account:

Δ **Entering account records**

1. **Select New Account from the Enter menu.**
2. **Enter your information in the appropriate spaces. To move the cursor to the next field, click the mouse in the field or use the tab key to move to it.**
3. **When you have finished entering the data for the record, click the Enter button.**

You can add information in the Account window at any time. Whenever you need to clear the window for new entries, click Clear.



Changing Account Data

To make changes to an account record you have already entered:

Δ Changing account records

1. Activate the Account window.

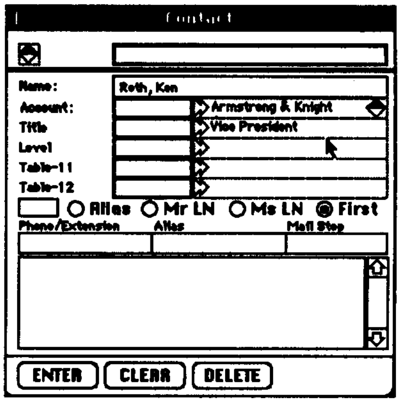
2. Find the account to change:

- **Either use the clairvoyant field at the top of the window.**
- **Or go to the Account List and select the account.**

3. Make the changes to your information.

4. When you have finished your changes, click the Enter button.

Adding Contacts



To add more contacts to an account:

Δ Adding contacts to an account record

1. Select New Contact from the Enter menu.

2. Type the name of the contact in the Name field. You can enter last name or first name first. C.A.T. automatically sorts the entry by last name.

3. Press the tab key or click once in the clairvoyant Account field.

If the right account name is not shown in the echo field, type the first few letters of the company name for this contact until the account shows in the echo field.

Alternatively, go to the Account List and click to select the account name. Once the account for which you are entering contacts is selected in the Account List window, it will appear in the echo field of the Contact window.

4. Press the tab key or click once in the Title field. Enter the title. If the title is already in the lookup table, C.A.T. will echo the title to the right. If not, continue typing the full title. When you click Enter, C.A.T. will ask you if you wish to add the title (code) to the lookup table.

The remaining table codes are optional. (See Chapter 3 for a full description of lookup tables.)

5. Click the Enter button to record the contact in C.A.T.

Changing Contact Data

To make changes to any contact records you have already entered:

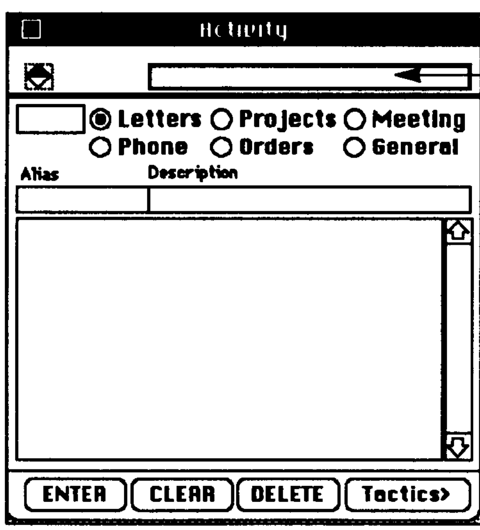
Δ **Changing Contact Records**

1. **Activate the Contact window.**
2. **Find the contact to change:**
   - **Either use the clairvoyant search field at the top.**
   - **Or go to the Contact List and select the contact.**
3. **Make any changes to your information in the appropriate spaces including reassigning the contact to a new account.**
4. **When you have finished changing the data for the record, click the Enter button.**

Creating Activities

Activity records are used to track projects. You create one activity for each type of project and use activities as you need them.

- If you have existing projects that you want to track in C.A.T., take each project and create an activity that describes it. Then enter the events for each contact involved.
- Otherwise, activities and events can be created as needed.
- **At a minimum, create one activity called "Standard Letter" and create one letter to tell us at Chang Labs that you are up and running and a registered user of C.A.T.**



Search for an existing activity using this clair-voyat field.

Appointment

To create a simple activity to track appointments or meetings:

Δ Creating a Simple Activity Record

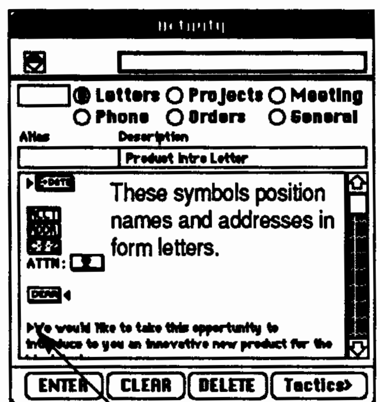
1. **Choose New Activity from the Enter menu.**
2. **Click the button next to the activity class for which you want to define a specific activity type.**
3. **Click in the Description field or use the tab to move your cursor to it.**
4. **Type the specific activity name (e.g., "Appointments" or "Staff Memos").**
5. **Click Enter.**

Form Letter

To create a form letter:

Δ Creating a Form Letter Activity

1. **Choose New Form Letter from the Enter menu.**
2. **Type the specific form letter name (e.g., "Standard Letter" or "Product Intro Letter").**



Insert the body of the form letter following the begin marker or delete the pair of block markers, here.

In the notes area of the Activity window, C.A.T. has already prepared two preset blocks that contain the address and closing of your letter.

The address block contains symbols that reference fields of your database. Please see chapter 3, "Managing Activities," for more examples about using these symbols.

3. **Click on the notes, and click to position the cursor following the ► in the body of the letter. Type the standard letter you want to appear as the form and click Enter.**

If you want to create a standard letter with just the address block, closing blocks, and no preset body, then delete the ► ◄ pair of characters and click Enter.

Note: Be sure to enclose all standard information for the form letter itself within block markers as indicated on the screen. To create a block marker, type Option . (Option-period) at the beginning of a piece of standard information (information that should appear on each copy of the form) and Option, (Option-comma) at the end of the piece of standard information.

A form letter can have multiple blocks. When you prepare a specific letter for one individual, you can insert personal paragraphs between blocks of the form letter.

Simple Form

You can enter blocks of text into the notes field of an activity to create a form. These forms can be used to manage a survey, track invoices, or keep information regarding outstanding purchase orders.

To create a simple form:

Δ **Creating a Form Activity**

1. **Choose New Activity from the Enter menu.**
2. **Click the button next to the activity class for which you want to define a specific activity type.**
3. **Click in the Description field or use the tab to move your cursor to it.**
4. **Type the specific activity name (e.g., "Purchase Contracts").**
5. **In the notes area of the Activity window, type the standard information you want to appear as the form and click Enter.**

Note: Be sure to enclose all standard information for each part of the form within block markers as indicated on the screen. To create a block marker, type Option . (Option-period) at the beginning of a piece of standard information (information that should appear on each copy of the form) and Option, (Option-comma) at the end of the piece of standard information.

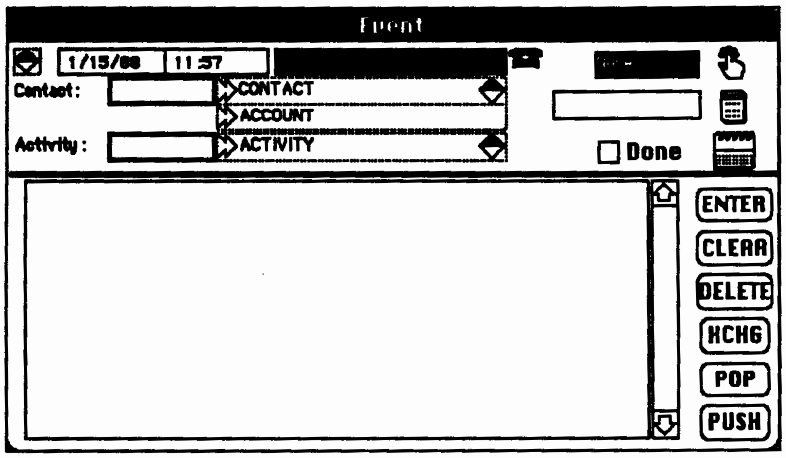
Entering Events

Events are used to log information. Each event is linked to a contact and an activity. And events are automatically time stamped with a date and time. For example, to record an appointment:

Entering An Appointment

∆ **Record An Appointment**

1. Choose New Event from the Enter menu.



2. Check the date in the first field in the Event window. If necessary, change the date to the date you want for the meeting. Then press the tab key to move to the time field.

3. Change the time to the time for the meeting and press the tab key to move to the contact field.

4. Begin typing the name of the person (first name or last) with whom you are scheduling a meeting. Stop typing when you see the name you want in the echo field and press the tab key.

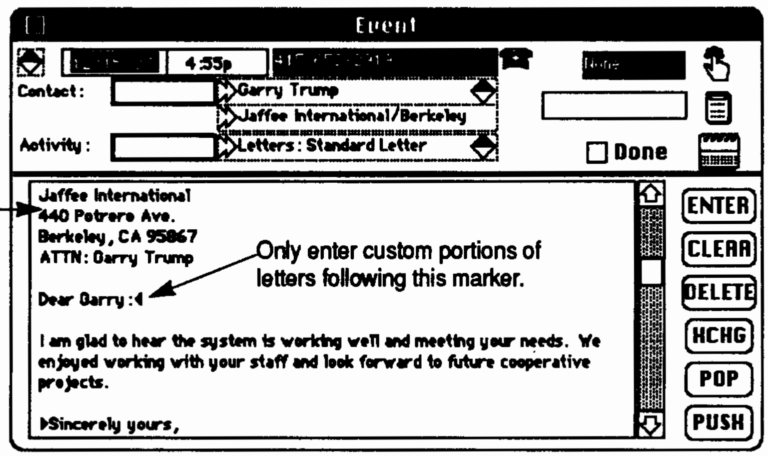
You can also search using the Next button in the echo field. For example, type the name "john." Since the database has lots of contacts named "john," click the Next button until the correct person shows on screen. If you jump past the name you want, click the top part of the Next button to go backwards.

5. Begin typing the name for the type of meeting you want to record. Press the tab key when the activity type in the Echo field is the one you want. If your meeting type is not defined, C.A.T. will prompt you to create an Activity record for it.

6. Type the information you want recorded regarding the meeting in the note field and click Enter.

Customizing a Form Letter

To use a form letter and customize the letter for one individual:



Use the Activity window if you wish to change the preset blocks of a form letter.

∆ Prepare a Letter for an Individual

1. Choose New Event from the Enter menu.

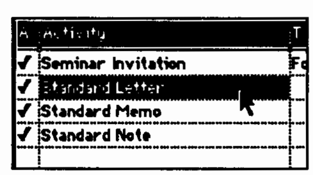
2. Click in the Contact field and begin typing the name of the contact to whom you want to send the letter.

If you have not already entered the contact record for this person into C.A.T., you can do so now by double-clicking on the Goto arrow next to the the Contact field. If you have not yet entered the address information for this person, then double-click on the Goto arrow next to the Account field. In either case, enter the record and close the entry window. In the Event window, click in the Contact field and the name you entered will show in the echo field.

3. Click in the Activity field and begin typing the name of the specific form letter such as the "Standard Letter."

Alternatively, highlight the letter you want using the Activity List window. First, single click the Goto arrow for the Activity field and C.A.T. shows the Activity List.

Single click to select the "Standard Letter" activity and close the Activity List window. The name of the activity and the contents of the form letter will be displayed in the Event window.



Note that the letter has already been customized with the date, name, and address information.

4. Type the custom contents of your letter in the notes field.

Be sure not to type between the block markers. The information between block markers is text that appears on every copy of this form letter. To change the preset text for this form letter, use the Activity window.

Custom parts of letters should be entered in the space after the ◀ marker following a block of text.

5. When you have finished typing, you can print the letter by selecting Print from the File menu, selecting the 'Letter/Memo/Note" option, and clicking Print. Alternatively, click Enter and print the letter later along with the other letters you prepare during a session.

Look in chapter 4 for detailed information on printing reports.

Summary

To summarize the key concepts in data entry:

- Data is entered using Entry windows.
- Contacts are linked to accounts; events are linked to contacts and activities.
- To link records, type in clairvoyance fields, point and click to highlighted records on List windows, or click the Next button until the record you need is found.
- Single-click on Goto buttons to show List windows and double-click to show Entry windows.
- Single-click on hightlighted records in List windows to zoom to the next List windows and double-click to show Entry windows.

Using C.A.T.

This chapter explains the advanced features of C.A.T. It shows you how to use C.A.T. commands to manage information, print form letters, and track your data. The chapter is divided into three sections:

- "Managing Contacts" shows you how to use views and lookup tables to organize your accounts and contacts.
- "Managing Activities" shows you how to use preset text and tactics to simplify routine tasks.
- "Managing Time and Events" focuses on how to use the Calendar and the Events Snapshot windows to retrieve information. Sample day-to-day events and examples of how to use C.A.T. to calculate amounts are also given.

Managing Contacts

This section describes how C.A.T. can track your interactions with the people you know. You will learn how to:

- Define views,
- Use lookup tables,
- Make views,
- Merge views, and
- Change views manually.

Accounts & Contacts

To review what you learned in previous chapters, account records contain an account name, address, phone number, and other account-related information. Accounts are entered in the Account window and displayed in the Account List window.

Each account can have an unlimited number of contacts. Contact records contain the names and specific information about individuals. Contacts are entered in the Contact window, which includes a field for you to link each person to his/her account. The contacts for each account are displayed in alphabetical order by last name in the Contact List window.

You can also record up to 16 single-spaced pages of notes for each and every account or contact.

Whenever you click on a highlighted account in the Account List window, C.A.T. zooms to the Contact List window to display all of the contacts for your selection.

About Views

You may have hundreds of contacts. How do you organize them to locate one quickly? You group the people you know by association. For example, you have "family," "friends," and "business associates"; you may also have "regional accounts," "clients," "press editors," etc. You think of people in terms of their association to some group.

What Is a View?

To help you manage your accounts and contacts, C.A.T. lets you create lists of accounts called views. A view is a list of accounts and contacts grouped together by association.

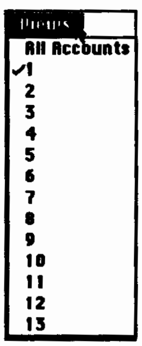
You also use views to print reports, do mailings, send an electronic list of records to an associate, produce labels, manipulate your data, and manage interactions with your contacts by groups.

Note that an account or contact can be associated with several views. For example, if you set up views of investors and customers, a contact who is both an investor in your company and a key customer could appear in both views.

Further, a view could contain the records for a single company with multiple locations. For example, you could create a view called "General Motors" to keep track of 20 different plant locations.

All views are saved to disk along with your data and are displayed in the Views menu. You can have up to 13 views at one time.

Views can be permanent, for regular use, or temporary, to perform simple searches or to support special projects. For example, you may want to find all accounts in California for a promotional mailing. All views can be redefined at any time to suit your needs.



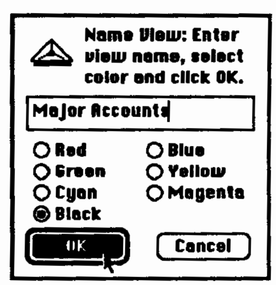
Selecting Views

The available views are listed in the Views menu. Until you assign a view name, the views are numbered from 1 to 13. To select a view, choose a view from the Views menu.

Naming Views

When you select a view, the Account List window is activated and the name of the view is displayed in the title bar.

To name a view or to change the name of a view, choose Name View from the Action menu. The following dialog box will appear:



Enter a name for the view; for example "Major Accounts." Next, if you are using a color monitor, select a color to use to distinguish the accounts in this view with color. Then click OK. The name is inserted into the Views menu and is shown in the title bar of the Account List window.

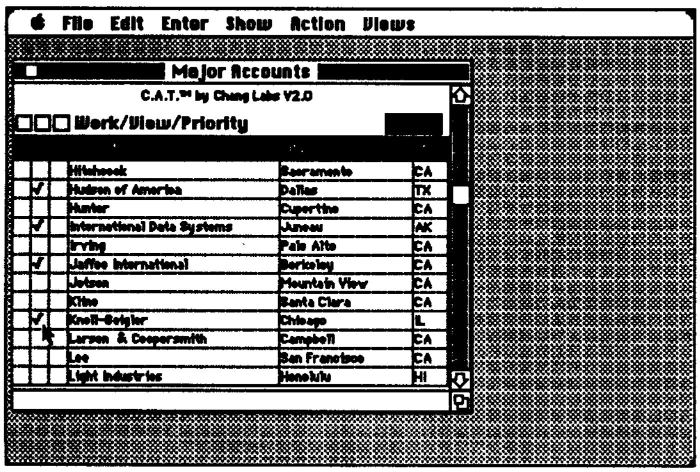
Creating Views

You can use any combination of three ways to create views:

- Use the mouse to point and click to place or remove a check mark (√) in the Work, View, and Priority columns of the Account List and Contact List windows.

- Choose the Make View command to search through account and contact records using specific criteria.
- Select the Merge Views command to work with multiple views to create a new view.

Each option will be described below.



Checkmarking (√) Accounts & Contacts

In the Account List and Contact List windows, C.A.T. shows three columns labeled **W**, **V**, and **P**. They are defined as follows:

W Work — Account and contact records that are checkmarked have been changed during the current session. As you either add a new record or change an existing record, it is automatically checked.

A new "current session" begins whenever you save to disk; and the check marks for the Work column are automatically cleared.

V Current — Accounts that are checked belong to the currently selected view from the Views menu. When you select a new view from the Views menu, the account and contacts for that view will show check marks in this column.

P Priority — A check mark by a name means the record has higher priority than others.

Priority is left to you to define. It is, in effect, just another view. Since it has its own column, Priority can be used in combination with another view, to let you be even more selective.

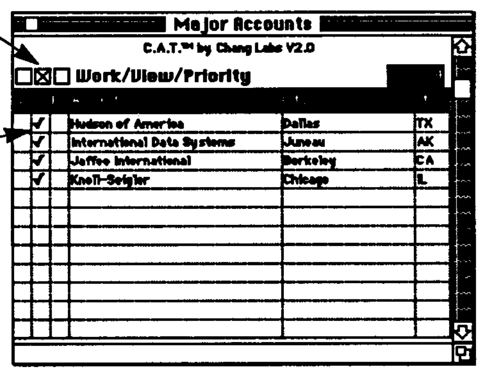
You control which accounts to show on the Account List window by checking the three boxes on the upper left. These boxes let you select to see:

- Work accounts only,
- Current view accounts only,
- Priority accounts only, or
- Any combination of the three.

To change the status of any box, point and click to check or uncheck the three boxes (i.e., add or remove the "X"). For example, point to select the check box for the current view.

Click on check box to select view.

Click on columns to check records.



Checking (√) Records

You can add or remove check marks (√) from account and contact records. To check any item, point with the mouse and click.

To remove a check mark, point to the check mark and click.

You can use pointing and clicking to check accounts and contacts to make a view. You can also change existing views using the same procedure.

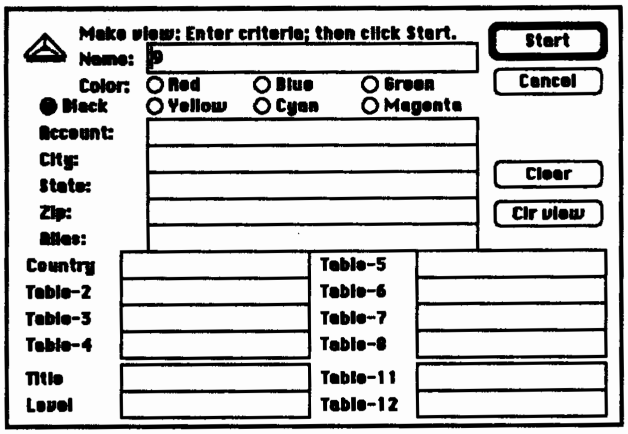
Creating Views

To create a view manually:

- Select a view from the Views menu.
- Choose Name View from the Action menu to assign a name.
- Uncheck the V box on Account List to show all accounts.
- Checkmark each account to be included in the view, in the V column. You may want to check each contact to make sure specific individuals are included in the view.
- Check the V box on the Account List window to see all accounts for the new view.

Make View

The Make View command lets you create views automatically, using search criteria. For example, you can search for specific zip codes. To use Make View, first select a view from the Views menu, then choose Make View from the Action menu. The following dialog box will appear:



The first field is used to enter a name for the view. The name entered here will replace the number or name displayed in the Views menu.

Next, if you are using a color monitor, select a color to use to distinguish the accounts and contacts in this view.

Make View Buttons

The buttons in the upper right are used to:

Start	**the selection process and create the view.**
Cancel	**the Make View operation.**
Clear	**all of the fields in the dialog box for new entries.**
Clr View	**removes all accounts and contacts from the current view.**

Selection Criteria

The remaining fields are for you to enter selection criteria. Your criteria can include information from any of the fields in your account records such as account name, city, state, zip, or alias.

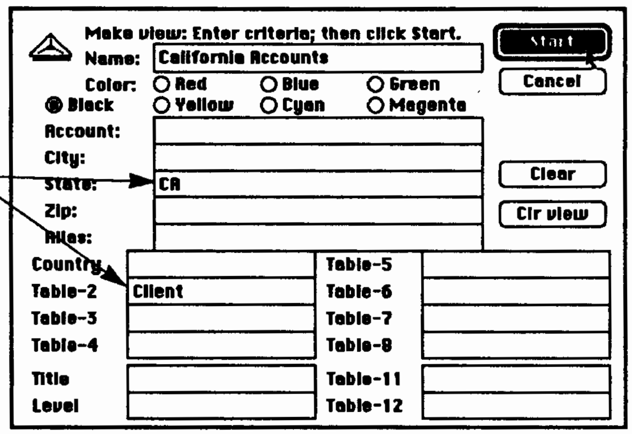
For example, if you want a view of all contacts in the state of California, click in the State field and type "CA."

You can enter as many criteria as you need. *Each criterion makes the view more selective.*

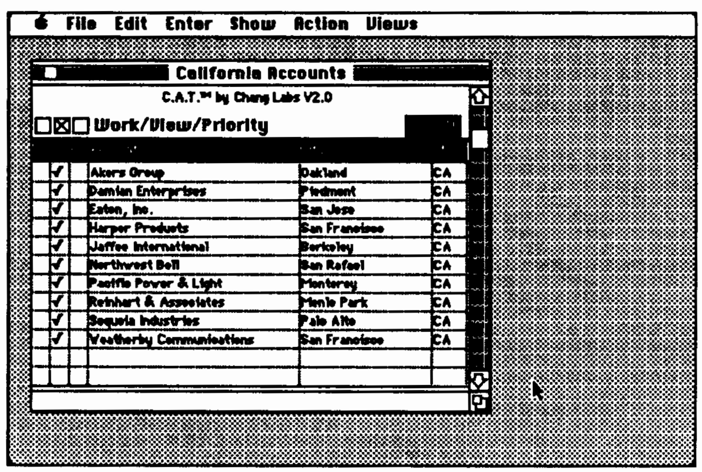
In the lower half of the dialog box, you can make the search even more specific by entering codes from lookup tables. A lookup table is a list of codes used to categorize your records. Lookup tables are described at the end of this section.

After entering your criteria, click the Start button.

Search for all clients in California.



In a few seconds, C.A.T. will display the results in the Account List window.



Compound Criteria for Views

C.A.T. can also search for a range of values. For example, you can select:

- All accounts in the states of California, Oregon, and Washington by entering **CA|OR|WA** in the State field.
- All zip codes less than 50000 by entering **<50000** in the Zip field.
- All account names that start with the letter C or K or any letter in between by entering **c..k** in the Account field

Make View Operators

Symbols combined with key words can be used to specify selection ranges. These symbols, called **operators**, are described below:

Operator	Example	Meaning
(text only)	ABC	Starts with the letters "ABC"
=	=ABC	Exactly equal to "ABC" including spaces.
>	>ABC	Greater than "ABC"
<	<ABC	Less than "ABC"
>=	>=ABC	Greater than or equal to "ABC"
<=	<=ABC	Less than or equal to "ABC"
?	?ABC	Contains the letters "ABC"
..	ABC..XYZ	Range from "ABC" to "XYZ"

If you leave a field blank, this means no selection criteria are specified, and all accounts and contacts meet the criteria. If all fields are left blank, then all accounts and contacts will be included in the current View.

Modifiers

In addition to operators, C.A.T. also allows the following **modifiers**:

<table>
<tr><th>Modifier</th><th>Example</th><th>Meaning</th></tr>
<tr><td>|</td><td>A|B|C</td><td>Words starting with "A" or "B" or "C" all pass the selection criteria.</td></tr>
<tr><td></td><td>A|>N|?X</td><td>Starts with "A" or greater than "N" or contains "X".</td></tr>
<tr><td colspan="3">(To enter the | modifier, press the Shift and \ keys simultaneously.)</td></tr>
<tr><td>/</td><td>/ABC</td><td>Does not start with "ABC"</td></tr>
<tr><td></td><td>/>ABC</td><td>Not greater than "ABC"</td></tr>
</table>

Notes on Criteria

When entering criteria, note the following:

- Make View looks for all records that start with the text you enter as your selection test. For example, if you entered "com" in a field, the codes "commercial" and "communication" would pass the test. However, the code "intercom" would not pass since the letters "com" are contained within the code value.
- Make View is not "case" sensitive, meaning it does not differentiate uppercase and lowercase text. "ABC" would match "abc," "Abc," or "abC."
- With range comparisons, Make View follows strictly the Macintosh sort sequencing. Numbers precede the alphabet. Therefore, "A" is less than "A1" and "A1 less than "AA." A null value (i.e., no value for a field) is the smallest value.
- International characters are sequenced according to Macintosh sort sequencing.
- Make View does not permit the use of multiple "range" operators (..) separated by the "or" modifier (|). For example, "A..B|X..Z" is not permitted. However, "A|B|X|Y|Z" produces the same result and is permitted.
- The = operator can be used to find all records with blank fields. For example, you might want to find all records that are missing zip codes. If you enter just "=" in the Zip code field, C.A.T. will look for all records that have no values (or null input) in that field.

Changing View Criteria

You can change criteria any time you want to modify views. First select the view to be changed, from the Views menu. Then choose Make View from the Action menu. Enter your changes and click Start. C.A.T. will automatically search using the new criteria and display the new view in the Account List window.

View Membership

When you specify criteria for a view, C.A.T. saves these criteria on disk along with your data. When you enter a new account or contact record, C.A.T. automatically checks the criteria of all views to see if the record belongs in each view. This allows you to automate the maintenance of views as you enter new information.

For example, you could enter "Apple" in the Account Name field to create a view of all Apple offices. As you enter new account records, if the account name begins with "Apple," C.A.T. will automatically make that account a member of the Apple view.

When new account or contact records are entered, C.A.T. checks the selection criteria for *all* views and determines if the account or contact should be added to each view.

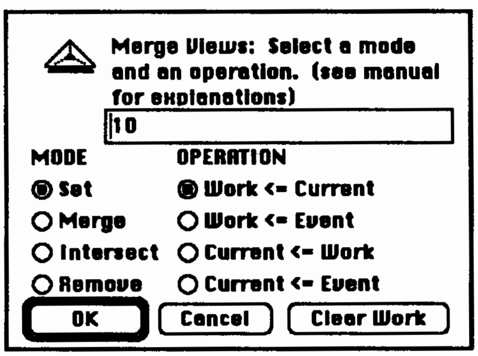
However, to prevent changing manually created views, C.A.T. does not check view membership for existing records that have been modified. In this case, you could click in the View column to manually correct the view membership.

When creating a view, note that view membership of contacts is solely controlled by the four lookup tables at the bottom of the Make View dialog box. When those four fields are left blank, this means that all contacts for the account will be included in the view. (If you are preparing a mailing, this means every contact associated with the account will receive his or her own copy of the mailing. In this case, manually review each account's Contact List and add check marks so that the appropriate contacts will receive your mailing.)

Merge Views

The Merge Views command allows you to work with views in the Account List and Events Snapshot windows to create a new view.

When you choose the Merge Views command from the Action menu, a dialog box will appear:



The Mode controls how you combine two views. Modes include:

Modes

Mode	Explanation
Set	One review replaces another.
Merge	Merge one view with another to create a combined view.
Intersect	Intersect to find the common members of two views.
Remove	Remove common members of one view from another.

The Operation tells C.A.T. which two views to use. The view to the left of the "<=" symbol is the one that will be created as a result of the merge.

Merge View Operations

Each view is defined as follows:

View	Explanation
Work	**The Work view is a transient view. (It normally accumulates all new and changed records from the current session.)**
Current	**The Current view is the view currently selected from the Views menu.**

If necessary, click Cancel in the Merge Views dialog box to return to the main screen and select a different view.

View	Explanation
Event	**The Event view is the list of events currently displayed in the Event Snapshot window.**

If you select the "Set" mode and the "Work<=Current" operation, C.A.T. will replace the Work view with the Current view. This means that after the merge, members of the Current view will also be members of the Work view. Each record will have a check mark in the Work column of the Account List and Contact List windows.

If you select the "Remove" mode and the "Current<=Work" operation, C.A.T. will remove all members of the Work view from the Current view and save the result in the Current view. Each record will have a check mark in the **V** column of the Account List and Contact List windows.

If you select the "Merge" mode and the "Work<=Event" operation, C.A.T. will merge all members who have one or more events currently displayed in the Events Snapshot window with the members in the Work view, and temporarily hold the results in the Work view. Each record will have check mark in the **W** column of the Account List and Contact List windows.

After you select a Mode and an Operation, click OK to begin the merge. A dialog box will appear showing the number of records merged. The view created as a result of the merge will be displayed in the Account List window.

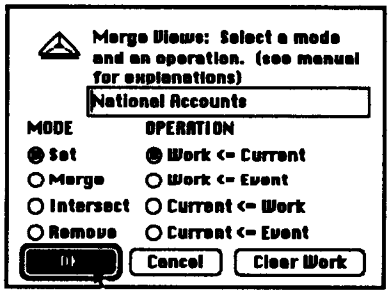
Notes on Merging

The Merge Views command is designed to help you create views in a step-by-step process. In order to get the view you want, you may need to move a view into the Work view, select another view, and choose Merge Views again to combine the two views. Finally, you can save the resulting Work view as a permanent view. Use the Set mode to move it back to the **V** column, where it can be saved.

For example, suppose you have a "California Accounts" view and a "National Accounts" view that you want to combine for a special mailing. First choose the "National Accounts" view from the Views menu; it will appear in the Account List window as the current View. Then choose the Merge Views command:

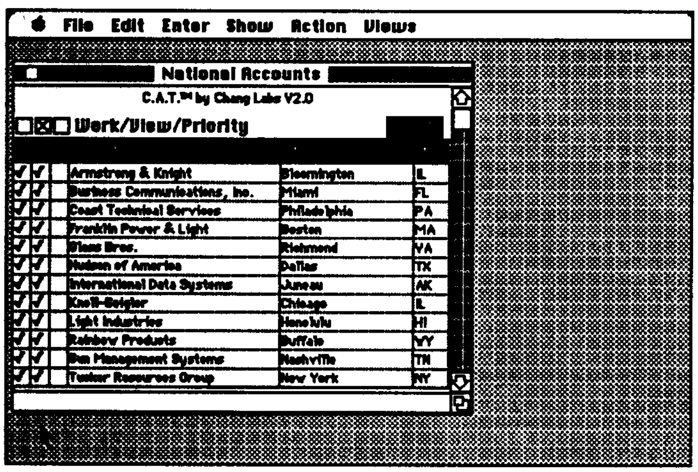
Merge Example

A dialog box will appear. To make "National Accounts" the Work View, select the Set mode and the Work<=Current Operation, then click OK.



Another dialog box will appear showing the number of accounts merged. Click or press any key to continue.

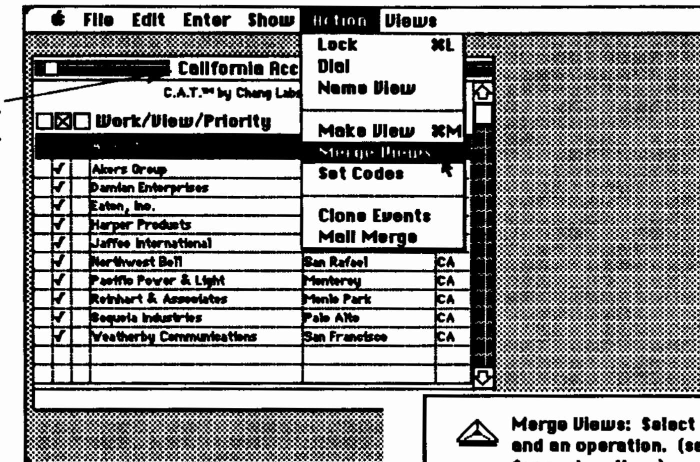
Every account in the view will be checked in the Work column, meaning "National Accounts" is now the Work view.

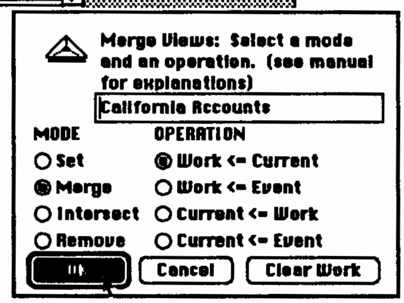


Next choose "California Accounts" from the Views menu; and it will appear in the Account List as the current view.

Choose Merge Views again.

Current view is "California Accounts".
Work view still holds "National Accounts".



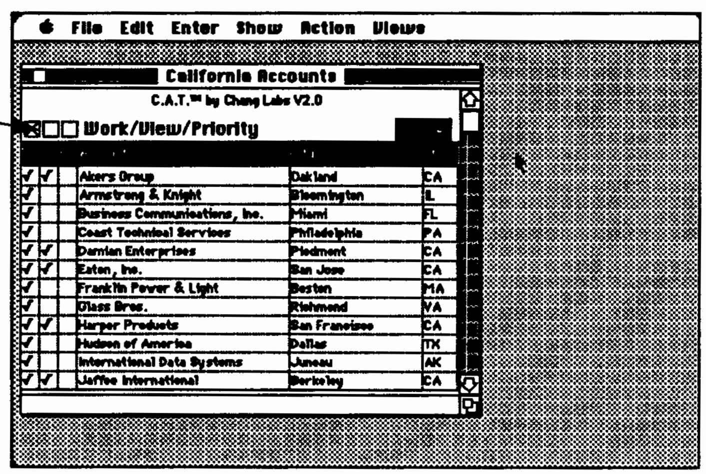


To merge "California Accounts" with "National Accounts," which is now the Work view, select the Merge mode and the Work<=Current options in the dialog box and click OK.

Another dialog box will appear showing the number of accounts merged. Click or press any key to continue.

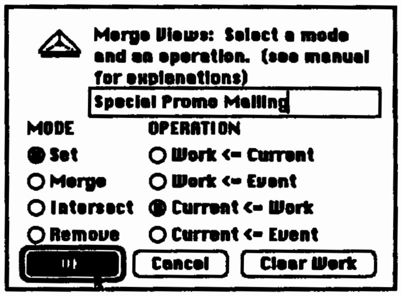
In the Account List window, click to check the box above the Work column. Then click to uncheck the box above the view column. You will see all of the accounts in the Work view.

Work view contains merged view.



To save the view, choose an undefined view from the Views menu and choose Merge Views once more.

Enter a name, in this example, "Special Promo Mailing." Then select the Set mode and the Current<=Work operation to make the Work view the current view.



A dialog box will appear, showing the number of accounts merged. Click or press any key to continue.

Your new view will be displayed in the Account List window and saved when you save to disk.

Similarly, you can manipulate the Events Snapshot window in steps to create a highly selective list of accounts. The Merge Views command facilitates using all of the information in C.A.T. to create views.

Lookup Table

A lookup table is a list of codes used to categorize your accounts and contacts. You can set up eight tables (1 through 8) for accounts and four tables (9 through 12) for contacts. Each table can contain as many codes as you need. Codes can be any attribute that you want to use to categorize accounts or contacts. Before explaining how to create a table, let's look at the ways they can work for you.

For example, to categorize your accounts, you could create a table named "Groups" with the following codes:

Table Name: Groups

Codes: **Dealers**
Investors
Key customers
Personal
Press
Vendors

Then by linking the appropriate code to each account record, you could search on "Group" using Make View to create six permanent views with the same names.

Country Table

Table 1 has been preassigned to contain "Country" codes. If you have international contacts, you should:

- Enter the names of each country in this table.
- Enter the appropriate country code in each account record.
- Select the "Country table" option under Preferences (see the Edit menu).
- Select your "Label Options" also under Preferences to print country names on mailing labels.

If you do not need country codes, you can redefine table 1 and use it for some other purpose.

Sample Tables for Accounts

Here are some tables that you might define for account records.

Channel	Industry	Size (Employees)
National	Finance	A-Large: more than 1000
Retail	Manufacturing	B-Mid market: 100-999
Wholesale	Mining	C-Small: fewer than 100
Trading	Service	

You can also define tables to gather information for market research. For example:

County	Net Worth	Age of Business
Alameda	A: <$100,000	A: under 5 years
Marin	B: $100,000-$500,000	B: 6 to 10
San Francisco	C: $500,000-$1million	C: 11 to 15
San Mateo	D: >$1million	D: 16 to 20
Santa Clara		E: over 20

Sample Tables for Contacts

Table 9 has been preassigned to contain "Title" codes. Here are examples of titles you might enter:

Assistant	Editor	Publisher
CEO	Editor In Chief	Receptionist
CFO	Executive VP	Secretary
COO	Manager	Senior VP
Controller	Owner	Vice-President
Director	President	

The following tables may give you ideas for supporting your views of contacts:

Department	Level
Administration	Buyer
Engineering	Primary
Finance	Secondary
Marketing	VIP
MIS	
Research & Development	
Sales	

Like account lookup tables, contact tables can be defined for market research. For example, you could set up the following tables to support temporary views:

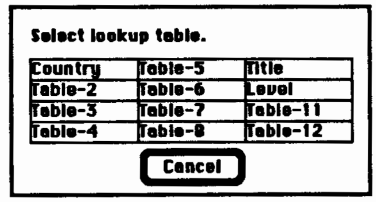
Orientation	Education	Profession
Conservative	High school	Academia
Moderate	College	Biotech
Risk-taker	Master's	Computer
	Ph. D.	Engineering
		Finance
		Law
		Medical
		Real Estate

Defining Tables

To create a lookup table, choose the Lookup Table command from the Enter menu. The following dialog box will appear:

- Tables 1 through 8 are for account records.
- Tables 9 through 12 are for contact records.

Click to select a number and the Lookup Table window will appear.

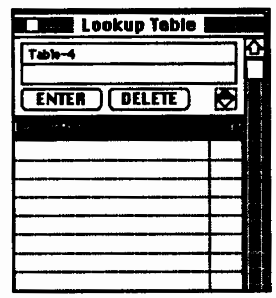


Entering Codes

In the first field at the top of the window, enter the title for the table. This title will appear in the Codes window and Make View dialog box.

In the second field, enter a code and click Enter.

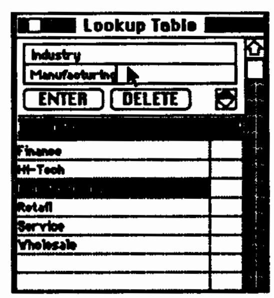
Continue to enter codes as needed and click the Enter button after each entry. C.A.T. will automatically alphabetize and list each code under the Description heading.



Changing Codes

You can change codes whenever necessary. Just display the lookup table that contains the code to be changed, click once to select the code and it will appear in the second field at the top of the window.

Make your changes and click Enter. Note that the new code will replace the old one in all of the records that contained the original code.



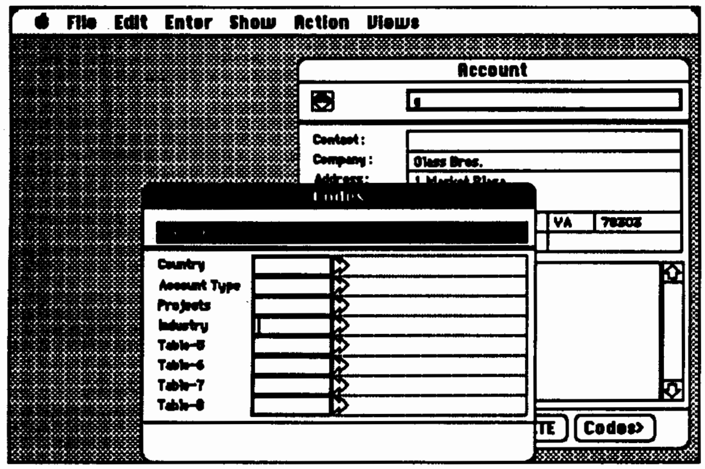
Deleting Codes

Select the code to be deleted in the Lookup Table window, then click the Delete button. C.A.T. will ask you to confirm the action. Click as appropriate.

Linking Accounts to Codes

Once your lookup tables for accounts are set up, you can link one of the codes in each table to each account record. To enter codes, you must first display an existing or new account in the Account window. Then click the Codes> button.

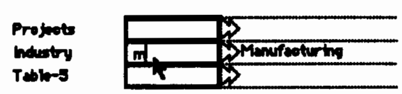
The Codes window will appear with one field for each of the Tables 1 through 8.



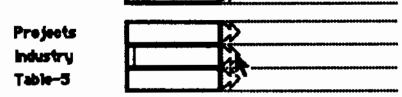
If you named your tables, the titles will appear beside each field in this window.

To entèr codes, you can:

- Type the code in the clairvoyant field, and C.A.T. will display names that match in the echo field; or



- Click the Goto arrow beside the table you want and that lookup table will appear. Double-click on the code you want and it will be linked to the field in the Codes window.

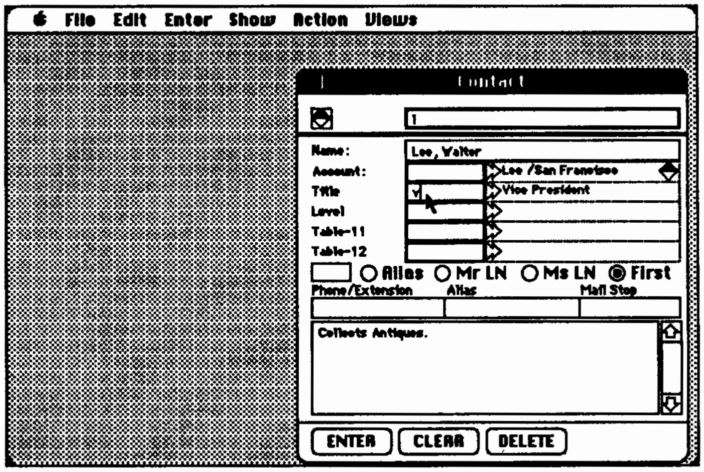


After you link codes, activate the Account window and click Enter.

Linking Contacts to Codes

You can link one of the codes in each table to each contact record. To enter codes, you must first display an existing or new contact in the Contact window.

There is one field for each of the tables 9 through 12. If you named your tables, the titles will appear beside the fields in this window.



To enter codes, you can:

- Type the code in the clairvoyant field; and C.A.T. will display names that match in the echo field; or
- Click the Goto arrow beside the table you want to see and that lookup table will appear. Double-click on the code you want and it will be linked to the field in the Contact window.

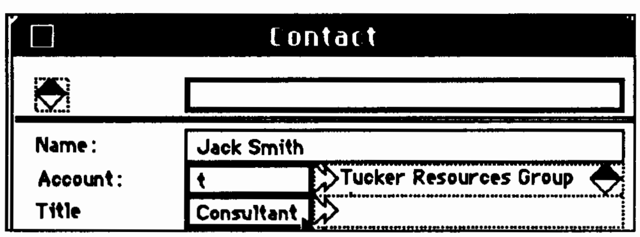
After you link codes, click Enter.

Automatic Code Entry

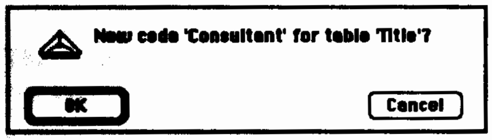
Once you define what a lookup table will contain (e.g., you decide that table 9 will contain title codes), C.A.T. makes it easy for you to add new codes to the table automatically.

Choose the Preferences command from the Edit menu and a dialog box will appear. Select the "Automatically create codes..." option and click OK.

Once this option is set, you can enter new codes directly in the Codes window for accounts and in the Contact window for contacts. For example, suppose you are entering information for a new contact, "Jack Jones," in the Contact window. Jack's title is "Consultant." You could type "Consultant" directly in the clairvoyant Title field:



When you click Enter, C.A.T. will discover that the code is new and display a dialog box:



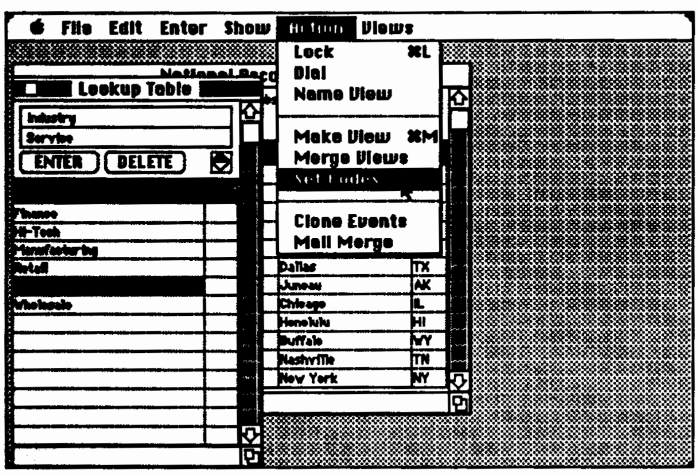
Click OK and the code will be added to the appropriate lookup table. Similarly, codes can be entered in the Codes window for accounts.

Set Codes

The Set Codes command makes it easy for you to enter codes for more than one account or contact at a time.

First choose a view from the Views menu. It will appear in the Account List window as the current view. Then:

- Choose Lookup Table from the Enter menu.
- Select the table that contains the code you want.
- Click once to highlight the code in the Lookup Table window.
- Then choose Set Codes from the Action menu as shown in the following screen:



A dialog box will appear to let you confirm the action:

Click OK and the code will be linked to every account or contact in the current View.

Managing Activities

This section describes how you can use activities to keep track of any subject matter in C.A.T. You will learn how to:

- Define activity classes and types of activities;
- Create form letters;
- Use mail merge;
- Set up routine preliminary or follow-up activities; and
- Use activities to manage projects.

About Activities

An activity in C.A.T. is defined as "any subject matter." C.A.T. lets you create activities to keep track of any information you want.

Activity Class

Think about the things you do in the course of your work and the kinds of information you need to keep track of. In general, you probably spend much of your time on the *phone*, writing *letters*, and attending *meetings*. These items in italics are examples of "activity classes."

Every activity must belong to one of six Activity Classes.

Activity types

Within each class, what variations or types of the activity do you have? For example:

- When using the phone, you may receive *inquiries* or *presale calls;* you may make *prospecting calls, follow-up calls*, or want to keep notes of phone conversations with certain people.
- When you write letters, you may have an *introductory letter*, an *offer letter*, a *thank-you letter, personal letters*, or *form letters* that you routinely send out.
- For meetings, you might have *appointments;* or attend *staff meetings, committee meetings, strategy meetings*, or *board meetings.*

These items in italics are all examples of activities. In fact, activity records can be used to track any information, including *birthdays, expense reports, project notes, marketing ideas*, and lists of *things to do.*

User-Specific Activities

Different users have different information-tracking needs:

- A Consultant could set up activities called "Proposal," "Hearing," "Notice," or "Time" (to keep track of billable time).
- A Personnel Manager could have activities called "Salary," "Wage Review," "Insurance," "Vacation," and "Sick Leave."
- A Paralegal might have activities called "Research," "Court Appearance," "Deposition," and "Pleas."
- A CEO might have "Board Meeting," "Statistics," "Investments," "Acquisitions," and "Mergers" as activities.
- A Sales Manager could have "Prospecting Call," "Sales Lead," "Purchase Orders," and "Returns."

C.A.T. lets you set up activities to suit your own needs.

Project-Related Activities

When you start a new project, think about your information needs and create a set of activities that will help you track them. For example:

- If you want to plan a seminar, set up an activity called "Seminar Invitation" that contains a form letter to invite participants and another activity called "Confirmed" to record confirmations.
- If you want to do a phone survey and need to record responses, set up an activity called "Survey" and then create events (using "Survey" as the activity) to record each contact's responses.
- To plan a fund-raiser, you might set up activities called "Invitation," "Follow-up Call," and "Donations".

Form Type Activities

Activities can also be a form. For example, you could set up:

- form letters,
- order forms,
- surveys, and
- expense reports.

You decide what activities are relevant for your business, and create records for them as the need arises. Activities are entered in the Activity window and displayed by class in the Activity List window.

About Events

An event in C.A.T. is a record of an activity (which can be any subject matter) with a specific contact on a specific date and time. For example:

- You make a follow-up call to Joe Chin at 3:00 PM on 9/17.
- You send an offer letter to Sally Smith at 4:30 PM on 10/14.
- You schedule a staff meeting for 9:00 AM on11/21.
- You jot down notes for marketing ideas at 7:00 PM on 12/5.
- You record the birthday of your best friend on 3/4.

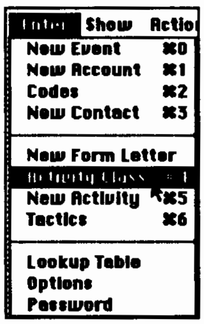
Every event is linked to a contact, activity, and time. In the staff meeting and marketing ideas examples above, "you" are the contact.

The use of events and the Events Snapshot window are described in the next section.

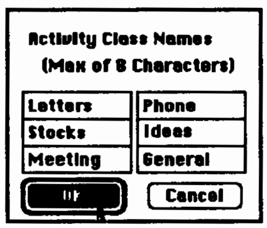
Activity Class

Activities are grouped into six classes. Initially, C.A.T. provides the following: Letters, Phone, Orders, Stats, Meeting, and General.

These classes are suggestions only and can be changed to suit your own needs. For example, you could set up "Stocks" as a class and list individual securities as activities. Or you could set up "Ideas" as a class and create activities for different subject matters to help you collect information by topic.

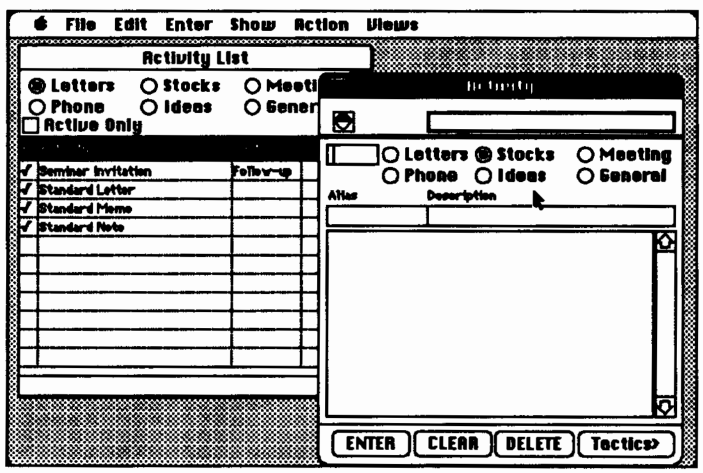


To change the class names, choose Activity Class from the Enter menu and a dialog box will appear.



Use standard Macintosh editing conventions to make your changes. Class names can be no more that eight characters long. After you make your changes, click OK.

The new class names will automatically appear in the Activity and Activity List windows as shown in the following screen:



Creating Activity Records

All activities are entered in the Activity window.

For every activity, you must select a class and enter a Description. The Note field in this window is used to enter preset text and references (described next) for form letters and other information that you would like to standardize. This is the only field in C.A.T. where preset text and references may be entered.

Preset Text

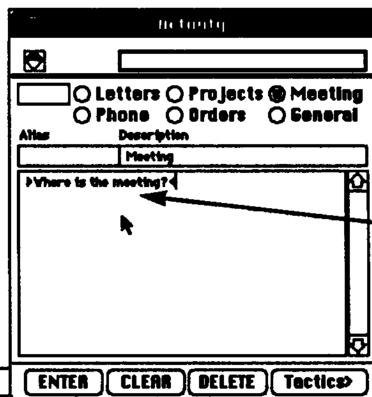
Preset text is any text that you want to set up in advance and use repeatedly. For example, preset text can be a form letter, a data sheet, a marketing survey, or an order form.

Text Blocks

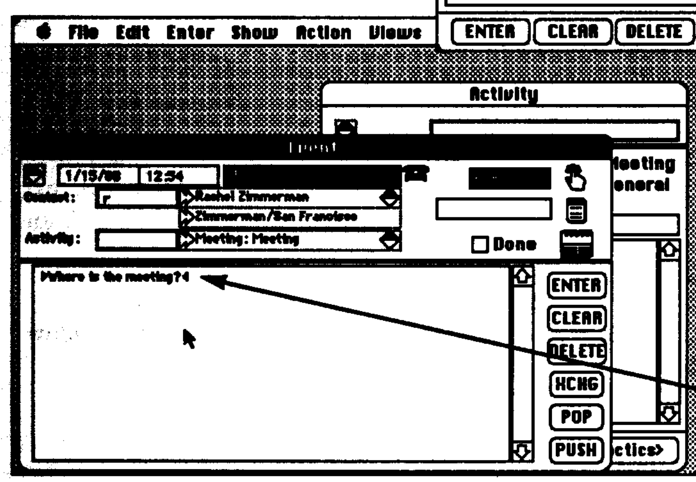
Preset text is organized into blocks. A block must begin with a "►" marker (Option .) and end with the "◄" marker (Option ,). Any text in this Note field that is not enclosed by markers will be ignored.

As a simple example, the activity called "Meeting" shown below includes a reminder question in the Note field:

Every time you enter an event using "Meeting" as the activity, "► Where is the meeting? ◄" will appear in the Note field of the Event window:



In Activity, enter preset text inside text block markers.

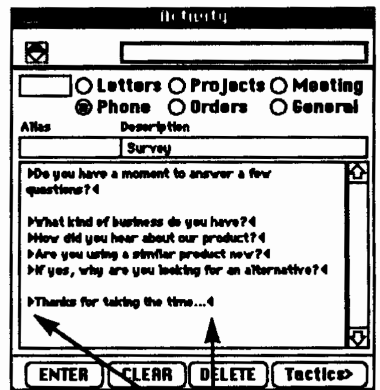


In Event, enter your response following the end marker.

Thus you will always remind yourself to ask for the location of the meeting and type it in the Note field.

Sample Survey

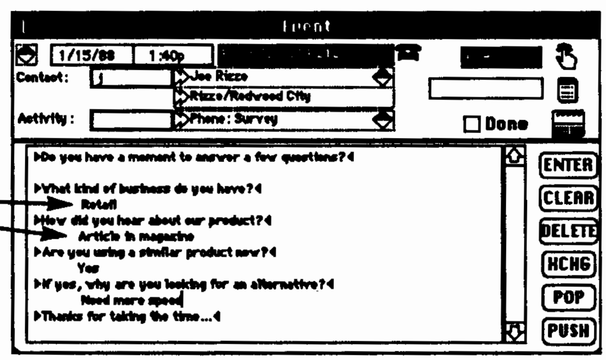
Preset text can also include multiple blocks of text (up to 256 blocks). Each block is designated by the ▶ and ◀ markers. For example, blocks can contain a series of questions for a quick phone survey. The activity called "Survey" shown below includes questions in the Note field:



Every block of preset text must begin with a ▶ and end with a ◀.

To conduct the survey, you would create an event using "Survey" as the activity and enter the name of the person being surveyed as the contact. The preset text blocks will automatically appear in the Note field of the Event window.

While you have the contact on the phone, you can type his/her answers directly in the Note field; just use standard Macintosh editing conventions:



Responses entered after end markers.

You can enter as many lines of text as needed, as long as the answers are outside of the markers. Here in the Event window, text inserted between the ▶ and ◀ block markers will be ignored and not saved.

Note that preset text cannot be changed in the Event window. Preset text can only be entered and changed in the Activity window.

Text blocks can also contain references. References are graphic symbols used to represent fields of information from your account and contact records. For example, the F-NME symbol represents the first name of a contact and ADDR symbol represents the address of an account. You can use references to include a contact's name and address in letters automatically.

References

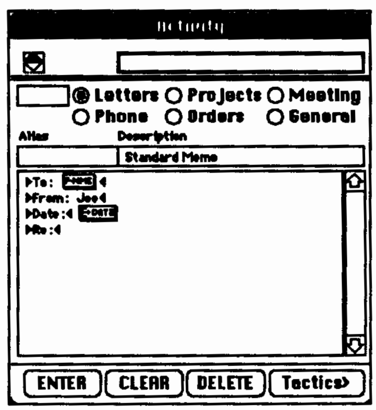
To enter references, you press combinations of keys called "Hot Keys." For example, if you press the Option key and the letter "o" (lower-case) simultaneously, the F-NME reference will appear. When you press the Shift, Option, and "=" (equal sign) keys simultaneously, the ADDR reference will be displayed.

Here is a list of the most commonly used references and their Hot Keys. A complete list is provided in Appendix B.

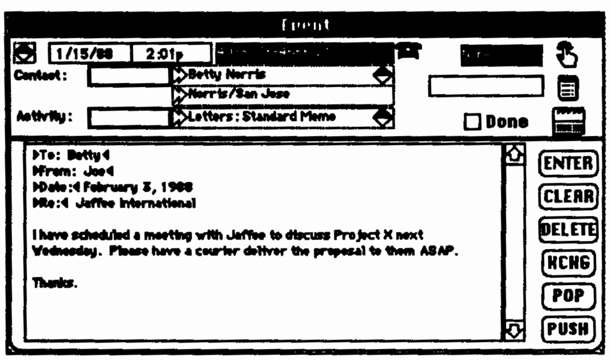
Reference	Hot Key	Description
Today	Option j	Today's date
	Option z	Contact name
ACCT	Option y	Account name
ADDR	Shift Option =	Address lines
C-S-Z	Option 5	City, State Zip
DEAR	Option v	Salutation

Standard Memo

To the right is a sample activity called "Standard Memo" which includes references for the contact name and date.

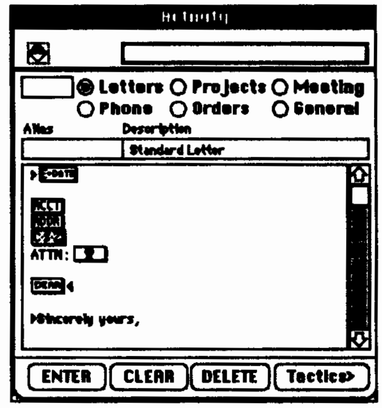


When you create an event using "Standard Memo" as the activity, C.A.T. will insert the heading for the memo in the Note field of the Event window. The references will be replaced with the date currently set on the C.A.T. Calendar and the name of the contact that you select. Then you just enter the body of the memo and click Enter:



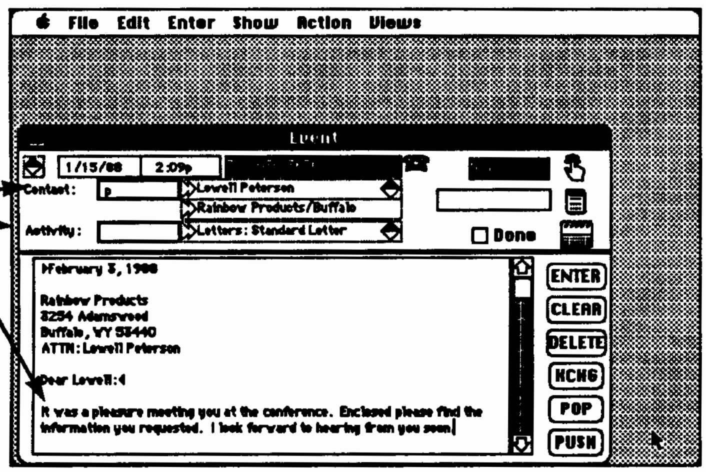
Standard Letter

Similarly, you can set up "Standard Letter" as an activity with an address block, a salutation block, and a closing block:



When you want to send a letter, you will create an event using "Standard Letter" as the activity. C.A.T. will display your preset text blocks in the Note field of the Event window and replace the references with the name and address of the contact you select. You just enter the body of the letter in between the blocks and outside of the markers:

Select the contact.
Select the letter.
Type the letter.

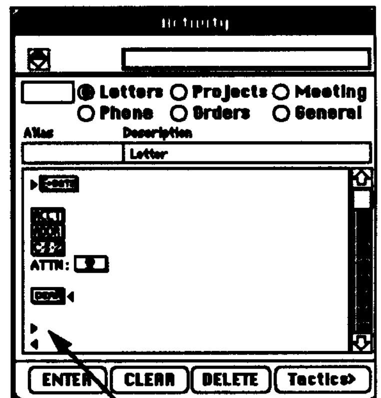


To print the letter, first click the Push button to formally record the event in C.A.T. Then click Pop to redisplay the letter in the Event window.

Next choose the Print command from the File menu. A dialog box will appear. Select the "Letter/memo/note" option and click OK.

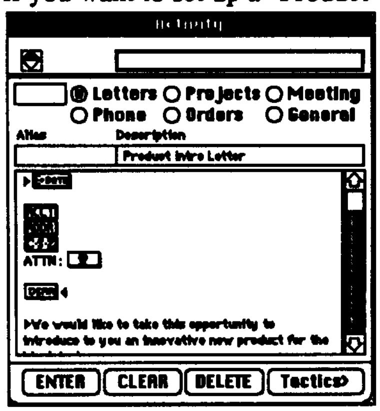
Form Letter

To create form letters, use the New Form Letter command under the Enter menu. This command displays the Activity window with references for a standard letter already entered for you. It includes an address block, salutation block, and closing block:

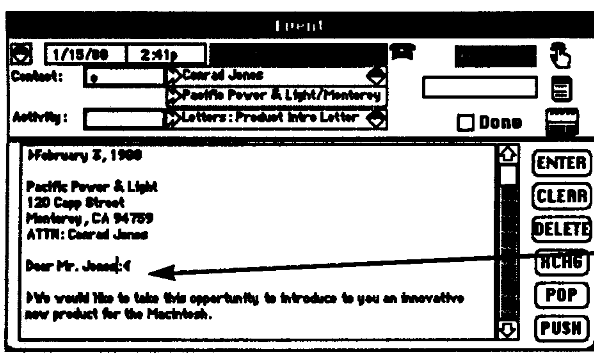


Start your form letter here.

You just enter a description, add preset text, and make changes to references as needed. For example, if you want to set up a "Product Intro Letter" to send to all of your customers, you could enter text following the ◂, and click Enter:



When you are ready to send the letter, you will create an event using "Product Intro Letter" as the activity and the letter will automatically appear in the Note field of the Event window. The references will also automatically plug in each contact's name and address:



Insert any custom paragraphs, here.

Note that even though this is a form letter, you can personalize it for each contact here in the Event window. Just type text between the blocks of preset text, outside of the markers.

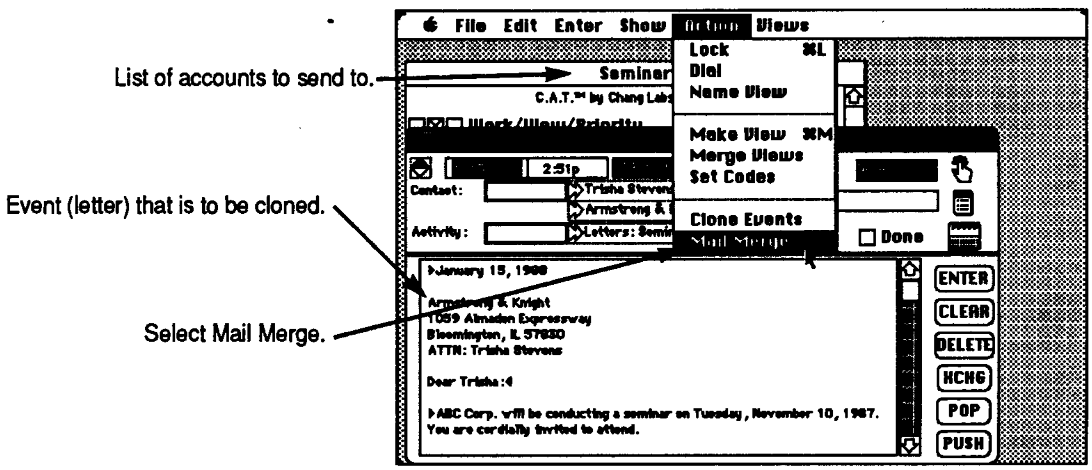
Whenever you need to create a form letter, choose New Form Letter from the Enter menu.

Batch of Letters To prepare a batch of form letters, use the Mail Merge command.

First create a view of the accounts and contacts who should receive the letter. Select the view from the Views menu and it will appear in the Account List window as the current View.

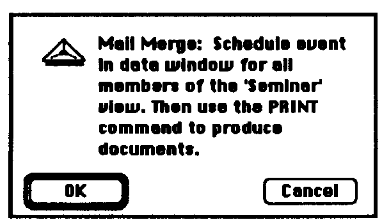
Next create an event using one of the contacts from the view and using the form letter (i.e.,"Seminar Invitation") as the activity. Click the Push button to record the event in C.A.T.

Click Pop to redisplay it in the Event window.



Then choose the Mail Merge command from the Action menu.

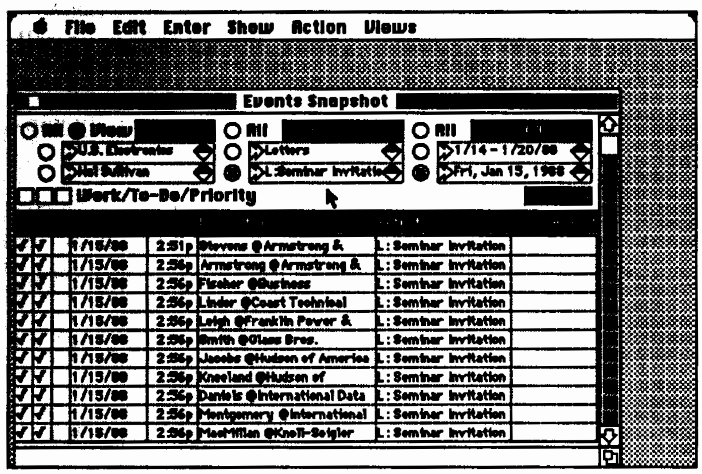
A dialog box will appear for you to confirm the action:



Click OK and C.A.T. will create an event containing the form letter for every contact in the view. A dialog box will appear showing the number of letters (events) created.

Printing Letters

To print the letters, display all of the events just created in the Events Snapshot window. Be sure that the option for the specific activity, in this example, "Seminar Invitation," is selected:



Then choose the Print command from the File menu, select the "All Notes" option, and click Print. The standard Macintosh print dialog box will appear; click as appropriate.

Preset Tactics

Preset tactics allow you to schedule routine preliminary or follow-up activities in advance. For example, you might want to schedule a follow-up call five days after every contact receives a seminar invitation. The letter is the primary activity, and the follow-up call is the tactic activity.

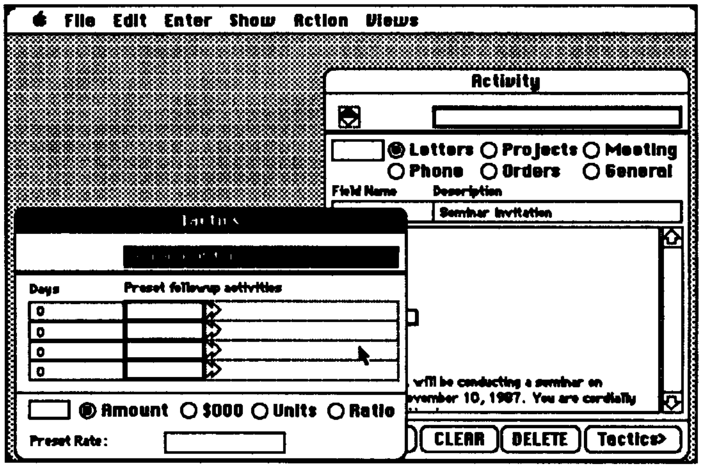
Note that all tactics must be set up as activities in the Activity window, just as primary activities are.

By presetting tactics, every time you create an event using the primary activity, the tactic activity will automatically be scheduled as well. C.A.T. essentially uses the tactic activity to create an event for you.

Preset tactics will help you automate routine activities, plan your strategies on projects, and save data entry time.

Setting Tactics

First enter or display the primary activity in the Activity window. The following example uses the "Seminar Invitation" as the primary activity. Then click the Tactics> button and the Tactics window will appear.

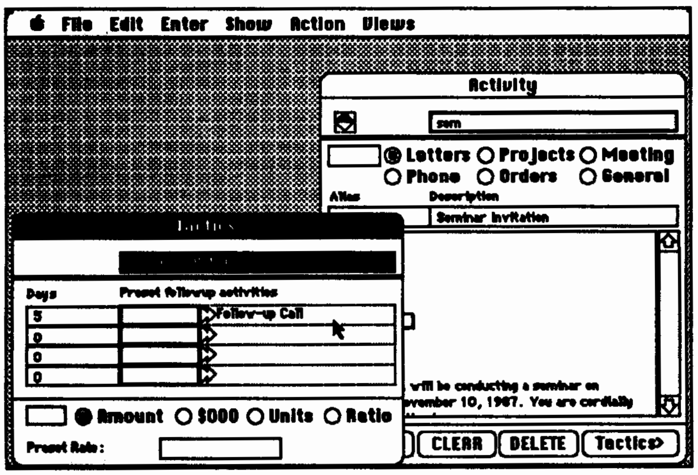


You can preset up to four tactics. For each one, you specify:

- The number of calendar Days separating the primary activity from the tactic. Enter a negative number such as "-2" for tactics to be scheduled before the primary activity; enter a positive number such as "4" for tactics to be scheduled after the primary activity.

- The tactic activities. You can type the activity name or alias in the clairvoyant field, and C.A.T. will display names that match in the echo field (or click once to select an activity from the Activity List window; then reactivate the Tactics window).

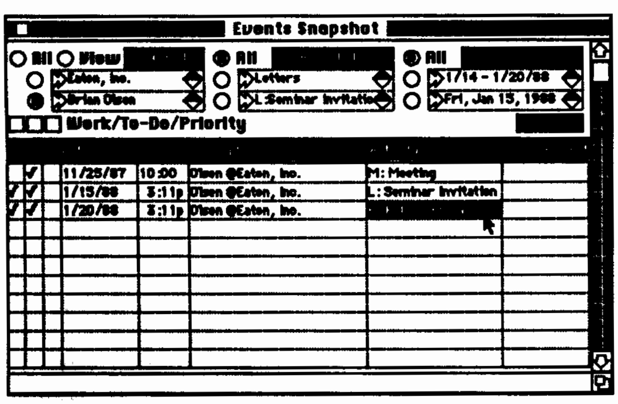
To schedule a follow-up call five days after the "Seminar Invitation" is sent out, you would enter the following:



Then reactivate the Activity window and click Enter.

Using Tactics

Every time you create an event to send an "Seminar Invitation," C.A.T. will automatically create an event for you to make a follow-up call five days later. These events will be displayed in the Events Snapshot window:



Notes on Tactics

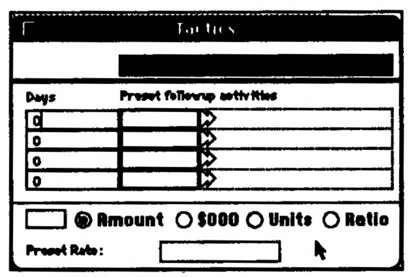
Tactics can only be created when the primary activity is entered in the Event window or when using the Clone Events or Mail Merge commands. If you change the date of a primary activity that has already been entered, C.A.T. does not automatically change the dates of the corresponding tactics.

To manually change a tactic date yourself, first display the tactic in the Events Snapshot window, then double-click on it. The Event window will appear with the record displayed. Make your changes and click Enter.

Preset Rate & Amounts

In the Event window, there is an Amount field that can be used to capture different types of numeric data.

You select the data type in the Tactics window when you create an activity to track amounts. For example, you could set up an activity called "Travel Expenses." When "Travel Expenses" is displayed in the Activity window, click the Tactics> button to display the Tactics window:



There are four options in the lower half of the Tactics window which indicate how amounts entered in the Event window should be formatted on reports.

Select:

Amount	**to indicate dollars and cents**
$000	**to indicate thousands of dollars**
Units	**to indicate a quantity; a rate per unit can be entered at the bottom of the window in the Preset Rate field.**
Ratio	**to indicate non-dollar amounts including numbers, indices, or ratios.**

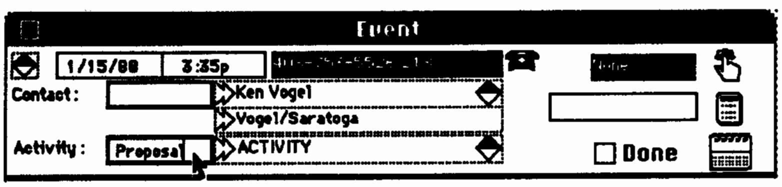
After you make your selection, activate the Activity window and click Enter.

C.A.T. can be used to track time and will print time cards separating billable and nonbillable hours. For billable activities, be sure to select the Units option and enter an optional rate for this activity. (To learn how to use C.A.T.to compute elapsed time, see "Managing Time and Events" in this chapter.)

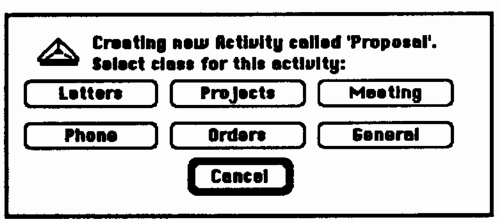
Auto Create Activities

Setting up activities in advance is necessary if you want to use pre-set text and tactics. However, you can also enter activity records "spontaneously" in the Event window. To set this feature, choose the Preferences command from the Edit menu, select the "Automatically create ... activities" option and click OK.

Once this option is set, you can type new activities directly in the Event window as you create new events. For example, suppose you are talking to a client on the phone who has just made a proposal for new project. You can go directly to the Event window and enter: the contact's name, "Proposal" as the activity, and details in the Note field.



When you click Enter, C.A.T. will discover that "Proposal" is a new activity and display the following dialog box:



Click to select the appropriate class and an activity called "Proposal" will be created for you. In this way, you can enter new activities as you need them while C.A.T. simplifies your data entry and helps you save time.

Managing Projects

The following example illustrates how C.A.T. can help you manage projects.

Suppose you want to invite hundreds of people to a fund-raising dinner. You have already set up account and contact records for them and created a view. For each person, you want to send an invitation and schedule a follow-up call one week later. Further, as each person confirms attendence or declines but promises a donation, you want to record their expected attendence or donations.

Start by creating the appropriate activities:

Activity	Explanation
F/R Invitation	Set up a form letter with preset text inviting participants.
F/R Follow-up	The follow-up call. Preset this as a tactic seven days after the invitation is sent.
F/R Attendees	An activity to record the list of attendees.
F/R Donations	An activity to record the amount of donations.

To create a letter and schedule a follow-up call for every contact in the view, use the Mail Merge command. Then use the Print... command to print the invitations and mailing labels.

Note that if you want to invite additional people after the mail merge, you just create events for each contact using "F/R Invitation" as the activity.

To begin following up, display all follow-up call events in the Events Snapshot window. Double-click on the first one to display the record in the Event window. C.A.T. displays the contact's phone number in the upper right corner of the Event window. Make your follow-up call.

If the contact will attend, click in the activity field and type "F/R Attendees." You can also enter the donation amount in the amount field, and enter other information in the Note field as needed, then click Enter. C.A.T. has linked this contact to the "Attendee" activity and unlinked it from the "Follow-up" activity.

Select the next follow-up call. If the contact declines to attend but agrees to donate, click in the clairvoyant activity field on the Event window, change the activity to "F/R Donations" and enter the amount of the donation in the amount field. When you click Enter, C.A.T. has linked this contact to the "Donations" activity and unlinked it from the "Follow-up" activity.

Alternatively, instead of changing the "Follow-up" record, you could create new events to record attendence and donations. However, changing the activity lets you record the result of your call as well as the fact that you have finished the follow-up for this contact.

You can use the Events Snapshot window to display events and print reports that show:

- follow-up calls that still need to be made,
- expected attendees,
- labels for each attendee, and
- expected donations to collect.

Use the Merge Views command to create a view that includes all attendees. Then print an alphabetized account list.

Further, you can use C.A.T. to develop additional follow-up letters that:

- confirm attendence at the dinner or
- confirm donations from contributors.

C.A.T. makes possible the managing of highly complex projects. C.A.T. ensures that no step, vital or trivial, is overlooked.

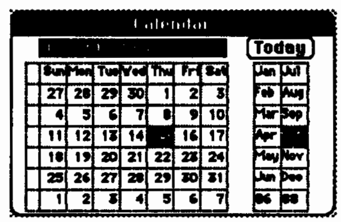
Managing Time and Events

This section includes lots of examples. They show you how you would use C.A.T. commands and records to manage your daily events. You will learn how to:

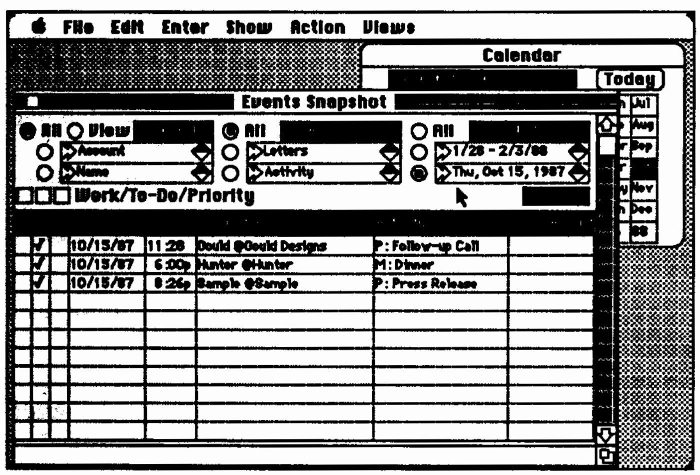
- Use C.A.T. to manage time;
- Record amounts in C.A.T. using the Calc button; and
- Use the Event window to enter daily events.

Time Management

Managing time with C.A.T. is simple and powerful. You use the Calendar window to identify a date range of events. Then you use the Events Snapshot window to see the events within that range.

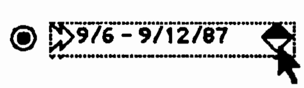


For example, activate the Calendar window; point to the highlighted day; and click. C.A.T. zooms to the Events Snapshot window and shows all events for the day.



Day, Week or Month

You can use the Calendar to identify a specific day, week, or month as the date range. The Events Snapshot window shows all events for the selected time period.



You can scroll through time periods by clicking the Next button in the date range field. For example, if you have selected a weekly time period, each time you click on the Next button, C.A.T. instantly shows the events for the next week.

Work/To-Do/Priority

When the to-do box is checked, you can quickly:

- Scroll backward to see all events from prior weeks that need attention or
- Scroll forward to see all events that are scheduled.

Choosing a List of Events

You can choose the events to see by selecting buttons in the Events Snapshot window and choosing values for each button.

You can select events for:

- All contacts, all contacts in the current view, specific account, or one contact.
- All activities, a class of activity, or one activity.
- All time periods, a range of dates, or one day.
- Work, to-do, or priority items; or any combination of items.

Using a List of Events

You can use the list of events to:

- Find a specific event you need.
- Use the list on-screen to take care of your "to-do" list.
- Manage your time by reviewing all of the events scheduled for a specific week.
- Use the Merge View command to convert event information into views that you can use for other projects.
- Send an electronic report to a spreadsheet or another application.

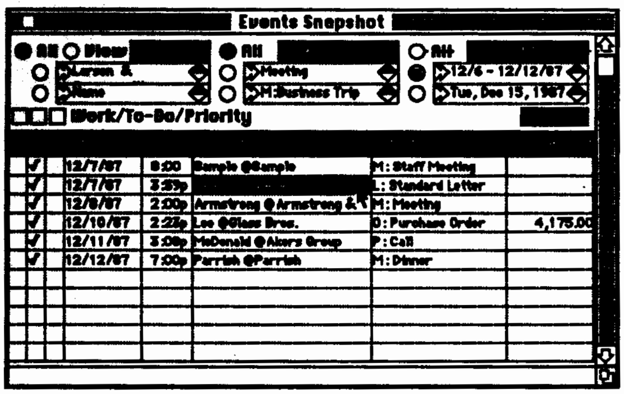
Printing a List of Events

You can also use the events in the Events Snapshot window to produce reports. You can print:

- An audit of an account by selecting one account, all activities, and a specific time;
- Activity reports by selecting all contacts, one activity, and all time;
- All letters, memos, and notes by selecting all contacts, the letter class of activities, and one day; then choosing the "All Notes" option in the Print dialog box;
- A calendar of events by choosing all contacts, all activities, and one time period; and
- Custom event lists by choosing any combination of settings.

Handling To-do Lists

You can use C.A.T. in three ways to manage your to-do lists. In each case, first identify the list of events you want in the Events Snapshot window as shown below:



Checking (√) Event Status

First, you can change the status of each event by pointing to the three status columns on the left and clicking to check or uncheck events. The columns have the following meaning:

W	Work	Events that are checked have been changed during the current session. The "current session" is the time spent since you last saved to disk.
T	To-do	Events that are checked mean that the item needs attention. To tell C.A.T. that the item is done, click on the check mark (√) to remove it (like crossing out an item on a paper to-do list).
P	Priority	Checked events have higher priority than other events. You click to checkmark the items (like highlighting important items on a paper to-do list).

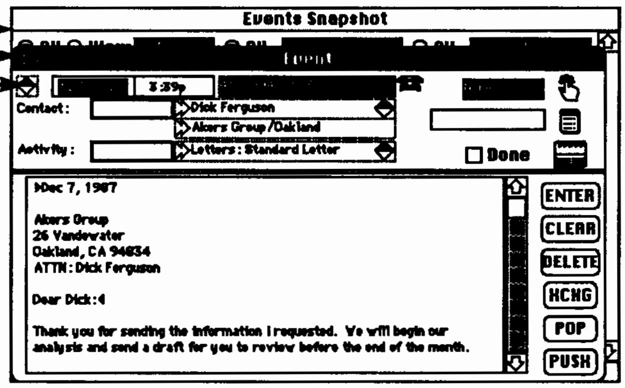
Note that on a color monitor, to-do, and priority items are displayed in color.

By checking and unchecking events, you can update your to-do list.

Changing Each Event

Second, you can handle each item in the Events window. Click to highlight the first event on the Events Snapshot window. Click again on the highlighted record. C.A.T. zooms to the Event window to show the first event.

The list of to-do events.
The first event.
Click on Next button to see next to do event.



You can handle the event by:

- Calling the contact (the phone number is in the center of the window);
- Jotting down comments in the notes area;
- Changing the date, time, or even the activity link information;
- Clicking the Done box; or
- Simply ignoring the event and going to the next event.

If you make any changes, click Enter to record them. If you change the date or time, C.A.T. will automatically update the sequencing on the Events Snapshot window.

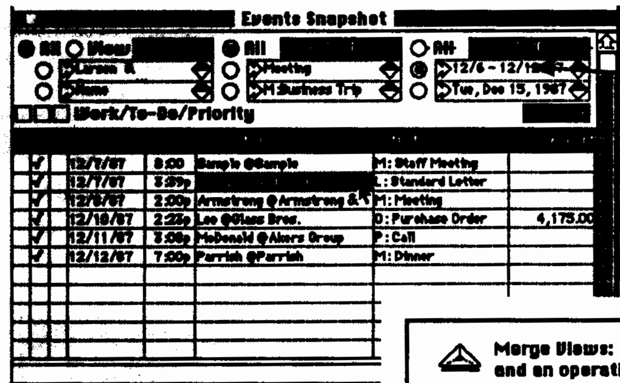
To proceed with the next event on your to-do list, click the Next button in the upper left of the Event window. With a few clicks, you can deal with long to-do lists in an orderly fashion.

Reviewing Account History for Each Event

Finally, you can use Merge View to convert your to-do list into an alphabetical list of accounts; then use the Events Snapshot window to display the history of each account prior to handling the outstanding to-do item. You need this power feature when your contact list becomes very long and you cannot recall the context of the specific to-do item.

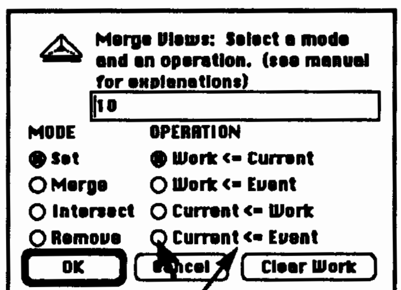
Let's go through this procedure step by step.

First, create your to-do list in the Events Snapshot window:



To-do list for a week.

Next, choose an unused view from the Views menu and then select Merge View from the Action menu:

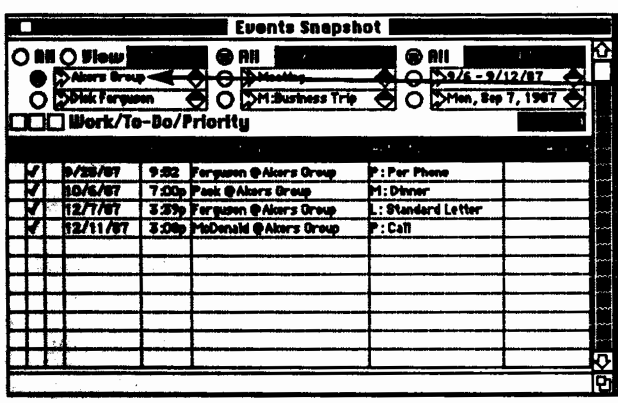


Enter a title for the new view, such as "To Do This Week"; click to select the Current<= Event operation; and click OK.

Means convert the events on Events Snapshot into view with an alphabetical list of accounts.

C.A.T. creates a view containing an alphabetical list of accounts associated with your to-do list and displays it in the Account List window.

Activate the Events Snapshot window; set the buttons to show one account, all activities, and all time; and uncheck all status boxes.



Call report for each account in to-do list. Click Next button to review next account's history prior to handling to do event.

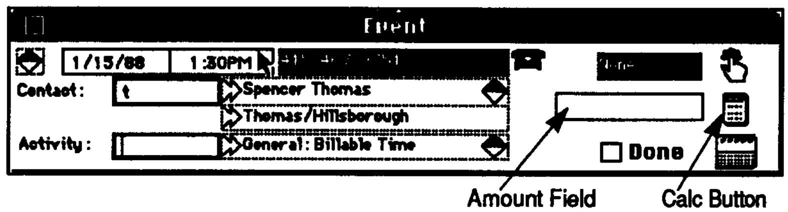
C.A.T. shows all events for each account starting with the first account on your to-do list. Using the event information displayed, you can refresh your memory, account by account.

To proceed to the next account, click the Next button in the account field of Events Snapshot.

You can now manage even the longest list of contacts and recall the context for each event.

Amount Field

The Event window can be used to record amounts in either the Amount field or the Note field. A single amount can be entered directly in the Amount field. Use the Note field to enter multiple formulas, and calculate the total using the Calc button.



Tracking Numbers

For example, you could use the amount field to track key statistics for different companies or divisions. Start by creating an activity class called "Stats" and set up activities for key indicators such as "Revenues" and "Profits." Then create events by entering:

- Any contact at the company or division as the contact;
- "Revenues" or "Profits" as the activity;
- The key number in the amount field;
- Additional details in the Note field as needed;
- And then click Enter.

To review key statistics, display the "Stats" class of events in the Events Snapshot window and use various combinations of the contact, activity, and time options to list the events you need. The amount shows in the last column of Events Snapshot.

Calc Button

By using the the Calc button in conjunction with the Note field, C.A.T. helps you compute totals for a variety of events including expense reports, orders, and quotations. The Calc button searches for amounts in the Note field; and computes and displays the total in the Amount field.

The Calc button can also be used to compute elapsed time if you need to keep track of billable and nonbillable time.

Examples of these uses are given below.

Calculating Expenses

To calculate and track travel expenses, you could set up an activity called "Travel Expenses." Then create an event by entering:

- The Date of the expense record;
- Your own name as the contact;
- "Travel Expenses" as the activity.

In the Note field, enter the expenses incurred:

3/4 RT Airfare $311.84
3/4 Car rental $39
3/4 Parking $3.50
3/4 Hotel $100
3/5 Breakfast $5
3/5 Lunch with client $25
3/5 Mileage 45@$.25

Notice that every amount must be on a separate line and must include a "$" sign. Amounts without dollar signs will be ignored.

You can also enter negative numbers such as **-$350** to record cash advances.

Then click the Calc button:

C.A.T. will search through the Note field for all amounts that include a "$" sign, then compute and display the total in the amount field. This total will also appear in the right-most column of the Events Snapshot window and print on event lists.

To print the expense report, choose Print from the File menu, select the "Letter/memo/note" option and click Print.

If you want to print a list of expense reports that you have accumulated over a period of time, display all of the Travel Expense events in the Events Snapshot window and print a custom event list. (See chapter 4 for more information on designing printed event lists.)

To add expense items to an existing expense record:

- Display the record in the Events Snapshot window.
- Double-click on it to zoom to the Event window.
- Add the items and amounts to the Note field.
- Click Calc to compute the total.
- Click Push or Enter to record the changes.

Using Formulas

In addition to simple amounts, you can also enter formulas in the Note field of the Event window.

A formula may contain one of the following math functions:

+	**for addition**
-	**for subtraction**
*	**for multiplication**
/	**for division**
@	**for quantities**

Each formula:

- Must contain at least one $ (dollar sign) character
- May not have any spaces in it (spaces identify the beginning and end of a formula)
- May contain only one math function (with the exception of the @ operator).

The following are examples of valid formulas:

Formula	Description
55@$2.50	Quantity/Unit cost: 55 units at $2.50 each
200*$0.14	Mileage calculation: 200 miles at $.22 per mile
-2.3*$14	Negative numbers: -2.3 times $14
$17+$14	Simple sum: $17 plus $14
$39.95/3	Division: 1/3 of $39.95
$14-$12	Net difference: $14 minus $12

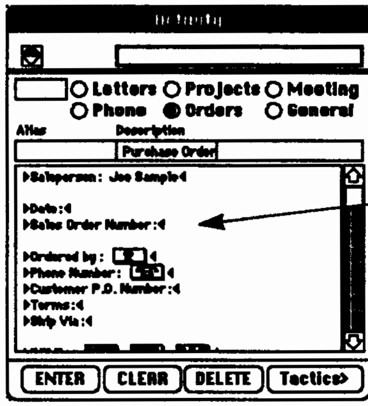
In addition, formulas may contain the % operator. Depending on which math function you use, the % operator does the following:

Operator	Example	Description
+	$200+25%	Mark up the amount $200 by 25%
	23@$12+5%	23 units at $12 marked up 5%
-	$14.95-45%	Discount $14.95 by 45%
	14@$19-10%	14 units at $19 each less 10%
*	60%*$199.95	Compute 60% of $199.95
	23@$22*75%	23 units at 75% of $22

Orders and Quotations

You can use formulas to compute "customer orders," "purchase orders," and "quotations." First, set up activities for each item. Then create events to record each order or quotation.

For each event, enter the buyer's or vendor's name as the contact; an order, purchase order, or quotation as the activity; and set the date. Then enter formulas in the Note field as shown below:



An activity with preset text and references that is used for tracking purchase orders.

Sales Order Number:
#123-32900
Ship Via: UPS Blue

Item 1: 14@$499.95-45%
Item 2: 3@$649.50-45%
Item 3: 3@$649.50-50%
Bonus Item: Free.

Remember that each amount must be on a separate line and must contain a "$" sign. Click the Calc button. C.A.T. will automatically compute and display the total in the amount field. Then click Push or Enter to record the event.

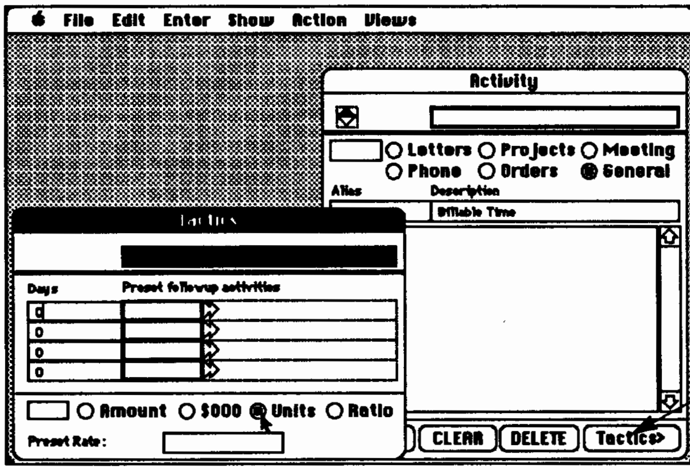
To print the order, choose Print from the File menu and select the "Letter/ Memo/ Note" option.

To print a list of orders or quotes, display the appropriate set of event records in the Events Snapshot window and print a "Custom Event List" (See chapter 4, "Printing Reports," for more on setting up printed Event Lists).

You can also set up activities with preset text (see "Managing Activities" for information on setting up forms) to:

- Set up quotations using a letter format with standard opening and closing paragraphs;
- Create customer order and purchase order forms with built-in prompts such as "Order Number," "Ship Via," or any other information you need; or
- Design custom forms for tracking information as needed.

Computing Elapsed Time To compute elapsed time, first set up an activity called "Billable Time." In the Tactics window, select "Units" as the data type. Enter the Preset Rate for this activity, as well.

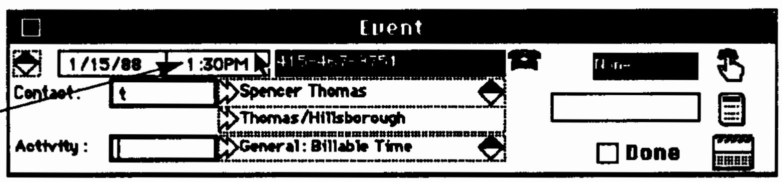


Click here to show Tactics.

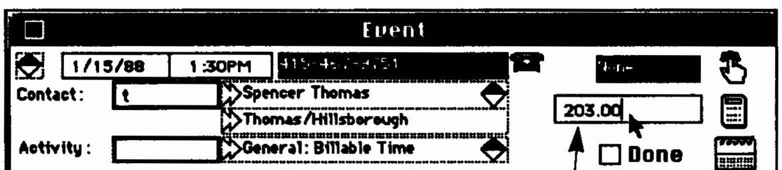
On printed event lists, C.A.T. will show hour, rate, and amount columns and compute total amounts (See chapter 4, "Printing Reports," for details on designing reports).

When you create an event using "Billable Time" as the activity, Calc will assume that the Time field in the Event window contains the starting time of the event:

Event starting time.



When you finish working, click Calc button. The elapsed time of the event will be computed and displayed in the amount field:



Elapsed time.

If you need to use C.A.T. while time is being computed, you can click Push to set the event record aside. When you complete your task, click Pop to redisplay the record in the Event window, then click the Calc button to see the total elapsed time.

You can use this feature for project management or to track billable time. Each time you click Calc, the new elapsed time will be computed.

Accounting Data

C.A.T. is not an accounting system. It is a personal information system that can be used to record and simplify your accounting-related activities. For example, you can use C.A.T. to:

- Track billable time (printing or electronically sending your time card to your accounting department for billing);
- Take sales orders (printing or electronically sending your own order forms);
- Track travel expenses (printing an expense report to submit for reimbursement).

C.A.T. is designed to track the information you need.

Daily Events

C.A.T. can be used to manage a variety of daily events, ideas, and information. The following are just a few examples.

Phone Messages

Phone-message pads are commonly used to jot down notes as you talk on the phone. Often, a conversation will require follow up or include facts that you would like to record for future reference.

At the end of a day, review your phone messages and select relevant messages for inclusion in C.A.T. For each message, create an event using:

- The name of the caller as the contact;
- "Phone Call" as the activity; and
- Enter the information you wish to remember in the Note field.

In particular, sensitive issues that involve contracts or delicate negotiations may require the accurate logging of conversations. For these situations, you may wish to create specific activity fields that help you categorize the events associated with the subject matter.

Meetings

To schedule a meeting, create an event by entering:

- The date and time of the meeting;
- The name of the person you will be meeting, as the contact;
- "Meeting" as the activity; and
- Other information (i.e., agenda, participants) in the Note field.

Recurring Meetings

C.A.T. can also be used to schedule recurring meetings. For example, if a committee meets every Wednesday, create an event by entering:

- The date and time of the next meeting;
- Yourself or the committee chairman as the contact;
- "Committee Meeting" as the activity; and
- Enter other information as needed in the Note field.

Then click the Recur button in the Event window and a dialog box will appear. Click to select the frequency of the meeting and it will appear in the field just above the Recur button.

C.A.T. will show the event on the Events Snapshot window every Wednesday until you change the information.

Miscellaneous To-do Items

To set up a list of miscellaneous things to do, create an event by entering:

- The date on which the items need to be acted on;
- Yourself as the contact;
- "To-do List" as the activity; and
- Enter the action items in the Note field.

Tracking Ideas

As you work and talk with people, ideas come up that may be useful for other projects. Too often, the ideas are forgotten before you can do anything about them. Create an event by entering:

- Yourself or the source of the idea as the contact;
- The appropriate subject (i.e., marketing strategy) as the activity; and
- The idea in the Note field.

C.A.T. can manage lots of ideas without slowing you down. Create as many events as you need and enter notes in sufficient detail so that the idea is fully described.

When you need the information, use the Events Snapshot window to find related ideas, examine them, and print reports to help you get the new project off to a flying start.

Text From Other Products

C.A.T. can be used to track text from other software. For example, you can copy spreadsheet cell values into C.A.T. and store them in the Notes field of an event. Similarly, you can store messages from electronic mail systems in the Notes field of events, rather than creating a separate document on disk for each message.

In these cases, you use the Copy and Paste commands available in most applications to copy text information and paste it into the Notes field of an event record.

C.A.T. sorts all events by contact, activity, and time; so that you can find your data -- easily.

Final Note:
"Power Marketing With the Personal Touch"

C.A.T. can be used to produce form letters and mass mailings. Unfortunately, form letters are often associated with the negative image of "junk mail." Using C.A.T., you can elevate your efforts to develop relationships with people.

The relationships that you build with people and their perception of you affect your ability to achieve the goals in your life.

C.A.T. enables you to produce notes, hundreds per week, that let your contacts know that you are thinking of them. As you read, think, and talk with other people, you can produce short letters that tell people you understand their needs. For example, when you read a news story that may be of interest to one of your contacts, you can make a copy of it and prepare a short letter in C.A.T.

To simplify writing letters, you could set up an activity called "Standard Letter" that includes references and preset text. Whenever you want to send a letter, enter a new event in the Event window with the following information: the name of the contact and "Standard Letter" as the activity.

The letter will appear in the Note field with the contact's name and address automatically filled in. You only need to type in your note and click Enter. Even if you use form letters with preset messages, you can still add that personal touch by inserting an extra sentence, a "P.S.," or other greeting.

C.A.T. allows you to print documents as you create them. Or you can print all of your correspondence at one time at the end of each day as follows: Using the Events Snapshot window, display the events you wish to print by selecting the current date, and the appropriate contacts and activities. Then choose Print and select the "All Notes" option to print all letters, memos, and notes. It will only take a few minutes everyday to sign and mail all letters.

With some diligence, you can send hundreds of notes per week that help you keep in touch with key contacts in your industry in a personal way. That's power marketing!

Printing Reports

Printing Reports

C.A.T. provides reports to help you manage information. This chapter is a reference for printing procedures, report options, and report examples.

Some reports have built-in formats; others you design yourself. Built-in reports include:

- Dossiers and Calendars;
- Letters, Memos, and Notes;
- Mailing Labels; and
- Activity List and Lookup Tables.

Custom reports include:

- An account list generator that lets you sort, group, and select the contacts to be included in, for example, a phone directory.
- An event list generator that prints various reports of your own design, such as call reports or a subscriber list.

For each report generator, you can design up to four reports for regular use as part of the standard print menu.

Company Logo

To print your company name and address at the top of reports, choose Options from the Enter menu. You can also include a logo if you wish. (See "Creating Your Own Logo" in appendix C.)

Print Dialogs

C.A.T. uses the standard Macintosh dialog boxes. These boxes display and control printer options for the ImageWriter or LaserWriter. Different versions of the Macintosh print dialog box will show different options. If you have any questions about printer options, check your printer manual for help. Note: Non-Apple printers have not been tested for compatibility.

Before starting to print any report, note the following standard Macintosh printing conventions.

- Use the Chooser desk accessory from the menu to designate the printer you will be using. The Chooser lets you connect several printers to your Macintosh through the AppleTalk network. Each printer may be preloaded with different kinds of paper.

For example, one printer could be set up with address labels; and a second printer could be set up with your company letterhead.

- Use Page Setup from the File menu to set various page options. For example, you can change paper sizes, print orientation, etc.

Consult your Apple manuals for detail.

ImageWriter

If you are using an ImageWriter, note the following:

- To set the true "top of form" for printing, align your paper, then turn the printer off and on again.
- Make sure you have enough space on your disk for the spool file. Typically, you will need 30K or more bytes of free space.
- Note that C.A.T. does not support the Draft mode for printing letters, notes on reports, borders on reports, or mailing labels.

LaserWriter

For fastest results when printing with the LaserWriter, choose fonts that are preloaded on the LaserWriter. The minimum LaserWriter preloaded font selection includes Times, Courier, and Helvetica. The C.A.T. default font, Chicago, is designed for use with the ImageWriter and is not available as a preloaded font on the LaserWriter. Consult your printer manual for more details. Using only preloaded fonts can reduce report printing time by 50%.

Canceling Print

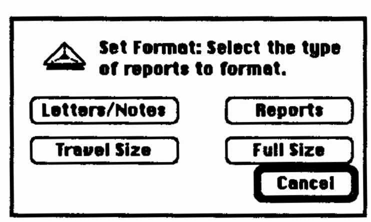
During a print job, you can cancel printing by clicking the Cancel button or pressing the Command and . (period) keys together. While printing mailing labels, canceling may require several clicks on the Cancel button.

Fonts, Sizes & Styles

You can design your reports so that you can print different segments of your report and letters in different fonts, sizes, and styles. For example, you can have your company name italicized, the address smaller, and different styles for the subtitle, body, and subtotal sections of your reports.

C.A.T. is not a full-featured word processor: You do not have font and size control over each word in a letter.

You use the "Set Format" command to control font, size, and style selection. When you choose Set Format from the File menu, the following dialog box appears:



C.A.T. lets you set up four types of formats.

They are used as follows:

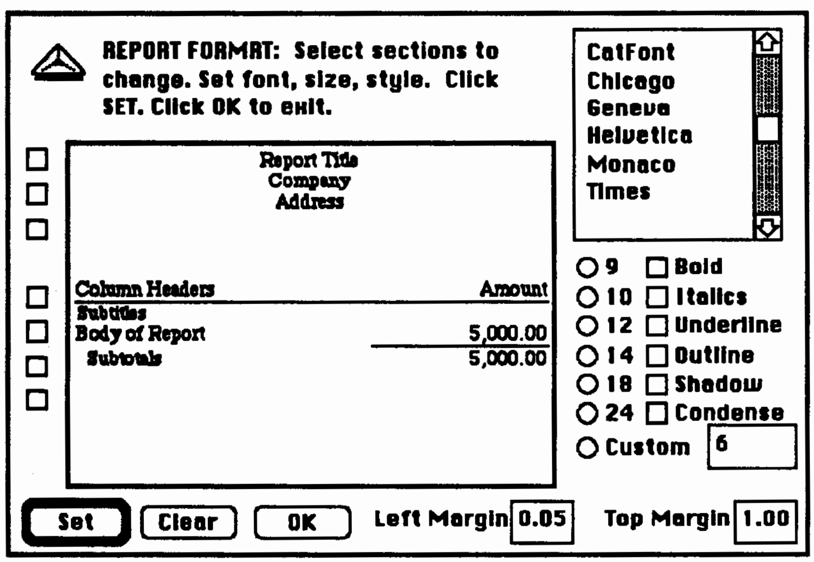
Letters/Notes
- Letter/memo/note
- All Notes

Reports
- All Account Lists
- All Event Lists
- Activity List
- Lookup Tables

Travel Size
- Travel-size Dossiers
- Travel-size Calendars
- Mailing Labels
- Lookup Tables

Full Size
- Dossiers
- Calendars

Choose a button and C.A.T. presents the following dialog:



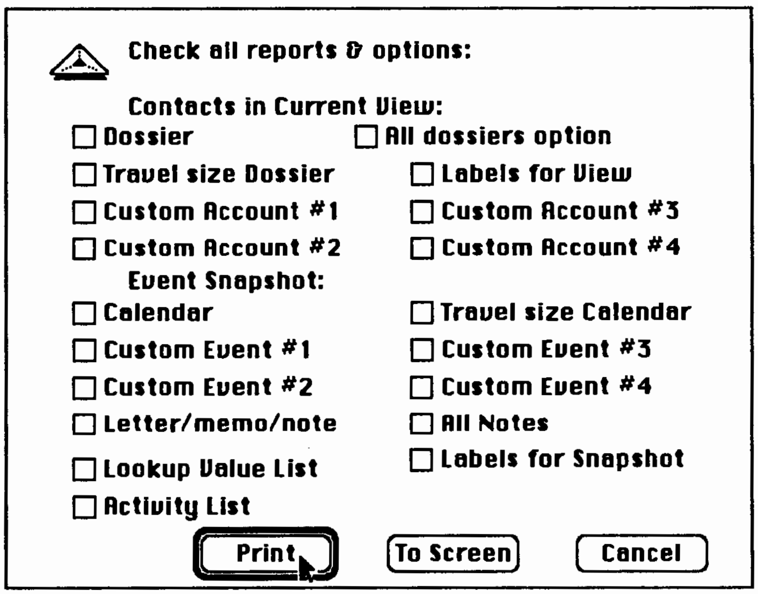
The box presents a typical report divided into seven major sections. On the left are seven check boxes -- one for each section. Check one or more sections; select the font, size, and style; then click Set. When the sample report suits your preferences, click OK.

For each report, the sections are used as follows:

Report Type	Letter	Report	Dossier	Calendar	Label
Report Title	N/A	Yes	Yes	Yes	N/A
Company	Yes	Yes	Yes	N/A	Yes
Address	Yes	Yes	Yes	N/A	Yes
Column Header	N/A	Yes	Yes	Yes	N/A
Subtitles	N/A	Yes	Yes	Yes	N/A
Body of Report	Yes	Yes	Yes	Yes	Yes
Subtotals	N/A	Yes	N/A	N/A	N/A

Print Command

To select reports to print, choose Print from the File menu. The following dialog box will appear:



Just click to select the reports you want to print, and uncheck items that you do not want to print.

The reports in the upper half of the dialog box are affected by the view displayed in the Account List window. If the window shows:

- All accounts, then the reports you select will include information for all of the accounts in your database.
- The Current View, then information will be printed for the accounts and contacts in that view only.
- The Work view, then information will be included for checked accounts and contacts only.

The reports in the lower half of the dialog box are affected by the view of events displayed in the Events Snapshot window. For example, you can print a calendar for a specific day. Other reports will include information for the contacts and activities selected.

The "Lookup Code" and "Activity List" reports are for your reference.

At the bottom of the dialog box are three buttons. After you make your selections, click:

- **Print** to start the printing sequence and send reports to a selected printer.
- **To Screen** to send each selected report to the screen so that you can check the page layout prior to printing.
- The **Cancel** button to cancel the Print command without printing.

Trouble-shooting

If you attempt to print and nothing happens, check the following:

- Make sure the printer is on and ready to receive reports.
- Check the cable between the Macintosh and the printer to make sure it is fastened securely.
- Exit C.A.T. and use the Chooser command (under the menu). Then test the printer from the Finder by choosing Print Catalog from the File menu. Note that Print Catalog is not a C.A.T. command. If nothing prints, you have a printer incompatibility problem. Consult your local dealer.
- Once a year, check the batteries in your Macintosh. Weak batteries could cause problems relating to printing.

If the printer shows garbage, make sure you are using an Apple certified cable. Also, make sure you have the right cable for your make and model of printer. The wrong cable prints garbage.

Dossier

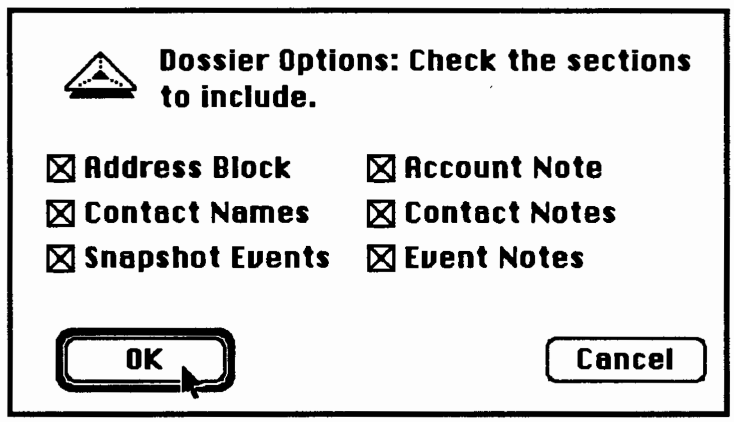
A dossier is a history of an account. It can include account, contact, and event information with notes (if any) for each.

Event Options

You control the event records to be included by setting the activity and time options in the Events Snapshot window. Information will be printed for all of the events currently displayed in the Events Snapshot window.

Report Options

To choose what sections of the dossier to print, choose Dossier Options from the Edit menu. The following dialog box will appear:



You click to check or uncheck items. Make your selections and click OK.

Size Options

To print dossiers in full size (8-1/2"X11") with account, contact, and event information on one page and notes on a second page, select the "Dossier" option in the Print dialog box.

To print a travel-size dossier (7"X7") with all information on one page that can be trimmed to fit in typical pocket calendars, select the 'Travel Size" option in the Print dialog box.

To print the travel format using the full length of the page (i.e., 7"X 11"), set Preferences from the Edit menu.

Format Options

To change the fonts, sizes, and styles for a dossier, use Set Format from the File menu. Select the Full Size option to format full-size dossiers; select Travel Size to format travel-size dossiers.

To produce page sizes that suit other travel-size notebooks such as Junior Page, European format, or other needs, use Page Setup from the File menu.

Printing Dossiers

If you want to print a dossier for one specific account:

- First click to highlight the account in the Account List window.
- Select your options, then choose Print from the File menu.
- In the print dialog, select "Dossier" or "Travel Size Dossier."
- Then click Print.

If you want to print dossiers for all of the accounts in a view:

- First display a view in the Account List window.
- Select your options, then choose Print from the File menu.
- In the dialog box, select "Dossier" or "Travel Size Dossier."
- Select the "All Dossiers" option also.
- Then click Print.

If the printing of all dossiers is interrupted and you want to resume from a specific account, select the "Start with current..." option from Preferences under the Edit menu. Then activate the Account List window, highlight the account to resume printing with, and choose Print.

Full Size Dossier:

DOSSIER

Glass Bros.	415-982-1000
1 Market Plaza	
Richmond, VA 78303	

NAME	TITLE	PHONE
Nelson Lee	CEO	415-982-1234
Carl Mann	Nat'l Account Mgr.	415-982-4321
Jackie Smith	Specialist	415-982-1432

#	DATE	TIME	R	NAME	ACTIVITY	AMOUNT
1	9/23/87	3:16p		Lee	P:Call	
2	9/28/87	11:34		Smith	L:Seminar Invitation	
3	10/5/87	11:34		Smith	P:Follow-up Call	
4	10/29/87	12:37		Mann	P:Call	
5	11/11/87	12:24		Smith	L:Standard Letter	
6	12/10/87	2:23p		Lee	O:Purchase Order	4,175.00

Full Size Dossier Notes:

NOTES:

5:

Enclosed please find the materials you requested for your presentation on November 20th. If you have any questions, feel free to call me any time.

6:

12/10/87
15189

324
Net 30
UPS

Same As Above

15	Widgets	275.00	4,125.00
		50.00	
			4,175.00

Travel Size Dossier:

NOTES:

5:

Enclosed please find the materials you requested for your presentation on November 20th. If you have any questions, feel free to call me any time.

6:

12/10/87
15189

324
Net 30
UPS

Same As Above

15	Widgets	275.00	4,125.00
		50.00	
			4,175.00

DOSSIER

Glass Bros.	415-982-1000
1 Market Plaza	
Richmond, VA 78303	

NAME	TITLE	PHONE
Nelson Lee	CEO	415-982-1234
Carl Mann	Nat'l Account	415-982-4321
Jackie Smith	Specialist	415-982-1432

#	DAY	NAME	ACTIVITY	AMT
1	9/23/8	Lee	P:Call	
2	9/28/8	Smith	L:Seminar Invitation	
3	10/5/8	Smith	P:Follow-up Call	
4	10/29/	Mann	P:Call	
5	11/11/	Smith	L:Standard Letter	
6	12/10/	Lee	O:Purchase Order	4,175.00

Mailing Labels

You can choose to print labels for the contacts currently displayed in the Account List window or for the people associated with events currently displayed in the Events Snapshot window. Each label can include the following lines of information:

- Contact's first name, last name, and mail stop (if any),
- Title of contact,
- Account name,
- Street address (could be multiple lines), and
- City, state, zip and country

Label Options

Choose Label Options from the Edit menu and the following dialog box will appear:

You can click to check or uncheck items. Make your selections and click OK. Note that a mail stop (if any) will print on the same line as the contact name and a country code will print on the same line as the city, state, and zip code. If the contact does not have a title or country, C.A.T. will automatically skip the line on the label.

You can use this label utility to print name tags for seminar participants or cocktail parties. Check only name, title, and account; and make the fonts bigger so that they fit your labels.

Country Options

If you have international contacts, set Preferences under the Edit menu to tell C.A.T. that lookup table 1 contains country codes.

Format Options

Labels can be printed using different fonts, sizes, and styles. The "Travel Size" option under Set Format controls mailing label fonts.

Page Setup

To print labels, C.A.T. supports the ImageWriter only. In order to print labels correctly, choose the Page Setup command from the File menu and select the "No Gaps Between Breaks" option. After printing labels, remember to uncheck the option in order to print reports correctly.

Labels for a View To print one label for each contact in the current view:

- Display a view in the Account List window.
- Choose Page Setup from the File menu and select the "No Gaps Between Breaks" option.
- Select your other options, then choose Print from the File menu.
- Select the "Labels for View"' option.
- Click Print.

(On the ImageWriter, note that C.A.T. does not support printing labels in the Draft mode.)

Labels will print in alphabetical order by account and contact name. If certain labels fail to print, make sure that you have selected contacts within the account for the view. A contact selected for the view has a check mark beside his/her name in the Contact List window.

If printing is interrupted and you wish to resume from a specific account, select the "Start with current..." option from Preferences under the Edit menu. Then activate the Account List window, highlight the account with which you want to resume printing, and choose Print again.

Labels for Snapshot To print one label for each person connected with the event in the Events Snapshot window:

- Make your selections in the Events Snapshot window.
- Choose Page Setup from the File menu and select the "No Gaps Between Breaks" option.
- Select your options, then choose Print from the File menu.
- Select the "Labels for Snapshot" option.
- Click Print.

Labels will print in chronological order by event.

If printing is interrupted and you wish to resume from a specific event, select the "Start with current..." option from Preferences under the Edit menu. Then activate Events Snapshot, highlight the event to resume printing with, and choose Print again.

Sample Label:

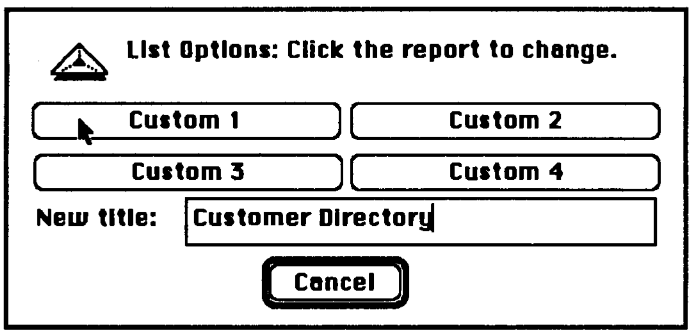
Account Lists

Account Lists are reports you design to print account and contact information. For example, you could print a customer directory.

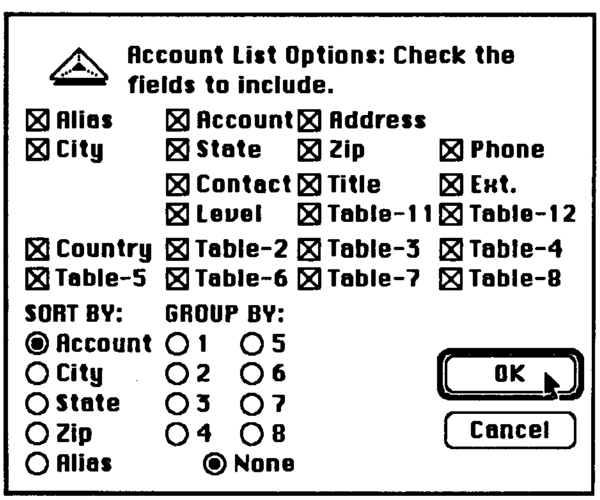
Report Options

Each report prints using the view currently displayed in the Account List window. Accounts within the view may be grouped using one of the eight lookup tables for the account record. Accounts can also be sorted alphabetically by name, city, state, zip code or alias. If no other option is selected, by default, accounts are sorted by name.

To design a report, choose Account List Options from the Edit menu. The following dialog box will appear:



- If you are creating a new report, enter the report title, then click one of the four buttons. The report name will replace the button name in the dialog box shown above, appear in the Print dialog box, and become the report title.
- If you are changing an existing report, click one of the four buttons.



In the upper part of the dialog box, you see the columns that can be included in this report. C.A.T. automatically controls the width of each column. For example, if you want to include a lookup table as a column, C.A.T. determines the width of the column based on the width of the entries in that table.

Sorting

On the bottom left is a set of buttons for controlling sorting. For example, if you select "State," C.A.T. will list your accounts by state.

To the right is a set of buttons numbered 1 through 8 for grouping accounts by lookup table. Each table value will be printed as a centered subtitle. Select None if you do not wish to group your accounts at all.

You can click to check or uncheck items. Make your selections and click OK.

Format Options

To control the fonts, sizes, and styles for a report, choose Set Format from the File menu and select the "Report" option.

Viewing on Screen

To preview the overall width of your report, use the To Screen button on the Print dialog box. Use Page Setup to set the actual paper width.

Printing Account List

To print an account list:

- Display a view from the Account List window.
- Select your options, then choose Print from the File menu.
- Select one of the four "Custom Account List" reports.
- Click Print.

Sample Account List:

Feb 13, 1988

ABC Corp.
1526 Grove Street
Cupertino, CA 95643

Customer Directory

ACCOUNT	CITY	PHONE	CONTACT	Title
Abess Group	Oakland	415-994-0183	Dick Ferguson	President
			Harry McDonald	Secretary
			Mildred Pack	Vice President
Antonelli	Cupertino	408-867-9375	Michael Antonelli	Attorney
Armstrong & Knight	Bloomington	714-339-8349	Kirby Armstrong	President
			Ken Roth	Vice President
			Trisha Stevens	Operations Mgr.
Brodie	Campbell	408-534-9686	Bill Brodie	Husband
			Kristin Brodie	Daughter
			Jill Brodie	Sales Manager
Business	Miami	612-338-0700	Gary Fischer	CEO
			Karen Heller	Vice President
			Susan Moffett	Secretary
Christiansen	Santa Clara	408-776-9333	Kathy Christiansen	
Coast Technical	Philadelphia	603-221-1219	Mark Kennedy	President
			Stacey Linder	Marketing
Damian Enterprises	Piedmont	415-822-5321	Tom Palladin	CEO
			Ed Sherman	Vice President
			Aaron Smith	Sales Manager
DeCarlo	Santa Clara	415-696-1981	Lisa DeCarlo	Technical Support
			Fred Lang	Fiance
Eaton, Inc.	San Jose		Russell Kirshner	Vice President
			Brian Olsen	Specialist
			Glenn Topper	President
Fogarty	San Jose	415-267-6634	Alan Fogarty	Secretary
Franklin Power & Light	Boston	213-448-9323	Maureen Collins	Secretary
			Sharon Leigh	Vice President
			Justin Rooney	President
Glass Bros.	Richmond	415-982-1000	Nelson Lee	CEO
			Carl Mann	Nat'l Account
			Jackie Smith	Specialist
Gould Designs	Santa Cruz	408-338-6422	Mike Gould	
Graham	Campbell	408-584-3303	Allison Graham	
Harper Products	San Francisco	415-923-5688	Bill Kirkpatrick	CEO
			Justin Parks	Vice President
			Marlee Thompson	Secretary
Hitchcock	Sacramento	712-441-6755	Bernie Hitchcock	Husband
			Dana Hitchcock	Daughter
			David Hitchcock	Son
			Sylvia Hitchcock	

Calendar

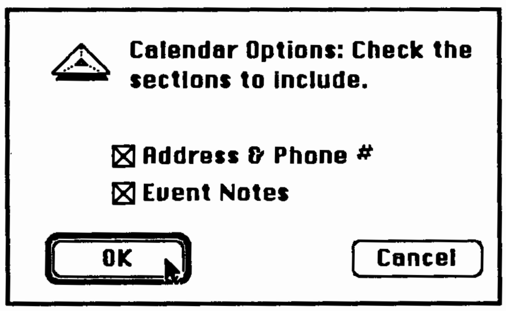
The Calendar report shows your schedule for one day or a range of days.

The events printed on the calendar are determined by the events shown in the Events Snapshot window.

For each day, C.A.T. prints a one-page calendar that shows each event and the associated notes which can be your agenda for a meeting or figures for a sales call. Optionally, you can include the address and phone number for each event so that the calendar can be used as a travel aid.

Calendar Options

To choose what items will be printed on the calendar, choose Calendar Options from the Edit menu. The following dialog box will appear:



Make your selections and click OK.

Size Options

To print calendars in full size (8-1/2"X11") with events, addresses, and phone numbers on one page and notes on a second page, select the "Calendar" option in the Print dialog box.

To print calendars in travel size (defaults to 7"X7") with all information on one page, select the "Travel Size Calendar" option. Each page can be trimmed to fit in typical pocket calendars.

To print the travel format using the full length of the page (i.e., 7"X11") see Preferences under the Edit menu.

Format Options

To change fonts, sizes, and styles for a calendar, use Set Format under the File menu. The "Full Size" button controls the selections for the full-size calendar. The "Travel Size" button controls the selections for the travel-size calendar.

Use options on Page Setup to produce sizes to suit other travel-size notebooks (such as Junior Page or European format) or for other needs.

To print one specific calendar:

- Double-click on a day in the Calendar window.
- Select events in the Events Snapshot window.
- Select your options, then choose Print from the File menu.
- Select the "Calendar" or "Travel Size Calendar" option.
- Click Print.

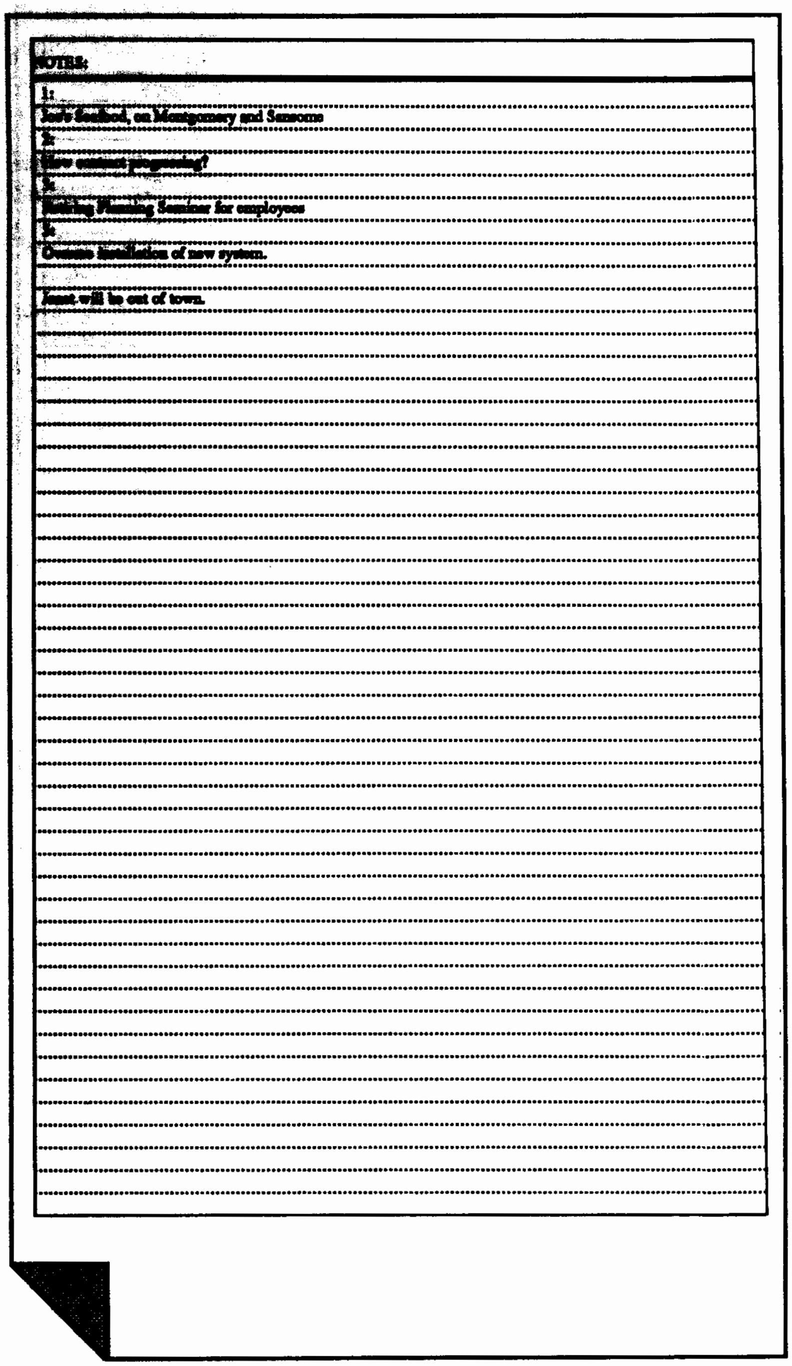
To print a calendar for a range of days:

- Double-click on the Goto arrow for the date range in the Events Snapshot window.
- Set the range and click OK.
- Select events in the Events Snapshot window.
- Select your options, then choose Print from the File menu.
- Select the "Calendar" or "Travel Size Calendar" option.
- Click Print.

Full Size Calendar:

Wed, Nov 18, 1987			
#	*TIME*	*NAME*	*ACTIVITY*
Morning			
1	11:30	Rachel Zimmerman	M:Lunch
		Zimmerman	930 Montgomery St.
		San Francisco	415-771-1069 /
2	11:39	Gary Fischer	P:Follow-up Call
		Business Communications,	378 Arguello Blvd.
		Miami	612-338-0700 /
Afternoon			
3	12:00	Phillip Yamato	P:Seminar
		Yamato	1899 Marietta Drive
		Los Altos	415-241-8550 /211
4	1:00p	Joe Sample	M:Board Meeting
		Sample	435 Corbett Ave.
		Cupertino	408-665-6682 /219
5	6:30p	Hal Sullivan	M:Business Trip
		U.S. Electronics	5221 Central Ave.
		Houston	203-776-1074 /

Full Size Calendar Notes:



NOTES:

1:

Joe's Seafood, on Montgomery and Sansome

2:

How contract progressing?

3:

Retiring Planning Seminar for employees

4:

Oversee installation of new system.

Janet will be out of town.

Travel Size Calendar:

NOTES:
1:
Joe's Seafood, on Montgomery and Sansome
2:
How contract progressing?
3:
Retiring Planning Seminar for employees
5:
Oversee installation of new system.
Janet will be out of town.

Wed, Nov 18, 1987

#	*TIME*	*NAME*	*ACTIVITY*
		Morning	
1	11:30	Zimmerman	M:Lunch
		Zimmerman	930 Montgomery St.
		San	415-771-1069 /
2	11:39	Fischer	P:Follow-up Call
		Business	378 Arguello Blvd.
		Miami	612-338-0700 /
		Afternoon	
3	12:00	Yamato	P:Seminar
		Yamato	1899 Marietta Drive
		Los Altos	415-241-8550 /211
4	1:00p	Sample	M:Board Meeting
		Sample	435 Corbett Ave.
		Cupertino	408-665-6682 /219
5	6:30p	Sullivan	M:Business Trip
		U.S.	5221 Central Ave.
		Houston	203-776-1074 /

Event Lists

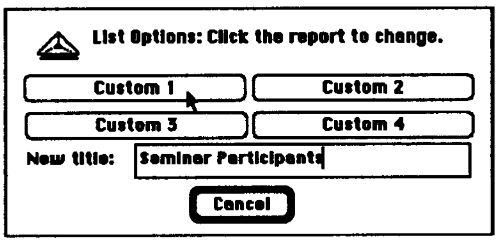
Event Lists are reports of your event records. You can use this report generator to design call schedules, sales reports, travel schedules, seminar lists, portfolio valuations, statistical analyses, or a variety of other reports.

Each report includes the events currently displayed in the Events Snapshot window. Events are always shown in chronological order.

To display events in alphabetical order, use Merge Views and convert the event list into a view. (See "Managing Contacts" in chapter 3 for more details on Merge View.) Then use the Account List generator to print the report you need.

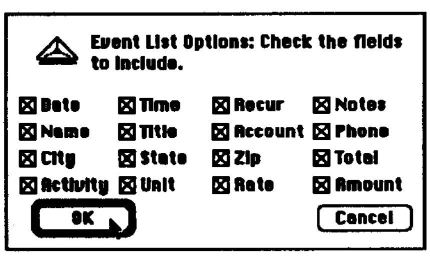
Report Options

To design a report, choose Event Lists from the Edit menu and the following dialog box will appear:



- If you are creating a new report, enter the report title, then click one of the four buttons. The report name will replace the button name in the dialog box shown above, appear in the Print dialog box, and print on the report.
- If you are changing an existing report, click one of the four buttons.

The Event List Options dialog box will appear:



Most of the options are obvious; but some need special attention:

Option	**Description**
Notes	**Prints the notes associated with every event. Notes are printed under the event record.**
Total	**Shows the total of the amount column at the bottom of the report.**
Activity	**Shows the activity name for this event.**
Unit	**If the event's activity is a "Units" type, the amount from the Event record is shown in this column.**
Rate	**If the event's activity is a "Units" type, the preset rate in the Activity field is shown in this column.**
Amount	**If the event's activity is a "Units" type, C.A.T. multiplies the unit column by the rate column and shows the result here. Otherwise, the Amount field from the Event record is printed in this column.**

You can use the unit, rate, and amount columns to produce billable hours, time cards, sales analysis reports, or other reports that require similar computations.

Click to check or uncheck items. Make your selections and click OK.

Format Options

To control the fonts, sizes, and style for a report, choose Set Format from the File menu and select the "Report" option.

To preview the overall width of your report, use the To Screen button on the Print... dialog box. Use Page Setup from the File menu to set the actual paper width.

Printing Event Lists

To print an event list:

- Select events in the Events Snapshot window.
- Select your options, then choose Print... from the File menu.
- Select one of the four "Event List" options.
- Click Print.

Sample Event List:

Feb 13, 1988

ABC Corp.

1526 Grove Street

Cupertino, CA 95643

Seminar Participants

DATE	NAME	TITLE	ACCOUNT	PHONE	CITY
9/28/8	Trisha Stevens	Operations	Armstrong &	714-339-8349	Bloomington
9/28/8	Stacey Linder	Marketing	Coast Technical	603-221-1219	Philadelphia
9/28/8	Sharon Leigh	Vice President	Franklin Power &	213-448-9323	Boston
9/28/8	Jackie Smith	Specialist	Glass Bros.	415-982-1000	Richmond
9/28/8	Dave Jacobs	Nat'l Account	Hudson of America	415-363-1765	Dallas
9/28/8	Katy MacMillan	Nat'l Account	Knoll-Seigler	515-872-0377	Chicago
9/28/8	Mel Brady	President	Tucker Resources	212-684-2922	New York
9/28/8	Hal Sullivan	Vice President	U.S. Electronics	203-776-1074	Houston

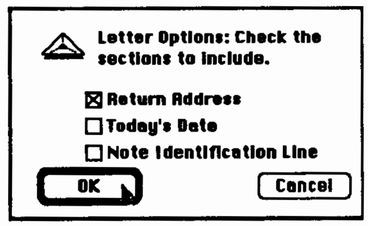
Letters, Memos & Notes

Letters, form letters, notes, and memos are stored in C.A.T. as event records. (See chapter 3 for details on creating letters.)

You select the letters to print using the Events Snapshot window. Manipulate the contact, activity, and time buttons to display the letters you want.

Letter Options

Choose Letter Options from the Edit menu and a dialog box will appear.



You can click to check or uncheck items. If you will be printing letters on letterhead, uncheck the "Return Address" option. If you will be printing memos and notes for your own use, check the "Note Identification Line" option to print a date/contact/activity reference at the top of each page. Make your selections and click OK.

Format Options

To change the fonts, sizes, and styles of your text, use Set Format and select the "Letter/Notes" option.

Printing One Item

To print one specific letter, memo, or note:

- Display the item you wish to print in the Event window.
- Select your options, then choose Print from the File menu.
- Select the "Letter/memo/note" option.
- Click Print.

C.A.T. does not support printing letters in the Draft mode on the ImageWriter.

Printing a Batch of Letters

To print a batch of letters, memos, and notes:

- Select the events to print in the Events Snapshot window.
- Choose Print from the File menu.
- Select the "All Notes" option.
- Click Print.

If printing is interrupted and you wish to resume from a specific event record, select the "Start with the current..." option under Preferences in the Edit menu. Then activate the Events Snapshot window, highlight the event to resume with, and choose Print again.

C.A.T. will print the information in the Note field of each event as a single document. Each note is printed on a separate page.

Sample Letter:

ABC Corp.
3400 Main Street
Sacramento, CA 99999

Jun 1, 1987

Mary Smith
ABC Corp.
4381 Broadway
Artesia, AZ 34598

Dear Mary,

As you know, every year the club sponsors a fundraiser to raise money for special projects. This year, we would like to invite your participation.

There will be a committee meeting held on Wednesday, June 10th at 7 P.M. We hope you can join us.

Sincerely yours,

James Mitchell
Chairman

Sample Memo:

6/1/87 Wyatt @Park Plaza Industries

To: Alicia
From: JD
Date: Jun 1, 1987
RE: Fundraiser

Prepare a list of potential donors and draft a campaign letter.
Letters must be mailed by June 5th.

Sample Note:

6/1/87 Ferenzak @Hidalgo, Inc. Activity: Standard Note

Ruth,

Our plans for the fundraiser are progressing smoothly.
Alicia is handling the list of donors and sending out letters.
Let me know if you need additional information.

John
cc: JC

Lookup Codes List

The "Lookup Codes List" is a reference report that shows all of the codes in each of your Lookup Tables. Each table is alphabetized.

To print:

- Choose Print from the File menu.
- Select the "Lookup Code List" option.
- Click Print.

Feb 13, 1988

ABC Corp.
1526 Grove Street
Cupertino, CA 95643

Lookup Tables

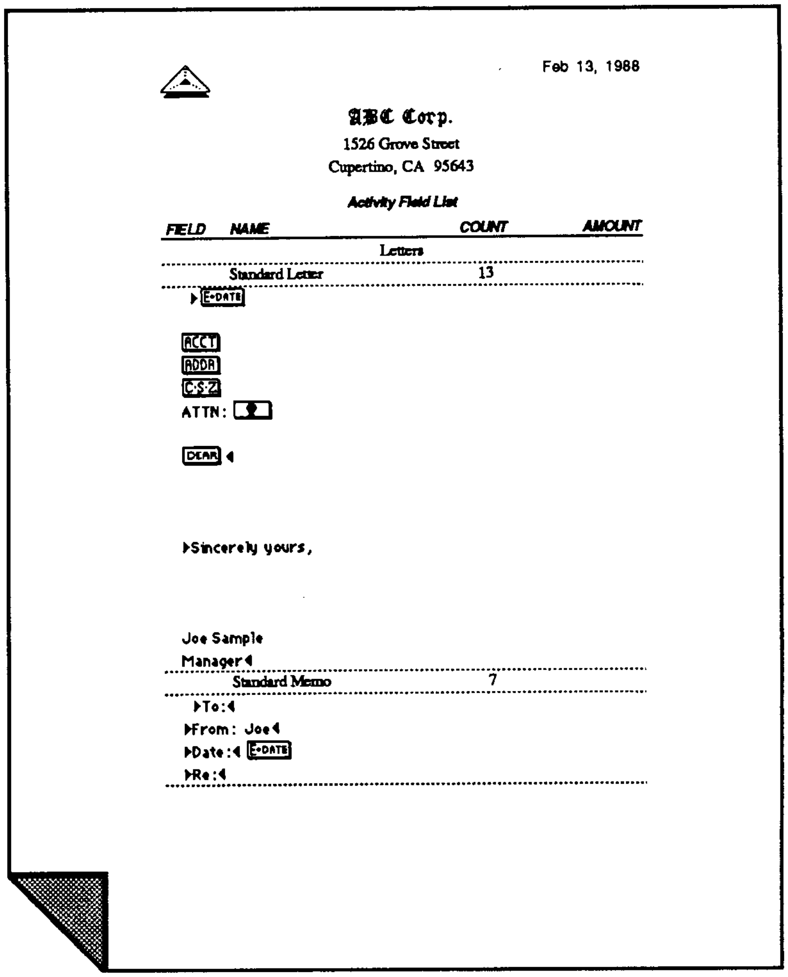
#	DESCRIPTION
	Country
1	Canada
2	England
3	France
4	Germany
5	Japan
6	Mexico
7	U.S.A.
	Account Type
1	Client
2	Customer
3	Employee
4	Personal

Activity List

The "Activity List" is a reference report that shows all of the activity records that have been entered in your database. Activities are grouped by class and printed in alphabetical order.

To print:

- Choose Print from the File menu.
- Select the "Activity List" option.
- Click Print.


Feb 13, 1988

ABC Corp.
1526 Grove Street
Cupertino, CA 95643

Activity Field List

FIELD	NAME	COUNT	AMOUNT
	Letters		
	Standard Letter	13	

ACCT
ADDR
C-S-Z
ATTN:

DEAR

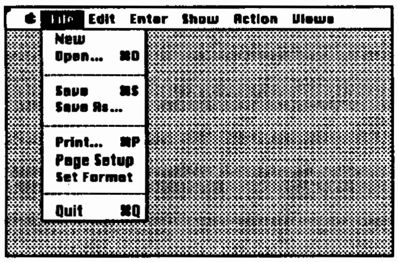
Sincerely yours,

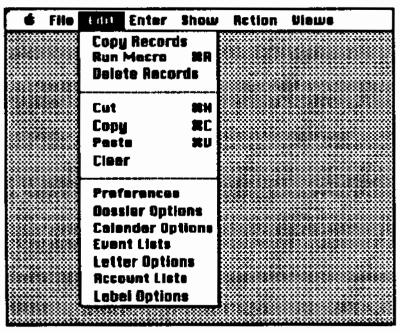
Joe Sample
Manager

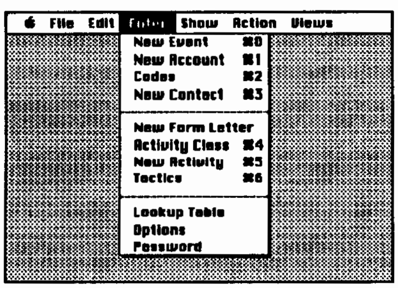
	Standard Memo	7	

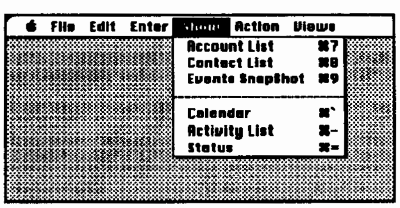
To:
From: Joe
Date: E-DATE
Re:

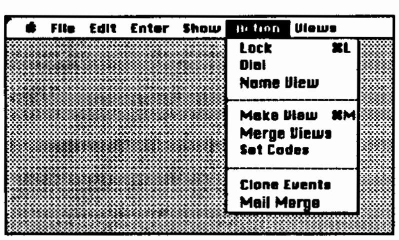
Command Reference











This chapter describes each C.A.T. command. A command is an instruction to the computer to perform an action.

Some commands tell C.A.T. to open List or Entry windows. Descriptions are given for the fields and buttons in every window.

The commands are arranged in the order in which they appear on the menus. For an alphabetical list of commands, look in the index.

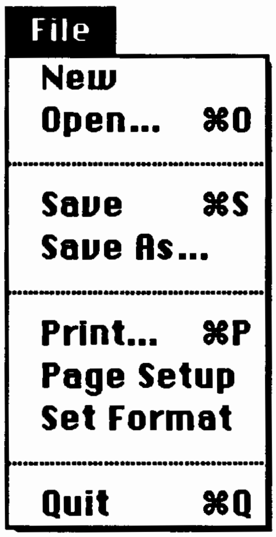
C.A.T. has six menus: File, Edit, Enter, Show, Action, and Views.

- The File menu commands are used to load and save files, format and print reports, and end a C.A.T. session.
- The Edit menu includes commands to set preferences and report options. This menu also contains C.A.T.'s special commands for importing and exporting data, as well as standard Macintosh commands for copying and pasting text.
- The Enter menu includes commands to enter account, contact, activity, and event records as well as lookup tables, options, and the system password.
- The Show menu commands open or activate List windows which show your accounts, contacts, activities, and events. This menu also has commands to open the Calendar and Status windows.
- The Action menu commands are used to name, make, and merge views; set codes; and clone events.
- The sixth menu called Views lists all of the views that you create.

File Menu

There are eight commands under the File menu. These commands are used to:

- Create a new C.A.T. database.
- Open an existing database.
- Save data.
- Rename a file.
- Print reports.
- Set page options for printing.
- Set fonts, sizes, and styles for printed documents.
- Exit C.A.T.



New

New is used to start a new C.A.T. database.

When you choose New from the File menu, C.A.T. will automatically create an empty database with the filenames "Untitled" and "Untitled-NOTES." All C.A.T. records, options, and notes are saved as a database in these two Macintosh files.

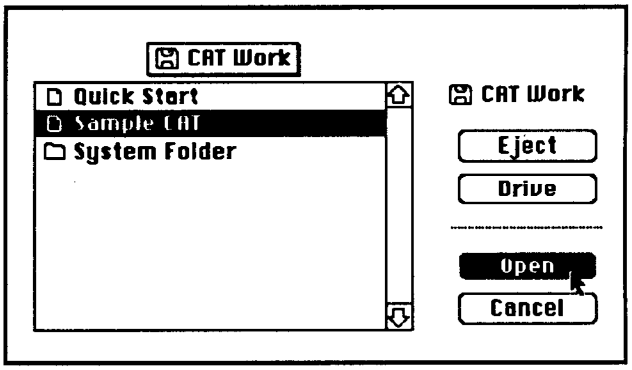
If you choose New while working with an existing database, C.A.T. will give you the opportunity to save changes before creating the new file. C.A.T. allows you to open one database at a time.

Open

The Open command is used to open an existing C.A.T. database.

If you have made changes to the existing database, the Open command will give you an opportunity to save your work prior to opening the new database.

When you choose Open from the File menu, a dialog box will appear. Click to select the filename you want, then click the Open button as shown below:



Each C.A.T. database is stored as two Macintosh files. Using the filename you selected, C.A.T. will search for a corresponding notes file. If a notes file cannot be found, a dialog box will appear with an explanation of your options. Click as appropriate.

To load files from another drive, a separate disk, or from Macintosh's folder structure, click to select in the dialog box shown above. See your Macintosh Owner's Manual if you need help.

Save

Save is used to save your data on disk.

C.A.T. keeps new entries in your Macintosh's memory. As a result, you can work quickly and see updates on-screen immediately.

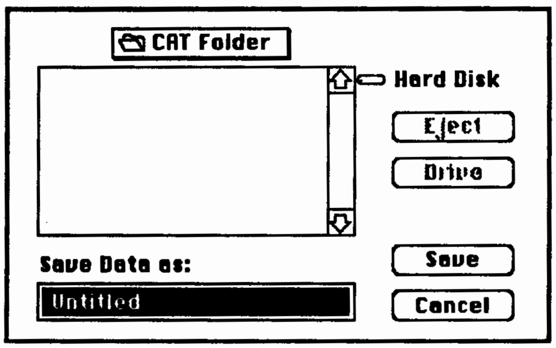
New entries are not saved to disk until you use the Save or Save As commands. After you choose Save, C.A.T. will confirm the action with a message reading: "SAVED to Disk!... back up your data." Click or press any key to continue working with the same database.

Note that if a power failure interrupts your C.A.T. session, all of the information entered since the last time you saved will have to be reentered. Data entered prior to the current session would still be intact. It is recommended that you save periodically and back up your database regularly.

Save As

The Save As command saves the current file to a new filename.

When you choose Save As from the File menu, the following dialog box will appear:



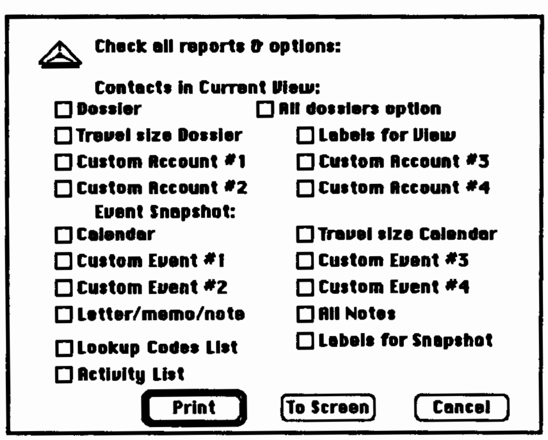
The default name for a new database is "Untitled." Enter any name you wish and click Save. Two files will be created: one icon with this name will hold your data; another icon with the same name followed by "-NOTES" will hold your notes file. (For information on storing your data and notes files on separate disks, see "About C.A.T. Files And Disk Management" in appendix E.)

Print

The Print command is used to print documents such as dossiers, letters, notes, mailing labels, and reports.

Note that there are many commands related to the printing of reports. (See chapter 4, "Printing Reports," for an overview and examples of each report.)

When you select Print from the File menu, the following dialog box will appear:



Print

Click to check or uncheck items. You can select more than one item at a time. After you make your selections, make sure your printer and paper are properly set. Then click the Print button.

A dialog box with your printer options will appear. Note that C.A.T. uses the standard Macintosh dialog boxes for printing with the ImageWriter or LaserWriter. See your printer manual if you need more information about the options displayed.

Click OK in the printer options box and the program will begin printing your selected item(s). If you need to cancel printing in progress, click the Cancel button displayed on the screen or press the "Cmd ." (command period) keys on the keyboard.

To Screen

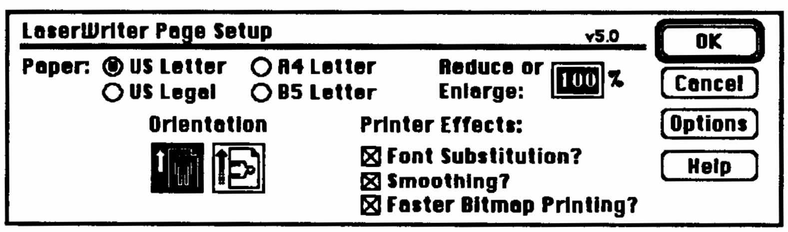
To see how a letter, note, or report will look before printing, make your selections in the dialog box shown above, then click the To Screen button.

If you made more than one selection, click the Next button to see each page one after the other. Click Cancel to return to the C.A.T. screen.

Page Setup

Page Setup is the standard Macintosh command used to control the page size and appearance of printed documents.

When you choose Page Setup from the File menu, a dialog box similar to the following will appear (depending on the printer you use):



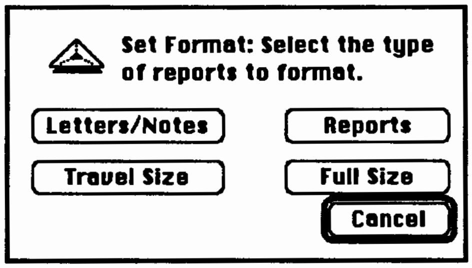
C.A.T. uses the standard Macintosh dialog boxes for printing with the ImageWriter or LaserWriter. (See your printer manual if you need more information about the options displayed.)

Set Format

.t is used to change the fonts, sizes, and styles of text on ...d document. C.A.T. lets you decide how your dossiers, letters, ...emos, notes, reports and mailing labels will look.

Type of Document

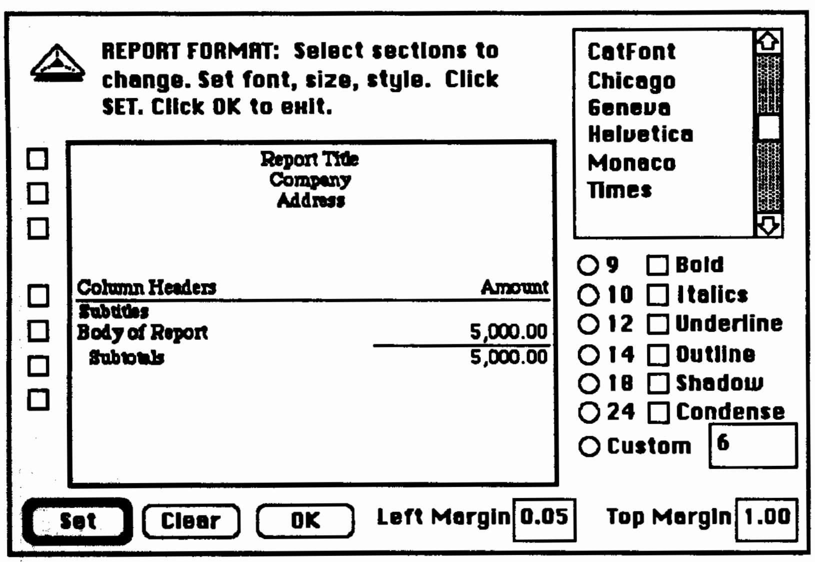
When you choose Set Format from the File menu, a dialog box will appear:



Select:

Letters/Notes	**to format letters, memos, and notes.**
Reports	**to format reports such as Account and Event Lists.**
Travel Size	**to format travel-size (7"X 7") dossiers, calendars, and mailing labels.**
Full Size	**to format full-size (8-1/2"X11") dossiers and calen dars.**

After you make your selection, another dialog box will appear:



On the far left side are seven boxes that correspond to the seven sections that can be changed.

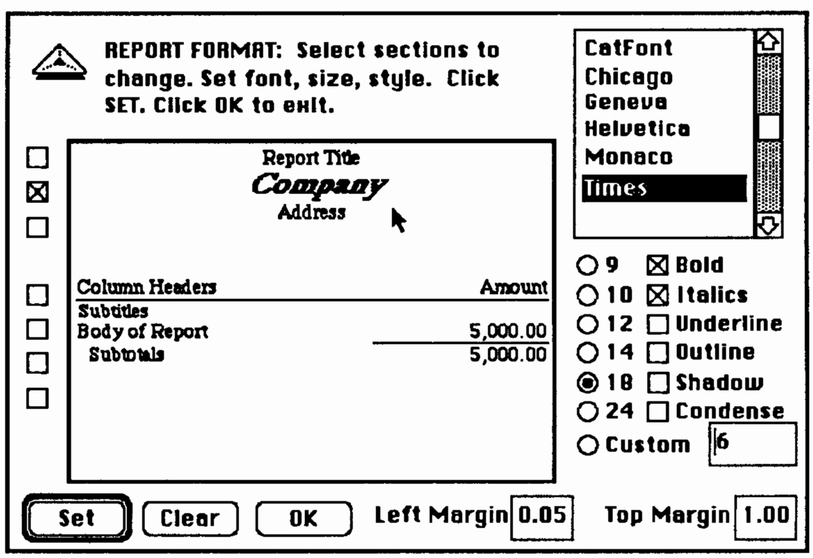
Column Width The font size of the text for the Column Header section controls the width of each column of the report. By choosing a smaller font size for the body section than the Column Header section, you can avoid the clipping of information caused by columns that are too narrow. (Also, you can use the reduction factor available on the Page Setup command to make reports fit onto your paper.)

Click to check the box beside the section to be modified.

Fonts In the upper right corner are the fonts available. The number of fonts available is determined by your particular System file. You can scroll to see others. Click once to highlight the font you want.

Sizes & Styles Below the fonts are the size and style options. Click the buttons beside the point size and style desired. If you need a size other than those listed, click the button beside Custom and type a number in the field.

After you make your selections, click the Set button in the lower left corner. The sections selected will change immediately to show your choice of font, size, and style. For example, the illustration below shows a selection of Times, 18-point, Bold, Italic for the company name section:



Note that each section can be a different font, style, and size. Set each selection separately.

Clear

To clear your selections for the current sections checked (i.e., uncheck them), click Clear.

Margins

In the bottom right corner of the dialog box, there are also boxes to adjust the left and top margin widths.

After all selections are set, click OK to return to the main screen. Then use the To Screen option on the Print dialog to see how the item will look before you actually print it.

Quit

Quit is used to exit C.A.T.

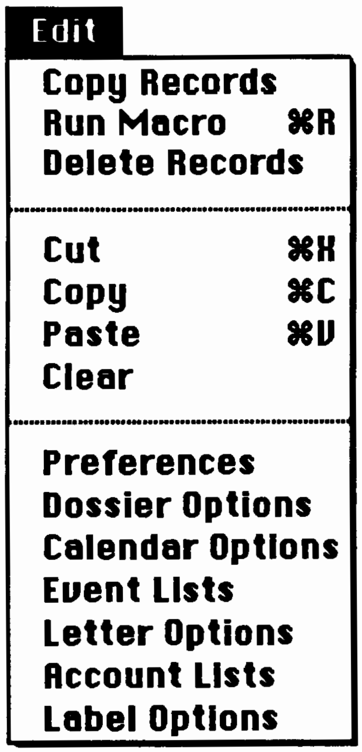
When you choose Quit from the File menu, C.A.T. will exit immediately if no changes have been made to your file.

If changes have been made, C.A.T. will give you the opportunity to save before exiting.

Edit Menu

There are 14 commands under the Edit menu. These commands are used to:

- Export data from one C.A.T. file to another C.A.T. file or to other applications.
- Import data from other databases (via spreadsheets) into C.A.T.
- Delete multiple records at one time.
- Cut, copy, paste, or clear information from one field to another field or application.
- Choose program use preferences.
- Select options for printing dossiers, calendars, event lists, letters, account lists, and mailing labels.



Copy Records

Copy Records is used to export data from one C.A.T. file to another C.A.T. file or to other applications. You use Copy Records to pass:

- A single record,
- An entire view,
- A snapshot of events,
- A set of related records,

Exporting Records

or any combination of records to the clipboard. From the clipboard, the records can be sent to:

- Another C.A.T. database,
- A spreadsheet,
- A word-processing program, or
- Any application that accepts tab-delimited files.

Sending Records The records sent to the clipboard are compatible with all communication programs. Using simple Copy and Paste commands available in most programs, the clipboard text may be transferred electronically through local area networks, modems, or mainframe computers. For example, you can paste the clipboard contents produced by Copy Records into a "memo field" of an electronics mail software program and send the data to another user.

Receiving Records The receiving application can also use Paste to accept the results of Copy Records. If the receiving application is another C.A.T. database, you can tell Copy Records to insert special codes that allow the receiving C.A.T. to properly place account, contact, activity, and event records in the proper places. Using the Run Macro command, C.A.T. then adds the new records into the current database. In a spreadsheet, the data would be pasted into cells of a spreadsheet -- one field per column and one record per row.

Using Copy Records To use Copy Records, select the records to copy using any List window. For example, if you want to copy a single account, activate the Account List; click to highlight the account to copy; and select Copy Records from the Edit menu.

If you want to copy all events from the Events Snapshot window, activate Events Snapshot, identify the events you want, and choose Copy Records.

(Make sure no single event is highlighted. If one is, only that entry will be copied. Click on a blank row, if necessary, to prevent this.)

Copy Options Depending on which window is active, Copy Records displays a dialog box with the following options:

- Use the C.A.T. format. (This inserts commands in the data that tell the Run Macro command which window to use for which records. If you do not choose this option, records are copied using the tab-delimited format of a spreadsheet.)
- Include record notes with the data copied.
- Include linked records with the record to be copied. For example, if an account is selected, you can choose to pass all contact and event records as well.
- Pass notes only, in the word-processing format.

Click to select the options you need and click OK. The data is copied to the clipboard. (For examples of Copy Records applications, see appendix A.)

Run Macro

Run Macro is used to import data records from the clipboard into C.A.T.

The contents of the clipboard can be prepared by C.A.T. using the Copy Records command or using a spreadsheet program. (To see full instructions for importing data into C.A.T. from spreadsheets, see appendix A.)

How It Works

Run Macro accepts keystrokes from the clipboard. All characters of the text in the current clipboard become keystrokes, as if you had entered them one by one through the keyboard.

In addition to alpha-numeric characters that become field values in C.A.T., the Run Macro command also handles certain special characters, including:

Tab	**Causes C.A.T. to move to the next field.**
Return	**Ignored.**
{*x*}	**Command keys.**

The { symbol tells C.A.T. that the next character is a keyboard command. For example, if *x* were the number 1 in C.A.T., pressing "Cmd 1" on the keyboard means activate the Account window. "{1}" in the text of the clipboard would tell C.A.T. to perform the same command. Similarly, if *x* were the letter E, pressing "Cmd E" on the keyboard is equivalent to clicking the Enter button on Entry windows; "{E}" tells C.A.T. would put the record away.

The Copy Records command automatically inserts tabs, returns, and command keys between records to tell the Run Macro command how to handle the incoming text.

Using Run Macro

To use Run Macro, prepare the contents of the clipboard using the Copy Records command or using a spreadsheet. Then choose Run Macro from the Edit menu and click OK.

Watch as C.A.T. visually activates windows and enters text automatically into your database. (For examples of Run Macro applications, see appendix A.)

To cancel the Run Macro process, click the mouse button at any time.

Delete Records

Delete Records removes multiple records from your database using a single command.

To delete multiple records, display the records to be deleted in a list window. For example, to delete all events associated with an activity, show all those events in the Events Snapshot window and choose Delete Records from the Edit menu. The command will request you to confirm your intent prior to proceeding.

When you elect to delete a list of account records, C.A.T. will also delete the contacts and events that are linked to these accounts, if any. Similarly, when you delete contacts, C.A.T. will delete all events linked to these contacts.

If you delete an activity record, C.A.T. does not delete the events linked to this record. C.A.T. unlinks the events so that the events are linked to no activity. If you wish to delete these events, use Delete Records on these events prior to deleting the activity record.

When you save to disk, the records will be permanently deleted from your file.

Cut/Copy/Paste/Clear

C.A.T. uses the standard Macintosh commands for editing text within fields. Each command is described here. Refer to your Macintosh Owner's Manual if you need help.

- The Cut command removes a selection and places it on the clipboard. Any previous contents of the clipboard will be replaced.
- The Copy command places a copy of a selection on the clipboard. Any previous contents of the clipboard will be replaced.
- The Paste command inserts a copy of the contents on the clipboard at the insertion point.
- The Clear command removes a selection without placing it on the clipboard.

These commands are particularly useful when working with text in Note fields (i.e., preset text in the Activity window) and when transferring text from one application to another.

Preferences

Preferences are used to set screen and print options.

Choose Preferences from the Edit menu and the following dialog box will appear:

Check all preferences: [OK]

Screen Options:

- [x] Show warning messages on text, amount and date entry.
- [x] Automatically create codes and activities. [Cancel]
- [x] Search using alias of accounts/contacts/activities.
- [ ] Early bird. Assume 7 and 8 mean AM - not PM.
- [ ] Automatically enter changes to an event record.
- [ ] On zoom, close the current window.

Print Options:

- [ ] Assume lookup table #1 contains Country information.
- [ ] Expand travel size reports to full page length.
- [ ] Print all dossiers and labels starting with current.

Make your selections and click OK. When you save, your selections will be saved as well. You can change these options any time you wish. Each option is described below.

- **Show warning messages...** lets you choose to see warning messages on-screen or not. If you choose this, the program will let you know when irregular entries are made.
- **Automatically create codes and activities.** This simplifies data entry for you. Choose this option if you want to enter new account codes directly in the Codes window, new contact codes directly in the Contact window, and new activities directly in the Event window.
- If you enter aliases for your accounts, contacts, or activities, you can choose to search for them by alias in clairvoyant fields. Just check **Search using alias...**
- When you enter time to schedule events, C.A.T. assumes 9, 10, and 11 are "A.M." hours, and that 12, 1, 2, 3 through 8 are "P.M." hours. If you want C.A.T. to assume 7 and 8 are "A.M." hours, check the **Early Bird...** option.
- **Automatically enter changes to an event record.** When you select this option, changes to event records are entered automatically. You do not have to click the Enter button.

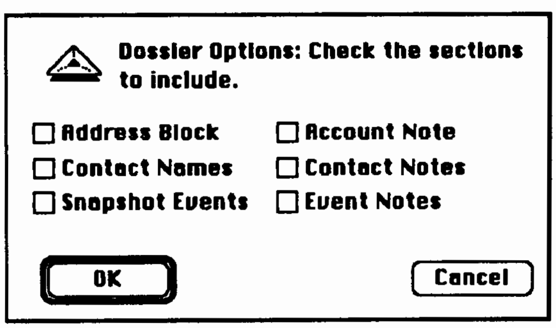
- If you prefer C.A.T. to close windows as you go from one window to another, check **On zoom, close...** For example, if you click on a highlighted account in the Account List to display the Contact List, the Account List window will first close.
- When you select **Assume lookup table #1...** , C.A.T. will assume table 1 contains country codes and will include the information on mailing labels. This option is for labels only.
- Travel-size reports are normally 7"X7" and print out in smaller type in notebook-size format. If you want the report in the same format but on a full page, select **Expand travel size...**
- When you instruct C.A.T. to print all dossiers, it normally prints them in alphabetical order starting with the first account displayed in the Account List window. If you were printing 100 letters and the printer jammed on the 75th one, you could select the **Print... starting with current** option. Then resume printing by clicking once to highlight the 75th account in the Account List window, and choose the Print command again.

  Similarly, if the printer jams while you are printing "All Notes" from the Events Snapshot window, you could select this option to resume printing by clicking once to highlight an event in Events Snapshot. Then choose the Print command again.

Dossier Options

Dossier Options let you choose what information will print on dossiers.

When you choose Dossier Options from the Edit menu, the following dialog box will appear:

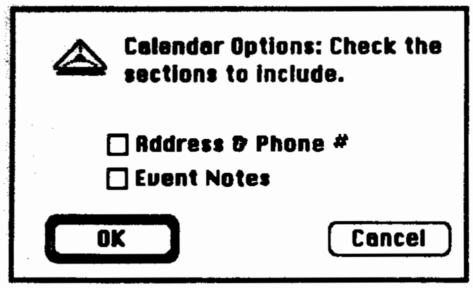


Make your selections and click OK. (See chapter 4, "Printing Reports," for sample dossiers.)

Calendar Options

Calendar Options let you choose what information will print on the calendar report.

When you choose Calendar Options from the Edit menu, the following dialog box will appear:

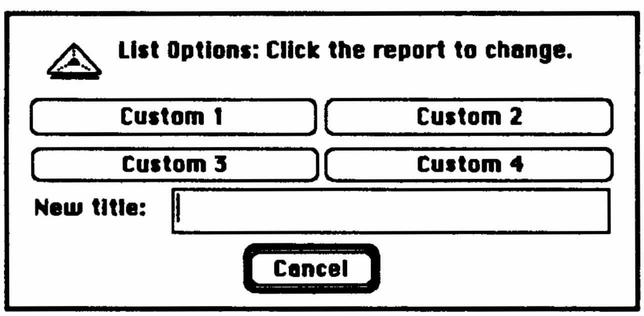


Make your selections and click OK. (See chapter 4, "Printing Reports," for sample Calendars.)

Event List Options

Event Lists options specify what information will be included on Event Lists.

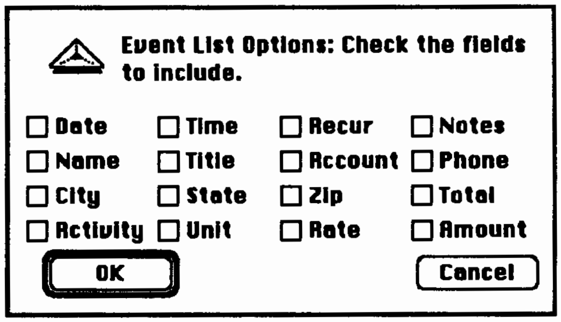
When you choose Event Lists from the Edit menu, the following dialog box will appear:



You can customize up to four lists at a time. There is one button for each list. Of course, you can change them any time as new reports are needed.

Initially the names of the lists appear as Custom 1, Custom 2, etc. Enter a name for the list in the New Title field. This name will appear in the Print dialog box and on the report. Then click to select one of the buttons.

Another dialog box will appear with the Event List Options:

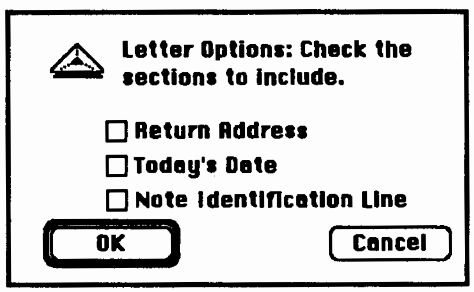


Make your selections and click OK. (See chapter 4, "Printing Reports," for sample event lists.)

Letter Options

Letter Options let you choose what information will print on letters as well as memos and notes.

When you choose Letter Options from the Edit menu, the following dialog box will appear:



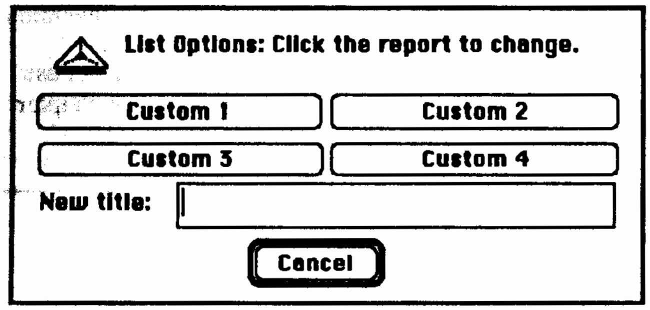
If you are using letterhead, uncheck the Return Address option.

If you are printing notes for your own use, you can select the Note Identification Line option which will print the date, contact name, and activity at the top of the page. It also directs your filing clerk to the proper file folder.

Make your selections and click OK. (See chapter 4, "Printing Reports," for sample letters and notes.)

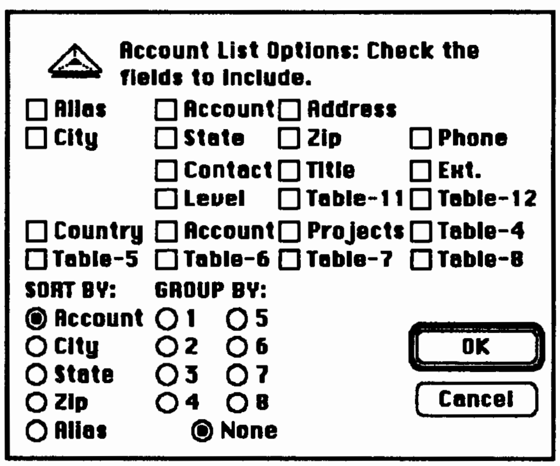
Account List Options

Account Lists options specify what and how information will print on Account Lists. When you choose Account Lists from the Edit menu, the following dialog box will appear:



You can customize up to four lists at a time. There is one button for each list.

Initially the names of the lists appear as Custom 1, Custom 2, etc. Enter a name for the list in the New Title field. This name will appear in the Print dialog box and on the report. Then select one of the buttons. Another dialog box will appear with options:



In addition, you can choose how accounts will be sorted and grouped. There are five options for sorting. If you choose "State," then all of your accounts will be listed in alphabetical order by state. Sorting by "Account," "City," or "Alias" will also list accounts in alphabetical order; sorting by "Zip" will list them in zip-code order.

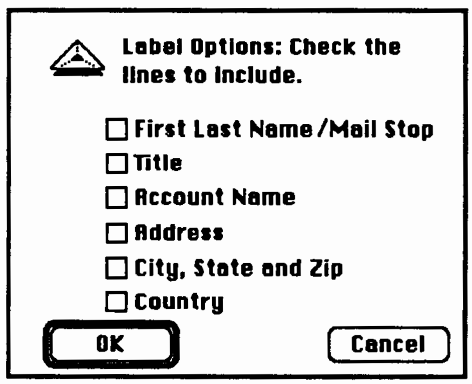
The numbers under "Group By" refer to the eight lookup tables that you can set up for accounts. If you choose to group by "3," then your accounts will be grouped according to the codes that you have in table 3. Each of the codes becomes a subtitle, and following the subtitle is a listing of the accounts.

Note that you may make one selection for sorting and one for grouping for each report.

Make your selections and click OK. Prior to printing, you can use the To Screen option to see how the report will look. (See chapter 4, "Printing Reports," for sample account lists.)

Label Options

Label Options are used to choose what information will print on labels. When you choose Label Options from the Edit menu, the following dialog box will appear:



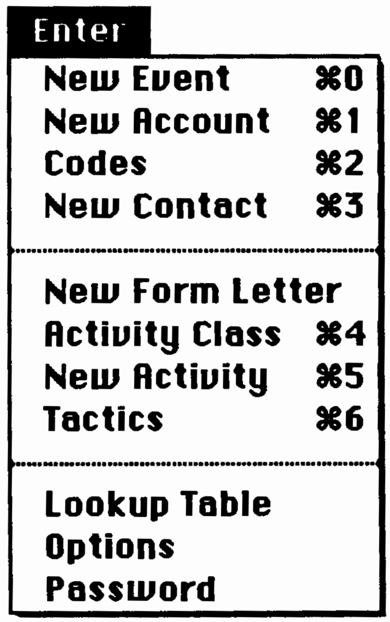
Note that mail-stop information will print on the same line as the contact's name, and country information will print on the same line as the city, state, and zip.

Make your selections and click OK. (See chapter 4, "Printing Reports," for sample labels.)

Enter Menu

There are eleven commands under the Enter menu. These commands are used to enter:

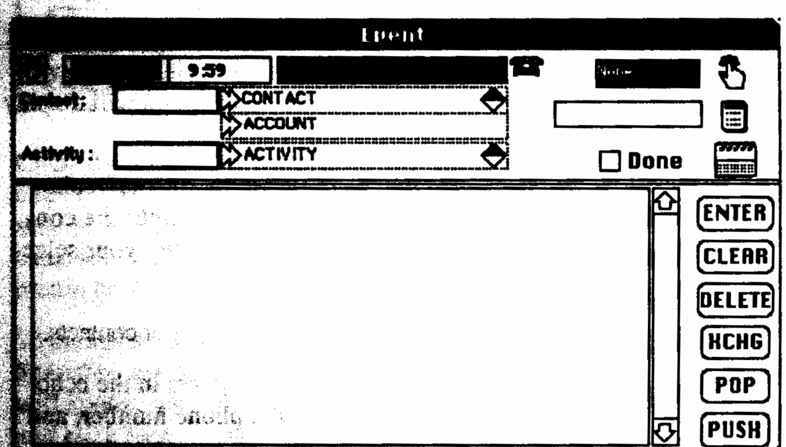
- Event records.
- Account records.
- Account codes.
- Contact records.
- Form letters.
- Activity classes.
- Activity records.
- Activity tactics.
- Codes in lookup tables.
- User options including your company name and password.
- A system password.



New Event

New Event is used to enter event records. An event is a record of an activity with a contact on a specific date and time.

When you choose New Event from the Enter menu, the Event window will appear:



Note that the Date, Time, and Contact are the only required fields for recording events. All other fields are optional.

Date and Time Fields

The current date set on the C.A.T. Calendar and the current time set on your Macintosh clock are automatically displayed in the Date and Time fields. To schedule an event for a different date and time, use the normal Macintosh editing conventions and type directly in those fields.

C.A.T. allows free-form entry for dates. The following date conventions are accepted:

MM/DD/YYYY	**M/D/19YY**	**DD**
MM/DD/YY	**M/D**	**D**
MM/DD		

Note that dates must be entered numerically and that slashes (/) must be used to separate the month from the date from the year.

The following date conventions are not accepted by C.A.T.:

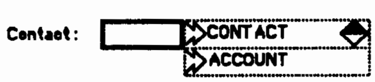
MMDDYY	**No slashes.**
Jan 3, 1987	**Not completely numeric.**
1987/3/4	**Year cannot precede month and day.**

When entering time, C.A.T. assumes 9, 10, and 11 are "A.M." hours and that all other hours are "P.M." hours. If you prefer 7 and 8 to represent "A.M.," then set the Early Bird option under Preferences. Acceptable time conventions are:

9	**9:00**	**1PM**
9AM	**9:00A.M.**	**13:45**
9A.M.		

Contact Field

Every event must be linked to a contact. There are three ways to select a contact. You can:



- Type the contact's first name, last name, or alias in the clairvoyant field. C.A.T. will look for names that match and will display them in the echo field.

- Click once on the Goto arrow in the Contact or Account echo field and a List window will appear; click to highlight the contact you want; then reactivate the Event window and your selection will appear.

- Click the Next button to scroll through the current list of contacts.

The link is complete when the correct contact appears in the echo field. Note that each contact's company name, phone number, and extension (if any) will be displayed as well.

Activity Field

Every event may be linked to an activity. Similar to contacts, there are three ways to select an activity. You can:

- Type the activity name (e.g. Introduction Letter) in the clairvoyant field. C.A.T. will look for names that match and display them in the echo field.

- Click on the Goto arrow in the Activity echo field and the Activity List window will appear; click once to highlight the activity you want; then reactivate the Event window and your selection will appear.

- Click the Next button to scroll through the current list of activities.

The link is complete when the correct activity name appears in the echo field.

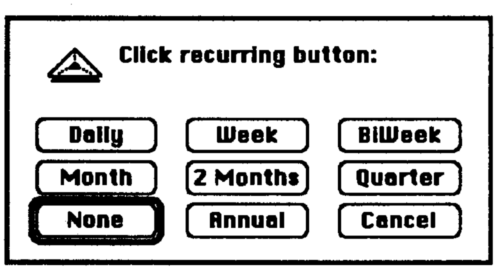
If you enter a new activity name by typing the new name, C.A.T. automatically creates a new activity with that name.

Note Field

In the Note field, you can enter up to 32,000 characters or 16 single-spaced pages of any information you wish.

If the activity entered for the event includes preset text, that information will appear in this field. Use the scroll bar or arrows to scroll through the field.

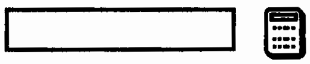
If an event occurs on a regular basis (i.e., monthly board meetings), click the Recurring button and the following dialog box will appear:



Click the button that represents the frequency of recurrence, then click Enter in the Event window. The event will automatically be scheduled on your calendar continually until you change it. For example, if you select "Month," C.A.T. will show the event every month on Events Snapshot starting with the current month.

To cancel a recurring event, first display the event in the Events Snapshot window. Then double-click on it, and the Event window will appear with the record displayed. Click the recurring button and click None. Then click Enter in the Event window.

Calc Button & Amount Field



The Calc button can be used to calculate amounts entered in the Note field. Enter each amount on a separate line with "$" signs, then click Calc. The total will appear in the amount field to the left of the Calc button.

The Calc button can also be used to capture elapsed time which may be useful for billing purposes. (See "Managing Time" in chapter 3 for examples of these uses.)

The amount field to the left of the Calc button can show various types of information:

- A total calculated from amounts entered in the Note field.
- A total for elapsed time.
- Any amount that you wish to type directly in the field.

Information entered in this field will appear in the Amount column of the Events Snapshot window.

☐ **Done**

If an event does not require any further attention, click to check the Done box. In the Events Snapshot window, "Done" events will not be checked in the To Do column.

Click this button as a short cut to go to the Events Snapshot window.

ENTER

Click the Enter button to record the event. Events are listed in the Events Snapshot window.

CLEAR

To clear all of the fields in the Event window, click Clear. Note that Clear does not delete the current record. It clears the window for new entries.

DELETE

To delete an event, first display it in the Event window. Then click the Delete button. C.A.T. will ask you to confirm the action. Click OK and the event will be deleted.

XCHG

POP

PUSH

These buttons are designed to handle interruptions and allow you to work with more than one event at a time. You PUSH event records aside and POP them back to continue working.

- PUSH enters a record and sets it aside in a "stack." You can push aside up to 100 records at one time and they will be neatly stacked one on top of the other.

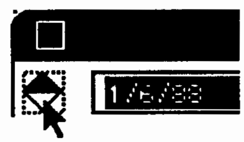
- POP redisplays the events in the Event window, starting with the record on top. The last one pushed is the first one popped.

- XCHG exchanges the current event with the event at top of the stack. The event at the top of the stack shows on screen and the current event becomes the top of the stack.

Finding & Reviewing Events

To find events, use the Events Snapshot window. For example, identify a to-do list of events that needs to be handled.

- Double-click on the first event in the Events Snapshot window, and the Event window with your event will appear.
- Use the Next button beside the Date field in the Event window to scroll through the list of events in Events Snapshot. With each click, C.A.T. shows the next event.



You can review one record after another in this way.

Changing Events

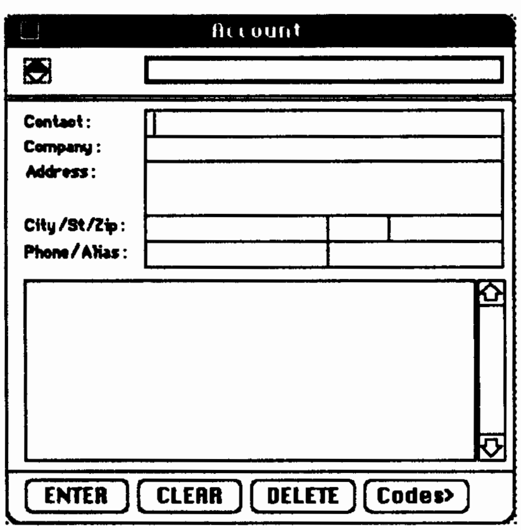
To change the data for an event, use the Events Snapshot window to find and display the record in the Event window. Then make your changes and click Enter or Push.

You can change the contact, activity or time fields; as well as the date, notes and amount.

New Account

New Account is used to enter new accounts. Accounts can be companies, organizations, or individuals.

When you choose the New Account command from the Enter menu, the following window will appear:



Search Field

The heavily outlined field at the top of the window is a clairvoyant search field. To find an existing account record, type its name or alias and C.A.T. will find records that match.

The Next buttons in the upper left corner of the window are used to scroll through the list of accounts currently displayed in the Account List window.

Contact Field

If you work with individuals who are not associated with companies, enter their full names in the Contact field and leave the Company field blank. When you click Enter, C.A.T. will automatically create an Account record with the individual's Last Name as the Account name; and a Contact record using the individual's Full Name.

For example, if you enter Jackie Smith in the Contact field and leave the Company field blank, C.A.T. will use "Smith" as the account name and create a Contact record for "Smith, Jackie."

Company & Address Fields

Enter company names in the Company field. If there is no company name, you can leave the field blank.

Enter the Address, City, State, Zip, and Phone for each account in the appropriate fields. This information, which can be entered in any format, will be displayed in various windows and print on reports. Press the Tab key or click with the mouse to move from field to field.

Alias Field

Aliases help differentiate accounts with similar or long names. If you prefer to identify an account by something other than its name, enter an Alias. Aliases can be abbreviations, acronyms, or numbers. Then you can set Preferences (under the Edit menu) to search for accounts by alias.

Notes Field

In the Note field, you to enter up to 32,000 characters or 16 single-spaced pages of any text you wish. This information will print on dossiers only. Use the scroll bar and arrows to scroll through the field.

ENTER

To record an account, click the Enter button at the bottom of the window. Accounts are automatically sorted in alphabetical order and shown in the Account List window.

CLEAR

To clear all of the fields in the Account window, click the Clear button at the bottom of the window. Note that Clear does not delete the current record shown. It clears the fields for new entry.

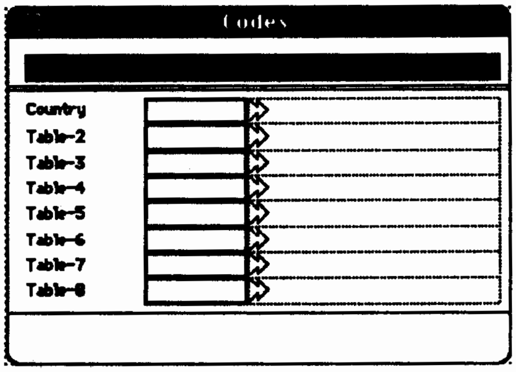
To delete an account, first display it in the Account window. Then click the Delete button. C.A.T. will ask you to confirm the action. Note that all contacts, events, and notes associated with the account will be deleted as well. Click OK and the record(s) will be deleted.

Click the Codes> button to go to the Codes window. The Codes window is used to enter account codes from lookup tables. See the Codes command in this section.

Codes

The Codes window is used to select the account codes you use to categorize and group account records. Codes can be preset entries in the Lookup Table or automatically created as you need them. For each account, you can set up to eight codes, one from each table. (For discussion on setting up tables, see chapter 3, "Managing Contacts.")

To set codes for an account, find the account using the Account window.



Codes Fields

For each clairvoyant field, type a code name, and C.A.T. will display names that match in the echo field.

If you choose Preferences from the Edit menu and select the "Automatically create codes..." option, then you can enter new codes directly in any of the clairvoyant fields. C.A.T. will ask you to confirm whether the new entries should be added to the appropriate lookup table.

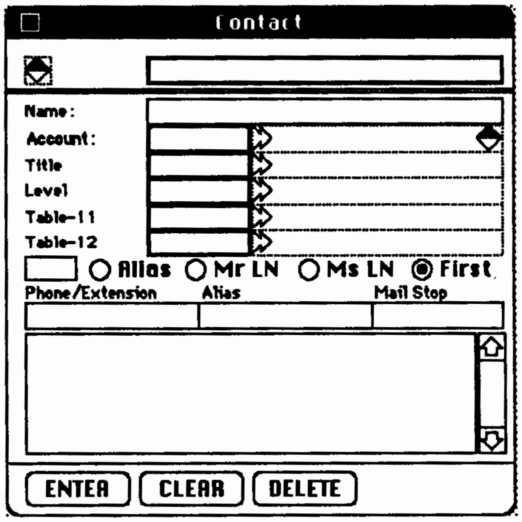
When you are done setting codes, activate the Account window and click Enter.

You can click the Goto arrow beside any field to display the selected lookup table. Double-click on the code you want and it will be inserted in the Codes window.

New Contact

New Contact is used to enter and alter contact records.

Choose New Contact from the Enter menu and the following window will appear:



Search Field To display existing contact records, type a name or alias in the clairvoyant search field and C.A.T. will display names that match.

In the upper left corner of the window, click the Next button to scroll alphabetically through the list of contacts for the current account.

Name Field You can enter a contact's first name followed by the last name (John Smith) or the last name, followed by a comma, followed by the First Name (Smith, John). C.A.T. will automatically sort by last name.

Account Field Every contact must be linked to an account. There are several ways to link the appropriate account. You can:

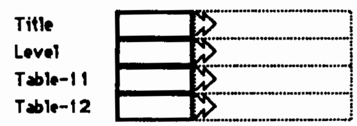
- Type the account name and C.A.T. will find names that match.

- Click on the Goto arrow and the Account List window will appear; click to highlight the account you want; then reactivate the Contact window.
- Click the Next button in the Account echo field to scroll through the current list of accounts.

The link is complete when the correct account appears in the echo field.

Code Fields

Code fields are used to select codes to categorize your contacts. Codes can be preset entries in lookup tables or created automatically as you need them. (For discussion on setting up tables, see chapter 3, "Managing Contacts.")



To select a code, type a code name in the appropriate clairvoyant field, and C.A.T. will find codes that match.

If you choose Preferences from the Edit menu and select the "Automatically create codes..." option, then you can type new codes directly in the appropriate field. C.A.T. will ask you to confirm whether the new entries should be added to an appropriate lookup table.

You can click on the Goto arrow beside any field, which activates its lookup table. Double-click on the code you want and it will be inserted in the Contact window.

Salutation Buttons

If you will be using C.A.T.'s preset text feature for writing letters, you can designate the greeting. The choices are:

- **First** Dear (First Name):
- **Mr LN** Dear Mr. (Last Name):
- **Ms LN** Dear Ms. (Last Name):
- **Alias** Dear (Alias):

Extension & Other Fields

If the contact has an extension or a direct line that is different from the account number, enter the information here. This number will appear in the Event window when the contact is selected.

The Mail Stop (if any) will print on address labels.

In the Note field, you can enter up to 32,000 characters or 16 single-spaced pages of any text you wish. This information will print on dossiers only. Use the scroll bar and arrows to see more.

To record contacts in C.A.T., click the Enter button at the bottom of the window. Contacts will appear in alphabetical order by last name in the Contact List window.

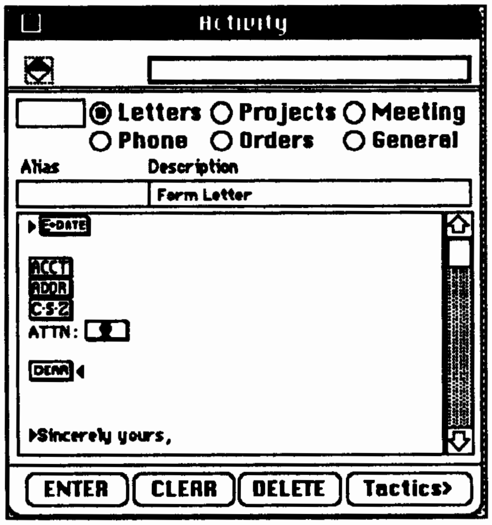
To clear the window, click the Clear button. Clear does not delete information; it clears the record for new entries.

DELETE To delete a contact, find the contact record using the Contact window, then click the Delete button. Note that all events and notes associated with the contact will also be deleted. Click OK and the record(s) will be deleted.

New Form Letter

This command is used to set up form letters. Form letters are stored as Activity records.

When you choose New Form Letter from the Enter menu, the following window will appear:



C.A.T. field references.

E•DATE	Event Date
ACCT	Account Name
ADDR	Street Address
C·S·Z	City State Zip
	Contact's Name
DEAR	Salutation

C.A.T. has already selected the class for this form letter and completed the address and closing blocks of your form letter. If you supplied your name to C.A.T. (using Options under the Enter menu), your name is also included in the closing block.

Supply a name for this letter in the Description field.

If you wish to alter either the address block or closing block, position the data cursor in the preset text blocks and make your changes. Type the body of your form letter following the ► marker in the middle.

When done, click the Enter button.

(The same window is used to enter other types of activities. See the New Activity command in this section for additional information about the general use of this window. See also "Managing Activities" in chapter 3 for more information on form letters.)

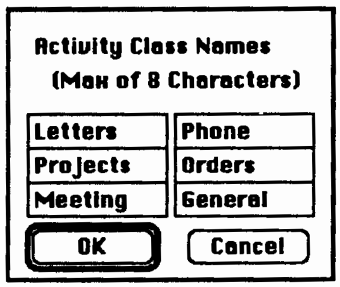
Activity Class

Activity Class is used to name the general categories of your activities. It is like having a file cabinet with six drawers. An "activity class" is a drawer and an "activity" is a folder in the drawer.

When you choose the Activity Class command from the Enter menu, the following dialog box will appear:

You can set up six classes. The names displayed are suggestions only. To change a class, type a new name in any of the fields and click **OK**.

Class names can only be eight characters long. They appear in the Activity and Activity List windows.



New Activity

New Activity is used to enter records for any subject matter that you want to keep track of in C.A.T. Examples of "simple" activities are letters, phone calls or appointments; "significant" activities might be orders, contracts, facts, and statistics.

Choose New Activity from the Enter menu and the following window will appear:

Only the Class button and Description field are required. All other fields are optional.

Search Field The heavily outlined field at the top of the window is a clairvoyant search field. To display existing activities in the Activity window, type the activity name or alias and C.A.T. will find and display the record that matches.

Class Buttons Activity classes are displayed in the upper half of the window. All activities must be assigned to a class. Click to select a class.

Alias Field Enter abbreviated names (a maximum of eight characters) in the alias field.

Description Field Enter a descriptive name for this activity. When linking to activities, you will be searching using either the alias or description names.

Note Field In the Note field, you can enter up to 32,000 characters or 16 single-spaced pages of text if you wish. Use the scroll bar and arrows to scroll through the field.

You also have the option to enter preset text for form letters, data sheets, surveys, and other uses. This is the only Note field in C.A.T. where preset text may be entered. (See "Managing Activities" in chapter 3 for examples of preset text.)

ENTER To record activities in C.A.T., click the Enter button at the bottom of the window. Activities will appear in alphabetical order by class in the Activity List window.

CLEAR To clear the Activity window, click Clear. Note that Clear does not delete information, it clears the fields for new entries.

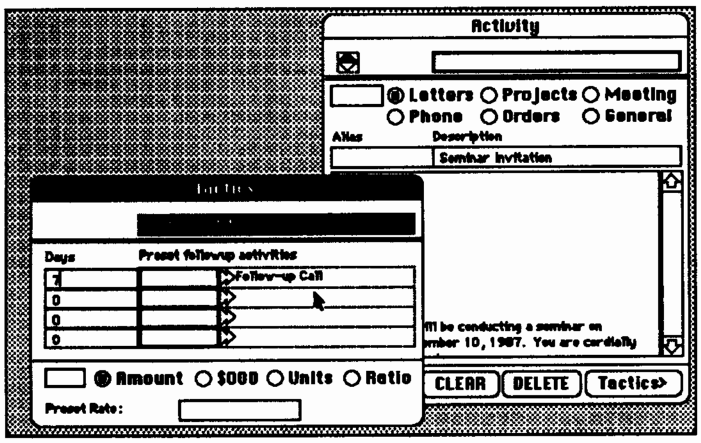
DELETE To delete an activity, display the record in the Activity window, then click the Delete button. C.A.T. will ask you to confirm the action. Click OK and the activity is deleted.

Tactics> Click the Tactics> button to display the Tactics window. Tactics allow you to set up routine preliminary or follow-up activities. (See the Tactics command described next.)

Tactics

Tactics are used to automate routine preliminary or follow-up activities. For example, a tactic could be set up so that every time you send out a letter (your primary activity), a follow-up call is automatically scheduled one week later (your follow-up tactic).

To set up tactics, first display the primary activity in the Activity window. Then click the Tactics button in the lower right corner of the window or choose the Tactics command from the Enter menu.



The primary activity is displayed at the top of the window, and there are fields to preset up to four tactics.

Days Field

Enter the interval between the primary activity and the tactic activity. Enter a positive number (i.e., "5") to indicate the number of days *after* the primary activity, enter a negative number (i.e, "-3") to indicate the number of days *prior* to the primary activity.

Tactics Field

To enter tactic activities, type the activity name or alias in the clairvoyant search fields and C.A.T. will display names that match in the echo field. Alternatively, you can click once on a Goto arrow and the Activity List window will appear. Click once to highlight the activity you want, then reactivate the Tactics window.

The four buttons below the tactics are used to designate what type of data will be captured in the Amount field of the Event window. These are used in reports to control formating and totaling.

Amount	**means "dollars and cents"**
$000	**means "thousands of dollars"**
Units	**means "quantity" (see "Preset Rates Field" below)**
Ratio	**means numbers and index ratios.**

Click to make your selection.

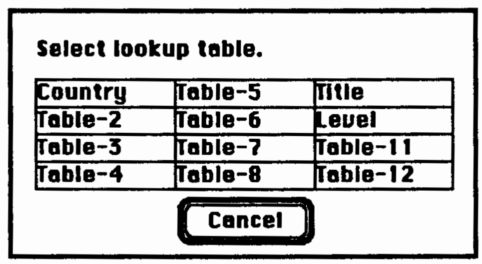
Preset Rates Field

If you select the Units option above, you can enter an amount per unit in the Preset Rate field. This feature allows you to manage time charges.

After you enter your tactics in the Tactics window, activate the Activity window, and click Enter.

Lookup Tables

Lookup tables are used to set up codes for categorizing your accounts and contacts. Codes can be any attribute that you want to use to categorize account or contact records.



When you choose the Lookup Table command from the Enter menu, a dialog box will appear.

Tables 1 through 8 are for accounts. Tables 9 through 12 are for contacts.

Table 1 has initially been assigned to country information. If you do not need to manage foreign contacts, rename this table for your own use.

Click to select any table and the Lookup Table window will appear:

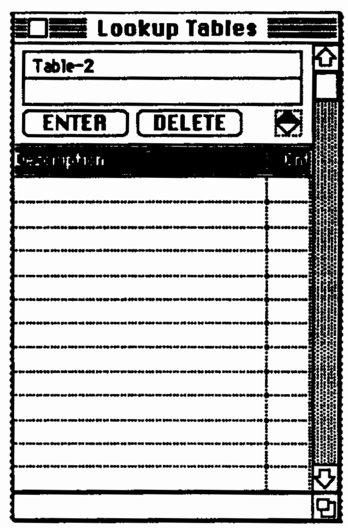


Table Name Field

Enter a title for the table in the first field at the top of the window. All references to the table in other windows will be updated to show this new title.

Code Field

ENTER

The second field from the top (under the Title) is for entering codes. Type in code descriptions and click Enter. Codes will be displayed in alphabetical order under the Description heading.

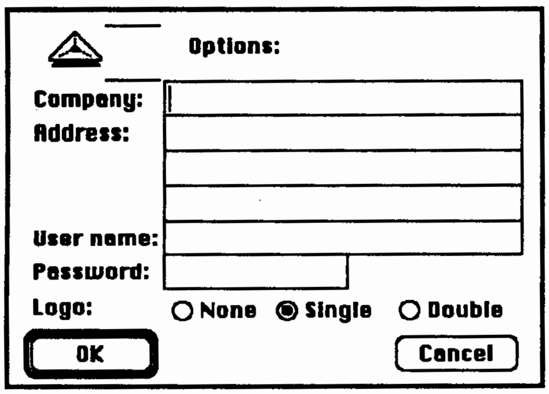
DELETE

To delete codes, display the lookup table that contains the code to be removed. Click once to highlight the code and it will appear in the entry field below the table title. Then click the Delete button.

To change codes, display the table that contains the code to be changed, in the Lookup Table window. Click once to highlight the code to be changed and it will appear in the entry field below the table title. Make your changes and click Enter. (The entry and use of codes is explained in chapter 3, "Managing Contacts.")

Options

When you choose Options from the Enter menu, the following dialog box will appear:



Name & Address

Enter your company name and address as you would like this information to appear at the top of reports.

Enter a user name. The name you enter here will (a) print at the top of reports above your company address and (b) appear at the end of letters created with the New Form Letter command.

User Password

Enter a password if you wish to use the Lock command to protect your database. In order to use Lock effectively, you must enter a system password as well. (See the Password command described next and the Lock command later in this chapter.)

Once passwords are entered, C.A.T. will prompt the user for a password every time (a) the Lock command is selected and (b) every time the file is loaded. Either the user and system passwords would be acceptable. Failure to enter a valid password causes C.A.T. to deny access to the file.

The user password permits data entry. However, the user cannot change activities. The system password, to facilitate system administrator control, permits complete access to all commands and data.

If you enter a password, *write it down*, and store it in a safe place. C.A.T. distinguishes uppercase and lowercase letters in passwords.

Logo

C.A.T. allows you to create your own logo which can be printed in the upper left corner of reports. Instructions for creating a logo are given in Appendix C.

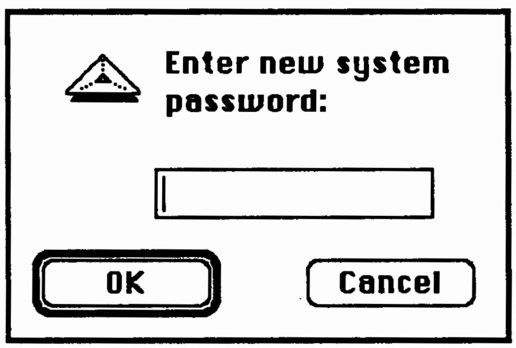
If you are printing a logo, click Single if it is 32 dots wide or click Double if it is 64 dots wide. If you are not using a logo, None is already set as the default. (See Chapter 4 for a sample report with a logo.)

After you make your entries, click OK.

Password

This command is used to enter a system password for use with the Lock command under the Action menu. Note that in order to use the Lock command effectively, you must enter a user password (under Options) as well.

When you choose Password from the Enter menu, the following dialog box will appear:



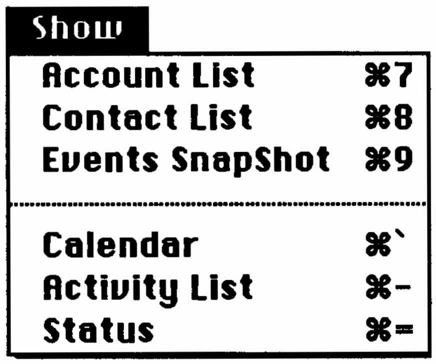
Passwords can be alphanumeric and up to eight characters long. Note that C.A.T. distinguishes uppercase and lowercase letters in passwords. After you enter a password, *write it down*, and store it in a safe place, then click OK.

Once passwords are entered, C.A.T. will prompt the user for a password every time the Lock command is selected and every time the current file is loaded. Either the user or system passwords would be acceptable. Failure to enter a valid password causes C.A.T. to deny access to the file.

(See the Lock command later in this chapter.)

Show Menu

There are six commands under the Show menu. These commands are used to display the following windows:

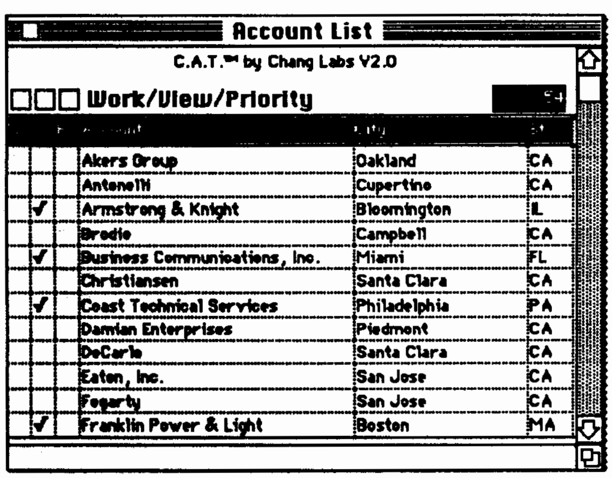


- Account List shows accounts by view.
- Contact List window shows contacts by account.
- Events Snapshot shows all events by contact, activity, and time.
- Calendar shows days by month.
- Activity List window shows all activities by class.
- Status window shows vital statistics about your C.A.T. database.

This section describes the contents and shows all the actions that can be performed using each list window.

Account List

The Account List window shows a list of accounts in alphabetical order. You can group accounts into views and display only the accounts in a particular view. You select a view by choosing it from the Views menu. When you choose Account List from the Show menu, the following window will appear:



Window Headings

For each account, the window shows the name, city, and state. The total number of accounts in the view is also shown.

The Account List window includes three columns on the left labeled **W**, **V**, and **P**. They are defined as follows:

W	Work	Accounts that are checked have been changed during the current session. The "current session" is the time spent since you last saved to disk. When you save to disk or quit, the check marks for the Work column are automatically cleared.
V	Current	Accounts that are checked belong to the currently selected view from the Views menu.
P	Priority	Checked account means the record has higher priority (as defined by you) than other accounts.

☐☐☐ Work/View/Priority

You can control which accounts are listed in the Account List window by checking the three boxes on the upper left. These boxes let you select to see:

- Work accounts only,
- Current view accounts only,
- Priority accounts only, or
- Any combination of the three.

To change the status of any box, click to check or uncheck the three boxes.

Checking (√) Accounts

You can add or remove check marks (√). To check any account column(s) to the left of the account name, point and click.

To remove a check mark, point to the check mark and click.

Highlighting Accounts

To select an account, click on the account name, city, or state to highlight the account.

Zooming to Contacts

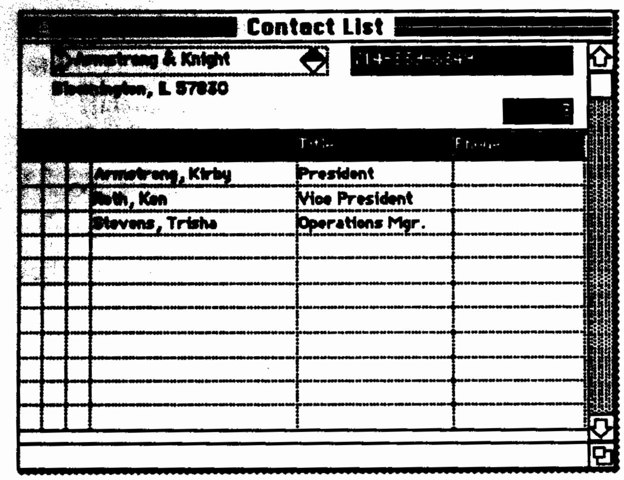
To open the window displaying the contacts for the highlighted account, click once on the highlighted account. The Contact List window will appear with the names of all contacts for the current account.

Zooming to Entry Window

Zoom to the Account window for the highlighted account, double-click on the highlighted record. The Account window will appear with the selected record displayed. You can make changes and click Enter as needed.

Contact List

The Contact List window shows the names of all contacts for the current account. When you select Contact List from the Show menu, C.A.T. displays the following window:



Window Headings

At the top are listed the current account's name, city, state, zip code, phone number, and the number of contacts. Then each contact's name, title, and extension are listed.

Current Account

You select the account for the Contact List (i.e., make it the "current account") using one of three methods.

- Click on the Goto arrow by the account name and the Account List will appear; click to highlight the account you want; then activate the Contact List.
- Double-click on the Goto arrow by the account name and the Account window will appear; use the clairvoyant search field to type the account name and have C.A.T. find the account; then activate the Contact List.
- Click the Next button to scroll through the current list of accounts.

The Contact List window also includes three columns on the left labeled **W**, **V**, and **P**. They are defined as follows:

W	Work	Contacts that are checked have been changed during the current session. The "current session" is the time spent since you last saved to disk. When you save to disk or quit, the check marks for the Work column are automatically cleared.
V	Current	Contacts that are checked belong to the currently selected view from the Views menu.
P	Priority	Checked contact means the record has higher priority (as defined by you) than others.

Checking (√) Contacts

You can add or remove check marks (√). To add a check mark click beside the name in the first three columns.

To remove a check mark, point to the check mark and click.

Highlighting A Contact

To select a contact record, click on the name, title, or extension columns to highlight the record.

Zooming to Events

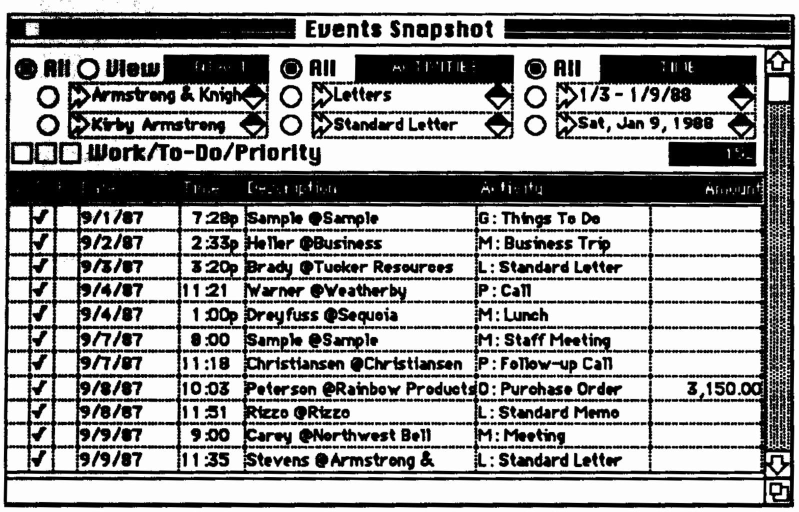
To open the window displaying the events for the highlighted contact, click once on the highlighted contact. The Events Snapshot window will appear with all the events for the current contact.

Zooming to Entry Window

To zoom to the Contact window for the highlighted contact, double-click on the highlighted record. The Contact window will appear with the selected record displayed. You can make changes and click Enter as needed.

Events Snapshot

The Events Snapshot window shows a list of the events from your C.A.T database. When you select Events Snapshot from the Show menu, the following window is opened:



Window Headings

At the top, Events Snapshot has radio buttons, Goto arrows, Next buttons, and check boxes that are used to select the events to be listed. For each event, the window shows the date, time, contact, activity, and amount.

You control the events you wish to see by selecting buttons. Events Snapshot has four sets of buttons that you can set:

Contacts	**All, by view, an account, or one contact.**
Activities	**All, by class, or an activity.**
Time	**All, by range, or a specific date.**
To do	**Work, to do, priority or any combination.**

For contacts, you can select events for all accounts, accounts in the current view, a specific account, or for one contact. Click the radio button to make your choice.

You select the current view by choosing a view from the Views menu.

You select the account to show using one of three methods.

- Click on the Goto arrow by the account name and the Account List will appear; click to highlight the account you want; then activate the Events Snapshot.
- Double-click on the Goto arrow by the account name and the Account window will appear; use the clairvoyant search field to type the account name and have C.A.T. find the account; then activate the Events Snapshot.
- Click the Next button to scroll through the current list of accounts.

You select the contact to show using one of three methods.

- Click on the Goto arrow by the contact name and the Contact List will appear; click to highlight the contact you want; then activate the Events Snapshot.
- Double-click on the Goto arrow by the contact name and the Contact window will appear; use the clairvoyant search field to type the contact name and have C.A.T. find the contact; then activate the Events Snapshot.
- Click the Next button to scroll through the current list of contacts.

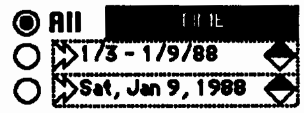
For activities, you can select events for all activities, a class of activities, or one activity. Click the radio button to make your choice. *(Note that if the Active Only check box is checked on the Activity List, then only Active activities are shown.)*

You select the class of activity to show using one of two methods.

- Click on the Goto arrow by the class name and the Activity List will appear; click a radio button to select the class of activity; then activate the Events Snapshot.
- Click the Next button to scroll through the activity classes.

You select the activity to show using one of three methods.

- Click on the Goto arrow by the activity name and the Activity List will appear; click to highlight the activity you want; then activate the Events Snapshot.
- Double-click on the Goto arrow by the activity name and the Activity window will appear; use the clairvoyant search field to type the activity name and have C.A.T. find the activity; then activate the Events Snapshot.
- Click the Next button to scroll through the current list of activities.



For time periods, you can select events for all time periods, a date range, or one day. Click the radio button to make your choice.

You select the date range using one of three methods.

- Click on the Goto arrow by the date range, and the Calendar will appear; click to select a week or double-click to select a month, and the Events Snapshot window will appear.
- Double-click on the Goto arrow by the date range, and a range dialog will appear; enter the begin and end dates; click OK and the Events Snapshot window will show the specific date range.
- Click the Next button to scroll through the next date range.

You select the date to show using one of two methods.

- Click on the Goto arrow by the date and the Calendar will appear; double-click to select a date and the Events Snapshot will appear.
- Click the Next button to scroll to the next date.

☐☐☐ Work/To-Do/Priority

The Events Snapshot window includes three columns on the left which show the status of events. They are:

W	Work	Events that are checked have been changed during the current session. The "current session" is the time spent since you last saved to disk. When you save to disk or quit, the check marks for the Work column are automatically cleared.
T	To-Do	Events that are checked mean that the item needs attention (as defined by you).
P	Priority	Checked events mean that this event has higher priority (again, as defined by you) than other events.

To see just events with a specific status, check and uncheck any combinations of the work, to-do, and priority check boxes above those columns by pointing and clicking on the boxes.

Checking (√) Events

You can add or remove check marks (√). To add a check mark click beside the event in the first three columns.

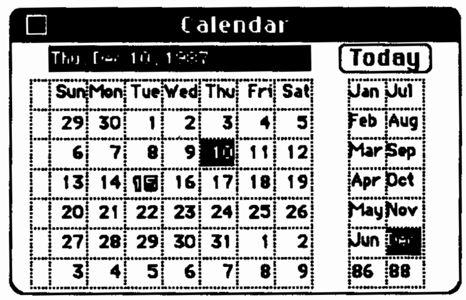
To remove a check mark, point to the check mark and click.

Highlighting Events To select an event record, click on the date, time, contact, activity, or amount columns to highlight the record.

Zooming to Event Window To activate the Event window for the highlighted event, click on the highlighted event. The Event window will appear with all the data for the current event. You can make changes and click Enter as needed.

Calendar

The Calendar shows a month at a time -- any month of any given year.



Selecting a Day When you choose Calendar from the Show menu, this window will appear.

The field at the top of the window displays the date currently selected; below, the day is highlighted. Click on any day and it will appear as the current date. Note that this date will automatically be used in the Event window when you enter new events.

Click the Today button to set the Calendar to your Macintosh system date. The system date is displayed in outline style, no matter what date is highlighted.

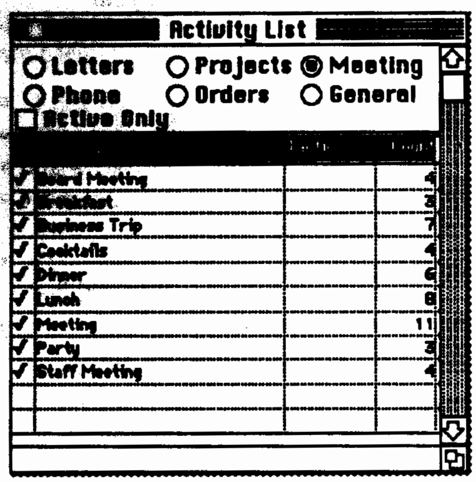
Selecting a Month To change the month, click on any month shown on the right; the Calendar will display it.

Selecting a Year The year selected is the one between the two years displayed on the bottom right. To change the year, click one of the boxes. Click the right box to move forward one year. Click the left box to move backwards one year.

Zooming to Events To see the events for any day or month, click on the highlighted box. To see events for a week, click on the left-most column next to the week. The Events Snapshot window will appear with the events for your selection.

Activity List

The Activity List window shows the names of activities in your C.A.T. database. When you choose Activity List from the Show menu, the following window will appear:



Window Headings

Activities are listed alphabetically by class. To select the class of activities, click one of the radio buttons across the top.

For each activity, Activity List shows a description, tactic, and number of events for this activity.

☐ Active Only

On the left is a single column that shows the status of activities. All activities are automatically designated as "Active" by a check mark. You can mark activities as inactive and choose to see the "Active Only" ones by checking the box above the column.

Note that inactive activities are not deleted from C.A.T. When you select Active Only, C.A.T. hides all inactive activities and the linked events from view.

Checking (√) Activities

To check an record as active, point to the first column next to the activity name and click. To remove a check mark, point to the check mark and click.

Highlighting Activities

To select an activity, point and click on the activity, tactic, or count columns. The selected record is highlighted.

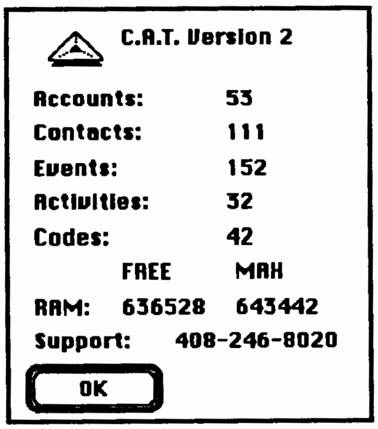
Zooming to Events

To see all the events for this activity, click again on the highlighted activity. The Events Snapshot window will appear with the events for the current activity.

Zooming to Entry Window To change an Activity record, double-click on the highlighted activity. The Activity window will appear with your selection displayed. You can make changes and click Enter as needed.

Status

The Status window shows statistics about the records in your C.A.T. database. When you choose Status from the Show menu, the following dialog box will appear:



The total number of accounts, contacts, events, activities and codes entered in your database to date are shown.

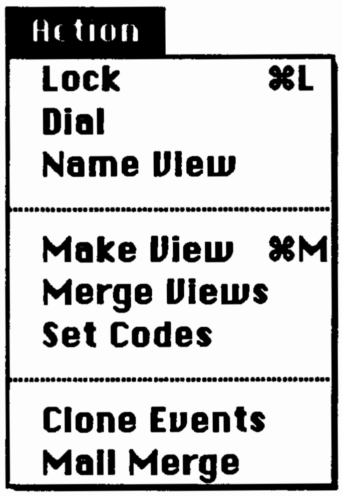
You can also see how much memory is available:

- Free RAM is the space available including notes.
- Max RAM is the space available without notes.

Action Menu

There are eight commands under the Action Menu. These commands are used to:

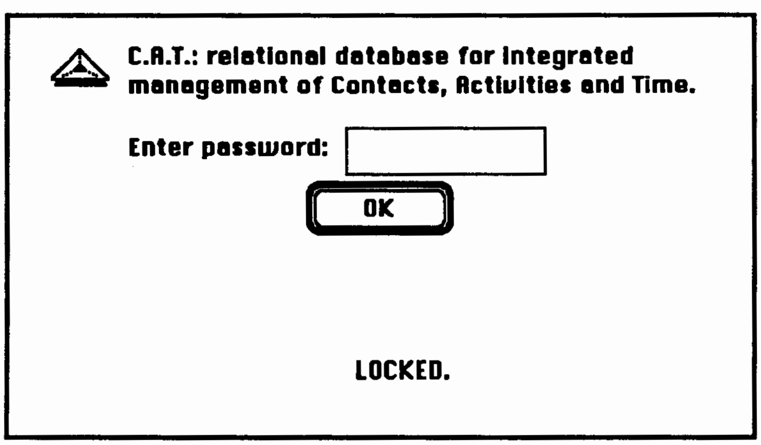
- Lock your data;
- Dial the current phone number;
- Name views;
- Group accounts by making views;
- Combine and extract accounts by merging views;
- Assign codes to multiple accounts or contacts at one time;
- Record an event for multiple contacts at one time;
- Create letters for multiple contacts at one time.



Lock

Lock is used to protect your database from unauthorized use. This command allows you to step away from your Macintosh temporarily without exiting C.A.T.

First enter a user password using the Options command and a system password using the Password command. Both commands are on the Enter menu. Then choose the Lock command from the Action menu. The following dialog box will appear:



This box will remain on-screen until a valid User Password or System Password is entered. Enter your password and click OK.

If you enter only the user password, you may enter data; but you may not change activities and lookup codes; a system password permits full access to all commands and data.

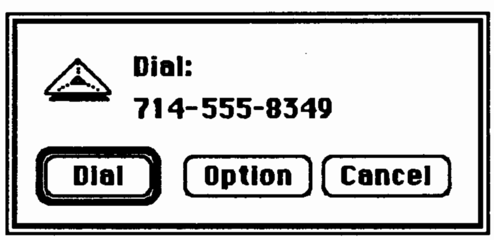
Note that after you set up passwords, the Lock dialog box will appear whenever you load the current file. If you fail to enter a valid password after three attempts, you will be returned to the Finder.

Dial

Dial is used to automatically dial the phone number for the current record displayed in the active window.

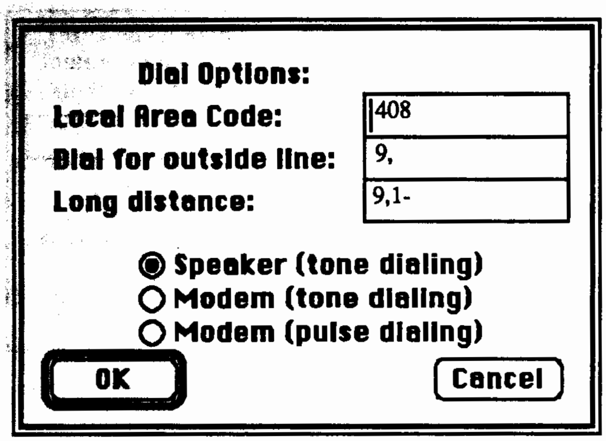
- If the Event or Events Snapshot window is active, C.A.T. will dial the phone number for the linked contact.
- If the Contact or Contact List window is active, C.A.T. will dial the number in the extension field if it is six or more digits long. If that field has fewer than six digits, C.A.T. will dial the number for the account.
- If the Account or Account List window is active, C.A.T. will dial the phone number for the account.

When you choose Dial from the Action menu, the following dialog box will appear:



Dial Options

The first time you use Dial, click Option to set the dialer options. When you click Option, C.A.T. will show the following dialog:



The information you enter into the three boxes is used as follows:

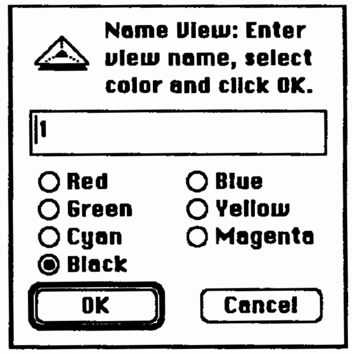
• Local area code	If the number you wish to dial has the same local area code as the code supplied here, C.A.T. will skip the code when dialing. Further, C.A.T. will not prefix the number with the long distance data below.
• Outside line	If you need to dial specific digits to access an outside line, enter the digit(s) in this box. C.A.T. will automatically dial for the outside line first.
• Long distance line	If you have a special code that you dial to access a long distance line, enter the code here. Include the digits needed to access an outside line.

Dial offers three methods to dial. The Speaker option uses the Macintosh to generate tones. On some phones, the tones can substitute for your pressing or dialing numbers on the phone. The Tone and Pulse options use the dialing capabilities of modem accessories to dial phone numbers. (Consult your modem manual for more information.) Select an option and click OK.

Name View

This command is used to assign or change the name of a view.

First select a view from the Views menu, then choose Name View from the Action menu. A dialog box will appear.



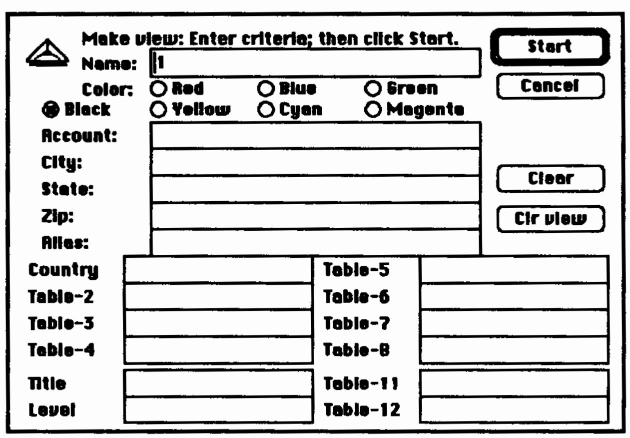
Enter or change the title in the space provided and click OK. The title will appear in the Views menu and in the Account List window when that view is selected.

If you have a color monitor, you can optionally set the color for the view by clicking one of the choices supplied. Records in this view will be displayed in color.

Make View

Make View creates views of your accounts or contacts by matching your C.A.T. data against search criteria such as partial city, state, and zip code data. Make View searches for all accounts and contacts that satisfy your criteria and displays them in the Account List as a new view. (For examples of using Make View, see "Managing Contacts" in chapter 3.)

To make a view, select one of the views from the Views menu, then choose Make View from the Action menu and the following dialog box will appear:



Title Field

At the top of the window, enter the name of the view. This name will replace the name in the Views menu.

Color Buttons

If you are using a color monitor, select a color. Each account in the view will be displayed in this color.

Search Criteria

Enter your search criteria in the appropriate fields. In the middle of the box, you can enter account name, city, state, zip, and alias information from your account records.

In the lower half of the box, you can enter codes from any of your lookup tables for accounts and contacts.

You can use the following logic operators and modifiers:

Operator	Example	Meaning
(text only)	ABC	Starts with the letters 'ABC'
=	=ABC	Exactly to 'ABC", note spaces
>	>ABC	Greater than 'ABC'
<	<ABC	Less than 'ABC'
>=	>=ABC	Greater than or equal to 'ABC'
<=	<=ABC	Less than or equal to 'ABC'
?	?ABC	Contains the letters 'ABC'
..	ABC..XYZ	Range from 'ABC' to 'XYZ'

C.A.T. interprets blank fields to mean that no selection criterion is specified and all accounts and contacts should be included.

To find all records that have no values in a particular field, for example, all records that are missing zip codes, enter the "=" operator only in the field.

Modifier	Example	Meaning
|	A|B|C	'A' or 'B' or 'C' all pass the selection criteria.
	A|>N|?X	Starts with 'A' or greater than 'N' or contains 'X'
/	/ABC	Does not start with 'ABC'
	/>ABC	Not greater than 'ABC'

(For more information on the use of these operators and modifiers, see 'Managing Contacts' in Chapter 3.)

After you enter your criteria, click the Start button to begin the selection process. C.A.T. will find all of the accounts and contacts that match your criteria and display them in Account List.

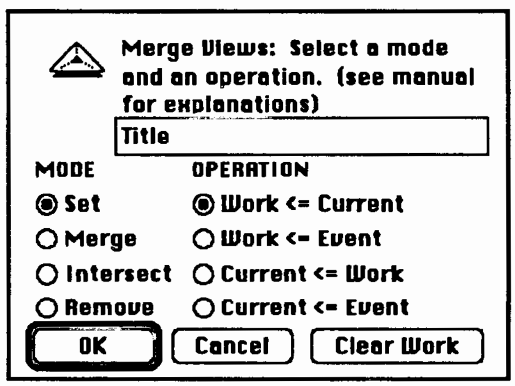
Click the Clear button to clear all of the fields in the Make View dialog box for new entries. Note that Clear does not delete any criteria previously saved.

Click the Clr view button to clear all accounts and contacts from the selected view. This allows you to create a new view by manually checking records in the Account List window.

Merge Views

Merge Views is used to work with more than one view at a time. This command helps you combine, extract, compare, or eliminate accounts and contacts from various views.

When you choose Merge Views from the Action menu, the following dialog box will appear:



If you are using the "Current <= Work" or "Current <= Event" operations, enter a title for the view to be created. The title will appear in the Views menu and in the title bar of the Account List window when the view is selected.

Click to select a mode and an operation. The Mode controls how two views will be combined:

Mode	Explanation
Set	Replace one view with another.
Merge	Merge one view with another to create combined view.
Intersect	Intersect to find common members of two views.
Remove	Remove common members of one view from another.

The Operation tells C.A.T. which views to use:

Operation	Meaning
Work	The Work view is a transient view. Each member of the view has a check mark in the Work column of the Account List and Contact List windows. Normally, the Work view is used to accumulate all new records and records that have changed during the current session.
Current	The Current view is the last view selected from the Views menu. Each member of this view has a check mark in the View column of the Account List and Contact List windows. You can click the Cancel button in the Merge View dialog box to return to the main screen and select a different view, if needed.
Event	The Event view is the list of events currently displayed in the Events Snapshot window.

The view to the left of the "<=" symbol is the view that will be created as a result of the merge.

After you make your selections in the dialog box, click OK. When the merge is complete, a dialog box will appear showing the number of accounts in the new view. Click or press any key to continue.

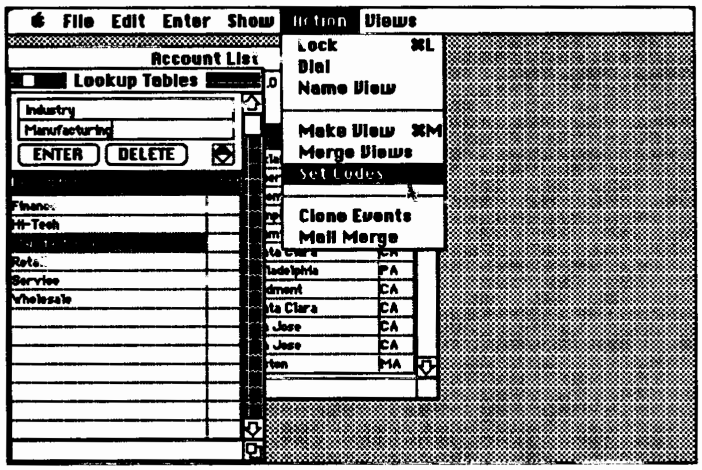
If you wish to clear all of the accounts in the Work view, click the Clear Work button in the Merge Views dialog box. C.A.T. will ask you to confirm the action. Click as appropriate.

Set Codes

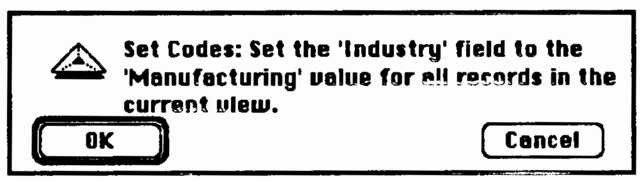
Set Codes is used to assign codes to more than one account or contact at a time. This command allows you to enter a code for every account or contact in the current view.

First, display the view to which the codes will be set, in the Account List window.

Next, display the lookup table which contains the code you want. Click once to highlight the code, then choose the Set Codes command from the Action menu as shown below:



C.A.T. will ask you to confirm the action:



Click OK and the code will be linked for every account or contact in the view. (See "Managing Contacts" in chapter 3 for more examples of lookup tables and codes.)

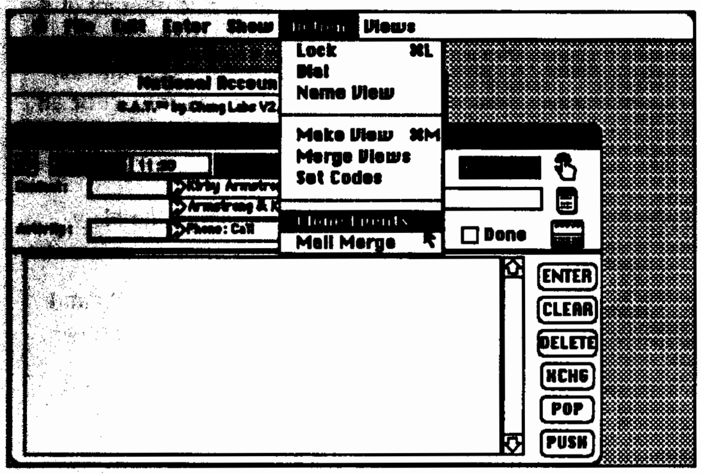
Clone Events

Clone Events is used to create an event for more than one contact at a time. You can create an event record for every contact in the view currently displayed in the Account List window.

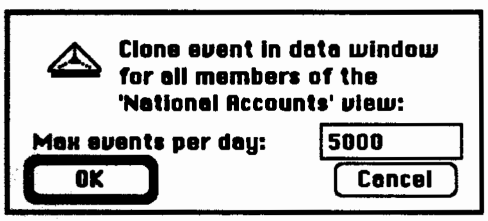
First display the view of accounts and contacts to which this event should be cloned, in the Account List window.

Then create the event to be cloned by choosing any event record and displaying it in the Event window.

Next, choose Clone Events from the Action menu:



The following dialog box will appear:



Max events per day lets you set the daily limit of how many events you can handle. For example, if you have cloned 50 events that require follow-up calls but you can only make 10 phone calls a day, enter "10" in the field shown above and C.A.T. will schedule 10 calls per day over a period of five work days for you. C.A.T. even recognizes weekends so that no events will be scheduled on Saturdays or Sundays. However, it does not know your holidays.

Click OK and a dialog box will appear showing the number of events created for all of the contacts (in the accounts) displayed in the current View. Click or press any key to return to the main screen.

Mail Merge

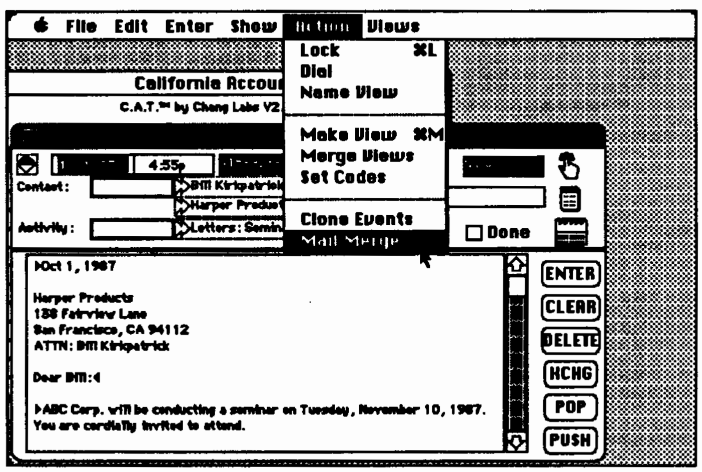
Mail Merge is used to create letters for more than one contact at a time. This command allows you to create a form-letter event for every contact in the view currently displayed in the Account List window. Then you can print all of the letters at one time. (For an annotated example of creating, preparing, and printing form letters, see chapter 3, "Managing Activities.")

Note that you must first create the letter activity using the New Form Letter command.

Display or create the view which includes all of the accounts and contacts who will receive the letter, in the Account List window.

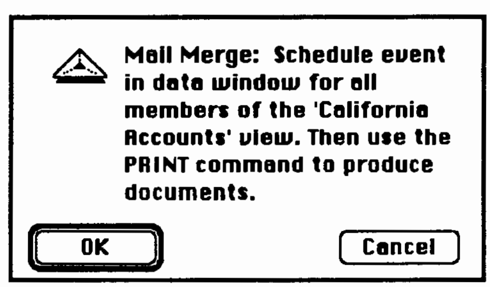
Next create or display an event record in the Event window that shows the letter you wish to send for one member of the view.

Then select the Mail Merge command from the Action menu as shown in the following screen:



A dialog box similar to the following will appear:

Click OK to confirm the action.



Appendices

Appendices

Appendix A: Import/Export

C.A.T. is designed for sharing information. You can import or export data from or to spreadsheets, word processors, another C.A.T. user, or other databases. C.A.T. provides the support needed by corporate users for merging and sharing of data among users and applications.

You use the Run Macro command to import and the Copy Records command to export data.

Import Data

Users can import data from DOS databases such as PFS File, Lotus 1-2-3, Q & A, Microsoft File, and dBase III Plus.

In the realm of Macintosh software, names, addresses and other information have been transferred to C.A.T. successfully from FileMaker Plus, OverVue, More, Omnis 3, Excel, Microsoft Works, and HyperCard.

Data from IBM mainframes and Tandem computers, among others, have also been imported to C.A.T.

Via Excel

C.A.T. uses the import capabilities of Microsoft Excel to manipulate data. Once data is imported into Excel, a simple copy and paste moves data into C.A.T. As a result, C.A.T. imports data from any computer or application that supports the data requirements of the industry standard Excel spreadsheet.

The following is a step-by-step procedure to import data into C.A.T.

Creating a Text File

If your data is in FileMaker Plus, create a text file that Excel can load as follows:

1. **Choose Output To from the File menu**
2. **Name the output file.**
3. **Click New.**
4. **Select the desired data fields in the Field List and Move them into the Output Order column. You will be asked if you wish to include or exclude calculation fields.**
5. **Click Include.**
6. **Select the Text button.**
7. **Select the Unformatted Values button.**
8. **Click Output.**

FileMaker Plus will create a Text file and save it to your disk.

Loading Into Excel

9. **In Excel, open the Text file you created in FileMaker Plus.**
10. **Choose Save As from the File menu.**
11. **Click Normal.**
12. **Click Save.**

Microsoft Excel will create a Normal file and save it to your disk. Your file is now ready for the cut-and-paste operations described below.

Similarly, text files can be created for Excel from various Macintosh database products such as More, OverVue, MicroSoft File, 4th Dimension, Omnis 3, HyperCard, and MicroSoft Works.

DOS Comma -delimited Files

Unlike Macintosh Normal and Text spreadsheet files which use a Tab to separate fields and a Return to separate records, IBM DOS spreadsheet files use commas to separate fields and a Return to separate records.

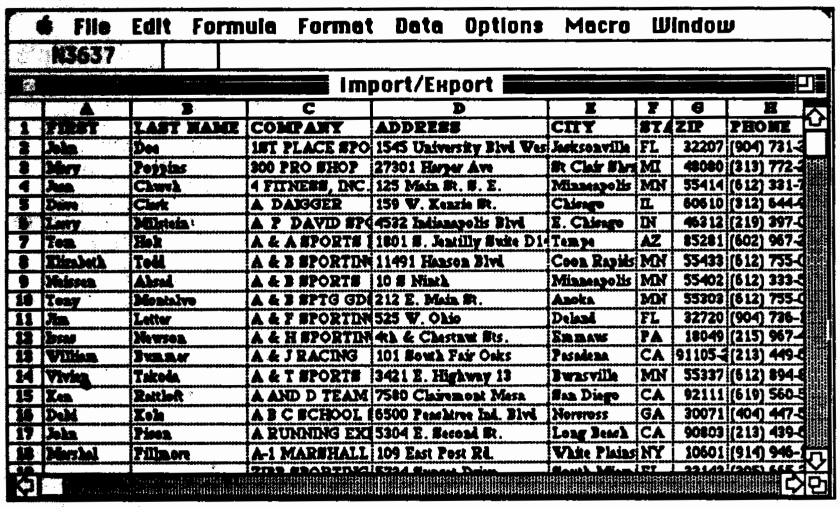
Therefore, if you are transferring files from an DOS format to the Macintosh, save your file as a comma-delimited file. Then through a utility such as TOPS, Dayna file, or a file server that allows DOS and the Macintosh to share data, load the file into the Macintosh spreadsheet using the Open command.

Preparing Your Data

Once your data is in a spreadsheet, you must arrange the data fields to match the predefined data field formats of C.A.T. Start by importing account records into C.A.T. (e.g., contact, company, address, city, state, zip, phone, account number, notes).

To do this, you must arrange your spreadsheet data field columns so that they correspond to the data fields structure in C.A.T.'s Account window. If your data includes only one contact per account, this will be the only spreadsheet you will have to import into C.A.T.

The following is a sample Excel spreadsheet with account information. Note that the first name and last names are in two columns. You can use Excel to create a single field out of two.


File Edit Formula Format Data Options Macro Window

N3637

Import/Export

	A	B	C	D	E	F	G	H
1	FIRST	LAST NAME	COMPANY	ADDRESS	CITY	STA	ZIP	PHONE
2	John	Doe	1ST PLACE SPO	1545 University Blvd Wes	Jacksonville	FL	32207	(904) 731-
3	Mary	Poppins	300 PRO SHOP	27301 Harper Ave	St Clair Shr	MI	48080	(313) 772-
4	Jean	Church	4 FITNESS, INC.	125 Main St. S. E.	Minneapolis	MN	55414	(612) 331-
5	Dave	Clark	A DAGGER	159 W. Kenzie St.	Chicago	IL	60610	(312) 644-
6	Larry	Milstein	A P DAVID SP	4532 Indianapolis Blvd	E. Chicago	IN	46312	(219) 397-
7	Tom	Holt	A & A SPORTS	1801 S. Jentilly Suite D1	Tempe	AZ	85281	(602) 967-
8	Elizabeth	Todd	A & B SPORTIN	11491 Hanson Blvd	Coon Rapids	MN	55433	(612) 755-
9	Melissa	Ahsad	A & B SPORTS	10 S Ninth	Minneapolis	MN	55402	(612) 333-
10	Tony	Montalvo	A & B SPTG GD	212 E. Main St.	Anoka	MN	55303	(612) 755-
11	Jim	Letter	A & F SPORTIN	525 W. Ohio	Deland	FL	32720	(904) 736-
12	Isaac	Newson	A & H SPORTIN	4th & Chestnut Sts.	Emmaus	PA	18049	(215) 967-
13	William	Bummer	A & J RACING	101 South Fair Oaks	Pasadena	CA	91105-	(213) 449-
14	Vivian	Takeda	A & T SPORTS	3421 E. Highway 13	Burnsville	MN	55337	(612) 894-
15	Ken	Rattloft	A AND D TEAM	7580 Clairemont Mesa	San Diego	CA	92111	(619) 560-
16	Dahl	Kohn	A B C SCHOOL	6500 Peachtree Ind. Blvd	Norcross	GA	30071	(404) 447-
17	John	Pison	A RUNNING EX	5304 E. Second St.	Long Beach	CA	90803	(213) 439-
18	Marshal	Fillmore	A-1 MARSHALL	109 East Post Rd.	White Plains	NY	10601	(914) 946-

The object of this exercise is to make the number and order of the data fields in the spreadsheet exactly match those of C.A.T. Therefore, you may have to move, add, or delete columns (e.g., add an Alias column to match the C.A.T. field) in order to make your spreadsheet column structure match C.A.T.'s data field structure.

At this point, you should review and clean up your data, removing duplicates, standardizing spelling, etc.

You may leave individual data cells empty if there is no information.

You must leave empty columns on the spreadsheet as required to match C.A.T.'s data field structure. For example, if you do not have phone numbers, you still need to reserve a column for phone numbers.

Don't worry about the amount of data in your fields at this time. C.A.T. may have to clip off excessive data in a few fields, but you will find it easier to identify and edit such shortened fields in C.A.T. than in the application in which the data was created.

Using A Spreadsheet

In the spreadsheet, you can use the Delete command to delete a column, the Cut and Paste commands to move a column, or the Insert command to add a column.

You can use the & operator to combine two columns into one. For example, if you stored the first name in column A and the last name in column B, you can combine the fields using the following formula for the first row:

=A1&" "&B1

You can also use Excel formulas to break one column into multiple columns of data. For example, if you had entered the city, state and zip code as one line in cell A1:

San Jose, CA 95129-1088

You should use the following functions to split the information into separate columns.

cell B1 contains:	=SEARCH(",",A1,1)	find the comma
cell C1 contains:	=SEARCH(",",A1, B1+2)	find the 2nd space following the comma.
cell CITY:	=MID(A1,1,B1-1)	extract city
cell STATE:	=MID(A1,B1+2,C1-B1-2)	extract state
cell ZIP:	=MID(A1,C1+1,LEN(A1)-C1)	extract zip

When you have finished arranging the spreadsheet columns to match C.A.T.'s account record, your spreadsheet should havenine columns **(Contact— Company — Address —City – State — Zip Code — Phone Number — Alias — Comments/Notes).**

When you have finished arranging the spreadsheet columns to match C.A.T.'s Contact Record, your spreadsheet should have eleven columns **(Contact — Company — Title — Lookup Table 10 -- Lookup Table 11 -- Lookup Table 12 -- Mr./Mrs./Ms. — Extension — Alias -- Mail Stop Number — Comments/Notes).**

Finally, you need to create a final data field column to tell C.A.T. to enter the data in each row automatically:

{Enter Button}

- **Find the last vacant column in the spreadsheet, (the 10th column if you're entering Account records, or the 12th column if you're entering Contact records.**
- **In the top data cell of this column, type: {Enter}**

  Note that brackets { } must be used.
- **Place your cursor on this top data cell and select all the cells down to the level of your last record in the spreadsheet. You may simply scroll down to the desired level or use the elevator/shift/click method of selecting.**

  Do not simply select the entire column in the spreadsheet. You may get an "Out Of Memory" message.
- **Choose Fill Down from the Edit menu.**

The contents of the top cell will be replicated in each selected cell below it in the column.

Copy Cells

To move your spreadsheet data into C.A.T., you must first select the rows of data you wish to move and Copy them into the Clipboard. The Clipboard can handle approximately 200 records with comments/notes or about 300 records without. If your data files exceed these limits, you can simply copy the maximum number of records the Clipboard will take and after you finish loading them into C.A.T., jot down the number of records that have actually been entered. This will tell you if and where you need to start your next copy cycle from the spreadsheet.

Note: Do not attempt to Copy your spreadsheet to the Clipboard if your Macintosh is a message center for networking software such as InBox. You may not be able to copy to the Clipboard with the message center running. Other memory intensive applications may pose similar problems.

When your spreadsheet files can be copied into the Clipboard, you are ready to import your data into C.A.T.

1. **Select the desired data cells in the spreadsheet. You may simply scroll down to the desired level or use the shift/click method of selecting.**

   Note: Do not simply select the entire spreadsheet. That is, do not include all rows and all columns in your selection. You may get an "Out Of Memory" message. Select only data cells.

2. **Choose Copy from the Edit menu.**

   Your spreadsheet data is now entered into the Clipboard.

3. **Choose Quit from the File menu.**

   You will be offered a choice of saving formatted or unformatted values.

4. **Click Save Unformatted Values and click OK.**

   You will be returned to the Macintosh desktop.

5. **Load C.A.T.**

   If you are importing Account records, choose New Account from the Enter menu.

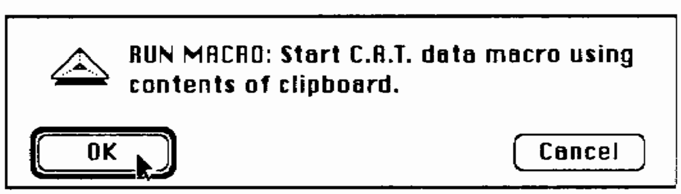
   If you are importing Contact records, choose New Contact from the Enter menu.

   Depending on your selection, the Account window or Contact window appears. Make sure that the cursor appears in the Contact field of the Account window or in the Name field of the Contact window. Click in these fields, if needed.

Run Macro

6. **Choose Run Macro from the Edit menu.**

   You will be asked to verify that you want C.A.T. to enter the contents of the Clipboard.



7. **Click OK.**

Run Macro will enter each record from the clipboard. Each record will appear momentarily in the window as it is automatically entered. If a given data field is too long, you will be asked to allow C.A.T. to clip it to the appropriate length. If this happens, click once to continue.

If you need to cancel Run Macro, click the mouse.

Note: Do not Save your data until you are sure where Run Macro stopped. Before you Save, open the Account List or Contact List window from the Show menu and jot down the number of records entered in the database. This will tell you if and where you need to start your next Copy and Run Macro cycle from the spreadsheet. This number appears in the Account List window in the upper right hand corner, and in the Contact List window in the upper right hand corner below the Phone Number box. It is helpful to remember that C.A.T. works with only one central database which you later divide into different "views." Therefore, successive data importation cycles will simply add data to the central database rather than creating new individual databases with different names.

8. **If the imported data is the start of a new database, choose "Save As..." from the File menu, enter a name for your database, and click Save.**

   If this is not your first data importation cycle:, choose Save from the File menu.

9. **Exit C.A.T. by choosing Quit from the File menu.**

Export Data

You use the Copy Records command under the Edit menu to export records from C.A.T. to other applications. You can use Copy Records to pass to the clipboard:

- a single record,
- an entire view,
- all entries in an Events Snapshot window,
- a set of related records, or
- any combination of these records.

From the clipboard, the records can be sent to:

- another C.A.T. database,
- a spreadsheet,
- a word-processing program, or
- any application that accepts tab-delimited files.

Selecting Records

To use Copy Records, select the records to copy using any list window. For example, if you want to copy a single account, activate the Account List. Then click to highlight the account to copy and select Copy Records from the Edit menu.

If you want to copy all events from Events Snapshot, activate Events Snapshot; identify and display only the events you want; (make sure no single event is highlighted by clicking a blank row if necessary); and choose Copy Records.

Choosing Options

Depending on which window is active, Copy Records displays a dialog of options. The options might include:

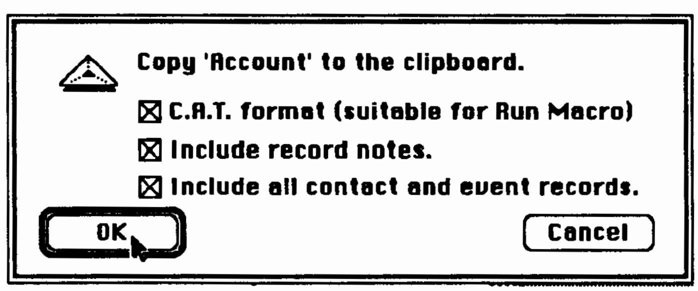
- Use the C.A.T. format and insert commands in the data that tell the Run Macro command which window to use for which records. If you do not choose this option, records are copied using the tab-delimited format of a spreadsheet.
- Include record notes with the data copied.
- Include linked records with the record to be copied. For example, if an account is selected, you can choose to pass all contact and event records as well.
- Pass notes only, in the word-processing format.

Click to select the options you need and click OK. The data is copied to the clipboard and ready for import into another product.

C.A.T. to C.A.T.

For example, to send information from one C.A.T. database to another:

- Display the list of accounts to be copied in the Account List window. You can select a View showing the accounts you want to transfer.
- Choose Copy Records from the Edit menu. The following dialog box will appear:



- Select the C.A.T. format option. This option transfers your data in a format that will allow it to be imported into another C.A.T. file by using the Run Macro command. Select the options to include notes, contact, and event records if you wish. Click OK.

Your file is now on the Clipboard. If you are transferring files via electronic media, you can first paste the Clipboard contents in a memo sheet. Send the memo sheet across the wire. At the receiving end, copy and paste the records onto the Clipboard and use Run Macro to get the records into the receiving C.A.T. as follows:

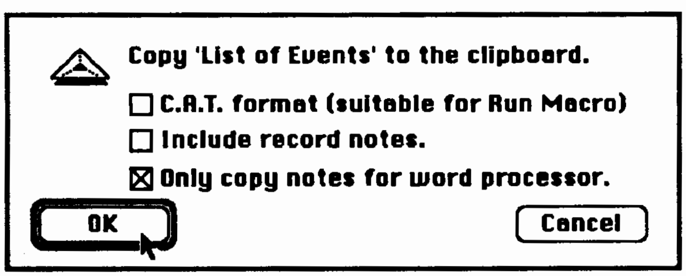
- Open the C.A.T. database to which the records will be copied. Click once to highlight its name in the Open command dialog box, then click Open.
- Choose Run Macro from the Edit menu.
- C.A.T. will ask you to confirm the action. Click OK.

The names, addresses, notes, etc. will be copied into the receiving C.A.T. database very rapidly. It takes approximately 15-20 minutes to do 200 records.

C.A.T. to Word Processor

From the Events Snapshot window, you also have the option of copying only your notes into a word-processing application:

- Display the events to be copied in the Events Snapshot window.
- Choose the Copy Records command from the Edit menu. Select the "Only copy notes..." option and click OK.



- Choose Quit from the File menu.
- Load the word-processing application and choose Paste from the Edit menu.
- Make your changes and print with your favorite word processor.

C.A.T. to Spreadsheet

Using the same instructions, you can copy any data from C.A.T. to a spreadsheet:

- Display the records to copy in a list window.
- Choose Copy Records from the Edit menu. Uncheck the "C.A.T. format..." option and click OK.
- Choose Quit from the File menu.
- Load the spreadsheet application and choose Paste from the Edit menu.

The records are copied to the spreadsheet. Each row shows one record and each column shows one field.

Sharing Data

C.A.T. makes it easy to share data. The Copy Records and Run Macro commands make sending and receiving records as easy as "copy and paste."

Special features in C.A.T. automatically insert preprogrammed commands that tell the receiving C.A.T. database to place all the relational records in the right place and establish the proper links among records.

This sharing feature is very useful for people who work in a group or in departments that support common clients. While each person could be working with various contacts, they can pass files back and forth so that all the efforts are synchronized.

Sales Management

Consider how the import and export features in C.A.T. can be applied to a decentralized sales operation.

To service customers better, sales departments often rearrange territories. The biggest challenge is to maintain continuity. For example, user A can pass all accounts in New York to user B when territory responsibility changes. A creates a New York view in his C.A.T., issues a Copy Record command, passes the data to user B through any electronic mailbox. User B pastes the records into another C.A.T. database. The records may include all phone notes, letters, and meeting notes for the accounts and contacts in New York.

Using these basic "copy and paste" operations, a company can collect leads at a central site, dispatch the leads to branch offices, and have individual representatives follow up, all with minimal entry of data. Using the Make View command, the leads can be grouped by geography; and the leads are passed to the appropriate offices. The company saves money by lowering data entry while enhancing the level of service on leads.

Conversely, branch offices can generate leads and send them in for central mailings, using the same "copy and paste" operation.

With C.A.T, the user has the information for sales forecasting. C.A.T. users can prepare a list of events (such as a forecast by client), copy the data to the clipboard and paste the information into a spreadsheet. The data can then be massaged, analyzed, or graphed using the capabilities of a spreadsheet.

Using this feature, a company can consolidate reporting electronically. Individual users can prepare reporting requirements in C.A.T., copy the report to the clipboard, and send the report.

There the reports are consolidated at a central site by pasting each electronic memo into a spreadsheet. The data can then be analyzed, subtotaled, and graphed for fast reporting of results from remote offices.

The power of C.A.T. works for groups as well as for individuals.

Appendix B: References For Preset Text

C.A.T. provides the following References which can be used to simplify your preparation of correspondence and reports. References may only be used in the Note field of the Activity window and must be entered between markers. (See "Managing Activities" in Chapter 3 for usage examples.) To enter references, just type the Hot Keys shown.

Reference	Hot Keys	Represents	
▶	Option . (period)	Beginning of Text Block	***Markers***
◀	Option , (comma)	End of Text Block	
ACCT	Option y	Account Name	***Account Information***
Acct #	Option p	Account Number or Alias	
C·S·Z	Option 5	City, State, and Zip Code	
ADDR	Shift Option =	Street Address	
CITY	Option m	City	
STATE	Option d	State	
ZIP	Option w	Zip code	
	Option l	Mail Stop (lower-case letter "l")	
	Shift Option p	Account Phone Number	
	Option z	Contact 's Full Name.	***Contact Information***
L-NME	Option ' (apostrophe)	Last Name	
F-NME	Option o	First Name (lower case letter "o")	
ALIAS	Option 1 (number "1")	Contact's Alias	
	Shift Option /	Phone Extension	
DEAR	Option v	Salutation.	***Correspondence***
E-DATE	Option f	Date of Selected Event.	
	Option x	Time of Selected Event.	
Today	Option j	Current date from Macintosh clock.	
Prior	Option \	Date of the event preceeding the selected event.	

The following references are used to insert lookup codes in the Note field of event records. The first eight references are lookup codes from the **Codes** window; the last four are from the **Contact** window. Since each Lookup Table is custom defined, the meaning of each table depends on your usage.

Lookup Tables

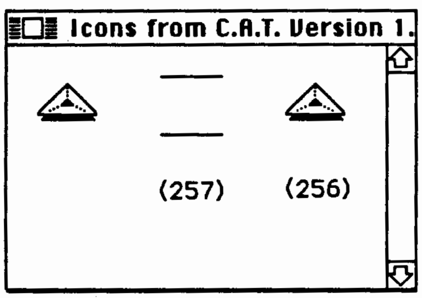
1	Option - (hyphen)
2	Shift Option - (hyphen)
3	Option [
4	Shift Option [
5	Option]
6	Shift Option]
7	Option /
8	Shift Option v
9	Option r
10	Option g
11	Option 2
12	Option e

Appendix C:
Creating Your Own Logo

To create your own logo, yo need a Macintosh utility program called "Resource Editor". If you do not have this utility, check with your local dealer.

Load the Resource Editor and your C.A.T. Work Disk. Double click on the Resource Editor icon and a dialog box will appear with multiple filenames displayed. Double-click on the "C.A.T." program filename.

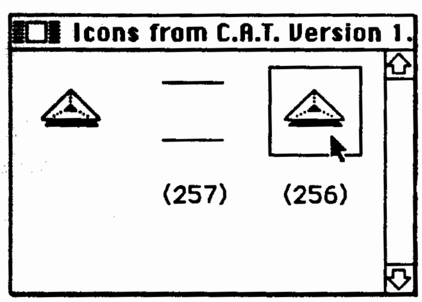
A window titled "C.A.T." will appear, also with multiple filenames displayed. Double-click on "ICON". A window titled "Icons from C.A.T." will appear with three items as shown below:



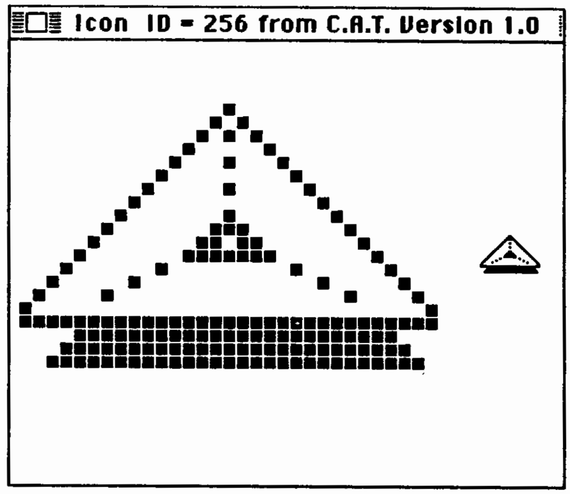
(The icons have been labelled for your convenience.) You will:

- Edit the icon labeled "256" to create a Single logo or
- Edit "256" and "257" to create a Double logo.

Double-click to open "256" as shown in the following illustration:



A window titled "Icon ID = 256" will appear with the C.A.T. logo in it:



The area for creating your logo is 32 dots wide. A printed image is 3/8" wide. Click with the mouse to remove the C.A.T. logo and create your own logo pixel by pixel. An actual-size image of your design will appear on the right side of the window as you work. If you wish to create a double logo, double-click to open "257" and complete your design. The combined image of "256" and "257" is 3/4" wide.

When you are ready, close the "C.A.T." window and you will be prompted to save. Click "Yes", then choose the Quit command from the File menu. Your logo will appear in the upper right corner of printed reports.

Appendix D: Keyboard Commands

Menu Commands	Keys to use
Open	Cmd O
Save	Cmd S
Print...	Cmd P
Quit	Cmd Q
Run Micro	Cmd R
Cut	Cmd X
Copy	Cmd C
Paste	Cmd V
New Event	Cmd 0
New Account	Cmd 1
Codes	Cmd 2
New Contacts	Cmd 3
Activity Class	Cmd 4
New Activity	Cmd 5
Tactics	Cmd 6
Accounts List	Cmd 7
Contacts List	Cmd 8
Event Snapshot	Cmd 9
Calender	Cmd '
Activity List	Cmd -
Status	Cmd =
Lock	Cmd L
Make View	Cmd M

Other Commands

Window	Keyboard Commands	Extended Keyboard Commands
Entry windows	Cmd G	Home
Entry windows Lookup Table Contact List	Cmd U Cmd D	PgUp PgDn
All windows	Cmd W	End
All windows	Cmd ?	Help
Entry windows only	Cmd E	Enter
Entry windows only	Cmd K	Clear

Extended keyboard commands available for Macintosh II and SE.

Appendix E: Disk Management

C.A.T. Files

When you set up a new C.A.T. database and save your entries for the first time, two files will be created:

- **A Data** file which contains all account, contact, activity, and event records;
- **A Notes** file which contains the addresses of all accounts and all of the entries made in Note fields.

Renaming Files

When you create a new C.A.T. database, the default names will be "Untitled" and "Untitled-NOTES." If you choose to rename these files, keep in mind that they MUST have the SAME NAME in order for information from one to be tied to the other automatically when you load. The first part of the Notes filename must be the same as the Data filename followed by "-NOTES".

If you change the name of your data file and forget to change that of the notes file, C.A.T. will let you know that a matching Notes file could not be found when loading. You will be given the opportunity to load a Notes file with a different name. When you save and exit, C.A.T. will prompt you to change the name of the Notes file so that it matches the name of the Data file.

It is very important to keep track of both files to insure that your notes will appear in the correct Note field for each account, contact, activity, and event record.

Lost Notes Files

If you lose your Notes file by accident, all of the information entered in Note fields as well as the the addresses of your account records will be gone. However, the Data file will remain intact.

Backup Your Data

When backing up, be sure to make copies of both files. The larger your files, the more likely the files can be corrupted due to disk media problems. Media is generally 99.97% reliable, but unfortunately never 100%.

Using Multiple Disks

When you first begin to use C.A.T, the two files can reside on the same disk and C.A.T. will automatically load both. But as your database grows, you may have to store your Notes file on a separate disk. C.A.T. will first try to find the Notes file with the same name on the same disk. If a Notes file is not found, C.A.T. will prompt you to load one. You can then direct C.A.T. to the second disk to load the Notes file.

To move the Notes file to a separate disk, simply drag the file to a new disk. Then remove the Notes file from the original disk by dragging it to the "Trash".

Out of Memory

Periodically check the Status window under the Show menu. As free memory drops below 10,000, you need to either upgrade your system by adding more memory or re-use old account and contact records when you need new ones. In other words, replace the old with the new.

Glossary

account: A record entered in C.A.T. to store the names and addresses of companies or individuals.

active window: The frontmost window on the desktop.

activity: A record entered to store information about any subject matter that you wish to keep track of in C.A.T. Simple activities could be letters, phone calls, and meetings. Significant activities could be orders, contracts, or proposals.

activity class: A general heading for grouping different types of activities. Think of activity classes as file drawers, and activities as folders in each drawer.

auto-dial: The phone symbol in C.A.T. that enables you to dial via a modem or equivalent device.

back up: To make an extra copy of your files on disk in case the original is lost or damaged.

backup disk: A disk on which you keep extra copies of your files for safe keeping.

button: Part of a dialog box or window that is clicked to perform certain actions.

clairvoyant field: In C.A.T. windows, a heavily outlined field used to locate record names.

clairvoyant search: A method used in C.A.T. to select and link records. When the first letters of a name are typed in a clairvoyant field, C.A.T. displays possible matches.

click: To position the pointer on something, press and quickly release the mouse button once.

cloning: A feature in C.A.T. used to create event records for more than one account or contact at a time.

close: To clear a window from your desktop by clicking the close box.

close box: The little square on the left side of the title bar of a window. Click in it to close the window.

command: An action for C.A.T. or the Macintosh to perform when selected.

contact: A record entered in C.A.T. to store the full names of individuals and other individual-specific information. Every contact must be linked to an account.

database, relational: A system which stores information in multiple files which are linked together.

dialog box: A box that appears on the screen with options or messages for you.

disk: The magnetic medium on which the Macintosh stores information. Macintosh uses a 3.5" floppy disk.

dossier: A history of an account which can be printed as a report.

double-click: To position the pointer on something, press and release the mouse button twice in quick succession without moving the mouse.

drag: To position the pointer on something, depress the mouse button, and move the mouse; then release the button.

echo field: In C.A.T. windows, a dot-lined field where record names are displayed when you type in the adjacent clairvoyant field.

entry window: C.A.T. has two types of windows, one for displaying and the other for entering data. Most entry windows are characterized by a solid black strip across the top of the window. Certain entry windows, however, are dialog boxes.

event: A record entered in C.A.T. to store information about a specific activity with a specific contact on a specific date and time.

export: Copy C.A.T. records and make them available for other applications or another C.A.T. user via the Clipboard. See also Sharing.

Finder: A Macintosh tool on the desktop to manage documents and applications, and to access and keep track of information on your disks.

Goto arrow: A C.A.T. symbol to help you navigate among various windows. Clicking a Goto arrow beside a field displays related windows.

highlight: To select and display an item in reverse video.

hot keys: Keys on the keyboard that you press to enter references for preset text.

I-beam: A blinking cursor on screen used for text entry.

icon: A graphic representation of an object, concept, or message.

import: To enter data into C.A.T. via the Clipboard.

initialize: To prepare a disk for use on the Macintosh.

insertion point: The spot in a field where data is entered (by positioning the I-beam and clicking).

link: The relationship between records in C.A.T. (e.g. a contact is linked to its account; an event is linked to a contact and activity).

list window: C.A.T. has two types of windows, one for displaying and the other for entering data. List windows display records and are characterized by six parallel lines across the top of the window.

lock: An action that protects your C.A.T. database from unauthorized use.

lookup code: Any attribute that you wish to assign to distinguish one account or contact from another.

lookup table: A set of lookup codes.

macro: Instructions embedded in computer-understood form telling the computer program to perform certain functions automatically.

memory: The place in the Macintosh where information is stored temporarily.

menu: A list of commands that appears when you click on a menu title in the menu bar at the top of the screen.

mouse: A small device that you roll on a flat surface to move the pointer on the screen.

Next button: A diamond-shaped box that lets you review records. Clicking the bottom of the diamond displays the next record; clicking the top displays the previous record.

notes: Any information that you wish to record in a Note field in C.A.T. windows.

open: To display a window by double-clicking on an icon or choosing a command from a menu to display a window.

password: A string of characters that you enter to access a locked C.A.T. database.

pointer: A small shape on the screen that tracks the movement of the mouse.

preset tactic: A preliminary or follow-up activity which can be set up in advance so that whenever a primary activity is scheduled, the tactic activity will be scheduled as well. This feature helps you create a tickler file.

preset rate: This is the hourly rate set up in advance in the Tactics window to let you compute billable amount for time spent on a certain task.

preset text: Any text that you wish to set up in advance (between markers) in the Notes field of the Activity window (i.e., the contents of a form letter).

priority box: This is a status box on the left of the Account List, Contact List, and Events Snapshot windows. It lets you prioritize your accounts, contacts, and tasks.

RAM: Random Access Memory. The memory inside the Macintosh that can be directly accessed by the computer. RAM is only a temporary working place while the computer is on.

records: Information that you enter in C.A.T. is stored as records, one for each account, contact, activity, and event.

recur: To schedule a periodic event indefinitely into the future (e.g. monthly staff meeting).

references: Symbols that you can enter by pressing Hot Keys.

save: To store information on a disk.

save as: To save a file to disk by a different name.

scroll: To use the scroll bar or arrows to view different parts of a window's contents.

scroll box: The white box in a scroll bar. When dragged by the mouse, it is used to view different parts of a window's contents.

select: To choose an item or option.

sharing: Passing information among C.A.T. users and among applications.

size box: A box in the lower right corner of windows used to resize them by dragging with the mouse.

to-do box: This is a status box in C.A.T. to let you distinguish completed (done) tasks and those still "to do."

view: A list of accounts or contacts that you create to organize and display data on-screen.

window: Windows display information for you to view. Windows can be opened, closed, resized, and moved around on the screen.

work box: The work box (on the left of the Account List, Contact List, and Events Snapshot windows) is checked automatically by C.A.T. when you work with an account or contact. All work-box checks disappear when you save to disk.

zoom: When you click on a highlighted record in a list window, you zoom from one level of detail to the next (i.e., a window opens displaying further information about the highlighted record).

Index