

Call Box

Quick Start Guide

This quick-start guide was written to give you the basics so you can jump right in and get started using CallBox fast.

As you become familiar with the program, you will discover other features and benefits not covered in this guide.

If you have any problems or need to ask a question, you can contact me at:

redhousesoftware@comcast.net

You may also find helpful information and a Q&A on our website at:

<http://www.redhousesoftware.com>

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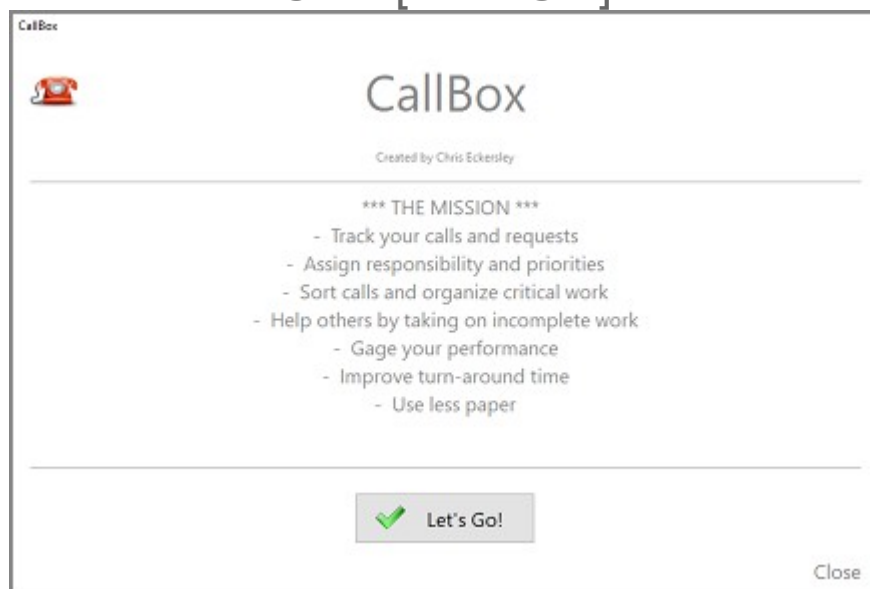
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START UP

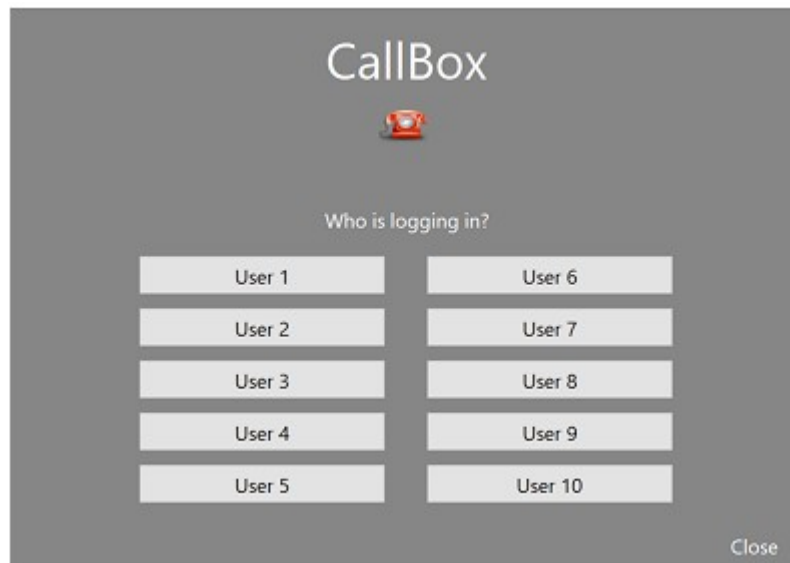


To start CallBox, double-click the CallBox icon on your desktop.

The startup window opens.
Click [Let's Go!]



LOG-IN And Editing User-Names

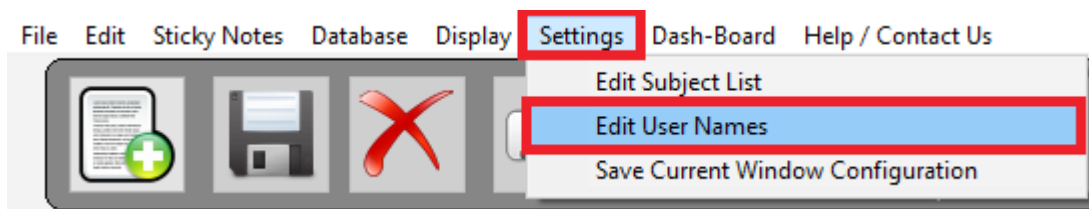


You can have up to 10 different users.

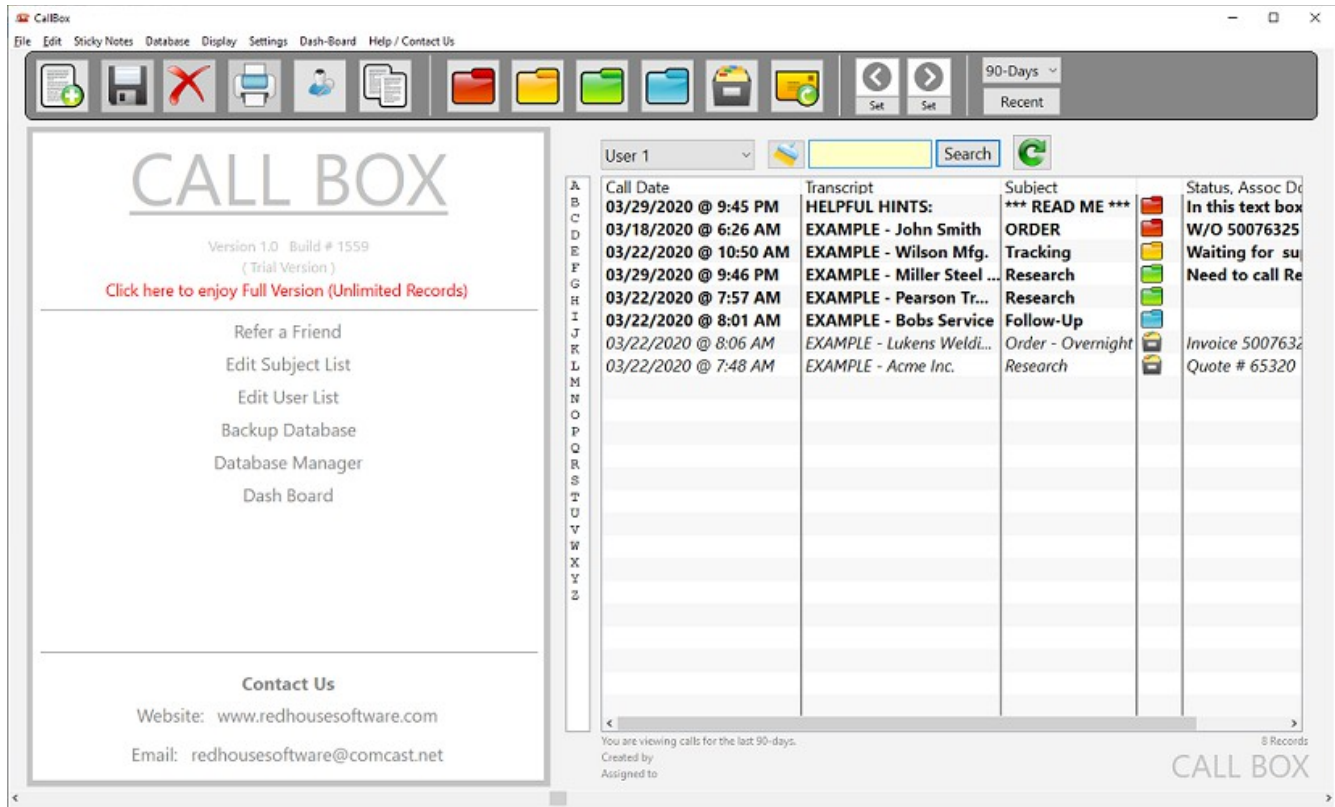
There is no password to log-in to CallBox.

To log-in, simply click one of the 10 user buttons as shown above.

The user-names on the 10 buttons can be changed from the main window as shown in the screen-shot below.



Main Screen



The main screen immediately after startup will look something like the screen-shot shown above.

Most of all the controls are shown across the top.



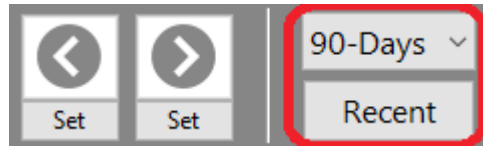
These buttons located on the **top left** are for record creation functions such as Add, Update, Delete, Print, Contacts, and Duplicate.



The buttons at the **top middle** are for tagging your records with varying degrees of importance (Red, Yellow, Green, Blue and File Cabinet). Note that records are sorted in that order. The [**mail forward**] button is for sharing records with other CallBox users. You can send a CallBox record to anyone in the world that has an email address and has CallBox installed. More information on sending records will be discussed later.



If you use dual monitors, use these arrow buttons to instantly send the CallBox window to the Left or Right monitor. This little feature helps in a big way. For example, you may often have multiple programs running at the same time and you need CallBox displayed as well. Simply click the Left or Right arrow button to send CallBox to another screen so you can see and interact with the programs displayed behind it. To set this up, simply drag CallBox to the desired position on your Left monitor, then click the Set button. Then drag Callbox to the desired position on the Right monitor, then click the Set button. The positions are now saved so that when you click the Left or Right arrow buttons, CallBox will instantly move to the desired location.



Use this drop-down button to make quick changes to the date range with a single click (rather than taking the time to set the date range yourself). You will probably find that just using the **Today, 2-Days, 7-Days, 30-Days, 60-Days, or 90-Days** selection in that drop-down is all you will ever need. But you can set the date range manually by selecting **Custom** from the drop-down list.

The [**Recent**] button displays the last 10 records you were working on. This is a nice feature because in a busy office you probably get interrupted frequently with other calls or requests that take you away from what you were working on. To get back to what you were working on, simply click the [**Recent**] button and select the record in the list you want to work on.

Example Record

The screenshot displays the CallBox software interface. On the right, a table lists call records. The record for '03/22/2020 @ 7:57 AM' is selected, and its details are shown in a text box on the left. The text box contains the following information:

EXAMPLE - Pearson Trucking.
555-8596

Needs pricing on LPG Regulator for
Clark CY408-123-965

Found that this forklift was originally shipped from factory
with gas (not LPG). Need to call customer back to get
numbers off of his LPG Regulator to identify it.

Status, Associated Document # or Pending Action

Waiting Emailed Doc # Custom Edit

Call Date 03 / 22 / 2020 @ 7:57 AM
Completed Date 00 / 00 / 0000 @

Call Date	Transcript	Subject	Status, Assoc. Doc#, Pending
03/18/2020 @ 6:26 AM	EXAMPLE - John Smith	ORDER	W/O 50076325
03/22/2020 @ 10:50 AM	EXAMPLE - Wilson Mfg.	Tracking	Waiting for supplier to cal
03/22/2020 @ 7:57 AM	EXAMPLE - Pearson Trucki...	Research	
03/22/2020 @ 8:01 AM	EXAMPLE - Bobs Service	Follow-Up	
03/22/2020 @ 8:06 AM	EXAMPLE - Lukens Welding.	Order - Overnight	Invoice 50076320
03/22/2020 @ 7:48 AM	EXAMPLE - Acme Inc.	Research	Quote # 65320

When you select a record in the list on the right as shown in the screen-shot above, the record data populates into the text-boxes on the left.

SEARCHING:

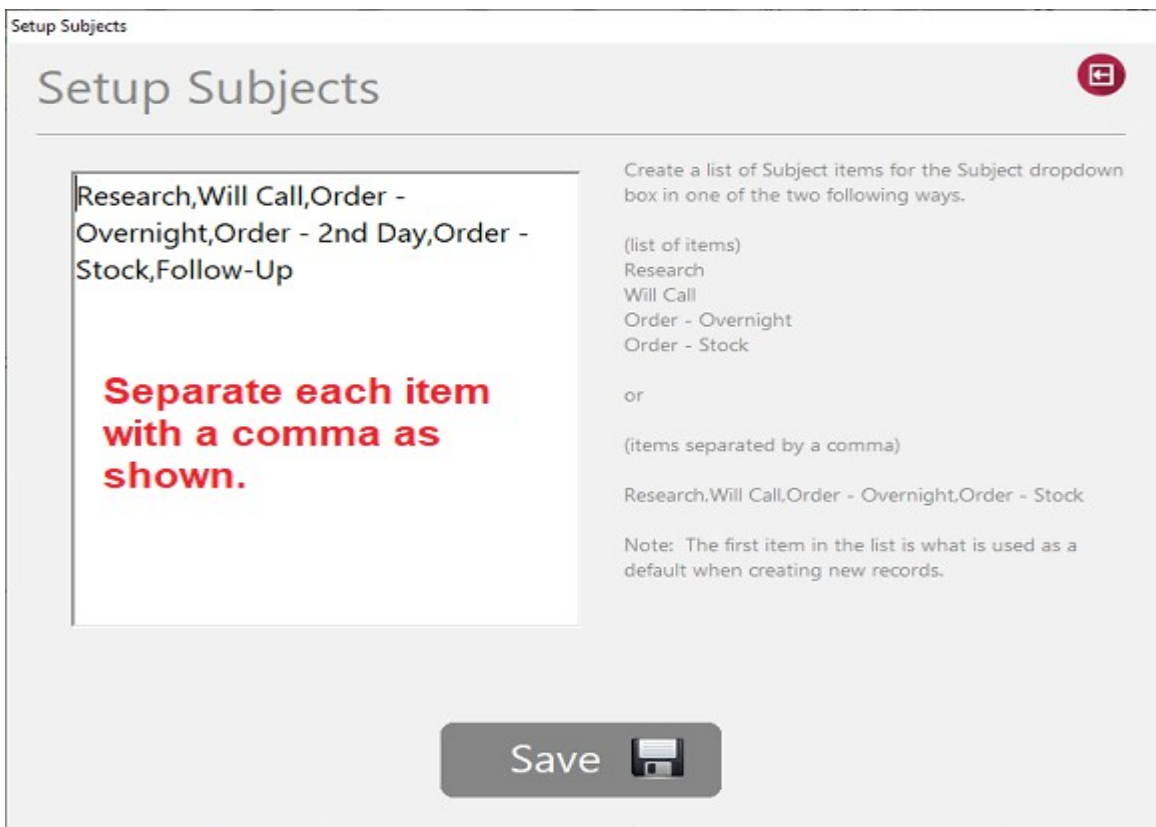
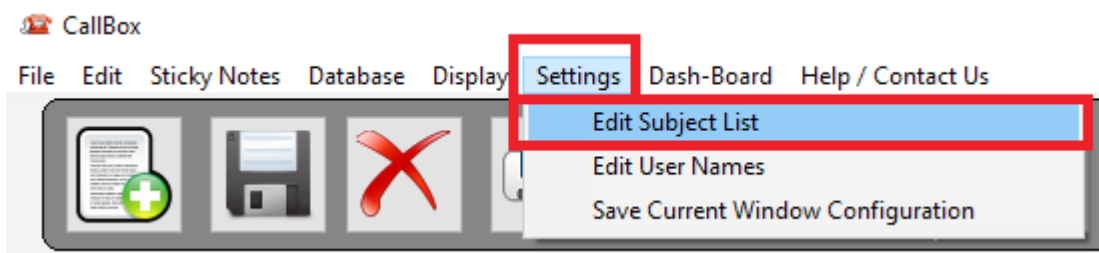
The yellow search box above the record list is used to search the entire database within the selected date range.

The yellow search box above the text-boxes on the left is used to search the fields of the currently selected record. This comes in handy at times when you have a lot of text in the text-boxes and you are looking for something specific that you know is buried somewhere within the text of the record.

SUBJECT:












The drop-down box circled above is the "Subject" of the call. You can type whatever you want in the box or select one in the list. The first one in the list is the default when creating new records. You can edit the subject list to suit your needs from the **Settings** menu shown below.



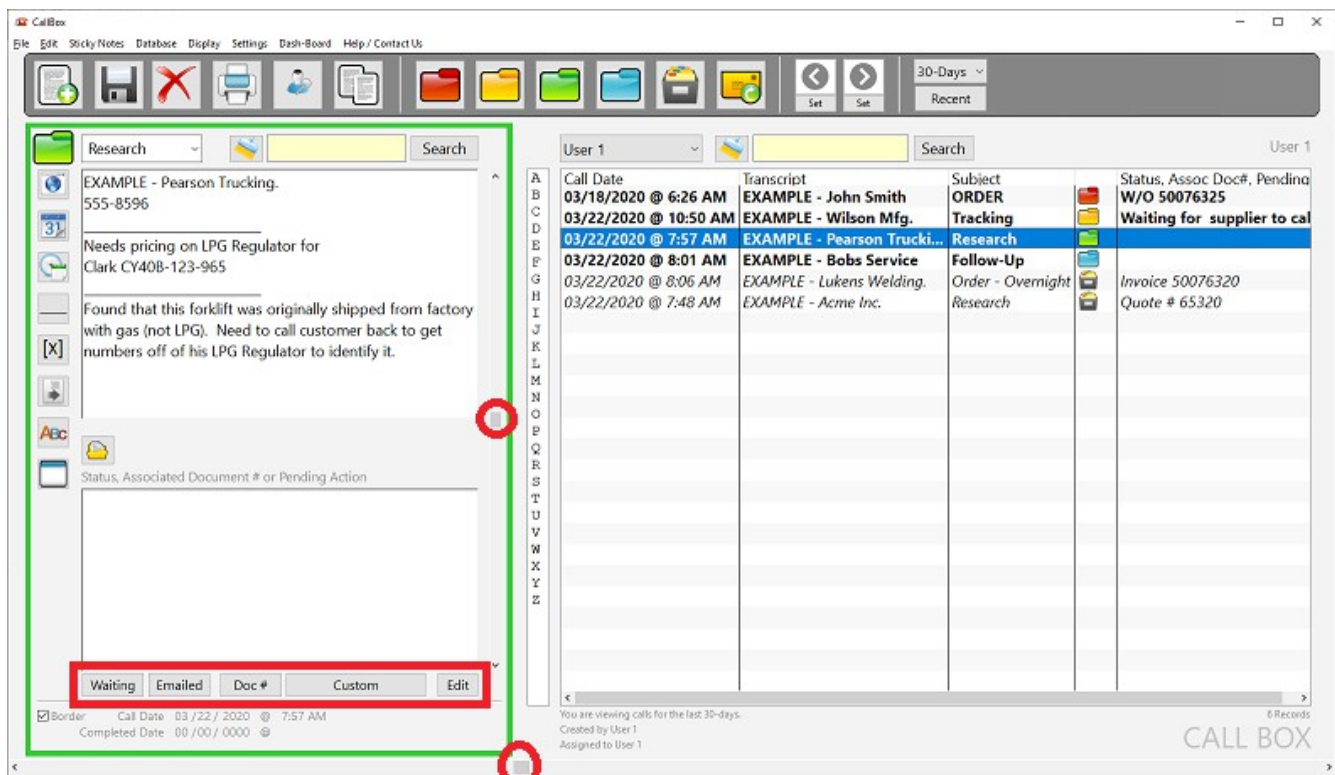
EDITING CONTROLS:

These control buttons on the left side shown below allow you to make quick inserts into the transcript text-box saving you time.

	- The folder icon <u>at this position</u> is only a visual cue that represents the status or importance of the record. It has no function.
	- The globe button opens a window and displays email and web-links, and local file links associated with the current record.
	- The calendar button inserts the date at the cursor position.
	- The date-time button inserts the date and time at cursor position.
	- The separator button inserts a horizontal line at cursor position.
	- The [X] button inserts a checked box at cursor position.
	- The indent button inserts an indent at cursor position.
	- The ABC button capitalizes the first letter of every word.
	- The window button opens a large window for editing the transcript giving you much more room to work with if needed.

OTHER EDITING CONTROLS:

These two circled items below are scroll-bar handles. One controls the height of the text-boxes, and the one at the bottom controls the width of the text-boxes and data grid.



The buttons outlined in red inserts the button caption into the Status text-box at the cursor position.

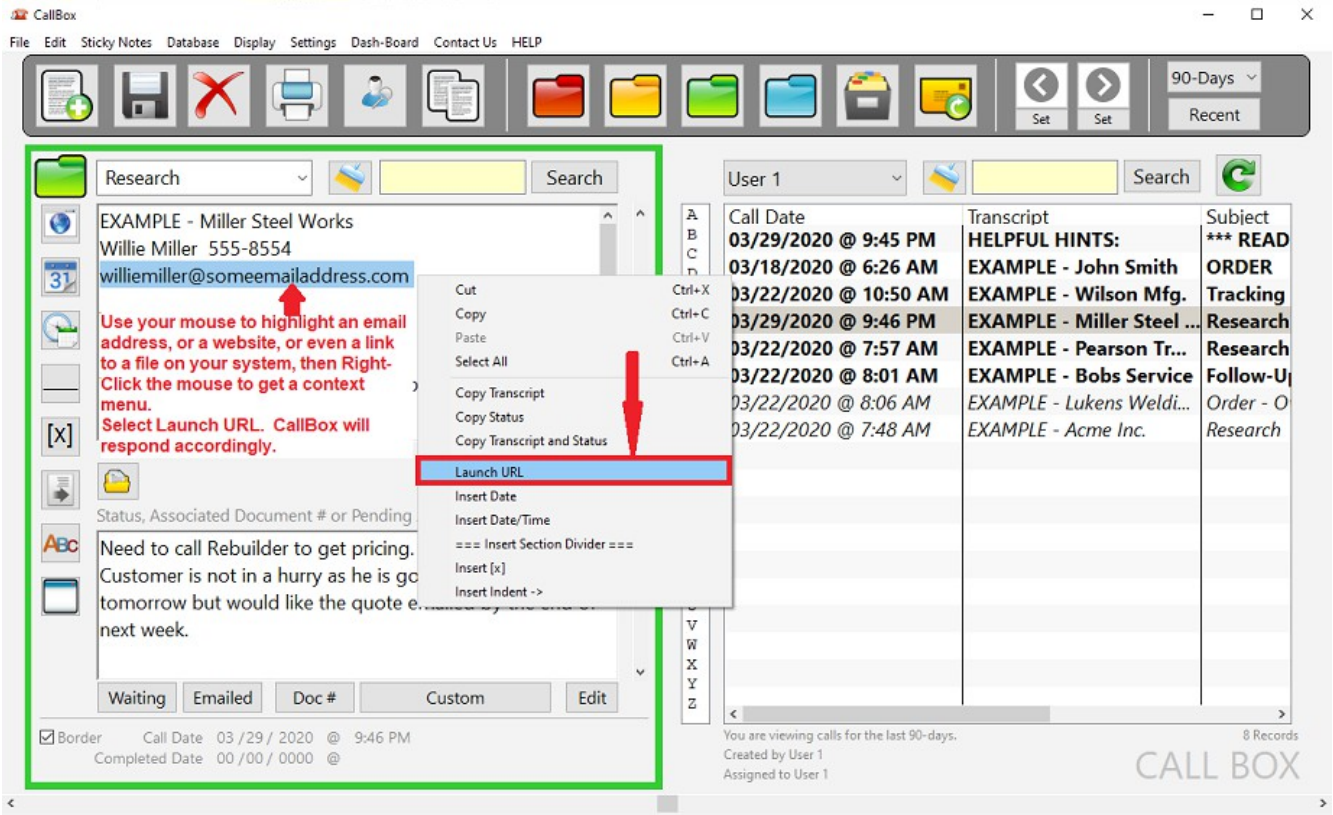
The **Edit** button allows you to change the button caption on the **Custom** button.

Call Date and Completed Date (shown at the bottom left)
Call Date is the date the record was created.

Completed Date is the date you posted it to the file cabinet.

If you ever need to edit those dates, you can type over it then click **Update**.

LINKING FILES, WEBSITES AND EMAIL LINKS:



One of the really cool features of CallBox is linking files to a record. CallBox will open any file address, web address, or email address accordingly.

Simply use your mouse to **highlight the address**, then **right-click the mouse** and select **Launch URL** as shown above.

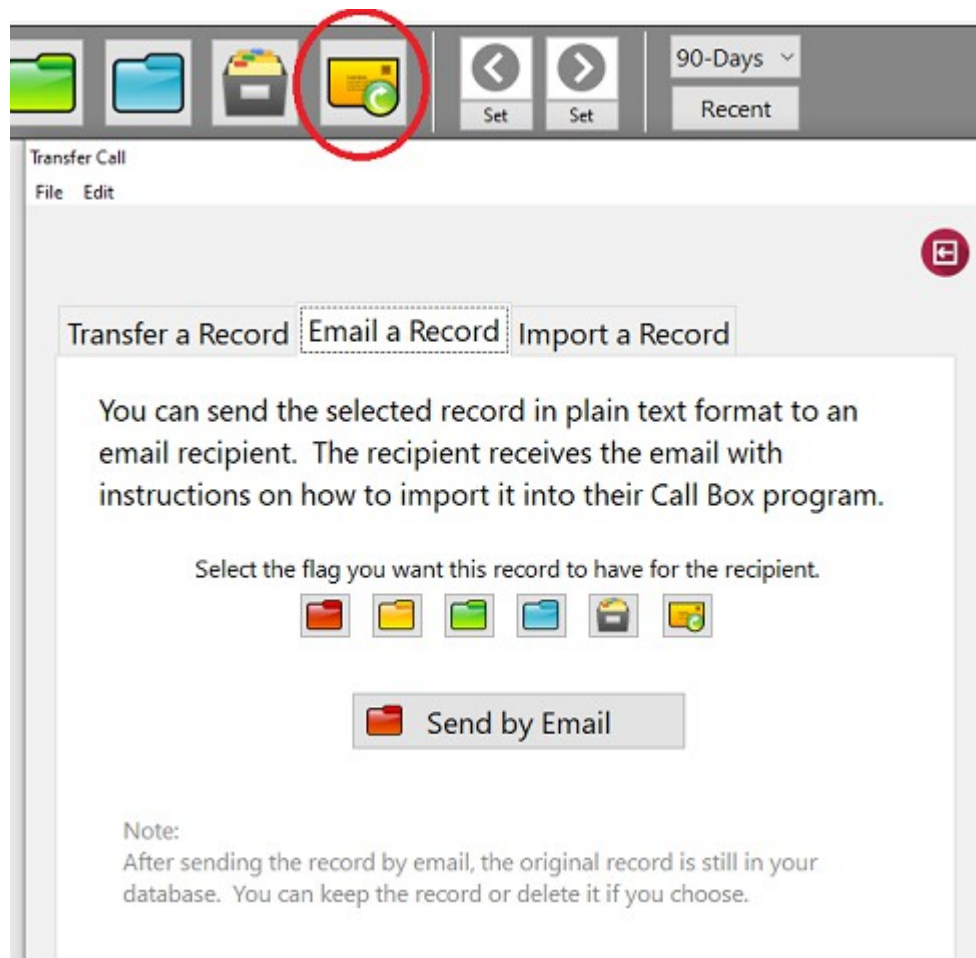
If it is an email address, your default email program will pop up with the recipient address already filled in.

If it is a file on your system, CallBox will open it.

If it is a web address, CallBox will launch it.

If you have several links in the text-box, and you want to see a list of all the links, click the Globe button on the left. The Link Extractor window will open and read all the links of the current record and will list them in a listbox. From there, you can select one from the list to open.

TRANSFERRING RECORDS BY EMAIL:



To transfer a record to another CallBox user by email, click the **Transfer** button on the main window (shown in the red circle above). The Transfer Call window opens. On the Email a Record tab, click the **Send by Email** button. The record is still in your database to do with as you choose. The recipient gets the email with instruction on importing the record into their CallBox database.

IMPORTING A CALLBOX RECORD FROM EMAIL:

Transfer Call
File Edit

Email a Record Import a Record

If someone has emailed you a Call Box record containing text such as:

```
[USERNAME]data[/USERNAME]
[CALLDATE]data[/CALLDATE]
[TRANSCRIPT]data[/TRANSCRIPT]
[SUBJECT]data[/SUBJECT]
[FLAG]data[/FLAG]
[ASSOCIATEDDATA]data[/ASSOCIATEDDATA]
[COMPLETIONDATE]data[/COMPLETIONADATE]
[ASSOCIATEDFILES]data[/ASSOCIATEDFILES]
```

Simply Paste it into the rendering box below, then click the Import button. The data will be parsed into separate fields and added as a new record.

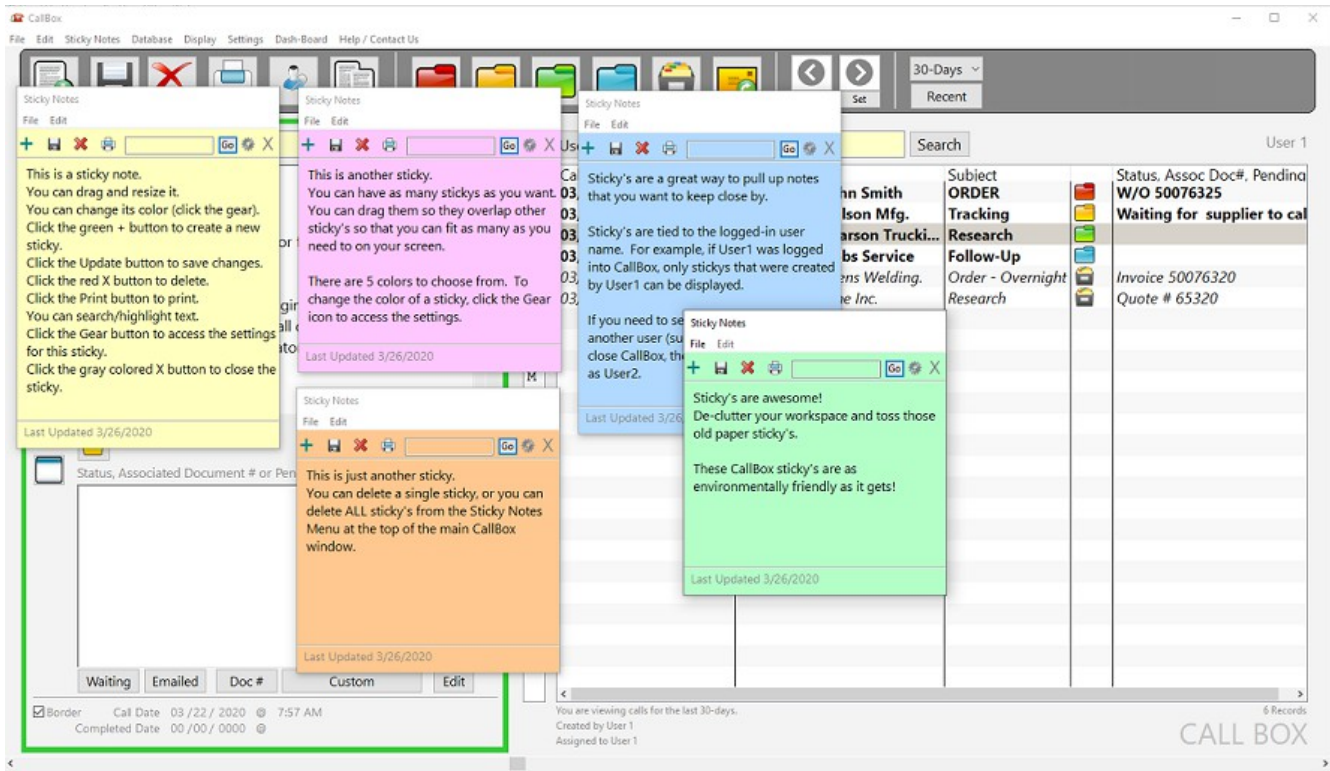
```
[USERNAME]Chris Eckersley[/USERNAME]
[CALLDATE]02/23/2020 @ 6:51 PM[/CALLDATE]
[CALLDATEMONTH]02[/CALLDATEMONTH]
[CALLDATEDAY]23[/CALLDATEDAY]
[CALLDATEYEAR]2020[/CALLDATEYEAR]
[CALLDATETIME]6:51 PM[/CALLDATETIME]
[COMPLETIONDATE][[/COMPLETIONDATE]
[COMPLETIONMONTH]00[/COMPLETIONMONTH]
[COMPLETIONDAY]00[/COMPLETIONDAY]
[COMPLETIONYEAR]0000[/COMPLETIONYEAR]
[COMPLETIONTIME][[/COMPLETIONTIME]
[TRANSCRIPT]Industrial Parts Example Inc. - John Smith[CARRIAGERETURN]Phone: 555-4563
[ASSOCIATEDFILES]Fax: 555-9632[CARRIAGERETURN]Email:
```

Import

If another CallBox user sends you a CallBox record by email, you can import the record into your CallBox database. It will be an exact duplicate record of what they sent you.

Just copy the block of code in the email and paste it into the rendering box as shown above, then click the Import button. The record will now appear in the data grid on the main window.

Sticky Notes

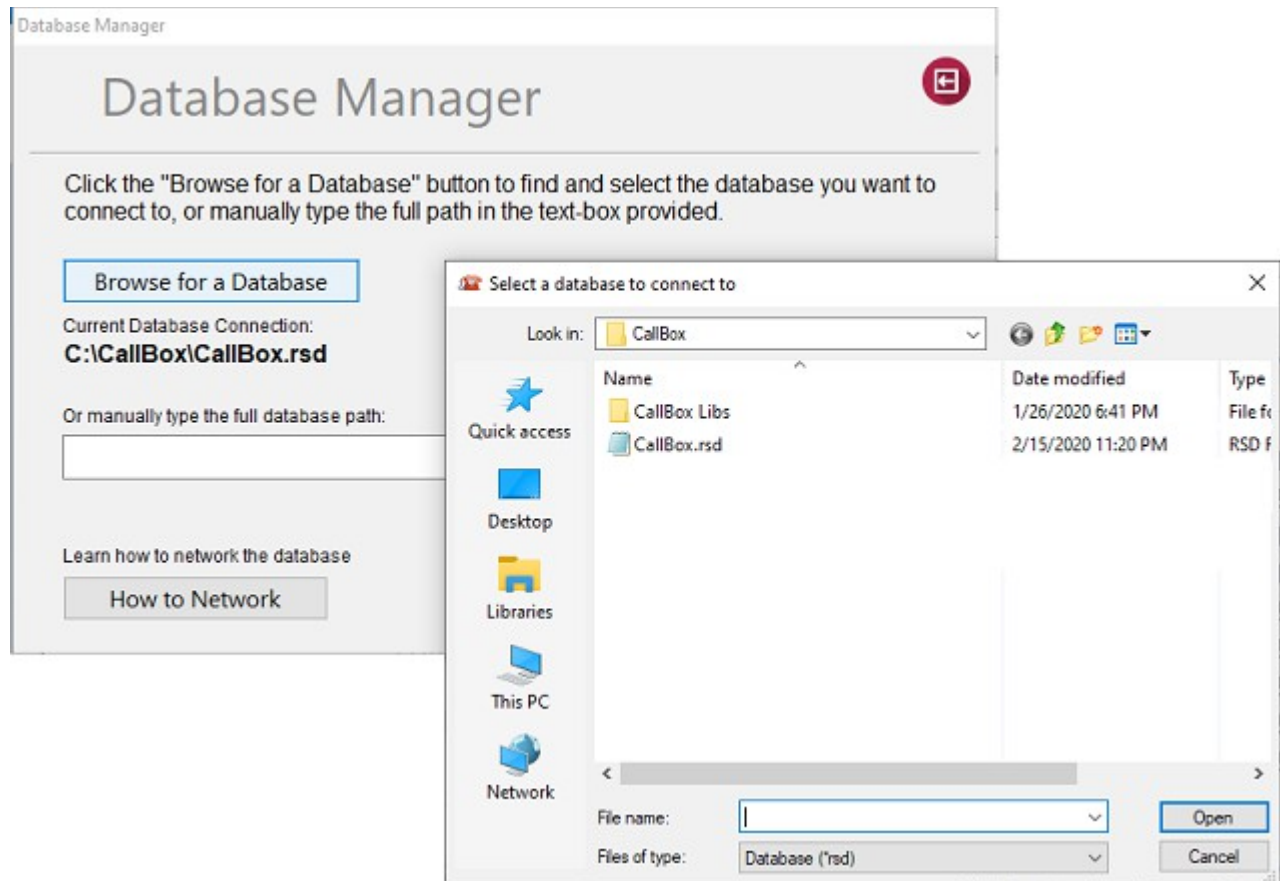


The sticky notes feature is easily accessible from the **Sticky Notes File** menu at the top of the main window.

Sticky notes can be dragged to any location on your screen. The gear icon on the sticky notes is how you access the settings where you can change colors, and view only certain colors of sticky notes.

At the top of each sticky note are controls that allow you to create more sticky notes, save, delete and print, as well as a search box that highlights your search word in the sticky note text. You can create as many sticky notes as you want.

Database Manager



The Database Manager is accessed from the **Database Manager File Menu** at the top of the main window. It simply allows you to connect to a CallBox database that is on your local computer or elsewhere on your file system.

Reasons for copying the database to your company server:

- Part of your company server is more than likely backed up everyday, which means if you copy the CallBox database (CallBox.rsd) to your company server, the database will be backed up when the server is backed up. **Check with your IT manager to verify this.**

- **NETWORKING:** You might be able to have more than one computer accessing the same CallBox database, **however the database is NOT optimized for many simultaneous connections.** If you experience problems such as CallBox lagging or crashing, it is probably not surviving well with multiple connections to the same database. In that case, you could either keep the database on the local machine, or if you want the database on the server, consider creating a separate folder for each CallBox user on your server, then copy their CallBox.rsd database to their folder you just created on the server. Perhaps even **re-name** the CallBox.rsd database to the name of the user as well so that when using the Database Manager, you can see clearly which database you are connecting to. Then when you run CallBox on your local machine, use the Database Manager in CallBox to connect to the appropriate database. **This is also useful if you use more than one computer yourself. You can access your specific CallBox database from any computer on your network.**
- Note that CallBox remembers the most recent database connection so that the next time you start CallBox it will automatically connect to the database it was previously connected to.

A Few Tips

TIP #1

Break your old habit of answering your phone poised and ready to "write" with pen and paper. Break that habit now. I know it might feel really strange if that is what you have been use to doing. Trust me, it was very strange for me as well to break that habit. Instead, get use to answering the call and clicking the **New Record** button and start typing the callers words into the transcript text-box.

Likewise, if it is an email that you received, Copy the text from the email and Paste it into a new CallBox record.

NOTE: THE FIRST LINE IN THE TEXT-BOXES IS WHAT YOU WILL SEE IN THE COLUMNS OF THE DATA GRID.

TIP #2

If you create a quote or order/invoice in your business system, I suggest you type that quote number or invoice number into the lower text-box of CallBox. That way the CallBox record can be found easily when searching by your quote number or invoice number as well.

Why CallBox?

I wrote CallBox to help me keep my tasks organized at work and do my part in reducing the massive amounts of paper my job generates. Instead of writing down requests for orders and quotes from all my customer phone calls, and printing emails, I log everything in CallBox and only print things that are absolutely necessary. This helps my employer's goal of someday going "**paperless**".

How I use CallBox

After months of heavy use, I have learned to use CallBox in the following way. You might find other ways that work better for you, but if you work in a busy office that requires you to interact with customers in person, and on the phone, and call or email customers and vendors, and you find that you have stacks of paper all over your desk, you might find the way I use CallBox to be helpful for your situation as well.

Flags (Folder Colors)

Red - is for anything that is an order.

Yellow - is for anything that I am waiting for a customer or vendor to call me back on (waiting for info).

Green - is for records I'm actively working on that is not an order, such as a pricing request. It's my work in process.

Blue - is for things that can wait for a while or things that are non-critical, kind of like a cold-case file. I also use **Blue** as an indicator to follow up on, or a record with info about a transaction involving a parts return that has not arrived yet.

File Cabinet – is for any record that I am done with. Whether it be an order, or request for price, or whatever it may be, it is considered "Filed".

Refresh the Grid

As you create more and more records and they start stacking up in the grid, you can refresh the grid so that all the records are grouped by their folder color (**Reds** are first, followed by

Yellows, then **Greens**, then **Blues**, then **File Cabinets**). To refresh the grid, simply click the [**Refresh**] button above the data grid.

Date Range

When you start CallBox, the default date range is to show the last 90-days. You can easily change it in the drop-down box by changing the selection.

When to Delete Records

That's a good question. If your concern is that with more and more records adding to the CallBox system every day – you wonder... will the performance of CallBox become slower? No, it will not. As stated previously, I personally like to run CallBox so that it is showing all records for the last 90-days. Even if there are a million records or more in CallBox, it will not slow down because it is only grabbing 90-days worth of records (a very small slice of the pie).

If you're like me, you sometimes get those customers that call you and they say : “***Hey, remember that stuff we talked about a year ago? I need to go ahead and order that now.***”

I guarantee that using the **search** feature in CallBox will make your life so much simpler. All your communication is still there in the record and you can pull it all up with a simple search in CallBox. Whether you search for the customer's name, or a quote number, or a part number or any other word that exists in the record that ties that customer to the record, CallBox will pull it up.

So, in a nutshell, I don't delete any records unless there is a good reason for it.

Other Features

There are other features in CallBox not covered in this quick-start guide so I won't bore you with the details, you'll discover them easily from the main window.

Questions

If you have any questions about CallBox, please feel free to shoot me an email. If I don't respond right away, don't be alarmed, I have a day-job like most people do too, but I will certainly get back with you, usually in a few hours or by the next day. I would also love to hear from you about how you use CallBox and if you have any suggestions.

You can contact me at:

redhousesoftware@comcast.net

Thank you for your interest in CallBox !

Chris Eckersley
Creator of CallBox.