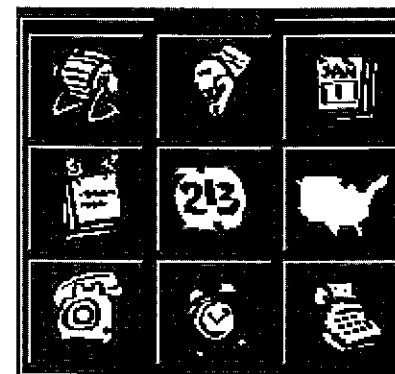# Office Manager In a Box

*Adamation's Who's Calling provides a total client-management system*

by FRANC GARCIA

Everybody would love to have a personal secretary. But since a software substitute may be as close as some of us will ever come, Adamation's Who's Calling 2.0 is a welcome arrival to the NeXT environment.

Designed to help sales professionals – or anybody who deals with lots of clients and colleagues – keep track of calls, messages, and appointments, Who's Calling is described by its creators Stephan and William Adams as a "fully automated client-management system." And despite some minor flaws, Who's Calling delivers on this promise. It offers more than the average database and is easier to use.

Who's Calling differs from flat-file databases like Stone Design's DataPhile in that it is relational, built on top of Ingres (with Oracle and Sybase versions available). But Adamation has foregone many of the formatting and customization features generally available in database packages. Likewise, Who's Calling differs from both flat-file and relational database front ends by offering a full suite of scheduling, call-tracking, and organization tools designed to be shared by users on a network.

What's new about Version 2.0? The upgrade includes interface changes, a host of new features, and better documentation. According to its creators, "If you haven't used Who's Calling 2.0, you haven't used Who's Calling."

## A modular approach

Who's Calling is organized into four modules: a Contact Database that includes the list of clients and client information; a Message Board, where detailed messages between users are sent and received; a Conversation Manager, which keeps track of client conversations and automatically schedules callbacks to those clients; and a robust Calendar, which in itself is a full-featured organizational tool that can be shared over a network.

The Contact Database is the reference point for all the modules. It contains preset fields, such as Name and Address; a scrolling view where custom fields can be added; and an unlimited capacity for telephone numbers per client record. A Client List is available to view, sort, and query all clients at once. In fact, it is only through the Client List that individual records can be selected for viewing in the Client Database.

Reports and mailing labels can be automatically generated from this module as well. These reports have a preset format that is relatively straightforward. But, like the Contact Database and other information, the reports cannot be customized.

In the Client List, users can search for any client or list of clients using any combination of the 15 commonly used preset fields. Wild-card queries can also be performed. These fields – which cover almost all the information you would need about a client – are convenient for salespeople who find it bothersome to have to customize their database, but the fact that these fields cannot be edited makes Who's Calling cumbersome at times. In addition, custom fields also can't be added to the Client List view, so the Contact Database will not be able to sort records according to the information a user might want them to contain.

Another part of the Contact Database module is the Media Well, a repository of multimedia files for each client record. It allows users to link several of any types of files or directories to individual records. By double-clicking the Media Well, linked files are displayed in a list, from which they can be opened. TIFF and EPS images, letters, or faxes can all be displayed in the Well if desired.

One minor problem exists, however: If a linked file is moved to a different location in the file system, Who's Calling will not display it in the Media Well the next time another user in the workgroup attempts to access it.

## Integrated applications

The second module, the Message Board, allows users to send detailed messages from callers to other users on a network. It differs from NeXT e-mail in that the messages are live, and sent immediately, rather than stored in a queue. And they are sent to a user's machine, no matter where that user is currently logged in on the network, so that each user's Message Board updates correctly and efficiently. At the end of the day, a report of received messages can be printed for easy review.

A User List is also available for quickly addressing messages, so a receptionist, for example, can send a written or recorded message to a number of people simultaneously by simply clicking names rather than having to type names or addresses.

Logging and organizing phone conversations is done in the Conversation Manager. In addition to logging calls with voice annotations, users can schedule callbacks to clients. The Who's Calling tickler, an alarm panel that even has a snooze option, will remind them of a scheduled call even if they are in another program or if Who's Calling isn't running. Users can automatically print conversation lists and phone logs, as well as post scheduled callbacks to the Calendar.

The Who's Calling Calendar is a separate application integrated into the main program. The Calendar provides three levels of detail: the Calendar view; an Agenda panel, into which events and reminders are listed; and an Event panel, into which information is entered. The Calendar can be viewed in month, week, and day views. The month view takes up most of the NeXT



A series of modules offers a suite of scheduling, messaging, and organizational tools.

## Who's Calling 2.0

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*Designed to help anybody who deals with lots of clients and colleagues keep track of calls, messages, and appointments, Who's Calling 2.0 offers a full suite of scheduling, call-tracking, and organization tools. The upgrade includes interface changes, a host of new features, and improved documentation. Despite some minor flaws, it offers more than the average database and is easier to use.*

**$495, single-user version**

*Adamation, 1435 Center St., Oakland, CA 94607. 415/452-5252.*

screen, so it can be read easily, unlike the Calendar app that ships with the NeXT. The six-month and day views are also ample in size. Items in the Calendar are categorized as phone calls, reminders, appointments, or reservations, and any combination of these can be displayed in any of the views. For example, a user can filter out anything but reservations and/or reminders for a view or time period.

Resources, one of the most powerful features of the Calendar module, will be especially useful for workgroups. A Resource, which can be thought of as a simple file representing a person or category, is defined and contains the information for a particular calendar. A calendar can then merge different information from other calendars or resources, either from their own lists, or across the network. For example, in trying to set up a meeting between several people, you can simply choose each participant on the network as a resource and then pull up a combination day view of this group calendar for a particular day.

The Calendar is power-packed, but it is also plagued with some interface idiosyncracies, like the fact that to-do lists are not displayed in the Calendar view. And dates being edited in the Event panel have to be entered manually even though they are already selected in the month or week view.

Who's Calling 2.0 also offers general features that make it easier to use than previous versions. This is especially important in corporate settings where temps have to get up and running quickly on software

they've never used. For example, voice alerts for deleting, saving, finding, and updating guide the user through the program. These can be turned on and off through the preferences panel.

## Good safety net

Who's Calling still lacks some



The Contact Database is the reference point for all the modules, with preset fields as well as a scrolling view for adding custom fields.

important features. For example, the database has very little in the way of formatting capabilities. It also lacks the ability to automatically fill in information based on keywords for a client from a linked reference file. And custom fields can't be added to the Client List.

Another area that needs improvement is the interface, which is cluttered and cumbersome. Sort Order, for instance, is not saved in the Client List. In the Conversation Manager, you must use the mouse to move from the first field rather than the Tab key.

The program keeps track of a lot of detail, but it also requires the user to enter much of it in a manner that can be tedious, like relying on the mouse.

And aside from the voice alerts mentioned above, Who's Calling lacks a good on-line help system. Luckily such a system – purportedly as good as Improv's – is under development for Version 3.0.

Among the other enhancements

scheduled for Version 3.0 is a Report Creator with customization features. Presently, reports are limited to a preset format that can't be changed. The program is also expected to be unbundled, so that each module can be purchased separately.

Installation of Who's Calling, though easier than earlier versions, is still difficult for networked users – which is ironic since the program is built for use on a network.

Who's Calling is a good idea that's well developed but still needs work. For the sales professional on the verge of buying another case of Post-It pads, it's a great tool –

once you master all its idiosyncracies. At the very least, it's a good safety net to catch those calls and appointments that would otherwise fall through the cracks.

If you tried Who's Calling in its first permutation and got overloaded by one too many windows, you should try Verison 2.0. There's enough improvement to merit another look. ◆

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