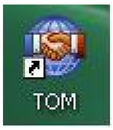
User guide

Telecare Office Manager

Contents

Signing on to TOM

To start TOM, double click on the Icon showing on your desktop



A TOM Logon screen will then appear. You should then enter your User Name and Password. After clicking the 'OK' button, TOM will start automatically and open your database ready for use.

Create a new Client Detail (Resident) Record

1. Right click after placing your mouse anywhere in the blue area of your screen and select New Contact

<u>OR</u>

2. Click on New Contact from the graphical Toolbar

<u>OR</u>

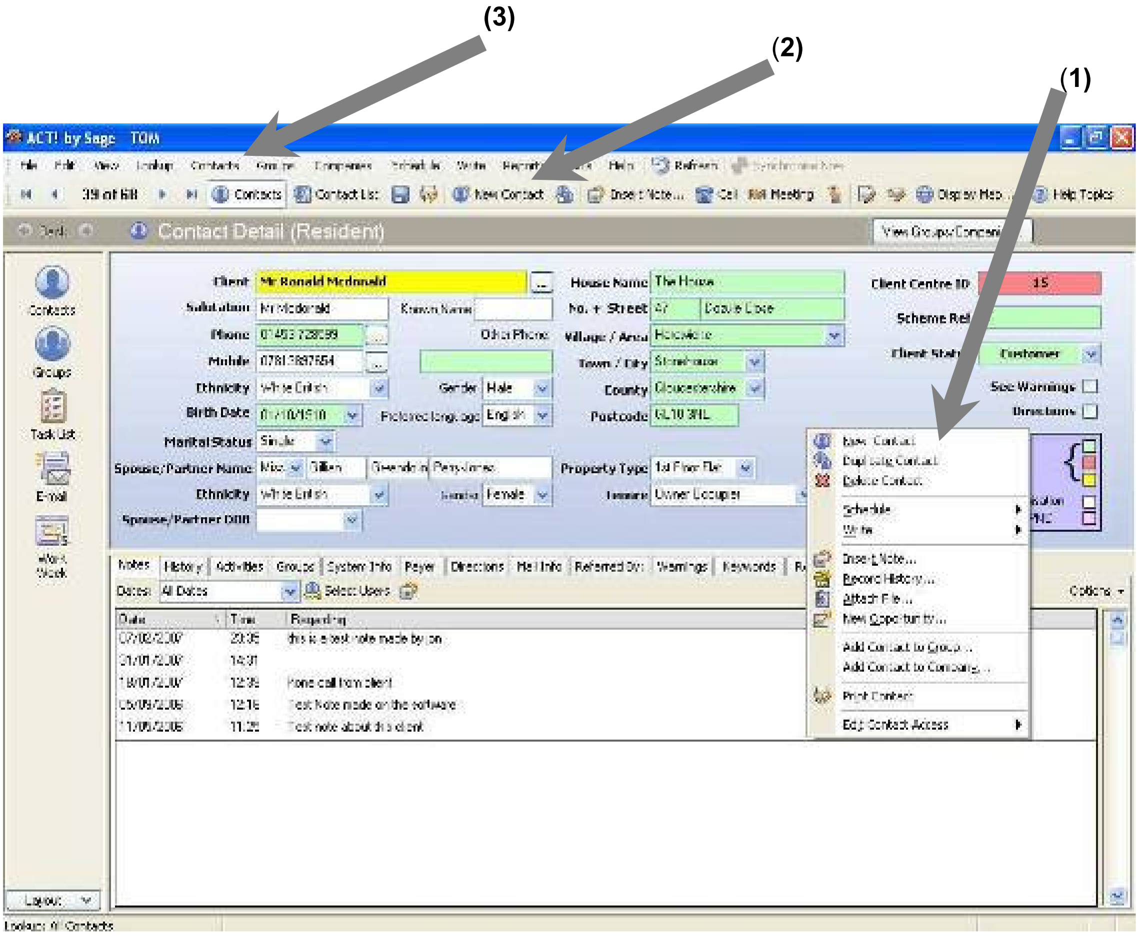
3. Select 'Contacts' followed by 'New Contact' on the top toolbar of your screen

Enter the new details into the fields provided by typing or using the drop down menus where shown

If Notes are required click on the 'Notes' tab and insert the relevant information - See the section 'Make a Client Note' later in this guide.

Cont/.d

The screen below shows the options for creating a new client record



Note:

The new clients name must be entered with their title first e.g. **<u>Mr</u> John Doe** or **<u>Mrs</u> Ethel Biggs**

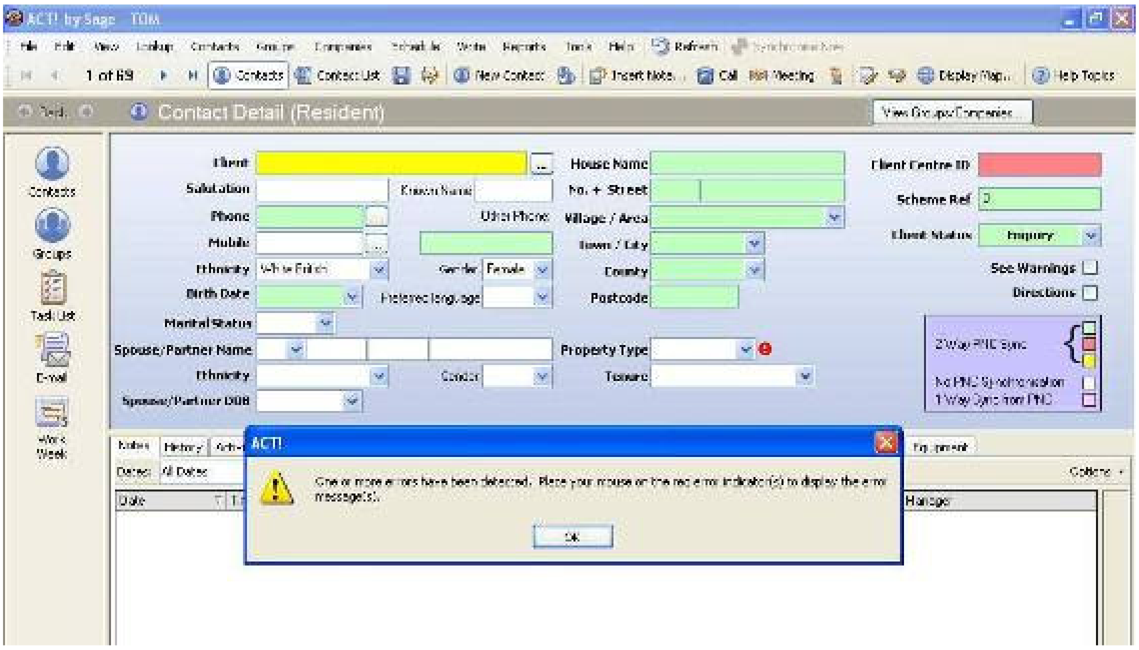
Completing the clients name correctly enables the salutation field to auto-complete correctly too.

You do not need to save a record after adding data; the software will do this automatically. However, if you miss out mandatory data an error message will flash alongside the missing field and the software will not allow you to continue. See illustration below.

Mandatory fields will have been specified by your administrator.

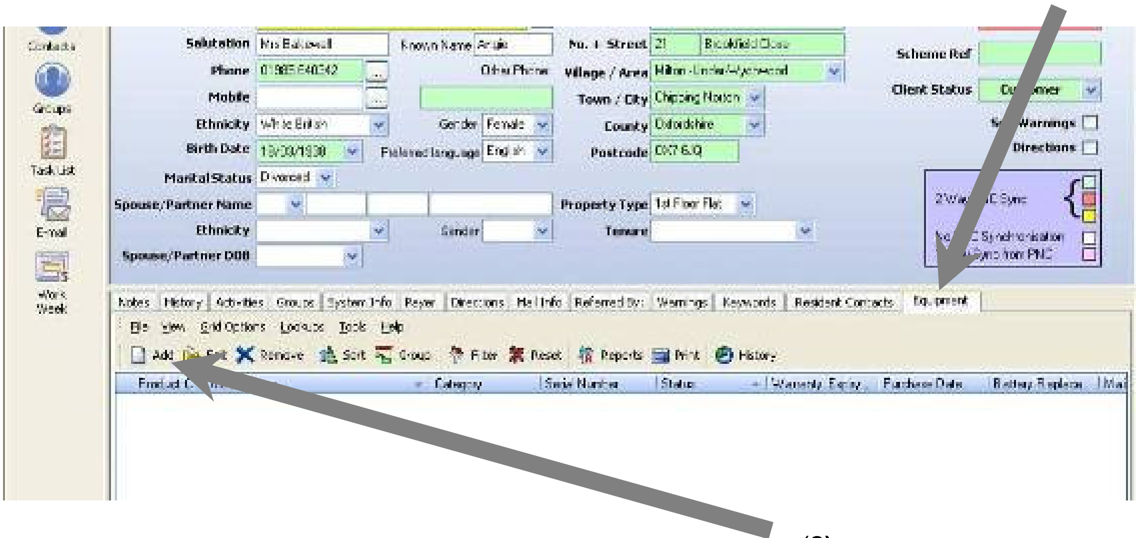
Cont/.d

The screen below shows a mandatory field with an error message for the missing entry.



Create a new Equipment Record

1. Choose the ‘Equipment’ Tab in the middle row of Tabs on your screen **(1)**



(2)

2. Choose ‘Add’ – the ‘Allocate New Equipment’ Screen will appear (See below)

3. Choose ‘New’ – the ‘Create Equipment’ Screen will appear

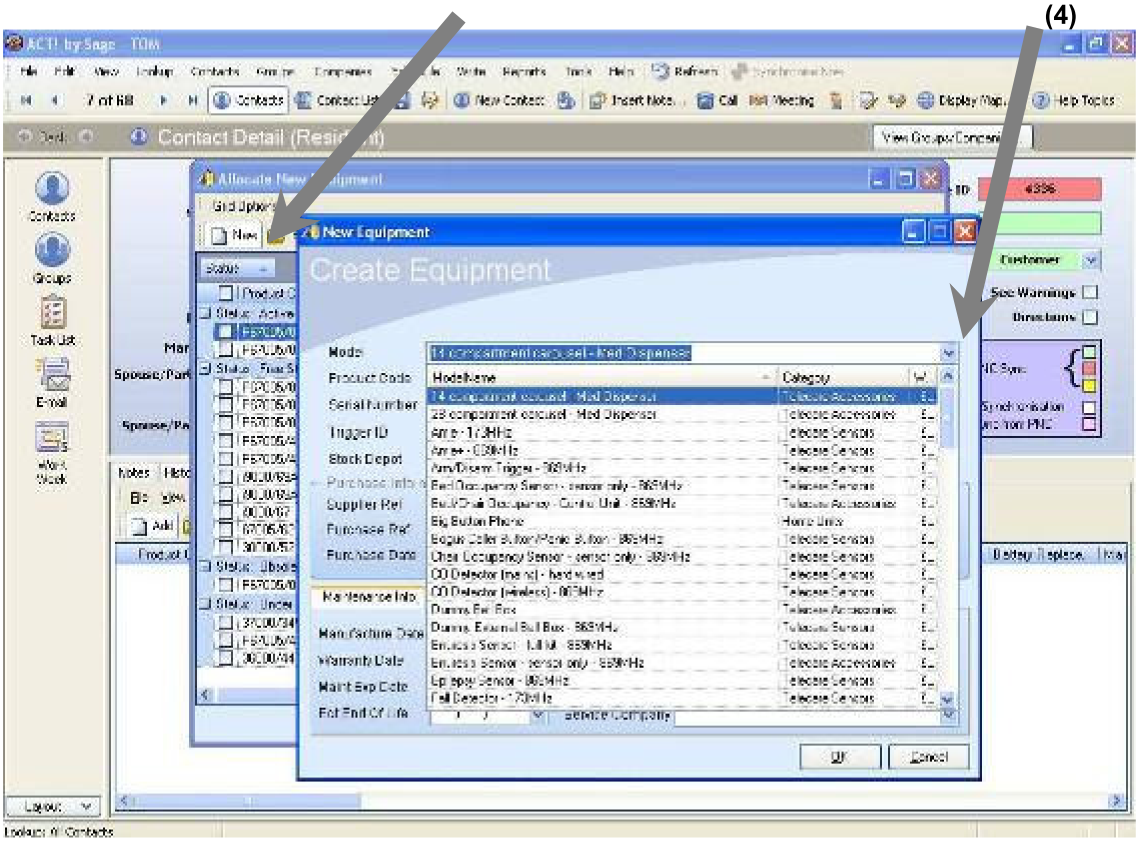
4. Illustrates the ‘Create Equipment’ Screen

Cont/.d

The screen below illustrates the creation of new equipment

(3)

(4)



To start entering a specific item of equipment, go to the drop down menu attached to the right hand side of the 'Model' field, select the required Model you wish to add and then complete the rest of the fields with the appropriate information from the piece of equipment you wish to add.

Click on 'OK' to complete the addition of your equipment to the main database.

Note:

This process does not add equipment to a client record; it adds it to your database READY for allocation to a client. The status of the item at this point will be 'Free stock'.

If you have a hand scanner, the serial number, manufacture date and other information will be added to the record as you scan from the unit.

See the section below for more detail.

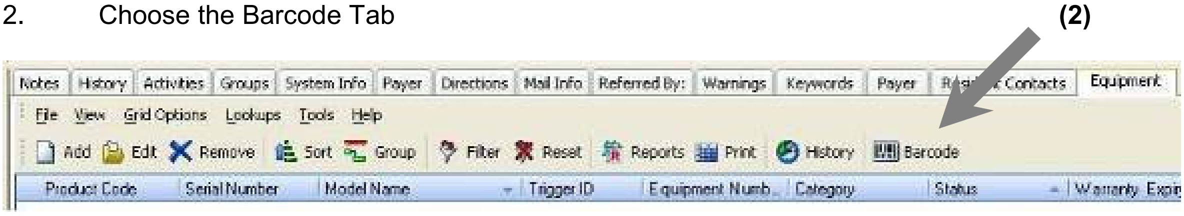
Create a new Equipment Record with Hand Scanner

All Tunstall products with a T symbol on the label are compliant with the TOM bar coding system. New equipment is also delivered with matching codes printed on the box outer to save opening all new equipment when entering stock.

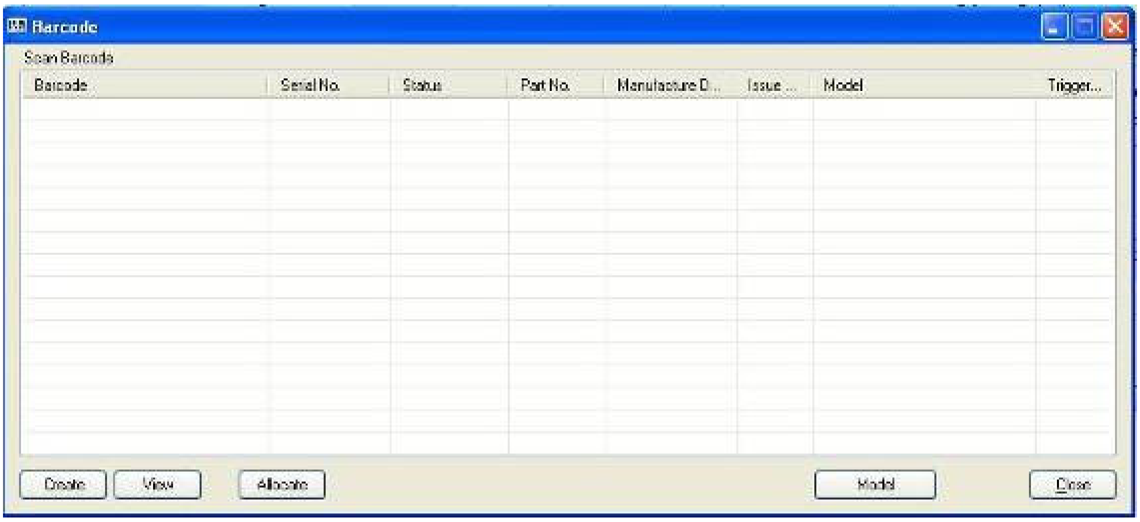
If a USB hand scanner is available for use then booking both new equipment and finding equipment records becomes very time-efficient.

1. Choose the 'Equipment' Tab in the middle row of Tabs on your screen in the same way as shown in the section above.

2. Choose the Barcode Tab **(2)**



3. The Scanning input screen will open as shown below

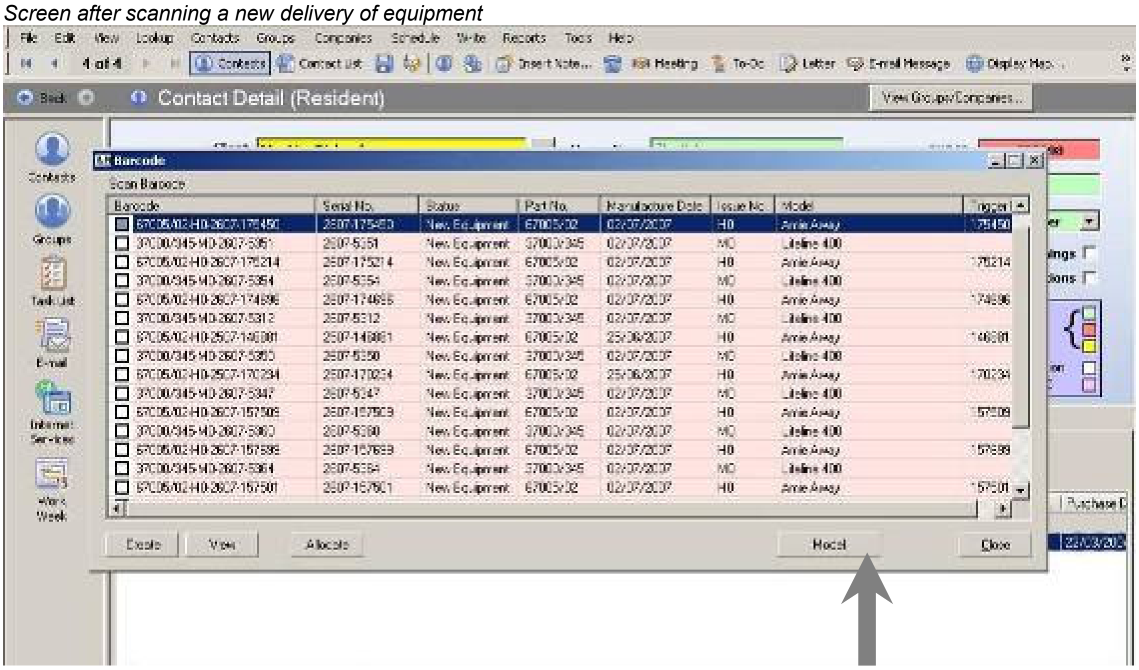


4. Any number of Tunstall products may now be scanned. The scanner will bleep every time it 'sees' a new barcode and automatically populates the screen shown above with new records shown in pastel pink. It will not duplicate equipment and is easy to use with a little practice.

5. When you have scanned all of your equipment your screen will appear as shown on the next page:

Cont./d

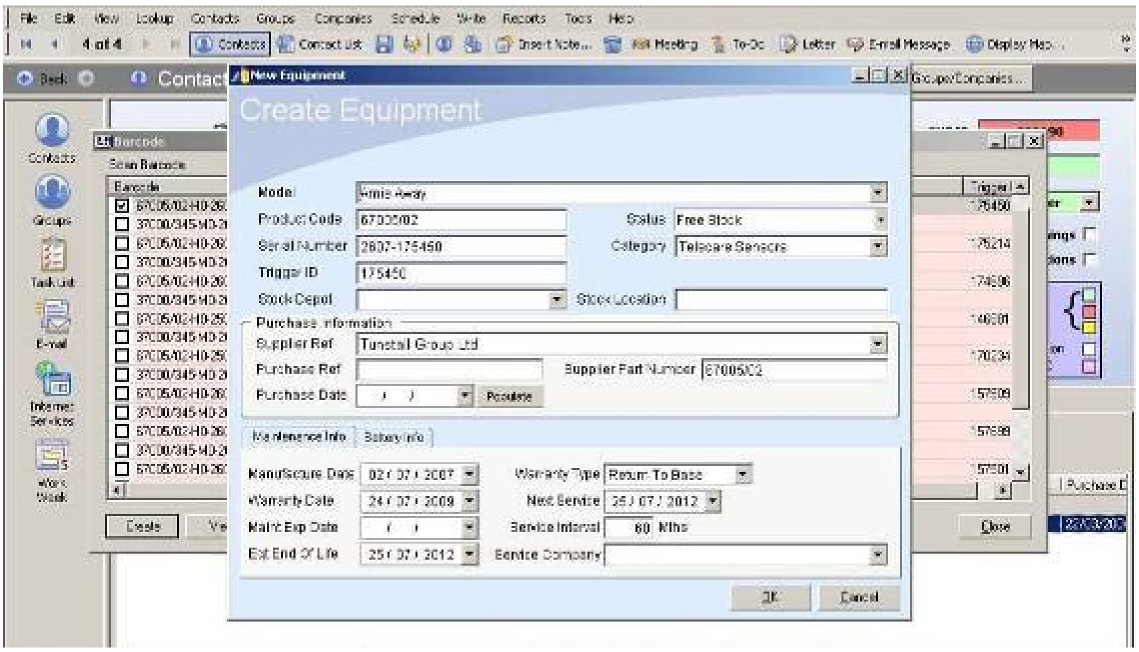
Screen after scanning a new delivery of equipment



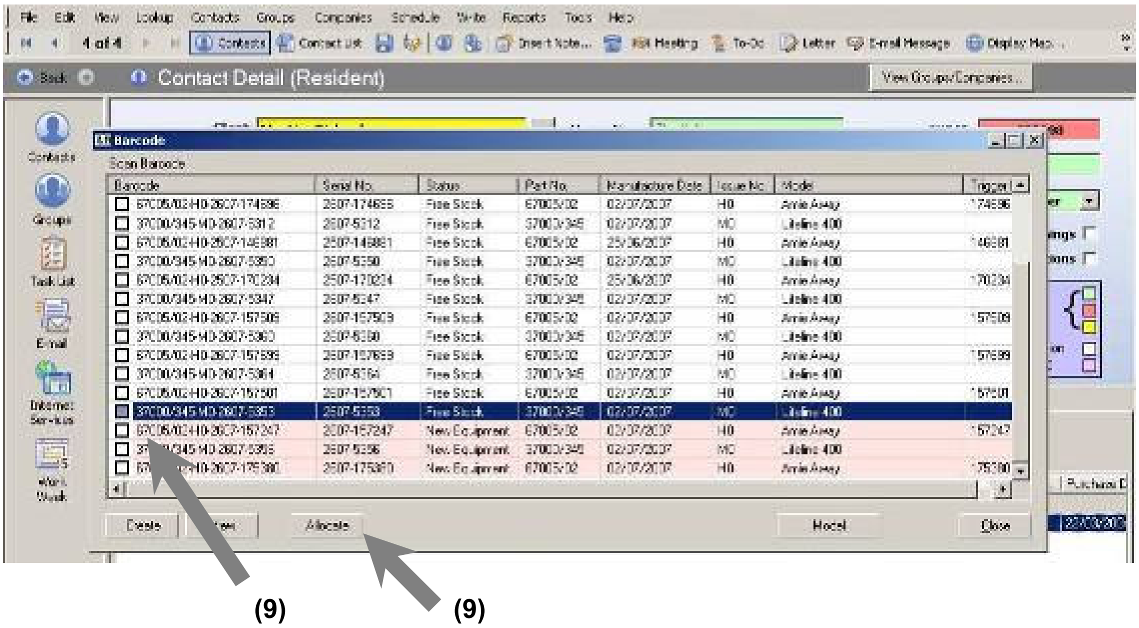
(6)

6. If a new product not yet set up within your 'model' list, the screen above will show NEW MODEL in the list. Clicking on Model will bring up the 'Edit Model Information' screen where the product information may be set up. Upon completion the screen will change to show your new model details.

7. To complete booking the new equipment into stock, double click on each record and complete the details that the scanner has not included in the new record. (Purchase date, Purchase Ref, Stock Location and Service Company), as shown below.



Cont/.d



8. Each new item is booked into your stock when the record turns white as shown on the screen above.

9. If you wish to allocate an item of equipment that has been scanned to a client, click on the square box at the left of the screen and choose the ‘Allocate’ button.

Note

The equipment ticked will be allocated to the client whose record TOM is placed on at the time.

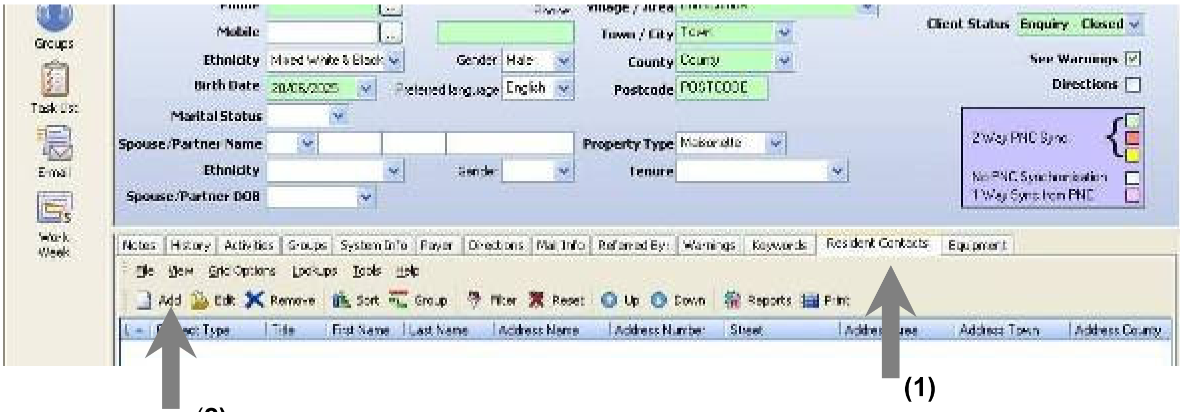
This function is very useful when booking equipment out for installation **but it needs to be used with care.**

Examples of the New Bar Codes

Note TOM compliance indicator

Create a new Emergency or Resident Contact

1. Choose the ‘Residents Contacts’ Tab in the middle row of Tabs on your screen

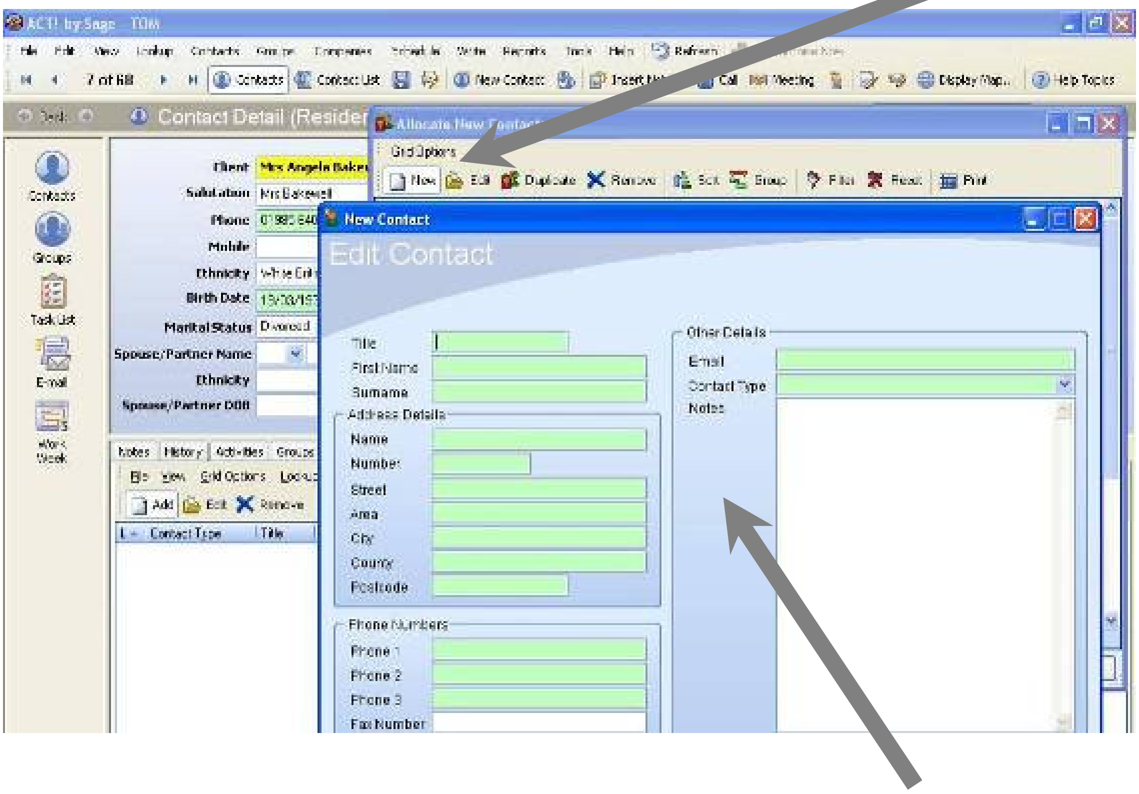


(1)

(2)

2. Choose ‘Add’ – the ‘Allocate New Contacts’ Screen will appear

3. Choose ‘New’ – the ‘New Contact’ Screen will appear (3)



4. Enter or edit the details of a Resident’s Contact here. (4)

Note:

This process does not add an Emergency Contact to a client’s record it adds it to your database READY for allocation to a client(s).

Emergency Contacts, once entered are available to be allocated to **multiple** clients. E.g. a Doctor may server a large number of clients.

Create a Group

Groups and *subgroups* are collections of clients with something in common. For example, you might want a group of all of your clients that live in a specific area and a subgroup of clients that also live in a specific village within that area.

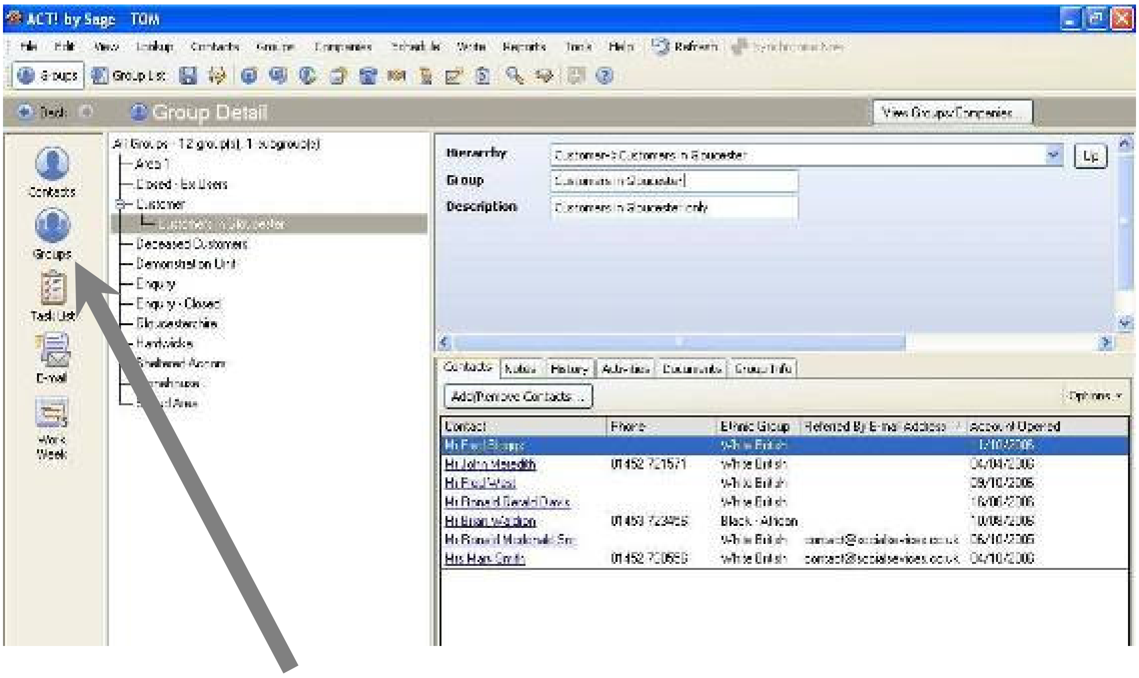
Groups can be up to 15 levels deep. The Groups tree displays the hierarchy of available groups and subgroups.

1. You create and manage groups in the Group Detail view. The Group Detail view has many of the same features as the Client Detail view. The Group Detail view also contains tabs for inserting or viewing notes, documents, histories and activities with the clients that are group members.

You can also use the Groups tab in the Client Detail view to see which groups the client is a member of. You can add clients to groups from this tab as well.

Groups can be created by saving a lookup as a group. (See Find a Client on Page 14)

If you wish to create your own groups, please refer to the Help screens or ask your administrator for assistance.



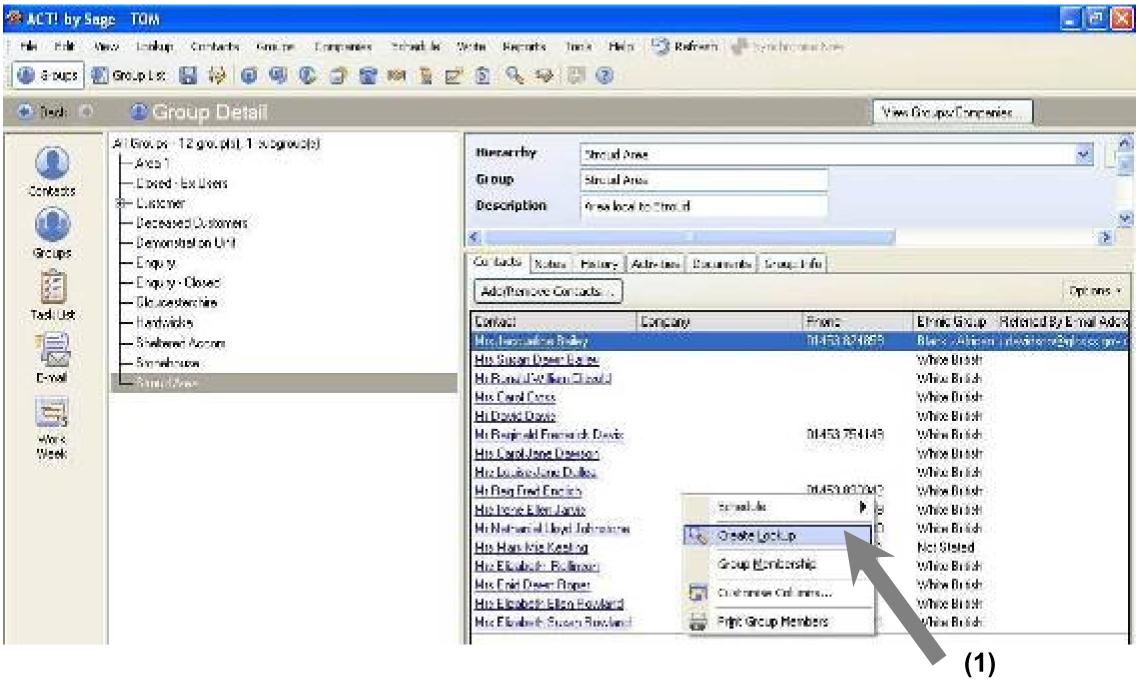
(1)

The software also allows specific criteria to be set up so that if a new or changed record falls into the criteria for a group or sub group, the software will automatically add them without the user having to manually add them.

Create a 'Lookup'

'Lookups' enable you to create a subset of people in your database that also fit a criteria of your choice in the same way as a Group. However they also enable you to exclude or add other people temporarily. It may be that you want to send a letter to a subset of a group or just easily view a list of people.

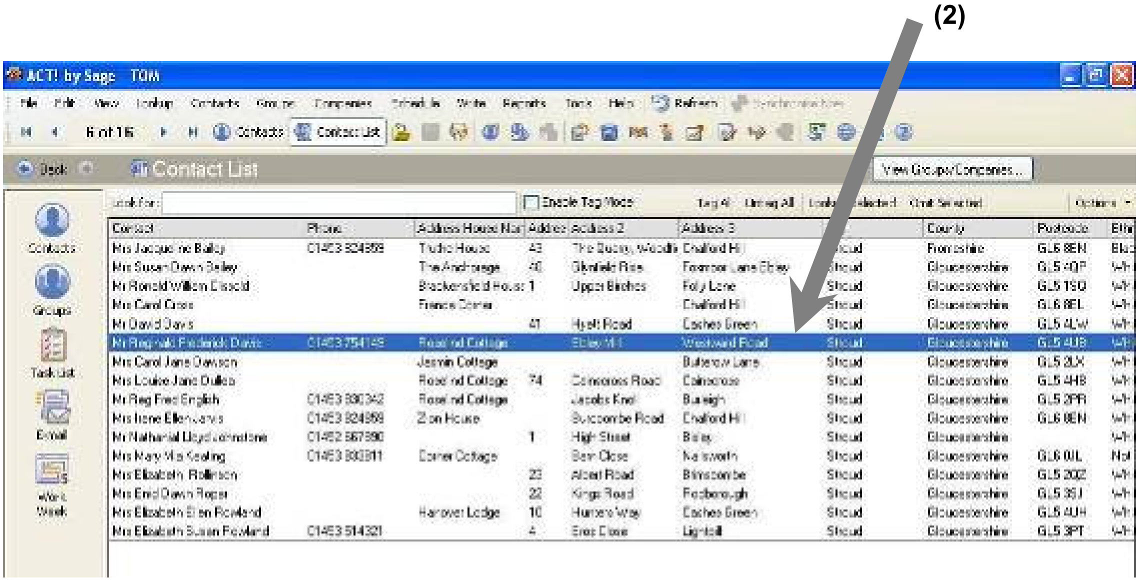
1. From the 'Groups' page, select your initial group and then right click anywhere amongst your existing list of names as shown below.



(1)

2. The group of people will then be presented to you in a list view. From this you can highlight a selection of people and choose to omit or select them. You can also 'tag' them for editing or to write to them.

(2)



To exit from the subset of clients held in your Lookup you MUST click on Lookup in the top menu and choose 'All Contacts'.

Write a Letter

1. Firstly select the client you wish to write to. See section on 'Find a Client'.

2. Right click after placing your mouse anywhere in the blue part of your screen and select 'write'

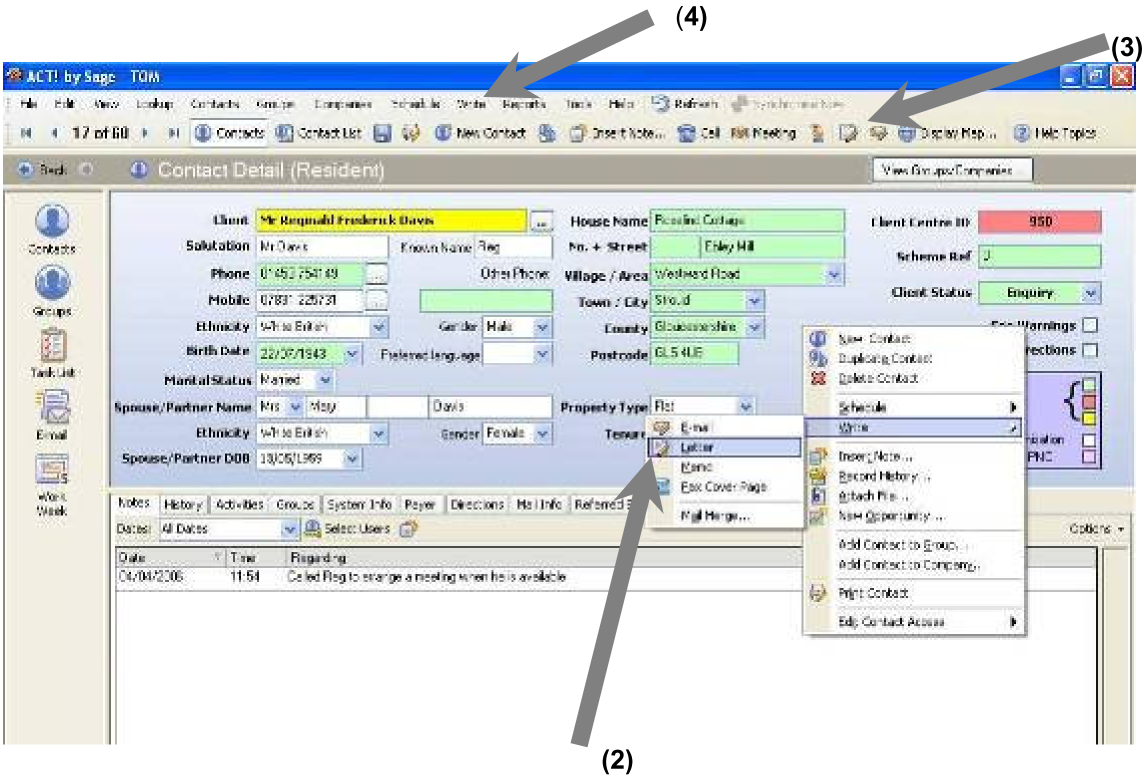
OR

3. Click on 'Letter

OR

4. Select 'Write' followed by 'Letter on the top toolbar of your screen

Microsoft Word will then start up and populate the name and address of your client in readiness. It will also complete the current date and a signature area for you. You can then type your text.



When your letter is finished, go to file and print from MS Word in the normal way. A screen will appear asking if you wish to record a history of this letter with the Clients details. We recommend that you say 'yes' and that you provide a brief description followed by a tick in the box 'Attach Document to History'.

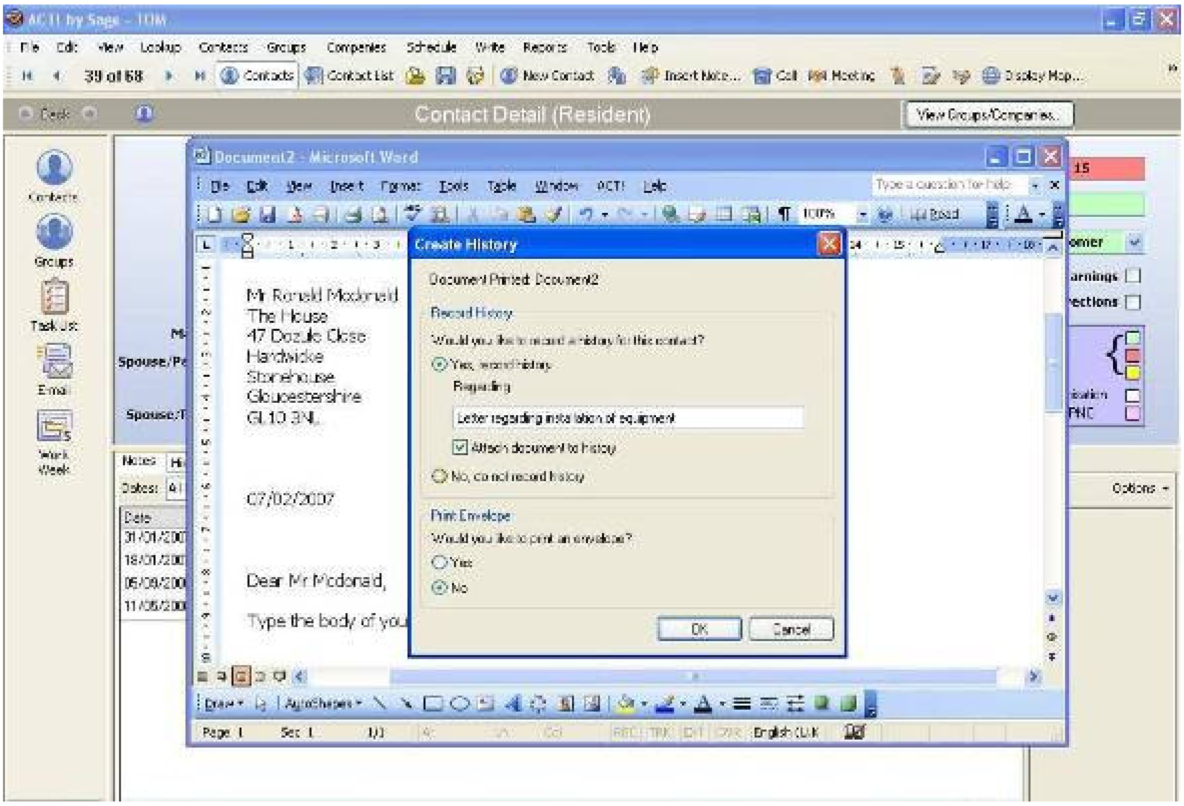
After you have clicked 'OK' to confirm, the software will ask you for a file name in the usual way.

You will also have the option to print an envelope directly too. Word will then close.

The document may then be retrieved by all users at any time by simply clicking on the document icon within the 'History' Tab when within the client record.

Cont/.d

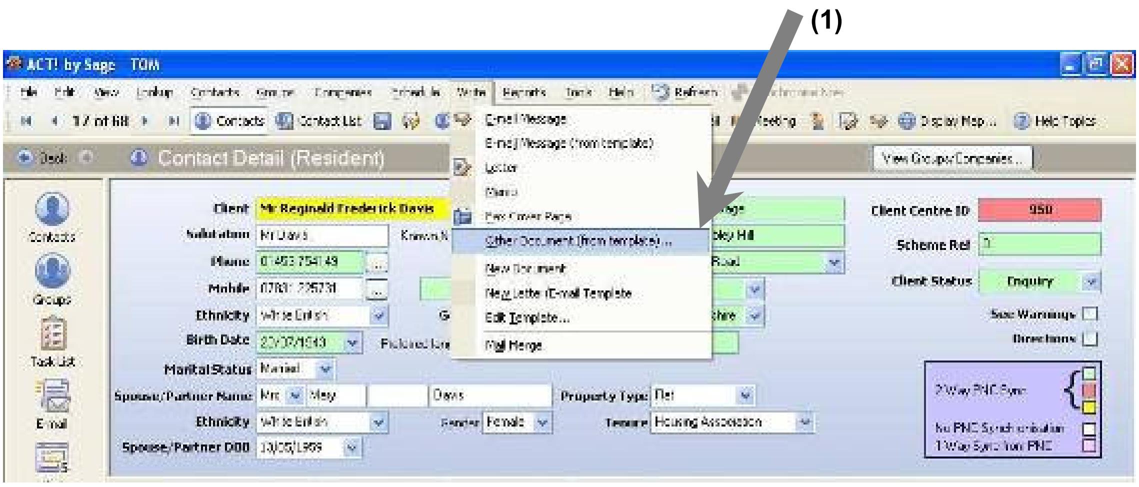
Please see the image below to view the appearance of the Document recording screen.



Write a Letter from a Template

TOM provides the opportunity to send out ‘standard’ letters from templates designed by your administrator. These could be anything from VAT Exemption forms to Client Contracts, Referral forms or Assessments.

1. The procedure is the same as shown above except they may only be selected by choosing ‘Write’ from the top Toolbar and then opting for ‘Other Document’.



Mail Merge / Design Document Templates

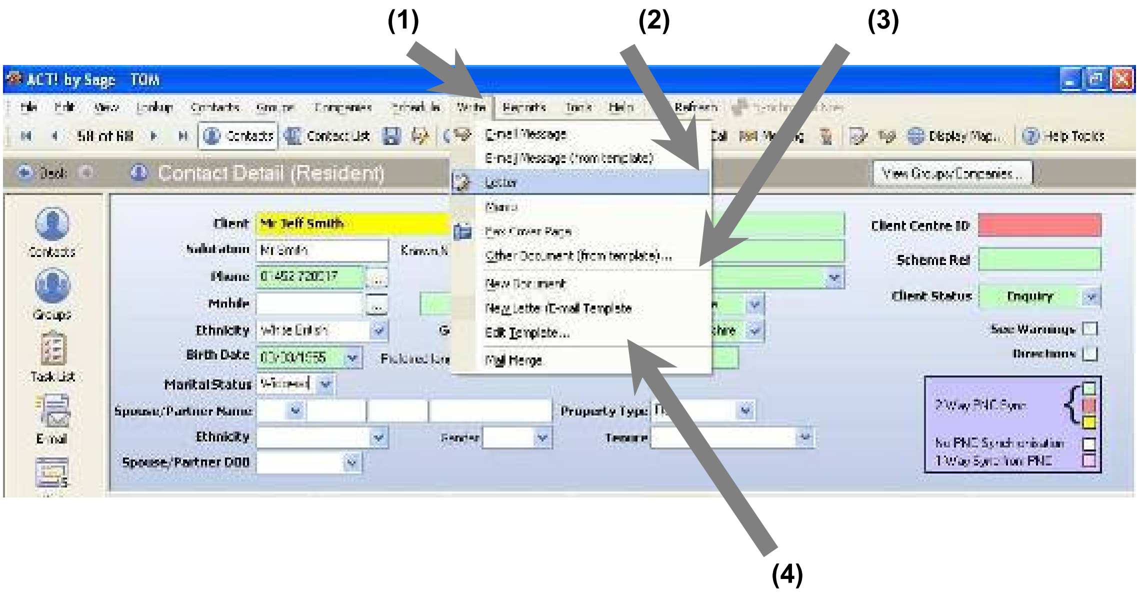
TOM enables you to write your own letters/Memo to your clients and colleagues or to use pre-formatted templates designed in Word.

1. To write a Pre-addressed letter or memo click on ‘Write’ to open the options menu

2. Choose your option of ‘Letter’ or ‘Memo’.

Microsoft Word will start and provide you with a pre formatted document ready for your content.

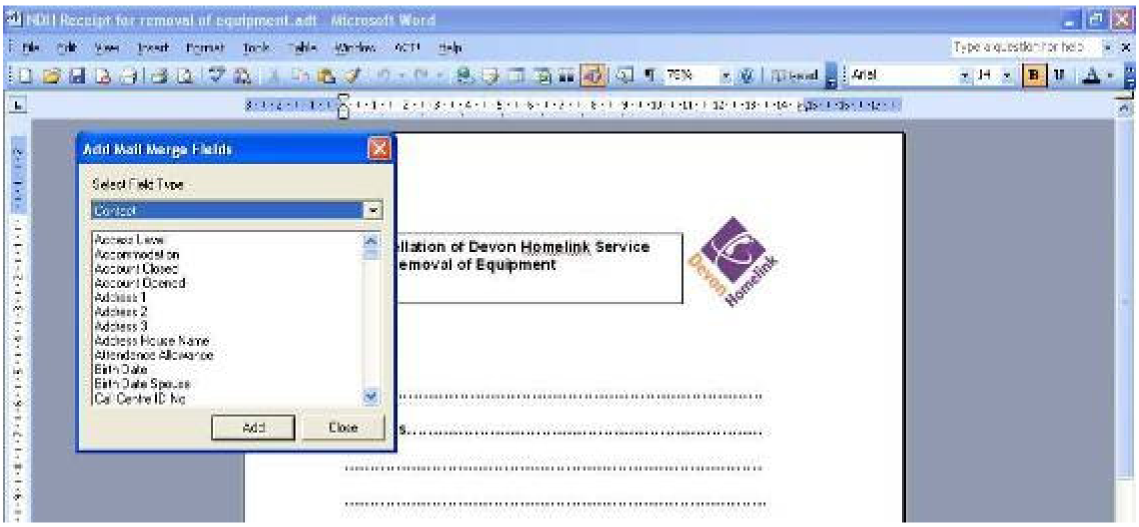
3. To choose a templated document select ‘Other Document’ and choose from the list of files available.



Note:

You can add new templates by clicking on ‘Edit Template’ or ‘New Letter/E-Mail Template’ and then using your MS Word skills to design a template of your choice. (4)

Any field from TOM can be added to a document in Word as shown below.



Allocate Equipment to a client

Important Note: The status of a client must be 'Customer – Current User'.

The software will not allow you to allocate Contacts to a client with the status of 'Enquiry'. (Or any other status).

1. To allocate an item of equipment to a customer, find the relevant client first and then select the 'Equipment' Tab

   Choose 'Add' from the menu bar and after finding the correct item of equipment listed in your database:

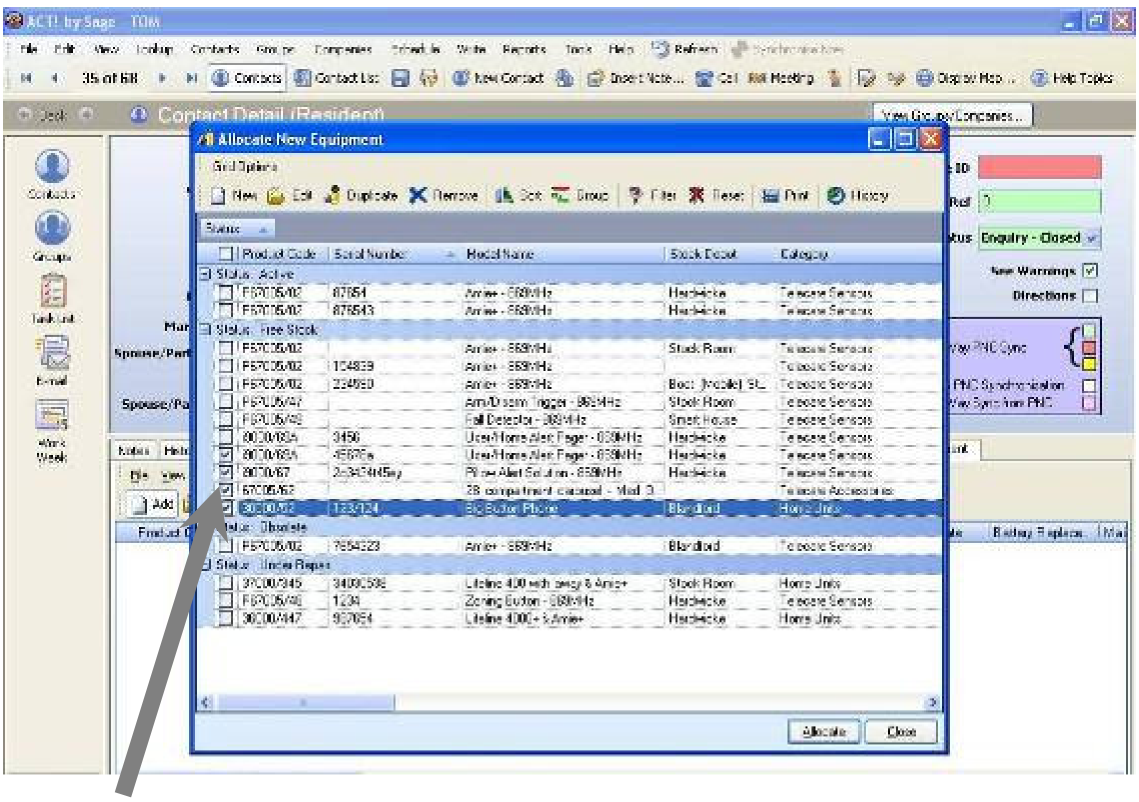
2. Place a tick in the status box on the left hand side of the record

3. Click on 'Allocate' at the bottom of your screen and the screen will close having attached the chosen item to your client record. (After showing a confirmation message which you must OK).

Note:

The status of the equipment will automatically change from 'Free Stock' to 'Active'

1. Multiple items may be allocated by choosing and ticking each item of equipment installed before clicking on 'Allocate'.



(1)

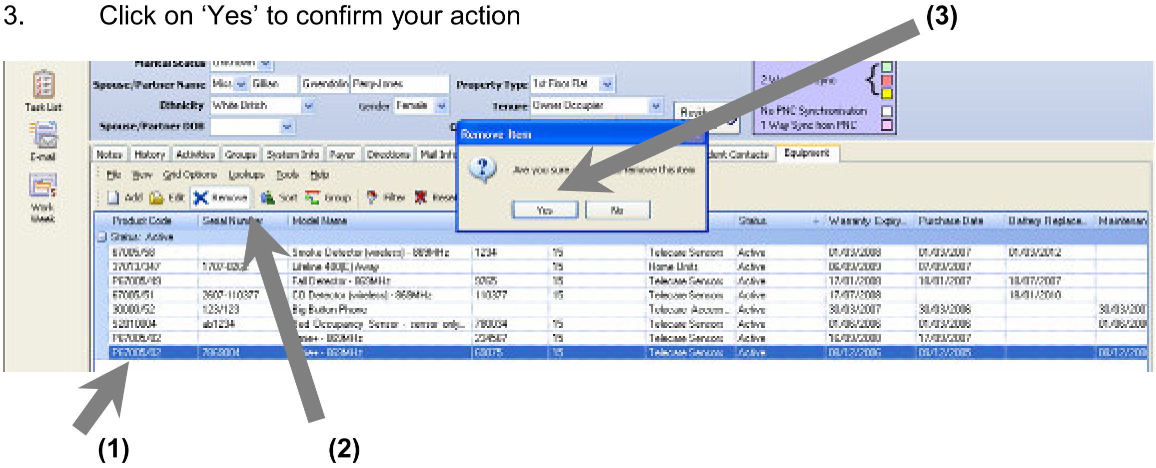
Remove Equipment from a Client

To remove an item of equipment from a resident, first find their record and choose the Equipment Tab.

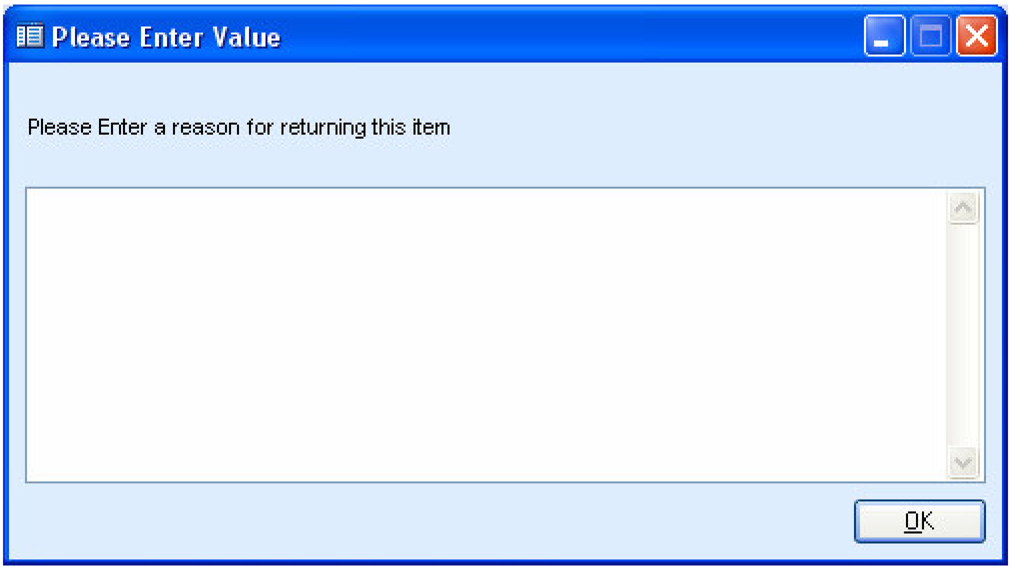
1. Highlight the item of equipment to be removed

2. Click on ‘Remove’

3. Click on ‘Yes’ to confirm your action



You will then be asked for a brief reason why the equipment is being removed as shown in the pop up screen below. After entering the reason say ‘OK’



The equipment item will then be removed from the client record and returned to free stock ready for allocation to another client.

Note:

TOM automatically records the allocation of the equipment to the client together with the original allocation date and the return date.

If the equipment is not to be returned to Free Stock e.g. faulty, it must be located and the status changed manually.

Allocate a Resident Contact to a Client

Important Note: The status of a client must be ‘Customer – Current User’.

The software will not allow you to allocate Contacts to a client with the status of ‘Enquiry’. (Or any other status).

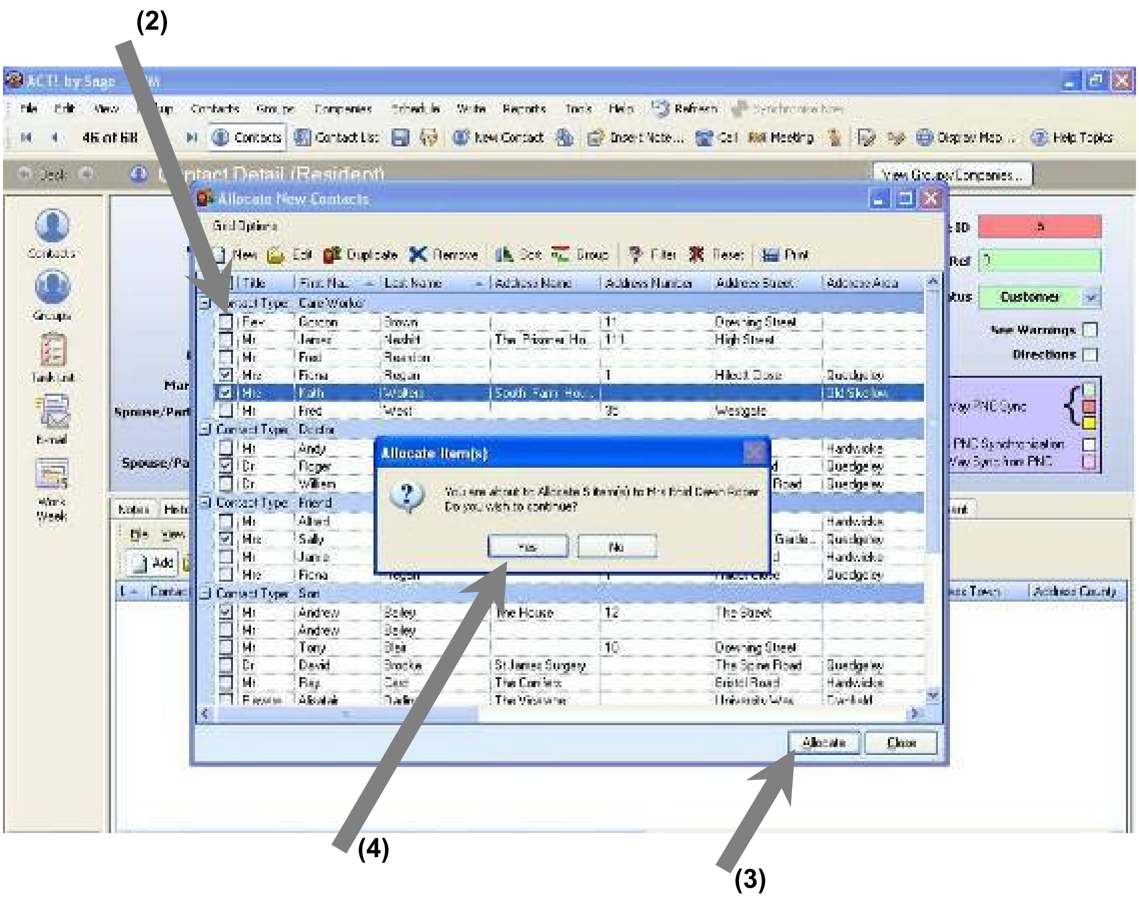
1. To allocate a Contact to a customer, select the ‘Resident Contacts’ Tab

   Choose ‘Add’ and, after finding the correct Contact(s) already listed in your database:

2. Place a tick in the status box on the left hand side of the contact record(s)

3. Click on ‘Allocate’ at the bottom of your screen and a confirmation screen will pop up

4. Confirm your allocation by saying ‘Yes’. The screen will then close having placed the contact(s) in your client record.



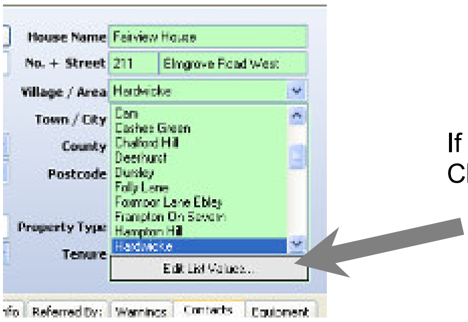
Note:

Multiple Contacts may be allocated by choosing and ticking each Contact before clicking on ‘Allocate’. The screen above shows the confirmation message before saving.

Drop Downs – Edit List Values

TOM has been designed to make data entry as fast as possible. A number of Drop down Boxes have been included to assist this. Whenever an entry is already included in the drop down list, the software will anticipate your choice and auto-complete your entry.

If your choice is not available, the majority of the drop downs enable you to ‘Edit List Values’. (You must contact your administrator where this option is not available).



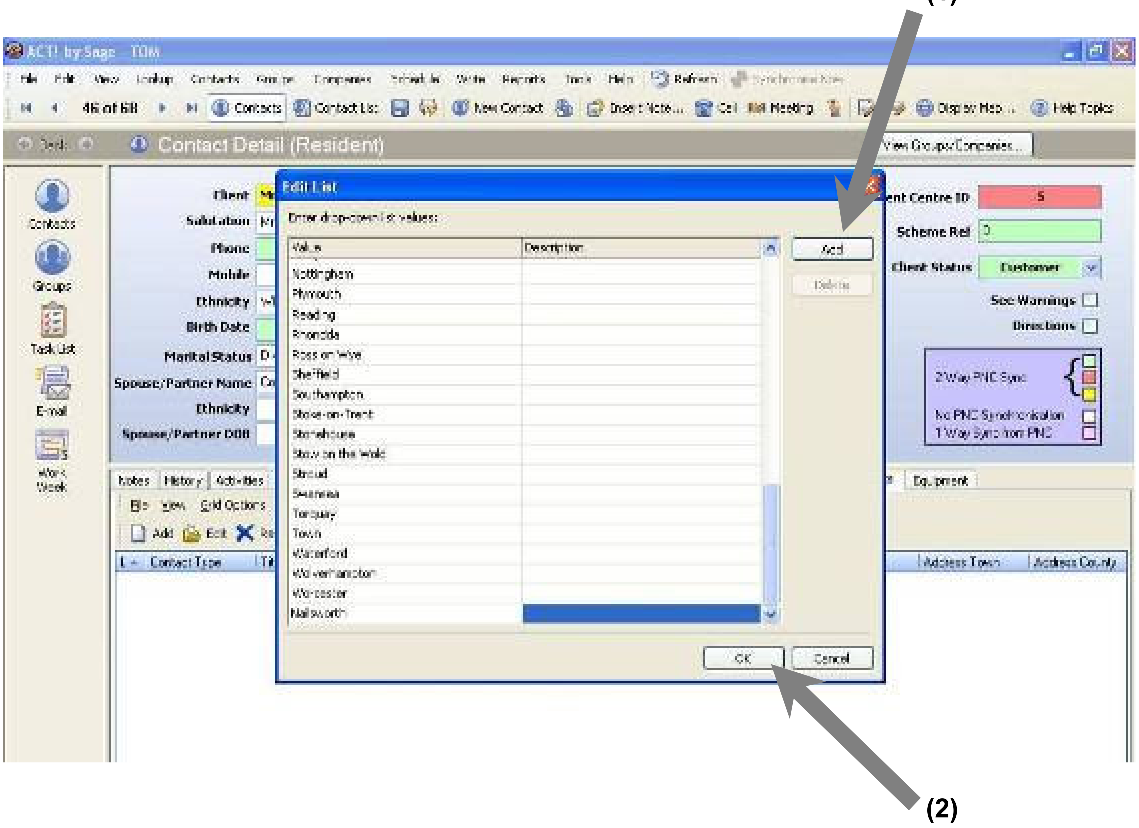
If you wish to add an extra entry to a drop down box, Click on the ‘Edit List Values’ box.

A new entry will be made available within an edit screen as shown below.

1. Click ‘Add’ - You can then type in your new entry together with a description, (if required).

2. Click ‘OK’. The new entry will be added to your drop down box.

(1)



(2)

Make a Client Note

The Notes tab displays all the notes inserted for a client, or group. Notes are details about conversations, financial information, and other types of information you want to keep track of for the client or group. All notes show which user created the note.

To insert a note:

Choose the 'Notes' Tab after selecting the client record you wish to associate with the note.

1. Right click after placing your mouse anywhere in the blue part of your screen and select

<u>OR</u>

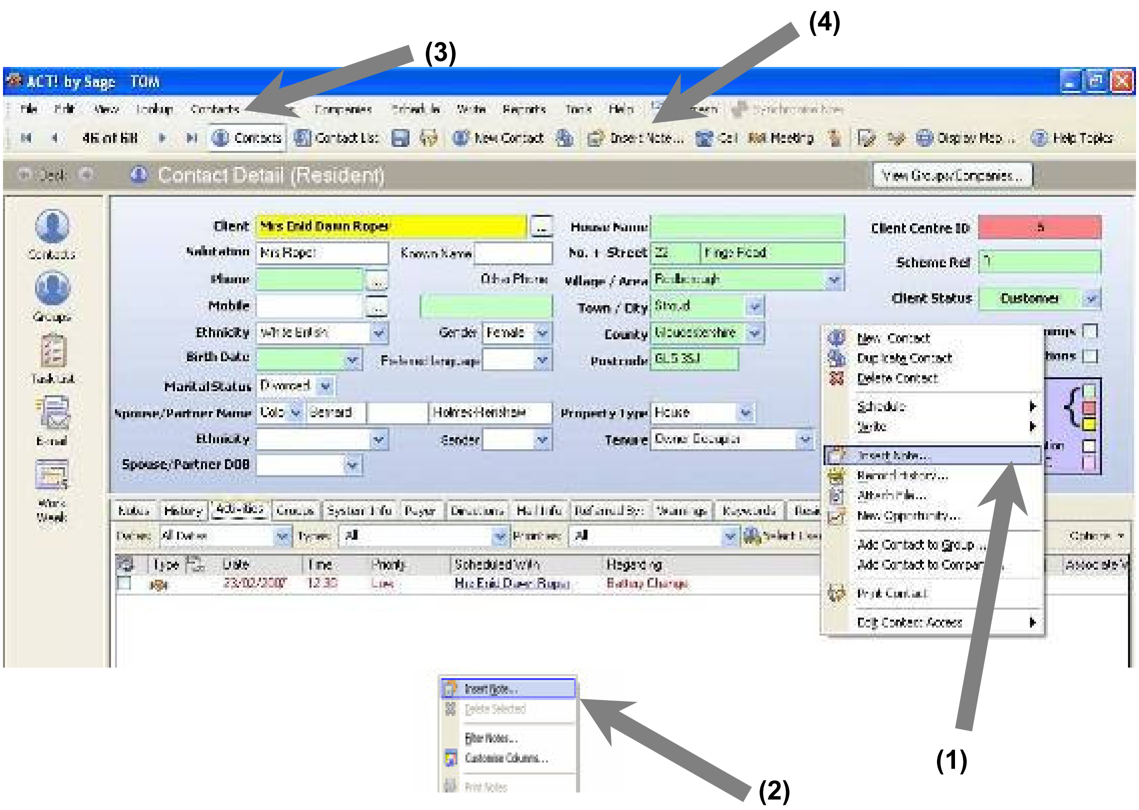
2. Right Click anywhere in the notes area of the screen

<u>OR</u>

3. Select 'Contacts' followed by 'Insert Note' on the top toolbar of your screen

<u>OR</u>

4. Left click on the 'Insert Note' Icon



Cont/.d

See further down this page for an example of the ‘Notes’ Screen.

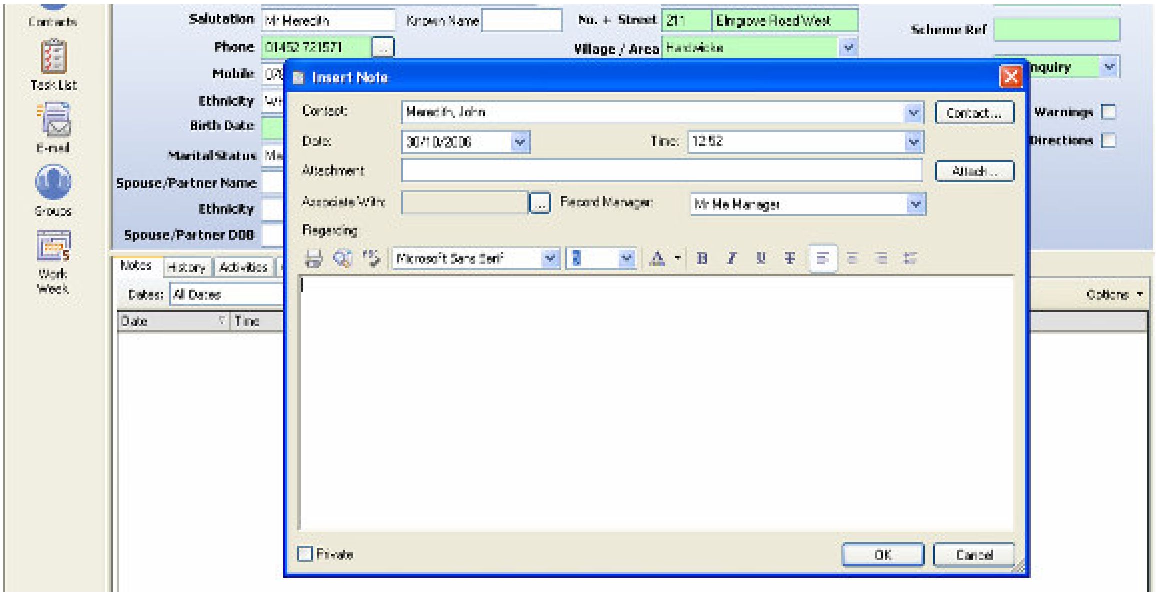
Notes are completely free text.

A spell check facility is available and you may format the content using icons similar to those in Word.

Other computer files such as scanned copies of documents may also be attached to the note. To do this, click on ‘Attach’ and then choose your file, (of any type), from the folder menu that is subsequently shown on your screen.

This is a good way of ensuring documents and files are easily found in the future because all associated files are easily accessed from the client record.

If you have remote users of TOM, they too will be able to retrieve these documents and files, no matter where they work from.

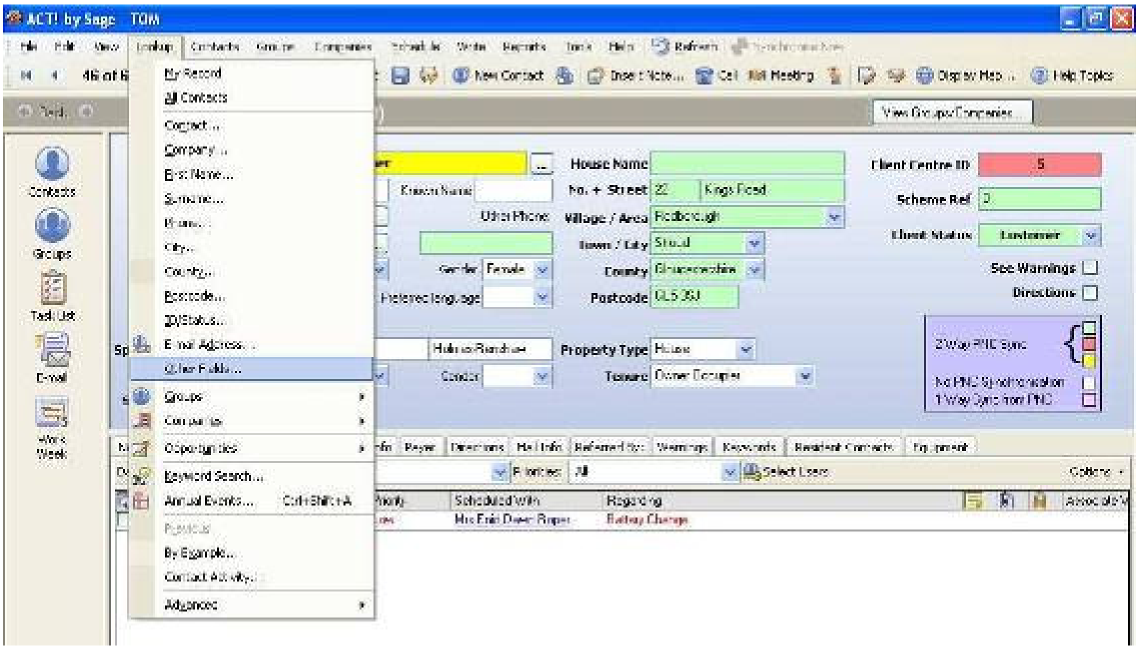


Note:

The use of ‘private’ notes is to be avoided because no-one else (other than an administrator), will be able to see them.

Find a Client

To find a client choose ‘Lookup’ from the top tool bar.



You can search by any of the following:

Contact	The full name of the client (remember to include their title Prefix)
First Name	Forename
Surname	Surname * * **Most common means of searching**
Phone	Full STD Number
City/Town	Town Field
Postcode	Full or part Postcode
ID/Status	Any item in the drop down list

Note:

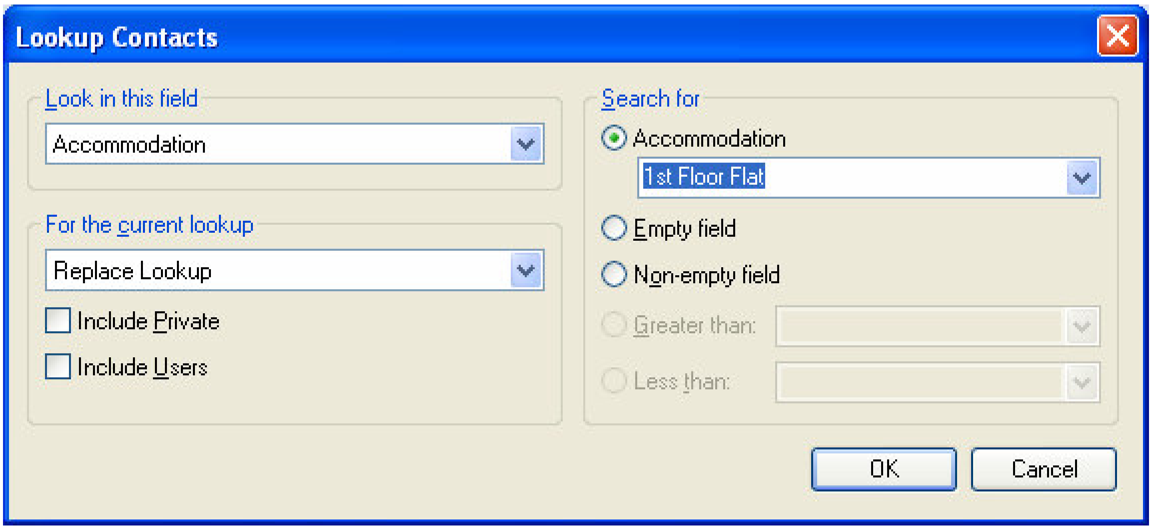
You can also search by any field in the database as shown in the above screen shot. When using this method, place your mouse and click into the field of your choice before telling the software to Lookup the field required.

After selecting your search method a further screen will open. Input the criteria required and click OK.

The search will return a list of clients matching the criteria you requested in an easily read tabular format.

See screen shot below

Cont/.d



Important Note:

After you have completed your search and the work you need to complete, ALWAYS return to 'Lookup' on the top toolbar and click on 'All Contacts'

The reason for this is that TOM retains the content of your search criteria until you tell it not to.

Tip

Try using the first few characters of the search you require. This will ensure you catch all possibilities and will always produce a short list that you can then select from easily.

Note:

You can search by any field in the relevant database. If you place your mouse and click in the field of your choice before telling the software to Lookup the field required it will automatically populate 'Look in this field'.

Find a Resident Contact

To find a Resident Contact in your database, first choose the ‘Resident Contacts’ Tab.

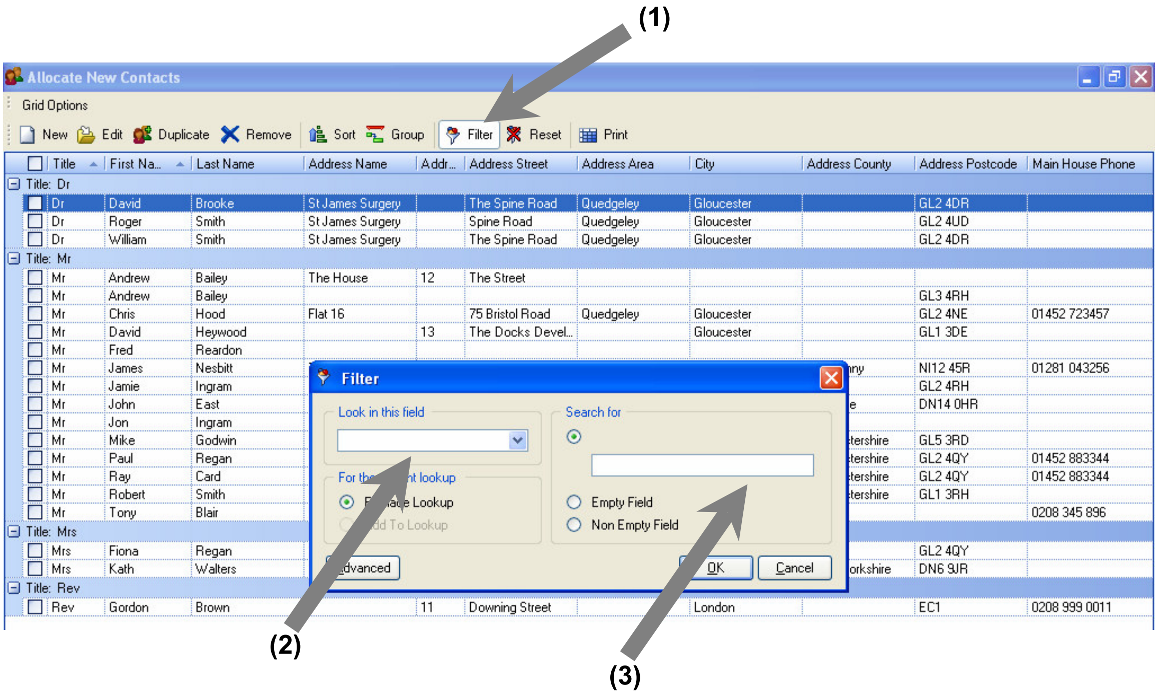
Choose ‘Add’ so that you can view the complete list of Contacts already entered.

1. Click on ‘Filter’

This will open your search screen where you can:

2. Enter which field you wish to search by selecting from the drop down box

3. Enter the criteria of your search



Tip

Try using just the first few characters of the search you require. This will ensure you catch all possibilities and will always produce a short list that you can then select from easily.

Setting a Default Search

Within the Resident Contacts (or Equipment) Tab you can set the default search to suit your most common or regular search criteria by moving the required field to the left of the screen.

Just grab the field on the title bar and drag it over any other titles until is the first field on your screen. In the image below, Forename is being dragged to a new position for search purposes.

Find Equipment

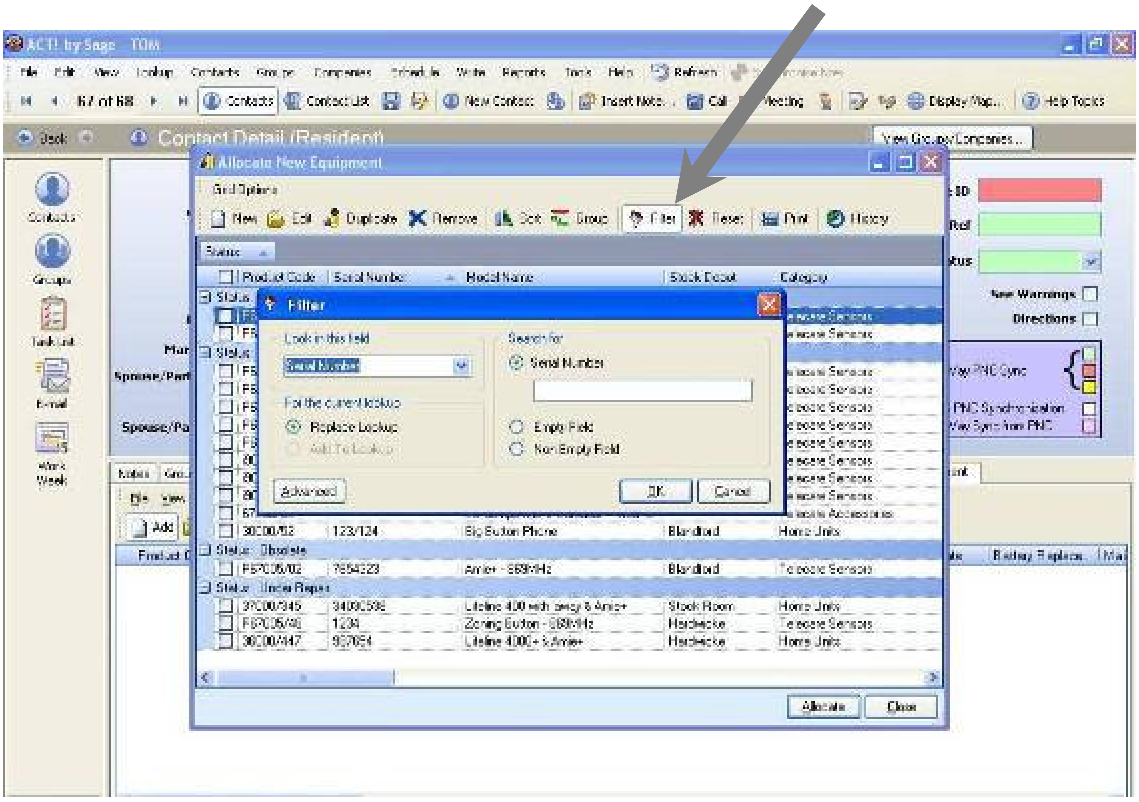
To find Equipment in your database, first choose the ‘Equipment’ Tab.

Choose ‘Add’ so that you can view the complete list of Equipment already entered.

1. Click on ‘Filter’

This will open your search screen where you can enter which field you wish to search together with the criteria of your search.

(1)



Tip

Try using the first few characters of the search you require. This will ensure you catch all possibilities and will always produce a short list that you can then select from easily.

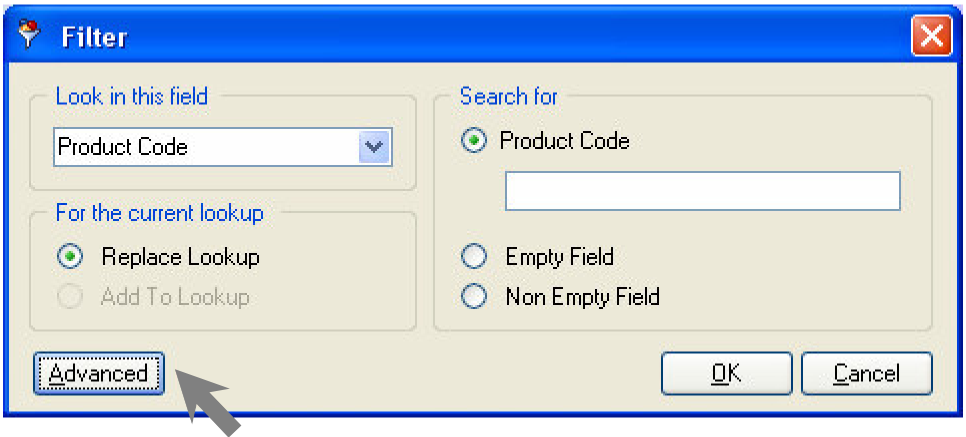
Note:

You can search by any field in the relevant database. If you place your mouse and click in the field of your choice before telling the software to Lookup the field required it will automatically populate ‘Look in this field’.

Advanced Search System (Equipment)

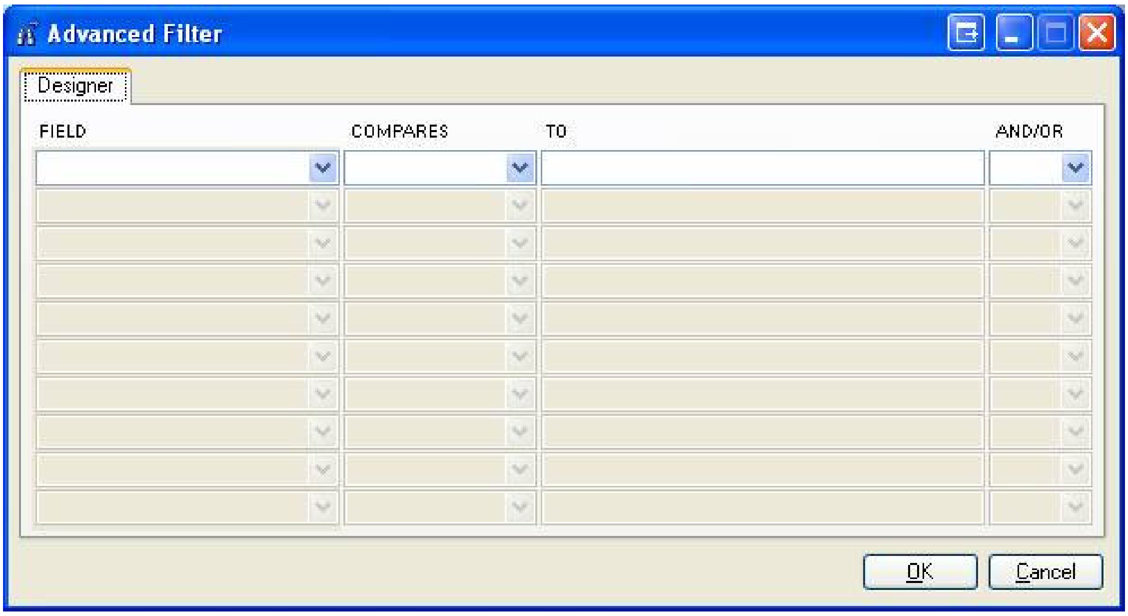
The advanced search facility within TOM allows a user to search for multiple items of equipment at once without the need to repeat searches when allocating or locating items of stock. It has been provided to save time.

1. After applying a simple search as in the section above (Find Equipment), click on the ‘Advanced’ Button



(1)

The Advanced Filter screen then appears as shown below.

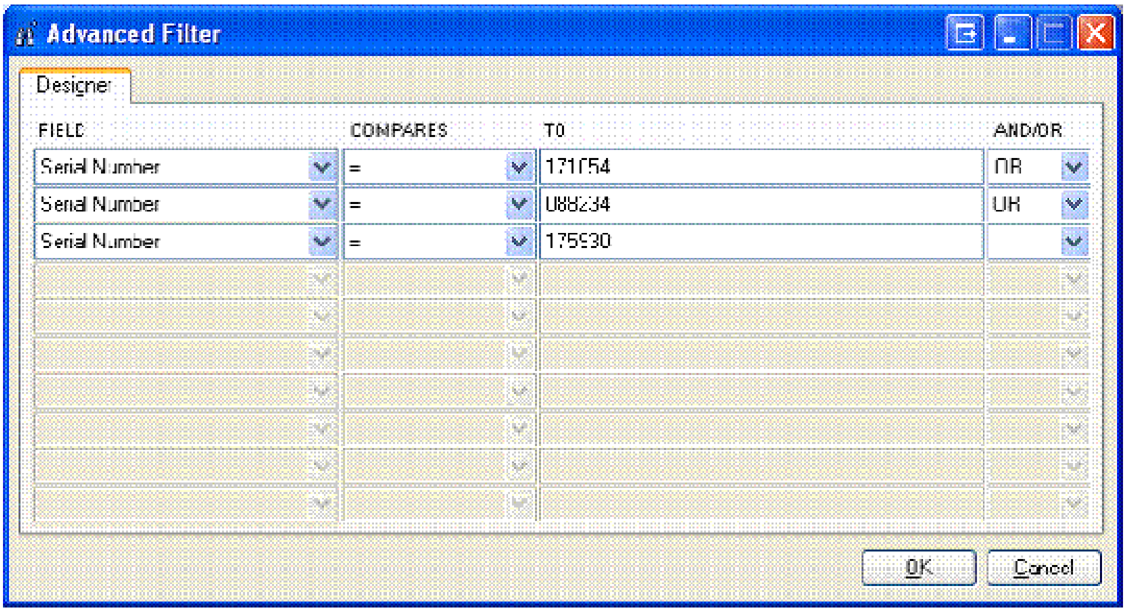


To find multiple items:

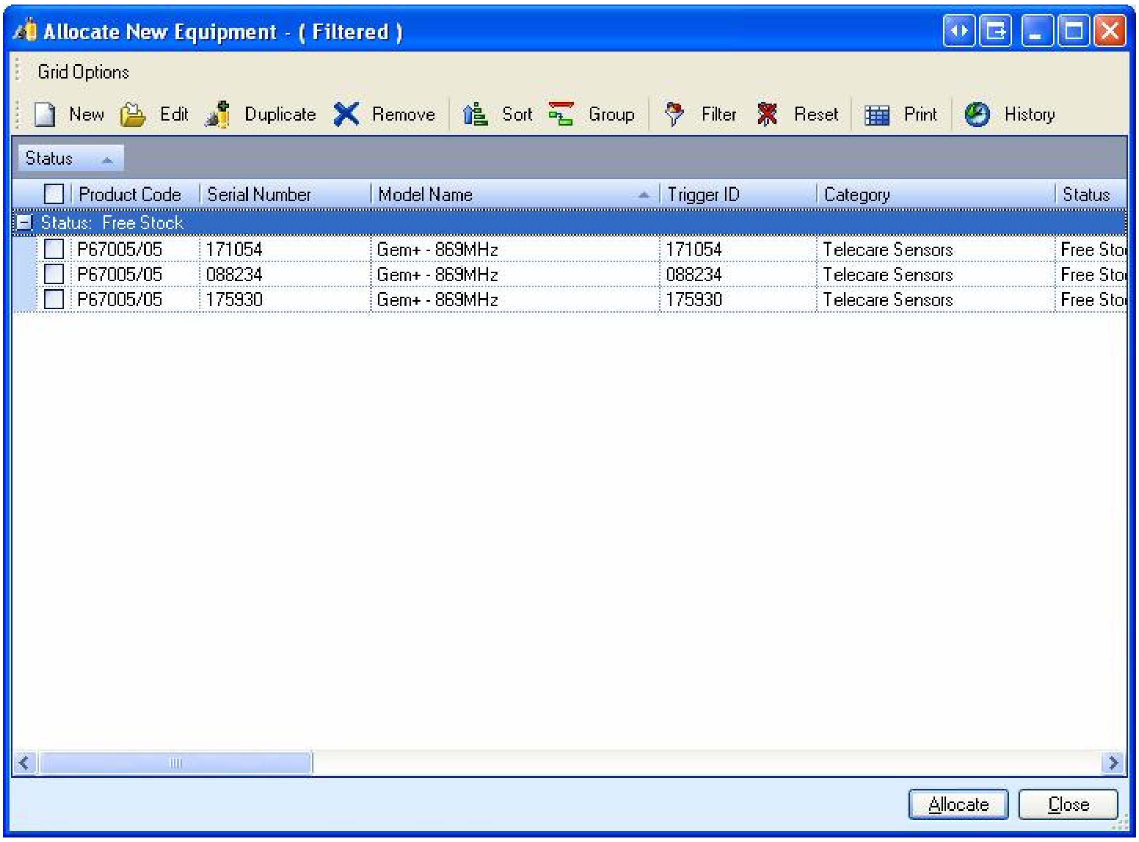
Populate the ‘Field’ Box with the parameter with which you wish to search e.g. Serial Number
Populate the ‘Compares’ Box with =
Populate the ‘To’ Box with the actual Serial numbers of the equipment
Populate the ‘And/Or’ Box with OR

Cont./d

The image below shows a completed screen as per instruction on page above.



Press OK and you should find only these items appear in the Add Equipment screen.

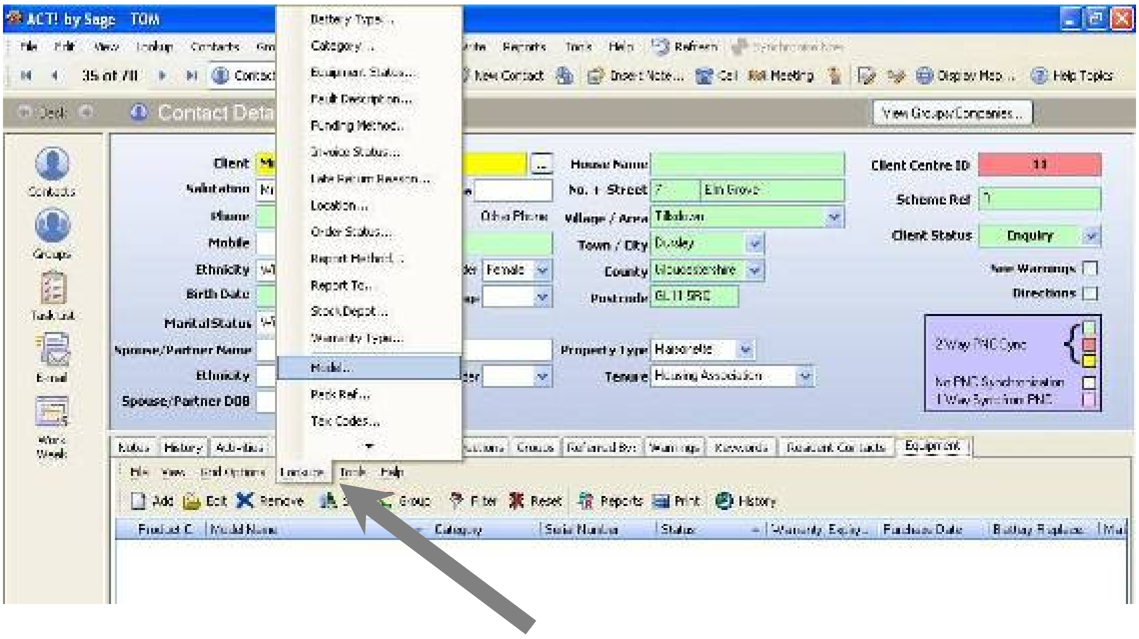


Each of the items can then be swiftly ticked and allocated to the client.

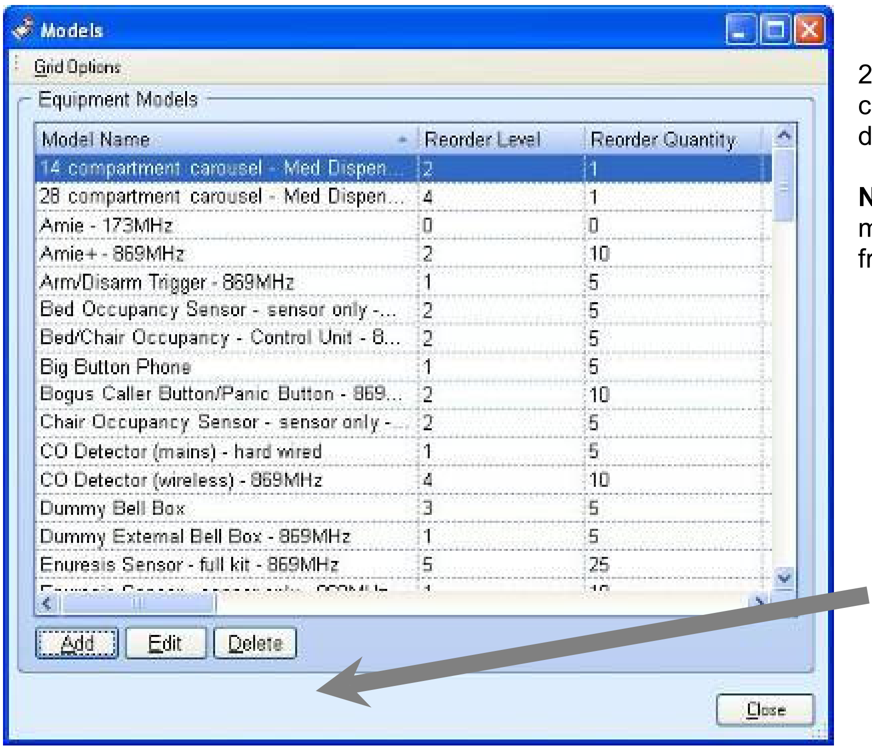
Ordering Equipment

Your Administrator or Stock Controller will have entered the minimum amount of stock they wish to have available for any product together with the amount of each product they wish to order at any time.

1. You can review these Re-order quantities and minimum stock levels by choosing the Equipment tab followed by 'Lookup' and 'Model'.



(1)



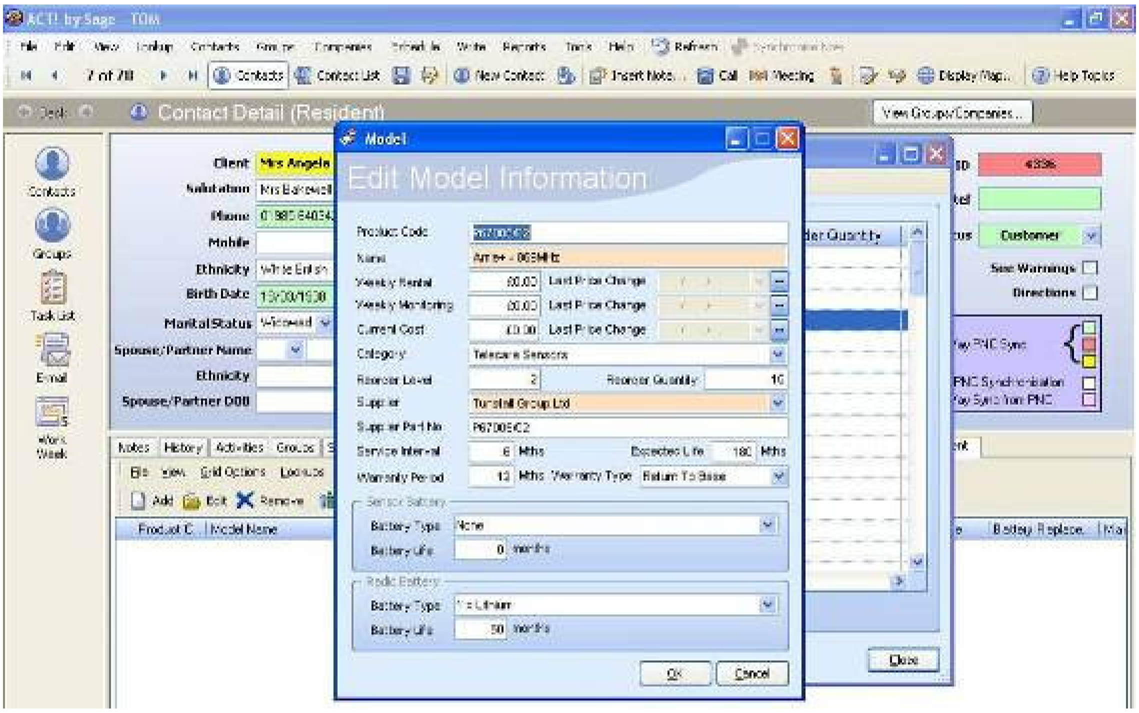
(2)

2. From this screen you can also add, edit or delete equipment

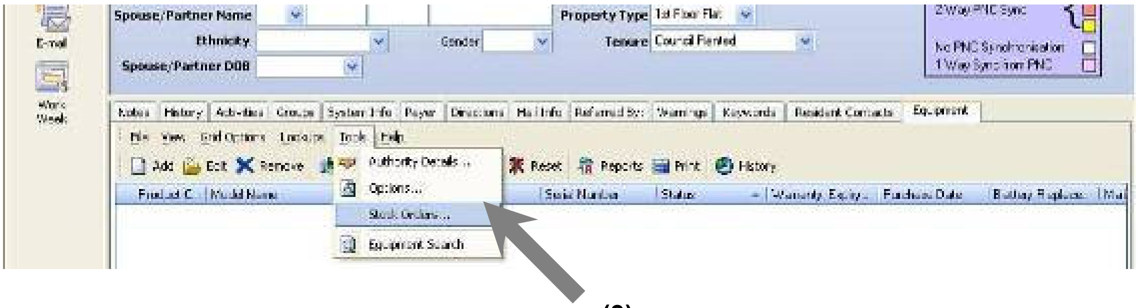
Note: All other detail may also be amended from this screen.

Cont/.d

To view a model record, double click on a model name and the full record will open. An example is shown below.

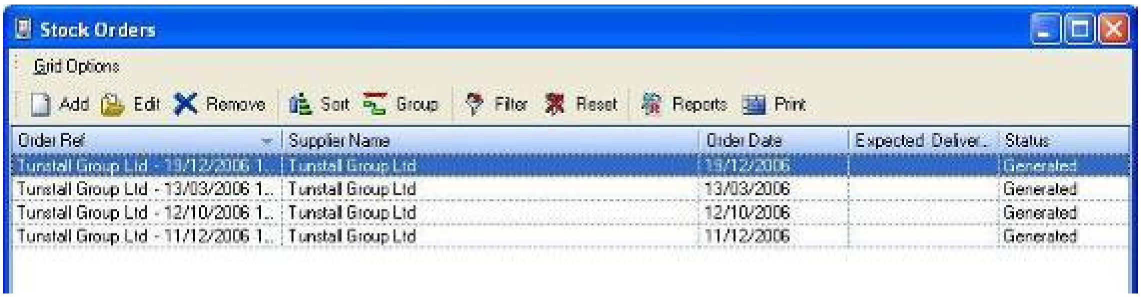


3. To either view previous orders or to raise a suggested order list click on ‘Tools’ and then ‘Stock Order’



(3)

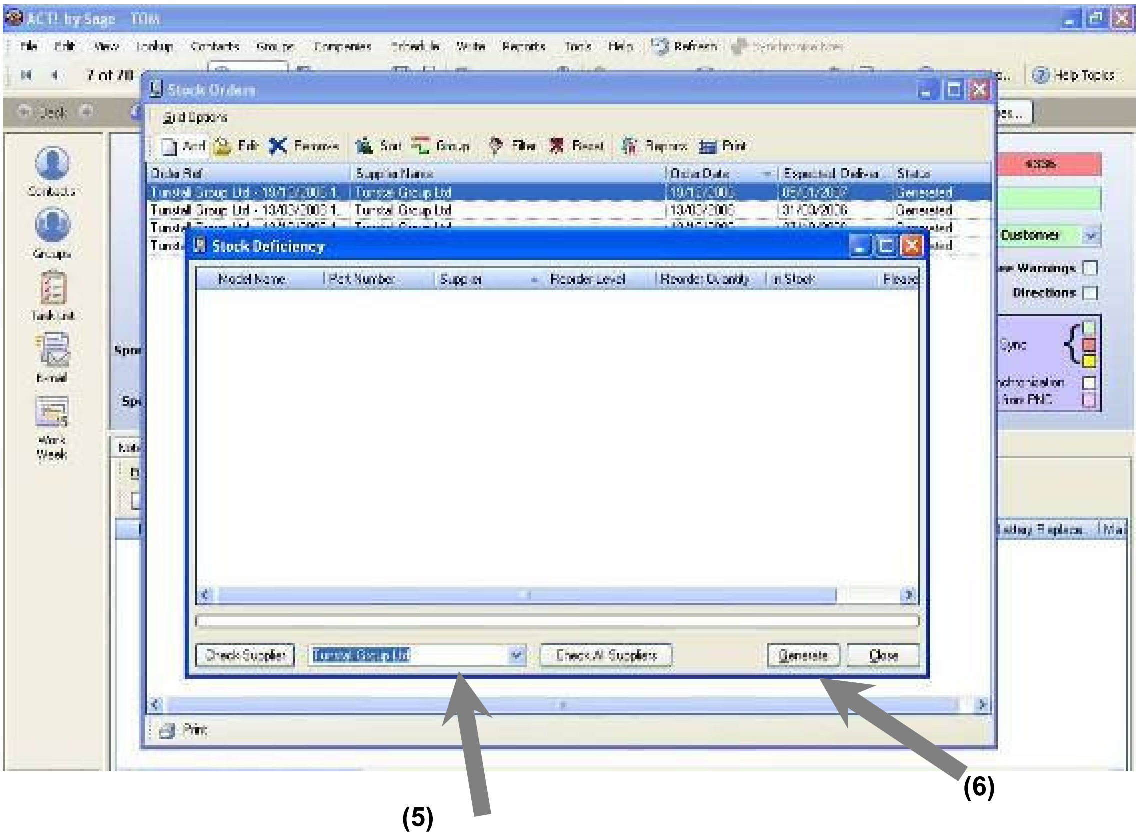
4. Any previous orders will be retained by the software for reference together with their status. To view them, double click on the order line.



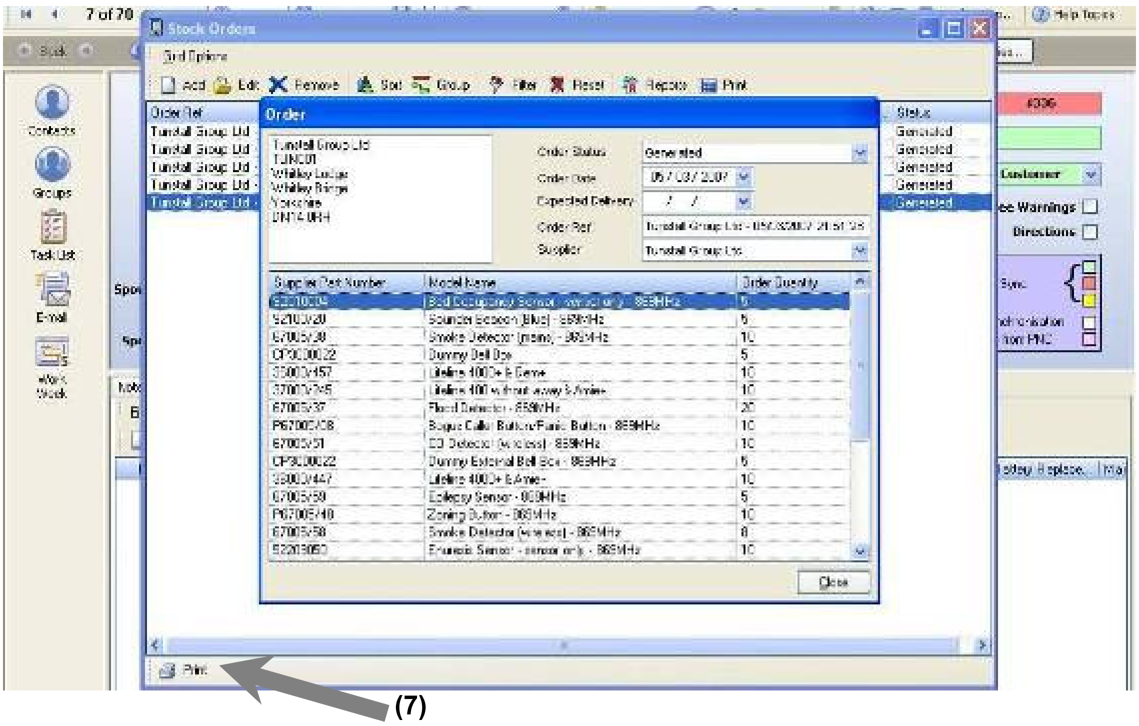
Cont/.d

5. To generate an order for a supplier, choose ‘Add’ and then choose the supplier to check from the drop down box at the bottom of the screen.

6. Choose ‘Generate’ and the software will calculate all stock deficiencies and generate a proposed order to that supplier.



7. Your order can then be reviewed, amended and printed.

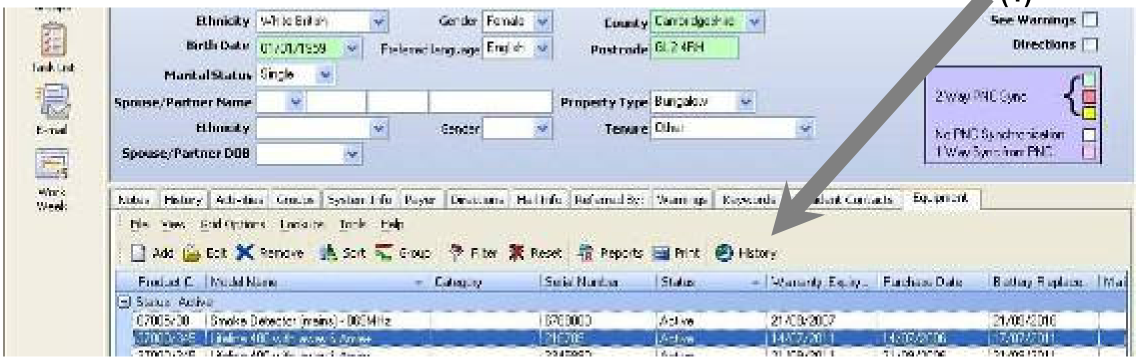


Equipment History

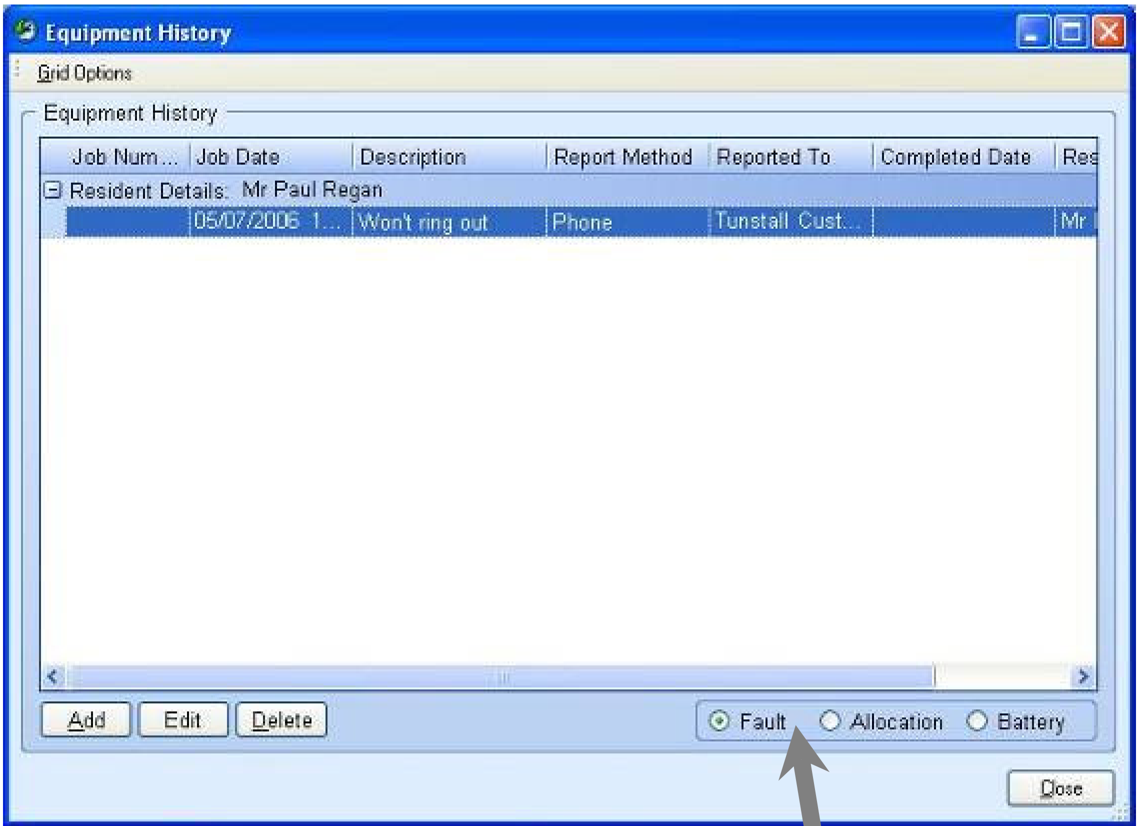
It is likely that a piece of equipment may be allocated to numerous people during the course of its life. TOM keeps a history of allocations, faults and battery changes that take place.

1. The History of an item of equipment may be viewed from a client record or from 'Add Equipment'. Highlight the specific item and click on the 'History' Tab to view History.

(1)



2. From the screen shown below, choose 'Fault', 'Allocation' or 'Battery' to review the associated history of item of equipment selected.



(2)

Note:

This screen allows a review of a piece of equipment. Fault recording can be completed here but Battery changes and Allocations can only be reviewed because they are added automatically when equipment is maintained or re-allocated.

Equipment Fault Recording

1. To record a fault, first find the item of equipment (see page 19). Click on the 'History' Tab as described in the previous section and then click on 'Add' as shown in the previous image on page 23.

2. The screen shown below provides you with a record of the fault, the report date and all of the other detail required to ensure that an accurate record of the issue is recorded. This is retained permanently in the software and may be referred to at any time. The screen will also immediately tell you the warranty of maintenance status of the equipment.

3. The vertical Equipment Tab also provides details of all associated equipment at the Client's property. This can be a useful aide if other equipment is linked to the faulty item.

(3)

Equipment Billing

See also 'Payer Tab'

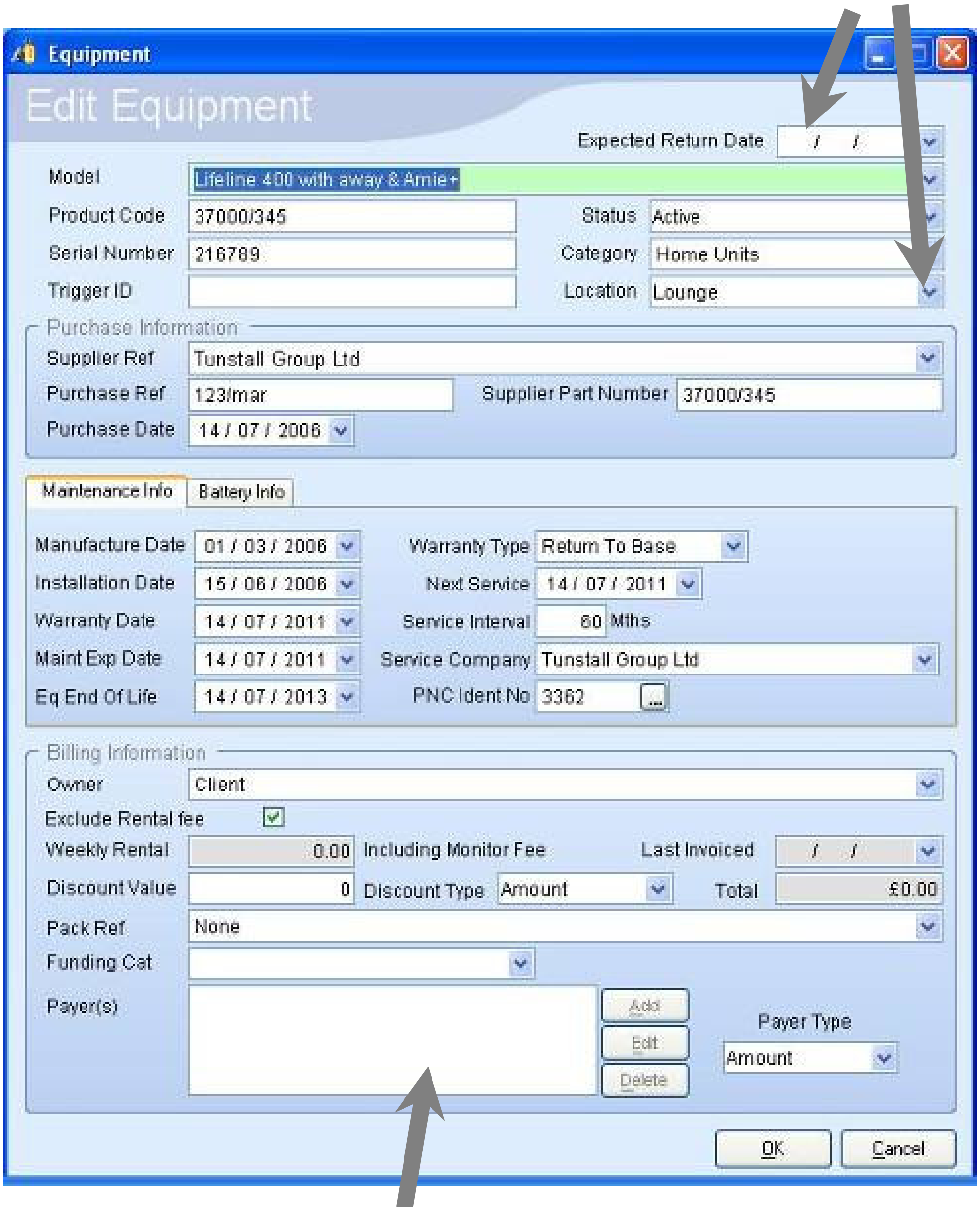
Billing information regarding any piece of equipment may be entered and reviewed by double clicking on any allocated item of equipment from the client record.

1. Equipment charges, monitoring fees and other charging information can be recorded and reviewed from this screen.

2. The software enables split fees by any percentage to be recorded together with multiple payers.

3. This screen is also used for recording information about equipment once allocated to a client such as its location in the property and 'Expected Return Date'.

(3)



(2)

TOM can also link directly to your Accounting system for Invoice purposes. For more detail, please contact your Account Manager.

Referred By Tab

The 'Referred By' Tab is designed to keep information about the source of the client and the reason they introduced the client.

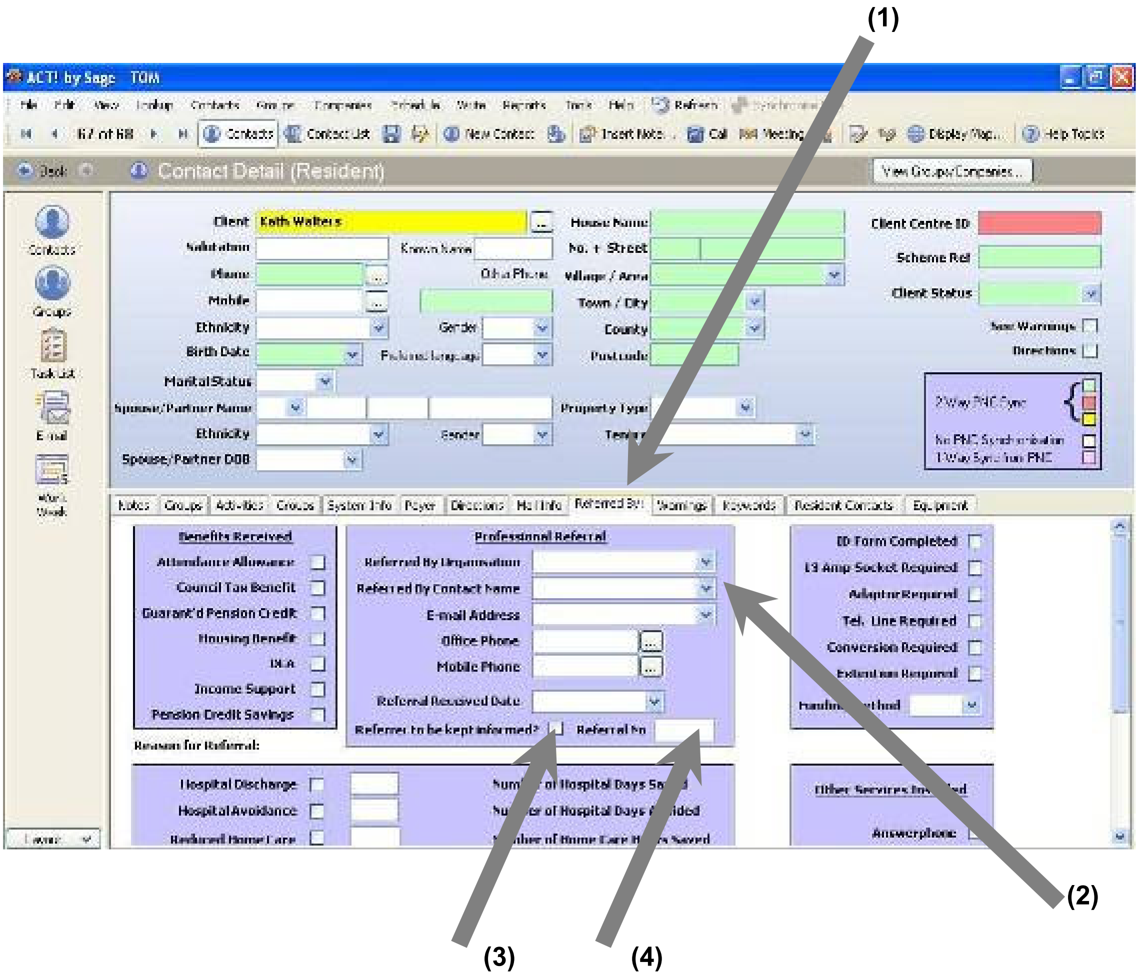
1. To enter Referral details, first choose the 'Referred By' Tab

2. Enter the details of the Organisation, the Contact Name and their e-mail address together with their telephone numbers.

3. If they wish to be kept informed of your progress with their referral, tick the box.

4. If they have provided you with a reference number, also enter this.

From this 'Referred By' page you can also enter details of the benefits received and other information about the installation.



Cont/.d

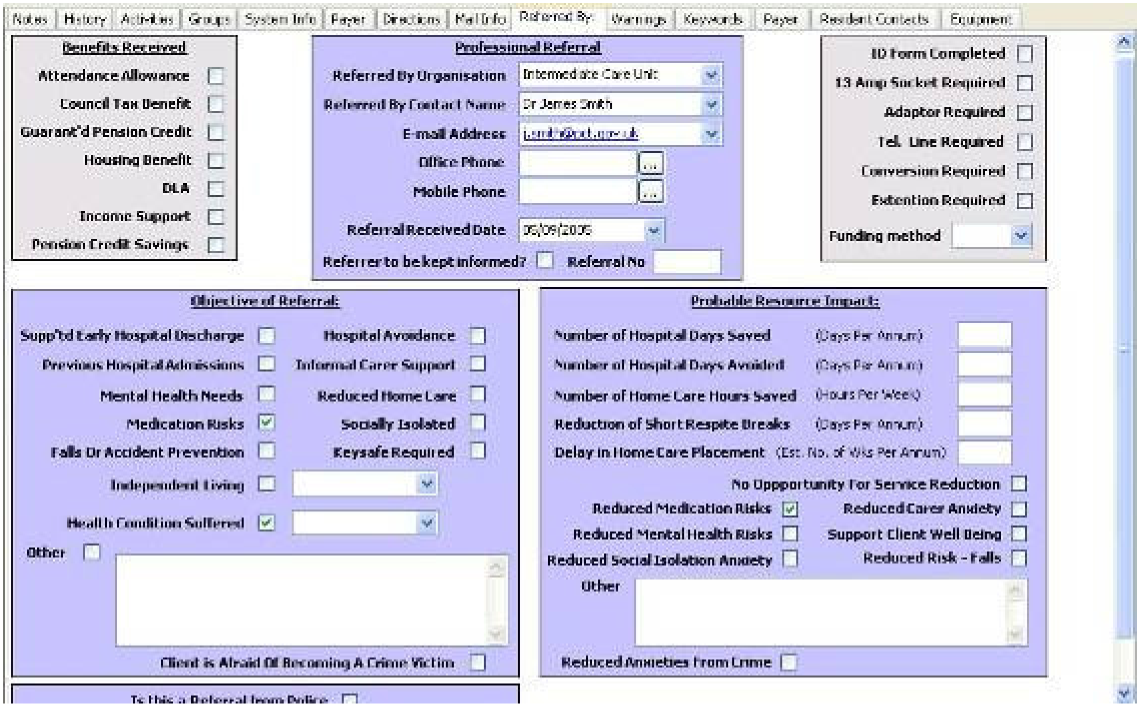
Further down the page on the same screen, are two more sections titled ‘Objective of Referral’ and ‘Probable Resource Impact’.

Here you can record the objective and prospective benefits achieved by installing equipment monitored by your service.

You may opt for as many of these as you are informed of. In most cases an estimate of the number of days or hours saved may be noted.

If no existing reason fits the correct criteria, then choose ‘other’ and write an explanation in the free text box underneath. If you are unsure of the correct choice, then consult your administrator who will be able to advise.

A series of reports are available to allow the calculation of a variety of statistics relating to the value of Telecare services in supporting the elderly and infirm to remain in their own homes.



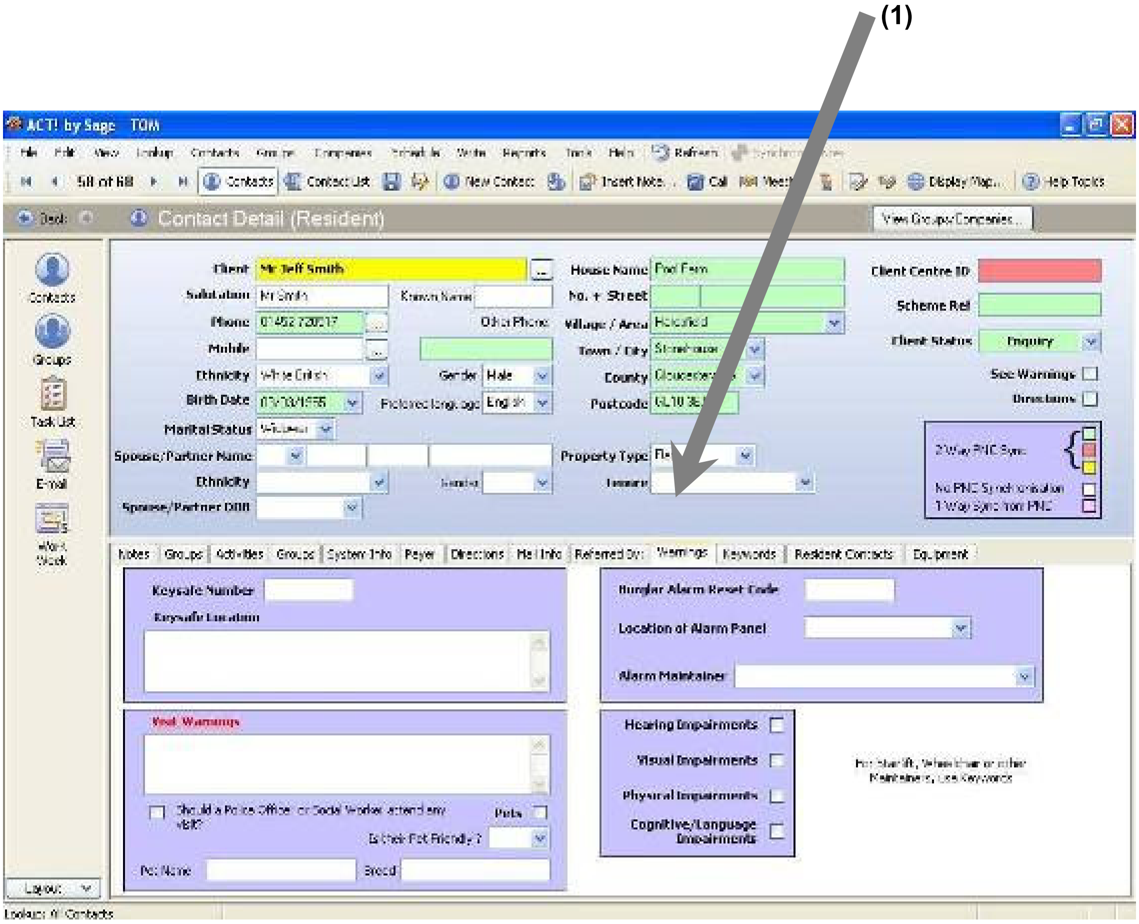
The Referral screen also enables you to record useful information about the initial installation and to keep details about other services the client uses.

These are designed to aid installation and service engineers. Information held here can assist them to fault find and, or act as an aide memoir about installation requirements.

Warnings Tab

1. To enter a warning, select the 'Warnings' Tab and enter the information you have received.

(1)



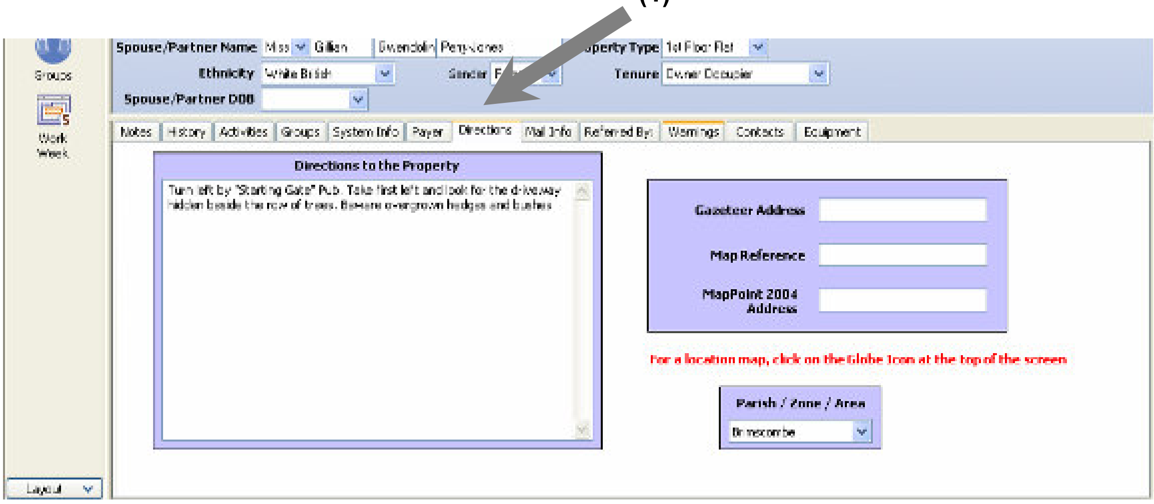
Keysafe, Burglar Alarm, Health & Visit Warnings are all designed to assist any member of your team who may visit the clients property.

Directions Tab

1. To enter Directions to a clients property, first choose the ‘Directions’ Tab.

A free text area is available for notes to be made of the directions to the property. You would normally enter the sort of information not readily found on a map.

(1)



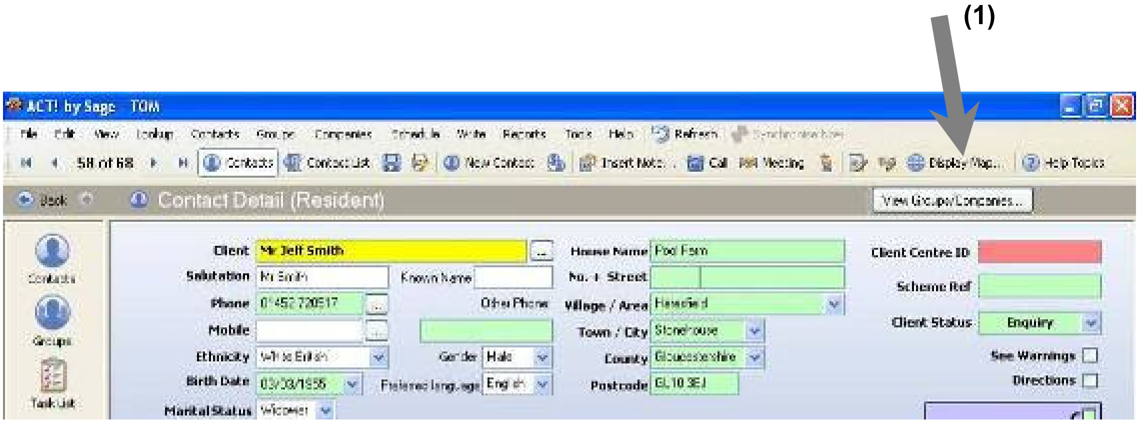
If your organisation uses a specific means of grouping your clients such as by Parish, Zone or an Area code, then you should complete the dropdown box on this screen so that your client/referral is included in searches by this route.

It may be that your administrator has also set up Group searches to match criteria in this field.

Some organisations use map references, Gazetteers’ or MapPoint. Any details should be entered on this screen.

Display Map

(1)



Ensure that a Postcode is entered in the client Address before attempting to use this feature.

1. If you are connected to the Internet, clicking on the ‘Display Map’ Icon at the top of your screen will start a mapping program that will highlight the properties matching the postcode of the clients’ address. This may be printed and attached to the clients file for reference purposes.

Payer Tab

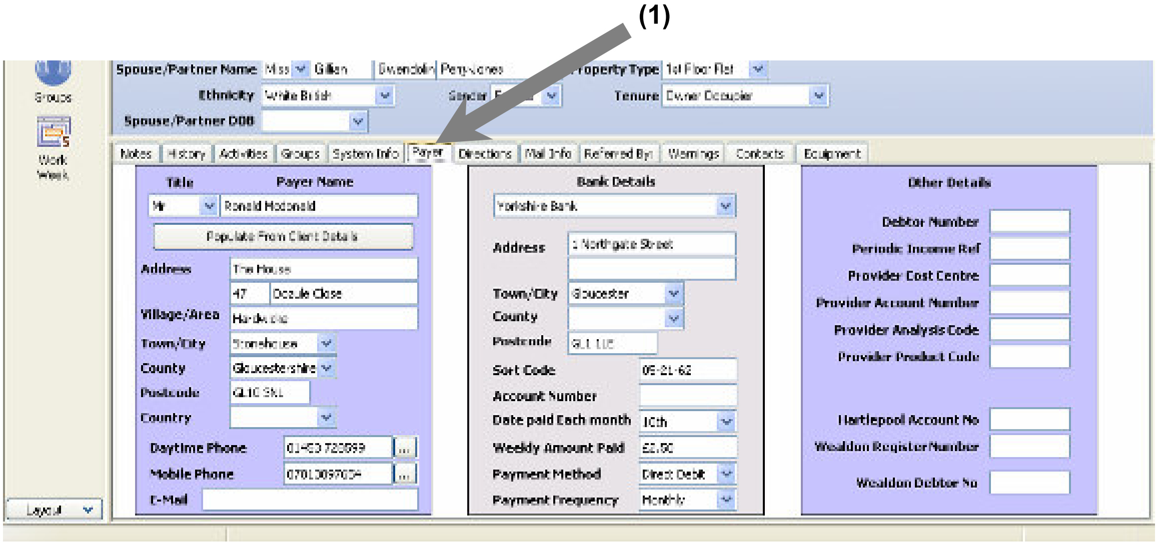
1. To enter Payer detail to a client’s record, first choose the ‘Payer’ Tab

If your organisation records detail of Payer information, the boxes in the left hand side and centre should be completed. If your organisation links TOM to an accounting package then the box on the right may also require some completion.

Invariably, at outset, the client will pay for their own products and rental. To assist entry, we provide a ‘Populate from Client’ box. Click on this if the client is paying. The rest of the required fields will then auto populate from the client record. These fields may be subsequently overwritten if the detail changes at a later date. If someone else is paying at outset, then the fields may be manually completed.

The ‘Bank Details’ box should be completed manually.

(1)



Note:

If you are using a Notebook computer that is taken away from the office, these screens will be unavailable to you. This is because they contain confidential information that should not be available to anyone in the event that the notebook is stolen or lost.

System Info Tab

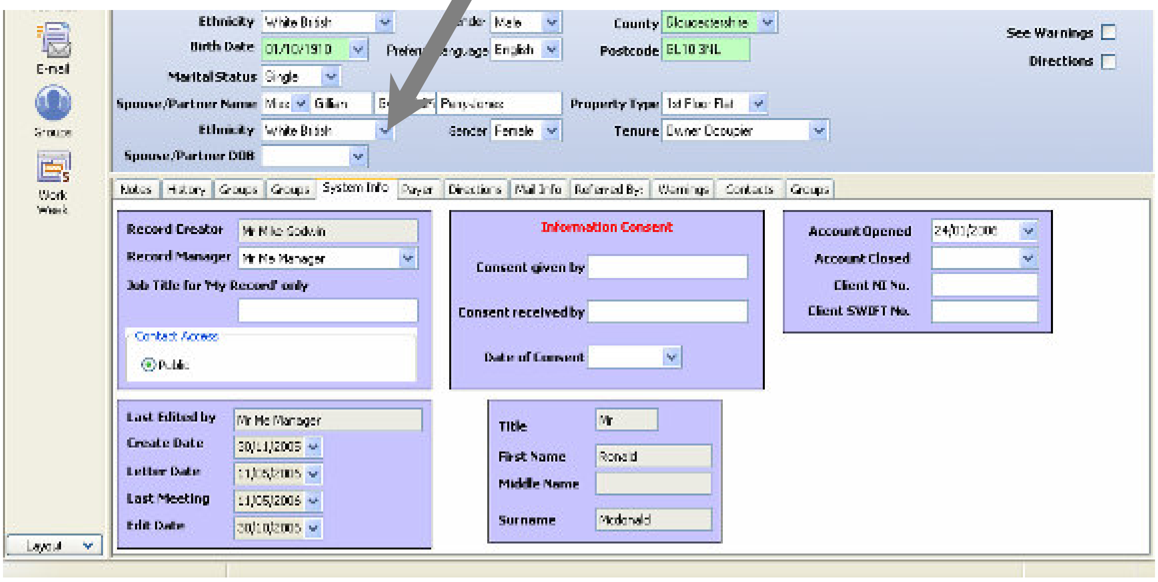
1. The ‘System Info’ Tab is used to keep information about the client record and who did what.

If your organisation obtains ‘Information Consent’ then the fields in this box should be completed. Generally it is the client who provides consent and it is an employee who receives the consent. The date consent is provided should also be entered.

The Account Information box is used to record the date a client account is opened and then later, the date it is closed. If your version of TOM synchronises with PNC, then these will be completed automatically for you.

You should also record the clients National Insurance Number if it has been provided and the Social Services SWIFT (or PARIS) Database record Number if the referral has been provided by your Social Services Department.

(1)



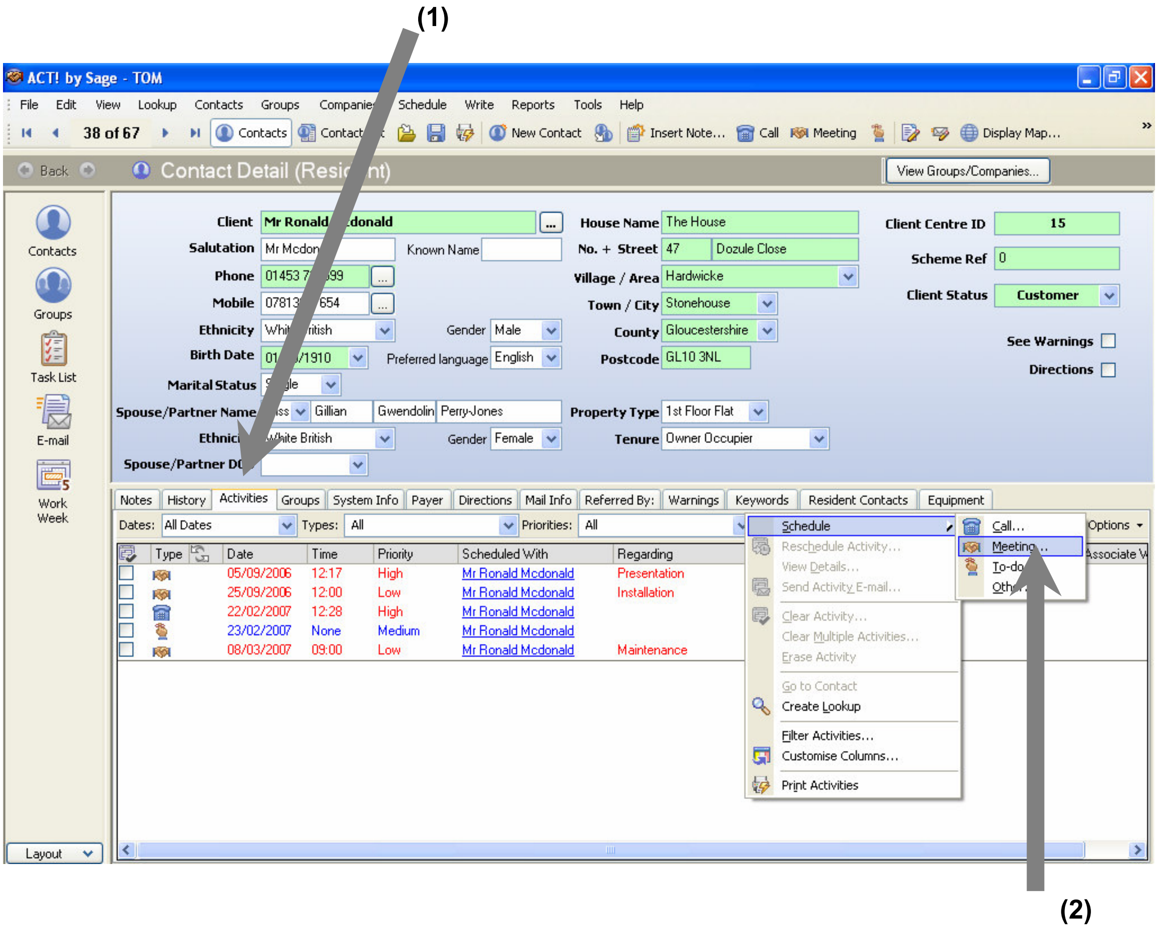
The rest of the fields on this screen are populated automatically. They are used for reporting and management purposes.

Activities Tab

1. The ‘Activities Tab is used to keep reminders of tasks, appointments and ‘phone calls.

This screen will show all scheduled future activities. These may consist of the following:

To-Do	A reminder to complete a Task
Call	Telephone the client
Meeting	Meet with the client



2. To schedule a task such as a meeting or a call, right click in the white space of the ‘Activities’ Tab and left click on ‘Schedule’. Choose from To-Do, Call or Meeting and enter the details in the pop up box that appears.

3. Within the Pop Up box (shown below), the date and time may be entered. The software will default to today.

4. An alarm may also be activated to remind you of the action before it is due.

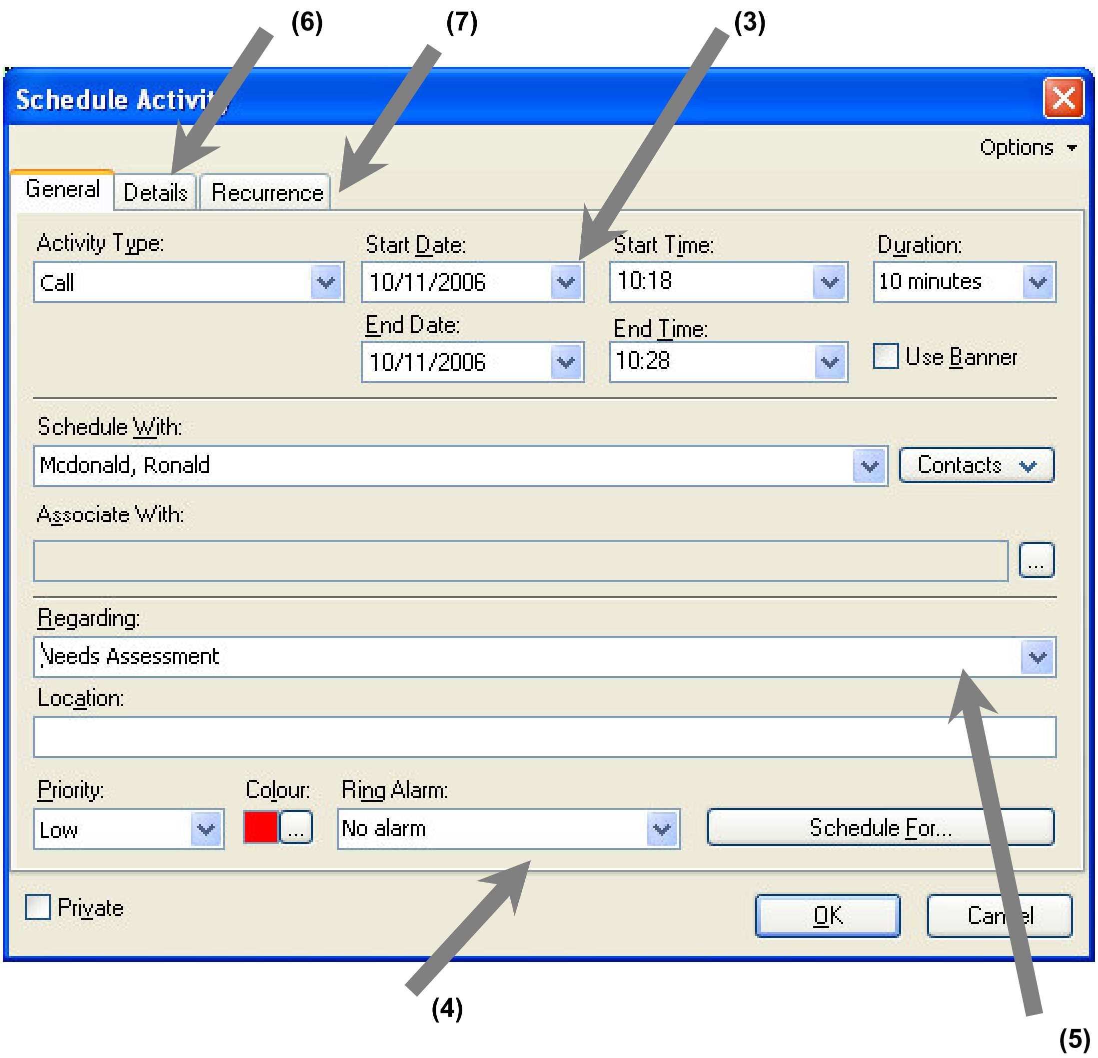
5. Enter a reason for the call/meeting/To-Do

Cont/.d

You may enter further information about the action within two further Tabs in the Pop Up box:

6. Details - Provides a notepad for detail of the action

7. Recurrance - enables you to schedule Daily, Weekly, Monthly or annual events.



Note:

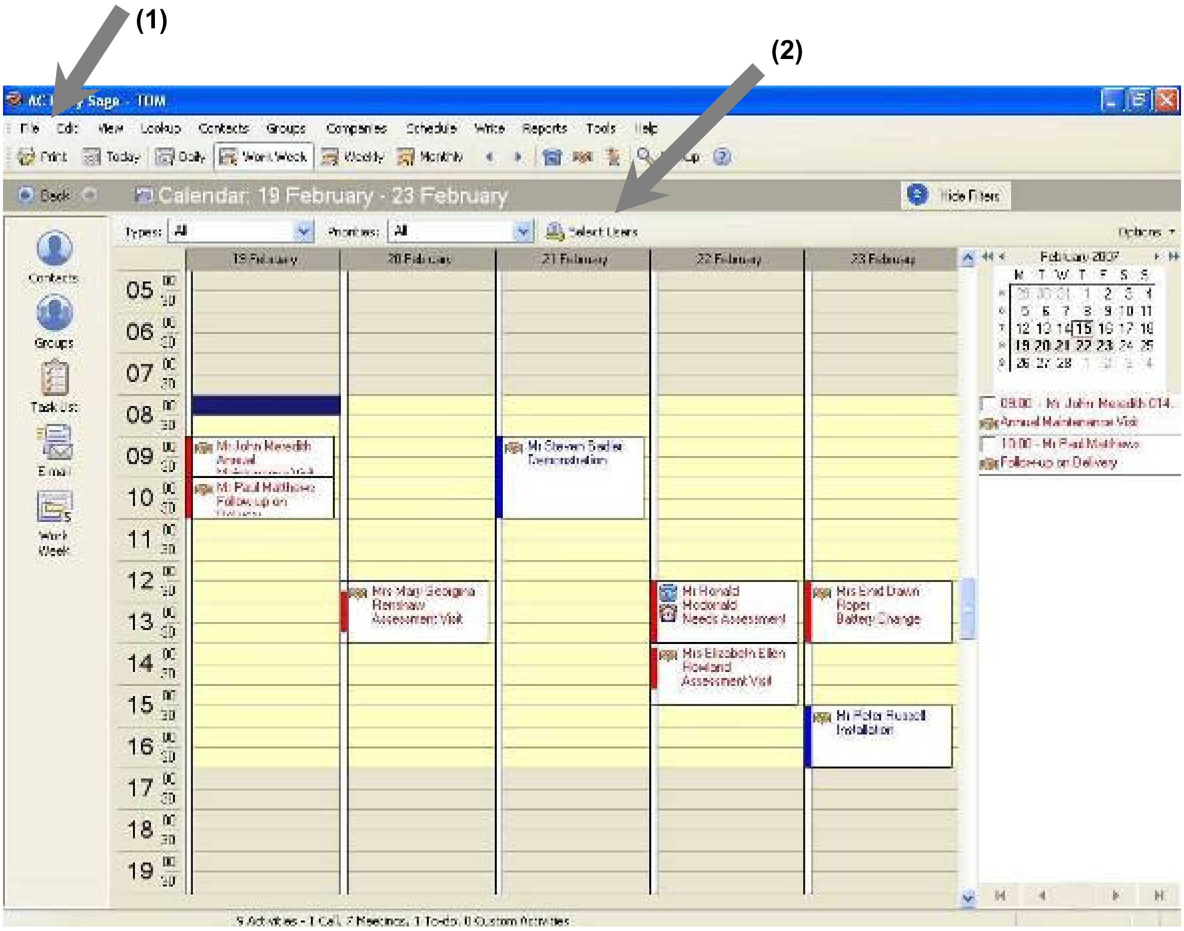
This feature is very useful for scheduling recurring maintenance visits. A daily schedule of planned activities and reminders can be easily viewed using the Calendar. (See Next Page).

Calendar

The Calendar is accessed by clicking on the large icon shown on the left of your screen.

All items entered as a meeting will be shown in the calendar. They can be moved around and edited just as you would in Outlook or other mail programs.

All diary and task entries may also be viewed from the client record as well.



1. Your calendar may be printed by selecting the print icon at the top of the screen.

Group Calendar

TOM can display the Calendars for multiple people who keep their diary entries within this software.

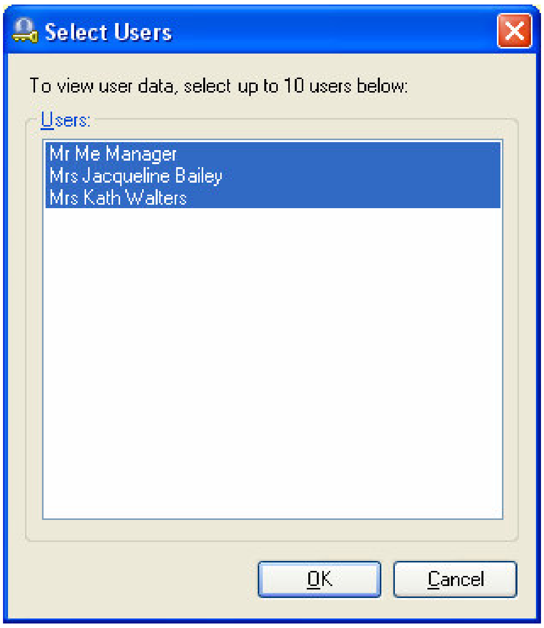
TOM Professional can keep diaries for up to 10 people.
TOM Workgroups can keep diaries for an unlimited number of people.

Cont/.d

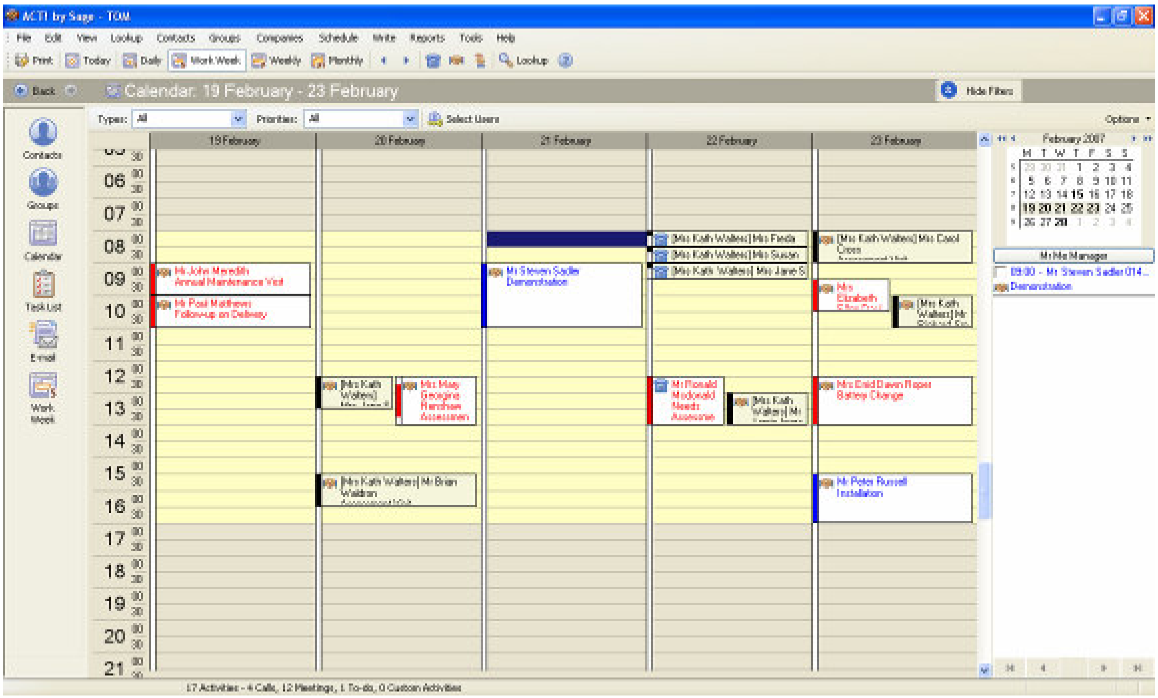
Only TOM users may make entries in the diaries but any diary or combination of diaries can be printed out on a daily, weekly or monthly basis.

To view the diary of other users as well as your own diary, left click on the Select Users Icon as shown in the screen above **(2).**

The pop up screen shown below will then appear where you can choose the diaries you wish to view by highlighting each one and clicking OK.



The diary displayed will then show the entries for all of the selected users. This can be very useful when scheduling joint visits or when trying to establish when staff are available for meetings or visits etc.



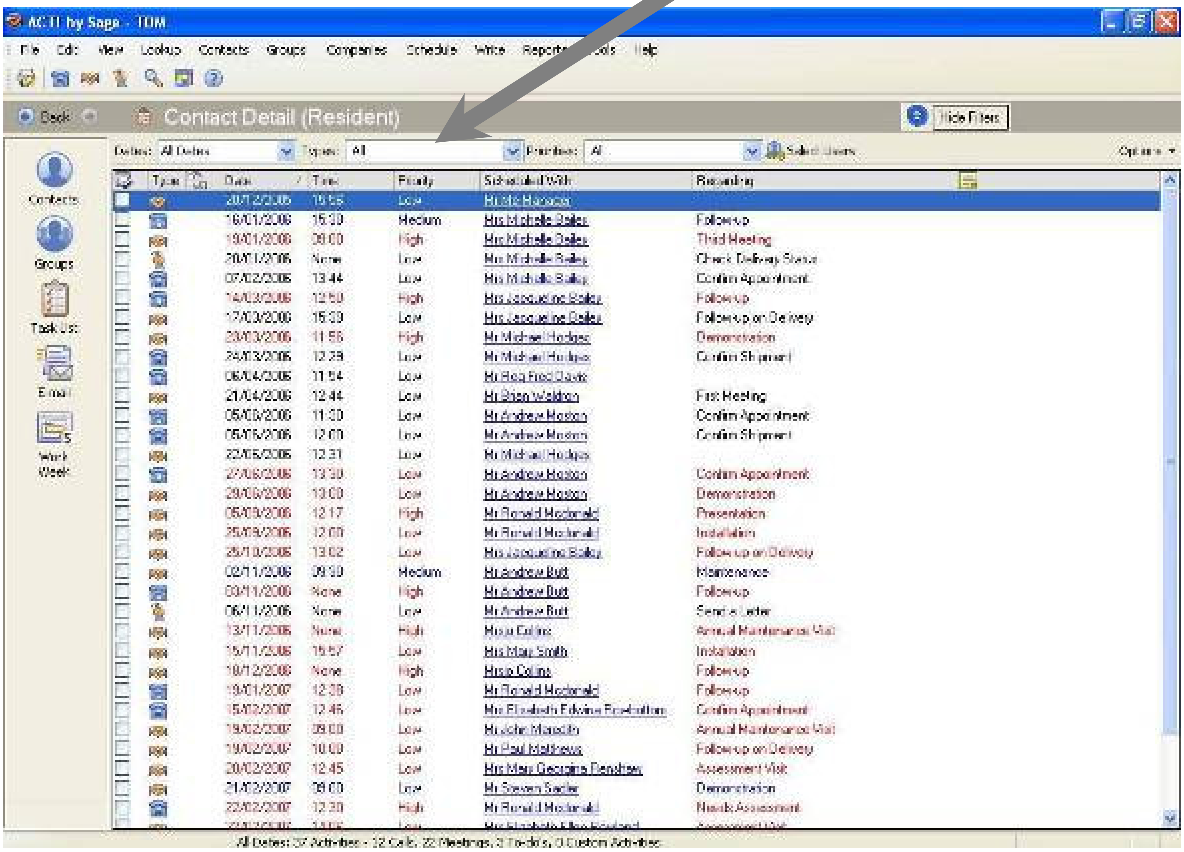
Task List

The Task List is accessed by clicking on the large icon shown on the left of your screen.

All outstanding ‘To-do’s’ and ‘Calls’ will be shown in the list.

After completion of a task or a to-do, double click on the relevant line to open the entry. The screen will default to complete and remove itself from the list.

(1)



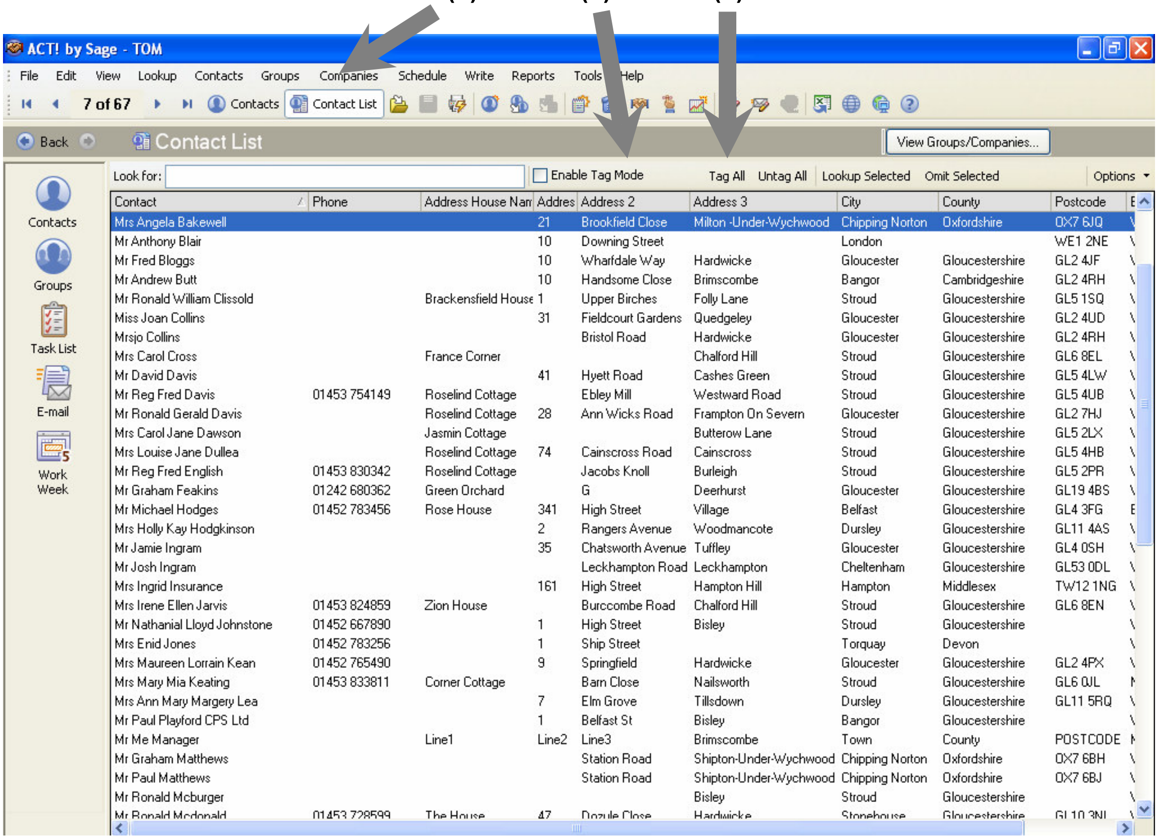
1. It is possible to look at a specific range of dates and to look at specific activity types by setting filters.

Where you have multiple users, it is also possible to look at other peoples’ lists as well.

View Client List

1. To view a list of your clients (or any subset of clients) click on the ‘Contact List’ Icon

(1) (2) (3)



From the ‘Contact List’ View it is possible to select a single client (as shown above), or you can multi-select clients to form a subset in any different way of your choice.

2. ‘Tag Mode’ enables you to select clients for ‘mailshot’ purposes by e-mail or by letter.

3. ‘Tag All’ immediately selects all of the clients shown in the list. Untag all, reverses this action

4. ‘Lookup Selected’ forms a set of those records that have been highlighted already.

5. ‘Omit Selected’ forms a set of records that exclude the highlighted records.

Customising Client Lists

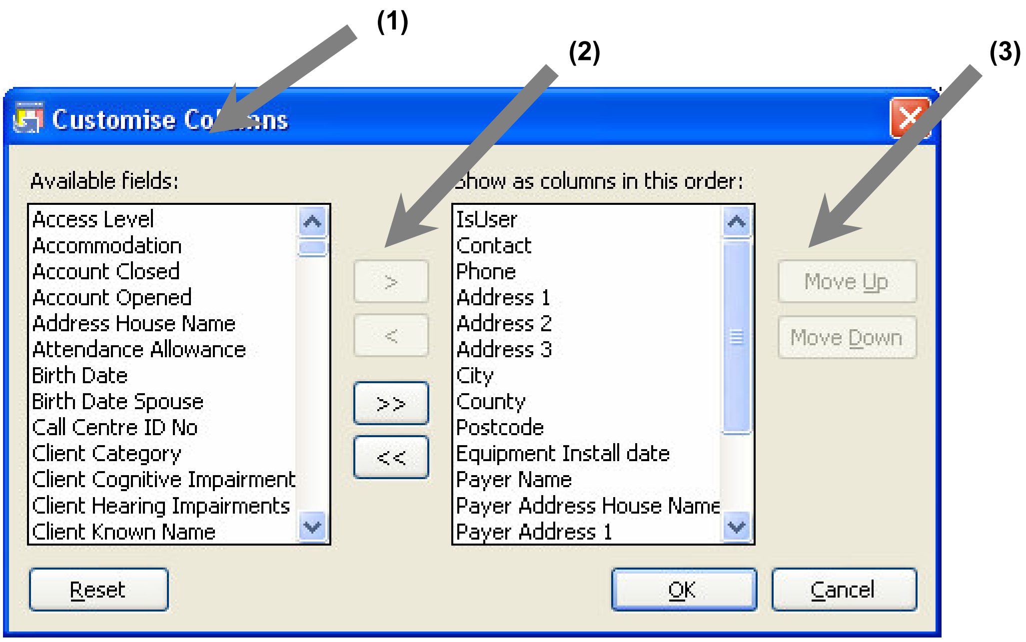
The Client List ‘View’ may be customised to your own settings by clicking the ‘Options’ button and choosing ‘Customise Columns’.

1. All Client fields are available for inclusion in your Contact List view.

2. Fields chosen can be added by highlighting them and clicking on the arrow button.

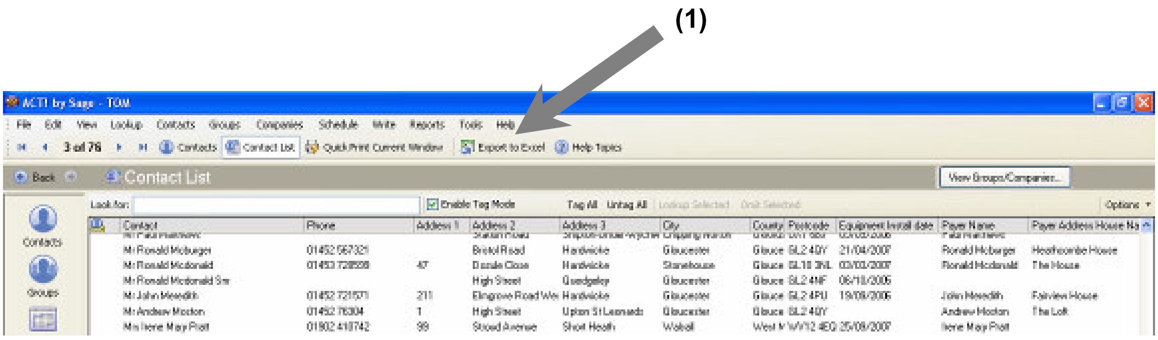
3. The order of the fields selected may be changed by highlighting and clicking on ‘Move Up’ or ‘Move Down’

   When finished, click on ‘OK’ and the chosen fields will be displayed in list view.



Export to Excel

1. Click on the Icon ‘Export to Excel’ and TOM will automatically take all of your listed records and the fields you have chosen to list with them across into an Excel Spreadsheet.



Notebook Synchronisation

If you are using a Notebook computer, a Tablet or Laptop computer then you will need to synchronise regularly with the main database held on your server. This is because the data entered on your machine is independent of the main database.

Any Notebook or Tablet computer will have two extra Icons shown on the top toolbar. These are Synchronise Now and Refresh. (2) & (3)

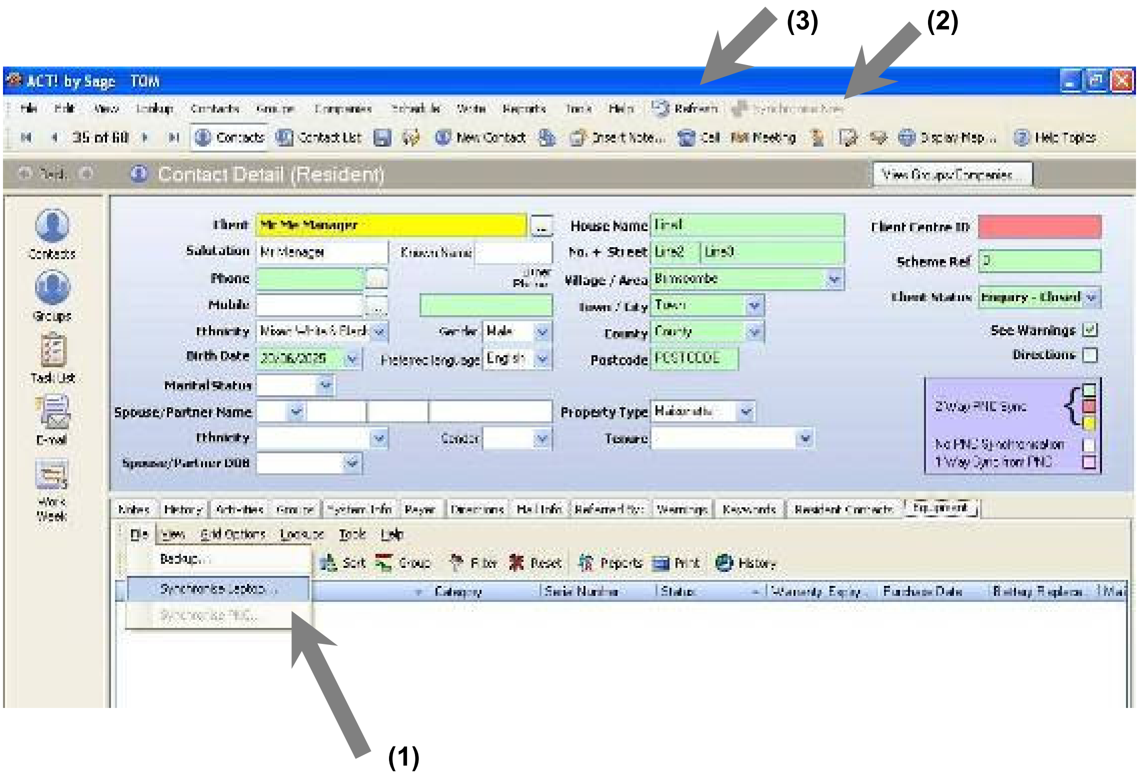
Before synchronising, **ensure that a network cable is plugged into your computer** and that you have logged onto your network.

To synchronise successfully, you need to synchronise twice:

1. Synchronise Equipment, Resident Contacts and Keywords by selecting the relevant tab in the middle of your screen and then choosing File. Then simply click on ‘Synchronise Laptop’.

2. Synchronise everything else by clicking on the ‘Synchronise Now’ Icon at the top of your screen.

3. To view any new data received you must click on ‘Refresh’. (3)



Note:

Synchronisation must be completed within the interval set by your administrator. For security purposes, the database will lock and become unusable if no synchronisation takes place within this period. Any data entered since the last synchronisation **will be lost,** If this is not done.

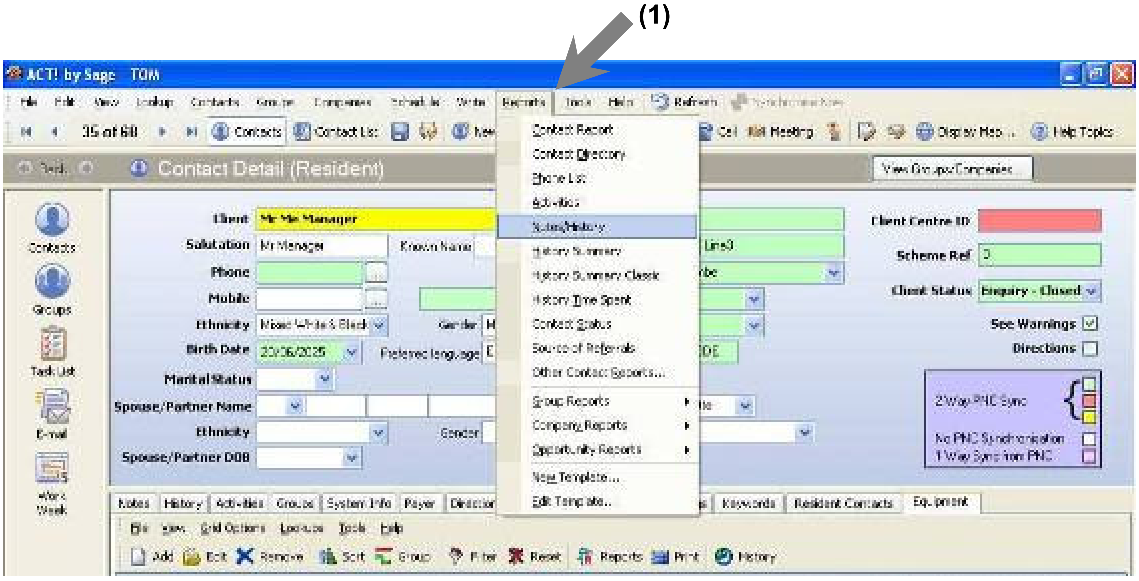
Reports

Reports are divided into Client based reports and Equipment Based Reports

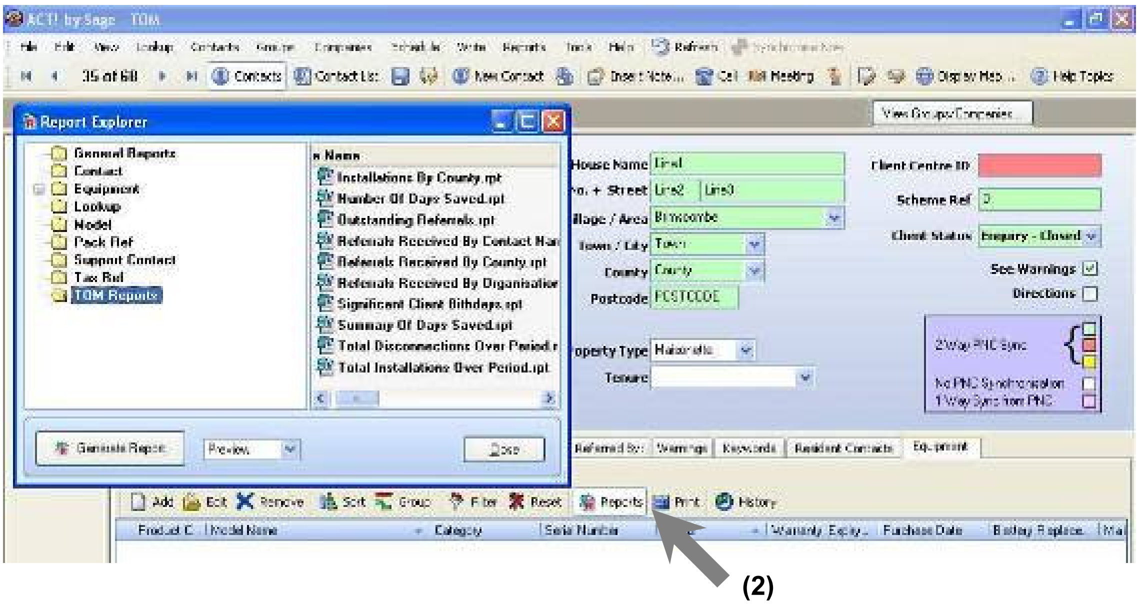
1. To access Client reports click on the Reports button on the top menu bar

A number of standard reports are available and we suggest you browse through these. If you are unable to find a report that suits your needs a report editor is available with which you can edit existing reports or design your own.

(1)



2. Equipment Reports are accessed from the Equipment Tab. Choose this and then select Reports



(2)

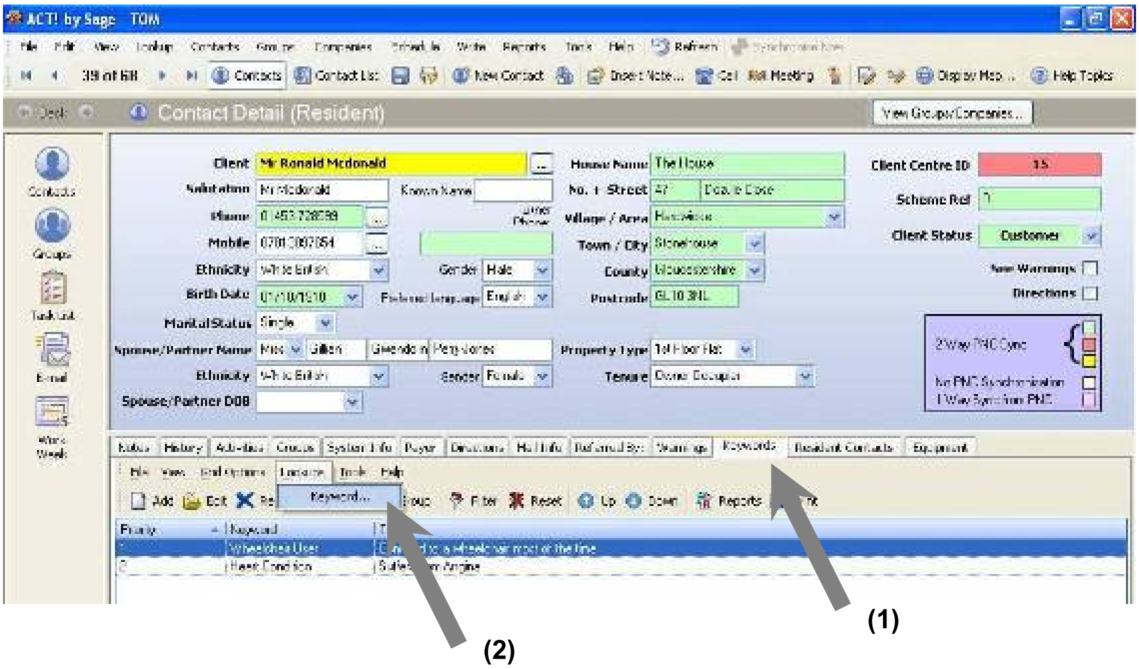
If any further reports are required, please call us. We would be happy to discuss your needs and then provide further / edited reports.

Keywords

1. The Keywords are accessed by clicking on the ‘Keyword’ Tab in the middle of your screen.

Keywords provide the facility to maintain a list with comments of your regular notes against a client. These are user defined titles that can be used throughout your client list.

In many cases these keywords will be set up to coincide with the keywords employed within your Control Centre software.



(1)

(2)

Additional Keywords may be setup by choosing ‘Lookup’ and then ‘Keyword’. (2)

Whenever you add a keyword to a clients’ record, you also have the facility to add additional text to further explain the condition applicable to the client.

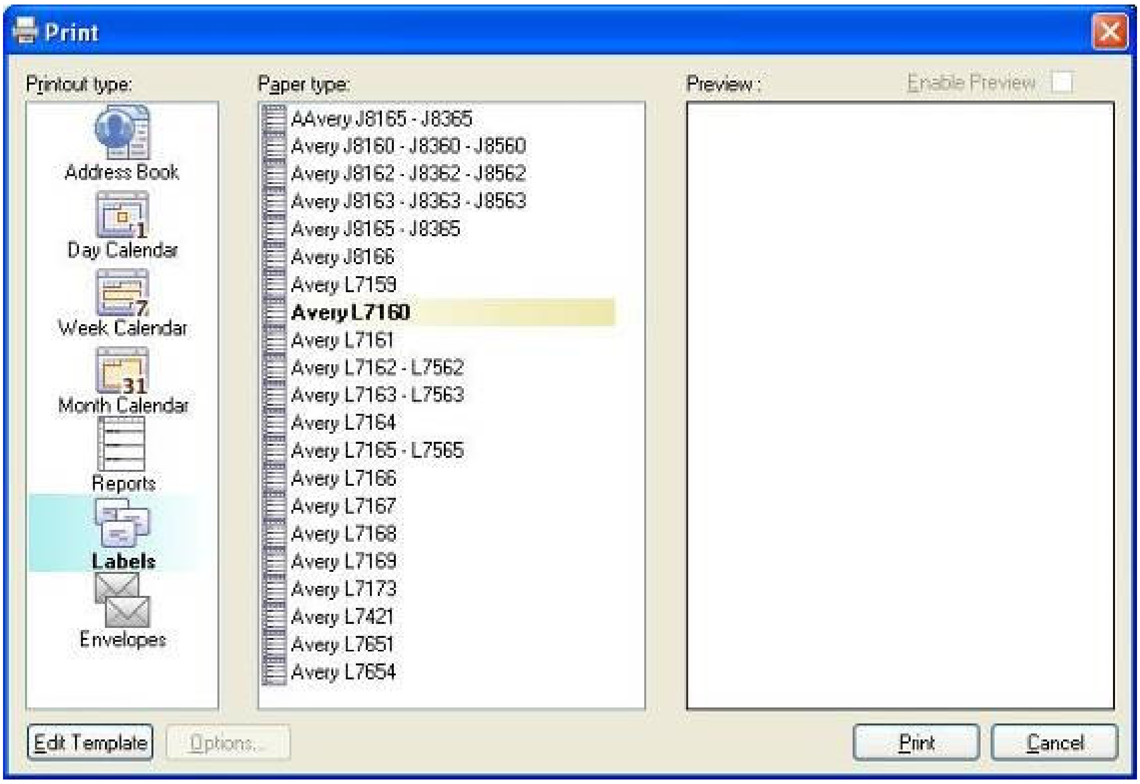
If you are synchronising with laptops or to Control Centre Software, then any entries you make will also be added to the other machines or software.

Address labels

TOM provides the facility to easily print Avery compatible labels of any size or design.

To access Label printing, simply click on 'File' and 'Print'. (As you would in any Windows Program).

A menu of printing options becomes available and from this, you can choose appropriate style label.



You can choose to print a label for just a single contact, a group of contacts or a chosen 'Lookup'

We recommend that you opt to preview your chosen label and Lookup before running to a printer

Notice that from this screen you can also print a copy of your diary in a variety of formats.

Postcode Finder

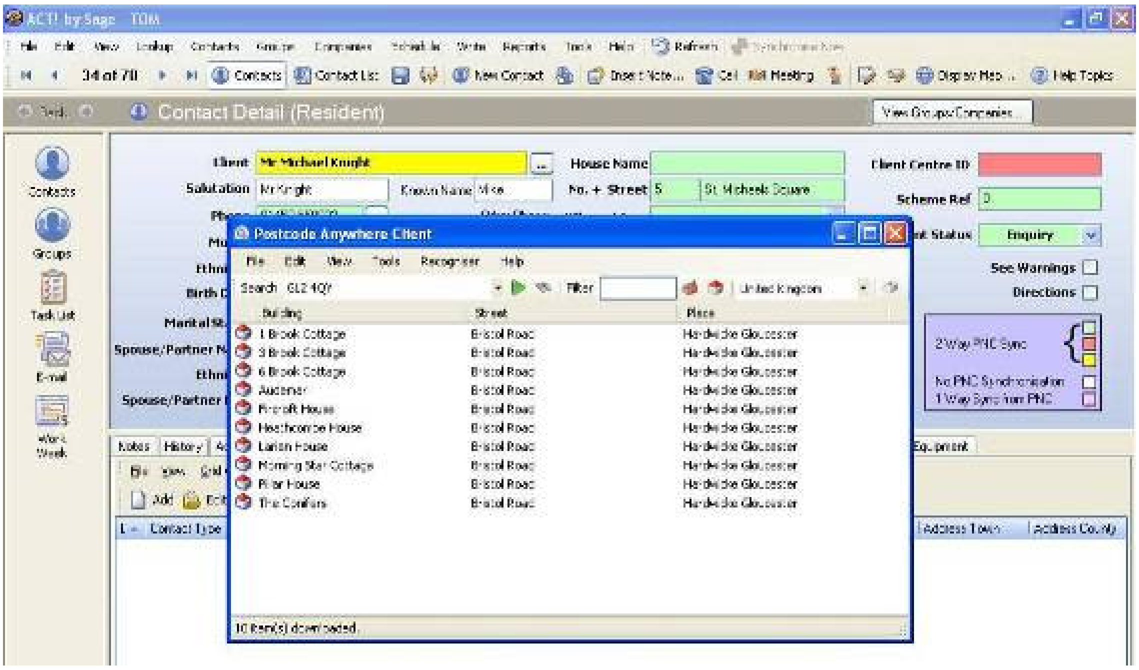
An optional Post Code Finder enables users to enter accurate and complete addresses without having to type in all of the detail except the Post Code. The software is also able to complete reverse searches if you have a partial address without a post code.

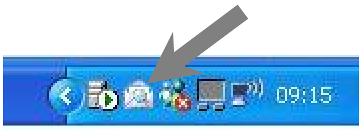
The Post Code Finder is available wherever a user needs to enter an address:

- **Client**
- **Payer**
- **Correspondent**
- **Resident Contacts**

To use the Post Code Finder, simply type in the relevant Post Code and then hit your space bar.

The software will then return a list of all properties matching the postcode. Select the matching address and double click with your left mouse button to populate all the rest of the fields.



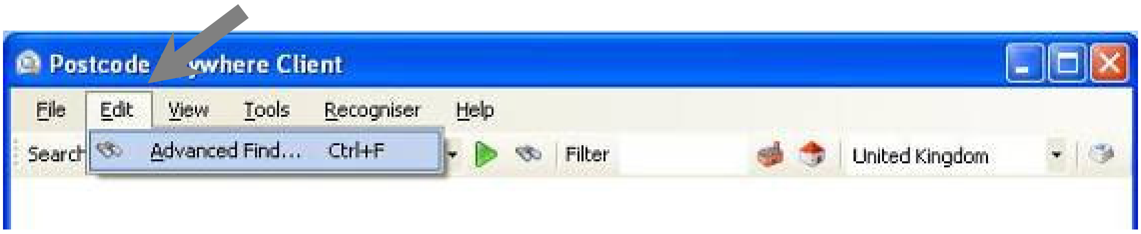


To complete a reverse search where you have any partial address and no Post Code; right click on the Envelope Icon in your system tray which opens the Finder software.

1. Select 'Edit' followed by 'Advanced Find' as shown below

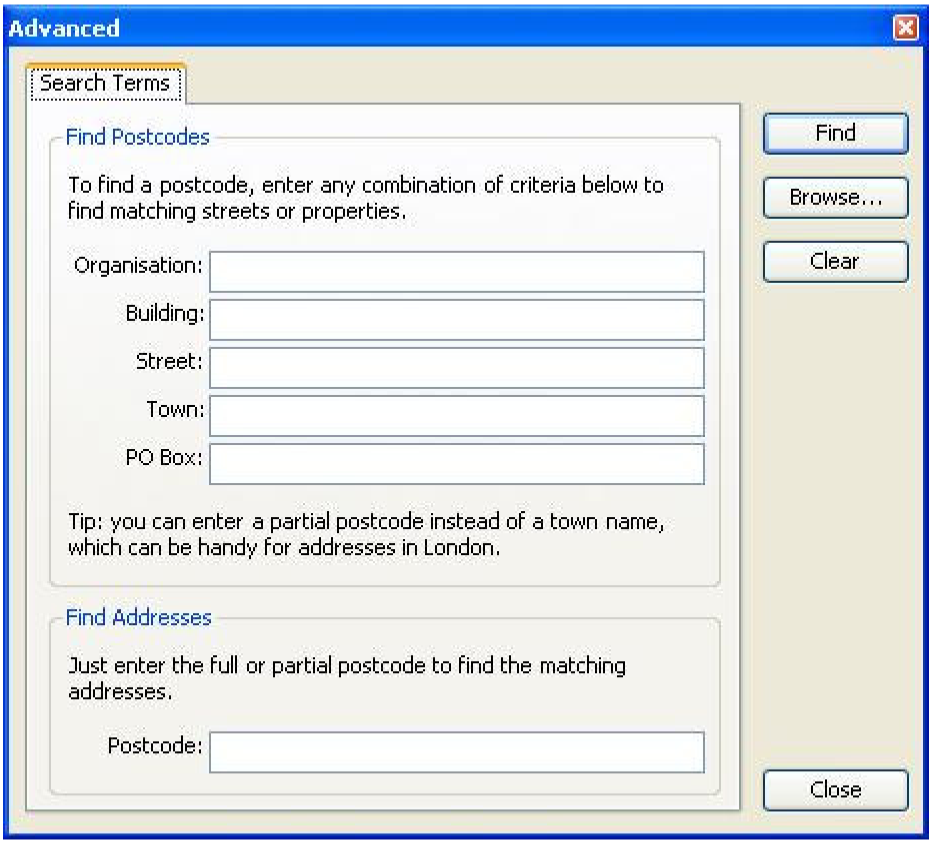
Cont/.d

(1)



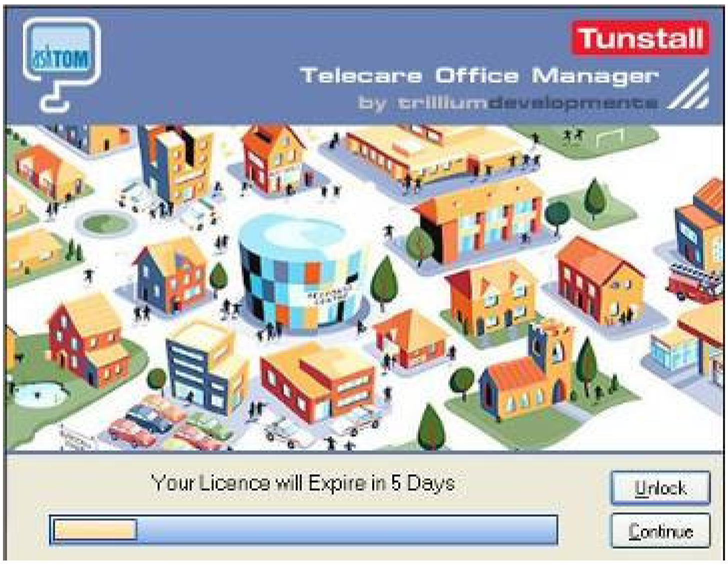
2. Enter as much of the address detail that you have available as shown in the screen below and tell the software to 'Find'.

The results of your search will then be shown on screen and you can select the correct address with which to populate your address.



TOM Licence Renewal

30 days before the renewal of your licence is due, a message will appear upon every computer when TOM is first launched.



Each day the message will count down until the following occurs:

To renew your licence, please call the support telephone number shown below. The new licence number provided must be input individually to every machine.

After calling for your new licence code click on ‘Unlock’ and follow the instructions provided to renew your licence.

Support

For Support, please call:

Tunstall Telecare Support Group (TSG) on 0845 026 1255

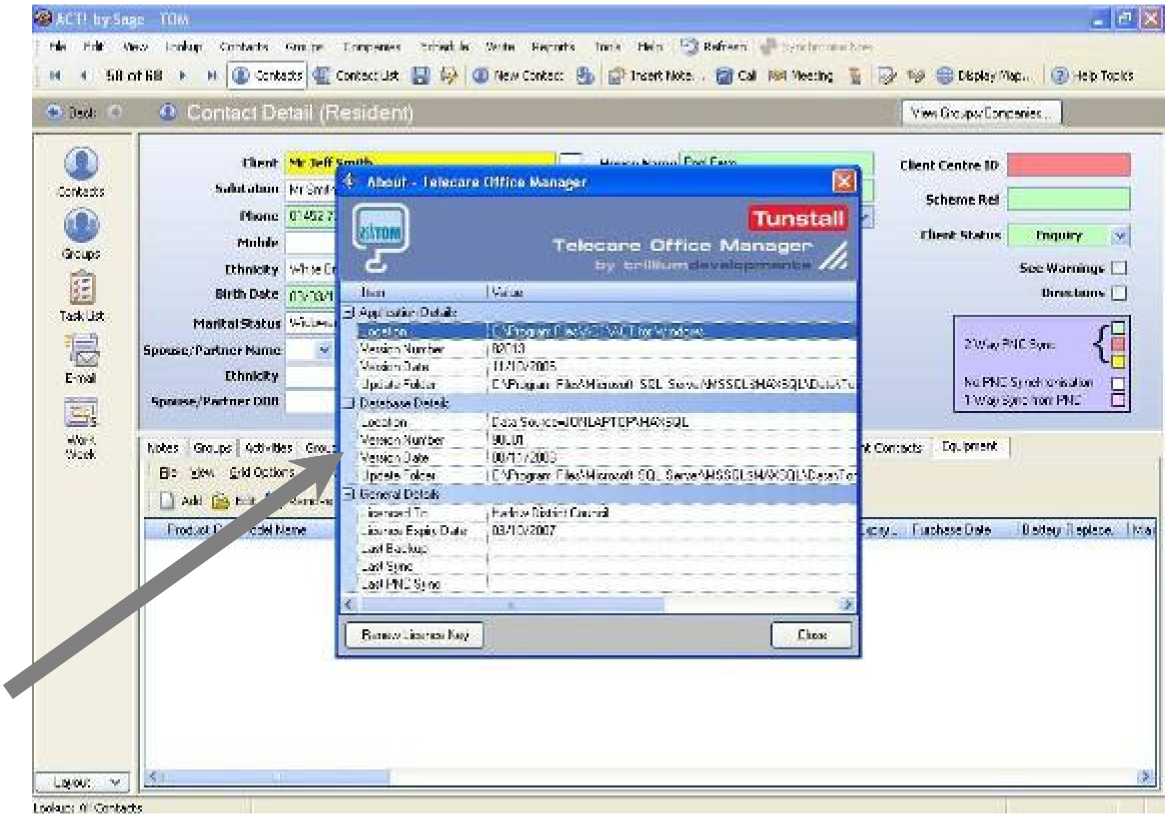
Viewing your Version Number for TOM

When calling for support, it is likely that you will be asked what version of TOM you are running.

1. Choose Keywords, Resident Contacts or the Equipment Tab

2. Click on ‘Help’ and then ‘About’

The current version number will be displayed upon this screen.



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