



**CleverClients**  
**Release 3.1**  
**August 2019**

**The Clever Company Pty Ltd**

<https://sourceforge.net/projects/cleverclients/>

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## QUICK START

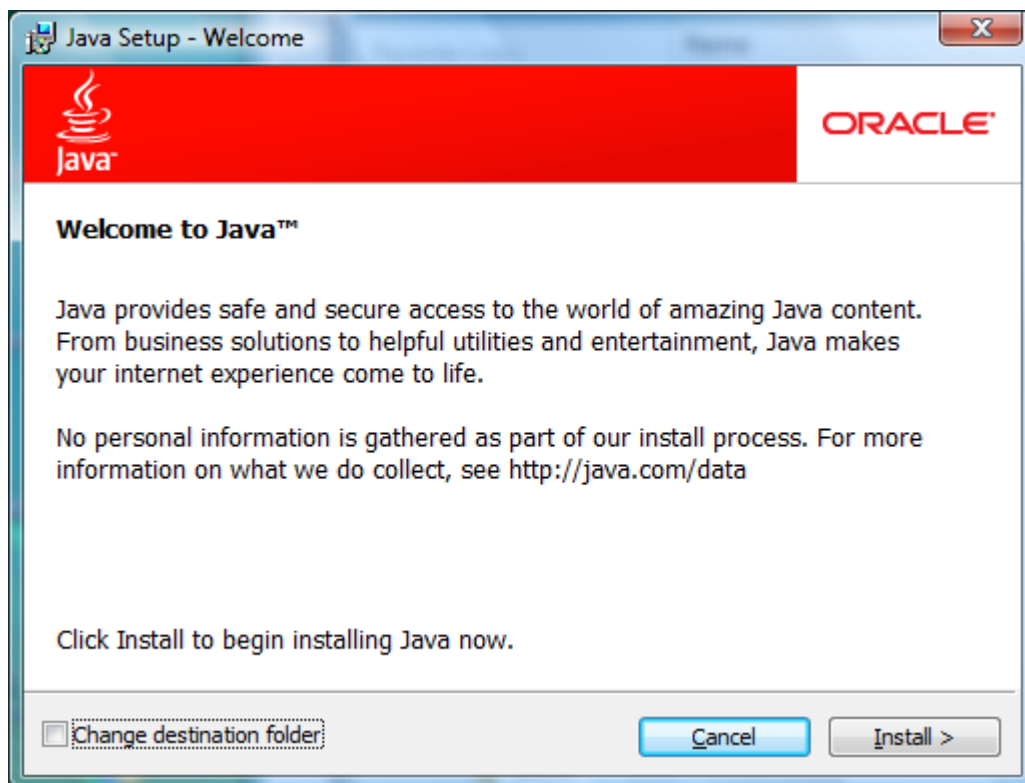
This section is designed to give you a quick look at CleverClients. Everything is described in more detail in the following manual.

You can also look at [the extensive information](https://sourceforge.net/projects/cleverclients/) on the web site <https://sourceforge.net/projects/cleverclients/>.

After you have downloaded and run the setup procedure the system can be started using the one of the example businesses. You can try it out immediately, but we recommend that you spend a little time to skim through the following chapters.

You **must install Java** to use CleverClients. This will normally happen during the system setup.

Java is a standard computer language. It is embedded in your browser, and your phone and is used in your on-line banking system. For more information about Java go to [www.java.com](http://www.java.com).



# 1. INTRODUCTION

## 1.0 Background

The CleverClients system is developed by the Clever Company; hence the name.

The software is based on the CleverPsych system for managing single psychologist practices. CleverPsych has been in use for several years.

## 1.1 This manual

We are trying to supply a comprehensive manual that will tell you everything you need to know when read in association with the web site <https://sourceforge.net/projects/cleverclients/>.

You should work your way through the manual and look at the supplied demonstration businesses.

You usually start with an example business that is similar to your business, and modify the configuration to suit the way you operate.

When you have done this you will know how to use CleverClients and have a system configured for your business. We expect that most users of CleverClients will have a good working knowledge of Windows, but we will tend to supply too much detail just in case. **This extra information will be coloured so you can skip over it if you like.**

## **2.0 GETTING STARTED**

### **2.1 Installation**

CleverClients is supplied as a standard windows setup.exe file.

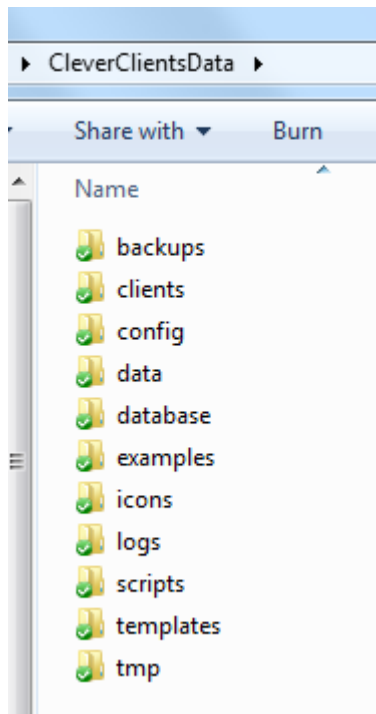
The details are on <https://sourceforge.net/projects/cleverclients/>

### **2.2 Files**

Installation will give you two directories (folders in MS-speak) in the C: drive.

- The software is installed in a standard windows location C:\Program Files (x86)\CleverClients. You can remove it using The Windows control panel.
- CleverClientsData holds all the support files for the system including databases and configuration files. Initially it contains files for the example businesses. All your files will be stored here. The folder is initially in your home directory e.g. C:\Users\Fred, and we recommend that you move it later to a Cloud service like Dropbox.





TopDirs.png – Basic folders

## 2.3 Java

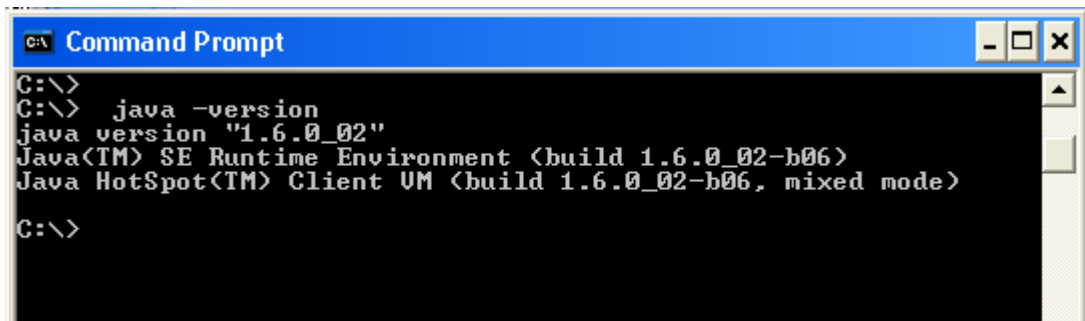
The system is written in the Java programming language. Java is extremely widely used for applications, in web pages etc. It even runs in mobile phones.

*Before you can use CleverClients you need to install java. This normally happens as part of the installation process.*

If CleverClients did not start when you installed it, you should check to see if you have java installed by starting a Command Prompt and typing:

Java -version

Which will produce something like:

A screenshot of a Windows Command Prompt window. The title bar is blue and says "C:\ Command Prompt". The command prompt shows the following text:

```
C:\>  
C:\> java -version  
java version "1.6.0_02"  
Java(TM) SE Runtime Environment (build 1.6.0_02-b06)  
Java HotSpot(TM) Client VM (build 1.6.0_02-b06, mixed mode)  
C:\>
```

If either you do not have java 8 installed or the version is less than 1.8.144 you must install Java. This is usually done by the setup script. You can download the latest version of the Java runtime System (JRE) from the Java site [www.java.com](http://www.java.com).

If you buy a new computer you may have to download the latest version of Java.

## 2.4 Running the demonstration businesses

When you install CleverClients it starts in evaluation mode, and you can look at some example businesses. The differences are the way CleverClients has been configured

You can swap between the businesses by selecting from the **Evaluation** menu.

## 2.5 Configuring Windows

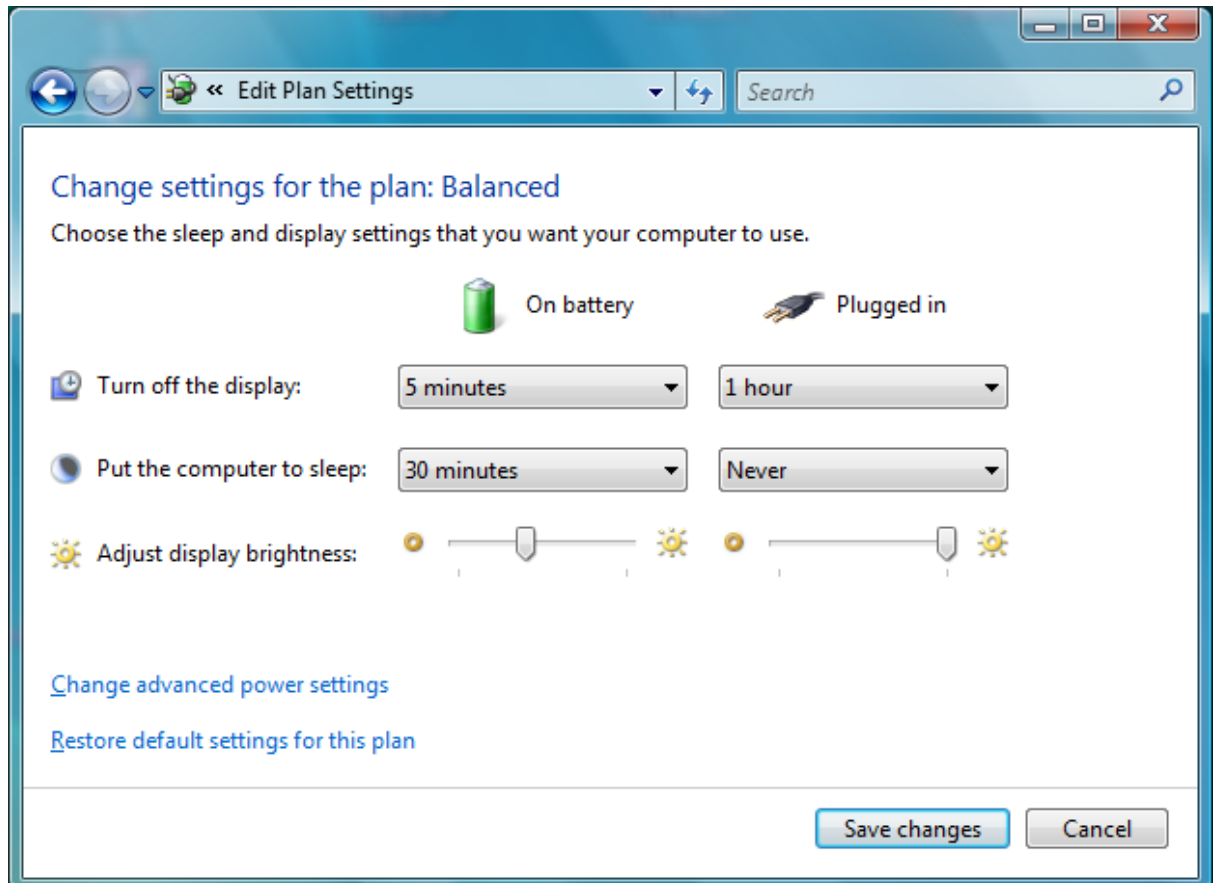
CleverClients continually runs background tasks to:

- Send reminders.
- Clean up the disk
- Backup the database
- Send daily appointment lists
- Etc

For this reason you usually need to have your computer running all the time.

If you have a laptop you should consider plugging it in at home overnight or when in your office and configuring the system for when the background processes are run.

You need to go into the Control Panel, select Power Options, and make sure that powering off is set to “Never”. Restart your computer afterwards.



## 2.6 Automatic Start

We find that Microsoft updates our computer on Saturday nights, and the computer restarts.

This means that CleverClients is not running, so the reminders for Monday are not sent.

You may have noticed that you have a folder called "Startup" in your Programs menu.

Anything you put into this folder, Windows will launch on startup—so setting an app to automatically launch is easy:

First, select the CleverClients icon. Right-click on it and hit "Copy". This will copy the shortcut.

Find the Startup folder in All Programs and right click on it. Hit "Open", and it'll open up in Windows Explorer.

Right click anywhere inside that window and hit "Paste". Your desired program's shortcut should pop right up in the folder, and the next time your computer starts, that program will automatically start up.

## 3.0 THE BASICS

### 3.1 Introduction

When you start the system (by clicking the Demo icon) the main screen appears. You will find that you need to zoom in and out via the “+” and “-” buttons on your PDF viewer to see the detail of some of the pictures in this manual.

The screenshot displays the 'CleverClients Release 2.3' application window. The interface is divided into several sections:

- Left Panel:** A tree view showing a hierarchy of client categories and individual clients. The 'Happy Dwarf' client is selected.
- Client Record Form:** A detailed form for the selected client, 'Happy Dwarf'. It includes fields for personal information (Name, DOB, Address), contact details (Phone, Email), and medical history (Referral, Referral initial, Referral date). It also has a 'Check list' section with checkboxes for various medical conditions and a 'Memo' section with a text area.
- Appointment Section:** A section at the bottom for managing appointments, including fields for 'When' (date and time), 'Status', 'Client group', and 'Service type'.

The 'Happy Dwarf' client record shows the following details:

- Title:** Mr
- Given name:** Happy
- Initials or middle names:**
- Surname:** Dwarf
- Client type:** Insurance
- Client status:** New client
- Referred:** 3 Jan 2014
- Referral initial:** 0
- Cell/Mobiles (comma sep.):** 031898777
- Day phone no:**
- DOB:** 8 Jul 1908
- Organisation:**
- Case manager:** Robinson Crusoe
- Address:** Black Forest Mines
- Resources used:** PAI, PAI-A, BY1, WAIS-III, WISC-IV, WIAT-II, WRAML2, CBCL, TRF, YS-R
- Check list:** Letter to referrer, PAI given, PAI entered, Mid-session letter, Final letter, Exit form, k10
- Memo:** Bullied at mine

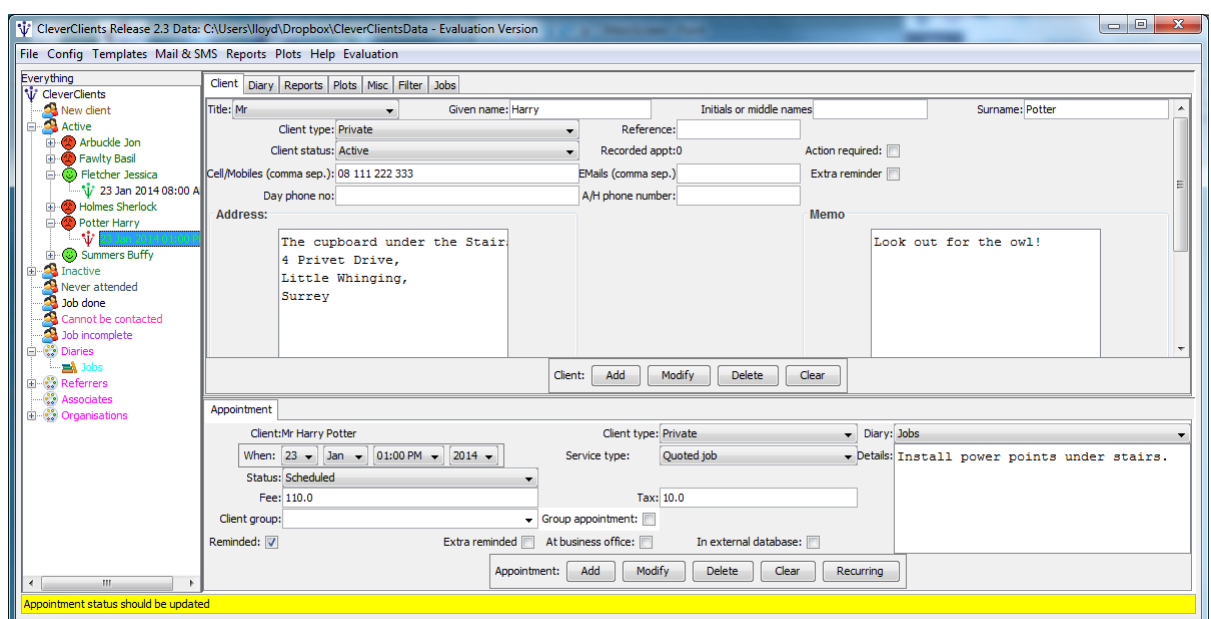
MainScreen.png

The left side of the screen shows your clients and their appointments (with the latest on the top) as a “tree”. You can expand and contract the tree and select clients and appointments in a similar way as how you use Windows Explorer.

The definition of the selected client appears in the right pane with any selected appointment below it.

Definition of clients, appointments etc is done by typing into the appropriate fields and clicking a button to insert into or change values in the database

This is the main screen for the psychologists example business which uses most of the CleverClients facilities. In practice, you may want to “turn off” some of the capabilities to simplify the interface e.g. here is an example business for an electrician who makes appointments to visit his clients to carry out electrical work.



MainScreen2.png

So try defining a new client, using the buttons below the client pane:

Click the Clear button to initialise the fields.

Type the given name and surname.

Select a title (Mr, Mrs etc)

Select a client type e.g. Private.

Click the Add button under the client pane to store the client in the database. The client will appear at the bottom of the tree and a message will appear at the bottom of the window.

Next give the client an appointment:

Select an appointment time.

Most fields will have been filled out according to the client type.

Click the Add button below the appointment pane.

The appointment will appear in the tree and a message will appear at the bottom of the window.

Next try modifying the client. Perhaps enter an Email address.

Click the Modify button below the client pane to store the changes into the database.

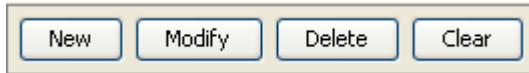
A message will appear at the bottom of the screen.

## **3.2 Tool Tips**

If you “hover” the mouse cursor over a button, field or menu item some text will pop up that will provide some brief information.

## **3.3 Buttons**

Storing of information into the database is controlled by sets of buttons below the relevant fields on the screen (by a field we mean where data such as a name is displayed and entered).



Generally the process is:

- To enter new data (such as an appointment) click the **Clear** button to blank the fields or set them to default values. You can then type values into the fields.
- To actually store some new information (such as a new client) into the database you click the relevant **Add button**.
- To modify a displayed definition type the new values into the fields and then click **Modify** to set the new values in the database.
- To delete the currently displayed definition from the database click the **Delete** button. Hence you could delete a simple definition such as an appointment, but if you delete a client all of its appointments will also be removed. In practice you will seldom delete anything.

The important point is that *there are no changes to the data stored in the database unless you click a button*. This means that if you change your mind after typing in something the original is still stored. There is no “undo” function (unless you restore the database from a backup). Be careful to click from the correct set of buttons.

### 3.4 Colours

The system use the “traffic lights” colouring system. i.e.

Red(ish) is bad



Green(ish) is good (as usually is black)

Orange(ish) is somewhere in between

For example, if you type clear to input a new client the two name fields that must be entered are coloured red and other fields that you should enter (but can leave for now) appear yellow.

Similarly the appointments in the tree should be green. If not some data has to be modified. Client names are also coloured in the tree.

The text used in the tree for clients, appointments and services is colored according to status. The colours used can be listed from the Help menu.



The icons are coloured in the tree to indicate when there is a problem (you can display a validation report, probably for all clients and their appointments to find what is wrong).

### 3.5 Error Messages

Messages appear at the bottom of the window when you initiate a process e.g. click a Add button.

Messages are coloured as above i.e. green if successful, yellow if successful but you should do something, and red if the operation failed and you need to fix the problem.

### **3.6 Screen Layout**

The screen has been designed to run on our old low resolution monitors.

You can use the usual operations of making the window full screen if you too cant afford the latest, or can expand it to a larger size.

You can also “drag” the bars to make the tree wider or to change the size of the appointment area.

So far we have only discussed clients and their appointments, but you can click on the “tabs” to show other information.

Hopefully this is all standard information as far as you are concerned.

### **3.7 Nagging**

The philosophy of the system is that you are seldom forced to do anything, but if you should, something (usually a field and the tree) will be coloured yellow. If you must do something it is coloured red.

For example, you will often enter a new client and a first appointment without knowing much about them so fields like date of birth could be yellow.

For example you don’t have to input the fee for an appointment, but if you don’t the fee field will be yellow, and after saving into the database the appointment icon in the tree

will also be coloured. However, should you display a report of your income it will not be accurate.

The aim is to have everything in the tree coloured green!

### 3.8 Configuration

The system can be configured for your type of clients and the way that you work. This will be covered later, but briefly, the system is controlled by “configuration files”.

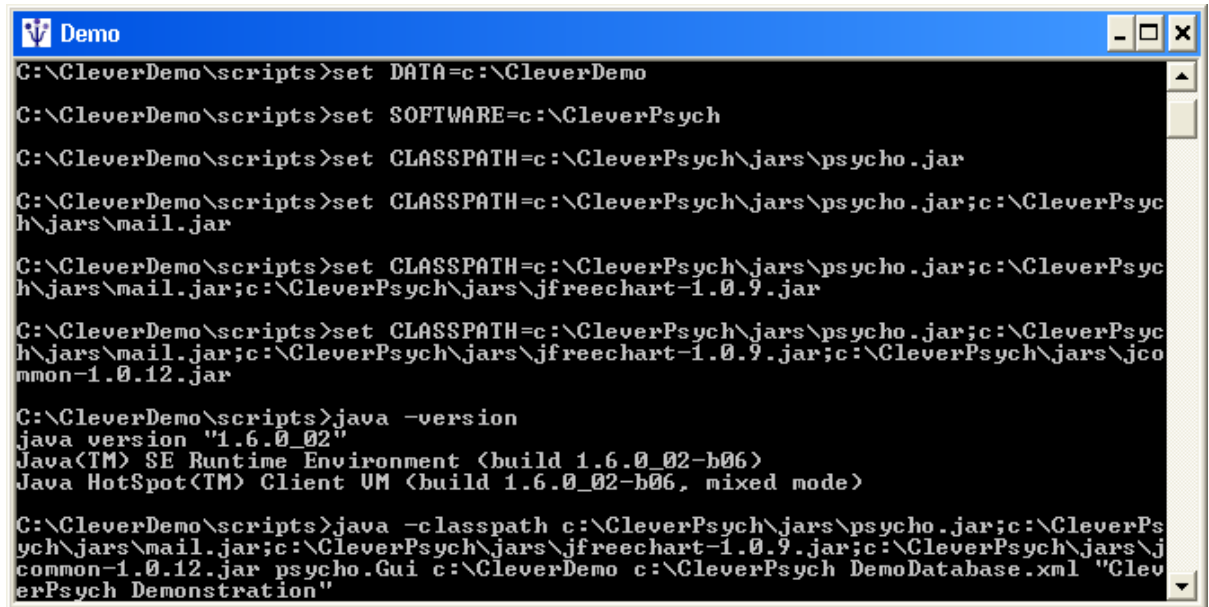
For example a client’s title (Mr, Mrs etc) is chosen from the pulldown in the Client definition pane which is loaded from a configuration file. You can change the list by editing the file.

For example if Captain Kidd walks through you door you can add “Captain” to the configuration file (and hence to the pulldown list). Then you can use his title when adding him as a client.



### 3.9 Command Window

When you start the system a command prompt window also appears.



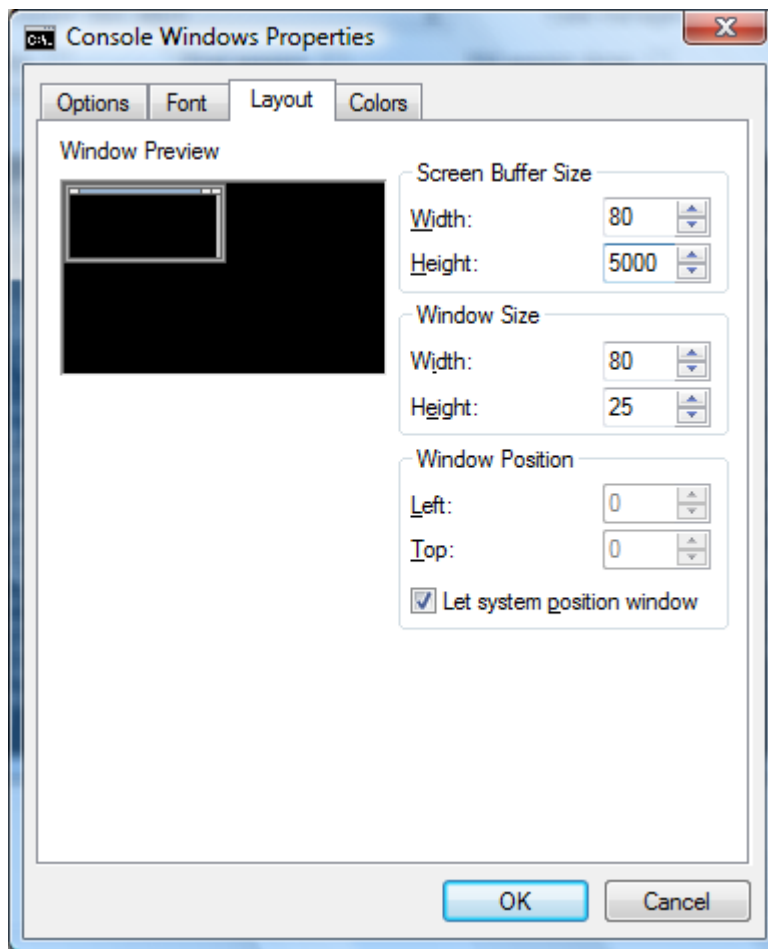
```
C:\CleverDemo\scripts>set DATA=c:\CleverDemo
C:\CleverDemo\scripts>set SOFTWARE=c:\CleverPsych
C:\CleverDemo\scripts>set CLASSPATH=c:\CleverPsych\jars\psycho.jar
C:\CleverDemo\scripts>set CLASSPATH=c:\CleverPsych\jars\psycho.jar;c:\CleverPsych\jars\mail.jar
C:\CleverDemo\scripts>set CLASSPATH=c:\CleverPsych\jars\psycho.jar;c:\CleverPsych\jars\mail.jar;c:\CleverPsych\jars\jfreechart-1.0.9.jar
C:\CleverDemo\scripts>set CLASSPATH=c:\CleverPsych\jars\psycho.jar;c:\CleverPsych\jars\mail.jar;c:\CleverPsych\jars\jfreechart-1.0.9.jar;c:\CleverPsych\jars\jcommon-1.0.12.jar
C:\CleverDemo\scripts>java -version
java version "1.6.0_02"
Java(TM) SE Runtime Environment (build 1.6.0_02-b06)
Java HotSpot(TM) Client VM (build 1.6.0_02-b06, mixed mode)
C:\CleverDemo\scripts>java -classpath c:\CleverPsych\jars\psycho.jar;c:\CleverPsych\jars\mail.jar;c:\CleverPsych\jars\jfreechart-1.0.9.jar;c:\CleverPsych\jars\jcommon-1.0.12.jar psycho.Gui c:\CleverDemo c:\CleverPsych DemoDatabase.xml "CleverPsych Demonstration"
```

This window shows the commands that are run to start up CleverClients. More importantly *it will display error messages* if there is something wrong with your system.

You can change the properties on the icon (right click) so the window is minimized.

The default window does not show many lines. You can click on the top left icon to show the properties and then increase the default maximum lines (e.g. to 5000 as below). You may want to change the font size too.

You can use the Edit menu to select all and copy. Then you can paste the contents into an Email if you need to advise of a problem.



### 3.10 Licence

The software is now free. No licence is required..

## 4.0 CLIENTS AND APPOINTMENTS

### 4.1 Introduction

The first you hear of a new client is usually when they ring for an appointment for you to provide a service. For example if a new client Santa Claus rings and says he wants your company to service his car, you can click the client Clear button and type in the minimal information for the client and click Add, and then enter an initial appointment in a similar way.

The screenshot displays the 'CleverPsych Demonstration' software interface. The top menu bar includes 'File', 'Config', 'Office', 'Mail & SMS', 'Reports', 'Plots', and 'Help'. Below the menu is a search bar with 'From' (1 Jan 2008) and 'To' (18 Apr 2008) date pickers, a 'Client type' dropdown (All), a 'Status' dropdown (All), a 'Client' text field, and 'Filter' and 'Exit' buttons.

The main window is divided into several sections:

- Client List (Left):** A list of clients under the 'Psycho' category, including 'Claus Santa', 'Duck Daisy', 'Duck Donald', 'Dwarf Grumpy', 'White Snow', and 'aaaaaaa aaaa'.
- Client Form (Center):** A form for editing client information. Fields include: Title (Mr), Given name(s) (Santa), Surname (Claus), Client type (BOIMHI), Reference number (highlighted in yellow), DOB (1 Jan 1900), Day phone no., A/H phone number, EMail (santa@xmas.com), Mobile, K10 pre/post, Occupation (Sleigh Rider), Paperwork done, Final session, Mid session done, Action required, Referred by (Dr Henry Jekyll), Current ref (8 Apr 2008), Recorded appointments (0), Current ref appointments (0), and Marital status (Married). There are also checkboxes for 'New', 'Modify', 'Delete', and 'Clear'.
- Tests given (Bottom Left):** A table with columns 'Name' and checkboxes for various tests: PAI, PAI-A, BYI, WAIS-III, WISC-IV, WIAT-II, and WRAML2.
- Check list (Bottom Center):** A table with columns 'Name' and checkboxes for various tasks: Letter to referrer, PAI given, PAI received, PAI entered, Mid-session letter, Final letter, and Exit form.
- Address (Bottom Right):** A text field containing 'North Pole'.
- Memo (Bottom Far Right):** A text area containing 'Apperently has a weight problem'.

At the bottom, there is an 'Appointment' section with fields for 'Client: Mr Santa Claus', 'When: 9 Apr 06:00 PM 2008', 'Client type: BOIMHI', 'Status: New patient', 'Service number', 'In external database', '\$Fee: 110', '\$Tax: 0', and 'Group appointment'. It also has 'New', 'Modify', 'Delete', and 'Clear' buttons.

A status bar at the very bottom shows 'Appointment added'.

The first thing you will notice is that some fields are yellow signifying that you should enter some value. Which fields are required are specified when the client type is defined. Most government and insurance types will require a reference number. There is much more said about this later.

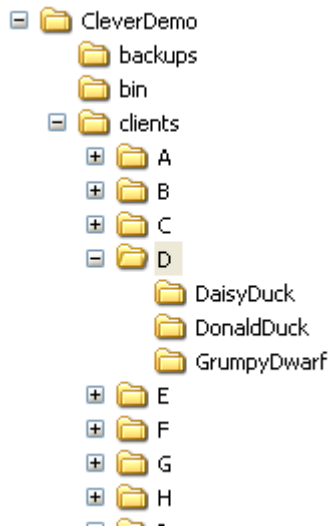
## **4.2 Clients**

Hopefully most client fields are obvious, but some other details are:

- The given name and surname fields must be given as together they uniquely identify the client. We usually use just one given name. If by chance you have two clients with the same name you have to differentiate between them e.g. give an initial or second name.
- The mobile phone numbers are used for sending reminders, so input them if you can. Usually there is just one mobile number, but you can provide more, separated by commas, if the reminder should go to more than one person.
- The Email is used for reminders if there is no mobile number.
- The memo field can be used for a quick reminder. If the action reqd flag is ticked the client will be coloured in the tree.
- A check list can be set up to remind you of the procedure you have done. We would often send an acknowledgement letter to the doctor, give a PAI at the first appointment, send a mid-session letter requesting further treatment, and have some final administration after the final session.

## **4.3 Client Directories**

When you create a client a directory is set up for them under the clients directory.



To allow for the large number of clients in your business, the directories are actually stored under another level of directories that is the first letter of the surname (if you change a client's name you will have to manually move the directory).

You can use these directories to store any client files. CleverClients stores client files such as letters there.

## 4.4 Appointments

Appointments are identified by their time.

As with clients, there are some subtleties about the appointment fields.

The appointment status has fixed values and has to be reset after the appointment:

- New client – indicates a first appointment.
- Scheduled – a new appointment.
- Paid cash – a cash client attended and paid. Used for income that does not appear on your bank statements.
- Paid cheque – a cash client attended and paid with a cheque.



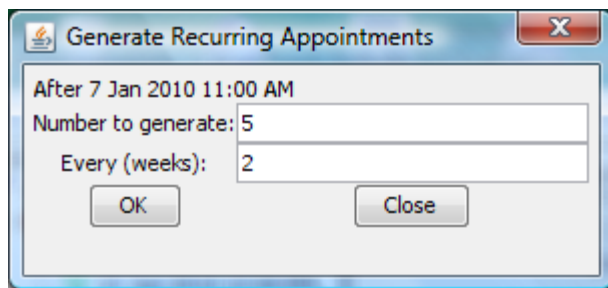
- Paid card – a cash client attended and paid with a credit card.
- Paid other – a cash client attended and paid by some other means.
- Owed – a cash client attended but did not pay. The tree icon is red.
- No show – did not turn up. This is a major problem. See reminders later.
- Cancelled – phoned to say they could not come. You usually do this rather than delete the appointment as it indicates unreliable clients.
- Claimed – you have submitted a claim for payment to the government or insurance company. The system will indicate when you have been slack and have not claimed within a reasonable time.
- Attended – the client came to the appointment (you may need to claim)
- Invoiced – you have sent an invoice.
- Rejected – your claim or invoice was rejected and you need to send a revised one.

Details of other appointment fields are:

- Fee and tax are loaded with values defined in the configuration, but you can change them. Tax to us is the Goods and Services Tax (GST) which applies to some services. We record GST as 10% on top of the basic fee, but you can handle tax any way you like (consistently!) e.g. included in the fee.
- Client type is set to that of the client. However the type can change e.g. someone may first attend as a private patient and then go to a doctor and enter a government scheme. This field enables old appointments to display their type at the time.
- Service number is a configured list of government or insurance service identifiers.
- Reminded tells if a reminder has been sent to the client.

- In external database can be used when you have to enter appointment details in a government database.
- Group appointment can be set to enable more that one client to attend at the same time. Normally the system will only allow one appointment at a time.

You can generate a sequence of appointments by creating a new appointment that is the first in the sequence (get it right!) and then clicking the Recurring button to display the dialog:



## **5.0 DIARIES**

### **5.1 Introduction**

A diary typically shows the appointments for one member of staff, and there must be at least one diary.

A sole operator business will probably have just one diary that shows the appointments made (for times the owner will visit clients or when they will come to the office).

There are many reasons why there would be more than one diary, and some are:

- A sole operator may work at more than one office on different days of the week and have a diary for each location.
- A business may have several staff, each of whom has a diary.
- A business may operate an answering service for tradesmen, and have a diary for each of them to schedule their work.
- A business may have teams of workers and have a diary for each team (and can move workers between teams as required).

### **5.2 Diary Definition**

Diaries are defined using the diary tab.

The main field is the identifier. This is the name that appears on the tab at the top and against the appointment. When the Clear button is clicked in the

appointment tab, the currently selected diary is what appears (and it can be changed).

Each diary has a main person defined. This is often a single worker, but as a diary can reference a group of staff / workers it should be the foreman or main contact.

Daily work lists can be sent to the works in a diary so a cell phone (for SMS) and Email addresses should be given. Where there are several workers the phone numbers and emails should be separated by commas e.g. “06 123 456 789, 06 987 654 321”

The tick box at the bottom must be set to indicate if the workers usually go to the client’s premises or if the client will attend at the business office (clinic etc).

You cannot delete a diary, as it is probably referenced by appointments in your database; instead set it to disabled.

For example, here is a diary for sole trader or single employee who is a mechanic, so clients bring their cars to his workshop.

Client	Organisation	Diary	Reports	Plots	Misc	Filter	Fred	Sally
--------	--------------	-------	---------	-------	------	--------	------	-------

Title: Mr

Identifier: Fred

Given name: Fred

Surname: Spannerhand

Business: Superior Mechanics Ltd

Cell/Mobiles (comma sep.): 05 987 654 324

E-mails (comma sep.): superior.motors@gmail.xyz

Reference:

Appointments at business office: ☒

Address

123 Main Street,  
Hicksville,  
New York.

Disabled: ☐

Notes

Diary: Add Modify Clear

DiarySingle.png

Another example is for a team of cleaners who go to clients houses. Every worker has a phone number recorded for SMS and an Email so they can be sent daily lists of clients to visit.

Client	Organisation	Diary	Reports	Plots	Misc	Filter	Business Team	House Team
--------	--------------	-------	---------	-------	------	--------	---------------	------------

Title: Mrs

Identifier: House Team

Given name: Grumpy

Surname: Dwarf

Business: Shiny Clean Ltd

Cell/Mobiles (comma sep.): 05 764 678 526, 05 645 678 455, 05 836 444 836

E-mails (comma sep.): grumpy@hotmail.ccc, happy@gmail.com.xx, dopey@gmail.com.xx

Reference:

Appointments at business office: ☐

Address

123 Nelson Street,  
Mayfair,  
London.

Disabled: ☐

Notes

Team that cleans mainly houses

Leader: Grumpy

Staff: Happy, Dopey

Diary: Add Modify Clear

DiaryTeams.png

The appearance of the diary is defined in the main configuration file. See later:

# Diary definition. Range 1 to 23. Interval must be 10,15,20,30 or 60

Diary min hour=7

Diary max hour=20

Diary interval minutes=30

### 5.3 Using Diaries

Often small businesses are run with a diary and a phone.

Clients ring to make appointments, often at odd hours, and the new appointment is written into the diary. At a convenient time the appointment (and new client information) are entered into CleverClients.

Hence the diary is often the ultimate record of activities within the business.

There may also be a secretary who enters everything into CleverClients.

CleverClients provides a diary view of appointments and services. You can use it to select appointments and to set appointment times, but the ultimate use is as a check that you have entered data correctly.

*Hence the CleverClients diary should look the same as your paper one.*

Times	Mon 13 Jan 2014	Tue 14 Jan 2014	Wed 15 Jan 2014	Thu 16 Jan 2014	Fri 17 Jan 2014	Sat 18 Jan 2014	Sun 19 Jan 2014
10:00 AM							
10:30 AM							
11:00 AM							
11:30 AM			Group appointment				
12:00 PM							
12:30 PM							
01:00 PM							
01:30 PM		Golf					
02:00 PM							
02:30 PM							
03:00 PM				Mr Grumpy Dwarf	Cancelled		
03:30 PM							
04:00 PM							
04:30 PM							
05:00 PM							
05:30 PM		Golf					
06:00 PM							
06:30 PM							

DiaryCrazy.png

You select the named diary tab to see the current diary page.

Diary entries change as you define and modify appointments and services:

- Appointments are shown as the client name.
- Services are displayed as the type e.g. Forensic report or as
- Group appointments are shown as “Group”.
- Cancelled appointments are shown as “Cancelled”. You can assign these times to someone else.

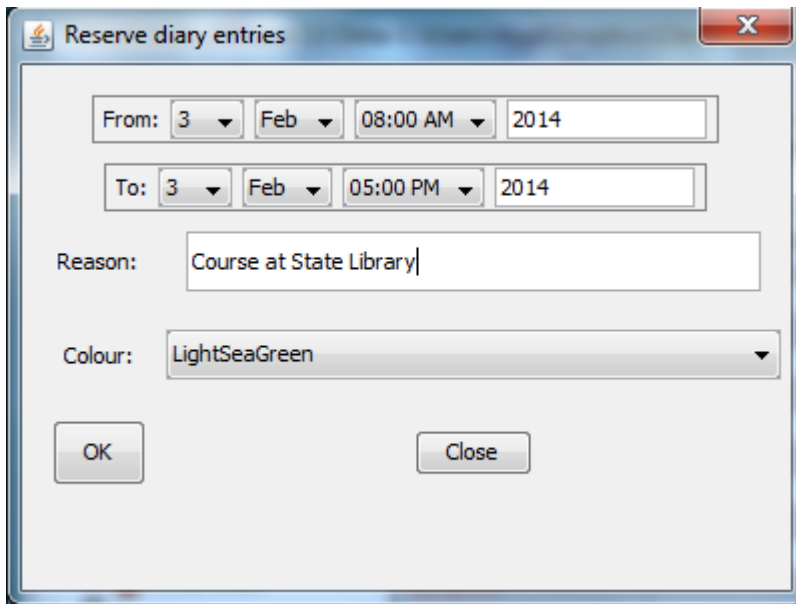
Problem entries are coloured.

When you select an appointment or service in the tree the relevant diary page will be shown. You can skip weeks backwards or forwards by clicking the arrow buttons. You can also input a date and click the Page button to skip to the page containing that date.

If you click on a “Group” appointment entry a list of the clients will pop up and you can select a client’s appointment.



You can reserve a period of time by clicking the Reserve button to display the dialog:



ReserveDialog.png

You give the time range and reason.

The diary will be coloured and the reason displayed.

Reserved slots act as a background and appointments and services within the range will still appear.

You can remove a reservation by clicking in the range and using the Unreserve button.



## 6.0 REFERRERS

People who refer clients to you are defined in the “Referer” tab and are defined in a similar way to clients and appointments.

You use the Clear and Add buttons to enter a referrer and the Modify button to put any changes into the database in the usual way.

Client	Referer	Associates	Organisation	Diary	Reports	Plots	Misc	Filter	Nutt	Crazy
<div><div><div>Title: Dr</div><div>Given name: Henry</div><div>Surname: Jekyll</div><div>Ref number: MC2834549</div><div>Business: Metropolis South Medical Centre</div><div>Phone no: 122 98735</div><div>FAX: 122 9865</div><div>E-Mail: henry.jekyll@myisp.net</div></div><div>Notes</div><div>Dont visit at full moon.</div><div>Address</div><div>1 Memory Lane, Hyde Park, London.</div><div>Referrer: <input type="button" value="Add"/> <input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Clear"/></div></div>										

referrer.png

After referrers have been defined they appear in the tree, and also in the pulldown on the client pane so they can be referenced by clients.

To modify the definition of a referrer choose from the pulldown in the client pane.

When a client is chosen any referrer is displayed in the referrer pane.

We expect that you will only have a small number of referrers.

You should not delete a referrer if it is referenced by a client.

Referrers are identified by their name and reference / provider number. You can have more than one entry for a doctor who works at several medical practices, and has a different provider number for each practice. Similarly for people who refer to your business.

## 7.0 ORGANISATIONS AND ASSOCIATES

Organisations that ask you to provide services or to see clients are defined in the “Organisations” tab and are defined in a similar way to referrers.

Associates are people who you do business with (other psychologists, psychiatrists, parole officers etc).

You use the Clear and Add buttons to enter an organisation and the Modify button to put any changes into the database in the usual way.

The screenshot displays a software interface with two main sections. The top section is the 'Organisation' tab, which contains a form for entering organisation details. The form includes fields for Title (Ms), Contact given names (Mary), Contact surname (Christmas), Department, Organisation (North Pole Insurance), Phone no (12 345 678), FAX, EMail, and Business number. To the right of these fields is an 'Address' field containing the text '55 Pole Street, Far North, Artica'. Below the form are buttons for 'New', 'Modify', 'Delete', and 'Clear'. The bottom section is the 'Appointment' tab, which shows a client named 'Ms Snow White'. It includes a 'When' field with a date and time (13 Mar 06:00 PM 2009), a 'Service type' dropdown (Neuropsych report), a 'Status' dropdown (Done), a 'Service number' field, a 'Fee' field (500), and a 'Tax' field (50). To the right of these fields is a 'Details' field containing the text 'Court case scheduled for 1 April'. Below the form are buttons for 'New', 'Modify', 'Delete', and 'Clear'.

After organisations have been defined they appear in the tree and in the pulldown on the client pane so they can be referenced by clients.

To modify the definition of an organisation choose from the pulldown in the client pane.

When a client is chosen any referenced organisation is displayed in the referrer pane.

We expect that you will only have a small number of organisations.

You should not delete an organisation if it is referenced by a client.

Associates are handled in a similar way to organisations and referrers.

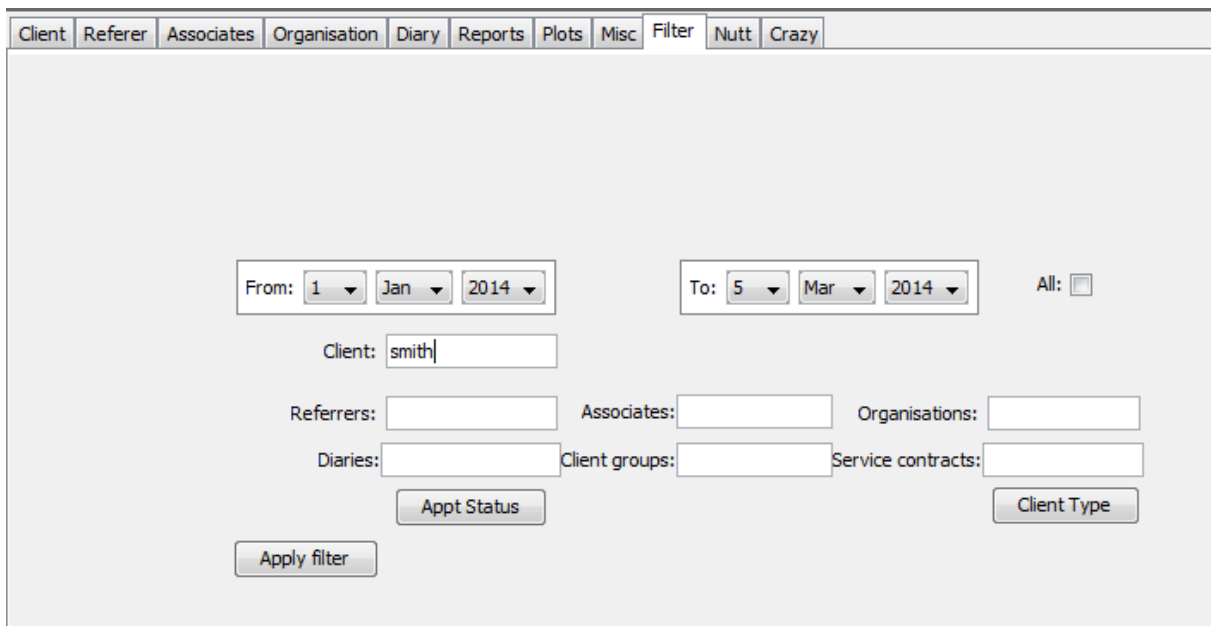
## 8.0 FILTERING

The tree usually displays a subset of your appointments and provided services; typically just the past month (the demo system is a special case and displays so all the example data appears).

This has the effect of making the tree much smaller and makes it easier to select appointments and clients.

A major reason for filtering is that it defines the data to be processed e.g. you may wish to display your income when you are doing your Tax return. In that case you set the time range to the financial year, filter, and then display the report.

You can specify the appointments to be displayed and processed by setting values in the Filter tab.



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Client, Referer, Associates, Organisation, Diary, Reports, Plots, Misc, Filter (which is the active tab), Nutt, and Crazy. Below the tabs is a large light gray area containing a filter form. The form includes the following elements:

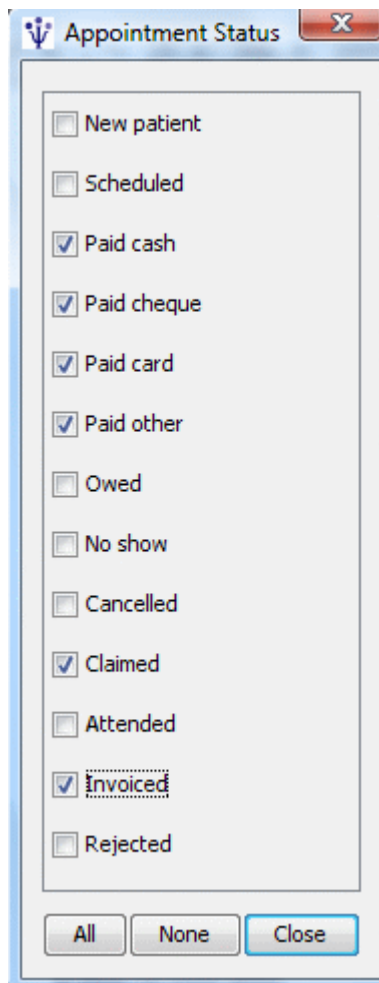
- From:** A date range selector with dropdowns for day (1), month (Jan), and year (2014).
- To:** A date range selector with dropdowns for day (5), month (Mar), and year (2014).
- All:** A checkbox.
- Client:** A text input field containing the text "smith".
- Referrers:** A text input field.
- Associates:** A text input field.
- Organisations:** A text input field.
- Diaries:** A text input field.
- Client groups:** A text input field.
- Service contracts:** A text input field.
- Appt Status:** A button.
- Client Type:** A button.
- Apply filter:** A button at the bottom left of the form area.

Filter.png

The various fields are used as follows:

- Date range – retrieves appointments and services with dates within the range.  
Also retrieves clients who have their current referral date within the range.
- Client type – displays a dialog from which types can be selected.
- Appointment Status – displays a dialog from which status can be selected.
- Service Status – displays a dialog from which status can be selected.
- Client – retrieves clients who have the typed string in their name (case insensitive)
- Referrer – retrieves referrers who have the typed string in their name (case insensitive)
- Organisation – retrieves organisations that have the typed string in their name (case insensitive)
- All – is a quick way of showing everything in the database. This also retrieves clients who have no appointments.

Clicking some buttons display a dialog from which several types or status can be selected. The selection remains until changed.



Be aware that the client icons in the tree are coloured according to whether the client and all appointments are valid. This means that the client can be coloured red, but the displayed client fields are all valid and the displayed appointments and services are green. This means that some appointment or service that has been filtered out has a problem.

## **9.0 WORD PROCESSOR**

### **9.1 Introduction**

You can generate letters in your word processor by selecting the relevant appointment or service in the tree and then selecting a type of letter from the Word menu.

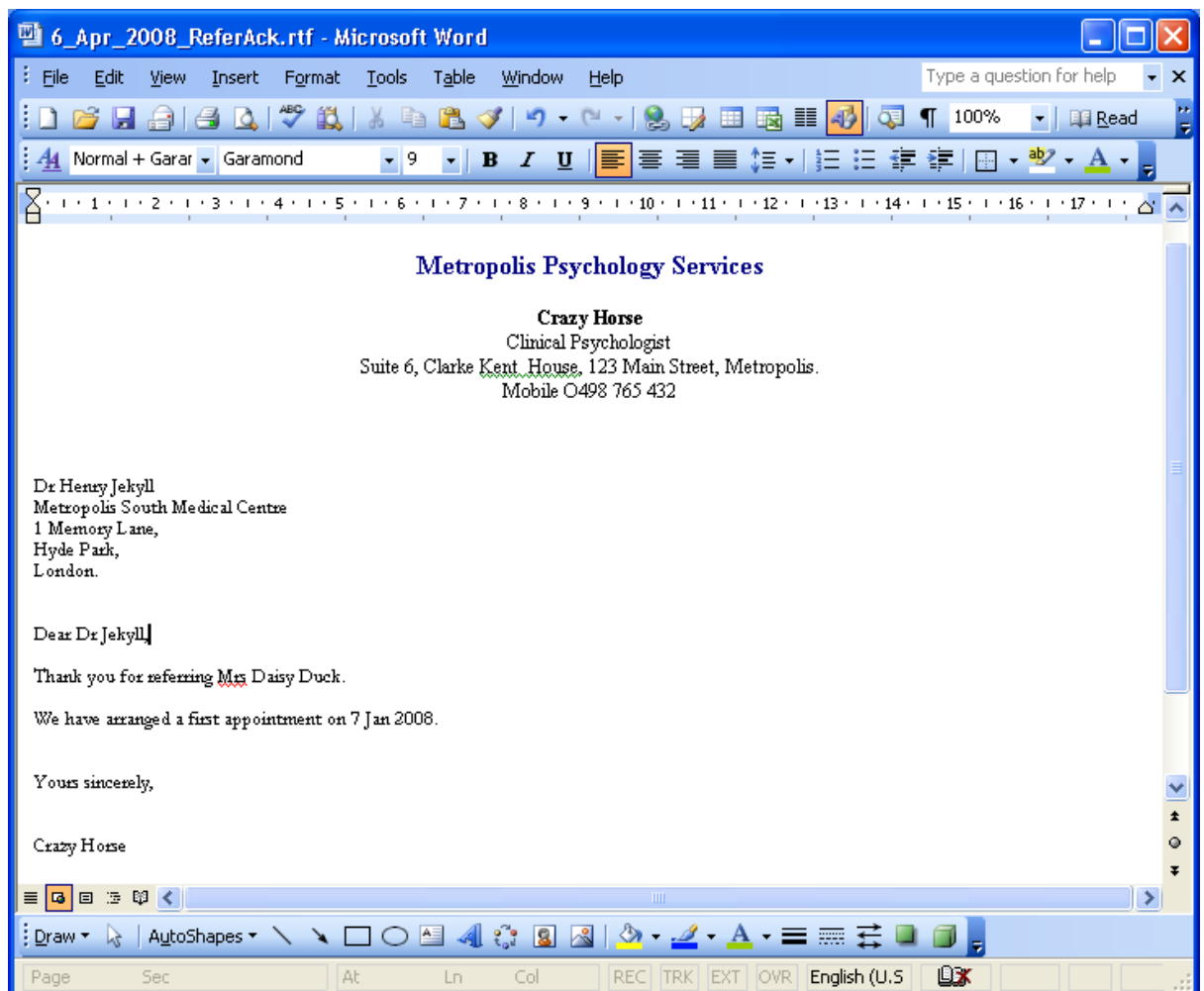
The letters are actually generated using template files in Microsoft rich text format which contain known text strings that are replaced by values from the selected client, appointment, service or referrer. You don't have to use RTF files; any non-binary file type is OK. Binary types such as DOCX are not suitable.

You should be able to use a variety of word processors such as Microsoft Word and OpenOffice.

### **9.2 Example**

The following letter was generated by selecting Daisy Duck's first appointment and then selecting "Referrer acknowledgement" from the Office menu.





We cover in more detail how to generate template files for your own letters and how to add the letters to the Office menu later.

*If a letter does not appear in your word processor when you try an example it means that CleverClients cannot find your word processor. The system will try and use wordpad (from Start->All Programs->accessories) as a last resort. See the configuration chapter.*

## **10.0      REPORTS**

### **10.1      Introduction**

The CleverClients system can generate several reports. The process is:

- Filter to get the data that you wish to report on.
- Select a report from the report men
- The report will be displayed in the Report tabbed pane.
- Select the “Word” item from the Report menu if you wish to load it into your word processor (and hence into another report).

### **10.2      Example**

If you select the Clients report you will see something like the following:



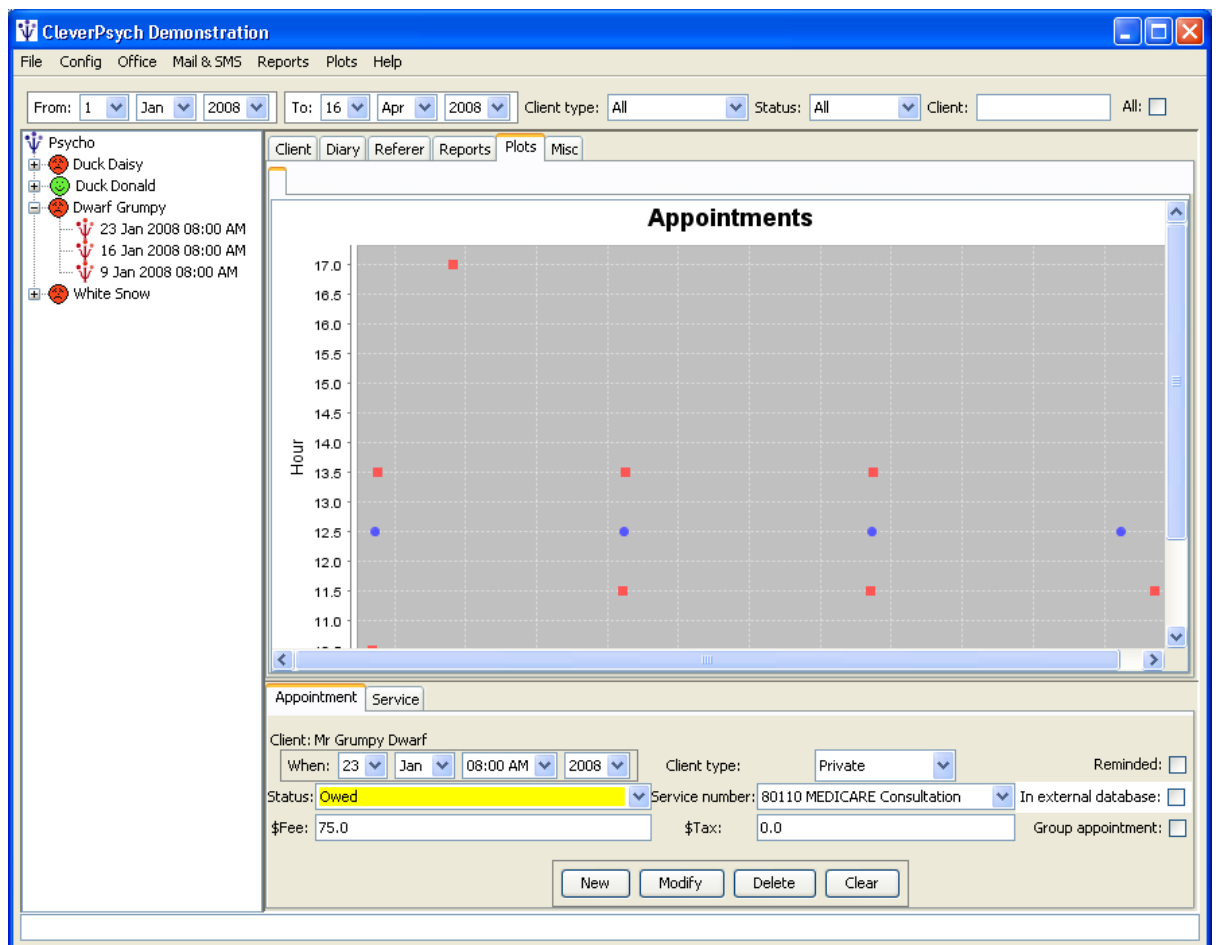
Every report is written to a file Report.rtl in the tmp directory, and selecting the Word menu item simply reads that file into the word processor. You will probably find that only one report can be loaded into the word processor at a time.

## 11.0 PLOTS

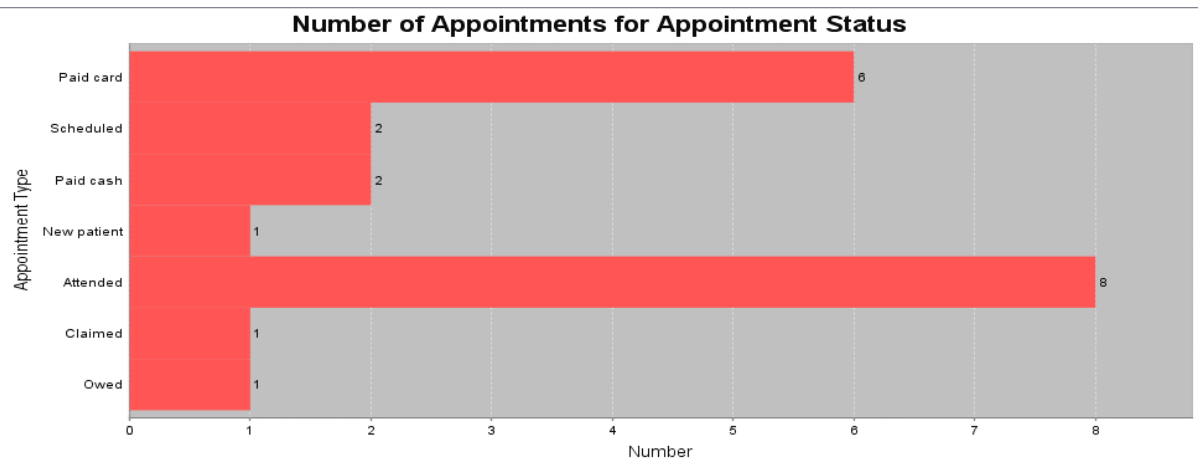
Plots and histograms can be produced in much the same way as reports i.e. filter to display the appointments and services you are interested in and then select a type of diagram from the Plots menu.

The plots appear in the Plots tabbed pane.

For example, if you select the “Plot appointments” menu item you will see something like the following:



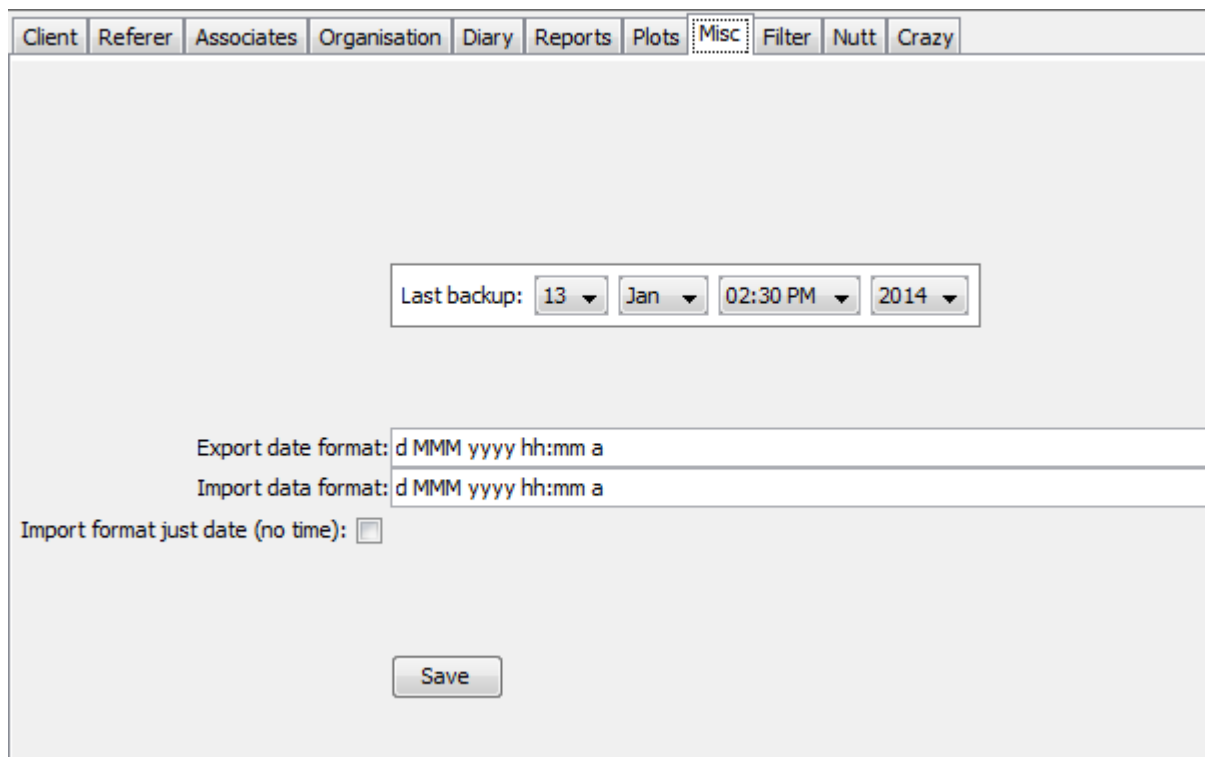
Several types of histograms can be displayed too:



## 12.0 MISCELLANEOUS OPTIONS

### 12.1 Introduction

The “Misc” tabbed pane contains the “odds and ends”. Currently this is reminders to do backups and parameters for importing basic data.



Client	Referer	Associates	Organisation	Diary	Reports	Plots	Misc	Filter	Nutt	Crazy
--------	---------	------------	--------------	-------	---------	-------	------	--------	------	-------

Last backup: 13 Jan 02:30 PM 2014

Export date format: d MMM yyyy hh:mm a

Import data format: d MMM yyyy hh:mm a

Import format just date (no time): ☐

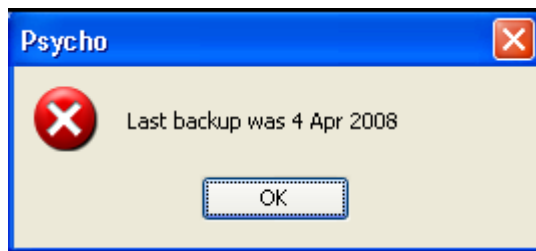
Save

Misc.png

### 12.2 Backups

While we know that you diligently back up your data, we suspect that not everyone does so.

You enter the date into the Misc pane when you do a backup, and the system will remind you to do another one after a few days. The number of days is a configuration item and is usually set to 7.



We suggest that you back up your system at least once a week, so when the disk on your computer has a psychotic episode you can reinstall your software and data onto a new disk having only lost a few days appointments and clients.

We backup using CD's, and the procedure on Windows Xp is:

- Put a new CD into the drive.
- A window pops up, and select "Open writable CD folder using Windows Explorer". This gives you an Explorer window for the CD drive.
- Open another Explorer window, probably for the C: drive.
- Drag the folders you want to back up into the CD driver window. You need your data directory e.g. CleverClientsData and probably the CleverClients folder. Backup anything else of value too.
- You will have to wait for files to be copied.
- When all folders are in the CD Drive Explorer window select "Write these files to CD" and the CD Writing wizard appears which controls the actual writing.



We suggest that you sometimes check that the data are actually on the CD. There have been many cases where, after some disaster, it has been found that the data could not be recovered from the backup.

You should keep your backup CD's somewhere away from your computer so that when your office burns down you still have your data. If you use a laptop and take it home don't keep your CDs there. You get the idea.

These days we suggest you put the CleverClientsData folder on a **Cloud service** folder like Dropbox so you do not have to backup very often.

### **12.3 Importing Appointments**

**This is currently not available, pending a more extensive implementation.**

There is a very basic facility for importing clients and appointments where you already have them on your computer in some form. This is designed to be used when you begin to use CleverClients.

You use the "Comma Separated Values" (CSV) format that is supported by spreadsheets. The aim is to set up your data in a spreadsheet in the supported way, export it as a CSV file and then import that file into the system.

If you have your data in a file e.g. a report, you can turn it into a CSV file with say NotePad, import it into Excel, manipulate it, and output it as a CSV file for importing. If the report is in word format, export it as a text file.

Confused? The best way is to start with the demo system:

Select the File->Export menu item. This will write the file CleverDemo\tmp\Export.csv and load it into your spreadsheet.

```

Given Name, Surname, Reference,,,,,,,,
Daisy,Duck,,7 Jan 2008 12:00 PM,9 Jan 2008 03:30 PM,14 Jan
2008 12:00 PM,21 Jan 2008 12:00 PM,28 Jan 2008 12:00 PM,
Donald,Duck,,7 Jan 2008 09:00 AM,9 Jan 2008 03:30 PM,14 Jan
2008 10:00 AM,21 Jan 2008 10:00 AM,29 Jan 2008 10:00 AM,
Grumpy,Dwarf,,9 Jan 2008 08:00 AM,16 Jan 2008 08:00 AM,23 Jan
2008 08:00 AM,
Snow,White,XX54343646,7 Jan 2008 11:00 AM,14 Jan 2008 11:00
AM,21 Jan 2008 11:00 AM,28 Jan 2008 11:00 AM,

```

The file gives the spreadsheet column values row by row, where the values are separated by columns. There are only a few columns supported, which are in order:

- Given name
- Surname
- Reference number
- Repeated appointment date and times (for each)

This is extremely simple but does enable existing appointments to be entered.

To load the data into your database

- Delete the existing database (we assume you are just starting).
- Start CleverClients
- Select File->Import menu item and choose the CSV file.
- The data will appear in the tree.
- You then have to add client data and referrers.

The main problem is that your CSV file could have dates in various formats. You can define the formats you want to use in the Misc panel. You can give both import and export formats.

If your data has appointment dates but not times, you can set the flag in the Misc panel. In this case times will be given as the appointments are entered.

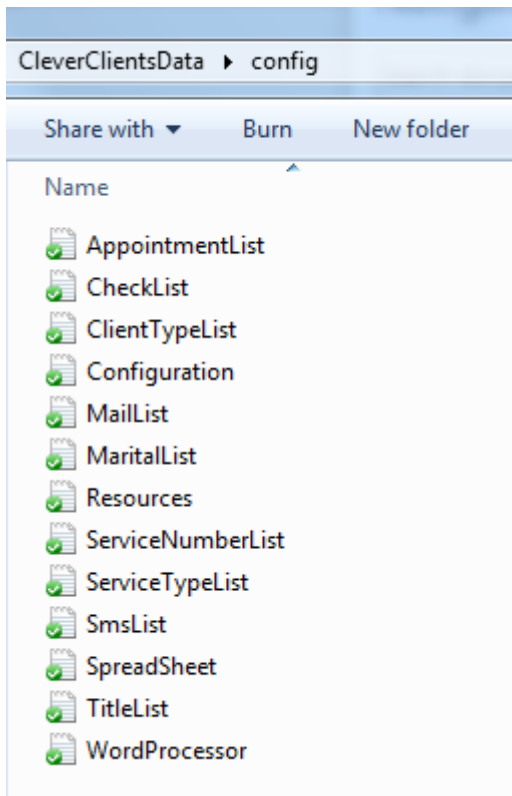
Date formats are those used by the Java SimpleDateFormat class. Some of the documentation is in an Appendix. You can also google to find out more.

For example CleverClients uses the format “dd MMM yyyy hh:mm a” which prints dates and time in the form 25 Dec 2003 10:30 AM.

## 13.0 CONFIGURATION

### 13.1 Introduction

Much of the behaviour of the system is controlled by several configuration files, which are held in the CleverClientsData\config folder.



ConfigDir.png

You usually change the files by selecting from the Config menu. You can also edit them directly with a text editor such as wordpad (from the Start->Accessories list) or with Word.

When you edit a configuration file, the changes may be applied immediately, but *often you need to restart CleverClients.*

You should be careful about deleting items from a configuration file. Make sure that they are not being referenced by something in the database. For example, if you added “Sir” to the titles configuration file to enter Sir Les Patteson, its not a good idea to remove it later.

Many config files provide a list that appears, or from which you can select, in the panes. You should also order the list as appropriate.

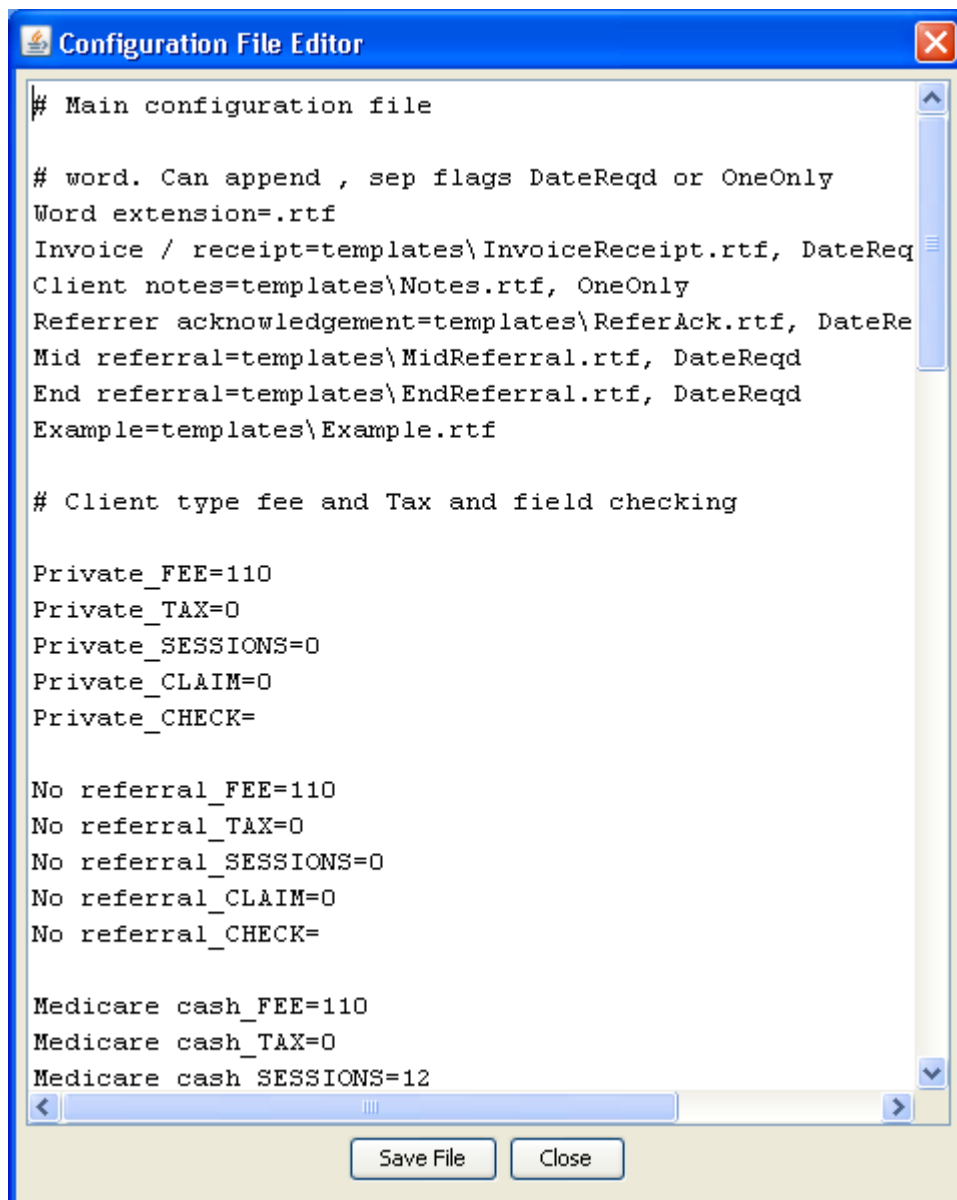
## **13.2 Main Configuration**

Most of the system specifications are held in a single configuration file Configuration.txt.

When you first use CleverClients you should edit this file and look at the instructions for configuring it for your business.

Entries are on a single line:

- Lines starting with # are a comment. Rather than deleting lines you should consider “commenting them out” as configuration items have a habit of coming back.
- Lines have the format NAME=VALUE
- When there are multiple values they are commas separated. This will become obvious later.



Many of the entries are described later, but some extraneous ones are:

- Diary definition. Range 1 to 23. Interval must be 10,15,20,30 or 60

Diary min hour=7

Diary max hour=20

Diary interval minutes=30

- Keep backups=31 – The system automatically backs up your database into the backup directory. This is the number of days those backups are kept (here a month)

- Keep tmp=7 – The system writes some temporary files into the tmp directory.  
This is the number of days those files are kept (here a week)
- Keep logs=7 – Some logs are generated in the logs directory. This is the number of days to keep the logs.
- Backup period=7 – When you backup your system you should enter the date into the Misc panel. The system will remind you to do another after this number of days. Set to larger value if you use e.g. Dropbox.
- Information about you, for example:

Business Name = The Funny Farm Ltd

Business Mail = crazy@gmail.xyz

Business Phone = 0598765432

Business Fax = 12344321

Business Address = 123 Main Street, Hicksville, New York.

Business contact Full Name = Dr Crazy Horse

Business reference number = ABN07654321.

One of the most important feature of the configuration file is to turn off CleverClient features that you do not want to use for your business. This particularly impacts the appearance of the Client tab.

```
# ===== Appearance of Clients Pane and associated
tabs=====
```

```
#
```

```
# Set these true or false to display tabs and related client fields
```

```
#
```

```
# if you want to use referrals
```

Use referrals=true

#

# if you want to use associates

Use associates=true

#

# if you want to use organisations

Use organisations=true

#

# Set these true or false to display client fields

#

# if you want to use client demographics (DOB, marital status, occupation)

Use client demographics=true

#

# if want to use the client resources used list

Use client resources=true

#

# if want to use the client check list

Use client check list=true

#

# set these values to use the optional client pane fields for your own purposes

# You change the labels on the fields. SET THEM to NOTHING to hide the field

#

# e.g. You are a mechanic and want to store the client's motor vehicle details

# Optional text 1 label=Vehicle make

# Optional text 2 label=Registration number



# Optional text 3 label=  
# Optional check box 1 label=  
# Optional check box 2 label=  
# Optional date 1 label=Date manufactured  
# Optional date 2 label=

#e.g. psychologist

Optional text 1 label=Case manager  
Optional text 2 label=K10 pre treatment  
Optional text 3 label=K10 post treatment  
Optional check box 1 label=Paperwork done  
Optional check box 2 label=  
Optional date 1 label=  
Optional date 2 label=

### **13.3 Titles List**

We have already looked briefly at changing the titles list. To do so select the Config->Edit titles menu item.



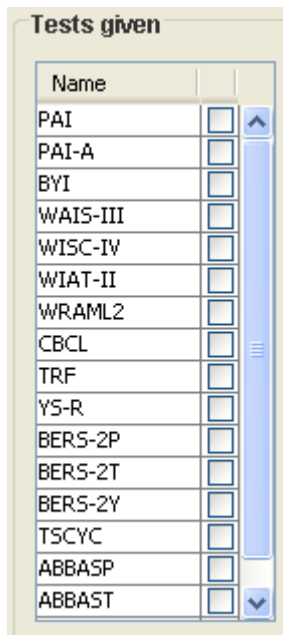
The title list is used when inputting names i.e. it loads the titles pulldowns / combo boxes. The default title is in the top of the list.

Title:  ▼

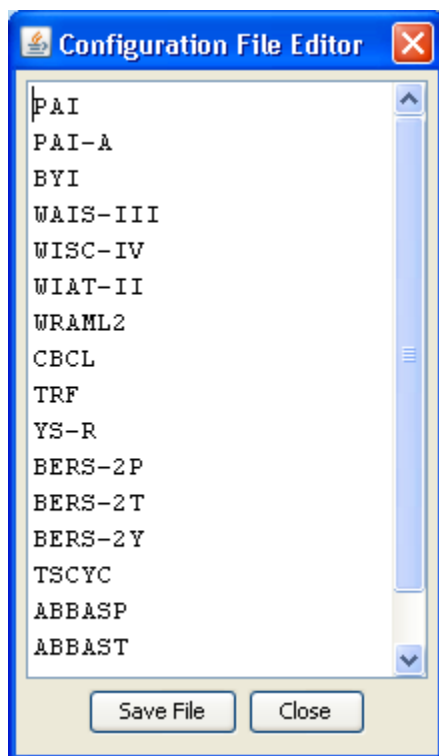
You usually add titles as required. For example, if Princess Diana walks through your door you would add "Princess" to the list. If most of your clients are Princesses you would put the entry at the top of the file.

## **13.4 Resources**

You can tick the resources that have been used for your client e.g. this could be used for psychology tests that you have given to a client.

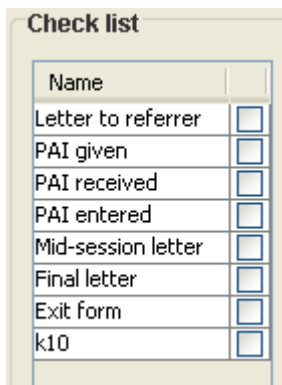


Use the Config->Edit tests list menu item to maintain the list of the resources that you use.



## 13.5 Check List

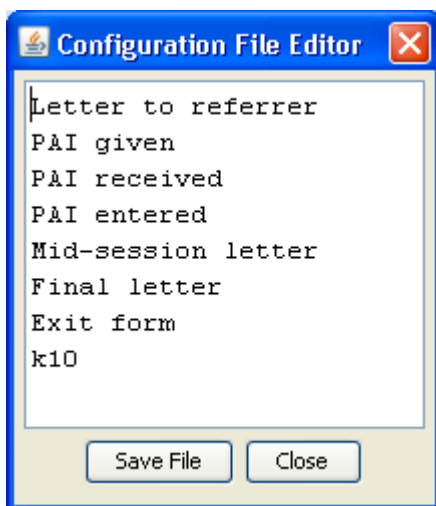
CleverClients enables you to set up a check list to remind yourself of the common steps you go through with client treatments.



A dialog box titled "Check list" with a table containing a list of tasks and checkboxes.

Name	
Letter to referrer	<input type="checkbox"/>
PAI given	<input type="checkbox"/>
PAI received	<input type="checkbox"/>
PAI entered	<input type="checkbox"/>
Mid-session letter	<input type="checkbox"/>
Final letter	<input type="checkbox"/>
Exit form	<input type="checkbox"/>
k10	<input type="checkbox"/>

Use the Config->Edit check list menu item to set up your own check list.



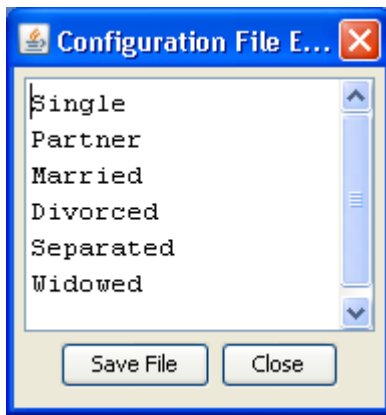
A dialog box titled "Configuration File Editor" with a text area containing a list of tasks and "Save File" and "Close" buttons.

Letter to referrer  
PAI given  
PAI received  
PAI entered  
Mid-session letter  
Final letter  
Exit form  
k10

Save File Close

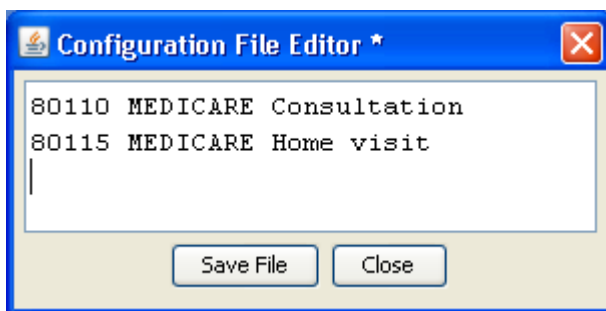
## 13.6 Marital Status

Use the Config-> Edit marital status list to change the marital status pulldown list.



### 13.7 Service Numbers

Use the Config->Edit service number list menu item to maintain the pulldown from which you can select service numbers.



Use the Config->Edit services list menu item to maintain the pulldown from which you can select the types of services that you offer (reports, courses etc).

You can also set the fee for all service numbers in the main configuration file. The service number list has the service code as the first word e.g.

80005 MEDICARE Clinical Psych - out of rooms - (30-50 min)

80100 MEDICARE FPS Service - in rooms - (20-50 min)

80105 MEDICARE FPS Service - out of rooms - (20-50 min)

You can set the fees in the main configuration with entries like:

# Service code fee lookups

80010=119.80

80015=140.15

80000=81.60

80005=102.00

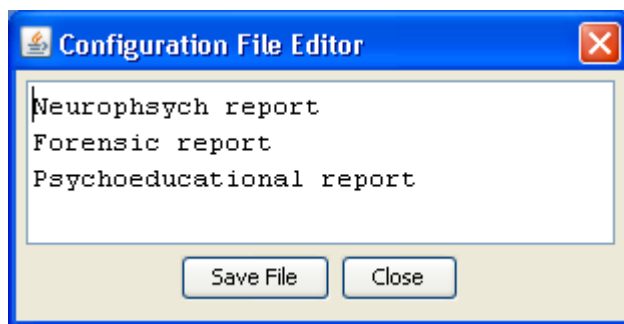
80100=57.80

80105=78.65

80110=81.60

80115=102.50

N0124=250.00

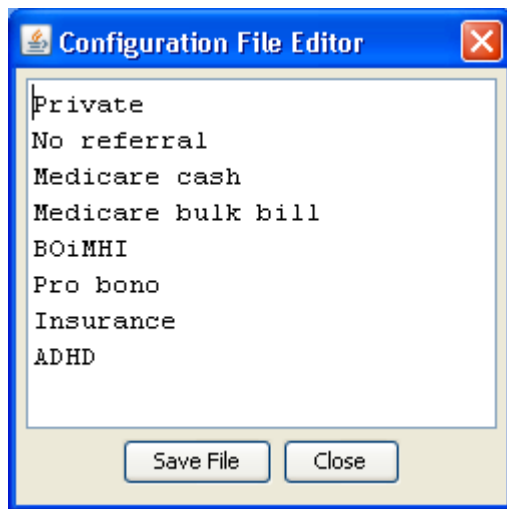


### 13.8 Client types

You can define your types of clients. You will probably use some of the supplied types and add some of your own. Generally if you have several clients of a particular type and in particular if you have a special charge for that type of client, you should set up a client type in the list.

For example, if your office is close to a university and a lot of your clients are students, and perhaps you offer a discount for them, then you should set up a "Student" type.

The first step is to select “Edit client type list” from the Config menu and add Student to it.



The second step is to select “Edit configuration” from the Config menu and set up some entries for the new Student type. You will find it easiest to “clone” entries for existing types. A student type is similar to the Private type, which has entries like:

Private\_FEE=110

Private\_TAX=0

Private\_SESSIONS=0

Private\_CLAIM=0

Private\_CHECK=

So you set up entries like the following, where your fee is say \$60.

Student\_FEE=60

Student\_TAX=0

Student\_SESSIONS=0

Student\_CLAIM=0

Student\_CHECK=

It is probably obvious that the name has to be exactly the same (here Student) in both configuration files.

The entries mean the following:

- Student\_FEE=60 – what you charge
- Student\_TAX=0 – tax to be paid. You can decide whether it is added to the charge or included, but be consistent.
- Student\_SESSIONS=0 – the number of sessions for the referral. Used for government schemes or Insurance allocations, but not relevant here.
- Student\_CLAIM=0 – the system will remind you to claim after this number of days (irrelevant)
- Student\_CHECK= - gives a list of client and appointment compulsory fields. None here. Described below.

For a more involved example, here are the entries for the BOMiHI scheme:

- BOiMHI\_FEE=110
- BOiMHI\_TAX=0
- BOiMHI\_SESSIONS=12 – each referral is for 12 sessions
- BOiMHI\_CLAIM=30 – We usually claim every two weeks, but will be reminded after a month.
- BOiMHI\_CHECK=RefNo,Referrer,DOB,K10,ExtDB – A reference number is required, the referring doctor must be specified, date of birth is required, the doctor must supply a K10 test result and data has to be entered into the BOMiHI web site. When you create a new BOMiHI client you will have several yellow fields until you supply the data.

The checking flags are given as a comma separated list, and are:



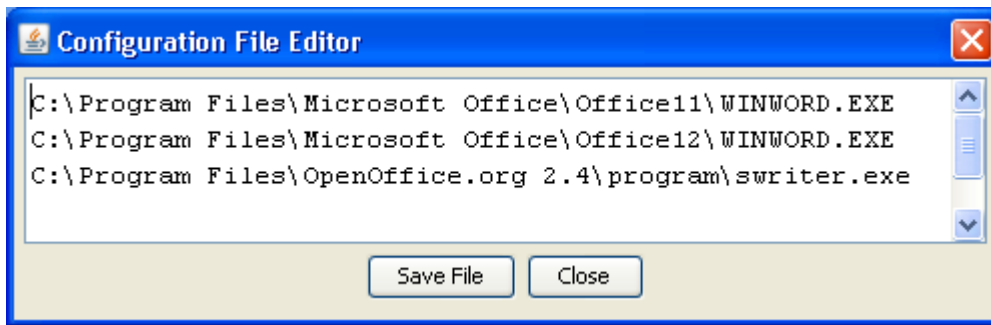
- DOB – you should supply the date of birth
- ExtDB – you should enter data into another organisations database on their web site
- Group – the types has group appointments so the flag will be set by default
- K10 – the doctor should supply the results of a K10 test
- Referrer – you need to supply a doctor or Insurance company contact.
- RefNo – a reference number is expected.
- Service – you should enter a service number.

You should edit the client list and remove or rename the types. Then you should edit the main configuration and set the fees you charge and create any new types. We suggest that you leave entries for types that you don't use as you may want them as models later.

### **13.9 Configuring Word Processors and Spreadsheets**

Your word processor and spreadsheet are started by CleverClients by using the configuration files WordProcessor.txt and SpreadSheet.txt respectively. If you can display letters then you will not have to do any configuration.

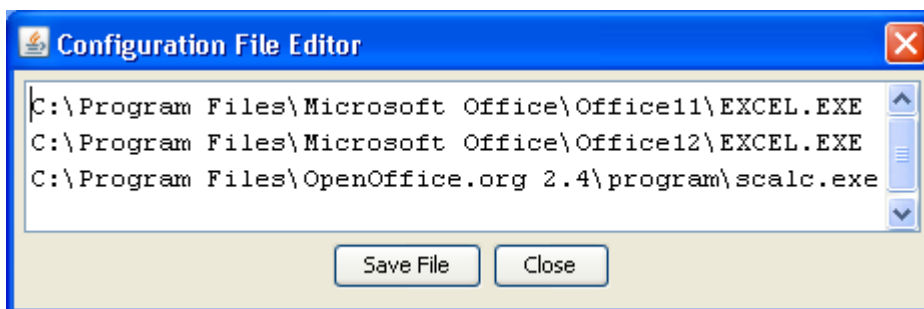
These files need to contain the names of the executable files. For example if you run the file C:\Program Files\Microsoft Office\Office11\winword.exe on our system, Word will appear. The actual file name depends on the version of office (or other software) that you have.



The supplied configuration as supplied will execute some versions of word that we know about. It will not work if:

- You have some other version of word.
- You installed into a non-standard place.
- You are using other software.

If Word does not start up you need to find out where it is installed. Use the Start->Search facility and look for the file name WINWORD.EXE. Then select the "Config->Edit word processor run" menu item and set up a file. All you need is a single line similar to that displayed. Note the quotes, which are required because of the blanks in the file names.



Similarly, if your spreadsheet does not appear you need to search for the file EXCEL.EXE and edit the configuration file using the "Config->Edit Spreadsheet run" menu item.

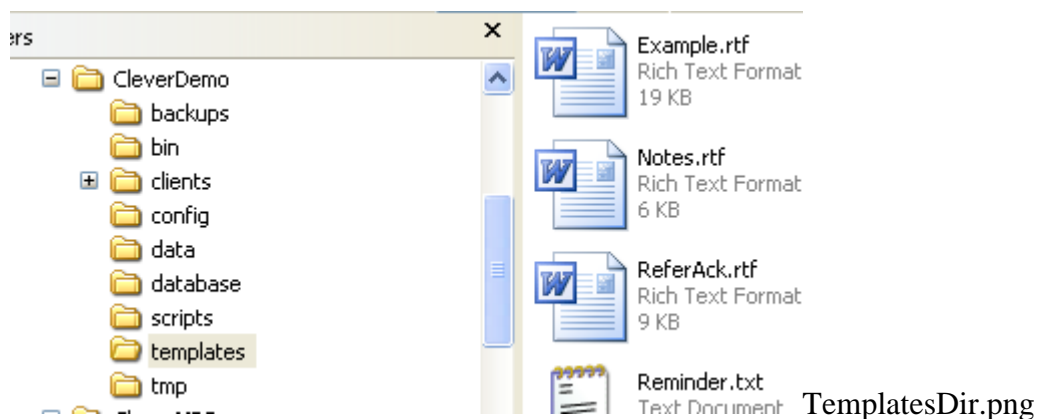
If you are using OpenOffice you need to search for swriter.exe and scalc.exe and edit the files as above. You will need files that look something like:

"C:\Program Files\OpenOffice.org 2.4\program\swriter.exe" for the word processor,  
and

"C:\Program Files\OpenOffice.org 2.4\program\scalc.exe" for the spreadsheet.

## 14.0 LETTERS

Letters are defined as Rich Text Format (RTF) files in the Templates directory.



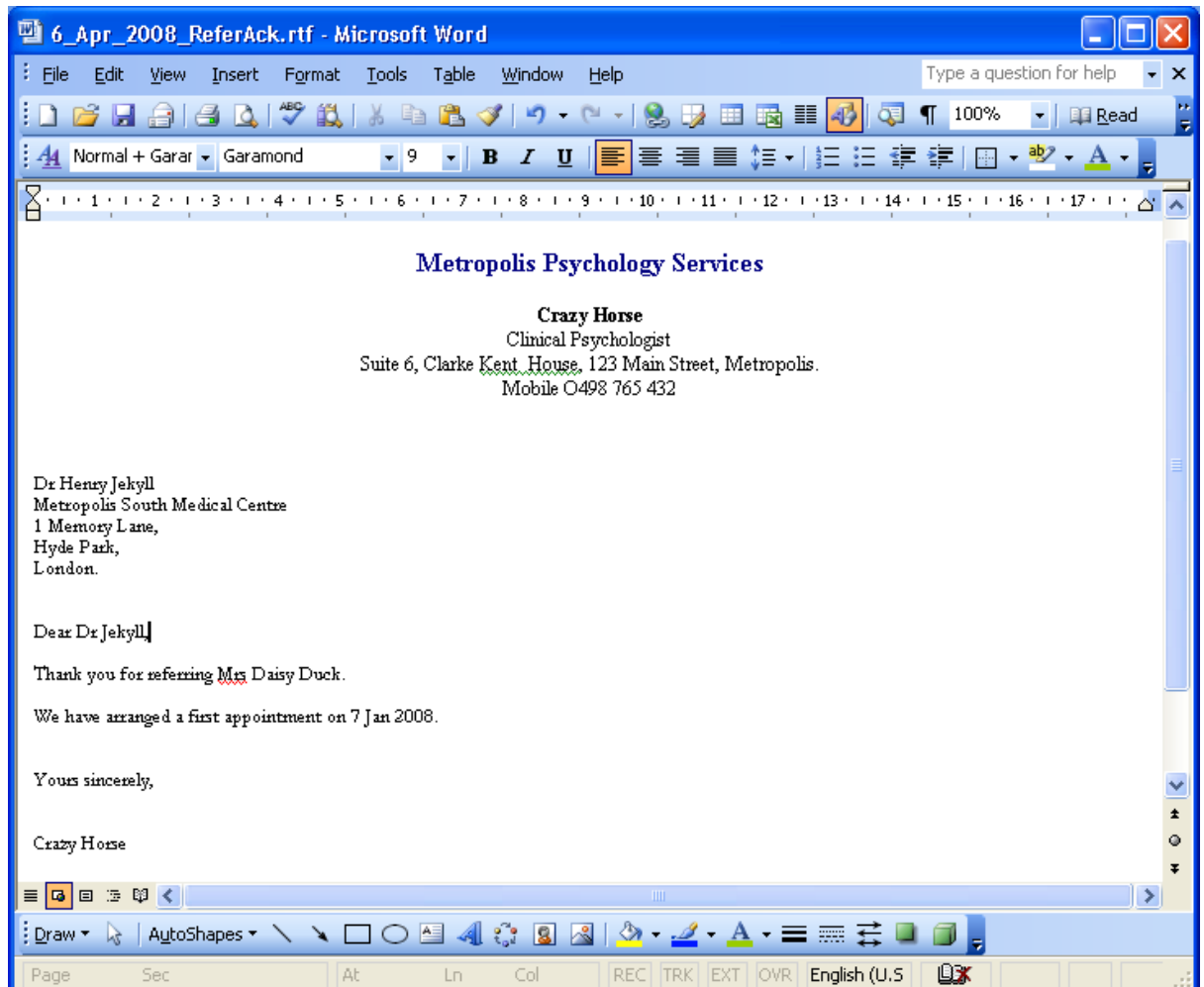
Letter templates are set up with known strings that are replaced with actual values from the current client and appointment.

This does not work with the Word binary formats such as doc. We use the RTF format which is a plain txt file (you can read it in WordPad) although you could use other formats.

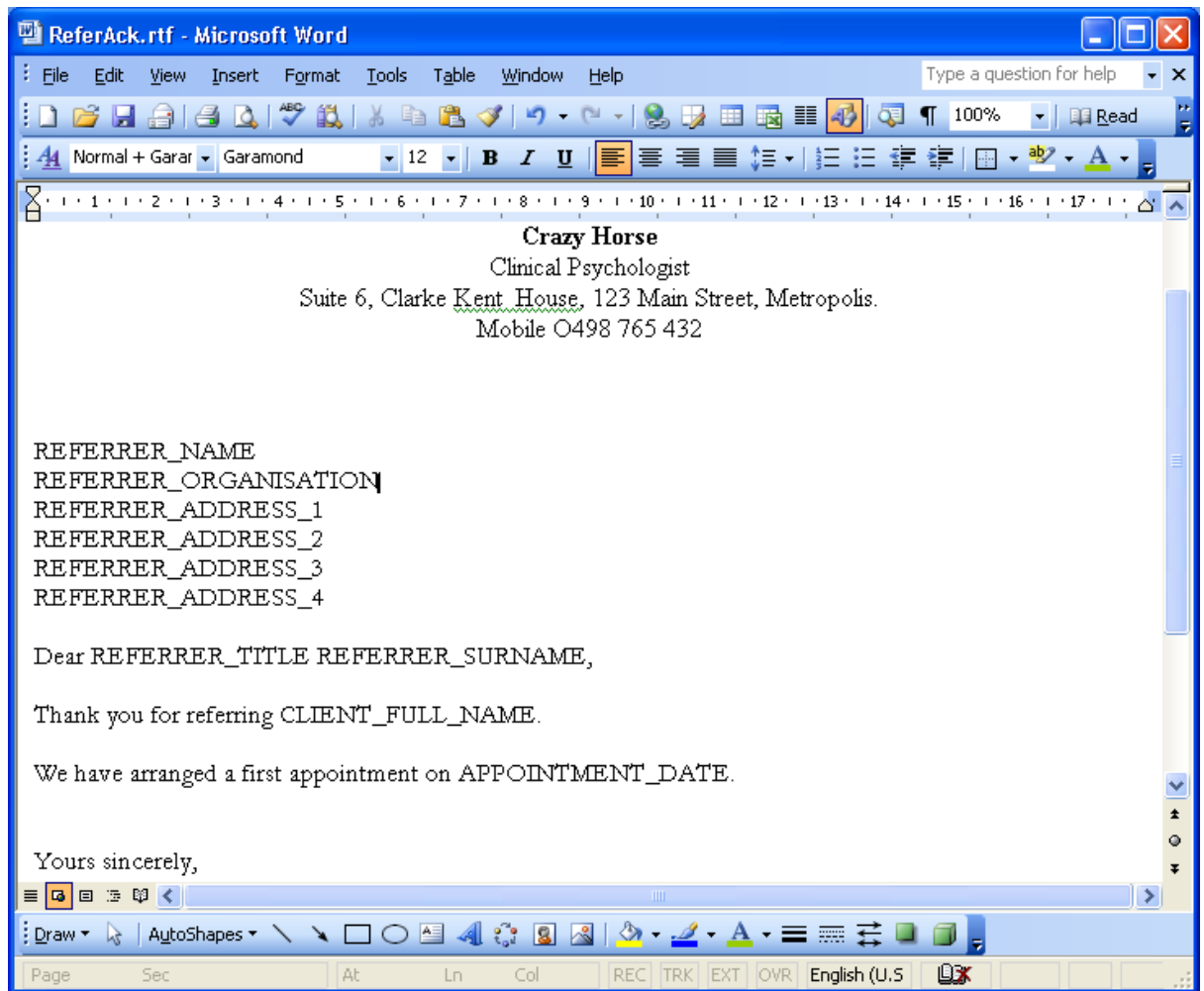
RTF files with embedded images (e.g. your logo) can be large.

### 14.1 Example

To repeat an earlier example; the following letter was generated by selecting Daisy Duck's first appointment and the selecting "Referrer acknowledgement" from the Office menu.



This was generated from the following template file:



As you can see, the template has some obvious values such as APPOINTMENT\_DATE and CLIENT\_FULL\_NAME.

Letters are automatically generated in the client's directory and you will often modify them and save then before sending them off.

## 14.2 Configuration

The main configuration file contains some information about the business

You should set up the values:

Business Name = The Funny Farm Ltd

Business Mail = crazy@gmail.xyz

Business Phone = 0598765432

Business Fax = 12344321

Business Address = 123 Main Street, Hicksville, New York.

Business contact Full Name = Dr Crazy Horse

Business reference number = ABN07654321

### **14.3      Supplied Letters**

You will likely want to use some of the supplied letters, so the first thing would be to load them into your word processor and insert your usual letter header and signature blocks. There is also a “one off” menu item. If you want to create a non-standard letter you can edit the OneOffLetter.rtf template and select the menu item to generate the letter.

### **14.4      Your Letters**

To generate your own letters start with one of the supplied templates, modify it and save it as a new RTF file in the templates directory.

We have had problems doing this with word. You may have to set up a basic RTF file with your header that works and copy and paste to it to set up all the files.

There is an example template which contains all the available strings (we use it for development and testing). You can display it as a letter in the usual way. Here is some of it.

Client variables:

```
Full name: CLIENT_FULL_NAME
All names: CLIENT_ALL_NAMES
Address: CLIENT_ADDRESS
Address1: CLIENT_ADDRESS_1
Address2: CLIENT_ADDRESS_2
Address3: CLIENT_ADDRESS_3
Address4: CLIENT_ADDRESS_4
After hours phone: CLIENT_AH_PHONE
Client ref no: CLIENT_REF_NUMBER
Type: CLIENT_TYPE
Day phone: CLIENT_DAY_PHONE
Date of birth: CLIENT_DOB
DOB in other format: SLASH_CLIENT_DOB
Email: CLIENT_EMAIL
Given names: CLIENT_GIVEN_NAMES
Memo: CLIENT_MEMO
Mobile: CLIENT_MOBILE
Occupation: CLIENT_OCCUPATION
Referred date: CLIENT_REFERRED_DATE
Surname: CLIENT_SURNAME
Title: CLIENT_TITLE
```

Appointment variables:

You can copy-and-paste from the Example.rtf file into your document. We recommend this as you need to have the spelling and case exactly right. Sometimes word doesn't handle this.

When you have defined your new letter you have to tell CleverClients about it and insert it into the Office menu. You do this by editing the main configuration file. For example, here are some lines from the file:

Word extension=.rtf

Invoice / receipt=templates\InvoiceReceipt.rtf, Anonymous

Client notes=templates\Notes.rtf, OneOnly

Referrer acknowledgement=templates\ReferAck.rtf, DateReqd

Mid referral=templates\MidReferral.rtf, DateReqd

End referral=templates\EndReferral.rtf, DateReqd

Example=templates\Example.rtf



The first line “Word extension=.rtf” tells the system that we are using RTF files. If, for example, you were using OpenOffice, you might decide to use another type of file.

The other lines define the Office menu items:

- The part before the = is the menu item.
- The next part is the file name (starting with templates)

There may be comma separated flags following:

- OneOnly means that there is only one file created for the letter for that client, and each time the file will be re-opened.
- DateReqd means that the file name will contain today's date so you know from the directory when you wrote it.
- Anonymous means that the output file is not stored for the user (its written into the tmp folder).

The OneOnly flag is used with the Notes letter type which is a place for you to store whatever you want to write about the client.

## **14.5 Rich Text Problems**

Sometimes you will find that whatever you do you cannot get a known text string to be replaced. This is because the actual RTF file does not have the complete text string.

You can fix the template by opening it in NotePad.

For example the following was in a template that would not display the client Email address:

```
\par \tab \hich\af2\dbch\af31505\loch\f2
```

Email: CLIENT\_EM\hich\af2\dbch\af31505\loch\f2 AIL

The template had to have the rubbish removed so the correct string is there i.e.

Email: CLIENT\_EMAIL

## 15.0 SMS AND MAIL

### 15.1 Introduction

CleverClients can send mail, and can send SMS messages by mailing them to a provider. So you need to configure both mail and SMS.

### 15.2 Configuring mail.

To enable mail you need to edit the configuration file so you have lines like the following:

- Mail [user=cleverclients@bigpond.com](mailto:user=cleverclients@bigpond.com) - you Email address i.e. your account
- Mail password=crazy – your account password
- Mail host=mail.bigpond.com – your mail provider's server
- Mail port=25

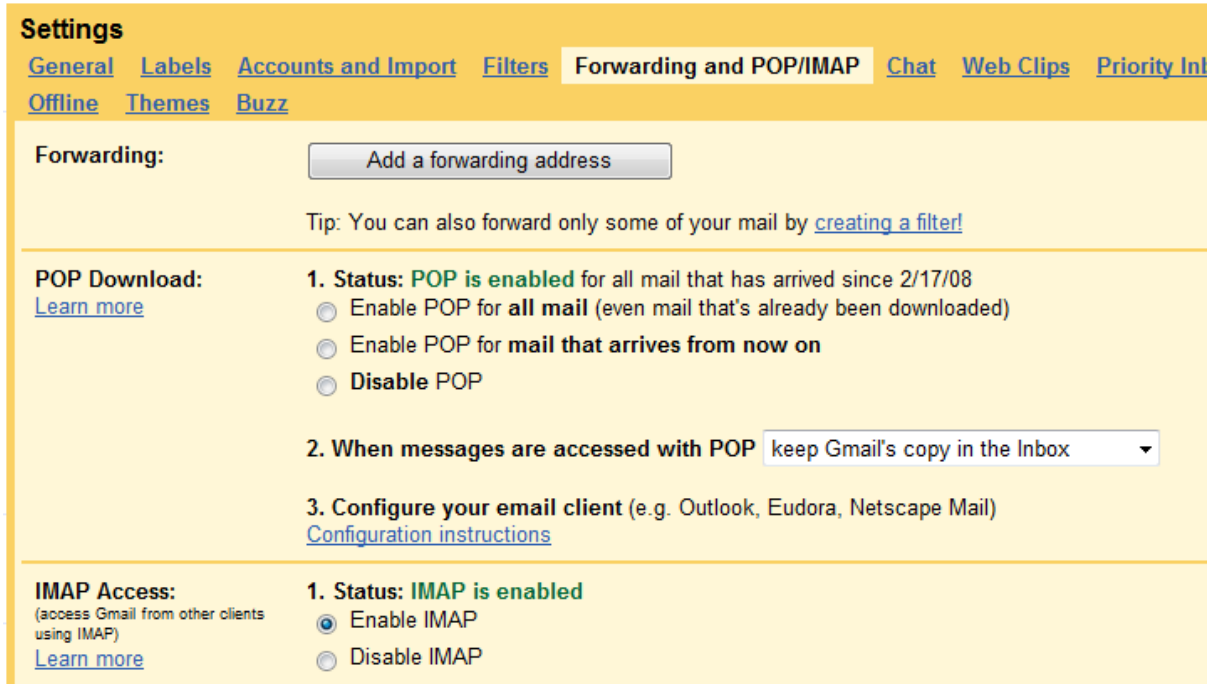
Most of the parameters are the same as you have put into outlook to define your Email account.

You can also use a **Gmail account** by using lines like:

- Mail user=cleverclients@gmail.com
- Mail password=HaHa%^&
- Mail host=smtp.gmail.com
- Mail port=465

You have to ensure the POP is enabled in your Gmail account

- Log into your Gmail account
- Go to the Gmail settings
- Choose Forwarding and POP / IMAP
- Chooses enable POP (if is not set already)



The screenshot shows the Gmail 'Settings' page with the 'Forwarding and POP/IMAP' tab selected. The 'Forwarding' section includes a button to 'Add a forwarding address' and a tip about creating a filter. The 'POP Download' section shows the status as 'POP is enabled' for all mail, with options to enable for all mail, enable for mail arriving from now on, or disable POP. It also shows the option to 'keep Gmail's copy in the Inbox' when messages are accessed with POP. The 'IMAP Access' section shows the status as 'IMAP is enabled' and options to enable or disable IMAP.

**Settings**

[General](#) [Labels](#) [Accounts and Import](#) [Filters](#) **Forwarding and POP/IMAP** [Chat](#) [Web Clips](#) [Priority In](#)

[Offline](#) [Themes](#) [Buzz](#)

**Forwarding:**

Tip: You can also forward only some of your mail by [creating a filter!](#)

**POP Download:** [Learn more](#)

**1. Status: POP is enabled** for all mail that has arrived since 2/17/08

☐ Enable POP for **all mail** (even mail that's already been downloaded)

☐ Enable POP for **mail that arrives from now on**

☐ Disable POP

**2. When messages are accessed with POP**

**3. Configure your email client** (e.g. Outlook, Eudora, Netscape Mail)  
[Configuration instructions](#)

**IMAP Access:** (access Gmail from other clients using IMAP) [Learn more](#)

**1. Status: IMAP is enabled**

☒ Enable IMAP

☐ Disable IMAP

Check that you have *configured mail correctly* by using a mail option from the Mail & SMS menu.

### 15.3 SMS Providers

You can send SMS messages from CleverClients.

Several companies can be found on the net and you can open an account with one of them.

To send an SMS message you send an Email to the provider. For example to SMS a client with mobile phone number 04123456 you simply Email the message to [04123456@provider.com](mailto:04123456@provider.com) where provider.com is the providers Email address.

Messages cost 5 to 25 cents.

You need a provider that works in the above way. Two are described below:

You open an account *using the Email address that you have configured*.

We have used Direct SMS ([www.directsms.com.au](http://www.directsms.com.au)). We have no relationship with them, but they have been helpful and it all works well. We set up an account with them and keep a positive credit with them. You can ask to be reminded when your credit gets low. We have set up the account so that if a client wants to reply it comes back to our mobile, but you can have it return via Email. They will give you a few free credits to try it out.

To enable this facility you need to edit the configuration file so you have lines like the following (there is no password):

- SMS host=directsms.com.au – the SMS provider Email
- SMS password=

The 5CentSMS provider ([www.5centsms.com.au](http://www.5centsms.com.au)) is very cheap.

After you have opened an account you can log into your account and go to the features page. Your password is given near the bottom of the page, and has to be sent as the subject of the Email along with your mobile number. The configuration file needs two lines like:

- SMS host=sms.5centsms.com.au
- SMS password=123456 0418765432

Check that you have *configured SMS correctly* by using an SMS option from the Mail & SMS menu.

## **15.4 Reminders**

Often clients do not show up for their appointments, so you can send them a reminder, usually the night before. For problem clients, you can send a second reminder an hour or so before the appointment.

Reminders are automatically send in the evening or in the morning. When they are sent is defined in the main configuration file, and can be disabled there if not required.

Use the “Mail & SMS -> Remind” menu items to manually send reminders.

The system will remind the client via SMS if they have a mobile phone number, and fall back to any entered Email address if they don’t.

You only need to have the occasional client turn up when they would have forgotten to pay for it.

The text of the message is defined in the templates\Reminder.txt file:

Your next appointment with Fred is on APPOINTMENT\_DAY  
APPOINTMENT\_DATE at APPOINTMENT\_TIME.

Please reply if you cannot attend or call Fred on 04 123 456.

It would be a good idea for you to edit this file before use.

We also have some clients who regularly respond to the reminder but still do not turn up. Sometimes this can be solved by making sure they have appointments later in the day. You can also set a flag against the client so they are sent an extra reminder just before the appointment. The number of hours before is a configuration item:

# Send extra emails to clients who often do not attend

# This is number of hours before their appointment

Extra reminder hours=1

You can also send an extra reminder from the SMS menu.

There is also a template file C:\CleverClientsData\templates\ReminderExtra.txt that you should edit.

### 15.5 Missed appointments

You can send a message to a client who did not turn up by selecting the missed appointment and using the “Mail & SMS -> Missed appointment” menu item.

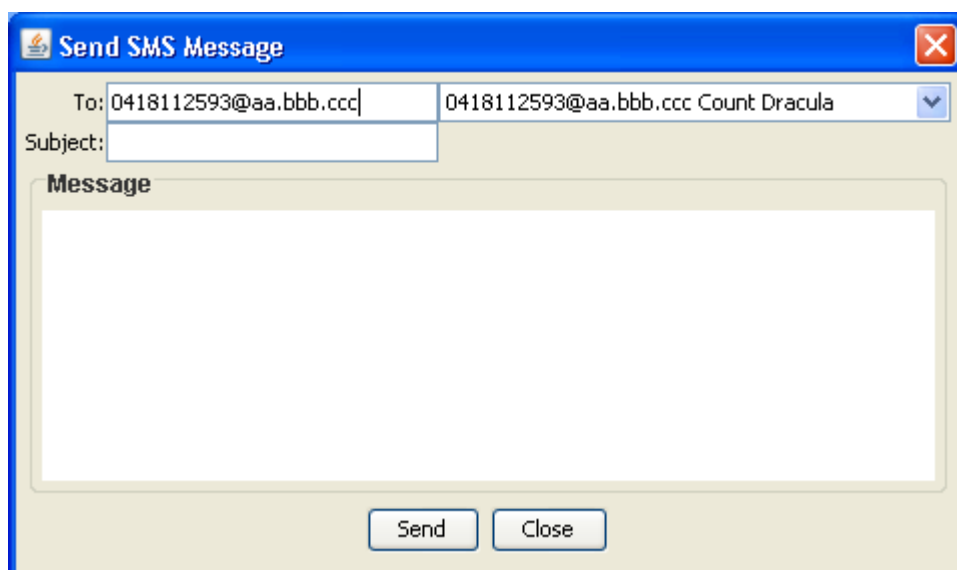
The text of the message is in the MissedAppointment.txt template file.

### 15.6 Sending SMS

You can send a message to a selected client or to all clients (after filtering).

For us older people who have trouble using their thumb to input messages there is also a menu option that enables you to type in a message (max 160 characters) and send it.

This pops up a dialog for you to use:

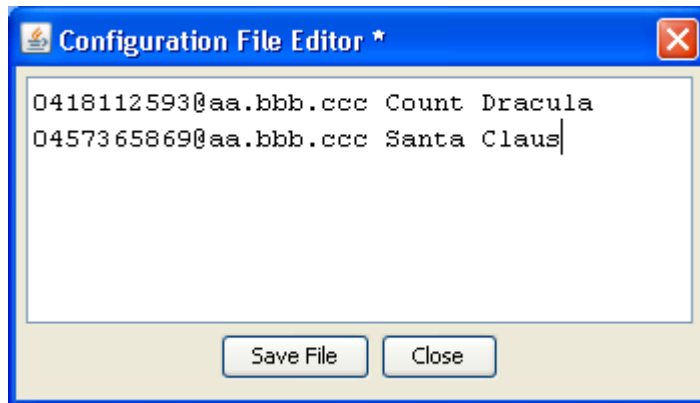


The screenshot shows a Windows-style dialog box titled "Send SMS Message". It has a blue title bar with a close button (X) in the top right corner. The dialog contains the following elements:

- A "To:" label followed by a text input field containing "0418112593@aa.bbb.ccc". To the right of this field is a dropdown menu showing "0418112593@aa.bbb.ccc Count Dracula".
- A "Subject:" label followed by an empty text input field.
- A large text area labeled "Message" for composing the SMS content.
- At the bottom, there are two buttons: "Send" and "Close".

SMSdialog.png

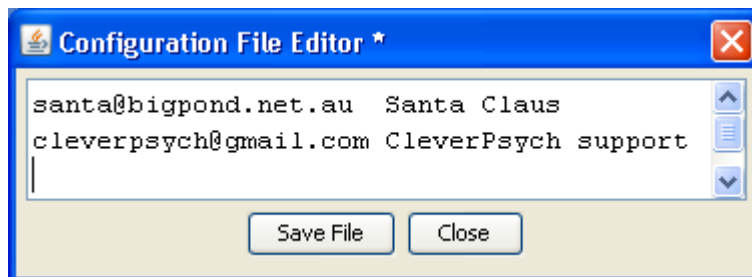
You can also set up a list of recipients to appear in the dialog by using the “Config->Edit SMS list” menu item. Follow the format below.



ConfigSMS.png

## 15.7 Sending Mail

You can send mail by using similar menu items to those above for SMS.



ConfigMail.png

## 15.8 Work Lists

You can have a list of client appointments and services sent to the defined staff in each diary the night before or in the morning (so you know if you have to get out of bed).



The list can be sent automatically by mail and / or SMS. You can also send it from the Mail & SMS menu.

Automatic sending (if you are connected permanently to the internet) is defined in the main configuration file:

```
# Sending list of today's appointments and services
# nothing is sent if there are no appointments or services
# hour is the morning if in range 6 to 10
# or the evening before if 1700 to 2200
Appointments list time=0
# will send to this Email if given
Appointments mail=crazy@gmail.xxx
# will send SMS (short list) if mobile is given
Appointments mobile=041234567
```

## **15.9 Mail Problems**

If mail is not being sent check the black background screen for errors. The likely problem is that you are not connecting to the mail server. Obvious errors are in the configuration where you do not have the correct mail server, Email address or password.

Failure to connect can also be caused by a Firewall or Anti-virus setting. For example, if you use Norton Internet Security you may have to go into Network settings -> Configure and turn off “Scan outgoing Email messages”.

## **16.0      DISASTERS**

### **16.1      Command Window**

As previously described, the command window will print out error messages if there are problems with your system. Hopefully they may make sense to you. You can mail the contents to us, and we will interpret them for you.

### **16.2      New Computers**

If you have bought a new computer you should download the latest version of Java (from Oracle).

Make sure that the time zone is set correctly (click on the time).

New Word Processor

If you have bought a new version of Microsoft Office (or other) and selecting an item from the Office menu does not display a letter you need to update your CleverClientsData\config\WordProcessor.txt file to give the executable file. Look first at the latest CleverDemo\config\WordProcessor.txt file.

### **16.3      Memory**

If you are handling a larger number of clients you may exceed the maximum allocated memory. There will be a message in the command window of the form:

```
java.lang.OutOfMemoryError: Java heap space
```

The memory can be increased with the Xmx parameter on the run command in the C:\Program Files (x86)\CleverClients\RunCleverClients.cmd There is a maximum value that you can set, usually about 1500m.

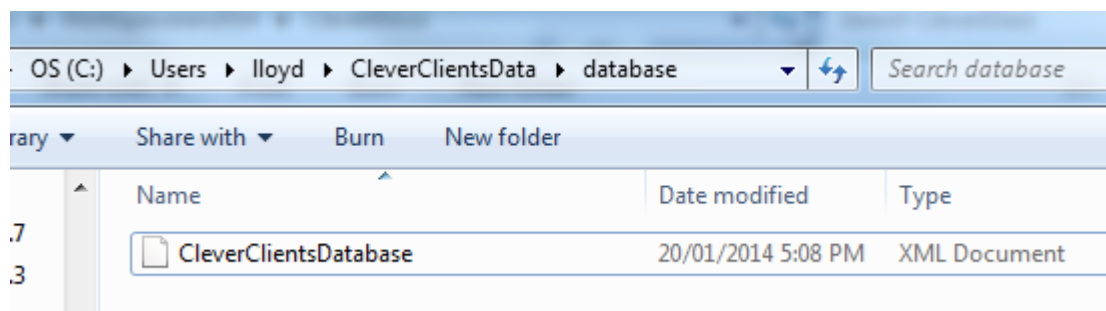
## 16.4 Database Recovery

It is possible that some windows problem could result in a corrupted database with the resulting loss of client data. We have seen this happen when a fan failed in summer and the computer overheated, and when the windows system strangely “hung”.

This should not be too serious as you have been regularly backing up your system, haven’t you?

To restore a database you need to replace the existing Database.xml file in the database directory with a backup copy, restart CleverClients, and then manually re-enter recent appointments from your paper diary. There are usually many backup copies on the database in the CleverClientsData\backup folder – use the one with yesterdays date.

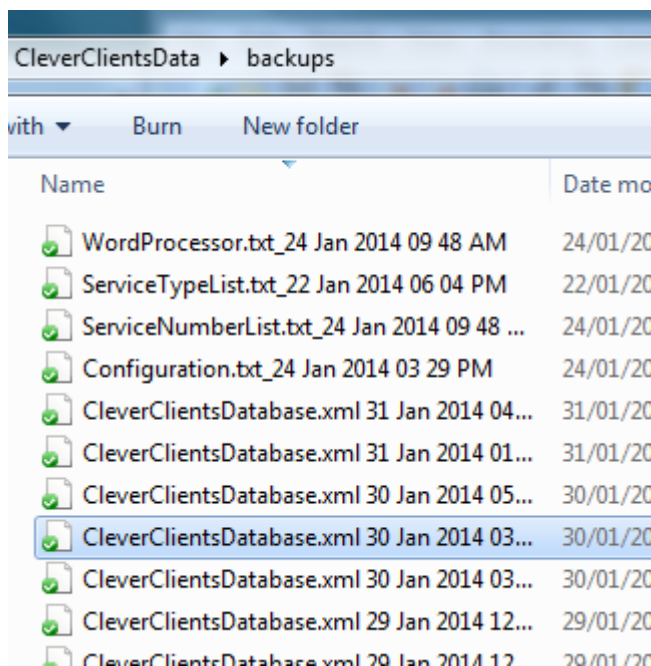
The database file CleverClientsDatabase.xml will probably appear in windows explorer as a file called Database of type XML.



DatabaseFile.png

If you think that there is a problem with your disk, don't delete the old database file but rename it which may stop the bad part of the disk being reused, and talk to your computer service person.

Every time you start CleverClients a backup of your database is stored in the backups directory (and typically kept for a month). You can usually find a backup that is more recent than the one you made yourself.



DatabaseBackups.png

In summary:

- Click on the latest database backup and copy it.
- Go to the database folder and paste
- Rename the existing database file e.g. to BADCleverClientsDatabase.xml
- Rename the backup file to CleverClientsDatabase.xml

A trap is that the latest backup may have been made of a **corrupted** database so is also corrupted – you will have to use an older backup.

## **16.5      Java Problems**

We have seen a case where some Java files were strangely deleted. If you see messages that seem to relate to Java or “classes” you may need to re-install Java.

See [www.java.com](http://www.java.com)

## APPENDIX A

### DATE FORMATS

Date formats are those for the Java SimpleDateFormat class. This is an extract from the Java documentation.

For more information search the net.

#### 16.5.1.1 DATE AND TIME PATTERNS

Date and time formats are specified by *date and time pattern* strings. Within date and time pattern strings, unquoted letters from 'A' to 'Z' and from 'a' to 'z' are interpreted as pattern letters representing the components of a date or time string. Text can be quoted using single quotes (') to avoid interpretation. "'" represents a single quote. All other characters are not interpreted; they're simply copied into the output string during formatting or matched against the input string during parsing.

The following pattern letters are defined (all other characters from 'A' to 'Z' and from 'a' to 'z' are reserved):

Letter	Date or Time Component	Presentation	Examples
	Era designator	<a href="#">Text</a>	AD
	Year	<a href="#">Year</a>	1996; 96

Month in year

[Month](#)

July; Jul; 07

Week in year

[Number](#)

27

Week in month

[Number](#)

2

Day in year

[Number](#)

189

Day in month

[Number](#)

10

Day of week in  
month

[Number](#)

2

Day in week

[Text](#)

Tuesday; Tue

Am/pm marker

[Text](#)

PM

Hour in day (0-  
23)

[Number](#)

0

Hour in day (1-  
24)

[Number](#)

24

Hour in am/pm  
(0-11)

[Number](#)

0

Hour in am/pm  
(1-12)

[Number](#)

12

Minute in hour

[Number](#)

30

	Second in minute	<a href="#">Number</a>	55
	Millisecond	<a href="#">Number</a>	978
	Time zone	<a href="#">General</a> <a href="#">time zone</a>	Pacific Standard Time; PST; GMT-08:00
	Time zone	<a href="#">RFC 822</a> <a href="#">time zone</a>	-0800

Pattern letters are usually repeated, as their number determines the exact presentation:

- **Text:** For formatting, if the number of pattern letters is 4 or more, the full form is used; otherwise a short or abbreviated form is used if available. For parsing, both forms are accepted, independent of the number of pattern letters.
- **Number:** For formatting, the number of pattern letters is the minimum number of digits, and shorter numbers are zero-padded to this amount. For parsing, the number of pattern letters is ignored unless it's needed to separate two adjacent fields.
- **Year:** If the formatter's [Calendar](#) is the Gregorian calendar, the following rules are applied.
  - For formatting, if the number of pattern letters is 2, the year is truncated to 2 digits; otherwise it is interpreted as a [number](#).
  - For parsing, if the number of pattern letters is more than 2, the year is interpreted literally, regardless of the number of digits. So using the pattern "MM/dd/yyyy", "01/11/12" parses to Jan 11, 12 A.D.
  - For parsing with the abbreviated year pattern ("y" or "yy"), `SimpleDateFormat` must interpret the abbreviated year relative to some century. It does this by adjusting dates to be within 80 years before and 20 years after the time the `SimpleDateFormat` instance is created. For example, using a pattern of "MM/dd/yy" and a `SimpleDateFormat` instance created on Jan 1, 1997, the string "01/11/12" would be interpreted as Jan 11, 2012 while the string "05/04/64" would be interpreted as May 4, 1964. During parsing, only strings consisting of exactly two digits, as defined by [Character.isDigit\(char\)](#), will be parsed into the default century. Any other numeric string, such as a one digit string, a three or more digit string, or a two digit string that isn't all digits (for example, "-1"), is interpreted literally. So "01/02/3" or "01/02/003" are parsed, using the same pattern, as Jan 2, 3 AD. Likewise, "01/02/-3" is parsed as Jan 2, 4 BC.



Otherwise, calendar system specific forms are applied. For both formatting and parsing, if the number of pattern letters is 4 or more, a calendar specific [long form](#) is used. Otherwise, a calendar specific [short or abbreviated form](#) is used.

- **Month:** If the number of pattern letters is 3 or more, the month is interpreted as [text](#); otherwise, it is interpreted as a [number](#).
- **General time zone:** Time zones are interpreted as [text](#) if they have names. For time zones representing a GMT offset value, the following syntax is used:

- *GMTOffsetTimeZone:*
- *GMT Sign Hours : Minutes*
- *Sign:* one of
- *+ -*
- *Hours:*
- *Digit*
- *Digit Digit*
- *Minutes:*
- *Digit Digit*
- *Digit:* one of
- *0 1 2 3 4 5 6 7 8 9*

*Hours* must be between 0 and 23, and *Minutes* must be between 00 and 59.

The format is locale independent and digits must be taken from the Basic Latin block of the Unicode standard.

For parsing, [RFC 822 time zones](#) are also accepted.

- **RFC 822 time zone:** For formatting, the RFC 822 4-digit time zone format is used:
- *RFC822TimeZone:*
- *Sign TwoDigitHours Minutes*
- *TwoDigitHours:*
- *Digit Digit*

*TwoDigitHours* must be between 00 and 23. Other definitions are as for [general time zones](#).

For parsing, [general time zones](#) are also accepted.

`SimpleDateFormat` also supports *localized date and time pattern* strings. In these strings, the pattern letters described above may be replaced with other, locale dependent,

pattern letters. `SimpleDateFormat` does not deal with the localization of text other than the pattern letters; that's up to the client of the class.

### 16.5.1.2 EXAMPLES

The following examples show how date and time patterns are interpreted in the U.S. locale. The given date and time are 2001-07-04 12:08:56 local time in the U.S. Pacific Time zone.

Date and Time Pattern	Result
"yyyy.MM.dd G 'at' HH:mm:ss z"	2001.07.04 AD at 12:08:56 PDT
"EEE, MMM d, ''yy" "h:mm a"	Wed, Jul 4, '01 12:08 PM
"hh 'o''clock' a, zzzz" "K:mm a, z"	12 o'clock PM, Pacific Daylight Time 0:08 PM, PDT
"yyyyy.MMMMM.dd GGG hh:mm aaa"	02001.July.04 AD 12:08 PM
"EEE, d MMM yyyy HH:mm:ss Z"	Wed, 4 Jul 2001 12:08:56 -0700
"yyMMddHHmmssZ" "yyyy-MM- dd'T'HH:mm:ss.SSSZ"	010704120856-0700 2001-07-04T12:08:56.235-0700