

DEMO Step-by-step guide to using Contacts!

1. CONTACTS is sold a multi-user contact management system.
2. This DEMO is a single user version, Limited to 5 contact and 5 address records only. You may use either the OSX or Mac Classic version.
3. It has been created using FileMaker Pro 5.5. It will also run on FileMaker Pro 6
4. The Email function works with Outlook, Outlook Express 5, and Entourage
5. Please read all the installation and set-up instructions on this page before using this demo.

Installation

- To open this demo version, first drag the CONTACTS FOLDER onto your hard drive
- Open the folder and double click on "CONTACTS DEMO"
- Enter the password DEMO when prompted.

The file launching facility from the links page is disabled in this demo version, but simply works by enabling you to attach any file of any type to any contact record in the database when using the full version, You can then open that file directly from the database.

To set up the staff file – which is essential to make the diary work, go to the main menu, select 'SET UP', then select the STAFF FILE button. You can fill in all your details as required on this screen. Ensure that at least a full name and a set of Initials are entered for each staff member.

Then do the following:

1. Go to the EDIT MENU
2. Choose – PREFERENCES – APPLICATION
3. On the GENERAL tab, change the USER NAME to CUSTOM and type your name EXACTLY as it appears in the staff file. Then exit the Preferences screen.

NEXT – Go back to the menu – click on the CONTACTS button from the main menu and then follow the steps below which will walk you through how to use CONTACTS.

Remember – Contacts is totally cross- platform and is available for OSX , Classic/OS9, and all windows platforms from 95 onwards.

Additional programming if required

Although Contacts! is sold as complete, it can be tailored to suit the requirements of any company. This work can either be undertaken by Cruise Control or by the clients themselves.

What can Contacts! do?

Following is a list of tasks most users will need to perform when using Contacts!

1. Add a new contact
2. Add a new company
3. Delete a company
4. Delete a contact
5. Amend company or contact details
6. Create an Action list (To-Do list)
7. Send a letter
8. Create a Fax
9. Send an Email
10. Log a Phone Call
11. Make a File Note
12. Create a Mail Merge
13. Print Labels
14. Print DL envelopes
15. Amend/add categories
16. Edit Contact origination list and Status List (Contact file)
17. Find a previous correspondence
18. Find all staff within a company
19. Set up a standard letter
20. Fill in the Set-up screen
21. Find various 'lists' of contacts and print them
22. Turn off Mail To button
23. Schedule/Diary Manager
24. Advanced Searches

1. Add a new contact

- Go to main menu
- Click the Contacts button
- Click the mauve "Add Contact" button on the top left of the screen
- Fill in the First Name, Surname, Postcode and Company name
- Press Continue
- This will automatically check to see if the contact already exists, or if the company already exists. It will show you a short list of any names or company names that match your criteria.
- The on-screen messages help you through this process
- If the company does not exist in the system, you will end up on a pink screen (this is the companies file), you should see your new contact in the list on the bottom half of this screen.
- When you have entered the rest of the company information you can click on the pink area just to the left of your new contact name (within the black line) and this will take you through to the contact file where you can fill in the rest of the details about your contact.
- To go back to the Companies file, click the button on the left of the Company field on the contact screen and this will go to the associated company address.

2. Add a new company

- Go to the Menu file
- Click on the Companies button
- Select New Record
- Enter the company name and postcode
- Press continue
- This will automatically search the database to see if the company already exists.
- Follow the on-screen instructions

3. Delete a company

- If you delete a company all the associated contacts will be deleted with it, and all of their correspondence.
- If you do not wish this to occur, it may be better to simply denote the status of the company as 'inactive'.
- To delete a company, go to the main menu, click on Companies,
- Click "Find" to find the company you wish to delete
- When you are sure you have the correct record click on the Delete Record button on the top left of the companies screen. THERE IS NO UNDO FUNCTION FOR THIS PROCESS!

4. Delete a Contact

- If you delete a contact the associated correspondence in the activity log will be deleted too.
- If you do not wish this to occur, it may be better to simply denote the status of the contact as 'inactive'.
- To delete a contact, go to the main menu, click on Contacts,
- Click "Find" to find the contact you wish to delete
- When you are sure you have the correct record click on the Delete Record button on the top left of the contacts screen. THERE IS NO UNDO FUNCTION FOR THIS PROCESS!

5. Amend company or Contact details

- If a company name changes, or address etc, simply over-type details on the Company screen and all associated contacts will automatically have their address details updated.
- If a Contacts details change (i.e. maiden name changes to married name and Ms to Mrs), overtype the existing information on the contact screen for the correct contact.
- All previous Activities (correspondence) will keep the details as entered at the time of creating the activity, so your historic records will be accurate, all new activities will have the new address and name details.

6. Create an Action list (To-Do list)

- Press this button from either the main menu, or from either one of the ACTIVITY screens in the CONTACTS file.
- Put in your search criteria.
- A list will be generated.
- You can either print an overview list, or print a detailed list. The detailed list shows a much large amount of the actual letter/ email/fax content etc..

7. Send a letter

- Go to main menu
- Select Contacts
- Click Find (Mauve button on top menu bar)
- Find the contact to whom you wish to write
- Click on the Activity tab
- Click on New Activity
- Choose Freeform Letter as the correspondence type
- Choose your name from the pull-down list
- Choose your position
- The company name should automatically enter from the set-up file
- Check the Salutation Protocol
- If it is incorrect, type the correct format into the 'Other' field and select 'other' in the salutation protocol field
- Press Continue
- If you change your mind about creating the letter, just press Cancel and the letter will be deleted and you will be returned to the Contacts screen

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- You will then be presented with the Freeform Letter screen
 - You can either choose a standard letter from the list on the top right of the letter (by clicking on the Letter Ref No field), and then press 'paste letter' to insert it into the body of the correspondence.
 - Or you can simply type your letter into the Content of Activity.
 - When you have finished you can spell check your letter by pressing the 'Check Spelling' button on the right of the screen.
 - To Print your letter, press the Print Letter button, at the top of the screen check the page set-up for your printer and then choose how many copies you wish to print.
 - Once your letter has printed you can click 'Contacts' to go back to the contacts file, or amend your letter and re-print if desired.

8. Create a Fax

- Follow the instructions on 7. Send a letter (but select Freeform Fax as the correspondence type)_until you reach the dotted line shown below

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- You will then be presented with the Freeform Fax screen
 - You can either choose a standard letter from the list on the top right of the fax (by clicking on the Letter Ref No field), and then press 'paste letter' to insert it into the body of the correspondence.
 - Or you can simply type your fax into the Content of Activity.
 - When you have finished you can spell check your letter by pressing the 'Check Spelling' button on the right of the screen.
 - To Print your fax, press the Print Fax button, check the page set-up for your printer and then choose how many copies you wish to print.
 - Once your fax has printed you can click 'Contacts' to go back to the contacts file, or amend your fax and re-print if desired.

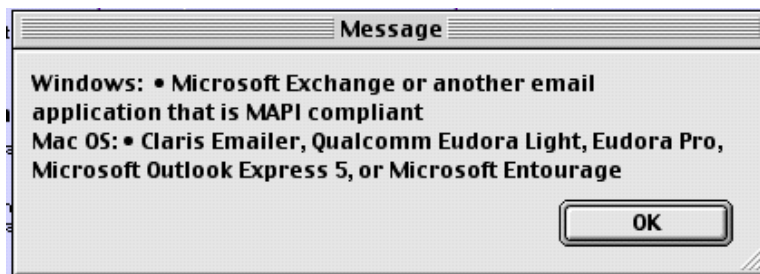
9. **Send an Email**

- Follow the instructions on 7. Send a letter (but select Email as the correspondence type) until you reach the dotted line shown below

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- You will then be presented with the Email screen
 - You can over-type the email address if you wish – this will not update the one already stored on the main Contacts file
 - Fill in the Subject and the Content of Email
 - You can send a mail merged email, which sends one email to many recipients as individual emails by using the mail merge facility, and selecting Emails rather than letters as the mail merge format.
 - There are two ways to send an email as follows:

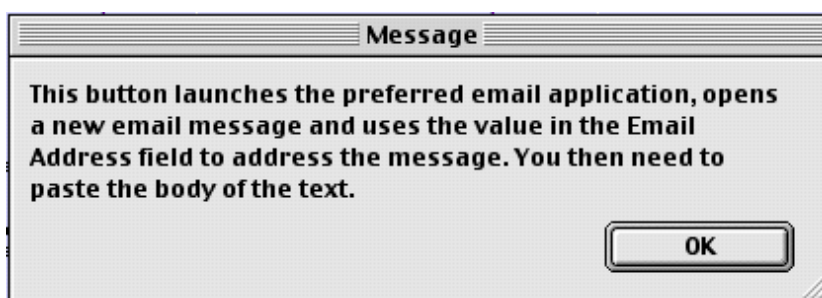
Send Auto Email

- The following describes when you should use the Auto email facility. You may pre-enter your CC's in the CC Field prior to clicking the Send Auto Email button using this method by putting a semi-colon between each email address



Send Manual Email

- The following describes when you should use Manual email facility. When using the Send Manual Email button, the CC facility is not available. CC's will need to be added in the email software. You will also need to PASTE the body copy into the body of the email when it opens (it will have automatically been copied for you)



10. **Log a Phone Call**

- Follow the instructions on 7. Send a letter (but select Phone call as the correspondence type) until you reach the dotted line shown below
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- You will then be presented with the Phone Call screen

- You can type in any notes about your phone conversation.
- Click on Contacts to get back to the Contacts file

11. Make a File Note

- Follow the instructions on 7. Create a letter (but select File Note as the correspondence type) until you reach the dotted line shown below

- You will then be presented with the File Note screen
- Type your file note into the content of activity box
- Click on Contacts to go back to the contacts file.

12. Create a Mail Merge

- You can easily create one letter that is sent to many recipients by using the mail merge facility. This can also be used to send an email to many recipients
- These letters will be stored in the activity log for each contact for future reference.
- To create a mail merge go to the Contacts file
- Click on the Activity tab
- Select 'Mail Merge'
- You will then be asked to input the search criteria for your mail merge, i.e. tick the 'finance' box to find all finance companies.
- You will then be presented with a list of contacts that have been found, you need to check the total quantity at the top of the screen to make sure it was the amount expected
- You can then exclude contacts if you wish, by placing your cursor in any field on the row showing the contact you wish to exclude and pressing the 'Exclude' button at the top of the screen.
- If you wish to start your mail merge selection again you can do so by pressing 'Start Search Again'
- If you are happy with the chosen set press 'Continue Mail Merge'
- You will then be asked to enter your letter, or you can choose one of the standard letters and paste this as you would for a normal letter. You can also enter a title for your mail merge. An Email mail merge must have Email in the Activity Type field.
- When you are happy with the content of the letter, you then continue the mail merge and one letter will be created for each contact you have selected in the contacts file.
- You will then be shown a preview of each letter which you can scan through using the 'rolodex' on the top left of the screen in the grey bar.
- When you are happy with these, press continue
- Check the page setup and print options and print your letters
- You will be prompted to add a Next Contact Due date for your mail merge set so that you can chase up these contacts in the future – (you can opt to 'skip' this if required and it will leave the dates currently on the file untouched).
- Your letters will now appear in the activity screen on the contacts file.
- If you have sent your mail merge as emails, they will all be put into the drafts folder of the email software so that you can check them before sending.

13. Print Labels

- You can print Avery 7162 or Avery 7165 labels directly from the pre-set layouts.
- In the contacts file find the set of Contacts for whom you need to print labels

- Click on List View
- Click on Print Menu
- Choose which labels you wish to use
- Check Page Set-Up
- Check Print Screen
- You will be returned to the List View
- Click next to any of the contacts (in the mauve area) to return you to that contacts record screen.

14. Print DL envelopes

- You can print DL Envelopes directly from the pre-set layouts.
- In the contacts file find the set of Contacts for whom you need to print labels
- Click on List View
- Click on Print Menu
- Choose DL Envelope
- Check Page Set-Up
- Check Print Screen
- You will be returned to the List View
- Click next to any of the contacts (in the mauve area) to return you to that contacts record screen.

15. Amend/add categories

- To amend categories for the Details Screen in the contacts file, click on the Define Categories button on the bottom right of the screen.
- Amend or add to any list
- Be careful not to amend any category names that may already have data input against them, as you will not be able to find these again, only amend category names that have no data against them, or add new ones
- Click on Contacts to get back to the contacts file, and your new values will appear on the Details screen.

16. Edit Contact origination list and Status List (Contact file)

- The Contact Origination field and the Status field on the Contacts screen have pull-down lists to enable you to enter data in a consistent way.
- To add information into these lists, scroll down until you see 'Edit...' at the bottom of the list
- Click on 'Edit...'
- You will be presented with a screen showing all the values in the list
- Press Carriage return at the end of the list to add another value
- Then click done
- The next time you use the list it will contain the new value you have just added

17. Find a previous correspondence

- To find a letter / email/ fax/ filenote or phone call for a particular contact, simply go to the Activity tab on that contacts record, click on HISTORY and scroll down the list until you find the correct correspondence
- To re-read the contents, click on the VIEW button on the left of the line and this will take you to the activity file where you can re-read or even re-print the correspondence

18. Find all staff within a company

- Go to the Companies file
- Find the company you are interested in
- You will be able to see all the staff under the contacts tab
- Click on the VIEW button to the left of the name and this will take you through to the contacts file.
- Alternatively go to the Contacts file
- Search for the company
- Go to list view
- You will then get a list which you can print out

19. Set up a standard letter

- Go to Main Menu
- Press Standard Letters
- Press Add New Letter
- Input details and give the letter a “letter title” that you will remember
- This will now be available whenever you create a letter, fax or mail merge

20. Fill in the Set-up screen

- Go to Main Menu
- Click on Set-Up button
- Follow the on-screen instructions

21. Find various ‘lists’ of contacts and print them

- Click FIND in the contacts file
- Enter your find criteria (see 23.Advanced Searches for symbols that can be used to refine your searches)
- If you wish to search for more than one set of criteria at the same time i.e. first of all find all contacts who are in London, then add on all contacts who are in Middlesex. you can add to your search (whilst still in find mode) by asking for a new request (apple N on the Mac or Ctrl N on PC).
- When you have entered all your search criteria, then press Find on the left hand side of the screen
- When you have your found set, press LIST VIEW at the top of the screen
- You can then press “Print Report” to print this list and you will be prompted to input a title.
- You can also sort this list before printing it by pressing the sort button

22. Turn off all 'Mail To' boxes

- Go to List View in Contacts file
- Click Find All
- Click 'Turn Off Mail To'
- This re-sets all the Mail To boxes so that you can select a new ad-hoc set

23. Schedule/Diary Manager

- When you create a PENDING appointment/phone call etc, it automatically gets logged in the Schedule
- To view all entries for a person, you simply click SCHEDULE button anywhere that it is found on the system and (providing you have followed the instructions for setting up the STAFF FILE correctly prior to entering the appointment, it will appear in the appropriate persons diary.
- When an appointment or phone call has been actioned, you will be able to see the word actioned appearing in the summary screen on the schedule.
- Click the Daily, Weekly, Monthly or Full View buttons to view more or less of the Schedule.
- Click the STAFF button to view the diaries of others.

24. Advanced Searches

- When you press the Find Record button and enter your find criteria into a field, you can also use the following symbols to enhance your search, these are all available on a pull down menu on the grey bar to the left of the screen when in Find Mode.

<	less than
≤	less than or equal
>	greater than
≥	greater than or equal
=	exact match
...	range
!	duplicates
//	today's date
?	invalid date or time
@	one character
*	zero or more characters
" "	literal text
==	field content match

If you have any other queries about how to use this software, please feel free to email us at contacts@crusecontrol.com

Additional programming if required

Although Contacts! is sold as complete, it can be tailored to suit the requirements of any company. This work can either be undertaken by Cruse Control or by the clients themselves.

Additional Notes:

EMAIL FACILITY

This works with Outlook Express 5 and above. You must have Outlook selected as your default email software in your Internet preferences in the Control Panels. (Outlook Express is free) Also works with Entourage.

IMPORTING

Whenever you import data – deselect any arrows that are not required. Otherwise some fields may import ‘blank’ information that actually overrides information being entered by the system. Always select ‘perform auto enter functions’ when doing an import.

If you would like more information contact us via email :

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