

CONTACTS!

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London 2001

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Continue

CONTACTS!

CONTACTS! is a powerful yet simple to use contact management system.

It allows you to have many contacts for any company and you can store your own customised marketing information for each contact.

Mail merge, send letters, faxes and emails all from within CONTACTS! and store file notes and telephone messages. All of which can be viewed within an individuals contact record.

A full schedule (diary) system is available.

The format of CONTACTS! is designed to be used for any industry, large or small, who needs to manage their customer relations.

This document is designed to give you an overview of the key features of CONTACTS! If you would like to know more, or want to purchase the software, please contact us by one of the methods below.

Contact Us

If you wish to contact us you may do so in any of the following ways:

Email: contacts@crusecontrol.com
Phone: +44 (0) 1923 842 295
Fax: +44 (0) 1923 842 698

Contacts is available from Cruse Control creative services
contacts@crusecontrol.com www.crusecontrol.com

Companies screen

You can see many contacts for one company. If the address of the company changes, you only need to change it once and all the associated contacts will automatically get updated.

Close Database

New Record

Delete Record

Find Record

Find All

List View

Print Record

Menu

Company

New Corporation

Address

99 Hobbs Lane

Eastside

County

London

Postcode

EC45

Country

Ref Number

A12230

Status

Active

Phone

Fax

CO Email

GO

www.crusecontrol.com

GO

www.apple.com

GO

www.citileaselimited.com/welcom

Contacts

Categories

Notes

	First name	Surname	Direct Line	Mobile	
View	User				A
View	Mr John	Bloggs			A
View	James	King			A
View	Jane	Smith			A
View	David	White			A
View					

Companies

Contacts DETAILS screen

This is the screen where you enter the details of each individual contact. The check boxes at the bottom of the screen can be completely customised to suit your own business needs.

There is also a very useful Xmas Card button. on the bottom right.

The buttons at the top of the screen allow you to navigate easily through the system.

Contacts

Close Database **Add Contact** **Delete Contact** **Find Record** **Find All** **List View** **Print Record** **Menu** **Copy Address**

about **Info** **Navigation Buttons**

Name Mr John Bloggs **Contact ref** C11826 **Status** Active **address ref** A12230

Position **Direct Line** **Mod Date** 30/4/2002

Company New Corporation **Mobile** **Mod Time** 11:52 am

Address 99 Hobbs Lane **Phone** **Create date** 6/12/2001

Eastside **Fax** **Create time** 2:27 pm

County London **Email** helen@crusecontrol.com

Postcode EC45 **Web** www.crusecontrol.com

Country

Details **Activity** **Notes** **Links**

Contact Origination **Date of Contact** **Project Manager**

Business Sector **No of Staff**

☐ a 1-5 ☐ h 1,001-5,000 ☐ i 5,001-10,000

☐ b 6-10 ☐ j More than 10,000

☐ c 11-25 ☐ d 26-50 ☐ e 51-100 ☐ f 101-500 ☐ g 501-1,000

Annual Turnover **Important Comments**

☐ a Less than £40k ☐ h £10m-£20m

☐ b £41k-£100k ☐ i More than £20m

☐ c £101k-£200k

☐ d £201k-£500k

☐ e £501k-£1m

☐ f £1m-£5m

☐ g £5m-£10m

Action List

Schedule

Xmas Card

☐ yes

Mail to

☐ yes

Define Categories

Contacts PENDING screen

Clicking on the NEW ACTIVITY button on this screen creates a new PENDING activity which can be shown in the SCHEDULE (diary).

At-a-glance you can see all the appointments and phone calls etc, due for this particular contact in date and time order.

Close Database

Add Contact

Delete Contact

Find Record

Find All

List View

Print Record

Menu

Copy Address

about

Info

◀◀

◀

▶

▶▶

Name

Mr

John

Bloggs

Position

Company

New Corporation

Address

99 Hobbs Lane

Eastside

County

London

Postcode

EC45

Country

Contact ref

C11826

Status

Active

address ref

A12230

Mod Date

30/4/2002

Mod Time

11:52 am

Create date

6/12/2001

Create time

2:27 pm

Direct Line

Mobile

Phone

Fax

Email

helen@crusecontrol.com

Web

www.crusecontrol.com

Details

Activity

Notes

Links

Pending

Archive

Schedule

Action List

Mail Merge

New Activity

Ref	Date	Time	Type	Subject	Who	
View	10/5/2002	15:15	1.5 hour	Appointment	Surveys meeting	HC
View	15/5/2002	13:45	1 hour	Appointment	Lunch with Ken & John	JS
View	5/6/2002	12:00	1.5 hour	Appointment	Meeting with John	HC
View	15/6/2002	1:00	1 hour	Appointment	catch-up meeting to review project	JS
View	6/1/2003	12:30	2 hour	Appointment	Lunch with Key dm	JS

Contacts

Contacts ARCHIVE screen

Clicking on the NEW ACTIVITY button on this screen creates a new HISTORICAL activity, such as a letter, fax, email or file note.

Clicking on the MAIL MERGE button allows you to send a letter or email to many people at once, and keep a record of it.

Close Database

Add Contact

Delete Contact

Find Record

Find All

List View

Print Record

Menu

Copy Address

about

Info

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Name

Mr

John

Bloggs

Position

Company

New Corporation

Address

99 Hobbs Lane

Eastside

County

London

Postcode

EC45

Country

Contact ref

C11826

Status

Active

address ref

A12230

Mod Date

30/4/2002

Mod Time

11:52 am

Create date

6/12/2001

Create time

2:27 pm

Direct Line

Mobile

Phone

Fax

Email

helen@crusecontrol.com

Web

www.crusecontrol.com

Details

Activity

Notes

Links

Pending

Archive

Schedule

Action List

Mail Merge

New Activity

Ref	Date	Type	Subject	Content	User
View	5/6/2002	Fax			HC
View	5/6/2002	Letter	hjgfhfhy	Our latest software has been released! Its	HC
View	5/6/2002	Email	fgklhfdskhgj		HC
View	5/6/2002	Phone Call	kljhkjgh	hjgjjhgk	HC
View	27/5/2002	Letter	hjfhjdhdgdchgdg		HC
View	21/5/2002	Mail merge		Thank you for your enquiry	HC
View	21/5/2002	Mail Merge		Our latest software has been	HC
View	21/5/2002	Email mail		At regular intervals we check the validity of	HC
View	21/5/2002	Email	RE: Tomorrows		HC

Contacts

Contacts LINKS screen

You can link to web addresses for the company, and also any Word, Excel and Powerpoint files if needed.

Close Database

Add Contact

Delete Contact

Find Record

Find All

List View

Print Record

Menu

Copy Address

about

Info

◀◀

◀

▶

▶▶

Name

Mr

John

Bloggs

Position

Company

New Corporation

Address

99 Hobbs Lane

Eastside

County

London

Postcode

EC45

Country

Contact ref

C11826

Status

Active

address ref

A12230

Direct Line

Mobile

Phone

Fax

Email

helen@crusecontrol.com

Web

www.crusecontrol.com

Mod Date

30/4/2002

Mod Time

11:52 am

Create date

6/12/2001

Create time

2:27 pm

Details

Activity

Notes

Links

Web Addresses

GO

www.crusecontrol.com

X

↑

GO

www.apple.com

X

GO

www.citileaselimited.com/welcome.htm

X

GO

X

↓

Linked Files

Link

Word

ibook hd:confirmation.doc

X

↑

Link

Excel

hd name:work folder:sub folder:file name

X

Link

X

Contacts

Appointment screen

When you create an appointment, you can invite people to attend your meeting. They will each get an email with details of the meeting.

Activity

Delete Record

List View

Schedule

Contacts

Menu

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⏩

⏴

⏵

Creation (comp) Date 27/5/2002

Action Due: Date 10/5/2002

Activity Type Appointment

PENDING

Time 15:15

Contact John Bloggs Sample Company

Duration 1.5 hour

Subject Surveys meeting

Actioned

Activity Content To review survey criteria, also attending:
Jason
Mark
Sheila

User Name Helen Cruse

Organise Meetings

Add Attendee

Email Attendees

Email Amends

<div>View</div>	James Bolan	unconfirmed	<div>⏶</div>
<div>View</div>	Jane Smith	NOT ATTENDING	
<div>View</div>	Kevin Neils	unconfirmed	
<div>View</div>			
			<div>⏷</div>

Acceptance screen

Attendees can confirm their attendance on the screen below. An email is then generated and sent automatically to the organiser of the meeting.

Activity - Attendee

Delete Record

List View

Schedule

Contacts

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Creation Date

21/5/2002

Activity Type

Appointment

Contact

John Bloggs

New Corporation

Subject

Surveys meeting

Details

To review survey criteria, also attending:
Jason
Mark
Sheila

Meeting Date

10/5/2002

Meeting Time

15:15

Duration

1.5 hour

Attendee Name

James Bolan

View Meeting

Comments

Accept Meeting

unconfirmed

Decline Meeting

Meeting Organiser

Helen Cruse

h.c@sampleco.co.uk

Schedule screen

When you create any pending activity, it will automatically appear in your own schedule. This can be viewed in Daily, Weekly and monthly format and you can also see a full view of all scheduled activities.

By clicking on the Staff button, you can view the Schedules of other staff within your company.

As a management tool, clicking the ACTION LIST button either on the main menu, or in the CONTACTS file allows you to view a cross-section of schedules over any time period.

[illegible]

Email screen

You can send an email and record it directly on the system, and add CC's to the email too.


Activity - Email Entry		Delete Record	List View	Schedule	Contacts	Menu
Activity Type	Email			Date	31/8/2001	
Contact	John Bloggs	Sample Company		User	Helen Cruse	
You may type in an alternative email address if required						
Email address	julie@sampleco.com			?	?	
CC	name@valid.co.uk; smith@japes.com			Send auto email	Send Manual email	
Subject	Meeting Dates			Check Spelling	Input Auto Signature	
Content of Email	<p>Further to our earlier discussions, please find below a list of dates and times. Could you get back to me by return and I shall confirm the most convenient time for us all.</p> <p>Thursday 27th 2pm - 5pm Friday 28th 9am - 12pm</p> <p>Tuesday 2nd 1pm - 4pm Friday 5th 2pm - 2pm</p> <p>Many thanks</p> <p>Jane Smith Director DL: 020 7000 1000 Fax: 020 7000 1011 Email: j.smith@sampleco.co.uk</p>					

Letter screen

When creating a letter, you can either type it as you create it, or choose a letter from the standard letters file (which you would have previously entered).


You can write an alternative salutation, insert an Auto-Signature and spell check your letter before printing it. From the Contacts file, you can also print an envelope, or print many addresses onto Labels.

You can also set up your own letterhead styles, or leave them blank to print on your own headed paper.

MAIL MERGE		Delete	Preview	Print Letter	List View	Contacts
Salutation	<input checked="" type="radio"/> Standard <input type="radio"/> Other					
Chosen	John					
Other						
29/8/2001						
Mr John Bloggs New Corporation 99 Hobbs Lane Eastside London EC45		Sample Company 24 The High Street New Town Brightshire				
		Input Auto Signature		Check Spelling		
		View Standard Letters		Paste Standard Letter		
		Letter ref no				
Dear John		Activity Subject				
		Check Details Mailing				
Activity Content						
<p>At regular intervals we check the validity of information held on our database. As we have been unable to contact anyone in your company by phone in the past week, please could you confirm that all of your address details are correct by calling 0990 090909090, by emailing us on data@samplecompany.com or by writing to us at the address above, and reconfirm your telephone details.</p> <p>Thank you very much for your assistance in this matter.</p> <p>Yours sincerely,</p> <p>Jane Smith Director DL: 020 7000 1000 Fax: 020 7000 1011 Email: j.smith@sampleco.co.uk</p>						

Fax screen

The way in which you set up a fax is exactly the same as creating a letter. The layout for the fax is also fully customisable.

FAX		Delete	Preview	Print Fax	List View	Contacts
Salutation	<input checked="" type="radio"/> Standard <input type="radio"/> Other					
Chosen	John					
Other						
						Sample Company 24 The High Street New Town Brightshire BR1 1AB Tel: 019621-568-218 Fax: 019621-568-219 Email: e-mail@samp.com Web: www.samp.com
FAX MESSAGE						
To:	John Bloggs New Corporation	Date:	18/6/2002	<input type="button" value="Input Auto Signature"/>		
Fax No:	02005 5689 235	Direct Line:		<input type="button" value="Check Spelling"/>		
From:	Jane Smith					
Subject:	<input type="text" value="Introduction"/>				<input type="button" value="Paste Chosen Fax"/>	
Dear John		Fax ref no	<input type="text" value="L001"/>	<input type="button" value="Initial Contact Letter"/>		
Activity Content						
<p>Thank you for your enquiry.</p> <p>We are pleased to enclose a booklet with full details of all services on offer.</p> <p>Up to date pricing is published on our website at www.ourwebsite.com. Should you wish to speak to someone about your requirements please feel free to call on 0990 090909090 and someone in our customer services division will be more than happy to deal with your enquiry.</p> <p>We look forward to hearing from you in due course.</p> <p>Yours sincerely,</p> <p>Jane Smith Director DL: 020 7000 1000 Fax: 020 7000 1011 Email: j.smith@sampleco.co.uk</p>						