

CHAPTER 7

ADDRESS BOOK MANAGER

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Overview

SDS HelpDesk provides quick access to various human resource and customer information. Use the Address Book Manager to enter information about any of your contacts. These can include customers, internal employees, tenants, vendors, contractors, etc.

Specify what skills, expertise, or knowledge your contacts may have. Then use the built-in search engine to locate individuals or organizations with the right skills and know-how to help resolve an issue.



Click the **Address Book** icon in the toolbar to open the module.

The screenshot shows the 'Address Book' application window. It features several sections: 'Contact' with fields for Name, Identifier, and Title; 'Selection Criteria' with dropdowns for Organization and Contact Type; 'Skills' with an 'Add' and 'Delete' button; 'Email' with fields for Website and Email; and 'Mailing Address' with fields for Address1, Address2, City, Zip, Country, and Dept/MS. A 'Rate' field is also present. A toolbar on the right contains buttons for Exit, Clear, Find, Add, Update, Delete, Preview, and Print. Callout boxes provide instructions: one points to the 'Found:' field stating it shows the number of contacts meeting search criteria; another points to the 'Skills' list stating skills assigned to a contact are listed there; and a third points to the 'Rate' field stating it is used to enter a contractor's hourly rate. Green boxes highlight the 'Contact' and 'Organization' fields as mandatory.

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NOTE: The green boxes around the contact name and organization fields indicate that these are mandatory fields and must be filled in. You can add a generic

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organization such as “individual” or “none” if the contact is not associated with an organization.



Steps to . . .

Add a New Contact

The Address Book lets you enter all of your contact information in one place. You can also view any contact’s information on one screen.

1. Type the person’s name in the Contact box.

NOTE: You must use the format of first name, middle initial, last name. The middle initial is optional. **EXAMPLE:** John Jones or John E. Jones

2. Some contacts, such as internal employees, may have unique ID numbers. Enter this number in the Identifier box.

NOTE: Steps 3 and 4 refer to the Selection Criteria portion of the Address Book screen. It is recreated here for your reference.

Click on the label to open the PickList. Double-click an item and it is entered for you automatically.

The screenshot shows a form titled "Selection Criteria" with two dropdown menus. The first is labeled "Organization:" and the second is labeled "ContactType:". Both have a small downward arrow on the right side. A text box to the left of the form contains instructions on how to use the dropdown menus.

3. Click the down arrow to select an organization from the drop down list, or click the Organization label to select from a PickList. If the organization is not in the list, type the name in the Organization box. The new organization is added to the database when you add the new contact.

NOTE: Some contacts may not be associated with an organization. Since this is a mandatory entry for each contact, just add a general item called None, and use it for these situations.

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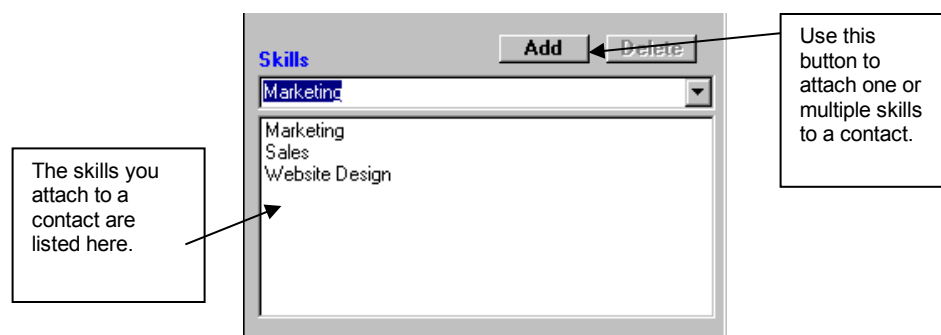
Add a New Contact (cont'd)

4. Contacts can be classified into various groups depending on your relationship with them. These groups may be customers, tenants, contractors, internal employees, individuals, etc. SDS HelpDesk refers to these groups as Contact Types. You either can add contact types in Lookup Tables, or on-the-fly in Address Book.

Click the down arrow to select a contact type from the drop down list, or click the Contact Type label to select from a PickList. If the contact type is not in the list, type the new item in the Contact Type box. The new contact type is added to the database when you add the new contact.

5. Add other information in the boxes provided. You can also add comments or notes about a contact in the Notes box. This can be any information that may be helpful to you such as special days or hours the contact is available, spouse name, birthday, quality of work, etc. You can add up to 256 characters in the Notes box.
6. If the contact is a contractor, you can enter his/her hourly rate in the Rate box.
7. You can also specify what skills, expertise, or knowledge the contact might have. Skills can include mechanical, plumbing, programming, bookkeeping, painting, etc. This information is useful when you need to find individuals with the right skills and know-how to help you resolve an issue.

NOTE: The attach skills function is located in the bottom left corner of the Address Book screen. It is recreated here for your reference.



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Add a New Contact (cont'd)

8. Click the down arrow to select an existing skill from the drop down list, or click the Skill label to select from a PickList. If the skill is not in the list, type the new item in the Skill box. The new skill is added to the database when you add the new contact.
9. Click the **Skills Add** button. The skill is added to the contact's list box. You can attach as many skills to a contact as is appropriate.
10. When you are finished entering all of the contact's information, click the **Address Book Add** button which is located in the upper right portion of the module screen. This saves all of the information for the contact to the database.
11. To enter another contact, click the **Clear** button to give you a blank screen.

Modify Contact Information

1. Select the contact's organization from the drop down list, or click the Organization label to select from a PickList.
2. Click the **Find** button. The number of located contacts is displayed in the Found box. Select the name of the person whose information you want to modify from the Contact drop down box
3. Modify or add information for this contact.
4. When finished, click the **Update** button to save your changes.

Delete a Contact

1. Select the contact's organization from the drop down list, or click the Organization label to select from a PickList.
2. Click the **Find** button. The number of located contacts is displayed in the Found box.
3. Select the name of the person you want to delete from the Contact drop down box
4. Click the **Delete** button.

NOTE: You won't be able to delete a contact if he/she is associated with an issue. This is done to maintain the issue history.

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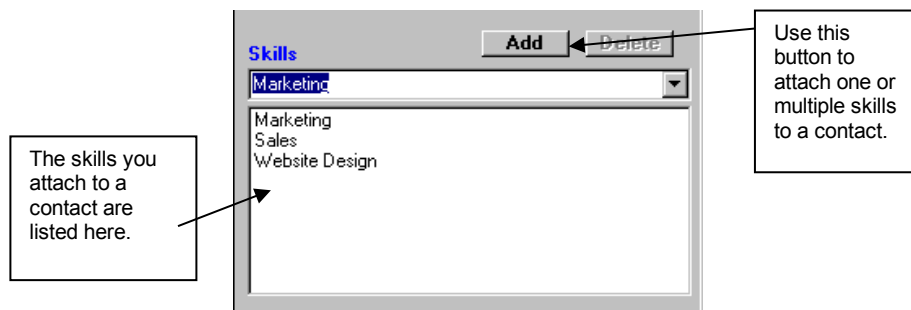
Use Existing Contact Information as a Template

You may have a number of contacts at the same organization. Rather than clearing the Address Book screen and starting from scratch, you can use the information for a current contact as a template, and then edit it.

1. Select the organization you want from the Organization drop down list, or click the Organization label to select from a PickList.
2. Click the **Find** button. The number of located contacts is displayed in the Found box.
3. Select one of the contacts from the Contact drop down list.
4. Change the contact name and any other appropriate information.
5. Click the **Add** button. This adds the new contact, but does not change the information for the contact that you used as a template.

Assign Skills to a Contact

You can specify what skills, expertise, or knowledge a contact might have. Skills can include mechanical, plumbing, programming, bookkeeping, painting, etc. This information is useful when you need to find individuals with the right skills and know-how to help resolve an issue. The relevant portion of the Address Book screen is recreated here for your reference.



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Assign Skills to a Contact (cont'd)

1. Select an existing skill from the Skills drop down list, or click the Skills label to select from a PickList.
2. Click the Skills **Add** button or the **Enter** key. The skill is added to the contact's list box. You can attach as many skills to a contact as is appropriate.
3. If you want to remove a skill from a contact, select the skill from the contact's list box. Click the **Delete** button.

Use the Search Engine to Find a Contact or Groups of Contacts

The Search Engine provides a flexible and powerful way to find people and companies in the Address Book. Just about any criteria can be used to find information.

The Search Engine supports “wildcards” so that it is possible to enter just a few letters of a criterion in order to find possible matches. A question mark (?) stands for any single character and an asterisk (*) stands for a number of characters. Wildcards can be placed before, after, or in the middle of other characters.

In the following examples a single criterion at a time is used for searching. Please keep in mind that you may narrow the amount of search results by using multiple search criteria at the same time.

Searching for Contacts

The Address Book module lets you search for people based on first or last name, skill, area code, phone extensions, a partial phone number, city, state, zip code, and just about anything else that the screen has an entry field for. The Found box displays the number of contacts that meet your search criteria.

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Use the Search Engine to Find a Contact or Groups of Contacts (cont'd)

The following are some Address Book search examples:

Search on Last Name

The screenshot shows a search interface with the following elements:

- Contact:** A text input field with a dropdown arrow on the right. A callout box points to this arrow with the text: "Click the Contact down arrow to view the filtered list."
- Identifier:** A text input field.
- Title:** A text input field.
- Found:** A box displaying the number "111". A callout box points to this box with the text: "This box shows the number of contacts who meet your search criteria."
- Selection Criteria:** A section containing:
 - Organization:** A dropdown menu.
 - ContactType:** A dropdown menu with "Customer" selected.

1. Click the **Clear** button. This gives you a blank Address Book screen.
2. If you wanted to find a contact with the last name Scott, but you didn't know their first name, enter ***Scott** in the Contact box. The asterisk represents all characters before "Scott."
3. Click the **Find** button. The search engine will find all contacts with Scott as the last name. Because the asterisk is placed at the beginning, it will also find names that have "Scott" within them (e.g., Greg McScott). When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Contacts (cont'd)

Search by Partial Name

1. Click the **Clear** button to give you a blank Address Book screen.
2. You might not be sure how to spell a contact name. The Search Engine lets you enter a portion of the name. For example, enter ***cot*** in the Contact box. The asterisks represent all characters before and after “cot.”
3. Click the **Find** button. The Search Engine will find all contacts that have “cot” someplace in their name (e.g., Alan Westcott, Chris Scott, and Ascot Jones). When multiple records are found, press the **down arrow** key to sequence through the records.

Search on First Name

1. Click the **Clear** button to give you a blank Address Book screen.
2. A customer calls and tells you his name is Chris, but he doesn't give you his last name. Enter **Chris*** in the Contact box. The asterisk represents all characters after “Chris.”
3. Click the **Find** button. The Search Engine will find all records for Contacts whose first name begins with “Chris” (e.g., Chris Jones, Christina Alcott, and Christopher Scott). When multiple records are found, press the **down arrow** key to sequence through the records.

Search by Telephone Number

1. Click the **Clear** button to give you a blank Address Book screen.
2. You need to find a contact with a 714 area code. Enter ***714*** in the Office phone number box. The asterisks represent all characters before and after “714.”
3. Click the **Find** button. The Search Engine will find all records for Contacts with a 714 area code for their work phone number. When you place an asterisk before and after the number, it doesn't matter if the phone number is entered as (714) or 714 or 714-. When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Contacts (cont'd)

Search by Telephone Number (cont'd)

4. Click the **Clear** button to give you a blank Address Book screen.
5. You want to find a contact but you are not sure of the area code. You do know that the area code was entered with parentheses. Enter **(21?)*** in the Office or Home phone number box. The question mark represents one character, while the asterisk represents multiple characters.
6. Click the **Find** button. The Search Engine will find all records with area codes that begin with “21.” If you’re not sure how area codes are entered, you can type in ***21?***. Entering it this way will give you a different search result. Not only will you get records with area codes that begin with “21,” but you will also get records with phone numbers that end with 21_, or that have 21_ embedded in the middle of the number.

Search by Zip Code

1. Click the **Clear** button to give you a blank Address Book screen.
2. To see records for all contacts with a particular zip code, enter the zip code followed by an asterisk in the Zip data entry box (e.g., 80027*). The asterisk represents all characters after “80027.”
3. Click the **Find** button. When you use the asterisk, the Search Engine finds all records that have been entered with five or with ten zip code characters (e.g., 80027 or 80027-8140). When multiple records are found, press the **down arrow** key to sequence through the records.

Search by City

1. Click the **Clear** button to give you a blank Address Book screen.
2. Enter a city in the City data entry box.
3. Click the **Find** button. If you want to type just a part of a city name, use an asterisk (e.g., *ville, Louis*, *Louis*). When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Contacts (cont'd)

Search by State

1. Click the **Clear** button to give you a blank Address Book screen.
2. Enter the two-character state code in the State/Province data entry box.
3. Click the **Find** button. If you are not sure of the state code, just type one character with an asterisk (e.g., *N, C*). The Search Engine will find all contacts that are located in a state with a code that either begins or ends with the letter you entered. When multiple records are found, press the **down arrow** key to sequence through the records.

Search by Street Address, Country, Department

1. Click the **Clear** button to give you a blank Address Book screen.
2. You may want to search using several fields. For example, you may want to find contacts in a specific country and in a specific department, but you don't know the complete address. Enter a portion of the address in the Address1 data entry box. Use an asterisk before or after the address to represent the portion you aren't sure of (e.g., *Broadway, *Main*). Enter the country in the Country box and the department in the Dept/MS box. When multiple criteria are used, the Search Engine looks for contacts that meet **ALL** the criteria.
3. Click the **Find** button. While multiple records are found, press the **down arrow** key to sequence through the records.

Search by Organization

1. Click the **Clear** button to give you a blank Address Book screen.
2. Enter all or a portion of the organization name in the Organization data entry box. Use an asterisk before or after the name to represent the portion you didn't include (e.g., *Data*, Scott Data*).
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Contacts (cont'd)

Search by Organization Using the PickList

1. Click the **Clear** button to give you a blank Address Book screen.
2. Click the **Organization label**. A PickList of Organizations will appear. **Double-click** the organization you want. The PickList will close.
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search by Organization Using the Drop Down List

1. Click the **Clear** button to give you a blank Address Book screen.
2. Click the **Organization drop down arrow** to see the list of organizations. Select the organization you want.
3. Click the **Find** button. When multiple records are found press the **down arrow** key to sequence through the records.

Search by Organization Using Lookup Tables

1. Click the **Clear** button to give you a blank Address Book screen.
2. **Right-click** on the Organization label. A Lookup Table of Organizations will appear. **Double-click** on the organization you want. The Lookup Table will close.
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search on Contact Type

1. Click the **Clear** button to give you a blank Address Book screen.
2. Enter a type of contact in the Contact Type box (e.g., employee, vendor, customer, or tenant).
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Contacts (cont'd)

Search on Contact Type Using the PickList

1. Click the **Clear** button to give you a blank Address Book screen.
2. Click the **Contact Type label**. A PickList of Contact Types will appear. **Double-click** the contact type you want (e.g., employee, vendor, customer, or tenant). The PickList will close.
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search on Contact Type Using the Drop Down List

1. Click the **Clear** button to give you a blank Address Book screen.
2. Click the **Contact Type drop down arrow** to see the selection list. Select the contact type you want (e.g., customer, employee, tenant, or vendor).
3. Click the **Find** button. When multiple records are found press the **down arrow** key to sequence through the records.

Search on Contact Type Using Lookup Tables

1. Click the **Clear** button to give you a blank Address Book screen.
2. **Right-click** on the Contact Type label. A Lookup Table of Contact Types will appear. **Double-click** on the contact type you want (e.g., tenant, customer, employee, or vendor). The Lookup Table will close.
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Contacts (cont'd)

Search on Title

1. Click the **Clear** button to give you a blank Address Book screen.
2. Enter all or a portion of the title in the Title data entry box. Use an asterisk before or after the title to represent the portion you didn't include (e.g., Sales*, *Manager).
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search on Identifier

1. Click the **Clear** button to give you a blank Address Book screen.
2. Some contacts, such as internal employees, may have an ID number or a unique number (e.g., social security) to identify them. Enter all or a portion of the number in the Identifier data entry box. Use an asterisk before or after the number to represent the portion you didn't include (e.g., *006, 532*).
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search on Skill

1. Click the **Clear** button to give you a blank Address Book screen.
2. Enter all or a portion of a skill in the Skills data entry box. Use an asterisk before or after the skill to represent the portion you didn't include (e.g., Data*, *Support).
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Searching for Contacts (cont'd)

Search on Skill Using the PickList

1. Click the **Clear** button to give you a blank Address Book screen.

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2. Click the **Skills label**. A PickList of Skills will appear. **Double-click** the skill you want. The PickList will close.
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search on Skill Using the Drop Down List

1. Click the **Clear** button to give you a blank Address Book screen.
2. You may want to search using multiple skills. Click the **Skills drop down arrow** to see the selection list. Select the skill you want. Click the **Skills Add** button.
3. Click the Skills drop down arrow to open the selection list again. Select another skill. Click the **Skills Add** button.
4. Click the **Find** button. The Search Engine looks for all contacts that have both skills. When multiple records are found press the **down arrow** key to sequence through the records.

Search on Skill Using Lookup Tables

1. Click the **Clear** button to give you a blank Address Book screen.
2. **Right-click** on the Skills label. A Lookup Table of Skills will appear. **Double-click** on the skill you want. The Lookup Table will close.
3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

NOTE: *When only one criterion is set, the search engine looks for all records that match. This usually results in a broader and therefore larger number of records. When multiple criteria are set the search engine looks for contacts that match ALL of the criteria. This narrows the search and usually results in fewer records.*

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Print SnapShot Report

You may want to print out information for just one contact.

1. Select the organization you want from the Organization drop down list, or click the Organization label to select from a PickList. Click the **Find** button.
2. Select the contact from the **Contact** drop down list
3. Click the **Preview** button to see the report before it is printed.
4. Click the **Print** button to get a SnapShot Report for this contact.

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