

## **Step-by-step guide to using CONTACTS!**

CONTACTS! is a multi-user contact management system. It has been created using FileMaker Pro 6. It will also run on FileMaker Pro 5.5

### **This Step-by-Step Guide**

This guide has been designed to get you up and running in CONTACTS! quickly and easily, from first installation through daily use to special projects.

Two symbols are your guide to what to do:

- indicates an action, something to do, a button to press, etc.
- + indicates information to read and digest!

Keep this guide handy when you first work in CONTACTS! so you can easily find answers; no need to learn it all by heart! Enjoy!

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### **Installation**

Each workstation running the solution will need to have a copy of FileMaker 5.5 or 6 installed. It is also recommended that the files be hosted using FileMaker Server 5 or 5.5 or 6, although it is possible to use a copy of FileMaker to host the CONTACTS! system, but it is not recommended. If you have ordered FileMaker with your CONTACTS! software it has been provided on this CD and can be installed directly from the CD.

For multi-user versions, the CONTACTS! files only need to be loaded onto the hosting machine (usually a server) and then opened. All other users access the database by doing the following:

- Open FileMaker on their own computer.
- When prompted select 'Open an existing file' and select OK.
- Select HOSTS.
- Double click on the filename ending "...MENU.fp5". This will open the CONTACTS! menu.
- If 'Hosts' does not find the file "...MENU.fp5", you may need to 'Specify Host' by putting in the IP address of the machine hosting the database. (Your internal IT Support Centre should be able to help you set this up.)

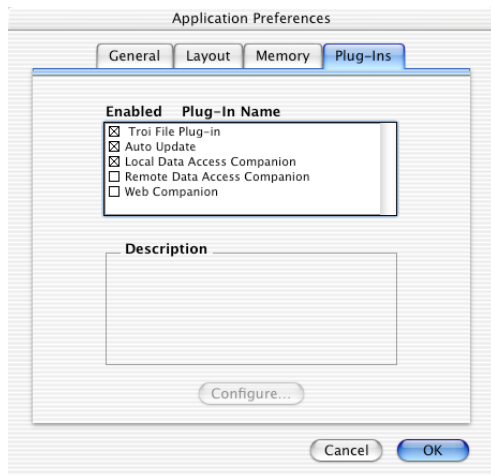
+ The password is supplied in your letter, which accompanies your purchase.

If you have purchased a single user licence, you only need to install FileMaker 6 onto your machine and drag the CONTACTS! folder onto your hard drive. Then double click the filename ending "Menu.fp5" to start the database.

### **Troi File Plug-in**

- If you are using a Mac, place the file "Troi File Plug-In" in the FileMaker Extensions folder in the FileMaker application folder.

- If you are using a PC, place the file “trfile.fmx” into the SYSTEM directory inside the FileMaker directory.
- You should also enable the plug-in under the FileMaker application preferences. In FileMaker, go to the ‘File’ menu, and choose ‘Preferences...Application’. Click on the ‘Plug-Ins’ tab and check the box next to ‘Troi File Plug-In’.



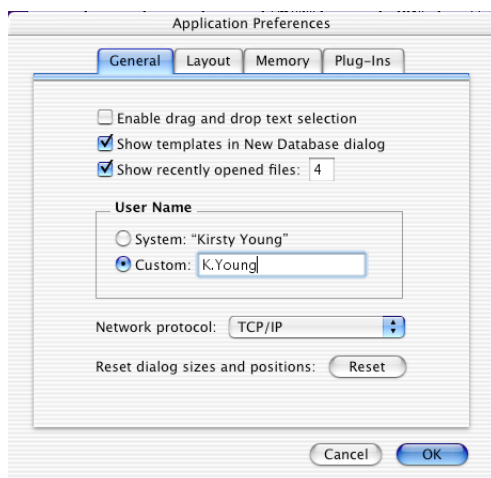
### **Setting up the staff file**

This is **essential** to make the **Schedule** work. (For further details on the Schedule, see section 27. Schedule (Diary).)

- Go to the main Menu, select button ‘Set-up’.
- Select the ‘Staff File’ button. You can fill in all your details as required.

+ In order for your name to be automatically entered onto your activities you must do the following.

- On your own machine, in FileMaker, go to the ‘Edit’ menu.
- Choose ‘Preferences... Application’.
- On the ‘General’ tab, change the ‘User Name’ to ‘Custom’ and type your name **EXACTLY** as it appears in the staff file.



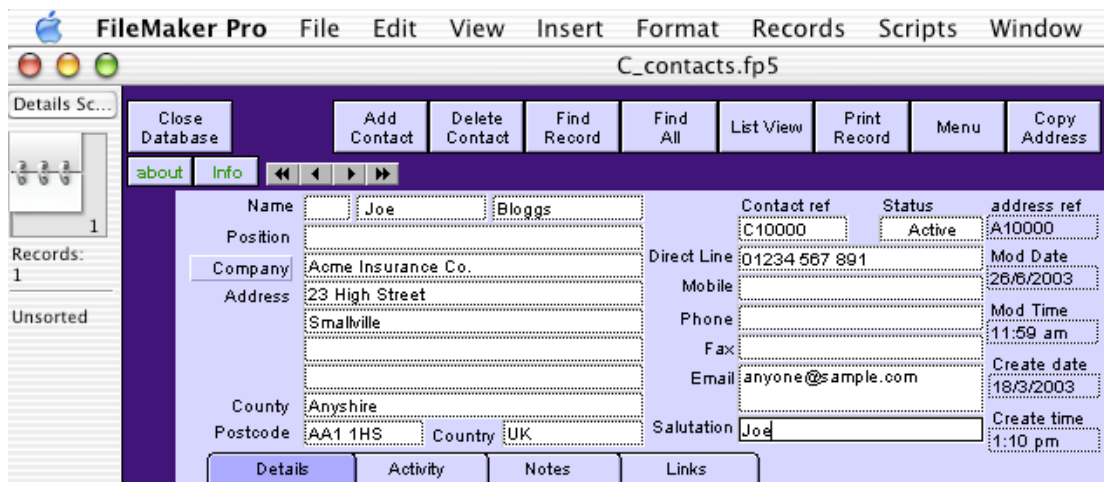
## **What can CONTACTS! do?**

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. Log an Appointment.
13. Move Pending Appointments.
14. Create a Mail Merge to letters.
15. Create a Mail Merge to emails.
16. How to send Attachments with Email Merges.
17. Print Labels.
18. Print DL envelopes.
19. Amend/add categories.
20. Edit Contact origination list and Status List (Contact file).
21. Find a Previous Correspondence.
22. Find all Staff within a Company.
23. Set up a Standard Letter.
24. Fill in the Set-up screen.
25. Find various 'Lists' of contacts and print them.
26. Turn off Mail To button.
27. Schedule/Diary Manager.
28. Week View and Month View in Diary.
29. Create Web Links.
30. Link files from Other Applications to a Contact record.
31. Import from other databases and/or Excel spreadsheets.
32. Advanced Searches.

## How to use the screens

CONTACTS! is easy to use – nearly everything you need to do is just a click away. There are three main areas of the screen you'll use:



1. The top row (right of the Apple) are the FileMaker drop down menus. They will be there whenever you use FileMaker. So will the column to the left, that shows the number of records in the database, etc. Look here occasionally for buttons, especially to do with instructions to 'Find' or 'Continue'.

2. The next row of buttons (under the file name grey bar) are unique to CONTACTS! They are the quickest route to all sorts of tasks. They are your best friends in CONTACTS!

3. The area underneath contains contact details, etc, and will change according to what job you are doing; finding a record, writing a letter, etc.

### **1. Add a new contact**

- Go to main Menu.
- Click the 'Contacts' button.
- Click the 'Add Contact' button on the top left of the screen.
- Fill in the First Name, Surname, Postcode and Company name.
- Press the button '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.
- Follow the on-screen messages which will help you through this process.
- If the company does not already 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 'View' button next to the person's name. 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 at any time, click the word 'Company' just left of the Company field on the Contact screen, (it has a thin black line around it) 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' from the top row of CONTACTS! buttons.
  - Enter the company name and postcode.
  - Press the 'Continue' button under the box.
- + This will automatically search the database to see if the company already exists.
- Follow the on-screen instructions.

## **3. Delete a Company**

- + TAKE CARE! If you delete a Company, all the associated contacts will be deleted with it, and all of their correspondence too!
- + 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. TAKE CARE! THERE IS NO UNDO FUNCTION FOR THIS PROCESS!
  - To mark a company as 'Inactive', go to the Company record, and click on the 'Status' field in the top right hand corner of their record.
  - Choose 'Inactive' from the drop down list. They are now Inactive! (Note: this does not delete them from any mailing lists unless you *choose* to exclude them. (See 32. Advanced Searches for more information.)

## **4. Delete a Contact**

- + TAKE CARE! 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. TAKE CARE! THERE IS NO UNDO FUNCTION FOR THIS PROCESS!
  - To mark a contact as 'Inactive', go to the contact's record, and click on the 'Status' field in the top right hand corner of their record.
  - Choose 'Inactive' from the drop down list. They are now Inactive! (Note: this does not delete them from any mailing lists unless you *choose* to exclude them. (See 32. Advanced Searches for more information.)

## 5. Amend Company or Contact details

- If a Company name changes, or they move address etc, simply over-type the new details on the Company screen, and all associated contacts will automatically have their company and/or address details updated!
- If a contact's 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 remain accurate. All new Activities will have the new address and name details.

## 6. Create an Action List

+ This will enable you to get a list from the Activity file of any dealings you have had with any client, whether it was a letter, fax, phone call, or email. This is a great way of checking all the activity with a single organisation, or for example to check how many calls have been made on a certain day by a particular person.

+ The Action List can show you this activity under a variety of search criteria, so you can exactly tailor your list to your needs.

+ The search criteria offered are:

- Activity created date. *The date the Activity was created on the system.*
- Action due date. *The date the Activity is due to be completed by/on.*
- Activity type. *Letter, fax, email, phone call, etc.*
- Pending. *Outstanding tasks yet to be completed.*
- User. *The person who is to do the task.*
- Client Company. *The company you are dealing with.*
- Activity Subject. *What the task is about, e.g. "June mailshot".*
- Activity Content. *Shows the first line of the Activity text.*

+ To make and print an Action List, do the following:

- Either go to the Menu and click on 'Action List'.
- Or click on 'Action List' from the Contacts screen. (This button has a special place, on the right hand side under the Creation Time field.)
- You will be prompted to enter your search criteria, e.g. Action Due Date = 1/1/2004.
- When you have done this, press 'Create List'.

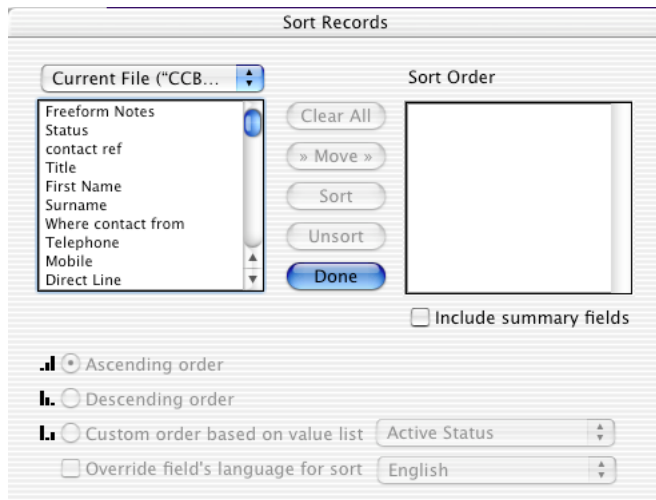
+ Your list appears as a summary List (a list that summarises the important information.) You can either work from this list on the screen or print it using the 'Print List' button on the top CONTACTS! button bar.

- To View a full list, (one that shows you more details of each activity), click on 'View Full List'. You can also print this more detailed list by clicking the 'Print List' button.

+ You can also sort the list alphabetically, or in date order, by any of the above categories, or combinations of them.

- To Sort a list, go to the FileMaker Records menu and select Sort.....
- Choose a field to sort by in the left column, click 'Move' and this field now appears in the right column. Add more as required. The fields will sort in

- that order from the top down.
- To remove any field from the Sort list, select it in the right column, click on 'Clear' and it's cleared off your sorting list.
- Click 'Sort'. You can print your sorted list by clicking 'Print List'.
- When you have finished, simply click on either Contacts or Menu.



## 7. **Send a letter**

- Go to main Menu.
- Select 'Contacts'.
- Click 'Find' on the CONTACTS! top button bar.
- Find the contact to whom you wish to write.
- Click on the 'Activity' tab. (This is in the row of tabs *under* the contact address details, etc.)
- Click on the 'New Activity' button. (Situated in the row of special buttons *below* the row of tabs.)
- Choose 'Letter' from the drop-down list in the 'Activity Type' box.
- If your name has not automatically entered, or if you are entering the letter on behalf of someone else, choose the correct name from the pull-down list in the 'User' box.
- Enter a subject into the 'Activity Subject' box.
- Press 'Continue'. (If you change your mind about creating a letter, just press 'Cancel'; the letter will be deleted and you will be returned to the Contacts screen.)

- 
- You will then be presented with the Letter screen.
  - To choose a Standard Letter from the list on the top right of the letter, click on the 'Letter Ref No' field, and select your letter from the drop-down list.
  - To paste this into your new letter, just press 'Paste Standard Letter' to insert it into the body of the correspondence. (For more on Standard Letters, see 23. Set up a Standard Letter.)
  - Or you can simply type your new letter direct into the 'Activity Content' field.
  - When you have finished, you can spell check your letter by pressing the 'Check Spelling' button on the right of the screen.

- You can Preview your letter prior to printing by pressing the 'Preview' button at the top, then press 'Continue' in the left FileMaker column to come back to the Letter screen.
- To Print your letter, press the 'Print Letter' button, at the top of the screen.
- Check the page set-up is correct 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 Fax as the correspondence type, and continue up until you reach the dotted line.

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- You will then be presented with the Fax screen,
  - To choose a Standard Letter from the list on the top right of the letter, click on the 'Letter Ref No' field, and select your letter from the drop-down list.
  - To paste this into your new Fax, just press 'Paste Chosen Fax' to insert it into the body of the correspondence. (For more on Standard Letters, see '23. Set up a Standard Letter.')
  - Or you can simply type your new Fax direct into the 'Activity Content' field.
  - When you have finished, you can spell check your Fax by pressing the 'Check Spelling' button on the right of the screen.
  - You can Preview your Fax prior to printing by pressing the 'Preview' button at the top, then press 'Continue' in the left FileMaker column to come back to the Letter screen.
  - To Print your Fax, press the 'Print Fax' button, at the top of the screen.
  - Check the page set-up is correct 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.

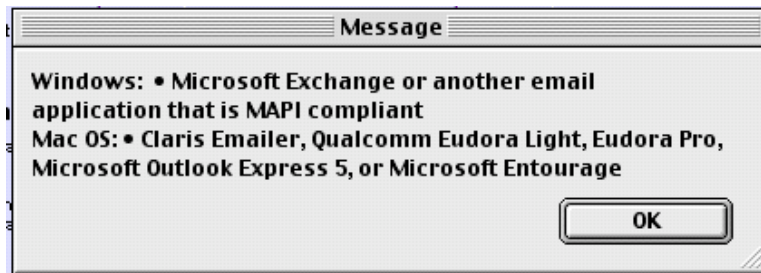
## 9. **Send an Email**

- Follow the instructions on 7. Send a letter, but select Email as the correspondence type, and continue up until you reach the dotted line.

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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.
  - You can also enter CC details if you are going to be sending an Automatic Email.
  - Fill in the Subject and the Content of Email. (A Subject is very important, as some virus checkers reject emails sent without subjects.)
- + You can send a "Mail Merged Email", which sends one email to many recipients as *individual* emails.
- To do this, use the Mail Merge facility, and select Emails rather than letters as the mail merge format. (See below for full details!)
  - There are two ways to send an email as follows:

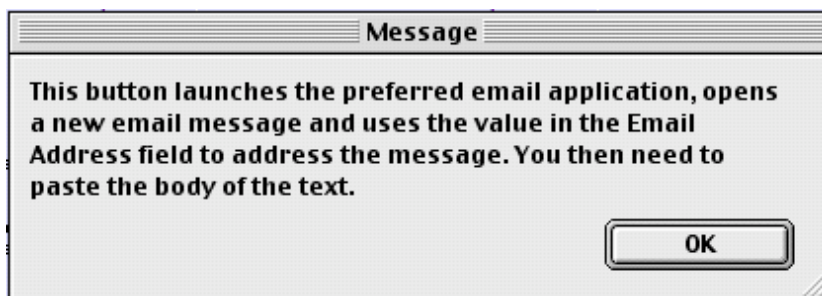
### **Send Auto Email**

- + 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. For some email programmes such as Entourage, use a carriage return instead of a semi-colon.
- + TAKE CARE! The Auto email facility does not allow your email software to use its stationery or signature options. It simply sends your text within a plain email with no headers, footers, signatures or disclaimers, (if you use them).
- + If you are interested in an HTML formatted email, please call Cruse Control to discuss.



### **Send Manual Email**

- The following describes when you should use the 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) and continue until you reach the dotted line.
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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.
  - If you make the Phone Call 'Pending' (on the New Activity screen at the start), it will appear in your Schedule.
  - If you wish to schedule the Phone Call for a later date (e.g. the person is out when you call), simply change the date in the Action Due Date field in

the top right of the screen. Click Return or Tab to confirm. The call will now appear on your Diary for the new date.

### **11. Make a File Note**

- Follow the instructions on 7. Create a letter, but select File Note as the correspondence type, and continue until you reach the dotted line.  
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- You will then be presented with the File Note screen.
- Type your file note into the 'Activity Content' box.
- Click on 'Contacts' to go back to the Contacts file.

### **12. Log an appointment**

- Follow the instructions on 7. Create a letter but select Appointment as the correspondence type, and continue until you reach the dotted line.  
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- Choose 'Pending' before pressing 'Continue'.
- You will then be presented with the Appointment screen.
- Type your Appointment details into the 'Activity Content' box.
- On the right hand side of the screen, fill in the 'Action Due Date' box. Make sure your date is in the format dd/mm/2003.
- Then fill in the 'Action Due Time' from the drop down menu.
- You can export this appointment to a Palm PDA if you wish, by choosing the 'Export for Palm' button. (This will save a file onto your hard disk, which you can then easily import into your Palm.)
- You can also Tag an appointment by clicking on the 'Tag' field.
- Click on 'Contacts' to go back to the Contacts file.

### **13. Move Pending Activities**

- You may find that on a daily basis you are not able to keep up with your Pending activities, and wish to move them forward to another date.
- Go into any appointment or phone call via Pending Activities.
- Click on the 'Move Pending Activities' button.
- You will be prompted to choose either 1 day, 3 days, 1 week, or 2 weeks.
- Click on the time scale required.
- All of your Pending activities that have not been actioned will then be moved forward, and appear in your Schedule on the newly specified date.

### **14. Create a Mail Merge to Letters**

+ 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 the 'Mail Merge' button.
- You will then be asked to input the search criteria for your Mail Merge. For example, tick the 'finance' box in the contacts details to find all finance companies, or type Hampshire in the County box to find all contacts in

Hampshire. You can search for a combination too: doing both the above on the same screen would find you all finance companies in Hampshire!

- Click 'Continue' in the left FileMaker column.
- 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 number of records 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 of records, press 'Continue Mail Merge'.
- -----
- You will then be asked to type in your letter, or you can choose one of the Standard Letters and paste this (just as you would for a normal letter).
- You must also enter a title for your Mail Merge.
- When you are happy with the content of the letter, you then continue the Mail Merge by pressing the 'Merge to **Letters**' button on the top CONTACTS! button bar. One letter will be created for each contact you have selected in the contacts file (the records you found before).
- You will then be shown a Preview of each letter that you can scan through using the 'rolodex' on the top left of the lefthand FileMaker column. Click on the bottom 'card' to move forwards through the records, the top 'card' to go backwards. This way you can see how *all* your letters will look when printed, not just the first one!
- When you are happy with these, press 'Continue' in the left FileMaker column.
- Check the Page Setup and Print options, and print your letters.
- Your letters will now appear in the Activity list under the Archive tab in the Contacts file.

#### **15. Create a Mail Merge to Emails**

- Follow the instructions as outlined in 12. above and continue until you get to the dotted line.
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- 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.
- Then enter a title for your Mail Merge, which should include the word Email in it.
- Type in a Subject. (A Subject is very important, as some virus checkers reject emails sent without subjects.)
- You can automatically paste in your own signature if you wish by clicking 'Input Auto Signature'. This will paste in your Job Title, Direct Line, etc, as shown in the Staff File.
- When you are happy with the content of the Email, press the 'Merge to **Emails**' button, and one email will be created for *each* contact you have selected in the contacts file (your set of found records).

- One by one, these will be put into the **Drafts** folder of your Email software (Outlook, Entourage etc).
  - **IMPORTANT:** emails will only be sent if they appear in the OUT BOX of your email programme! CONTACTS! places them in the Drafts folder just in case, so you can double-check before sending. To send these emails, open the Drafts folder, select ALL the emails, and drag them into your OUT BOX. Once in the OUT BOX, they will be sent next time your email programme checks and sends mail.
  - Your Emails will now appear in the Activity list under the 'Archive' tab on the Contacts file.
- + If you are on a Mac and use Mail, the programme will open each email placed in the Drafts folder in a new window.

### **16. How to send attachments with Email merges**

- Create an email merge as normal (see above).
- When the mail is in the Drafts folder, go through each message one by one and attach the appropriate attachments.
- Using this method, you can attach as many files as you like to any email.

OR

+ CONTACTS! can automatically attach them for you. TAKE CARE! This will only allow one attachment per email, and *all* emails in the Email Merge will have to have the same attachment.

- Go to the Activity screen (via any activity on any contact record).
- In the FileMaker drop down menus at the top, go to 'Scripts' and choose the top entry, 'Scriptmaker'.
- Double click the script called "auto email button".
- Select the "Send Mail" line.
- Click on 'Specify' (bottom right).
- At the bottom of the screen, there is an 'Attach' button.
- Click the box, and a tick should appear.
- Press 'Specify' and search your hard drive to find the attachment you require.
- Click 'Open'.
- And then 'OK'.
- And then 'OK' again.
- And then 'Done'.
- You should now be out of Scriptmaker.
- Now when you next send an email it will pick up the attachment automatically.
- **Remember to remove the attachment in the script once you have finished your email merge** – otherwise next time you send an email it will pick up the same attachment!

### **17. 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 by clicking the 'Find Record' CONTACTS! button, and entering your

search criteria on the screen. Then click 'Continue' in the left FileMaker column.

- Click on 'List View'.
- Click on 'Print Menu'.
- Choose which labels you wish to use.
- Check 'Page Set-Up' for the right size of sheet of labels (usually A4).
- Check 'Print' screen for your printer details, and press 'Print' to print your labels.
- You will be returned to the 'List View'.
- To exit, click 'View' next to any of the contacts to return to that contacts record screen.

### **18. 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 envelopes by clicking the 'Find Record' CONTACTS! button, and entering your search criteria on the screen. Then click 'Continue' in the left FileMaker column.
- Click on 'List View'.
- Click on 'Print Menu'.
- Choose 'DL Envelope'.
- Check 'Page Set-Up'.
- Check 'Print' screen for your printer details, and press 'Print' to print your envelopes.
- You will be returned to the 'List View'.
- To exit, click 'View' next to any of the contacts to return to that contacts record screen.

### **19. 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 as required.
- + TAKE CARE! Do not 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.
- + You can also amend Schedule categories on this screen. (See Schedule (Diary) instructions below for restrictions).
- Click on 'Contacts' to get back to the contacts file, and your new values will appear on the Details screen.

### **20. 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 the carriage return (Return) at the end of the list to add another value. Type in your new value.

- Then click 'Done'.
- The next time you use the list, it will contain the new value you have just added.

#### **21. Find a previous correspondence**

- To find a letter / email/ fax/ file note or phone call for a particular contact, simply go to the Activity tab on that contact's record, 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. This will take you to the Activity file, where you can re-read or even re-print the correspondence.

#### **22. Find all staff within a company**

- Go to the Companies file.
- Find the company you are interested in, using the 'Find Record' button.
- You will be able to see all the staff under the Contacts tab.
- Click on the 'View' button on the left of the name, and this will take you through to the Contacts file.
- Alternatively, go to the Contacts file (using the 'Contacts' button).
- Search for the Company name using the 'Find Record' button.
- Go to 'List View'.
- You will then get a list, which you can print out using the 'Print Report' button. (You can name the Report for future reference if required.)

#### **23. 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.
- CONTACTS! will allocate each letter a unique reference number.
- This will now be available whenever you create a letter, fax or mail merge. Note that the list of Standard Letters is sorted alphabetically.

#### **24. Fill in the Set-up screen**

- Go to main Menu.
- Click on the 'Set-Up' button.
- Follow the on-screen instructions.
- You can enter your company details and even insert a logo as required.

#### **25. Find various 'lists' of contacts and print them**

- Click 'Find record' in the Contacts file.
- Enter your find criteria. (See 32. 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, (e.g. all contacts who are in London, *plus* all contacts who are in Middlesex), put both sets of criteria on one screen. 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). This adds an extra layer (e.g. *and* all those who are financial companies).

- When you have entered all your search criteria, press the 'Find' button on the left FileMaker column.
- When you have your found set, click the 'List View' button 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, if required.
- You can also sort this list before printing it by pressing the 'Sort' button.

## **26. Turn off all 'Mail To' boxes**

+ The 'Mail To' feature allows you to choose a set of contacts to mail to that you probably need only once. (E.g. contacts who are coming to a special one-off dinner and are vegetarian.) You select them by browsing your Contacts list and checking the 'Mail To' box on those you wish to contact for this one-off mailing. Then you can do a Find based on this 'Mail to' box.

+ Once you have done this one-off mailing:

- Go to 'List View' in the 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

## **27. Schedule (Diary)**

+ CONTACTS! has a fully featured Schedule system that works just like a diary. It lists your pending activities, whether they be meetings, appointments, phone calls, etc. You can view your own Schedule for a day, a week, or a month at a view.

+ Just as importantly, you can also see the same details for any of your colleagues, either individually or together on one page.

- 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 the 'Schedule' button anywhere that it is found on the system. Providing you have followed the instructions for setting up the Staff File correctly (see Installation) prior to entering the appointment, it will appear in the appropriate person's Schedule.
- When an appointment or phone call has been actioned, you will 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. There is also a 'Week by Day' view, which shows all activity by **all** staff, and a 'Month by Day' view, again across **all** staff. This can be printed easily onto an A4 page.
- Click the 'Staff' button to select and view the diaries of other staff individually.

## **28. Week View and Month View in Schedule**

- To make an entry in the Activity file AUTOMATICALLY appear in the 'Week' and 'Month' views of the Schedule, you must use one of the following words in the ACTIVITY TYPE field: "Holiday"; "Appointment"; "Meeting"; "Leave". You can use other words as well as the words listed,

as long as the words listed appear i.e. you can say “Annual Leave”, because the word “Leave” is included.

- If you want to add an appointment to the ‘Week’ and ‘Month’ views, but it does not contain any of the above words, simply check the box ‘Show in Month View’ on the right hand side of the screen.
- + Best practice on the use of the Schedule is to only click the ‘Show in Month View’ on activities colleagues need to know about, such as meetings, out of office appointments, or that Caribbean holiday! Otherwise you can clutter the diary with your personal day to day activities and tasks, which are better suited to your own Action List or Schedule.

### **29. Create web links**

- + You can create many links from a company to its corresponding web sites.
- Any links you add to a web site for a company will automatically be visible under the ‘Links’ tab in the contacts files of all the Contacts within that company.
  - A web link can be added either under the ‘Links’ tab on the Contact file, or in the ‘Contacts’ screen of the Companies file.
  - You do not need to enter the http:// portion of the web address, as this is automatically entered for you.
  - Simply type in, or copy and paste in, the web address on to the next available blank line.
  - Press the ‘Go’ button and you will be connected to the web site (providing your machine has internet access!).
  - To delete a link, click the ‘X’ at the right hand end of the link box.

### **30. Link files from other applications to a Contact record**

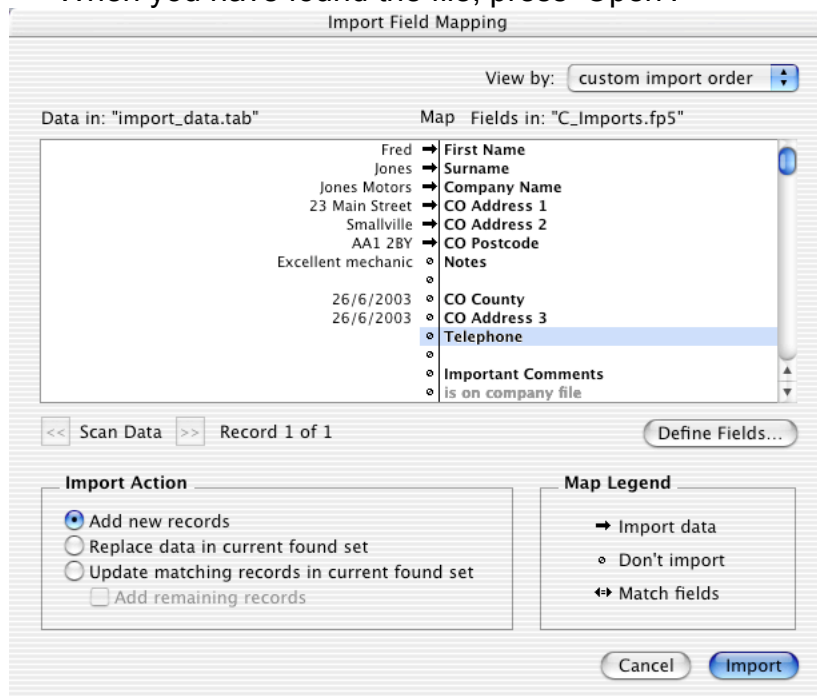
- + CONTACTS! can link any other documents, such as Excel spreadsheets, Word files, presentations, etc, to any contact’s record.
- Go to the ‘Links’ tab in the Contact file. This is the same tab you would go to to add a web link (see 29. above).
  - Find the Contact record that you wish to add a link to, using the ‘Find Record’ button.
  - Press the ‘New Link’ button and you will be given a window where you can search for your file that you wish to link to.
  - Select the file (click on it) and then press ‘Choose’. The full instructions (path) for where CONTACTS! can locate the file will automatically paste itself into the box.
  - To open the file link, simply click the ‘Open’ button next to the file you wish to open. The file will open in the programme it was created in, inside a new window ON TOP of FileMaker, so the CONTACTS! screen will be hidden below. (This is of course assuming that you have the original programme the file was created in.)
  - TAKE CARE! For example, if the link is to an Excel file, you will now be in Excel, viewing that *original* file not a copy! You should Close or Quit the viewed file window to see CONTACTS! again.
  - If you wish to delete a link, press the ‘X’ on the line you wish to delete.
  - If you move a file from its original place on the hard drive or server where you originally linked it to, CONTACTS! will not be able to find it. You will

therefore need to delete the original link, and set up a new link to the file's new location.

### 31. Import from other databases and/or excel spreadsheets

+ You may have information from other databases that you wish to import into CONTACTS! The most common way of exporting data from your other systems and bringing it into CONTACTS! is to export it as "Comma Separated" or "Tab Separated" files.

- Once you have a comma or tab separated file, you can click on 'Set Up' from the main Menu.
- Then click on 'Import Data'.
- There is another button on the import window, also called 'Import Data'.
- Press this button.
- It will prompt you to search for the comma or tab separated file.
- When you have found the file, press 'Open'.

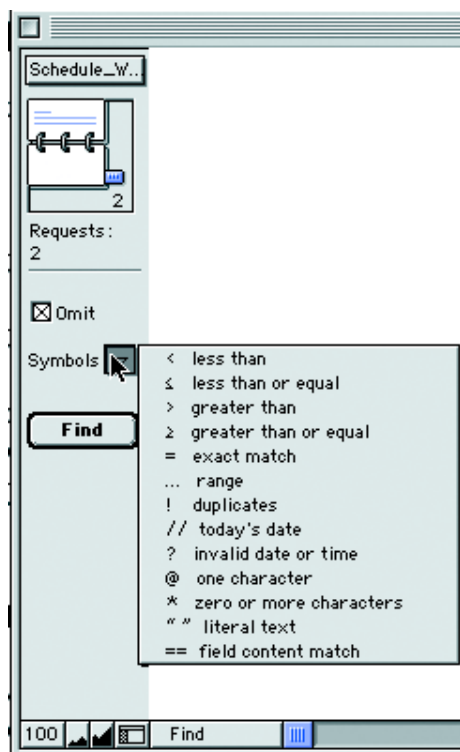


- On the left hand side of the screen will be a list of all the fields you are importing.
- On the right hand side of the screen is a list of the fields you are bringing your data into.
- Move any fields up and down on the right to line up with fields on the left. Make sure that the "Map" arrow is switched on between any that are being imported. (E.g. Telephone number -> Telephone.) Any that are not being imported should show a circle in between.
- Check that the import action says "Add New Records".
- When you are happy that the fields on the left are importing into the correct fields on the right, press 'Import' on the bottom right.
- This will bring all the records into the import tool.
- Some of the lines may have "Print Duplicates" written on them. This is because it will have found what it believes to be a match with the data already on CONTACTS!

- You are advised to print these out **first** (by pressing the 'Print Duplicates' button), and manually cross-check them with your database.
- Any duplicates will not be imported.
- Then press the 'Process Updates' button, and the system will automatically import the Companies and Contact details into CONTACTS!
- TAKE CARE! All records should now show as duplicates.
- Now press the 'Delete All Records' button to clear the file, ready for the next time you wish to do an import.

### 32. 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 left FileMaker column when in Find mode.



+ The list of symbols above only appear when you are in Find mode.

The first 4 are quite self explanatory, and are commonly used with numbers. They can also be used with dates and times, e.g. to find "all entries to the database since 1st March 2003", the search would be >1/03/2003. Or, to find all invoices for over £3000, the Find would be:

**Number Field**

Exact match = (equals sign), find exactly the word that you type, with or without other words in that field, e.g. =Dave will find you Dave Jones as well as Dave Smith.

Field Content Match ==(two equals) finds only the data you specify, without any other words, e.g. ==Dave will find you Dave but not Dave Smith or Dave Jones.

Range ... (three full stops) will find you data between a set of criteria, commonly used for dates or for numbers, e.g. 200...3000 in a "total spent" field could find people who have purchased between £200 and £3000 worth of goods.

**Date Field**

Duplicates ! (exclamation mark) will literally find any of the same fields that have exactly the same data.

Today's Date // will find you, for example, anything entered on the database today.

Invalid date or time ? (question mark). If the database has data in a date or time field that is not valid, it puts in a question mark. You can find all invalid dates and times by searching using the question mark.

One Character @. Searching for Kev@n will find you Kevin and Kevan.

Asterisk \* finds Zero or more unknown characters. When searching for someone whose name you've heard as John, your search could be jo\*n and the database would find you Jon, Jonathan and John.

Literal text " ". If you are looking for an email address, for example, you would probably need to put it in speech marks. This ensures the database looks for the Exact Text match, e.g. "helen@crusecontrol.com". The same search without the speech marks will give you an incorrect result as it will use the @ symbol to mean "one character".

**Text Field**

### **Further Information**

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

### **FileMaker Manuals**

You may find it helpful to purchase a manual for FileMaker. If you did not purchase one at the point of buying CONTACTS!, you can do so at any time by contacting Cruse Control, [contacts@crusecontrol.com](mailto:contacts@crusecontrol.com), or calling 01923 842 295.

### Files in the CONTACTS! Database

The files contained in the solution are as follows:

xx_activity.fp5	Keeps details of all Letters, Faxes, Emails, Phone Calls and File Notes for each contact. Also logs all Mail Merges here too.
xx_category.fp5	List of all main marketing categories (do not need to view this file – data is entered into it from the main Contacts screen)
xx_companies.fp5	Names, addresses phone, fax and web addresses of companies, along with an easy-view facility of all staff associated to each company. Automatically duplicate-checks any additions to the database.
xx_contacts.fp5	<ul style="list-style-type: none"> <li>• Names of all contacts, along with direct line, mobile, fax and email details.</li> <li>• Categories (which can be specified by the user),</li> <li>• Contact origination details (to help you monitor the effectiveness of Adverts, mailshots etc – this list is editable, by pressing 'edit...' at the bottom of the list.</li> <li>• First contact date</li> <li>• Action list button (to create list of who you need to call)</li> <li>• Name of main project manager etc who is responsible for the contact</li> <li>• Activity tab, which allows you to generate and see all Letters, Emails, faxes, log phone call details and make file notes. This area is also used for mail merge creation</li> <li>• Check box for inclusion of contact in Christmas Card list</li> <li>• Check box for ad-hoc mailing (which can be switched off when required) Very useful if there is no real logic to the group of people you need to select for a particular mailing, you can just select an ad-hoc list using this button, and then turn them all off again.</li> <li>• Create Avery 7162 and 7165 labels and print DL envelopes</li> <li>• Create and print lists of contacts</li> <li>• Automatically duplicate-checks any additions to the database.</li> <li>• Log contacts status (active or inactive – or edit the list to add your own status)</li> <li>• Keep important comments on the front screen and also keep any general notes on the Notes tab.</li> </ul>
xx_market.fp5	Stores all category information for the check boxes

	on the details screen of both the Contacts and Companies files
<b>xx_MENU.fp5</b>	Main menu file, Most screens have a button that allows you to come back to the main menu, so you need never get lost in the system. This is also the file that you open to start the database up.
xx_setup.fp5	Add details of your company address, company logo and phone, fax and email details here to carry across on to letterhead and fax headers in the activity file. Also adds company name to your sign-off if required in the Activity file. You do not put information in all fields in this file if you are going to customise your letter and fax layouts to fit your own pre-printed letterhead style.
xx_stdletters.fp5	Allows you to store standard letters ready for use when creating an activity. You can have areas within the letters that have XXX'x so that you can fill in any variable data at the time of creating a letter. This file is accessible from both the Activity file and directly from the main menu.
xx_users.fp5	This file is only accessible by Cruse Control creative services. It contains the number of licensed users that have been purchased. If you need to upgrade the number of users, this file needs to be sent back to Cruse Control at <a href="mailto:licensing@crusecontrol.com">licensing@crusecontrol.com</a> and we will amend the number of users accordingly.
xx_Staff.fp5	Contains the Schedule and all staff details. Also vital to enter the Auto Signature information for letters and emails.

**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). It also works with Entourage and Outlook, and OS X Mail software. If you require more advanced HTML functions please contact Cruse Control to discuss.

OSX: when using OSX, ensure that Entourage is **open** when sending emails from CONTACTS!

Cruse Control June 2003