CONTACTfile ProUser Notes
Including business tools

Date: 16/01/2015

Contents

Note that whilst the images may not appear exactly the same on-screen, the principles will remain as written here.

1. Introduction

1.1. CONTACTfile requirements

Congratulations! You have now joined the swelling ranks of **CONTACTfile** database users. You will find your new database easy to install, easy to use, and it won't be long before you will be wondering how you ever managed without it!

Your database can operate on a standalone PC, or run centrally on a computer network. You can also use CONTACTfile in the cloud if you wish. It runs within Microsoft Access (2003 or later) or Microsoft Access Runtime (supplied free if requested), and if it's on a network it can be used concurrently by many people. Note that the software requires, as a minimum, Windows 2000 operating systems and a screen resolution of 1024x768.

1.2. CONTACTfile family of contact databases

There are two main versions of CONTACTfile:

1. **CONTACTfile CRM** caters for anyone working from the office, and want to store mainly business contacts. It works equally well if you are working from home, and want to store mainly personal contacts.
2. If you want CONTACTfile to assist you in marketing, quoting or invoicing, then choose **CONTACTfile Pro**.

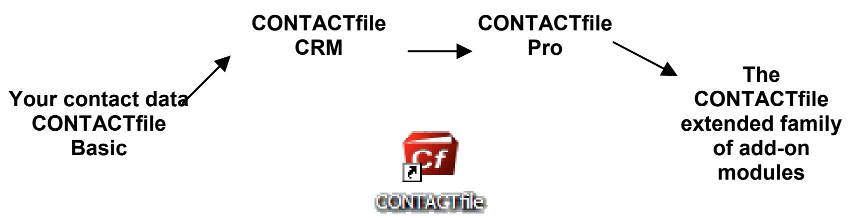
Also, if you are not using the cloud version, you may find the option to link with Office Outlook and Word templates particularly useful. Both versions of CONTACTfile carry out the following functions:

- Store details of your contacts; where they live and where they work.
- Flag each person according to type (whether they are part of the family, or your golf club, for example) and group them in unlimited ways.
- Construct focus groups – a collection of contacts who have something the same about them (such as the same postcode district)
- Produce label sets for each or all of them and/or alphabetical lists for you to keep by the phone.
- Automatically keep track of your communications.
- Export data to Excel, so it can be used (for example) with Word for mail merge.
- Construct a string of email addresses to send emails to groups of contacts.
- Send SMS text messages to one contact or a group of contacts.

Once you are established with CONTACTfile CRM or Pro, you may like to extend your use of the program by taking one or more of the CONTACTfile add-ons. These are:

- **HelpDesk**
- **Payslip**
- **Club**
- **Document Manager**

Any combination of these add-on modules is available in CONTACT*file*. Please see other manuals for the instructions for these.



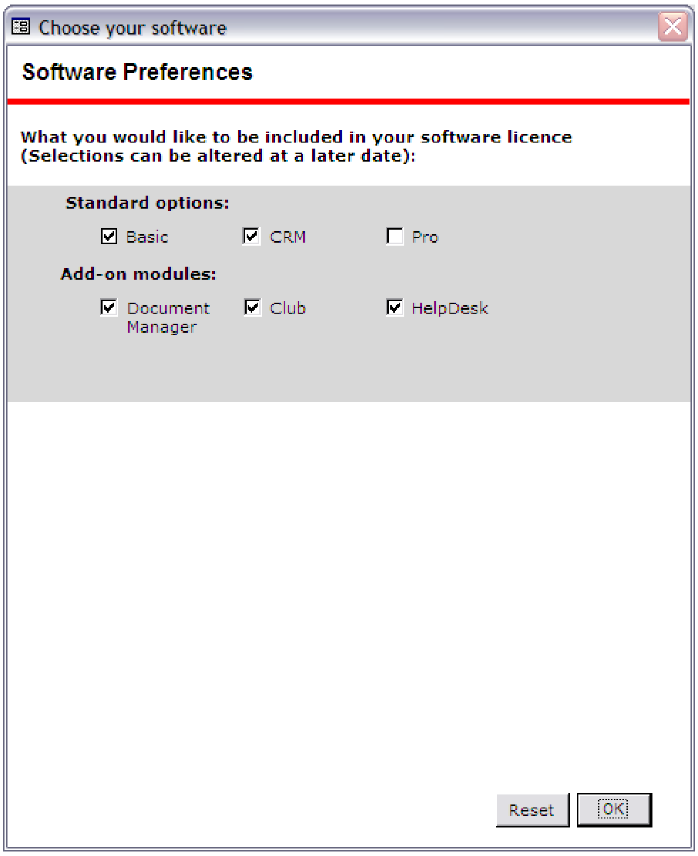
2. Getting Started

2.1. Starting up

The installation process (see appendix) will automatically create a shortcut on your desktop. Double-click this shortcut or, or use the Programs list, where 'CONTACTfile' will be listed as an option.

2.2. Choosing your add-on modules

The first time you use CONTACTfile, a dialog will be offered that will ask you to decide which modules you would like to try out. This decision can be changed at any time[1].



- CONTACTfile **CRM**, for organised and effective customer relationship management.
- CONTACTfile **Pro**, for marketing, pricing quotations, invoicing afterwards, and a tracker for managing the work you do.
- CONTACTfile **Document manager**, for keeping track of documents as they are constructed and revised.
- CONTACTfile **Club,** for running a club or society, and in particular for keeping track of membership payments.
- CONTACTfile **HelpDesk**, for ensuring that you manage your customer aftercare properly.
- CONTACTfile **Payslip**, for recording hours worked and generating payslips on a monthly basis.

Choose the add-on modules you require, as appropriate, and click OK. If unsure, just leave it with only the Basic and CRM option for now.

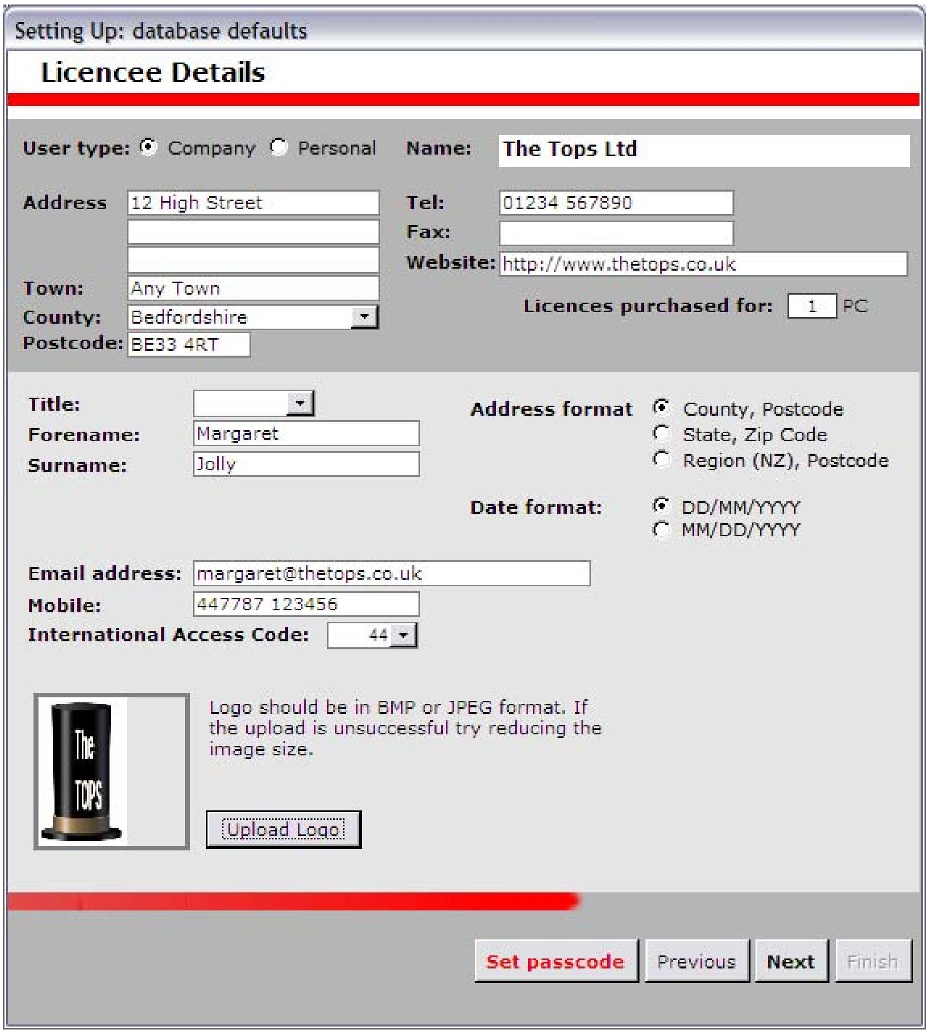
---

[1] If you change your mind within the initial 15-day trial period there will be no charging implications. If you change your mind after purchase, a new passcode will be required and a further payment may therefore be due.

2.3. Setting up

When using for the first time, the setting-up wizard will start automatically. Here you can enter general information about you and your organisation. Enter the name and other details as shown.

Step 1: About you and your organisation



Enter organisation name, taking care to type it with correct capitalisation, as this will be used for licensee registration later on. Enter your name, your address and telephone number and fill in the remaining fields appropriately.

If you wish to have your own logo on the main menu and on selected printouts:

- Prepare and save a bitmap image of your logo (*.BMP or *.JPG), which can be up to 80 pixels[2] or 2.4 cms square.
- Click **Upload.** Browse to where your logo image has been saved, select it, and click OK. Click OK again, and the logo will display in the box on the left.

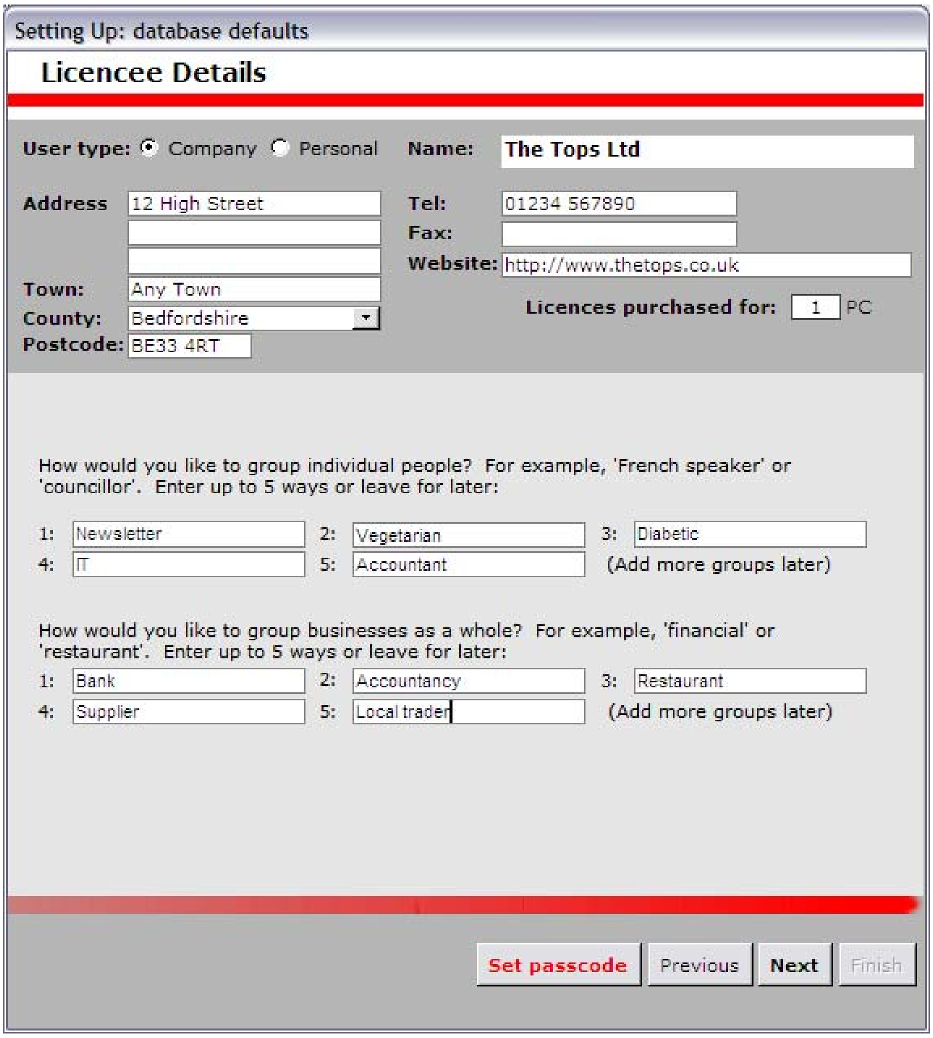
Click **Next** to go to Step 2:

---

[2] If the logo is larger than this, the bottom and right-hand edges will be cropped.

Step 2: Grouping

There are two main ways of grouping your contacts. The first is to categorise individual people, and the second is to categorise organisations as a whole. You need to be clear about this distinction, as it is often confused; a person can belong to the 'Accountant' group, whereas 'Accountancy' is a label you would apply to the business as a whole. A person working at an 'Accountancy' may or may not be an accountant.

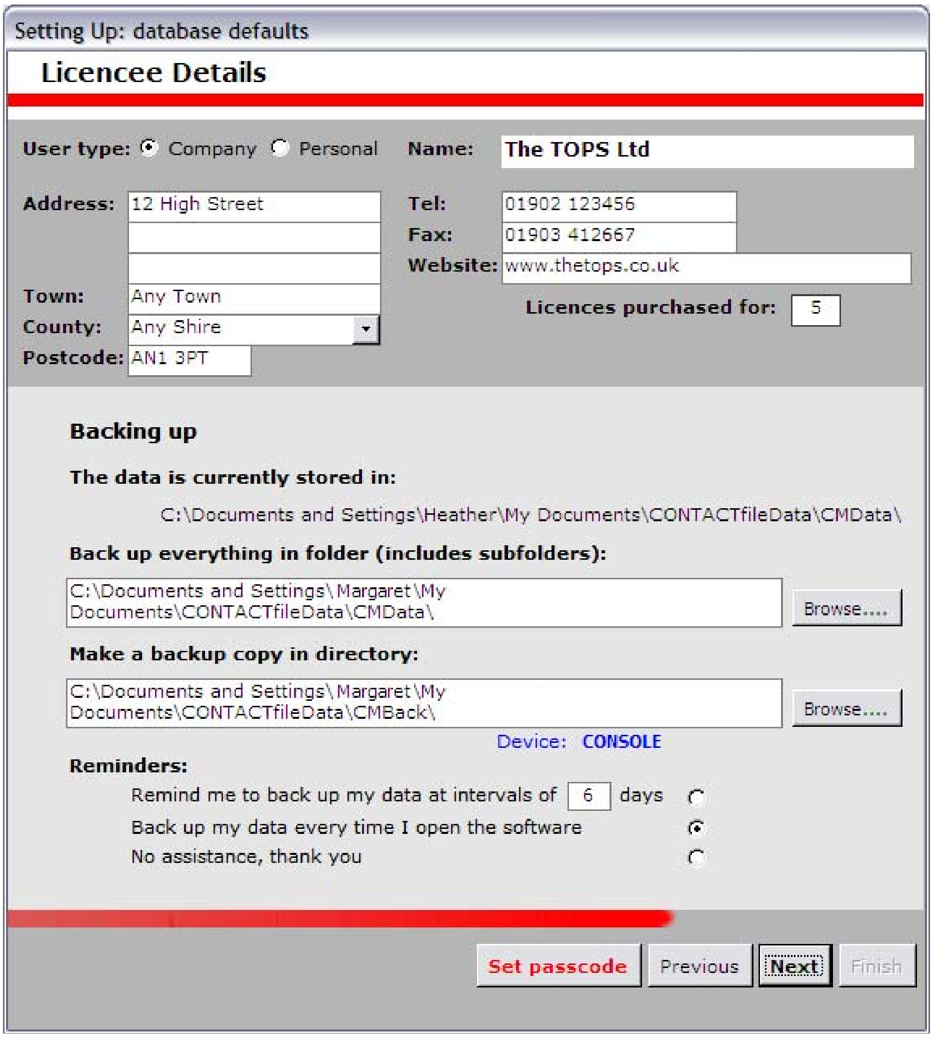


If you prefer to leave this until later, that's fine.

If you have chosen to take add-on modules, there may be many more steps to go through. The setting up for different add-on modules is covered in the appropriate section. Click **Next** to go to the last step.

Step 3: Backup

The wisest of us might forget to backup our data occasionally, but with CONTACTfile you can set the system to impose discipline (if you feel this would suit you). The system will tell you where your CONTACTfile data is currently stored, and will assume that this is what you need to copy. If this is not what you want, click the 'Browse…' button to change it.



The system may offer you a directory to copy to, but it is better to choose somewhere on a different drive if you can.

Finally, choose whether you would like to be reminded to carry out backups, and if so, how.

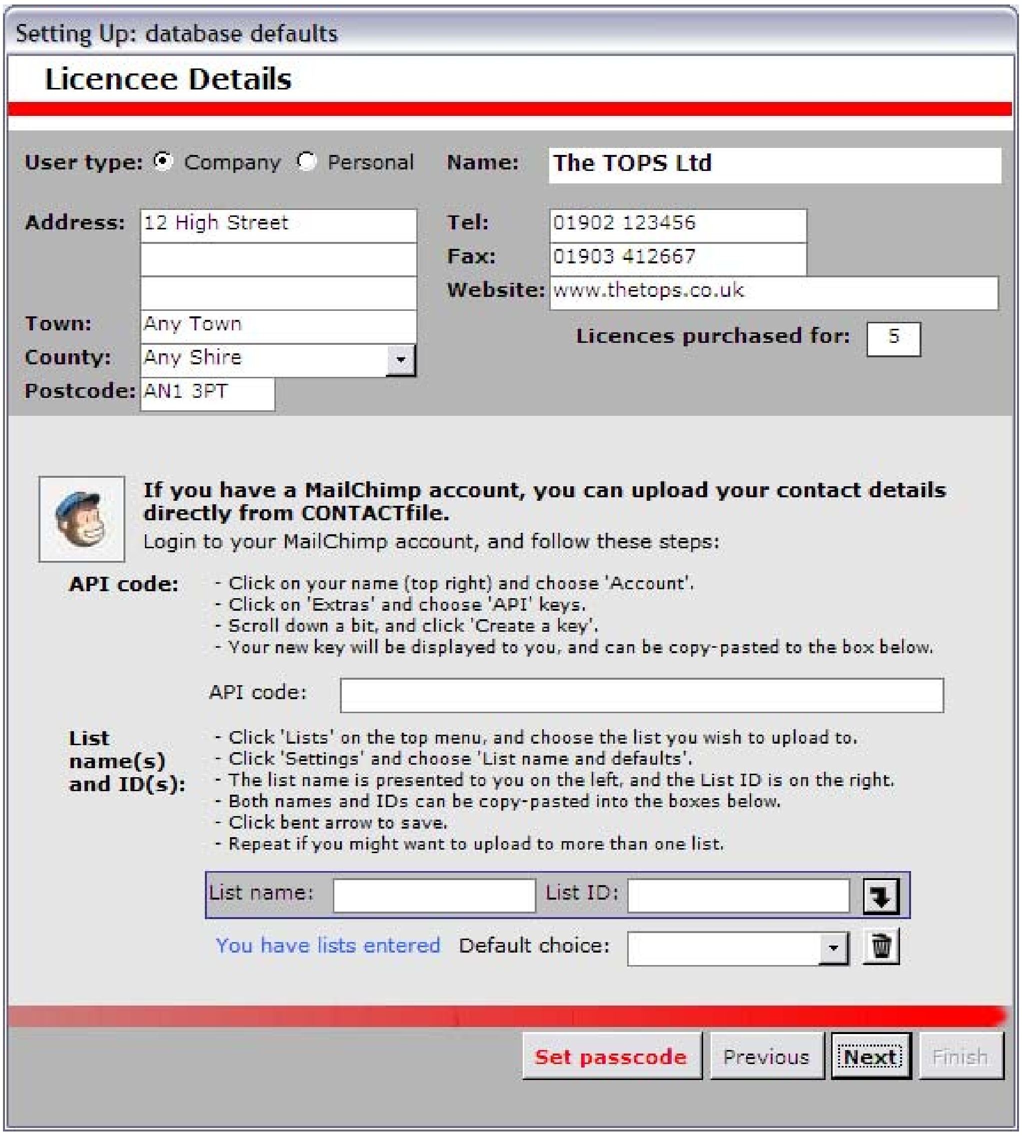
Step 4: If you are a MailChimp user

MailChimp is a web-based software package that helps you send emails in bulk. It will report back, too, so you know which of your recipients have opened your email, and who has been sufficiently interested to have clicked links. CONTACTfile allows you to send contact details to your MailChimp lists, individually or in bulk.

You will need to enter at least three things from your MailChimp account, each of which can be copy-pasted into the boxes presented.

1. Your API code –
2. The name of your MailChimp list
3. The code for your MailChimp list

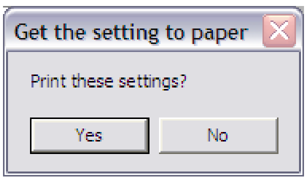
The instructions displayed on this section of the form will tell you how to get these three items of data. Click the bent arrow to save the list. Repeat the last two items if you have further lists. Click the dustbin button to remove all your lists; it is not possible to remove each list separately.



Final step: System settings

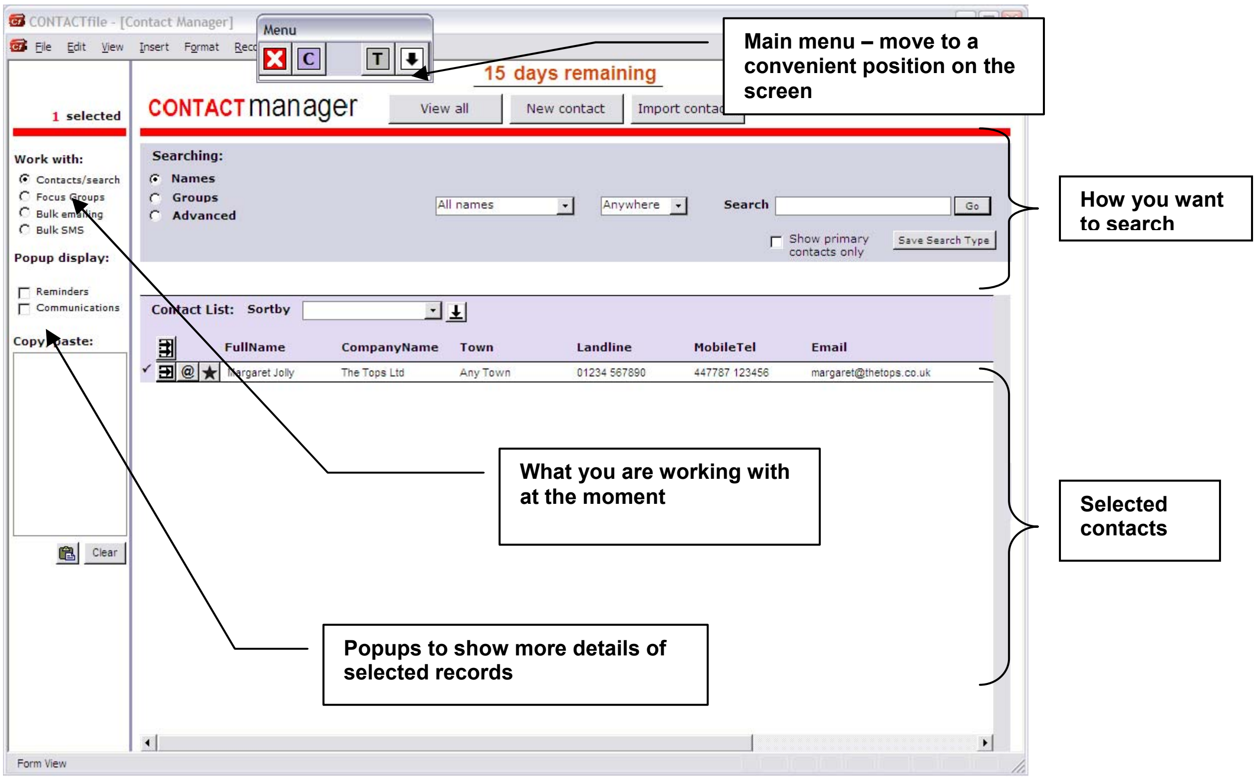
Change the main administrator if appropriate, and enter your SMS Name and password, if you have them[3]. Then, if you have arranged to have a website for searching your data, enter the website address and password. Finally, if you wish, change the default directories to locations more convenient to you.

When the setting up is complete, you will have an opportunity to send a report of these settings to the printer. Afterwards, the **Contact Manager** will be displayed, and you are ready to start!



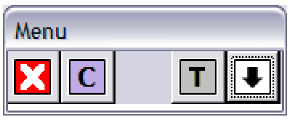
[3] An SMS Account can be arranged via your supplier.

The contact manager



See a later section for more detail on how the contact manager functions.

2.4. Main menu



The main menu hovers over the main screen, and can be moved to any position you like. It consists of five buttons, one of which will be hidden if you don't have any add-on modules.

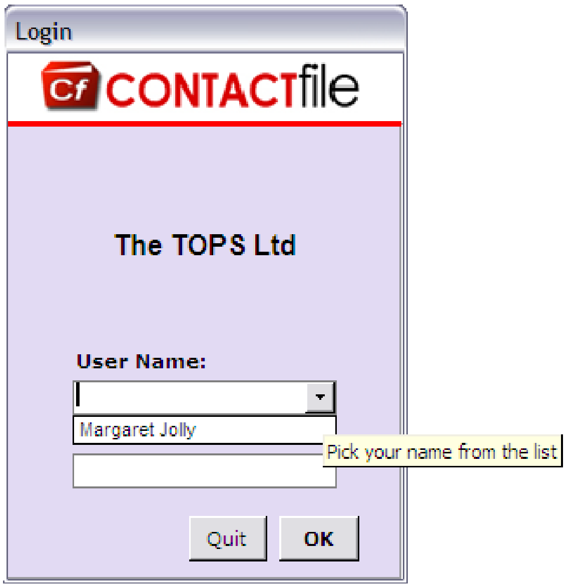
The five buttons are:

1. Close this form and return to the previous one, or (if you have the contact manager on display, as now) exit CONTACTfile. Try to get used to using this button instead of the similar one in the top right-hand corner.
2. Return to this contact manager.
3. Go to the project manager (only with add-on modules)
4. Show or hide the tools display. Tools are offered for customising, printing, and exporting data to Excel.
5. Down arrow to show the full menu options. When opened up, this is replaced with an up arrow which will restore the menu to its original size. Clicking on any of the picture buttons will display a different set of buttons in the central strip. When any of the buttons are chosen, the new display will be given and the menu will return to its reduced size automatically.

2.5. Logging on

When you used CONTACTfile for the first time, the login dialog was presented only briefly. But from now on, you will be asked for your name and password.

For this, you need to understand how to use combo boxes. Combo boxes are a way of offering a set of possible options. Here, we have a combo box for entering the User Name.



With combo boxes (until you get more used to the software) always click this downward-pointing arrow first, and the set of options will display. Normally you wouldn't type anything in the box, but if you have a long list of options and want to find one of them quickly, you could type the first few letters.

Select your name from this list, and type your password. The password will be the first three letters of your forename until you change it. Click OK, and the program will open.

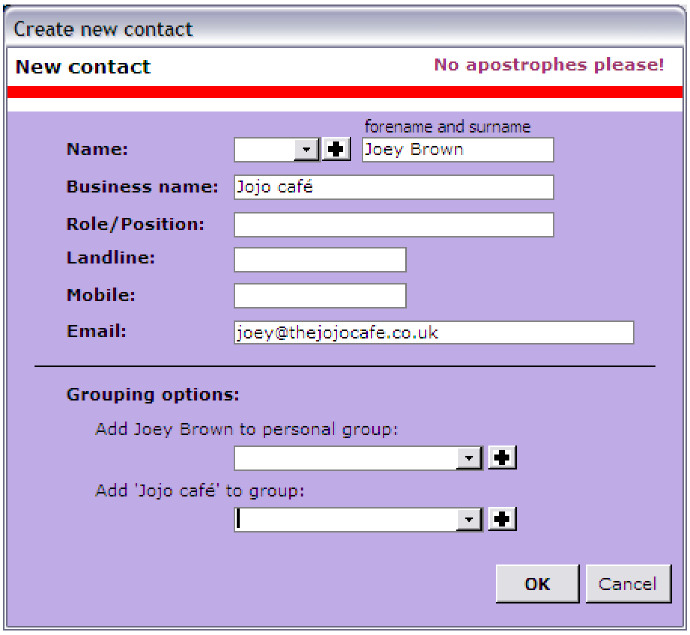
3. Entering, Editing and Deleting Contact Records

You will be in contact with people as private individuals or through an organisation, or both. These can be entered into the database one by one or via bulk import.

CONTACTfile differentiates between home and work addresses, and everyone on the database can have both, as well as an address for their bank. Organisations[4] can have a different address for sending invoices.

3.1. Entering a new contact

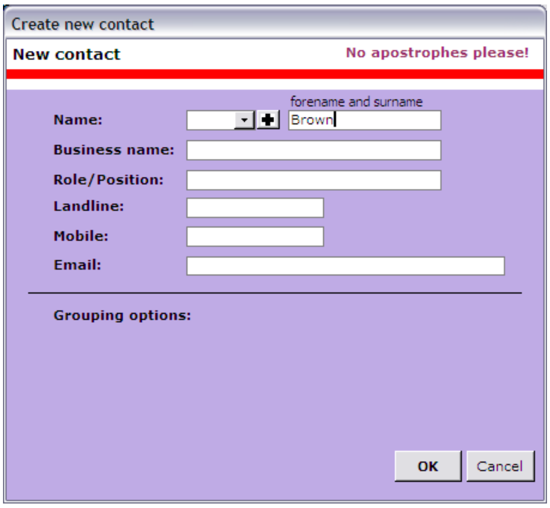
The **New Contact** button, at the centre-top of the Contact Manager, is used whenever you have details for a contact who is not already in the database. Click this button, and a dialog will invite you to enter outline details of your new contact. There is no need to fill in them all, but be aware that if you fail to type in a Business name, CONTACTfile will assume that the address is a private one and not an organisation. Click OK, and the full contact form will be presented (see below).



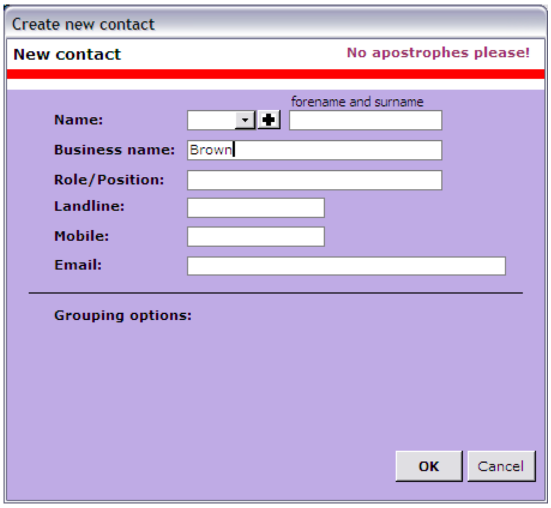
As your database grows, you will want to be sure that the person (or their organisation) isn't already listed before you go any further.

If you're at all unsure, start off by typing letters of their name, or of the organisation name, into the search box on contact manager. Press [enter] on the keyboard, or click **Go**, and allow the search to take place. If there are no records found, the computer will offer you two more buttons, one where your typing is assumed to be part of someone's name, and another where the typing is assumed to be the business name.

[4] Throughout these instructions the terms 'homes' and 'organisations' are used, but you can refer to them in any way you wish. See section on custom labelling.

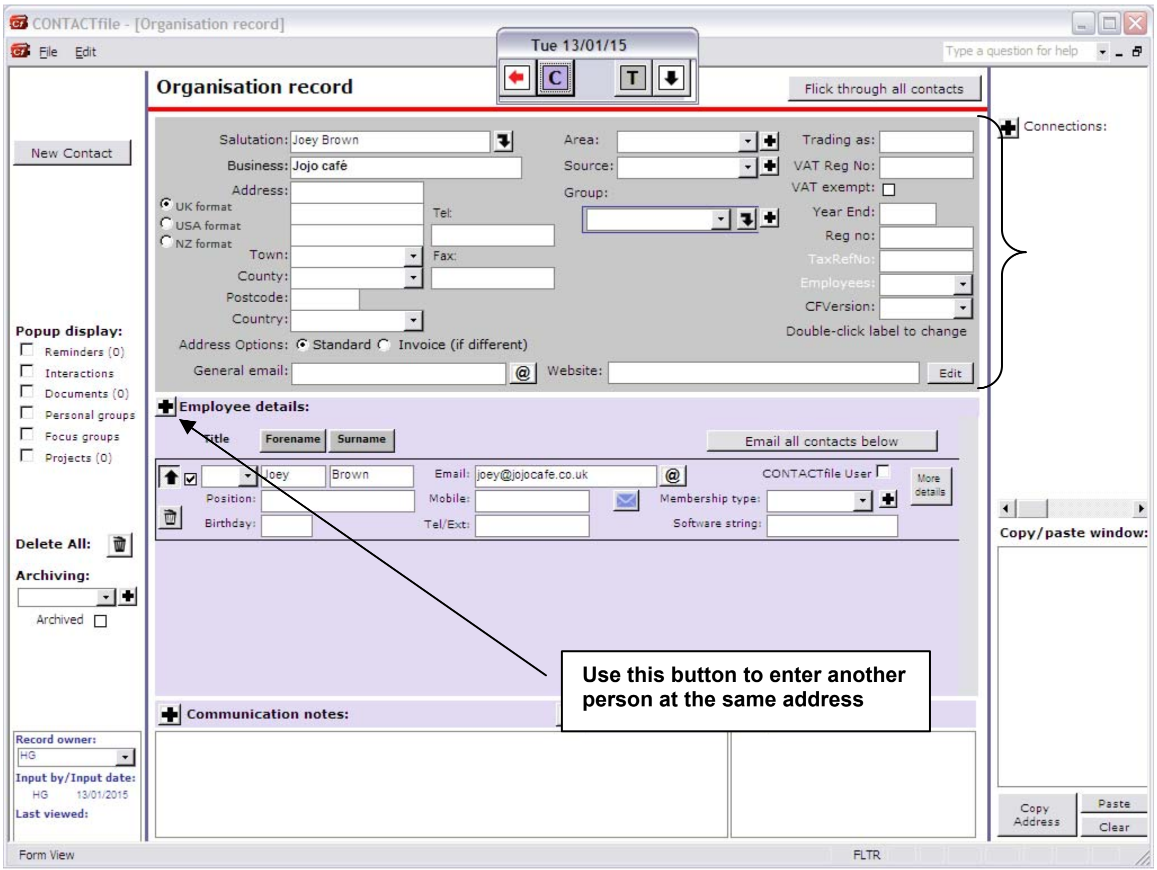


Clicking 'new contact'



Clicking 'New organisation'

When you click OK you'll be offered a contact form, ready populated with the details you have provided.

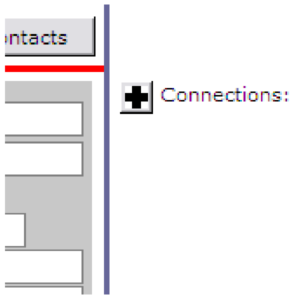


The top half of the contact form is about the home address or organisation, and everything entered here will apply to all the people who are living or working there. The bottom half of the screen is about individual people. More people can be added under the same address by clicking the + button.

Type the address, including the company name if appropriate. Finally, move to the list at the bottom and type in any other details, such as the person's email address and/or mobile number. The More details… button takes you to a page where many more fields relating to each person are available.

Sometimes you may be retrieving an address from an Internet web page, or from the top of a letter. In these circumstances, it is useful to be able to use the 'Copy/Paste' technique to transfer the data. A Copy/Paste window, which does not save anything permanently, but can be used whilst it is transferred to the correct field. [Ctrl] + [C] is to copy, [Ctrl] + [V] is to paste.

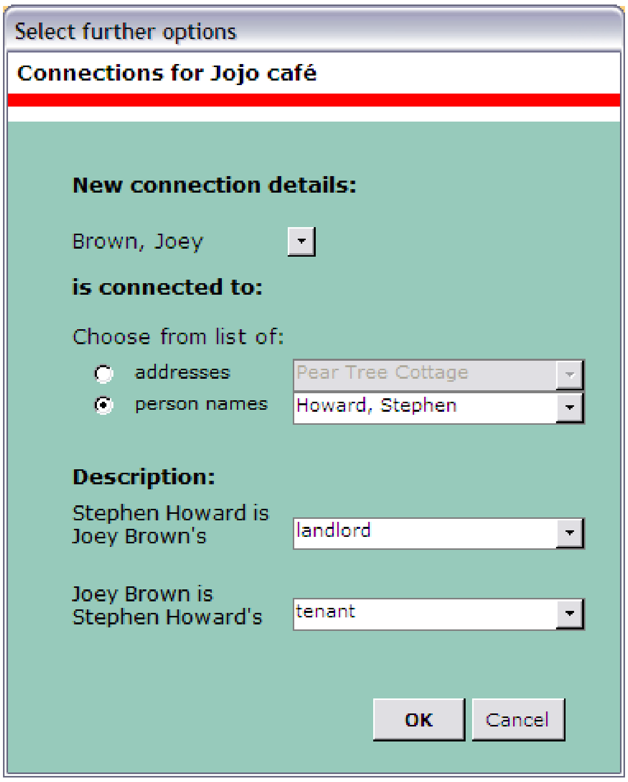
3.2. Connections and relationships



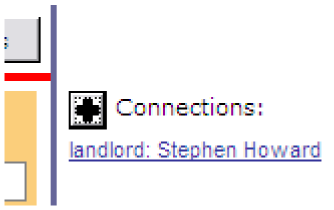
Sometimes, you may wish to connect one of your contacts with another - one contact may serve as an IT consultant to another, or might be a client of another. You can also record family relationships in this way – one contact might be the father of another.

To enter a connection or relationship, click the 'Add more connections to people at this address' button in the top right-hand panel. A dialog is presented, where you can define the nature of this connection.

Complete the dialog by choosing the person who is connected with the contact on display, and by typing in the nature of the relationship in both directions. Here, we have Stephen is Joey's landlord, and (consequently) Joey is Stephen's tenant.



Click OK when done, and you will be returned to the main screen, where the data you have just entered will be displayed.



A click on the connection entry (underlined) will take you to the record of the person who is connected, where the reverse relationship can be seen.

3.3. Groups

You will doubtless want to group your contacts, particularly if you are working primarily with organisations. There are two main ways in which you can group your contacts, which we have met already in the setting up process:

a. **Categories**, to group whole organisations or home addresses.
b. **Person types or skills**, to group individual people.

But we also have:

c. **Focus groups**, to collect people together for a purpose, usually temporary. See a later section for details on this.

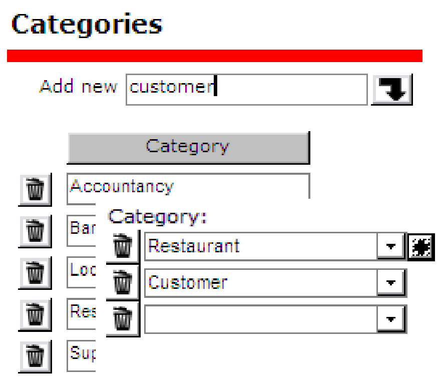
It is important that you apply the two main types of groupings correctly. Categories apply to the whole address, so if you have several people listed, they will all automatically belong to that category. For example, the term ‘Pet shop’ will provide a category for an organisation, because everyone listed as employees must work at the pet shop. Similarly, the term ‘semi-detached’ will provide a category for a home address, because everyone listed as living at that address will be living in a semi-detached house.

Categories

In the top half of the contact record, select the category you want from the dropdown. Click the bent down-arrow to add it to the list below. Repeat to add more categories.

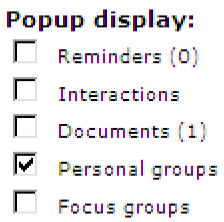
If you need more category types than you entered during the setup process, click the **+** button, and the list of categories will be displayed. Enter your new one in the box at the top, and click the best down arrow to add it to the list below.

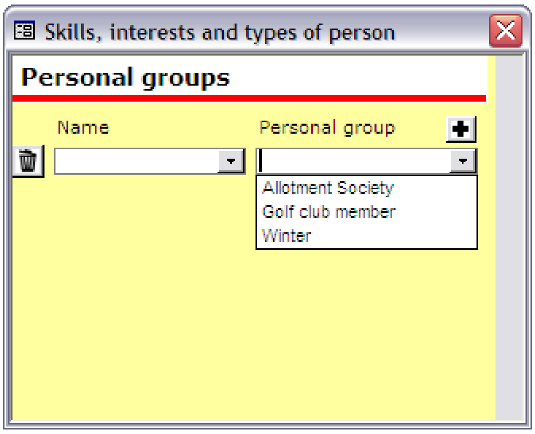
The new category will automatically be allocated to the address on display.



Personal groups

The **Personal groups…** button is in the left panel as one of the optional Popup displays. Put a tick in the box, and the skills or types popup is displayed.





Using one row per person grouping, select the person in question, and the skill interest or type they possess. The groups offered will be those you have entered previously, but if you want to add more at this stage, click the **+** button. Close the popup when done.

<ins>When adding more types, notice that a favourite type ‘Newsletter’ has been marked. This enables you to quickly add people to your favourite category, by clicking on the person’s record. See the section on Customising (part of the Pro module).</ins>

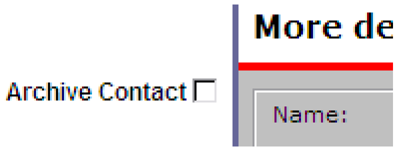
3.4. Archiving and deleting contact records

Archiving

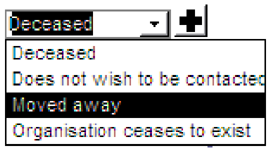
People and their addresses can be archived separately, but addresses cannot be archived unless all the people working or living there are also archived. Archiving a person results in the deletion of all reminders, their removal from campaigns and focus groups, and exclusion from all searches and exports.

When the using the database normally, only the 'active' (non-archived) addresses and people are on view. All non-active or archived addresses and people are hidden from view. An address should be archived if it ceases to exist or if no-one on the database lives there, or if it is of no concern to you. A person should be archived if they have expressed a wish to be no longer contacted by you.

To archive individual people, and leave the address un-archived (with everyone else who lives or works there also un-archived) put a tick in the archive box in the **More details** (see below) screen for that person.



To archive the address and everyone who lives or works there, put a choose the reason from the dropdown in the left panel. An address cannot be archived without the people being archived too.

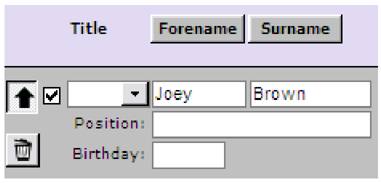


Deleting

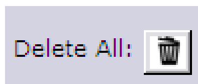
You are advised NOT to delete addresses or people unless you are sure it has ceased to be relevant. If the whole family or organisation moves to a completely new address, overtype the recorded address with the new one. If there is history, or if you think the person may be in touch in the future, it might be better to archive.

Two types of delete need to be considered here; do you want to delete the contact (person) or do you want to delete the whole address, with everyone who lives or works there?

To delete individual people, and leave the address intact (with everyone else who lives or works there) click the dustbin button against the person record.

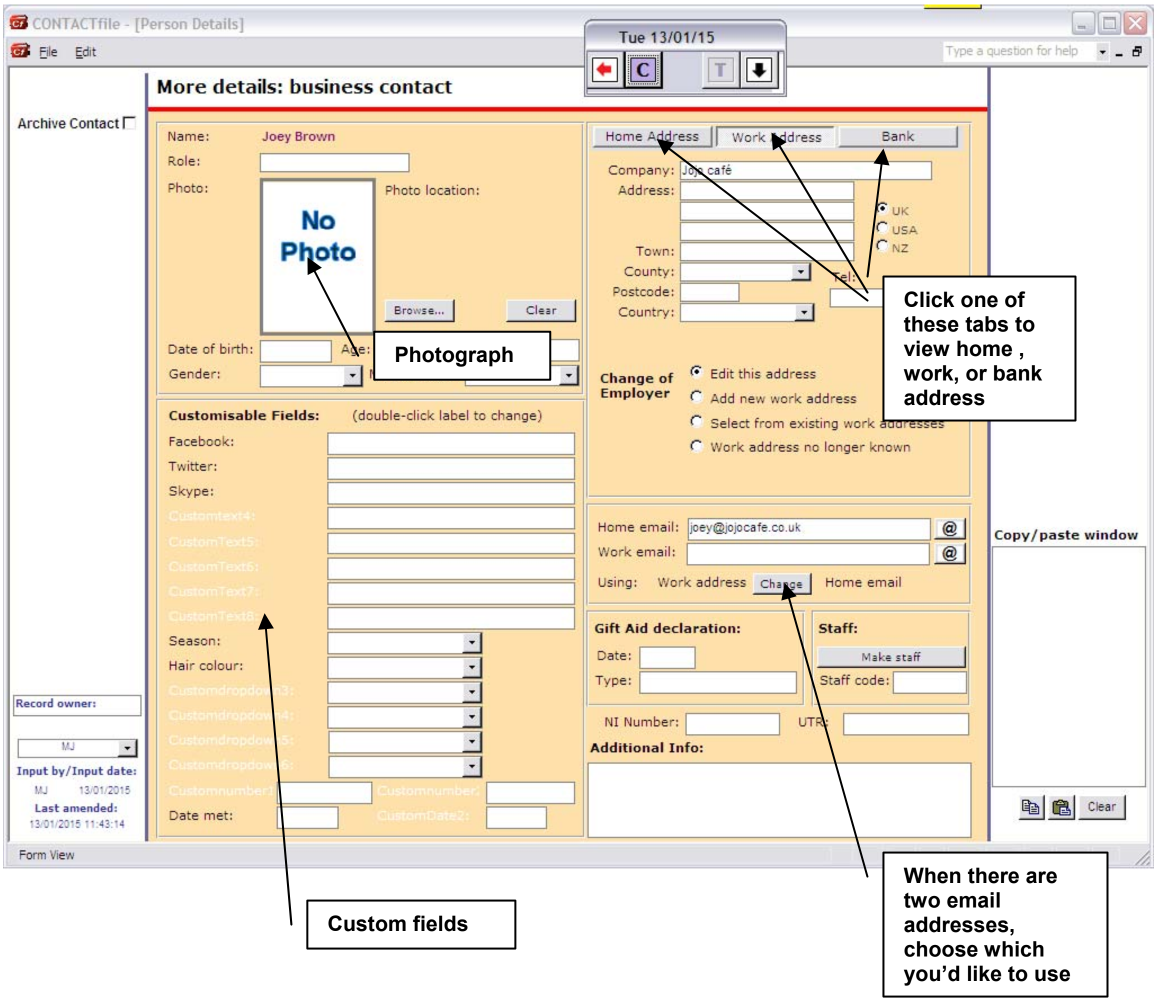


To delete the address and everyone who lives or works there, click the dustbin button against the address, at the top half of the contact screen.



3.5. More about each person

The **More Details...** button on the right edge of the person record takes you to the ‘Person Details’ form, where you can enter much more about each person.



Photographs

Photographs are not stored within the database structure, they are each stored in a separate file, in a directory of your choice, and the location of the file is saved instead. Your CMDocs directory within your CONTACTfileData directory[5] is the default, but this can be changed on the ‘Setting Up’ form. To insert a photograph, click the **Browse…** button, select the image file you require, and click **‘Save’**.

Date of birth

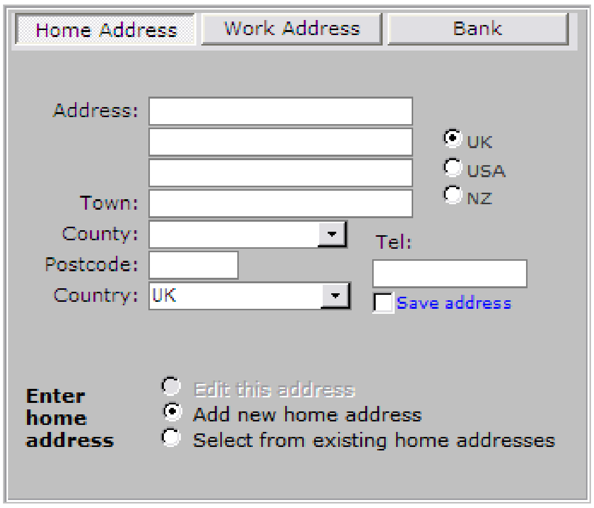
It is important to note that if you have entered the birthday on the main person record, the date of birth will carry the day and the month of birth, but not the year. The year will default to the current year (when the data was entered) and should be modified if possible.

---

[5] This is the default location of your program and data files, and can be found in your user area. The Setting Up form (viewable from the Set Database defaults section on the main menu) will show you what this is for your own computer.

Person's work/home address

Three addresses are allowed for each person, a home, a work and an address for their bank. If the first address entered is a home address, the work address can still be entered, and visa-versa. Click on the address you want, and edit as required. New addresses will be saved automatically.

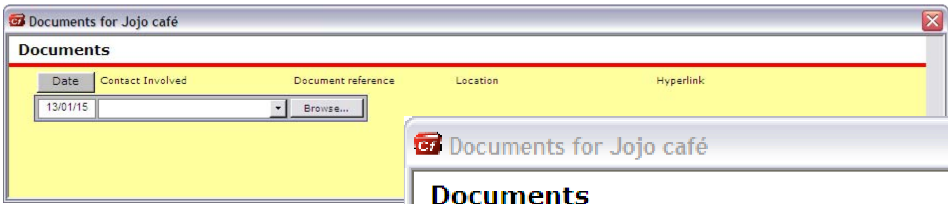


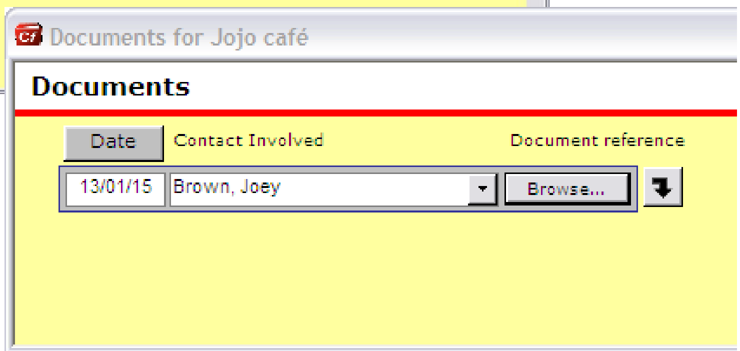
A change of employment or moving house

Editing the business (or home) address directly will result in everyone at that business (or home address) moving to the new address. If one moves from one job to another, the address needs to remain as it is for everyone else who is working (or living) there. But for this particular person you can choose to type a new address, or select from those already in the database. Select from the options at the top appropriately.

3.6. Documents

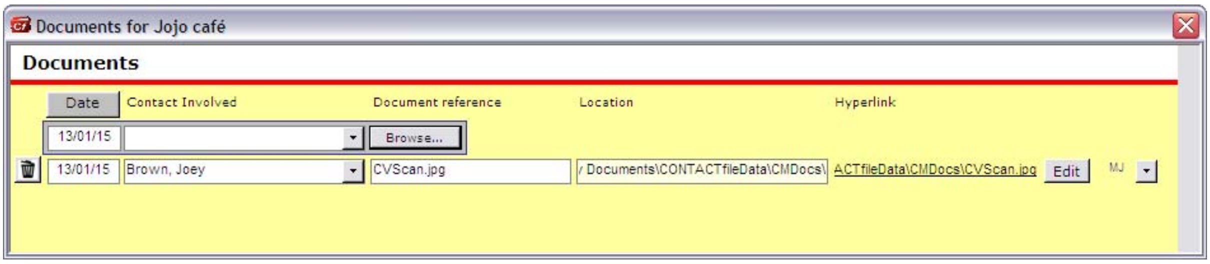
When dealing with people, other items of electronic material (documents, Excel files, web pages, emails) may be relevant to your records. For example, an employment agency may wish to attach a person's CV to their personal record. The facility to attach documents is provided using hyperlinks, and can be reached by clicking the Documents button in the left panel on either the Organisation or Home forms.





Initially, the popup will be blank except for a box waiting for you to choose the contact that the document relates to, and a browse button to select the document itself.

Once these have been entered, a bent down-arrow will be displayed. Click this to save the document link.



The document record, once saved, will consist of several items as shown. Click the underlined hyperlink to open it.

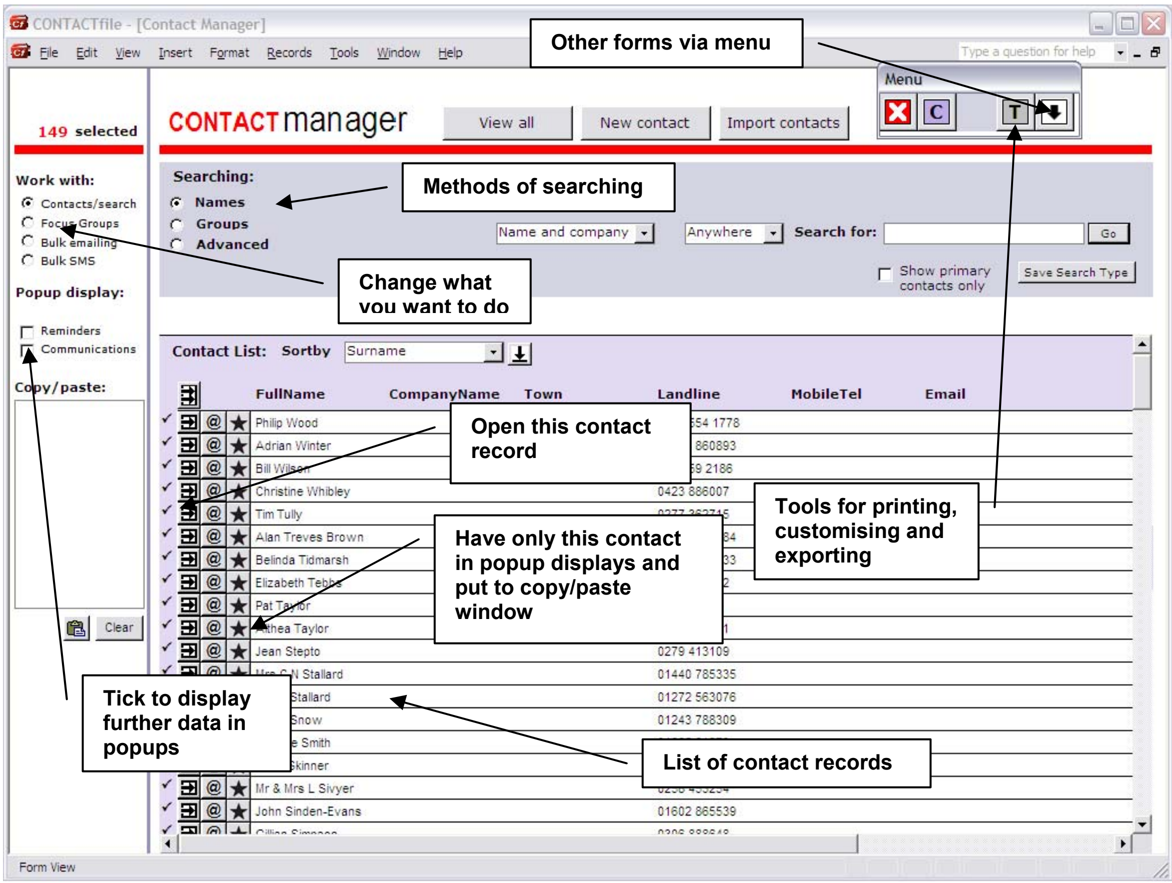
4. The Contact Manager

4.1. Overview

The Contact Manager has been designed to allow you to do most commonly-used tasks.

- Search for someone and view their details
- Construct focus groups (part of Pro module – see Pro section)
- Create individual or bulk email address strings
- Send individual or bulk SMS messages
- Be reminded about things
- Record your interactions
- See the list of projects (only with suitable add-on modules)
- Use the Tools for printing and exporting

Once you have entered a few contact records the Contact Manager will look something like this:



The form has four main ways of working:

a. **Contacts/searching:** Viewing the list of contacts you have in the database, searching the list in different ways, viewing the whole contact record, and initiating emails or SMS messages;

b. **Focus groups:** Using the searches to identify particular people you want to deal with for a stated purpose. Maybe you have a meeting to arrange or a campaign to run.

c. **Bulk emailing:** Using the searches to list the people you want to email.

d. **Bulk SMS:** Using the searches to list the people you want to send a text message.

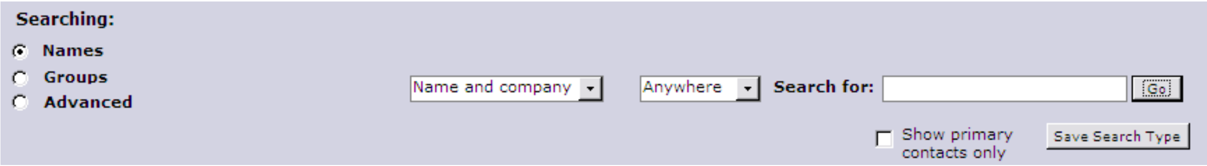
Each of these functions work in combination with searching the contact list and are described in more detail in the following sections. The Tools can also be used to customise the display, print resulting lists in various ways, and to export the selected data to Excel or MailChimp.

4.2. Contacts/Searching

The top section of the Contact Manager is where searches can be defined.

Names

Initially, the display will request a search on someone's name, but there are many other types of searches available to you. Type letters from the person's name or from the company name and press [Enter] or click **Go**.



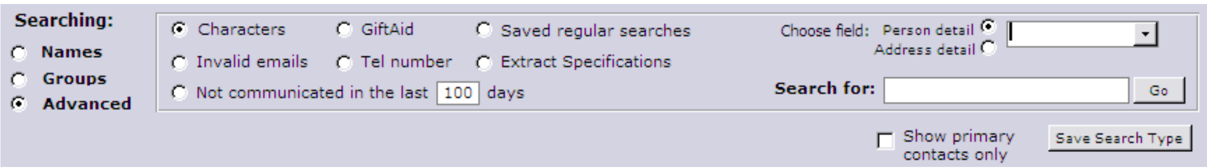
Groups

Choose the 'Groups' option on the left-hand side, and group options will be displayed:

All of these request a list of people belonging to a different group. Each works in a similar way – choose the type of grouping you want, then choose from the dropdown list the exact group. The set of options are used in combination with the options at the bottom, so that you can, for example, search for all your people in the allotment society who have a mobile number.

Advanced

Choose the 'Advanced' option on the left-hand side, and further options will be displayed:



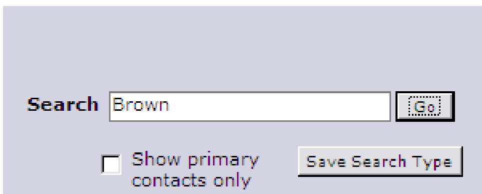
- **Letters in field:** To find data stored in any Person or Address field. Choose whether you want fields about the Person or Address, and type the data you need.
- **Saved regular searches:** As you do your searching, the save specifications can be saved. Use this option if you want to repeat previous searches.
- **All people at…:** Differentiate between people at home or work addresses.
- **Extract specification:** Part of the Pro module – see Pro section.

Primary contacts only

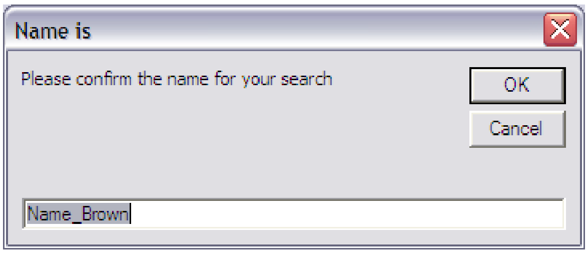
As it stands, the program will return a list of people who match the search criteria. So if you have a company with many employees and that company is included in the search results, all the employees will be listed. If you wish to see just one – the primary contact – (so that each row in the results will consist of a different address) tick the **'show primary contacts only'** box.

4.3. Saving searches

While you are carrying out searches, you have the opportunity to save them for use another time. To save the search, click **'Save search type'**.



A default name for your search will be offered, but you can type in your own name if you prefer. A successful save will result in a SAVED message displayed below, on the right.



4.4. Focus groups

Focus groups are more flexible groupings that can be used to hold groups for purposes that are more temporary, such as running a Lead Generation Campaign, or for organising an event. This is part of the Pro module, and is covered in the notes relating to Pro.

4.5. Bulk emailing

Bulk emailing is sending the same (or similar) email message to many people. CONTACTfile does not compile the actual email – it is assumed that you already have software for doing this. It manages the process of identifying who must be included and prepares the way for sending, whichever system of emailing you might be using.

You might also consider using advanced data extraction of email addresses, particularly where you are using a web-based emailing service such as 'Constant Contact' or 'MailChimp', where the contact data needs to be uploaded to the site first.

Click **'Bulk emailing'** at the top of the left panel on Contact Manager, and the screen is arranged in two halves - the top half is for making a selection and the bottom half is for managing and creating your email list.

Email Addresses overview

CONTACTfile can be used to generate continuous lists (known as 'strings') of email addresses, for use in this way. The string can carry all the email addresses you need, probably those of a defined group. Once generated, you can 'Copy-Paste' them for use in any email program you like!

However, if you have a great number of recipients it is best to restrict the number of email addresses in one email to 20, as this will avoid you being labelled as a generator of spam! Send duplicate emails to different blocks of recipients or use a web-based emailing service and export the data you need.

Deciding which email address to use

Every contact in your database may have two emails, one for work and another for use at home. Both can be entered in the 'Person details' screen. It wouldn't be appropriate for your contacts to receive an email from you twice! So in automatic routines, CONTACTfile only makes use of one of these, but you have the freedom to say which it will be.

By default, CONTACTfile will choose the first one you've entered. If you enter a second email and would like this to be the one used, change this in the More details section of the person's record. In the image below, the work email is being used, click the **Change** button to use the home email instead.

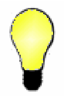
Selecting who will be a recipient

In Contact Manager, use the searching techniques described previously to find the set of recipients you need. Once you have the selection the list will be used as the basis of email address-string generation.

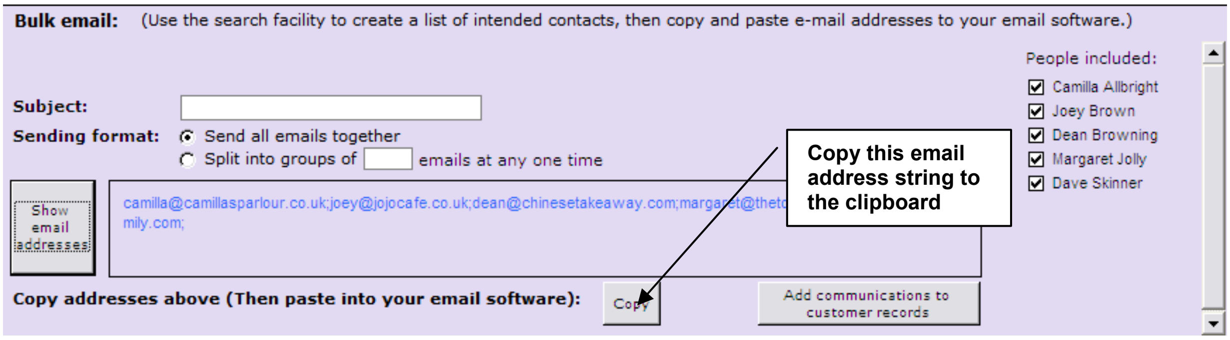
Creating a single email address string (one email to be sent to many people)

Choose to **work with: Bulk emailing** in the options in the top left-hand panel. In the lower half of the screen:

- Enter a **Subject** (only needed if you wish to record this as a interaction).
- Under **Sending format**, elect to send all emails together.
- Click **Show email addresses**. This will join the selected email addresses in a long line, and show them in the adjacent box. Note that this may take a little while, particularly if the number of records selected is very large.
- Click the **Copy to clipboard** button to copy the email address string to the clipboard.
- Make Outlook (or your emailing program) active, and use **[Ctrl]+[V]** (or right-click) to paste into the Bcc: field.



Whenever emails are sent to several recipients at the same time. In these circumstances, use the Bcc: field for the recipient list, and the To: field used to send a copy to yourself. This will ensure that none of the people in your list are able to see the email addresses belonging to the others.

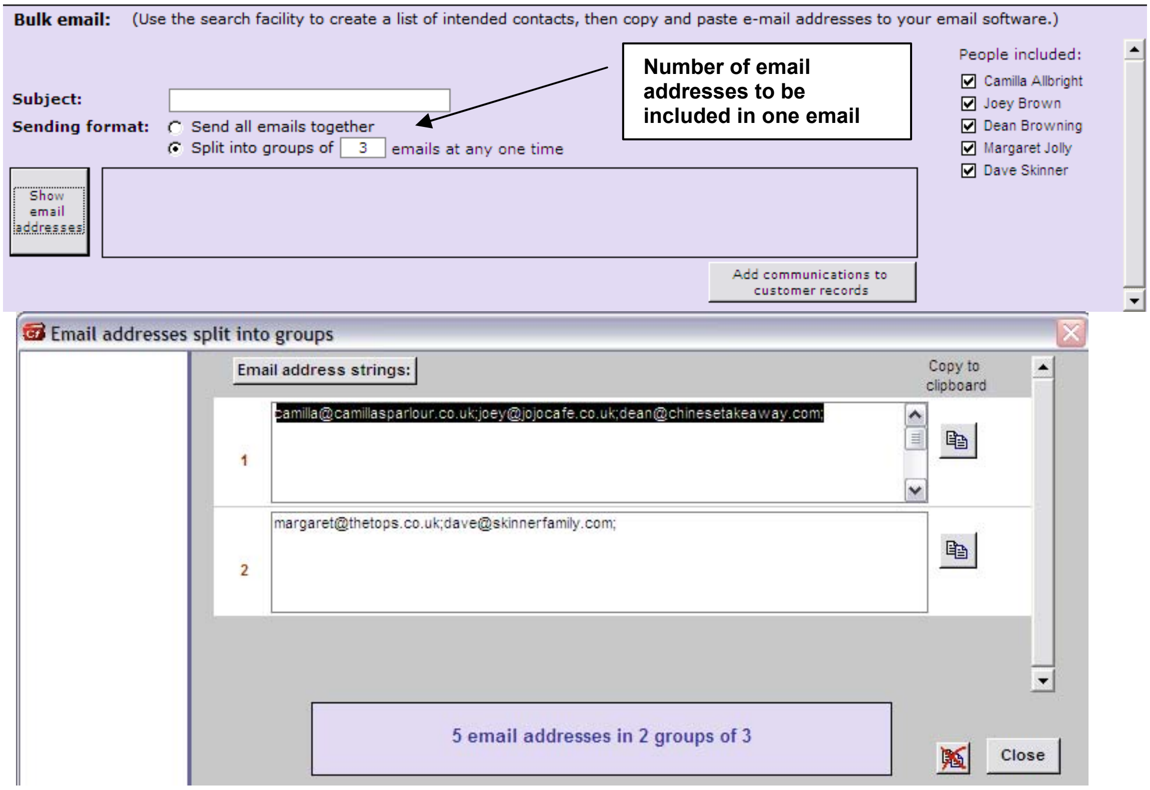


Creating a multiple email address strings (email to be sent to many people, spread across several identical emails)

Whichever group of addresses is selected, the display will tell you how many email addresses you have to deal with. Normally, it will be OK to send them all in one email. Some email service providers, however, limit the number of recipients that a single message may have. If the number is in excess of this limit you can change the sending arrangements so that several identical emails are constructed, each with a set number of email addresses.

In this case:

- Enter a **Subject** (only needed if you wish to record this as a interaction).
- Under **Sending Arrangements**, elect to **Send all in equal passes of…** and enter a number which is below your limit.
- Click **Create email address strings**. The email addresses will be placed into groups with a maximum size as specified.



Once the email string has been created, the list on the right shows the names of people who have been included.

Recording these emails as interactions

Before creating interaction records for recipients to this email, you can, if you wish, deselect any of the people listed on the right, and a interaction record will only be created for those still ticked. Click **Add interactions to customer records** button, and the records will be created.

4.6. SMS text messaging

Overview

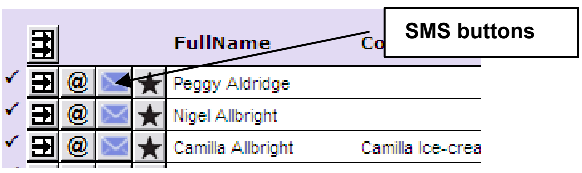
SMS text messaging is the process of sending a text message to someone's mobile phone. In CONTACTfile, you can SMS people individually and also groups of people in a bulk send.

Setting up

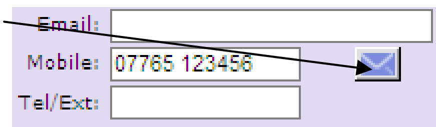
Before trying this out, you will need to obtain an **SMS username** and **password** (free) from your CONTACTfile supplier, and enter these into the **Setting Up** form. If necessary, you will be prompted to do this, and the form will be displayed automatically.

Sending individual SMS text messages

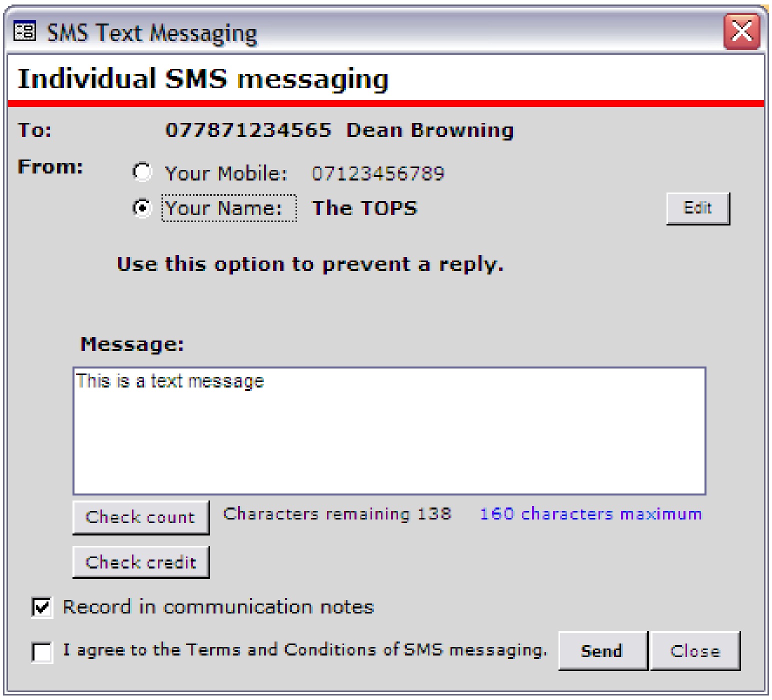
Individual SMS Text messages can be sent from a contact record, or from the list offered in contact manager. Both operate in the same way. Just click the SMS envelope button next to the mobile number of your choice, and a dialog is presented.



Contact manager



Contact record



Complete the dialog options as follows:

- Ensure that the message is to the person intended.
- Tick the checkbox to indicate whether you wish to record this interaction
- Choose that the message is sent from your own mobile number if you want a reply. Your mobile number MUST be in International format. Choose that the message is sent from your name to disable replies.
- Complete the message – 160 characters maximum.
- Agree to the Terms and Conditions. These are available for view on www.cmdatabases.co.uk/tandc_sms.htm. Note that all sends are charged, whether or not delivery is successful (since this depends on third-party mobile operators).

Click **Send**. A message will confirm that the send has been successful.

Sending bulk SMS text messaging

This process is very similar to the creation of email address strings. But care is required! With creating email address strings, no emails are sent until the result is copy-pasted into an email, but with SMS messaging, the send is carried out immediately.

Selecting who will be a recipient

In Contact Manager, use the searching techniques described previously to find the set of recipients you need. Once you have the selection the list will be used as the recipient list for your text. Before sending, you can, if you wish, deselect any of the people listed by removing the tick on the right, and a text will only be sent to those still ticked.

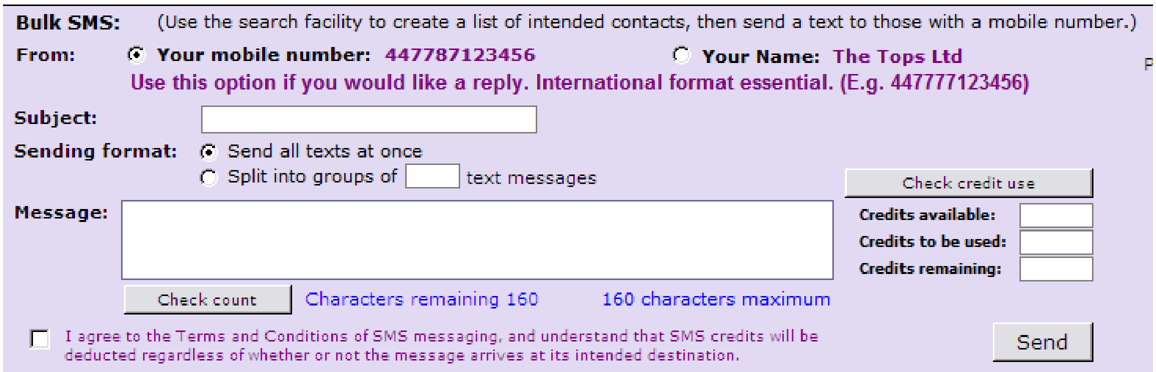
Choose to **work with: Bulk SMS** in the options in the top left-hand panel. As with email addresses you have the choice of sending all in one pass, or in phased passes.

Send all texts at once

In the lower half of the screen:

- Enter a **Subject** (only needed if you wish to record this as a interaction).
- Under **Sending format**, elect to send in one pass.
- If you are unsure of your credit status, click the button to check credit use.
- Agree to the Terms and Conditions, noting the likely charge. These are available for view on www.contactfile.co.uk/tandc_sms.php. Note that all sends are charged, whether or not delivery is successful (since this depends on third-party mobile operators).

- Click **Send SMS messages**. This will start to send the message to the selected mobile numbers, and the people included will be displayed as it happens. A tick beside a person's name indicates that the send was successful. Note that the whole process may take a little while, particularly if the number of records selected is very large.



Recording these SMS messages as interactions

Click **Add interactions to customer records** button and the interaction records will be created.

Send in several passes

Whichever group of addresses is selected, the display will tell you how many SMS messages you have to deal with, although it might be wise to check that you have selected the 'With mobile' option. Normally, it will be OK to send them all in one pass. However, you may wish to have the option of stopping the process mid-stream, and in this case:

- Enter a **Subject** (only needed if you wish to record this as a interaction).
- Under **Sending format**, elect to send in equal passes, and say how many messages will be in each pass.
- If you are unsure of your credit status, click the button to check credit use.
- Agree to the Terms and Conditions, noting the likely charge. These are available for view on www.contactfile.co.uk/tandc_sms.php. Note that all sends are charged, whether or not delivery is successful (since this depends on third-party mobile operators).
- Click **Send SMS messages**. This will start to send the message to the selected mobile numbers, and the people included will be displayed as it happens. A tick beside a person's name indicates that the send was successful. After the first pass is complete you will be prompted to confirm that you wish to continue.

5. Importing data

Routines are available to import your data from other CONTACTfile datafiles, Outlook Express, Excel, Outlook, Sage and/or from ACT! Although it is possible to undo this process, the routines are intended to facilitate a once-only transfer of contact data from an External file. The process does NOT attempt to match or update existing records; if matching records already exist in this database they may be duplicated[6] by this process.

Excel is used as a vehicle for carrying exported data. You can export lists from many of the forms in general use throughout CONTACTfile, and there's a facility specially provided.

Unless you are just beginning with a new database, you are strongly advised to create a backup of your existing database, especially before importing.

5.1. Importing data (and removing it again)

With the exception of importing from other CONTACTfile datafiles[7], data will be imported according to the following rules:

- Records will be classed as business contacts ONLY IF the company name is filled in; otherwise they will be recorded as personal contacts living at home.
- Where repeat organisation records exist, one record will be created for each instance where the company name and postcode are different. Where the company name and postcode are the same, only one of these instances will be imported. This, however, will not exclude the details of the people who work there.
- Contacts who have no address entry at all will be imported with a 'no address' record.
- Not all data will be imported. There may be many occasions where you have entered unusual data; only the basic contact information will be imported.
- These rules apply to the records contained in one importation routine. In any importation, the process is self-contained and does not examine any records already in CONTACTfile. If a second importation contains any duplicate records to the first, therefore, they will not be filtered out and the duplicates will remain.

You should be aware of this should you choose to proceed.

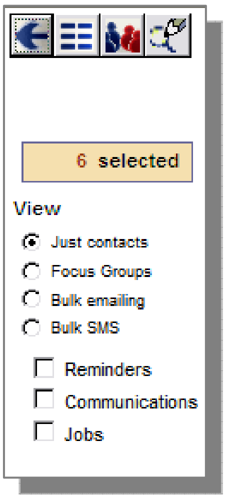
See the appendix on full user notes for details on how to use any of these importation routines.

[6] Restrictions apply to importing addresses – no two addresses with the same company name, first line of address and postcode, will be permitted during the importation process.

[7] Other CONTACT*file* datafiles will be imported as they are, without making any changes to the address status.

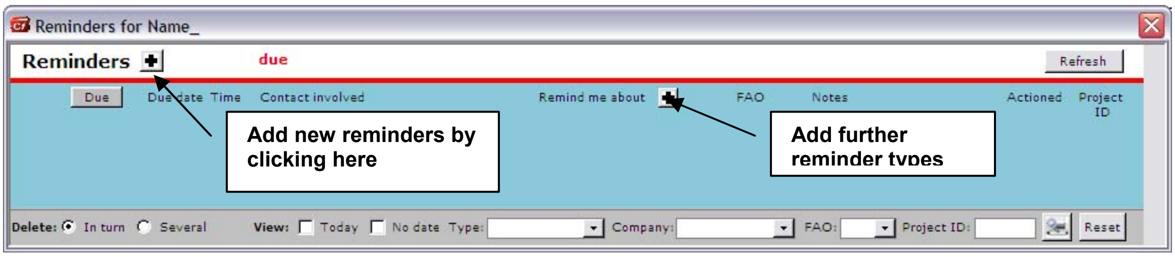
6. Reminders

6.1. Reminders overview



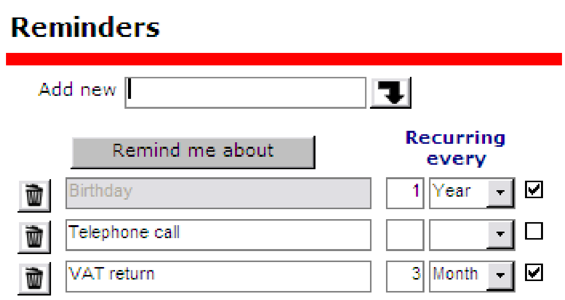
The reminder system is designed to assist you in dealing with your contacts in an efficient way. Reminders are set in the Contact Manager, in contact forms, and at various other times in response to prompts. Reminders carry the name of the person involved (this could be you or any of your staff), with the date of action and the type of action required. Once actioned, reminders can be ticked off and are then converted automatically to interaction records (see later section).

When you start, there will be no reminders. But have a look at the (empty) reminder display - either tick the Reminders option on the Contact Manager.



6.2. Reminders about

Before you can enter any reminders, there needs to be a list of the things you want to be reminded about. Use the **'Add further reminder types** button. Here you can list the things you wish to be reminded about. A couple are provided in the list already, but you can alter or add to this list at any time. Reminders that are required at regular intervals can be given recurring status by entering the interval as shown. In our example, a reminder to issue a VAT return is required every 3 months.



New Reminder

Reminders can be added manually or automatically.

To add a reminder manually, click the '**Add New Reminder'** button in the top left corner of the reminder popup. An empty reminders record appears, which looks like this:

Start by entering the date and time when the action needs to take place. If today's date is required, double-click the date box. Then enter the name of the person involved – type the first few letters of the surname, to save scrolling down. (Note that if you are on a contact record, only the names of the people at the address will be available in the dropdown.) Then choose the type of reminder – the number of days warning will be entered automatically. Next, choose the member of staff who is to act upon the reminder, and enter any notes as appropriate.

When completed, click the bent down arrow at the end of the row. This will transfer the reminder to the list of reminders below. If you change your mind, click the up arrow button at the left edge – this will hide the new record display until you need it again.

After the reminder is in place, you can:

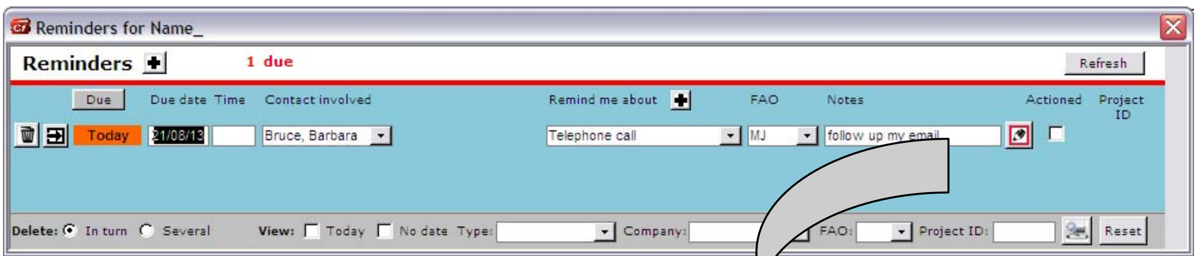
- Delete the reminder whenever events may render it inappropriate - click on the delete button on the extreme left
- View the record – click the button on the left hand side
- Change the date or time
- Add notes
- Tick the 'Done' box, as having taken action on the reminder.

If you have a large number of reminders, it may be helpful to limit the list of one type only (just the birthdays, for example) by choosing from the 'Reminder type' option box at the bottom. Similarly, you can restrict the view to just one company, one member of staff, or (if you have add-on modules), the Job ID.

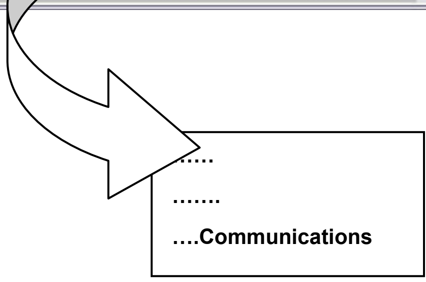
Sometimes, you will be offered the opportunity to have a reminder stored automatically. When you enter someone's birthday (for example) a reminder for the next birthday occasion will be offered, and all you need to do is click Yes to confirm.

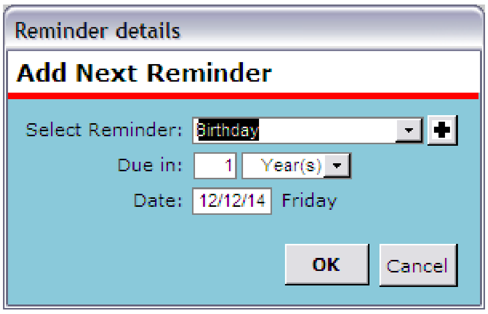
When a reminder becomes close (within 7 days by default) it will be included in the pending display. This is displayed automatically when the database is opened, or by clicking the **'Reminders due'** button on the main menu (see next section).

6.3. Acting upon reminders



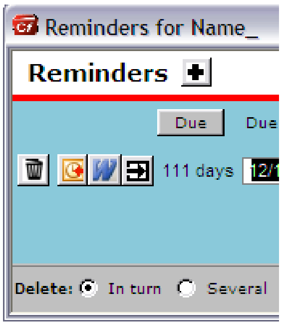
Once a reminder has been acted upon, a tick indicates that this has been dealt with. The tick also acts as a prompt for the computer; it will automatically remove the record from the reminders display and convert it to a communication record (see later section).





If the reminder is recurring, you will be offered the chance to automatically create a reminder for the next one. Change the type of reminder and the period if you wish, and click OK.

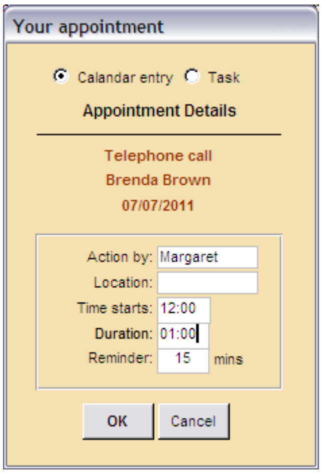
6.4. Links to Office



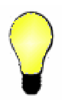
If you have purchased the Office version of CONTACTfile, you'll see that two additional buttons are available on the left hand side of each record:

1. Link to Outlook calendar and task list
2. Link to Word templates.

Links to Outlook



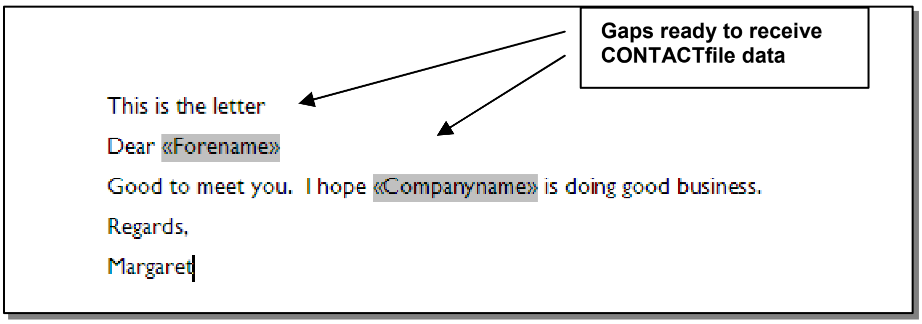
Here is an opportunity to send any of these tracking stages to Outlook's Calendar or Task list, where they will be placed alongside your other appointments or tasks. Click the button, and a dialog requests further details about the appointment – the time it must start, how long it will last, and how many minutes reminder time you would like – but there is no need to change the defaults if these are not appropriate. Click OK, and the appointment will transfer.



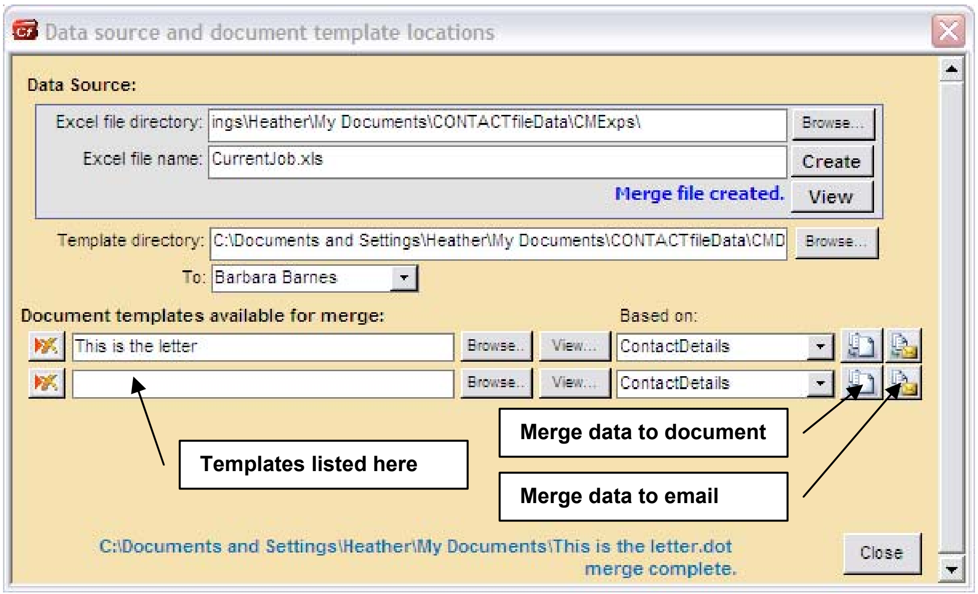
It may not be necessary to open Outlook before sending appointments to the calendar. If several of you are using the same Outlook calendar, you can set up Outlook to display appointments in different colours, depending on who the appointment is for.

Links to Word templates

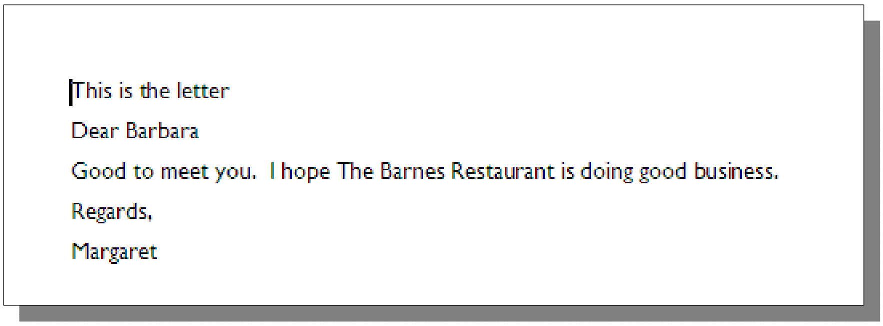
If you send out similar emails to many people over a period of time, it is possible to save the content of an email to a Word document, have spaces where the text needs to be personalised, and merge the data from CONTACTfile to the email to be sent. Click the button, and a dialog offers any templates that have been previously constructed. Here is a simple example of a word template:



(The construction of Word templates is outside the scope of this manual, but a help video is available on www.cmdatabases.co.uk/support.php)



Click either the button to merge data to a document, or to an email, and Word will open with the data filling the gaps.



This is the letter

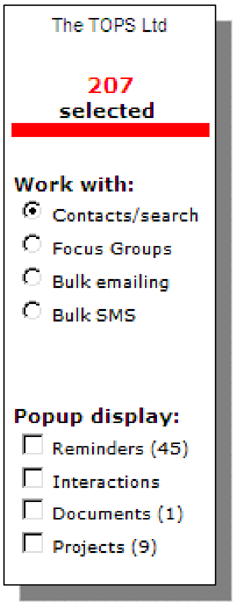
Dear Barbara

Good to meet you. I hope The Barnes Restaurant is doing good business.

Regards,

Margaret

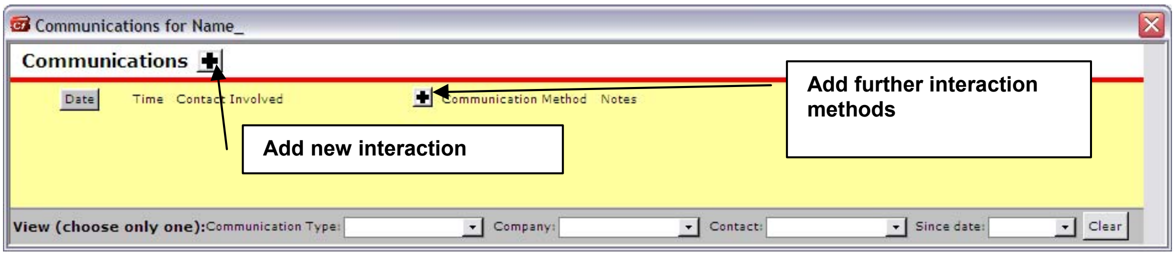
7. Interactions



The Contact Manager (and several of the other forms) have an option to display interactions. This is for you to view the occasions when you have been in touch with anyone, and to record new occasions as they happen.

The interaction system is designed to assist you in dealing with your contacts in an efficient way by reminding you of what has happened in the past. Interactions can be set in the Contact Manager, in contact forms, when reminders are actioned and at various other times in response to prompts. Interactions carry the name of the person involved, the date and time it happened, and the method of interaction used. If you wish, you can attach documents (or emails, spreadsheets or anything else) by setting up hyperlinks.

When you start, there will be no interactions. But have a look at the (empty) interaction display by ticking the Interactions option on the Contact Manager (for example).



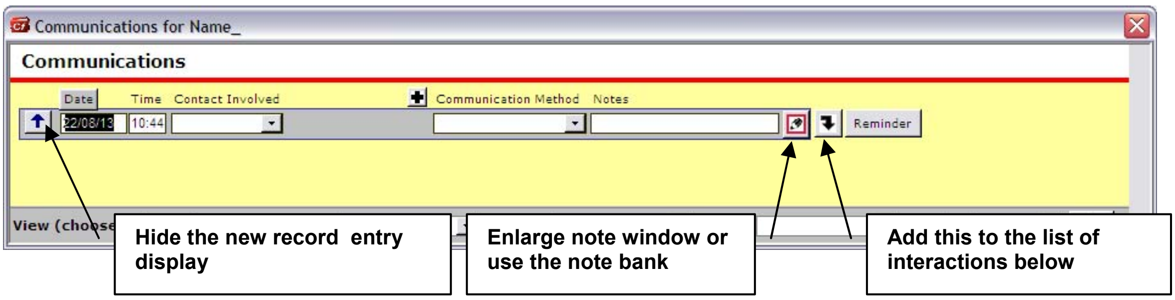
7.1. Interaction methods

Before you can enter any interactions you'll need to make a list of the ways in which you plan to communicate. Use the **'Add further interaction methods'** button. Here you can list the methods you might use to communicate – some are provided for you already. You can alter or add to this list at any time.

7.2. New interactions

Interactions can be added manually or automatically.

To add a interaction manually, click the '**Add new interaction**' button, in the top left corner of the interactions popup. An empty interactions record looks like this:



The date and time are entered automatically with the current date and time. If this is not correct, edit accordingly by overtyping. Then enter the name of the person involved – type the first few letters of the surname, to save scrolling down. (Note that if you are on a contact record, or if you have chosen to expand a chosen contact on the Contact Manager, only the names of the people at the address will be available in the dropdown.) Then choose the interaction method and enter any notes as appropriate; see next section for using the note bank.

When completed, click the bent down arrow at the end of the row. This will transfer the reminder to the list of interactions below. If you change your mind, click the up arrow button at the left edge – this will hide the new record display until you need it again.

After the interaction is in place, you can:

- Delete the record, perhaps when duplicates have been generated - click on the delete button on the extreme left
- View the record – click the button on the left hand side
- Change the date or time
- Add notes.

If you have a large number of interactions it may be helpful to limit the list of one type only (just the telephone calls, for example) by choosing from the 'Interaction type' dropdown box at the bottom. Similarly, you can restrict the view to just one company, one member of staff, or all from a particular date.

Note that sometimes you will be offered an opportunity to have interaction records created automatically. For example, when you generate a string of emails, a interaction record for all the people included can be achieved by a simple response to the prompt offered.

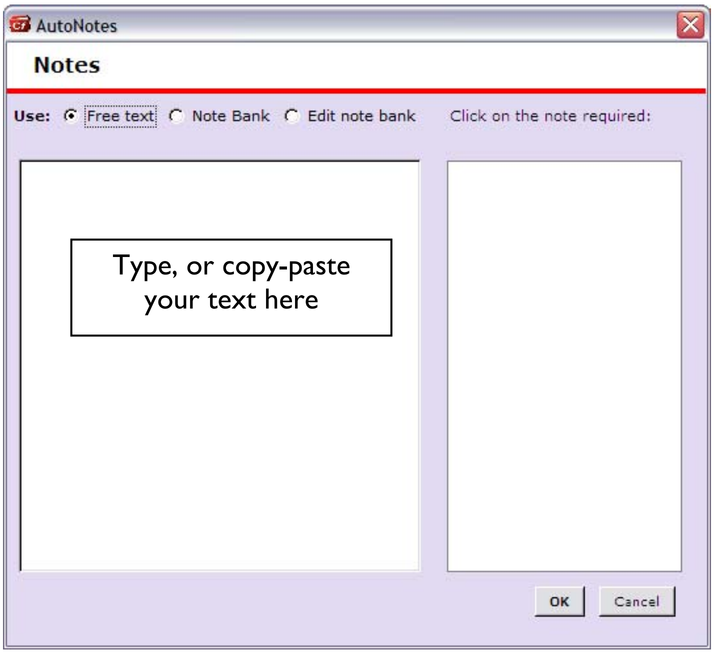
7.3. Editing notes and the note bank

The **Auto Notes** button provides two other ways of editing notes beyond merely typing directly into the notes box.

1. Place text freely into a larger text window, or
2. Draw from a bank of commonly-typed notes.

Free text

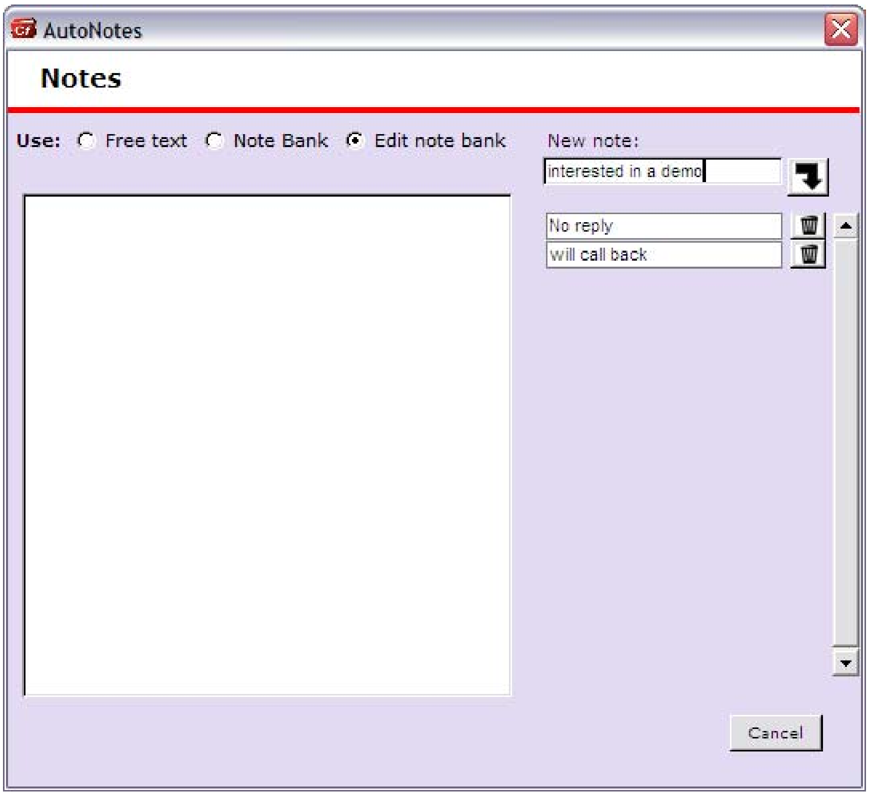
Type or copy/paste text into the window on the left-hand side.



The Auto notes dialog as arranged for typing directly into a larger window

The note bank

The right-hand side of the dialog is used for drawing commonly-typed notes from a 'Note bank'. This saves you typing the same thing over and over again.



Auto notes dialog as arranged for adding notes to the note bank

At the start, the NoteBank will be empty. Choose the **Edit note bank** Mode. In the box at the top right, type in a phrase that you feel might be needed a lot in your business. Then click the bold down-arrow to add it to the bank. Continue adding more as appropriate. Then choose the **Note bank** Mode. Thereafter, a click on the bank entry will automatically put the text into the notes for the record.

8. The Tools

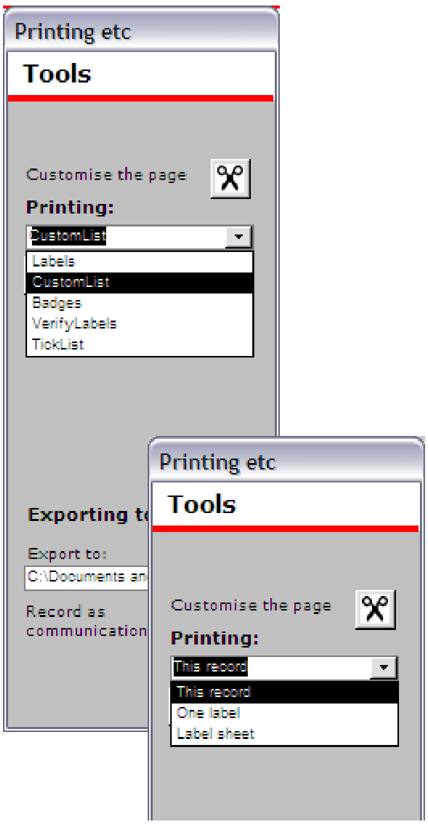
Many of the forms, particularly those that display lists of some kind, have Tools – a form that offers appropriate utilities such as printing, emailing, or exporting in a unified way. To view the Tools, click the T button on the main menu. Here, we see the Tools as it appears with the contact manager.

8.1. Settings

Mostly, the Tools will provide settings that are suitable for the situation as it currently stands, but most are adjustable if required.

- **Customising**: change the way the form looks (Pro only)
- **Printing:** Print your selected records in several ways, for example lists, labels etc.
- **Export to MailChimp:** This will only be displayed if you have entered your MailChimp settings. A click on the MailChimp button will upload the forename, surname and email address to the selected MailChimp list.
- **Export to Excel:** The default location will automatically be displayed, but click **Browse…** if you would like to change it.
- **Record as interaction:** All exports to Excel can be taken to be a interaction with each of the contacts listed, if you wish. This may be appropriate if your intention is to use the exported list for generating mail-merge emails, for example.

8.2. Printing in general



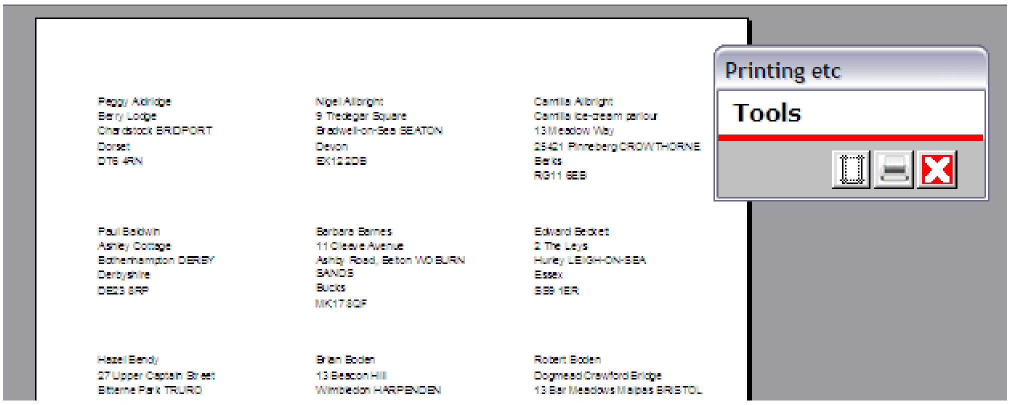
The printing options offered will vary between forms. For example, the contact manager has 5 options: labels, custom lists, badges, verify labels, and tick lists. The contact record has 3: contact record report, one label, and label sheet. There are other types of printing to discover as you work through the various forms, but these are the most useful ones.

For each type of print, just choose the one you want from the dropdown list, fill in any other information as required, and click OK. Here we have shown the requirements supplied for producing a set of labels.

For the custom list, you'll have another form to fill in (see next section) but usually the print will be shown on screen next. The Tools will appear to have just three buttons:

- Use the first to change the layout
- The second to actually print it
- The third to close the print preview and return to the main program.

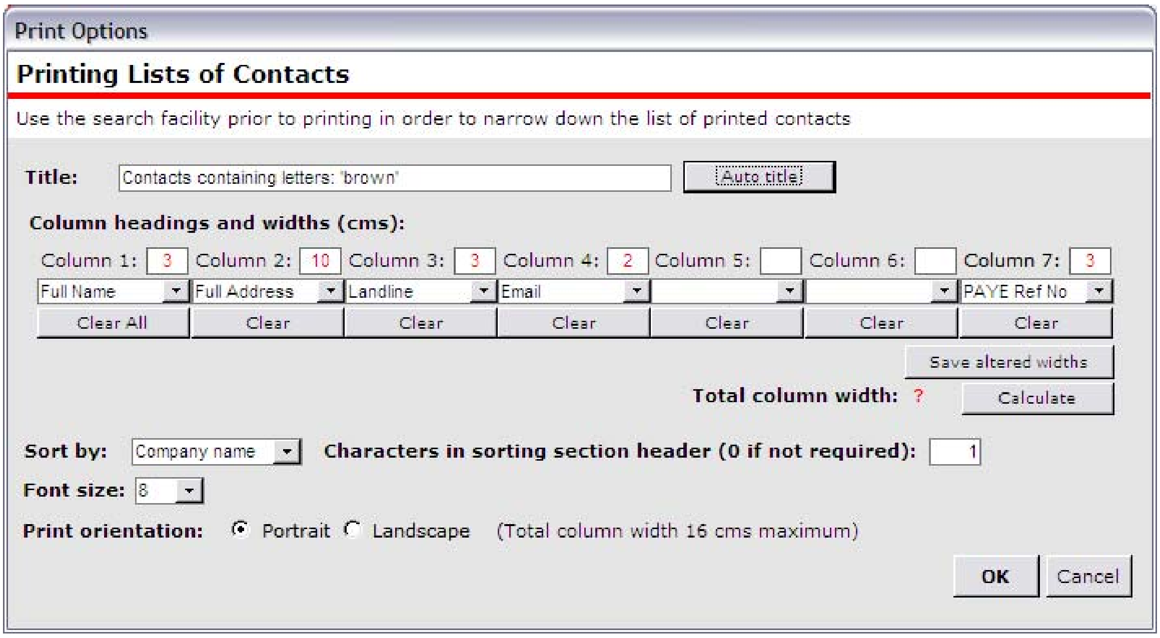
It is worth getting used to using these buttons (as opposed to using the menus provided as part of Access) as they have been designed to control the program in the correct way.



8.3. Custom lists

Custom lists are special in that allow you to choose the columns you would like to print. Once you have clicked OK on the Tools, the Print Options dialog will be presented. Fill it in as follows:

- Type a title or click to request an automatically-generated one. (In our example, we have used the contact manager to search for everyone called ‘brown’, and the automatic title reflects this.)
- By clicking on each of the dropdowns in turn, choose what you want to see in the first, second, third etc. columns of your printout. There is no need to use all seven. The first time of using, these choices will be empty, but subsequent uses will put these back as you left them.
- Consider how much width each of the columns require; change from the default of 3 cms to a width of your choice, and click the **Save Col widths** button so they are saved for next time.
- Choose how the list will be sorted by choosing from the options in **Sort by**. If you would like column headings, put a number in the **depth** box. (A number 1 will differentiate between the first letter of the sort - ‘A’, ‘B’, etc. A 2 will differentiate between the first two letters of the sort – ‘AA’, ‘AB’ etc.)
- Choose the font size.
- The orientation of the print will be set automatically; total column widths of 16 or less can be accommodated in portrait orientation.
- Click **OK** to view your printing.



9. Group Manager

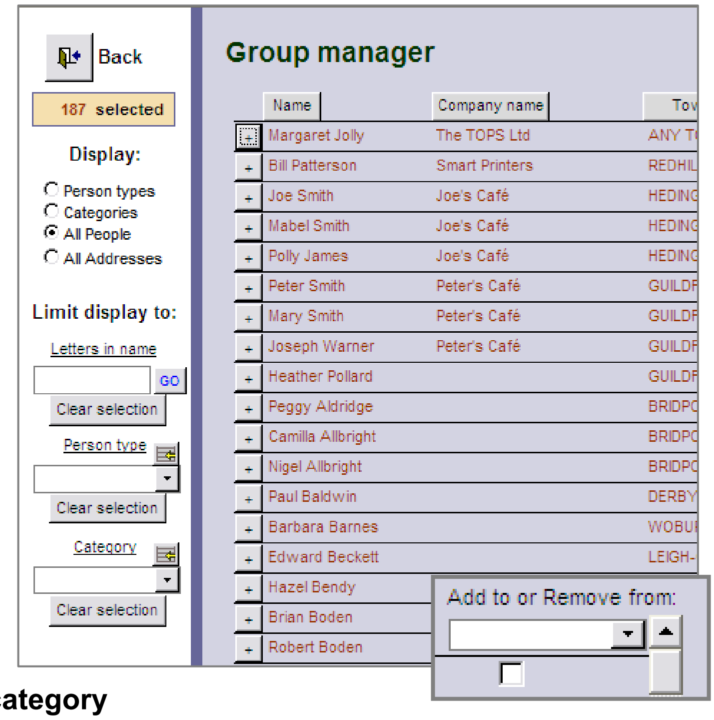
When entering new contacts, you were able to allocate them to categories of your own choosing. These could have been of two types:

- **Person types or skills:** Where individual people are assigned an appropriate category, to reflect individual qualities (for example, solicitor, secretary, counsellor, member of golf club).
- **Address categories:** Where the address, and everyone who works or lives there is assigned an appropriate category (for example, bank, café, legal. Home categories might be terraced or centrally heated).

Over time, membership of these categories may need changing. The Group Manager is an easy way to change membership of groups. It involves being presented with a list of contacts, and then ticking or un-ticking to represent changed membership. It is therefore to be used with contacts that are already in the database – not with new contacts.

To use the Group Manager, click the Group Manager button on the main menu.

When the Group Manager is first opened, all the people in your database are listed and the display indicates 'All People', but you can change this so it operates on an address basis by choosing 'All addresses' instead. Whichever type of category you are wishing to change, the process is the same.



Generally, the options in the left panel are for restricting the display to people who fit your selections; the left panel changes what you want to see. From here, you may view the records of the people whose:

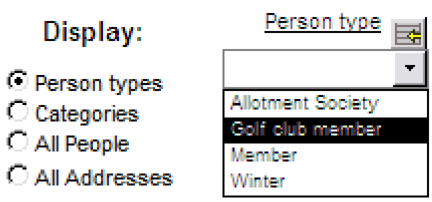
- Name fits the letters typed.
- Type or skill fits the chosen category.
- Address category fits the category choice.

Once you choose a particular category, the display changes to the 'Person types' option or 'Categories', as appropriate.

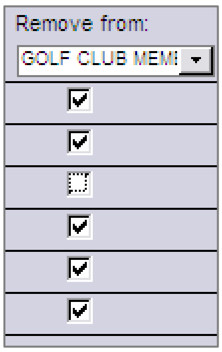
The 'Add to or remove from' option on the right shows which category you are choosing.

9.1. Removing members from a category

Person types

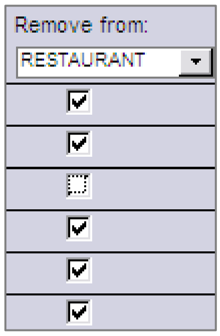


Let's say that we wish to remove people from our list of 'Golf Club members'. Begin by choosing 'Person types' for the display, and then person type 'Golf club member' from the left panel. This will restrict the list to those who are currently included in the group.



Then, remove the tick from any record where the category no longer applies. The changes will be saved once a different option is chosen, or when the form is closed.

Address categories

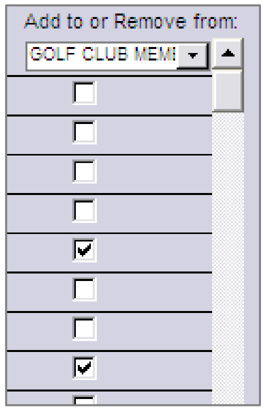


Let's say that we wish to remove addresses from our list of 'Restaurants'. Begin by choosing 'Categories' for the display, and the category 'Restaurant' from the left panel. This will restrict the list to the addresses that are currently included in the group. Then, remove the tick from any record where the category no longer applies.

The changes will be saved once a different option is chosen, or when the form is closed.

9.2. Adding members to a category

Person types

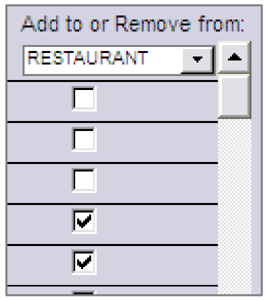


Let's say that we wish to add people to our 'Golf club member' group. Begin by choosing 'All People' for the display, and the category 'Golf club member' from the 'Add to or remove from' drop-down on the right.

This will have the effect of listing all people, and showing those who are currently in the 'Golf club member' group with a tick against their name. Add (or remove) people to (or from) this category by ticking (or un-ticking) the names appropriately.

The changes will be saved once a different option is chosen, or when the form is closed.

Address categories



Let's say that we wish to add addresses to our 'Restaurant' group. Begin by choosing 'All Addresses' for the display, and the category 'Restaurant' from the 'Add to or remove from' drop-down on the right.

This will have the effect of listing all addresses, and showing those which are currently in the 'Restaurant' group with a tick. Add (or remove) addresses to (or from) this category by ticking (or un-ticking) the box appropriately.

The changes will be saved once a different option is chosen, or when the form is closed.

10. Other facilities

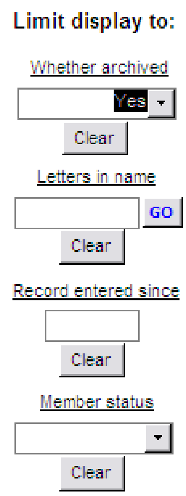
10.1. Archived contacts

This form provides a useful facility to go quickly to the details of a particular person, and is the ONLY way of finding contacts you have archived.

At the top, you have the choice of whether to display those with a home address or those with a work address, or both. Use these radio buttons to change the display.

Restricting the display

When you have more records than can be displayed on the screen at once, limiting the display to those that fit your search criteria can speed up the process of finding a particular record. This is done by using the selection boxes arranged in the left panel of the form. They can be used separately or in combination with one another. In all cases, click 'Clear' to show everyone.



The selections are:

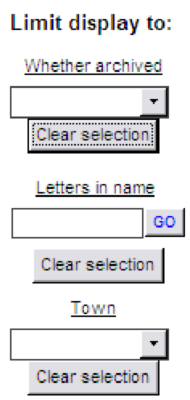
1. **Whether archived:** initially, this will be set to 'Yes', so that only archived contacts are shown. Choose 'No' for those still active on the database, or click 'Clear' to show everyone. Note that the archived field here refers to the person (and not the address); it is possible for someone to be archived, but others at the same address to remain active.
2. **Letters in name:** Type any letters from the forename or the surname of the person. The display will be limited to all persons whose name contains the letters typed.
3. **Record entered since:** type in the date you are looking for, and click Go.
4. **Member status:** for those who have the 'Club' add-on module.

When you have found the person you are looking for, click the + against their name and you will be taken to the appropriate record form, depending on whether home or work addresses are on display.

10.2. Archived organisations

This form provides a useful facility to go quickly to the details of a particular organisation, and is the ONLY way of finding organisations you have archived. Once the organisation is identified, a click takes you directly to the correct record on the 'People at Work' form.

Restricting the display

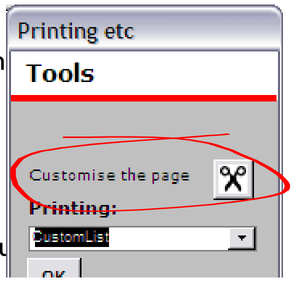


The display can also be restricted (and therefore focused) in four different ways, and these can be used separately or in combination with one another. In all cases, click 'Clear Selection' to restore the display to all records.

The selections are:

1. **Letters in name:** Type any letters from the name of the organisation. The display will be limited to all organisations where the name contains the letters typed.
2. **Town:** From the drop-down combo box, select the town of interest. Only records with addresses in the selected town will be displayed.
3. **Whether archived:** from the drop-down combo box, choose 'No' for those still active on the database.

11. Customising

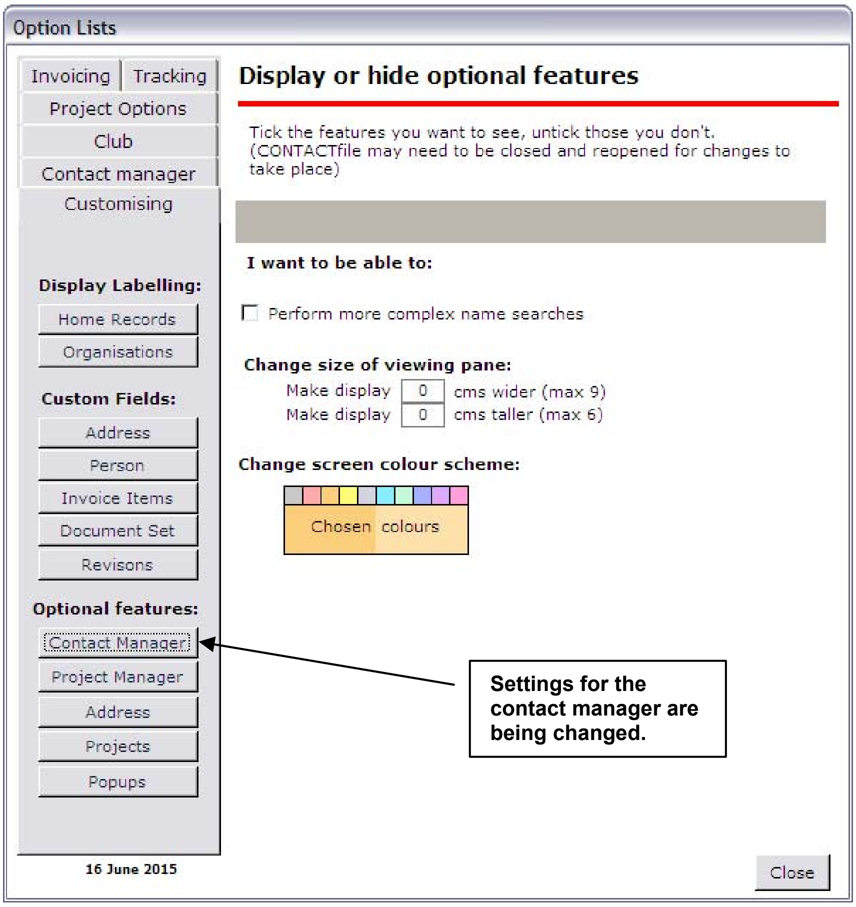


There are four different ways of customising CONTACTfile. You can

1. the way the form looks
2. the features available to you
3. the words used for labelling, and
4. there are customisable fields for your own special purposes.

The first three are changed via the Tools display. Click the scissors bu

11.1. Form appearance



To make CONTACTfile better fit your screen, type the number of centimetres wider and/or longer you would like it to be. To change the colour scheme, click the small box of your chosen colour. Whilst these settings focus on the look of the contact manager, they will also affect most other forms too. They will affect YOUR use on the computer you are using NOW; they will not affect other users on a network, or other users that come to use your PC.

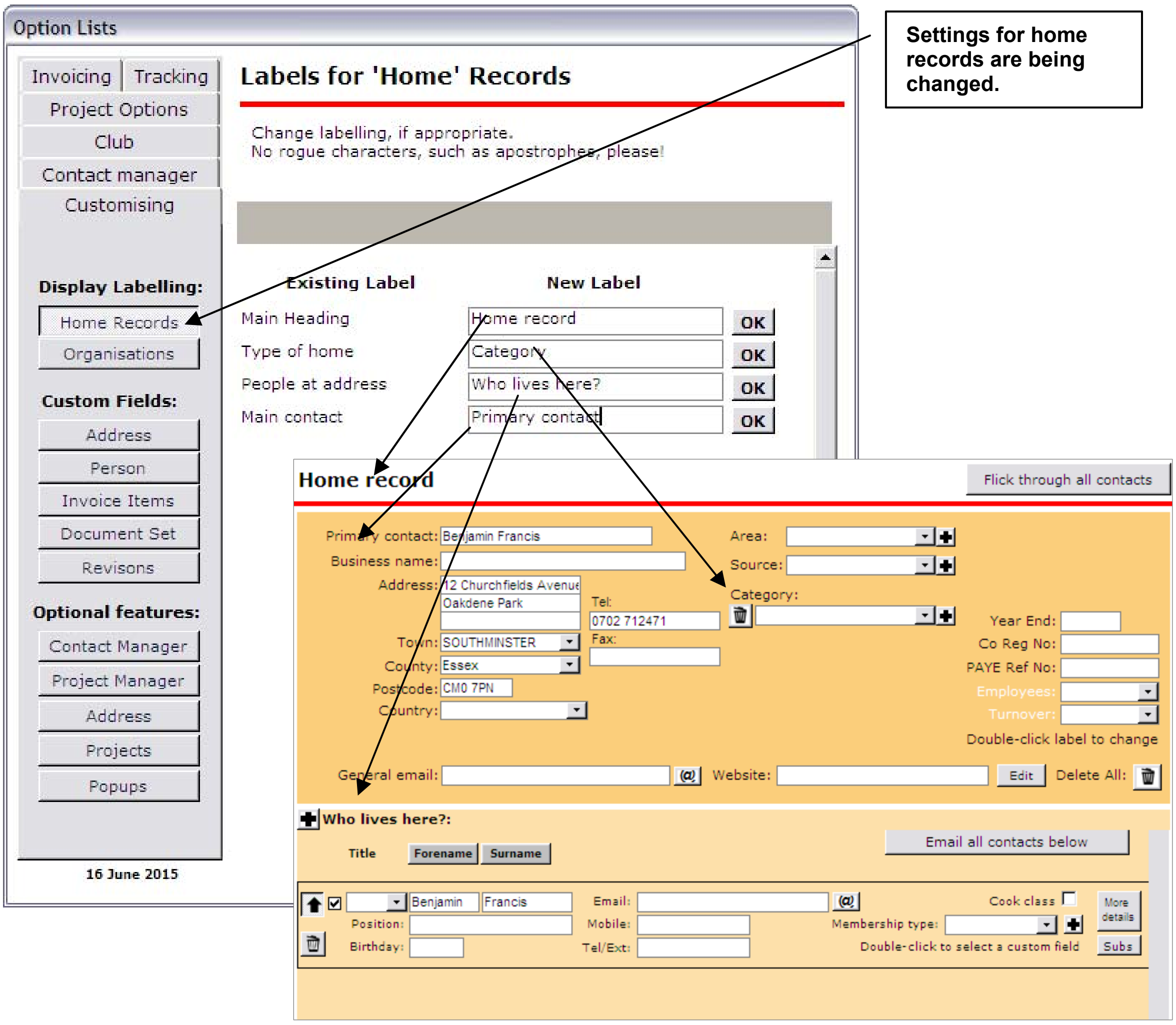
11.2. Form features

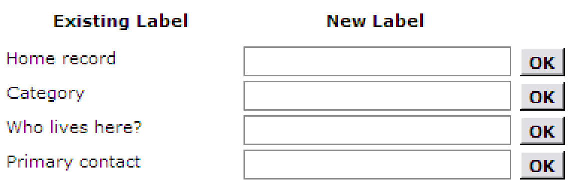
Different forms offer different features or functionality. Some are useful to most people, but others are useful to only a few. If you would like to try out more features than are initially on display, tick the box against the feature of your choice.

11.3. Popups

Click the popup button and tick the types of popups (Reminders, Interactions, Documents etc.) that you would like to be made available to you.

11.4. Display labelling





Type the labels you want in the white box. Stick to using ordinary text characters, and avoid using any unusual characters, such as apostrophes and brackets. Click **OK** when done, and the new label will become the existing label.

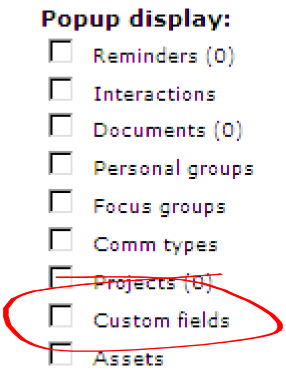
11.5. Customisable fields

Customisable fields are available for extending what you can record in two ways:

1. More about the address or organisation as a whole (such as when the business was established, or when the house was built, or which is the nearest railway station)
2. More about the person as an individual (such as if they prefer tea or coffee, the registration number of their car)

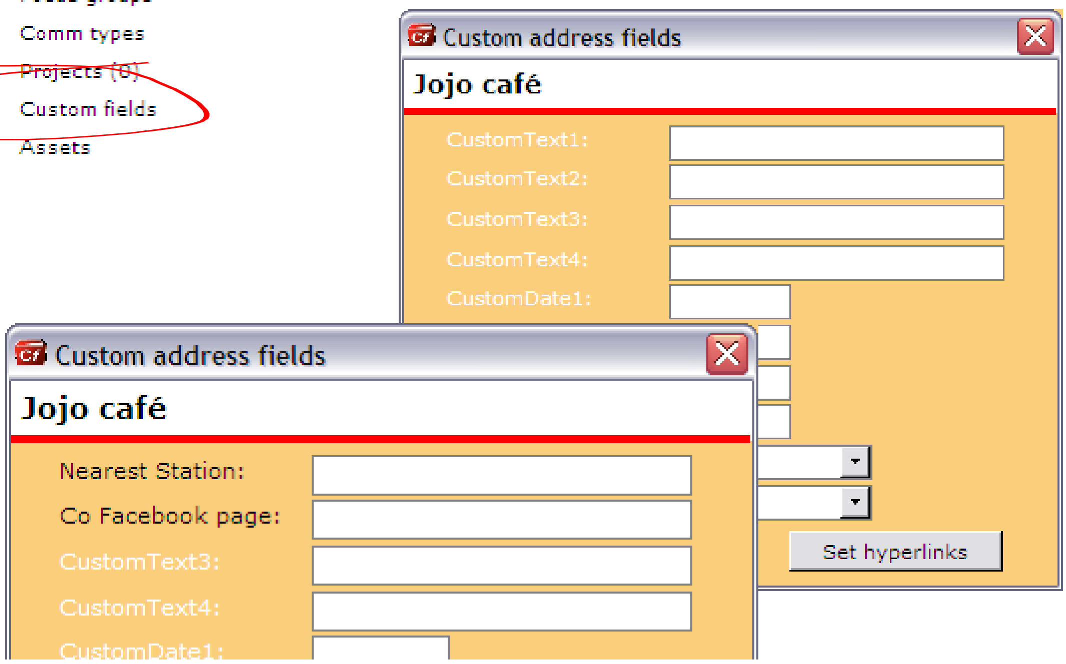
Both work in a similar way, but the custom fields for the address are only available via a popup.

Address/Organisation custom fields

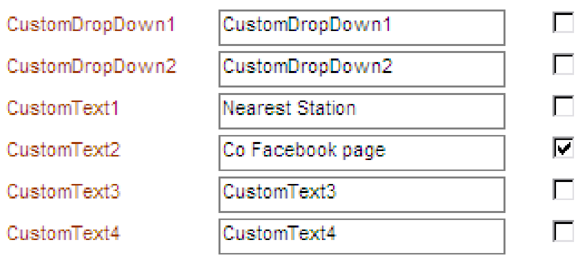


Here is the complete list of popup displays that are available from a contact record. If ‘Custom fields’ is not among them, use the ‘Customise’ button in the ‘Tools’, and request that it be displayed. (See ‘Form features’ section, previously.)

A tick in the ‘Custom fields’ box will result in the custom fields being displayed separately.



Double-click any of the white labels to change them to what you need them to be. If any of the fields should work as hyperlinks, click the ‘Set hyperlinks’ button, and tick the fields as appropriate. Once set, a click on the active field will open a webpage or available document.

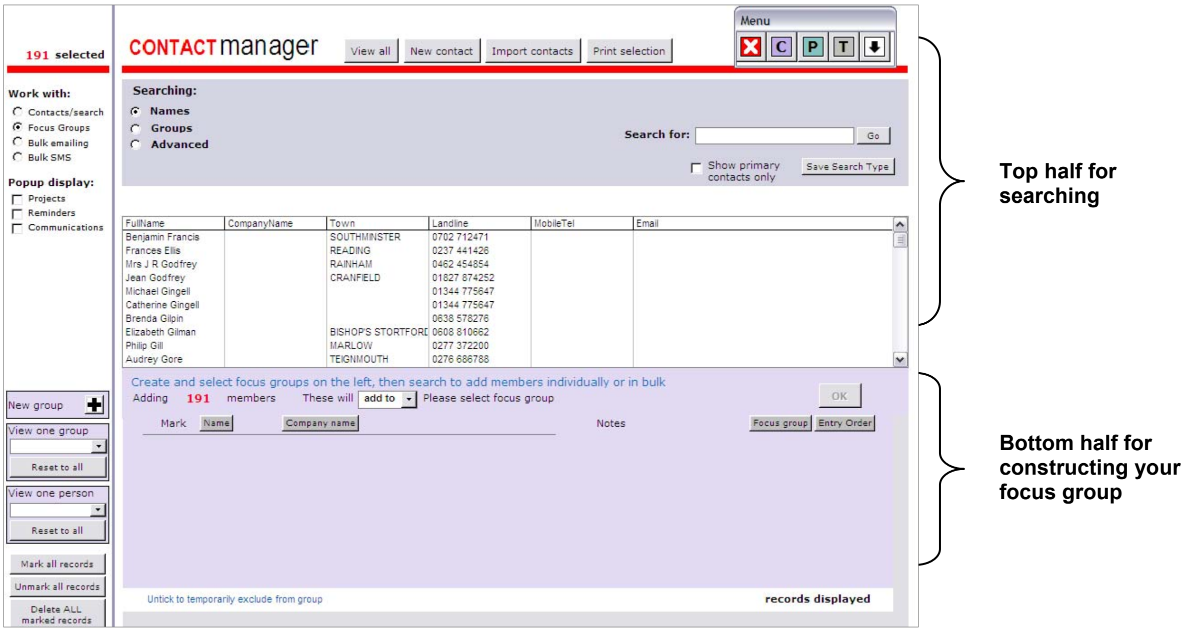


12. Focus groups

Focus groups are created from the selections you make from your contact list, so that each one consists of a set of people[8] who have something in common. Usually, this selection involves a search of some kind. Focus groups are created in the Contact Manager but can also be done, in a limited way, via the contact record.

Making Selections

Opt to **'work with'** focus groups (choice given at the top of the left panel).



Broadly, focus groups are formed by finding the person you want by using the different search methods, and once found, by transferring the chosen record into the focus group displayed in the bottom half of the screen. The display in the centre will show how many records you have ready for transfer to the focus group.

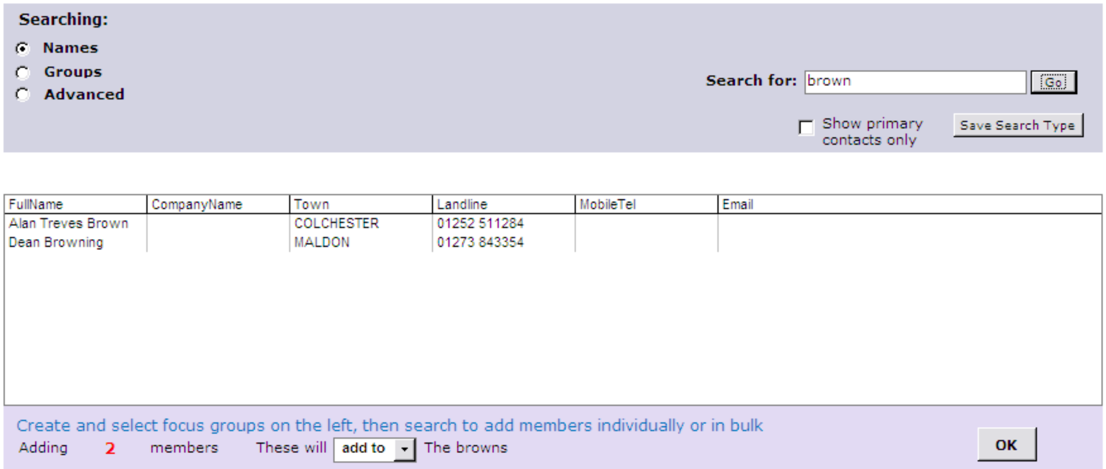
Making a new focus group

First, an empty focus group structure is required. This can be done in 'Options lists', but a click on the plus button against **New group** will take you straight there. Provide a suitable name for your focus group (for example, 'The Browns'), close the Option Lists form, and select the group you have just defined.

[8] An organisation cannot be a member of a focus group unless you have someone working there. If an organisation has several employees and the selection is carried out on organisation properties alone, all employees will become members of the focus group. This, of course, can be edited afterwards, and the unwanted employees removed.

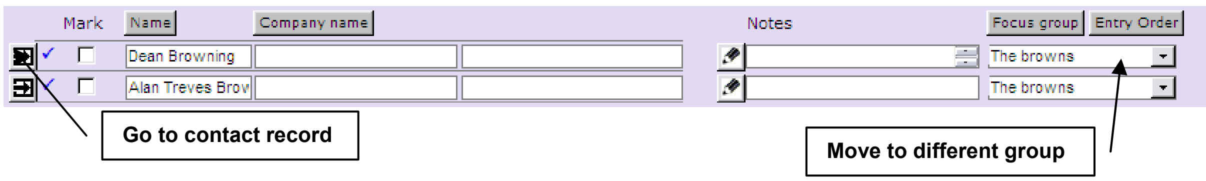
Adding members to the focus group

First, make your selection by searching in the normal way. The panel across the middle will show how many people are due to become members of the selected focus group.



Click **OK** to transfer them.

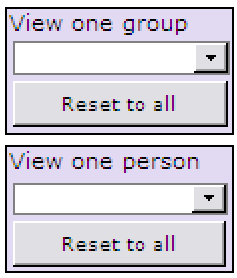
If you don't want to transfer the whole group, double-click the record you want in the transfer, and the membership can be built one record at a time.



Once formed, a focus group can be used for printing, exporting, searching etc, just like any other group on your database.

Changing the display

When you come to this form for the first time, all members of all groups will be displayed. To view any one group, or the groups to which any one person belongs, make your selection by using the dropdowns in the left panel. Click **Reset to all** to see all of them again.

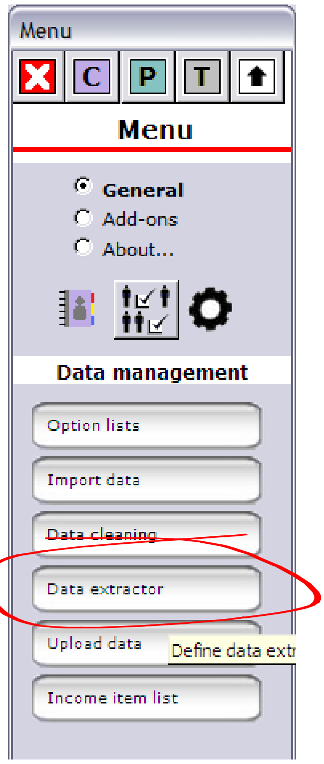


Changing the membership of focus groups

Once the groups have been created and the membership established, they do not have to last forever. You can delete individual members by using the buttons at the bottom of the left panel. By adjusting individual records you can move someone to a different group.

13. Data Extractor

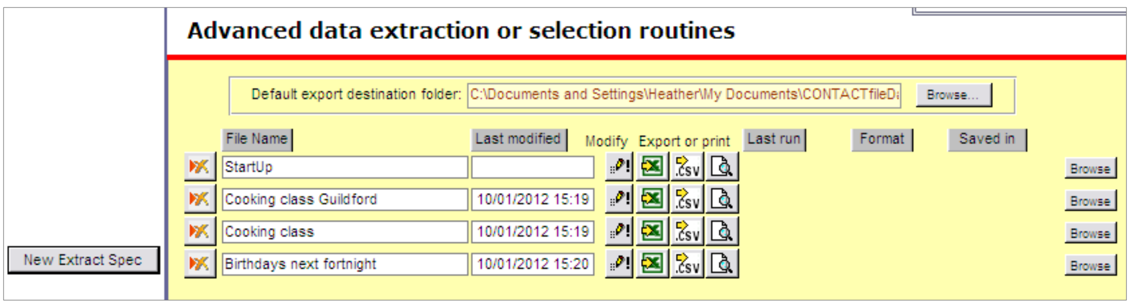
13.1. Overview



In the normal search routines, you can see the results of a great variety of searches. But no search routine can cover all requirements, because some may be complex and/or specific in nature. The advanced data extractor is designed for you to create your own searches (data extraction routines), and then export or print the results whenever they are needed. This option is not available in the Basic version of CONTACTfile.

Click the **'Data extractor'** button on the main menu, or the pencil button on the Contact Manager, and the list of routines is shown. To begin with, only one extraction routine will be listed – 'StartUp'. This one has a particular significance, which we will discuss later.

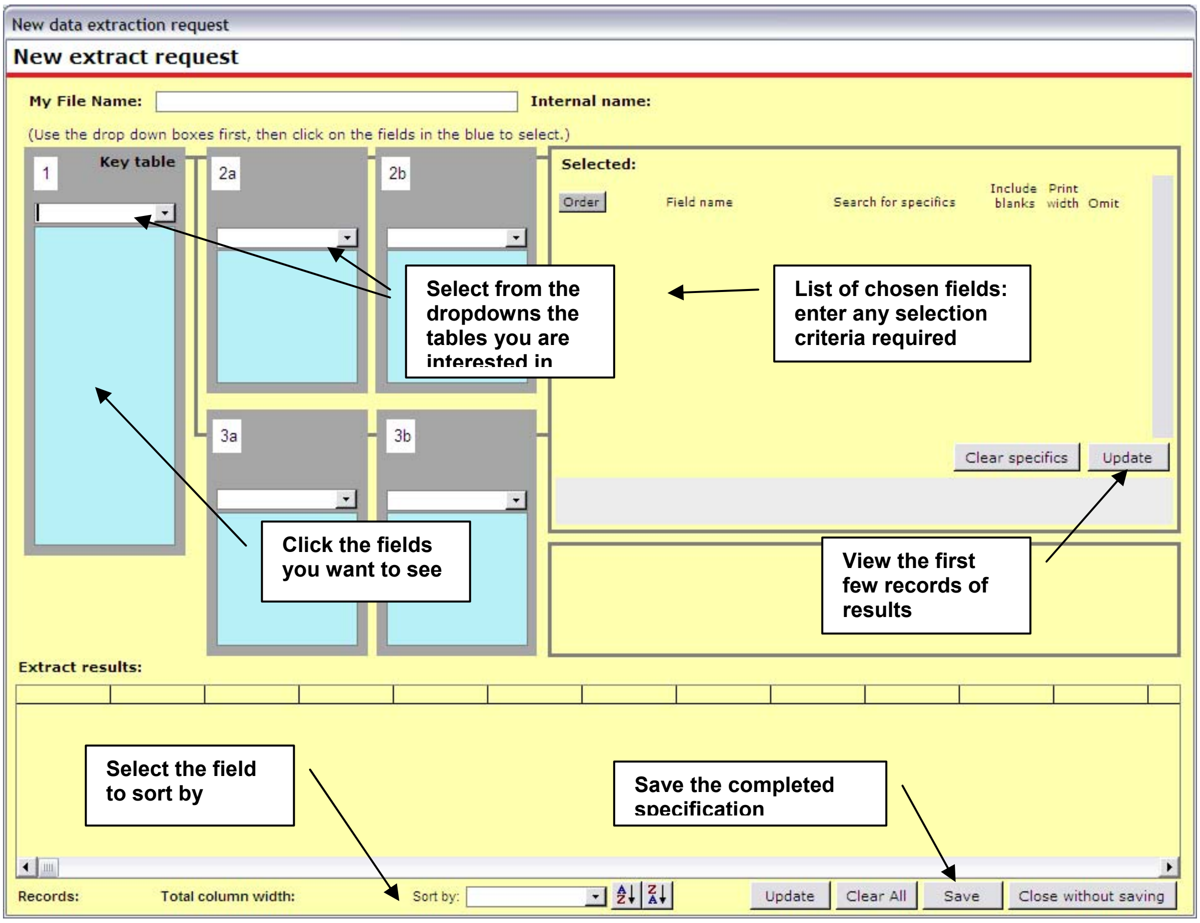
- The **Default export destination** folder is where you would like to save any exported Excel or .csv files that are created as a result of running your data extraction routines. If you wish to change this, click the Browse… button.
- **New Extract Spec** is for you to create a specification to dictate how you are going to extract records from the database.
- **File Name** is a name you give each specification.
- **Last modified** shows when the spec was created or last edited.
- **Last run** is the date and time when the routine was last used for generating an exported file or print
- **Format** is the type of file last generated – either .xls or .csv[9]



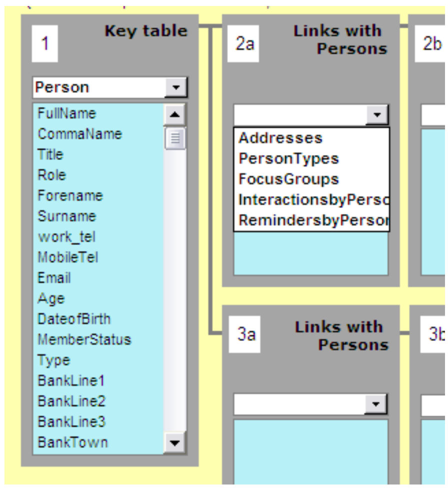
[9] .csv stands for comma-separated values. It is a format that is very useful for transferring data between programs, and is commonly required for uploading data to websites.

13.2. Creating a new extract spec

Click the 'New Extract Spec' button, and the following screen appears.



Selecting tables



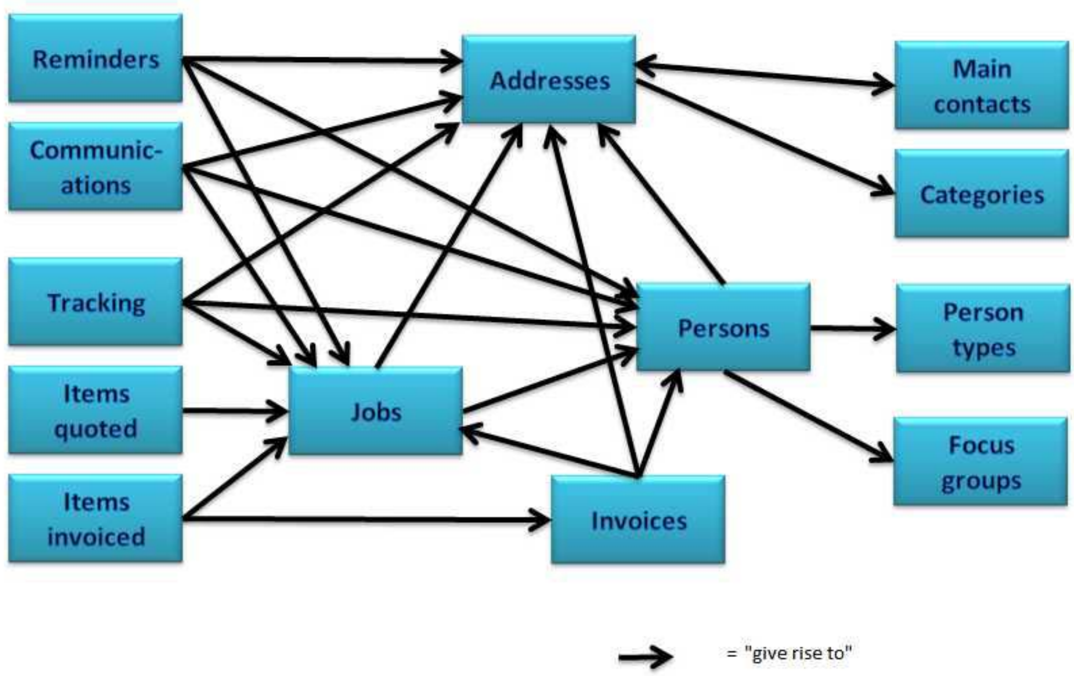
Start by saying which table will serve as the **key table**, then pick your choice of other tables, as needed for the export. The way in which you choose tables will take a little practice, as not all tables are available all the time.

Note that:

- Whichever table you choose as the key table, the records in that table will dictate what will form the rows in the completed extract. So, for example, if you choose 'Person' as your key table, each row in the extract will consist of the data relating to one person.
- The adjoining tables will offer other tables that are linked with the choice on the left. In this example, we are offered three tables ('Addresses', 'Person Types' and 'FocusGroups') in the box on the right, because these are the tables that have data connected with 'Person' on the left.

The diagram below shows how the choice of one table will give rise to other tables in adjoining drop-down options. Here, the Person table has three arrows which give rise to the related tables.

Diagram showing the relationship between tables offered for the advanced data extractor



Example

Let us imagine that we need a list of landline numbers belonging to all people for whom we have a birthday reminder coming up, in the next month. For this, we will require the tables 'Reminders', 'Persons', and 'Addresses' (we will need Reminders for the birthday, Persons for the person's name and Addresses for the telephone number.) Quick reference to the diagram above shows that we will need them in the order stated, with Reminders set as the key table.

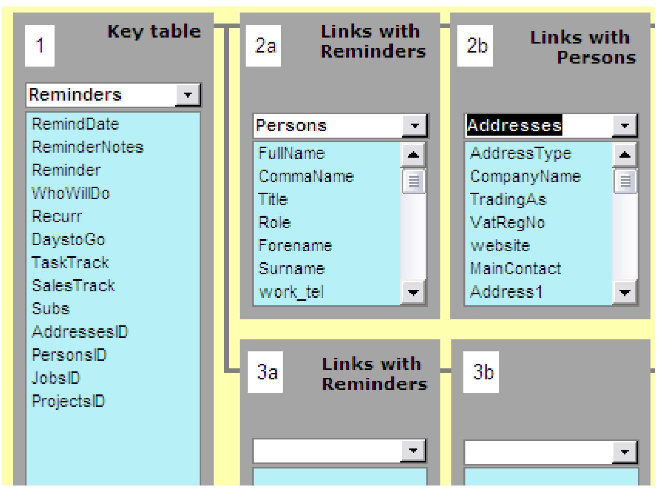
Selecting Fields

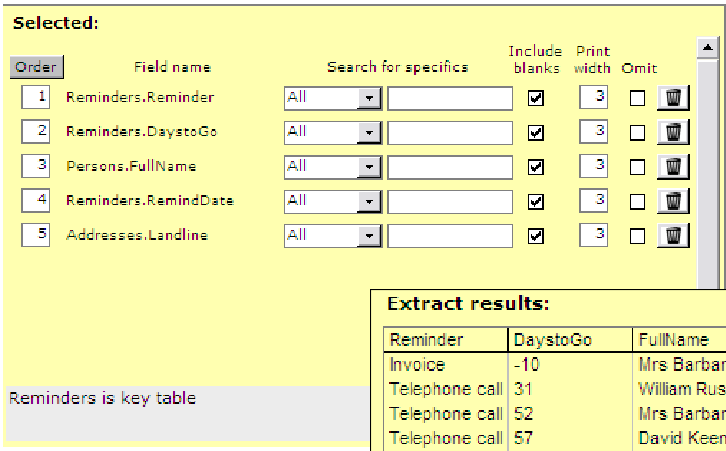
The choices of tables, once made, will show the fields available beneath. The columns (fields) can be chosen by clicking once on each, in the order that you need them.

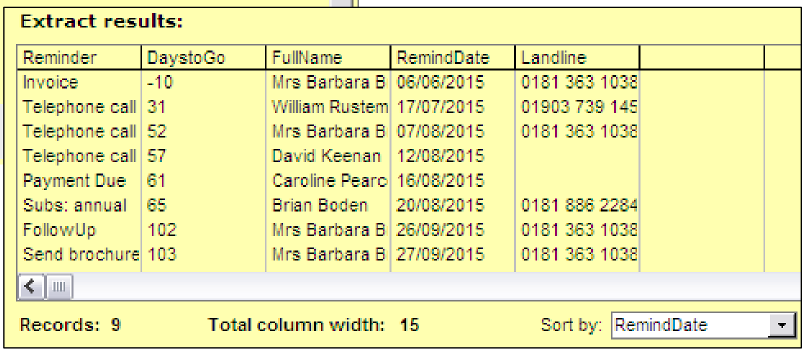
Example:

In our extract, we require a list of dates in chronological order, with the name of the person whose birthday it is and the landline telephone number. We will also need the reminder type and the number of days until the birthday, in order to choose the birthday reminders that we need.

The chosen fields are displayed in the section on the right. At the same time, the first few rows of the finished extract are displayed underneath.







Enter selection specifics

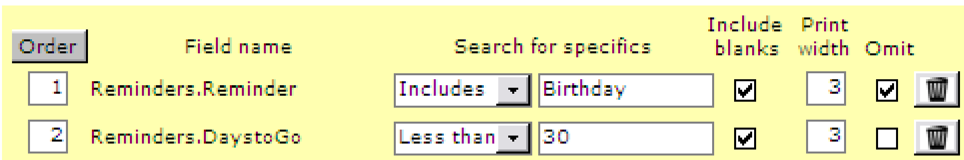
Sometimes you won't need all the records that are presented, only those that interest you. Define the way in which the records should be selected by typing your requirements in the 'specifics' box. Choose from the dropdown to the left of your selection criteria so that it matches the way you'd like it to function.

Example:

It's easy to see that the resulting list doesn't give us what we need, the birthdays, as other kinds of reminders are included too. To solve this problem, type 'birthday' in the specifics against the Reminder field and tick 'Omit' to exclude it from the extract. Click 'Update' to refresh the extract sample.

Notice that the 'All' entry changes to 'Includes', and that the title for the extract spec changes from 'Reminders' to 'Reminders_ReminderLikeBirthday' to reflect the job that it's doing.

Finally, we need to select the birthdays coming up in the next month. This can be done in a similar way, but we need to ensure that only records where there are less than 30 days to go are selected. Note the title is now 'Reminders_ReminderLikeBirthdayDaystoGo<30', to reflect the job that it is now doing.

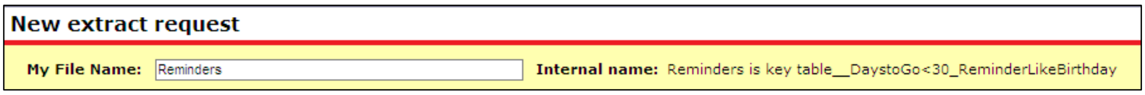


Sorting

To sort the records, choose the field from the 'Sort by' dropdown, and then say whether the sort is to be Ascending or Descending.

Saving

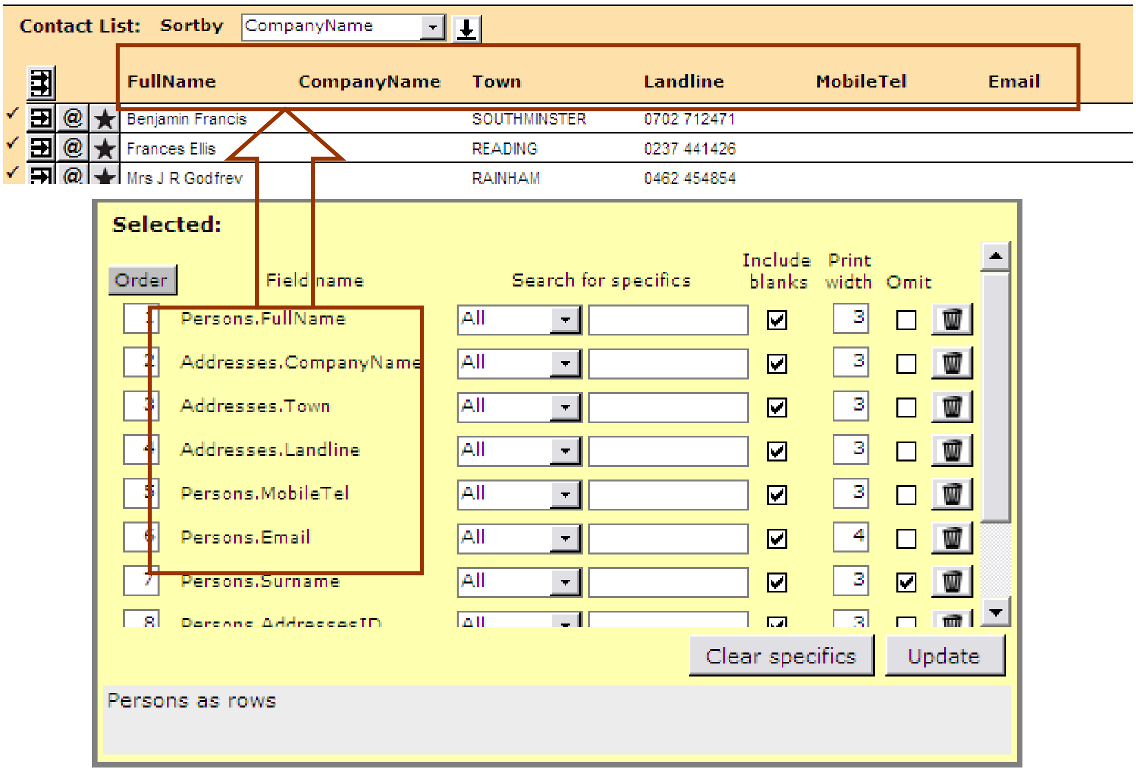
At the top of the form, two names are shown. The one on the right been automatically-generated. Automatic specification names are different for each one, and will identify what the routine is doing. The one on the left is for you to type a more suitable name of your own.



At any time, the extract spec can be saved by clicking the 'Save spec' button. It will automatically be saved using the automatic specification name. Once saved, you will automatically be returned to the main advanced data extraction form.

13.3. The StartUp routine

One of the extract specifications has a special purpose – it is used to dictate the columns that you see on the contact manager.

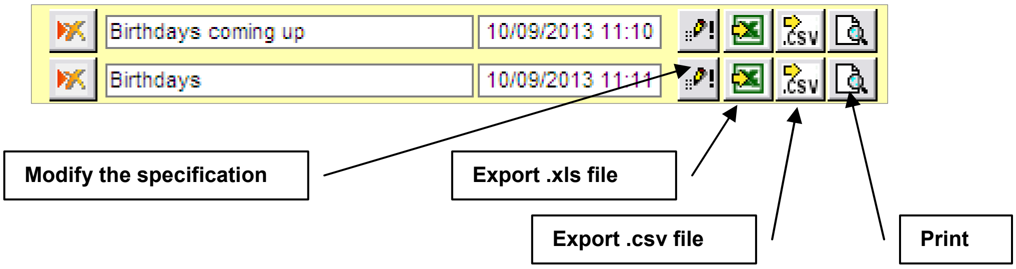


So changes made in the StartUp routine will also affect the columns you see in contact manager. This can be very useful, but take care! These are the rules:

- Keep the ID fields untouched
- Don't include any selections, as this will effectively remove everyone outside your selection from all searches in the contact manager too.
- Don't include any tables that groups unless you ensure that the specification also includes those who are not members of any group.
- Be sure you can restore it to how it was - carefully record the original settings.

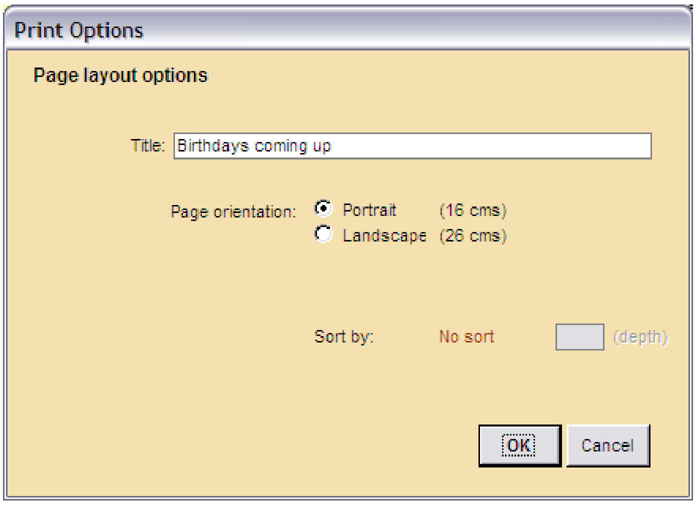
13.4. Exporting

Once the specification is completed you can ‘Run’ the routine and place the results in an external file. To export to Excel or .csv[10], click the appropriate button against the extract spec you require. With either of these exports types, confirm or edit the file name offered, and click OK. The date and time of the last run will automatically be recorded, alongside the type of file produced.



13.5. Printing

To print, click the print preview button against the extract spec you require. A dialog is presented that asks you to confirm the title and page orientation. Edit the title if necessary, and click OK.



[10] .csv stands for comma-separated values. It is a format that is very useful for transferring data between programs, and is commonly required for uploading data to websites.

14. The project manager

When add-on modules are included in your purchase, you will have the project manager available to you. It can be displayed by clicking the P button on the main menu.

14.1. Overview

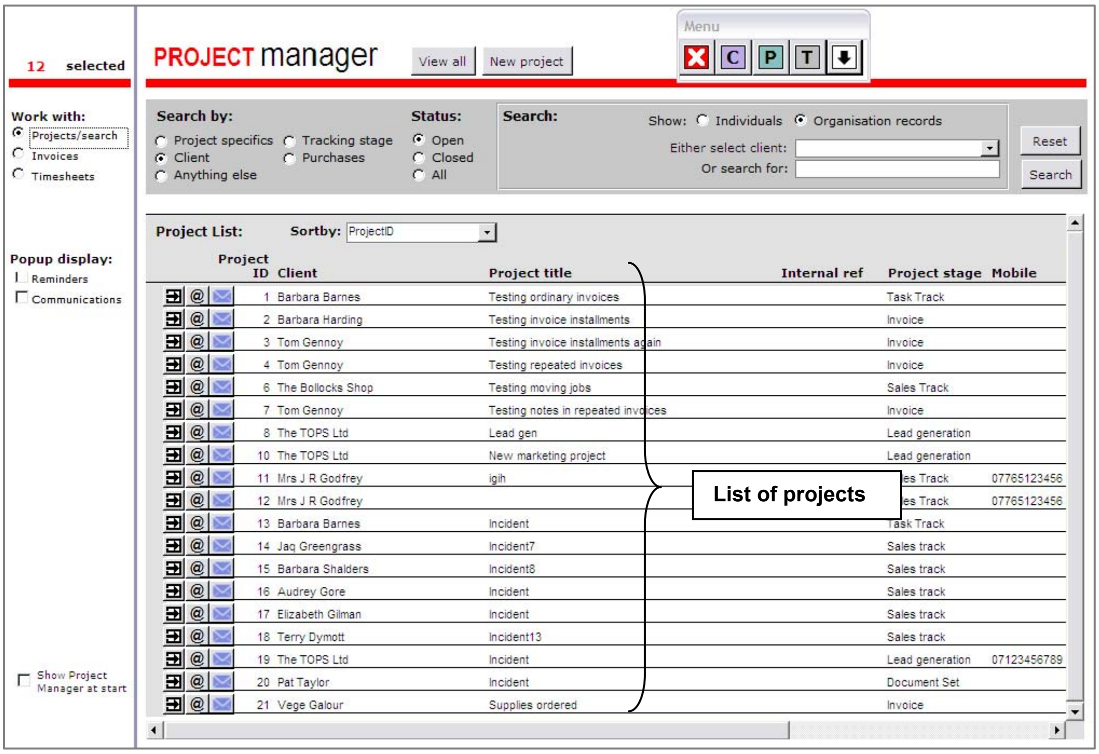
The Project manager is provided for you to carry out all the things you regularly need to do to keep your business running. You can:

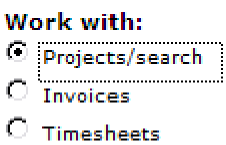
- Create a new project
- Search projects according to your own criteria

And if you have the invoicer add-on module, you can

- View invoices
- View timesheets
- Produce printouts relating to the current view.

Below is an image of the project manager with projects listed; if you open it before creating any projects, the list will be empty. As you create new projects, they will be added to the list, with each project taking just one row of the display.

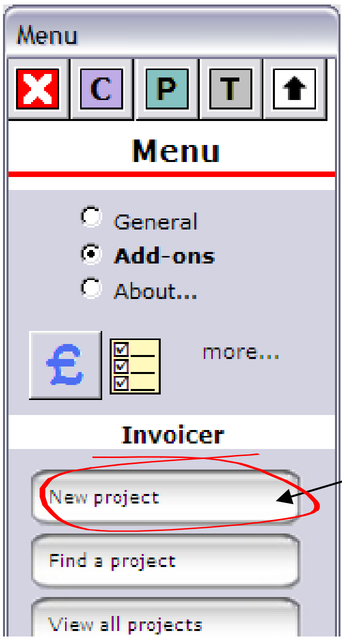


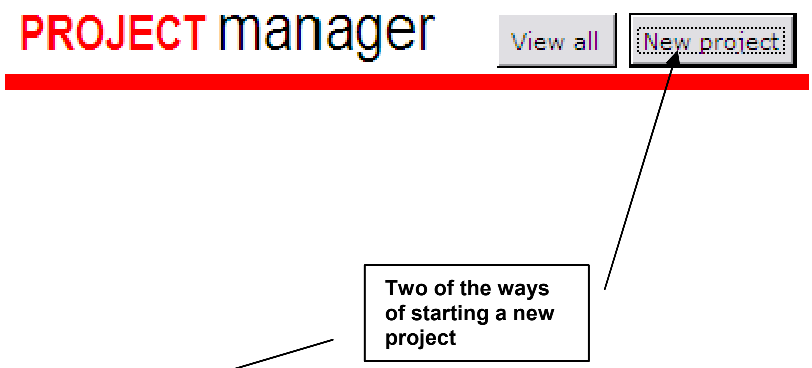


The project manager consists of an area across the top for searching, a panel down the side for additional features, and a main section in the middle that lists the results of your search. If you change the 'Work with' option at the top of the left panel, the list in the central area changes accordingly.

14.2. New project

When you first want to quote and/or invoice someone, start a new project. This can be done from the project manager (see later section) or from the contact record, by clicking the 'New project' button, or from the main menu. Whichever method you choose, a New Project Settings form will be displayed.

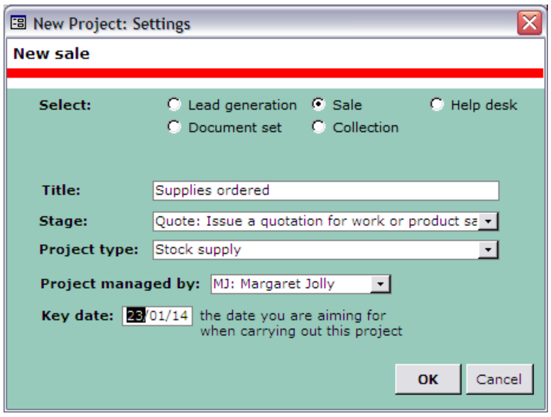




In the new project settings dialog, there may be several options across the top to select from, depending on which add-on modules you have chosen. For sales tracking, quoting and invoicing, and task tracking, ensure 'Sale' is selected.

Some of the boxes may be filled already with the defaults you supplied during setting up.

- Enter a title
- Decide how you want to start the project – sales tracking, quoting, invoicing, or task tracking
- Provide a project type
- Say who will manage the project
- Give a key date (usually the date you want to work to, maybe for completing the work. Double-click to enter the date by which the quotation has to be accepted, or the invoice paid – in this case, 10 days from today.



14.3. Choosing your client

A project cannot exist without a client. But if you started the new project from the Project manager, the system won't know who your client is. When the client is unclear, a dialog will ask you to choose from those previously entered into the CRM system.

If you know the client by the company name, ask to show the list by 'Addresses'. If you know the client by his or her name, then choose people. Type letters from the name you are looking for, and click Go. The names that fit your selection will be displayed below. Choose the address or person you want by clicking on it.

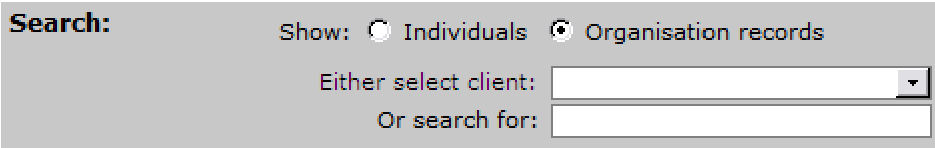
Sometimes, if you choose to view Addresses, there may be several people who could be named as your client. CONTACTfile needs you to choose at least one. Whenever this is the case, you will need to choose from a second list, which shows the list of people working (or living) at the same address.

When you have chosen your client, the new project form is displayed; see the section that matches the stage of project you have chosen for further detail.

14.4. Searching

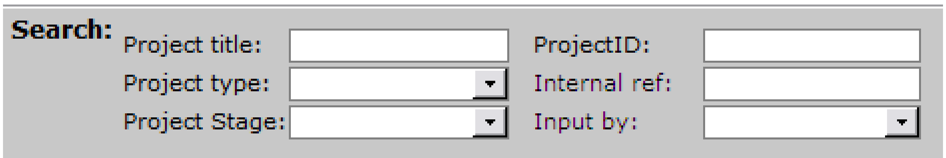
The searching impacts on all three types of display. For each type of search, press [Enter] or click 'Search' to carry out the search you have set. If you need to restore the full list, click the 'View all' button at the top of the screen.

Client: searching for a particular client is the default setting. Choose your client from the dropdown list of existing clients, or type part of the name of the person or company name into the search box.

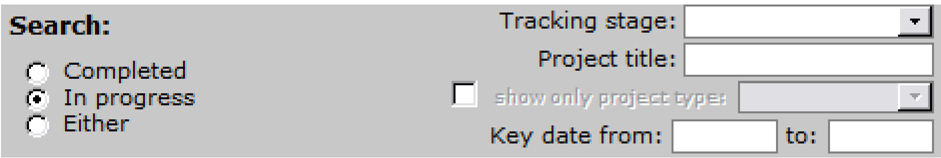


Project specifics: here you can initiate a search by:

- type in a few letters from the project title, or
- choosing a particular project type, or
- selecting a project stage (sale track, quoting, invoicing etc)
- entering the number of one projected
- typing a few letters from your internal reference
- selecting who entered the project into the database

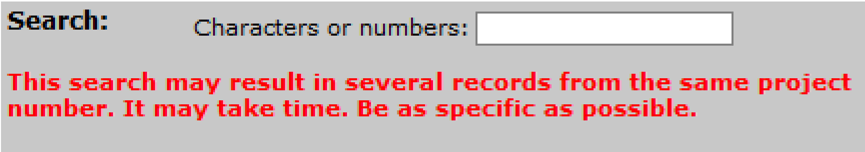


Tracking stage: this is only available if you have purchased the Tracker add-on module. Here, you can search the list of things you did in relation to a particular project or selected projects. For example, if you want to see all the projects where a meeting is planned but not taken place, this is where you would see the results. Note that before filling in the search details, the list of projects will seem duplicated.

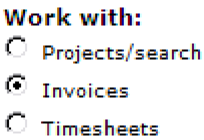


Purchases: this is only available if you have purchased the Invoicer add-on module. Here, you can search for items that clients have bought from you, and find who has bought what.

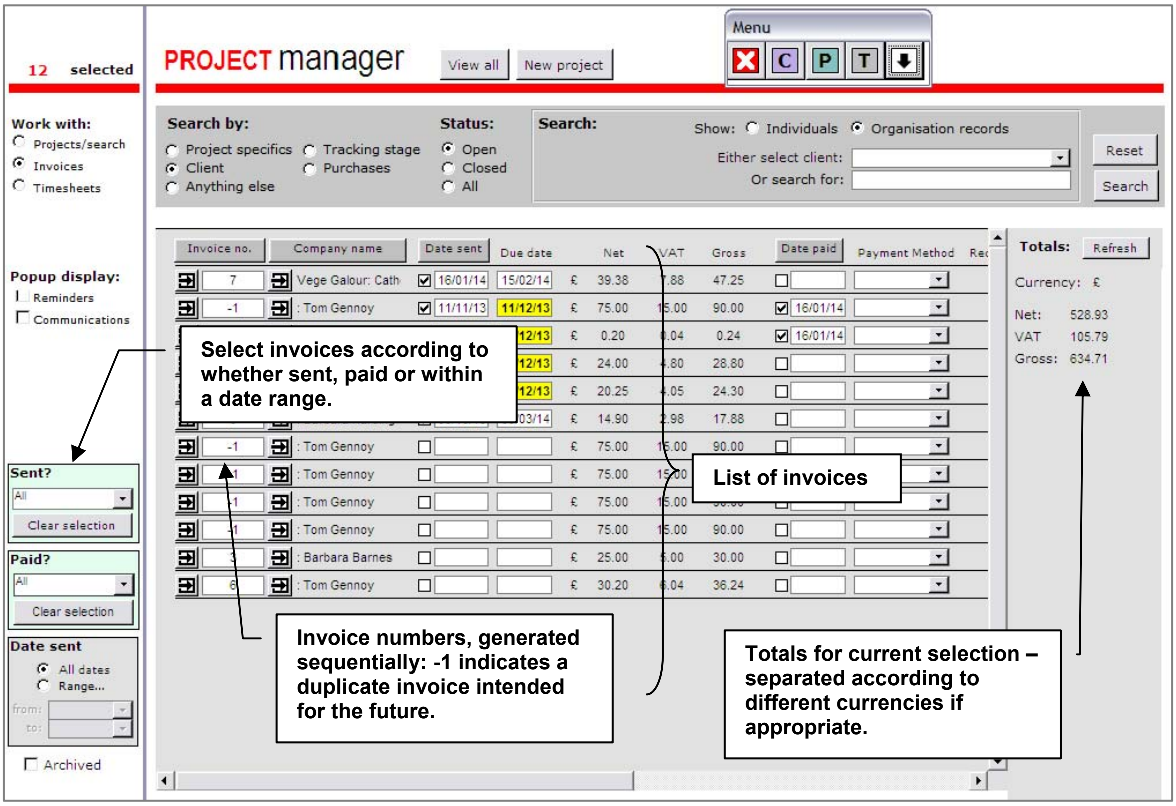
Anything else: type letters or numbers of what you are looking for. Try to be specific, because otherwise you could be presented with a very large number of results. Only data connected with projects will be searched; if you require data connected with contacts, you should use the similar feature on contact manager.



14.5. Invoices



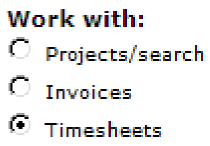
This option will only be available for those who have purchased the 'Invoicer' add-on module. When chosen, the central panel displays a list of invoices instead of a list of projects. The searches across the top remain functionally the same, but the results will be in terms of invoices instead of projects.



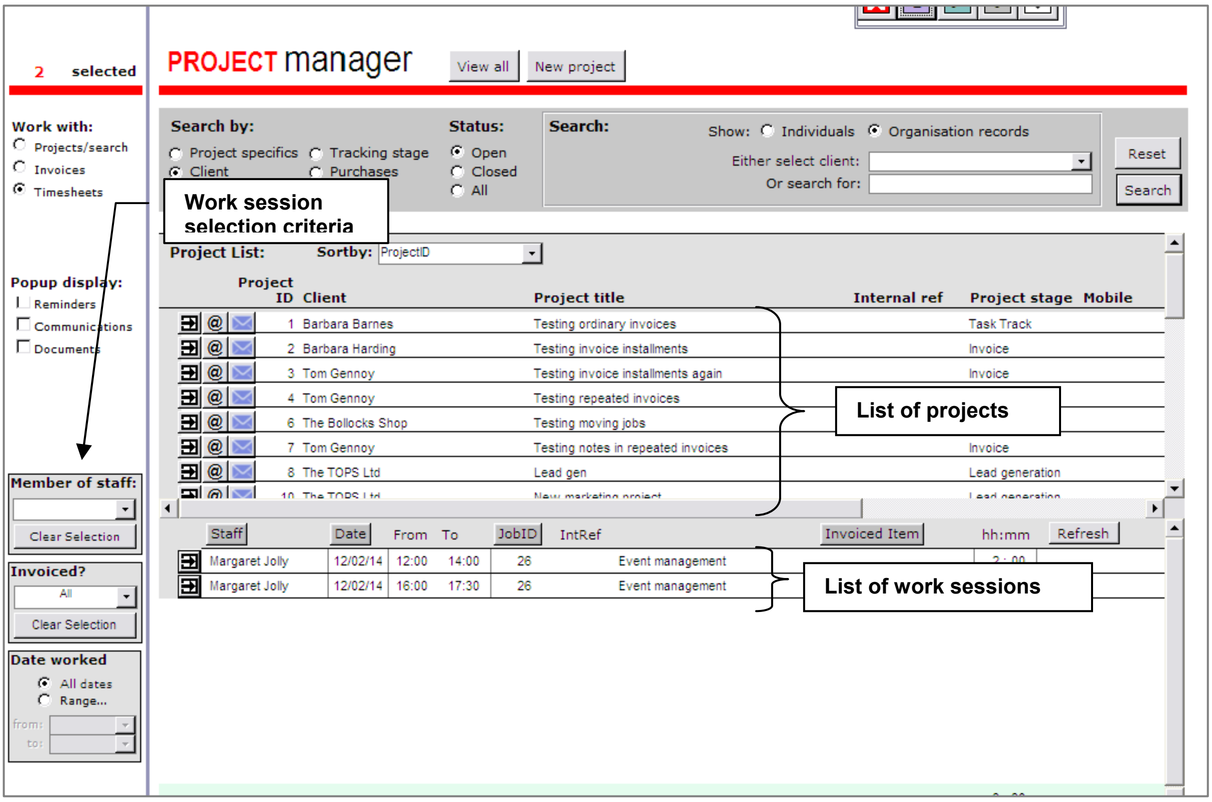
Also use the options in the left panel to further separate invoices depending on whether they have been sent, paid, or whether the sent date is within a certain date range.

A click on the 'view more' button on the left edge of the invoice record will take you to the project that produced the invoice. A click on the other 'view more' button will take you to the client's contact record.

14.6. Timesheets



This is available only if you have the 'Invoicer' add-on module. At the top left of the Project manager, choose to **work with** Timesheets. The main section is then reduced in size, to provide space for the lower half to show a list of work sessions.



The searches across the top remain functionally the same, but the results will be in terms of work sessions instead of projects.

Also use the options in the left panel to further separate work sessions depending on whether they have been invoiced, carried out by a particular member of staff, or whether the date worked is within a certain date range.

14.7. Printing

Lists

Select 'List' from the Printing section of the 'Tools'. The printing will consist of the list on display.

One invoice

Invoices can be printed from directly from the project that produced them, or from the invoice list. Select 'One invoice' in the Printing section of the 'Tools'. This will present the invoice dialog, which allows you to choose from several invoices within the project (if appropriate) and to change how the invoice looks.

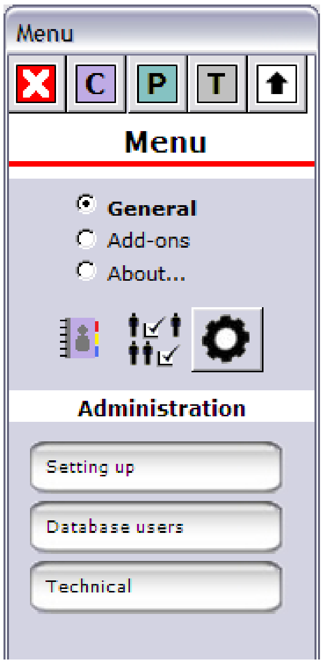
15. Invoicer

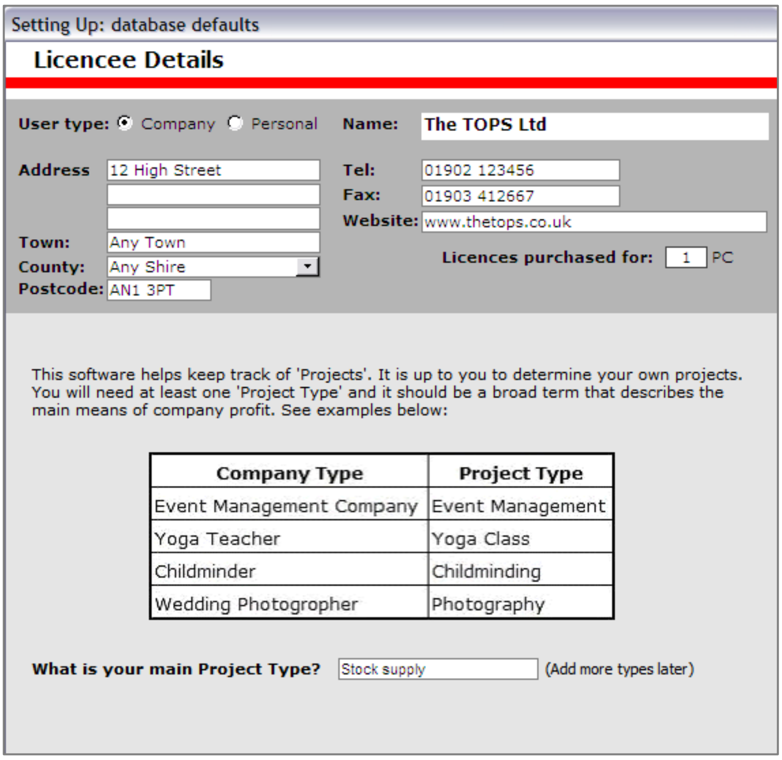
The Invoicer add-on provides all you need to produce quotations and invoices, and to keep track of these after they have been issued.

If you have also purchased the 'Tracker' add-on module, you will need to give some attention to this alongside the Invoicer module. Since some CONTACTfile users will not have purchased both modules, the notes for Tracker and Invoicer have been written separately.

15.1. Setting up

When you first used CONTACTfile, you will have been taken through the Setting up automatically. Now, if you need to return to this, there's a button in the Administration section of the main menu. Otherwise, you will be offered the Invoicer options immediately after the stage where you enter your groups.



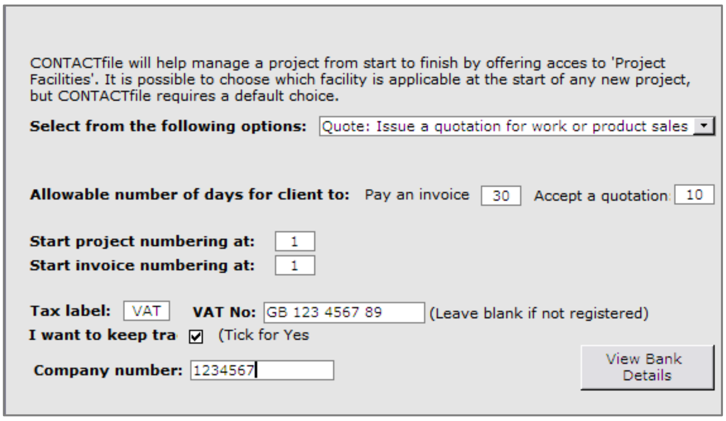


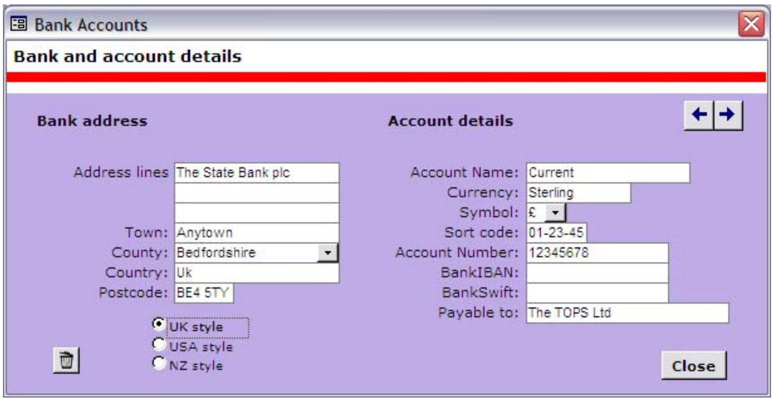
The first option screen asks you to supply a Project Type. A project type is a broad description of the work you do, and the main means by which you earn money. Enter the main one; you can add more later.

The next question requests a Project Title. The project title is the default text that will be printed at the top of every quotation and invoice that you send to your customer. You can change this for each project you do at any time.

The last of the Invoicer setting up screens asks for details of how you want to work financially. Choose how you want a new project to start (Quoting or Invoicing) and answer the other questions as appropriate.

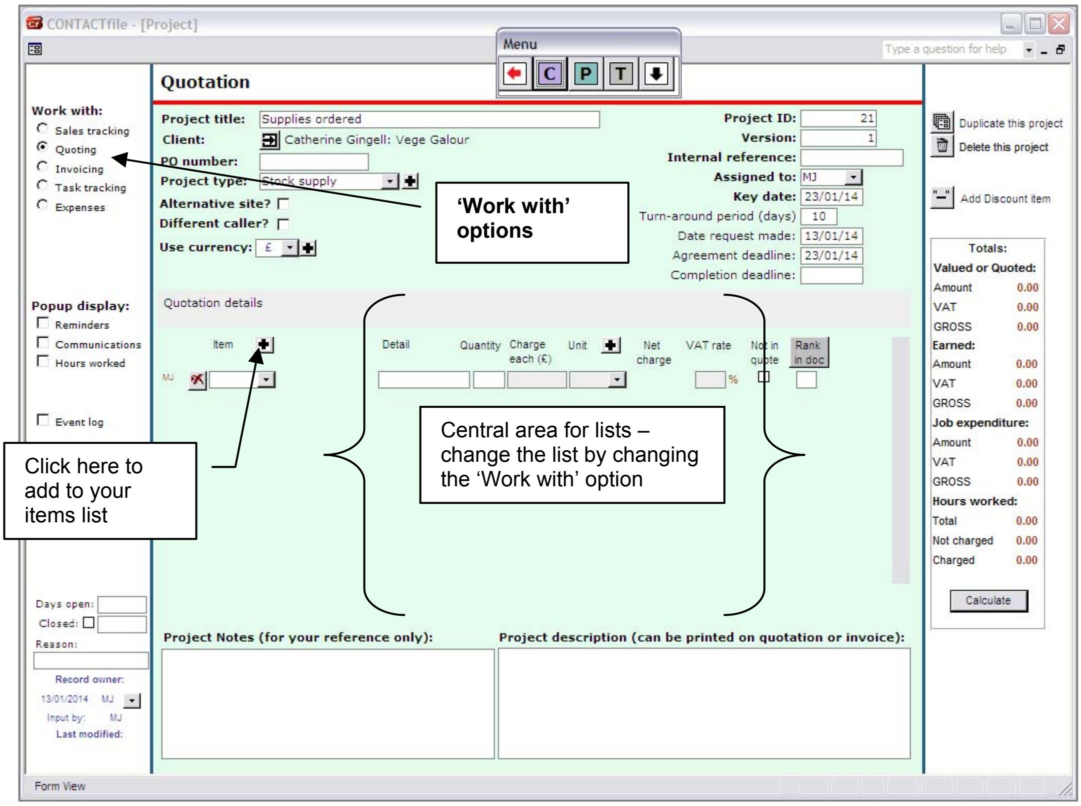
If you want your bank details to be printed on the bottom of an invoice, click ‘View Bank details’. You don’t need to fill in all the fields – just the ones you’d like to have printed.





15.2. The new project screen

Follow the instructions for creating a new project in the section about the Project manager. Once created, this is how the new project screen looks before entering any more data. It



consists of two main sections. The areas around the outside carry the project specification and the central area carry the lists (which in this example will hold the quotation items). You can change what you want to work with by choosing from the options at the top-left corner of the screen. If you want to build an invoice, for example, select 'Invoicing' from the work with options, and the central area will then display a list of invoice items.

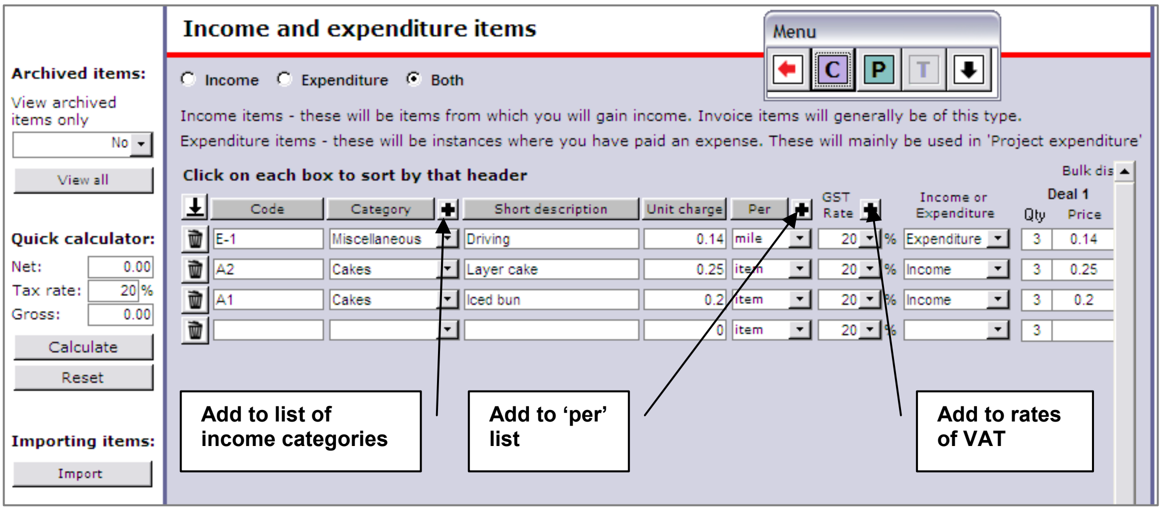
Any of the boxes can be edited here:

- Most of the boxes can be simply edited. If you have changed your mind about the title, for example, simply change it to what you want.
- If you want to change your mind about the client, double-click the client name – but you can only do this whilst you have no invoice items listed.
- If you will be working on a different site to the one given for the client, tick the box 'Different site?' and then choose the site and your contact there in the same way as you choose for the client.
- If the person who called you to request the work wasn't the client, tick the box 'Different caller?' and choose the address and the person calling.
- The totals quoted and earned can be updated by clicking the 'Calculate' button.

15.3. Items list – items of income and expenditure

Once you have set the main details for the project, you will want to build a quotation or invoice that consists of the items that will eventually charge for. But before you can do this, you will need to have a list of items to choose from. Click the button (indicated in the illustration) to add items to the list.

The items will list the ways in which you earn (or maybe spend) money. Your list might consist of items of income relating to services or work offered by you to clients, or products sold by you to customers. It may also include items of expenditure relating to expenses or purchasing that are necessary for the task to be completed.



Click the **Items List** button. A short description of each of the items that you sell need to be listed here, with an appropriate code. Fill in each of the columns in turn, using a unique code for each one; the item must be identifiable by the code in every case. If you are VAT registered, the VAT rates will also need to be entered, although a calculated default will be offered.

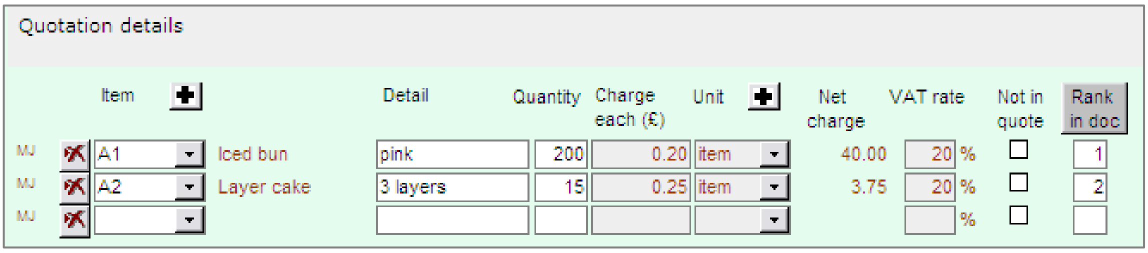
Once listed, these items will be offered for building a quotation or invoice. Although it is possible to delete them again, this is unwise if they have been used in a quotation or invoice; If you don't wish to use them again, archive the item instead.

Click the 'Back' button on the main menu to return to the project screen.

15.4. Quotation items

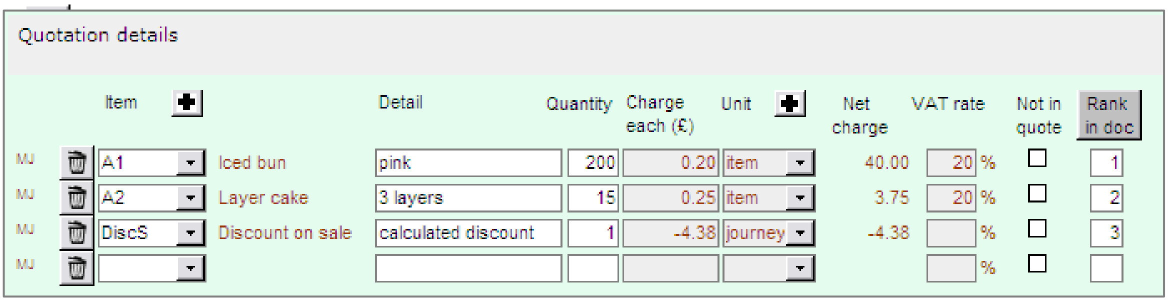
Ensure that you are working with quotations by clicking ‘Quoting’ in the ‘work with’ options at the top of the left margin.

For each item, choose from the drop-down list the item that describes the work done or ordered. To speed up the process, the code of the item can be typed if preferred. Once an item has been selected, the rest of the description will fill in automatically. You can edit the description, and you can use the Detail section to further describe any item. Add further items to the list, as required. There's also plenty of room in the project notes at the bottom to add further description if needed.

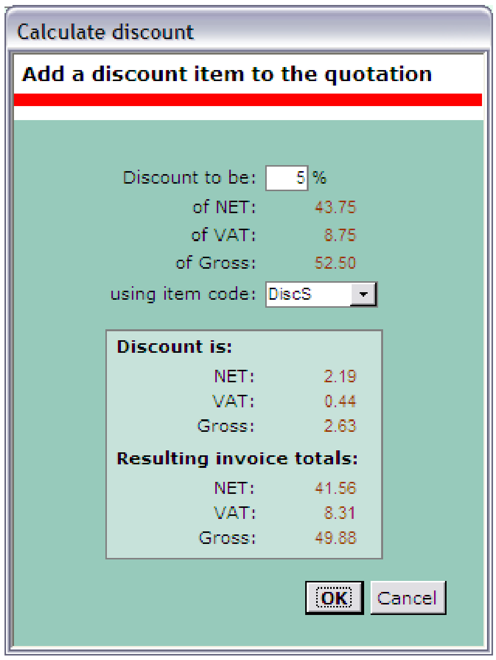


Click **Calculate** (in the right panel), for the totals for this project.

Applying a discount



From time to time, you may wish to offer a discount on your usual prices. A discount item can be added just **once** to your quotation, and reduce the total cost to your client by a percentage amount. It cannot be applied to a quotation after invoice items have been entered. When you have listed all your quotation items, click the ‘Apply discount’ button in the top right panel of the display.



The dialog that is presented has been completed with the totals given in the quotation. Change the percentage of discount that you wish to apply, and the displayed figures will recalculate. When you are happy with the displayed discount, click OK. A further item will be added to in the quotation, using the chosen item code.

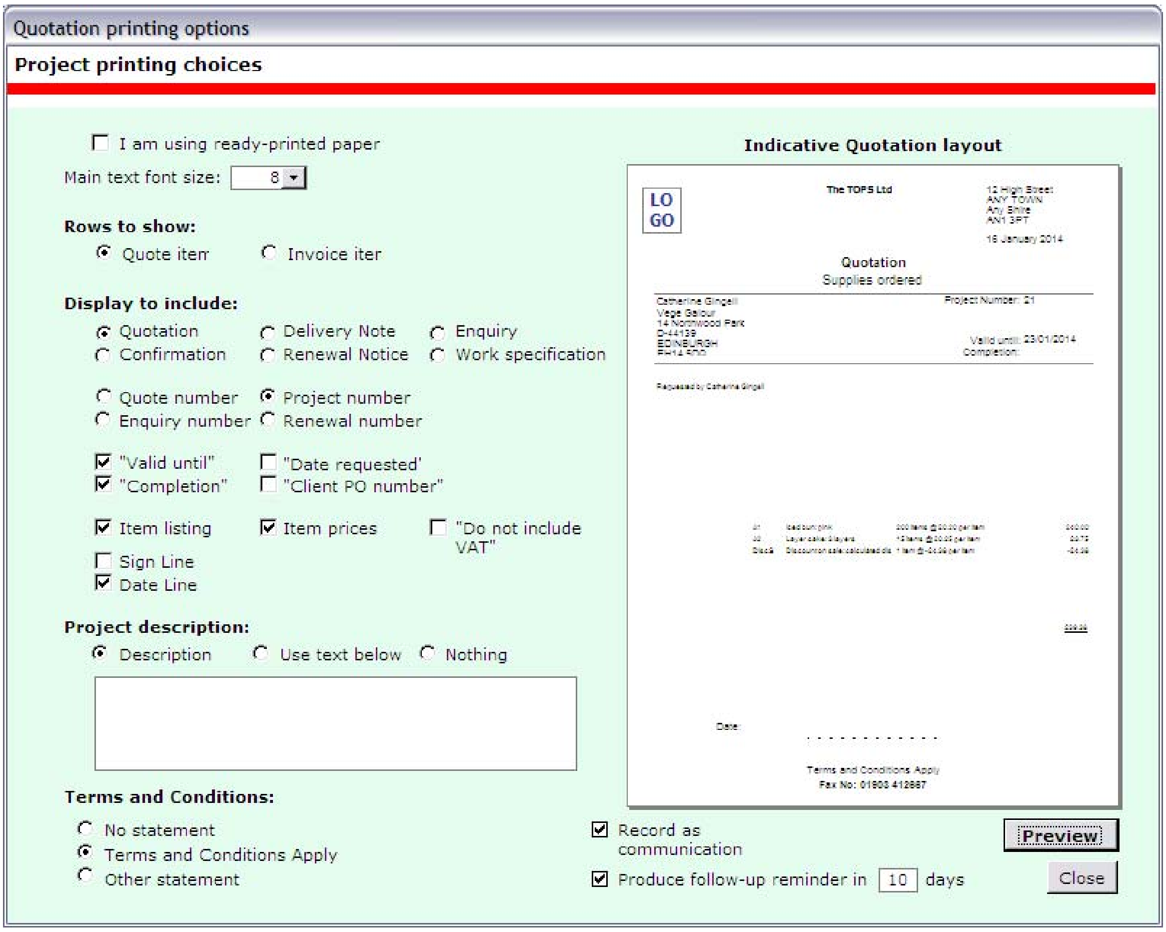
If you chose to use the default item code ‘DiscS’ (rather than creating one of your own) you will see that the item coded DiscS has been added to your income item list the first time of using.

Note that the VAT rate has not been entered, because the VAT amount is calculated by taking a percentage of the total VAT charged in the quote items above, and the VAT rate applied might be not be the same across all items.

Printing the quotation

The project quote items can be printed out for clients in several guises, and a 'quotation' is just one of them. You can print out a confirmation of work, a delivery note, and/or a renewal notice, simply by changing the title! Select 'Quote etc' from the Print section in the Tools, and a Printing Options dialog displays.

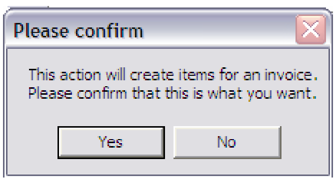
Here, you can customise your project print, so that it prints to your requirements. The left-hand side of the dialog is provided for you to make your choices, and the right-hand side gives an indicative display – a guide to how your print will eventually look. Click or tick your requirements appropriately.



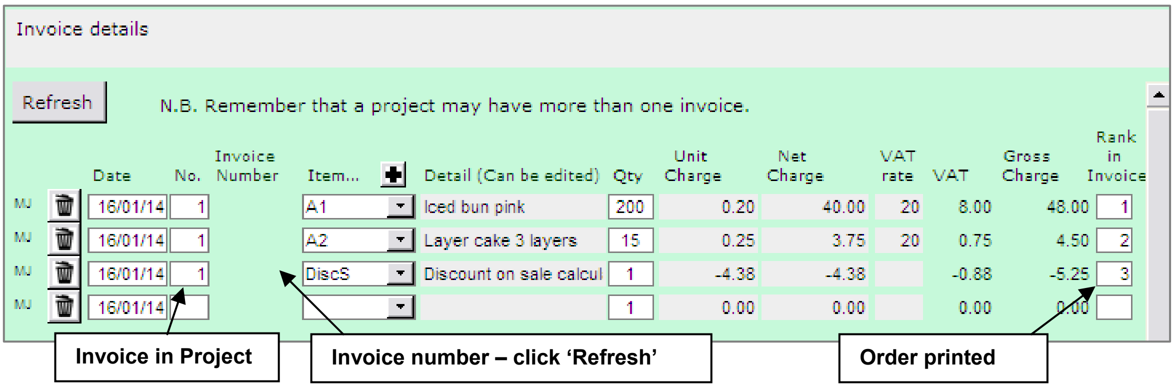
When you are satisfied you have the document you want, choose whether to record this as a communication, then decide whether you would like a follow-up reminder. Click 'Preview' to see the finished report. Once there, you can print it to paper, and/or (if you have Office 2007 or later) print to a pdf, ready for sending electronically.

15.5. Invoice items

Use this to record the items and amounts of money for which you wish to charge the client. Invoices can be produced with or without a quotation. If a quotation has been issued beforehand, the items in the quotation can be used to automatically generate an invoice.



Ensure that you are working with invoices by clicking 'Invoicing' in the 'work with' options at the top of the left margin. If you have previously quoted, you will be asked to confirm the automatic creation of invoice items from the quote items, click Yes and they will be copied automatically, click No and you can enter them separately, probably by building actual charges when work begins.



As part of this process, each item will automatically be allocated three numbers, an 'Invoice in Project' number, an 'Invoice number' and a 'Rank in doc' number.

- The **Invoice in Project** number will be a 1 (one) for every item, to show that all the items will be in the same invoice. If you wish to issue several invoices against the same project, change this number to a 2 for the items in the second invoice, then 3 for the items in the next, etc.
- The **Rank in Invoice** entry is for you to dictate the order of these items on the invoice.
- The **Invoice number** is created automatically by clicking the 'Refresh' button or by exiting this form. It cannot be edited here; to change the invoicing numbering system, work with 'Invoices' on the Project manager. (See later section).

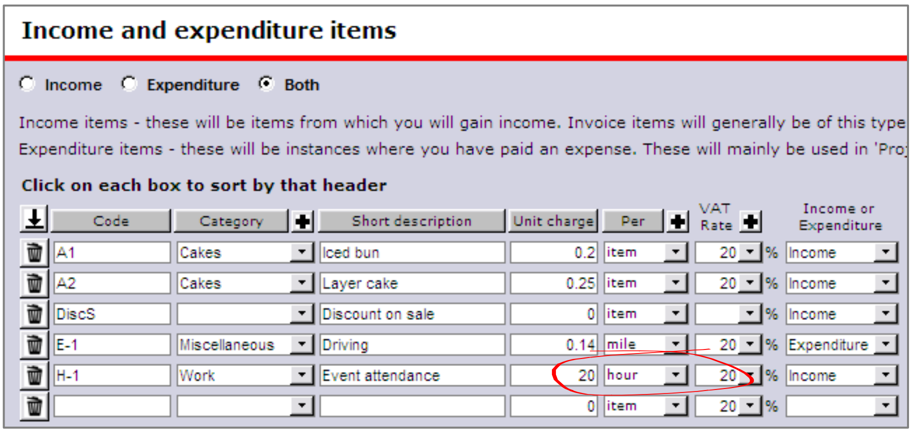
More details about items sold

Scroll the invoice items to the right, and you will see that custom fields are available to record any other facts relating to the item for which you are invoicing. For software sales, for example, you may wish to record software keys issued; for work carried out, you may wish to record any issues you had to deal with. Eleven custom fields are available – 4 text, 4 date, and three numeric. Double-click the heading against the appropriate invoice item to provide them with a suitable heading.

15.6. Hourly working – charging by the hour

Charging by the hour can be applied to:

- The project generally, without the time being charged to the client, or
- any invoice item where the unit charge is made by the hour.



Income and expenditure items

Income Expenditure Both

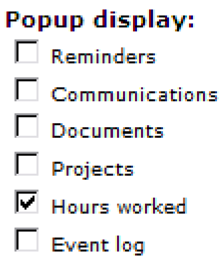
Income items - these will be items from which you will gain income. Invoice items will generally be of this type
Expenditure items - these will be instances where you have paid an expense. These will mainly be used in 'Proj

Click on each box to sort by that header

Code	Category	Short description	Unit charge	Per	VAT Rate		Income or Expenditure
A1	Cakes	Iced bun	0.2	item	20	%	Income
A2	Cakes	Layer cake	0.25	item	20	%	Income
DiscS		Discount on sale	0	item		%	Income
E-1	Miscellaneous	Driving	0.14	mile	20	%	Expenditure
H-1	Work	Event attendance	20	hour	20	%	Income
			0	item	20	%	

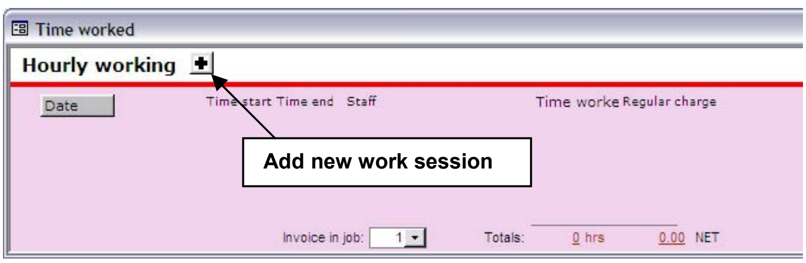
For example, let us image that event attendance is charged at £20 per hour for the first 3 hours, and £10 per hour for bulk bookings exceeding 3 hours (scroll to the right of the income items list to set this).

Recording time spent on a project without it being charged to the client

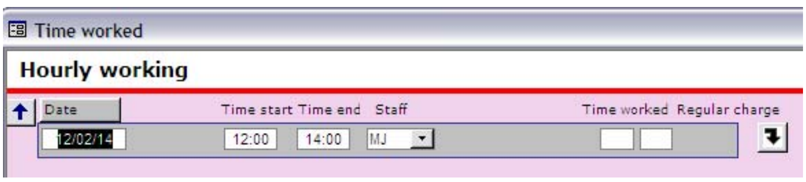


In the left-hand panel of the project form, tick the box to see the popup 'Hours worked'. (If this is not visible, use 'Customise' on the 'Tools' and ask to have it included.)

On an invoice that includes a 'per hour' item, scroll to the right, and click 'Hourly working'. The Hourly working popup will be presented. At the start it will look fairly empty.



To add a period of work, click the 'Add new work session' button.

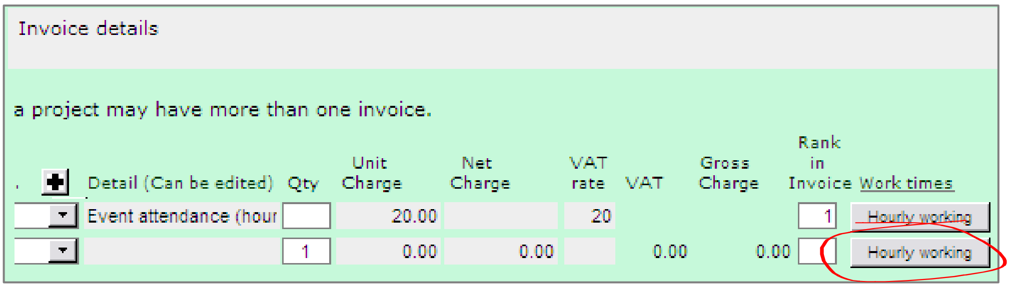


Fill in the date (or accept today's date) and then EITHER supply the start and finish times, OR the hours and minutes worked. Click the bent down arrow to save.

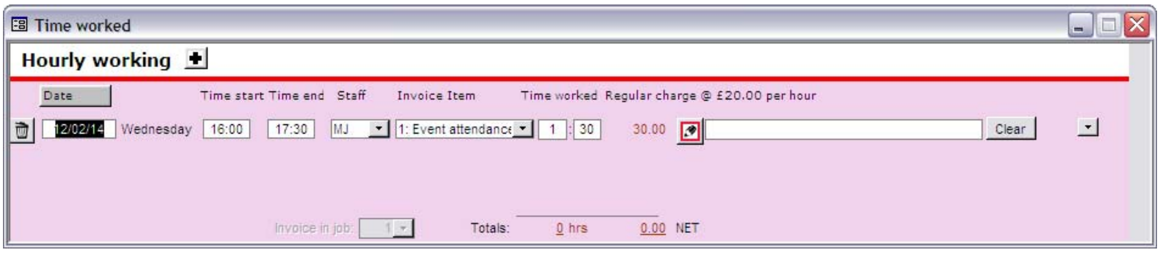
The result will be a record of working that has no connection with invoicing, and which will therefore not be charged to the client. Changes, including notes about the work done, can be made directly to this record.

Work charged to the client

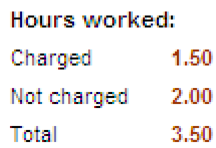
Click ‘Hourly working’ against the invoice item relating to the work being done.



Once again, the Hourly working popup will be displayed, and once again it will be empty. Only spells of working set against this one invoice item will be shown, and so previously-entered spells of working (against the project generally or against other invoice items) will not be included. When a new spell of working is added, in the same way as described above, it will automatically include the fact that the work was connected (and charged to) the chosen invoice item.

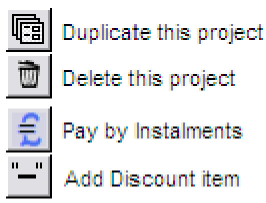


Notice that this record will be included as part of the hours worked on the project. Total hours worked on the project can be displayed by clicking the ‘Calculate’ button in the right panel.



15.7. Pay by instalments / repeat invoices

There are two ways of arranging payment on a regular basis - by instalments and by generating repeat invoices. For either, click via the ‘Break into Instalments’ button in the right panel of the Project form.

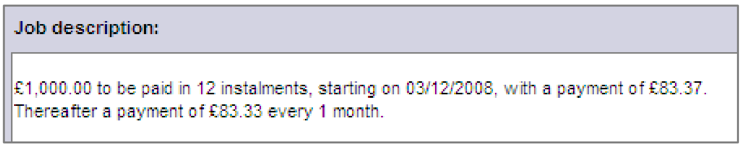


Pay in Instalments

This is the process whereby an invoice is issued once at the beginning of a period, normally a year, requesting that the client pays a given amount at regular intervals. Here, payments are likely to be made using a direct debit or standing order arrangement, and reminders are created to prompt you to check that it has been done.

- Set up the project with the main details in the usual way, and enter the invoice items to cover the whole period. Click **Pay by Instalments**.
- Ensure that the first option, **Divide an invoice amount into parts**, is selected. The form will automatically fill with the (gross) amounts from the invoice item(s) entered for the last invoice-in-project. Here, we have £84 to be divided into 12 monthly payments. Modify the entries if required.
- Click **Create Instalments**.
- Note that the first payment will take the excess amounts where the division will not result in complete pence.
- The lower half will then fill with the instalments due.
- **Close** the Create instalments dialog.

A description of the payment schedule can be automatically placed in project description, for printing on the invoice if required.



Repeat invoices

To issue several invoices at regular intervals, each demanding the next payment in a series of similar payments.

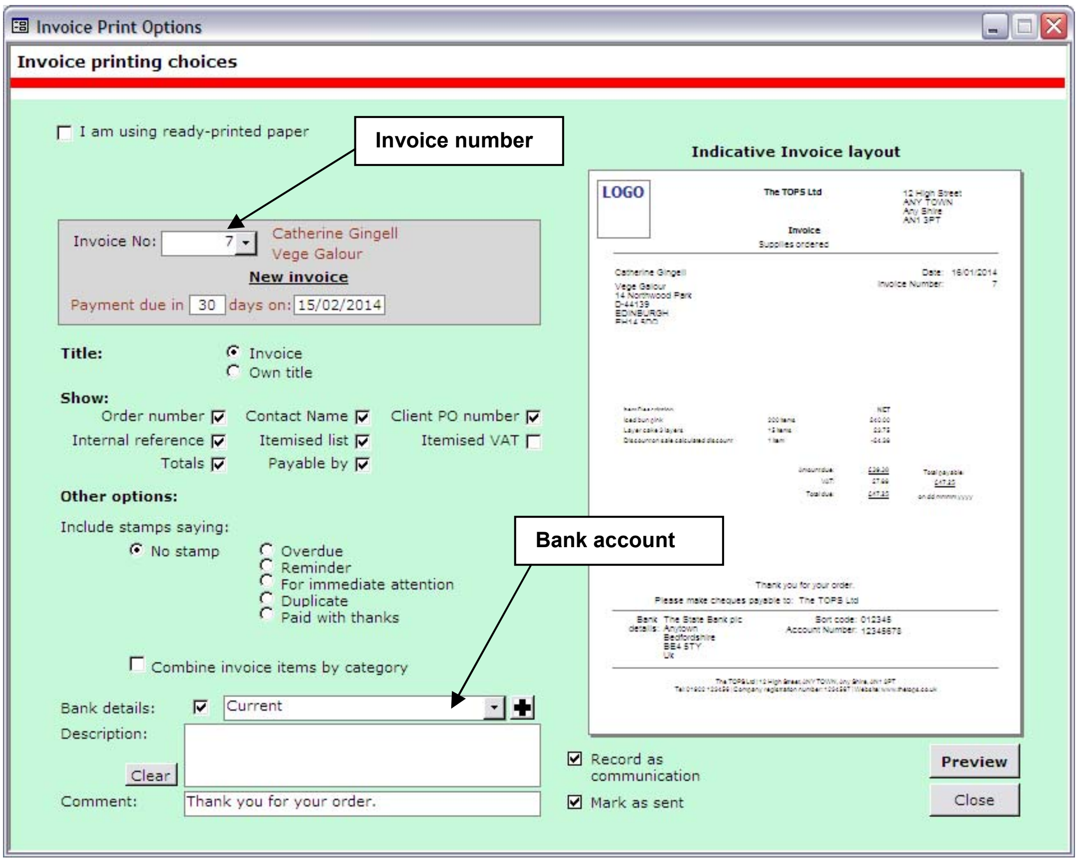
- Set up the project with the main details in the usual way, but do not enter any invoice items. Click **Break into Instalments**.
- Ensure that the second option, **Divide an invoice amount into parts**, is selected.
- Select the item required from the drop-down list, and the form will automatically fill with the (net) amounts from the invoice item(s) entered. Here, we have £1,000 to be divided into 12 monthly payments. Modify the entries if required.
- Click **Create Repeat Invoices**.
- Note that the last payment will take the excess amounts where the division will not result in complete pence.
- The invoice items will then be added to the project form. **Close** the instalments dialog.

A description of the payment schedule can be automatically placed in project description, for printing on the invoice if required.

Note that invoice numbers are not created immediately, but if they are left empty they will be filled when a project is next opened.

Printing the Invoice

Once charges have been entered, an invoice can be printed. The **Invoice** button in the left panel of the project form results in a printed invoice for this order. When you click the **Invoice** button in the Print section of the left panel, the following dialog displays:



Select the invoice you require from the dropdown menu (if necessary) and select the bank account to be used for payment. Decide whether you would like to include different items on your invoice, and tick the checkboxes for the ones you require. You can also say whether the invoice requires a stamp, which will be printed in bold lettering on the invoice. When you are satisfied you have the document you want, click 'Preview' to check before printing.

When you produce an invoice, it will automatically be included in your list of communications and will be marked as sent. If you do not require either of these things, deselect the 'Record as communication' checkbox and/or the 'Mark as sent' checkbox, as appropriate.

16. Tracker

The Tracker add-on module offers the organised way to keep track of projects and projects, by offering an integrated reminder system that creates an up-to-date To Do list.

If you have also purchased the 'Invoicer' add-on module, you will need to give some attention to this alongside the Tracker module. Since some CONTACTfile users will not have purchased both modules, the notes for Tracker and Invoicer have been written separately.

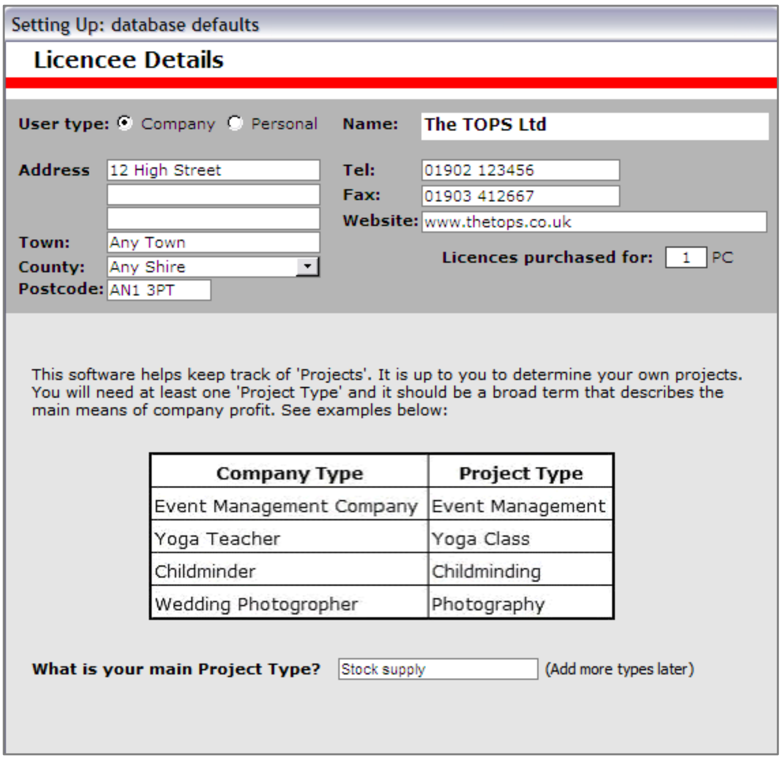
It consists of three main functions, each of which track in a different way:

- **Lead generator**: To keep track of what you need to do between you and a group, to lead them towards buying your services.
- **Sales Tracker**: To keep track of what you need to do to secure a sale.
- **Task Tracker**: To keep track of what you need to do to carry out a project, once secured.

These are tackled separately later on, after we have looked at setting up.

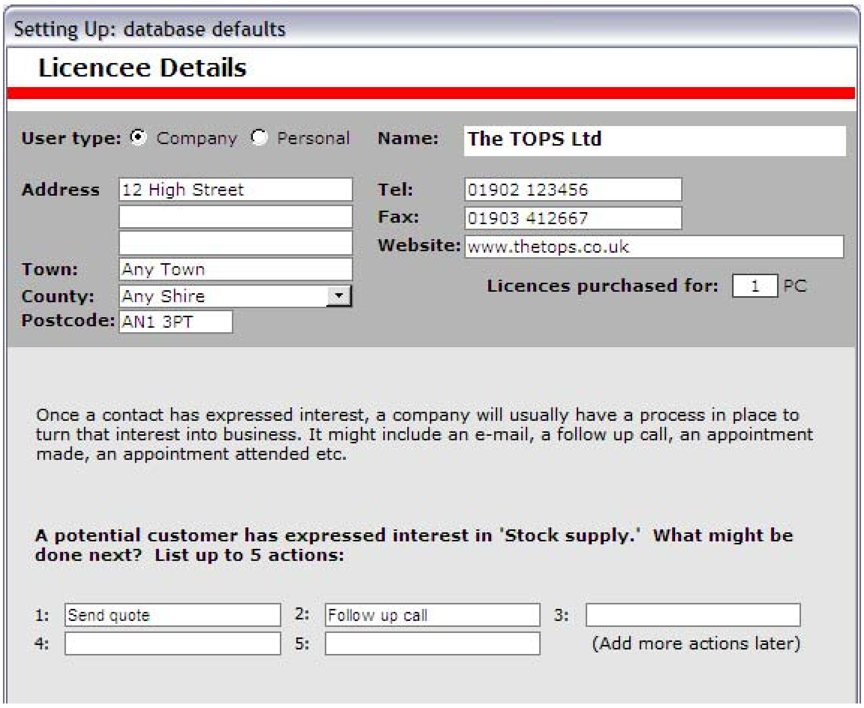
16.1. Setting up

When you first used CONTACTfile, you will have been taken through the Setting up automatically. Now, if you need to return to this, there's a button in the Administration section of the main menu. Otherwise, you will be offered the Invoicer options immediately after the stage where you enter your groups.



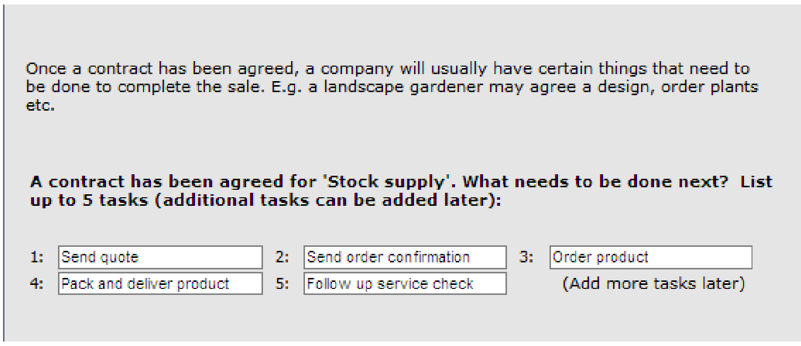
The first option screen asks you to supply a Project Type. A project type is a broad description of the work you do, and the main means by which you earn money. Enter the main one; you can add more later.

The next question requests a Project Title. The project title is the default text that will be printed at the top of every quotation and invoice that you send to your customer. You can change this for each project you do at any time.



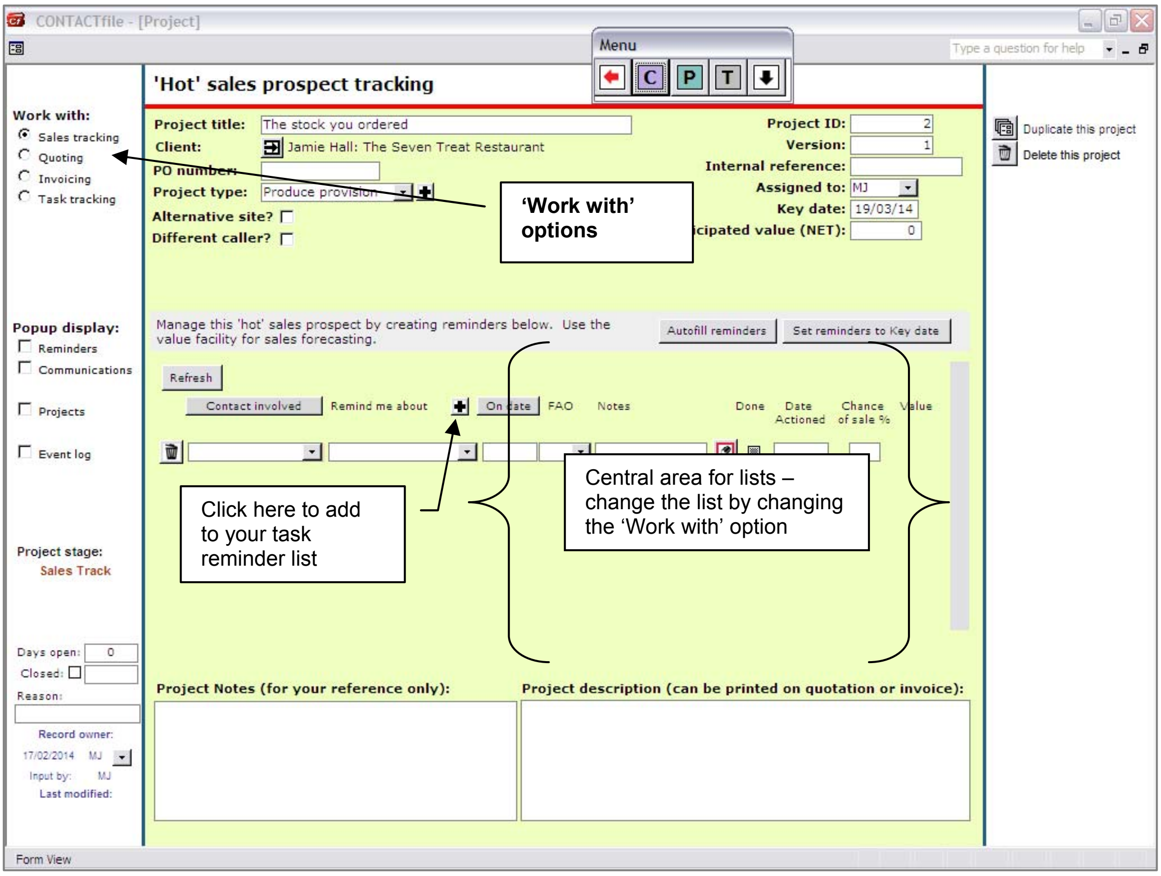
The next screen asks what actions you might take to secure a sale. List up to five tasks or actions. These will be used later on to generate a series of reminders in the 'Sale tracker', to help you follow up a hot lead or enquiry.

The last of the 'Tracker' screens asks you what actions you might take to complete the work that someone has purchased from you. List up to five tasks or actions. These will be used later on to generate a series of reminders in the 'Task tracker', to help you ensure that project is properly completed.



16.2. The new project screen

Follow the instructions for creating a new project in the section about the Project manager. Once created, this is how the new project screen looks before entering any more data.



It consists of two main sections. The areas around the outside carry the project specification and the central area carry the lists (which in this example will hold the task reminders). You can change what you want to work with by choosing from the options at the top-left corner of the screen. If you want to build a scheme for a potential sale, for example, select 'Sales tracking' from the work with options, and the central area will then display a list of sales reminders.

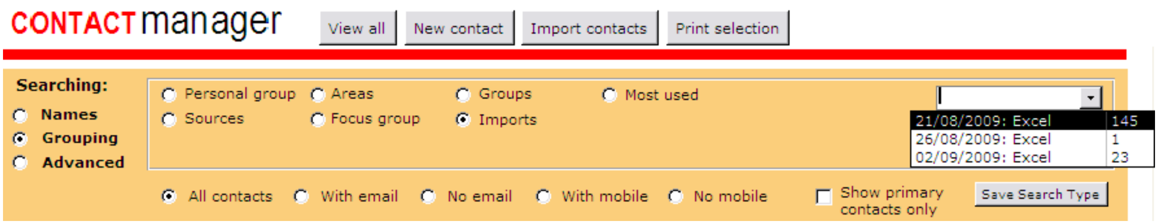
Any of the boxes can be edited here:

- Most of the boxes can be simply edited. If you have changed your mind about the title, for example, simply change it to what you want.
- If you want to change your mind about the client, double-click the client name.
- If you will be working on a different site to the one given for the client, tick the box 'Different site?' and then choose the site and your contact there in the same way as you choose for the client.
- If the person who called you to request the work wasn't the client, tick the box 'Different caller?' and choose the address and the person calling.
- The totals quoted and earned can be updated by clicking the 'Calculate' button.

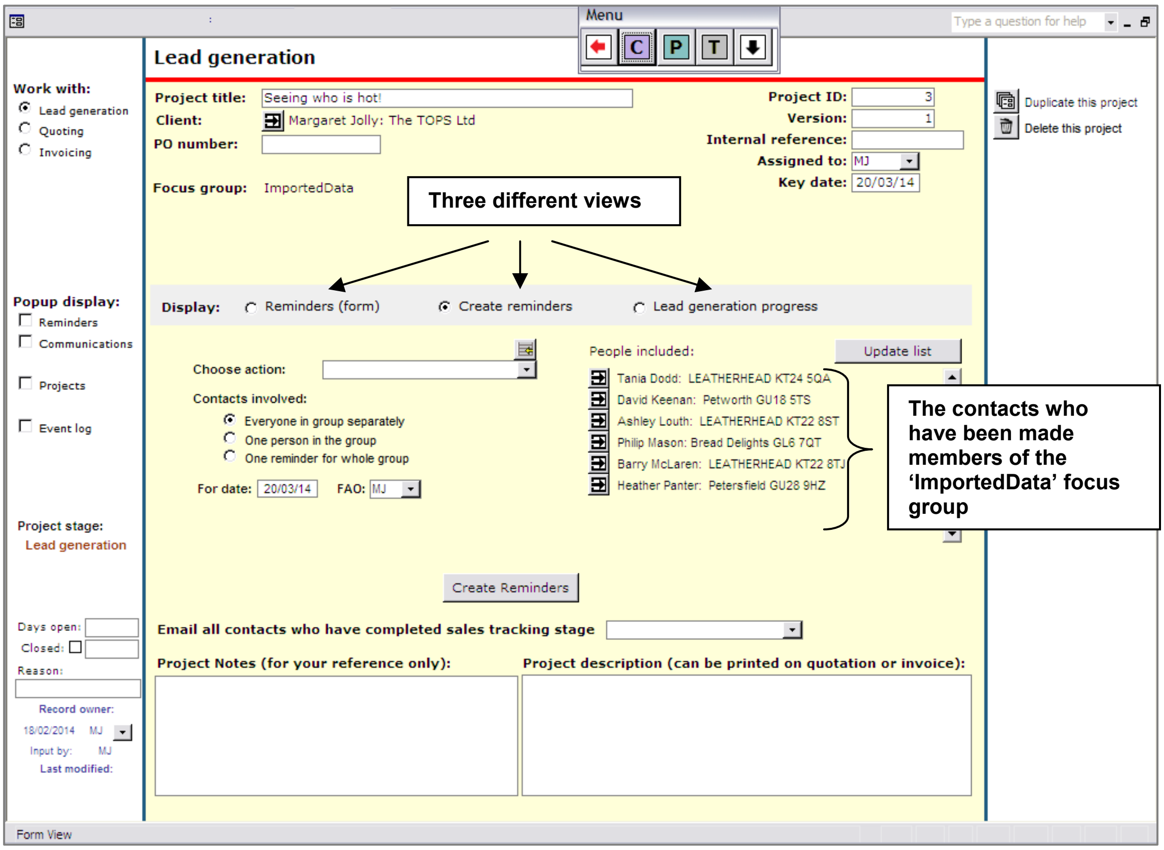
16.3. Lead generation: interacting with a group of contacts

Lead generation – taking a list of unknown contacts and seeing whether they are interested in what you have to offer – is a special type of project. The purpose of this project is to find which of your newly-acquired contacts is 'hot', and worth transferring to a sales tracking project of their own.

Before you can carry out a lead-generation project, you will need to create a focus group of the group you wish to target. Focus group management is covered in a previous section, but it is worth mentioning here that if you have imported your target group in one sweep, you can select them using the 'Imports' search, and transfer them on-block to a focus group.



To create a lead-generation project, follow the instructions for creating a new project in the section about the Project manager. At the last stage, you will be asked for the focus group, and not the client. As are most likely to be your own client for this project, and this will be automatically set, but f you are being paid by someone else to do marketing on their behalf, double-click the client to change it to the person paying you.



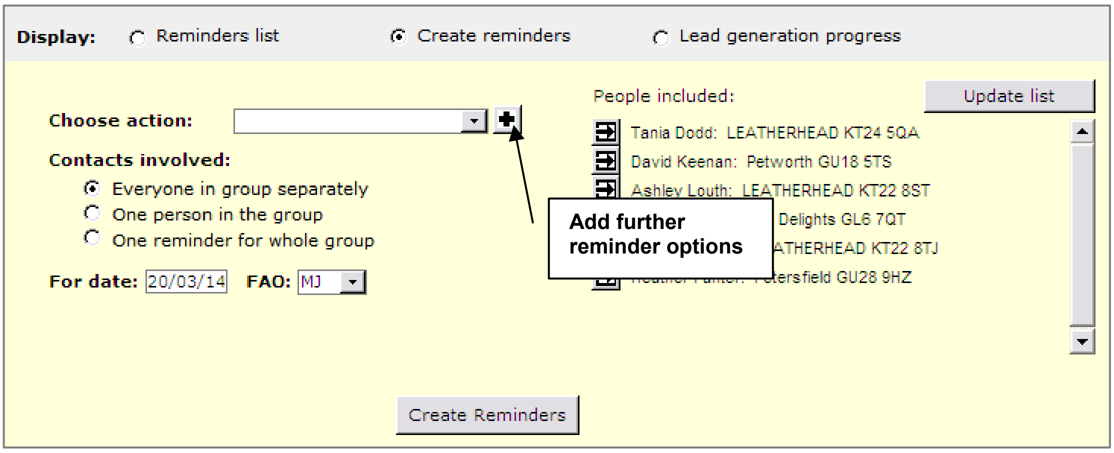
The management of a lead-generation project is based upon generating reminders, and marking each one as 'done' when the action has been carried out. Therefore, the lower half of the screen does not display items for sale, as in other project types – it consists of a mechanism for managing the reminder system. The main section of the Lead-generation project tracker form has three options for display:

- Reminders list
- Create Reminders
- Lead-generation project Progress,

which can be selected by clicking the option buttons displayed across the middle.

Create Reminders

When a lead-generation project is newly-created, this option will be shown automatically. It has a facility to create bulk reminders easily and quickly.



But before you can create any reminders, you will need some reminder types (actions) to choose from. At the start, the dropdown list will consist of the actions you entered as 'Sales tracking' step of the Setting up process. If you omitted this stage, the dropdown list will be empty. If the list is empty, or if it fails to give what you need, click the 'Add further reminder options' button.

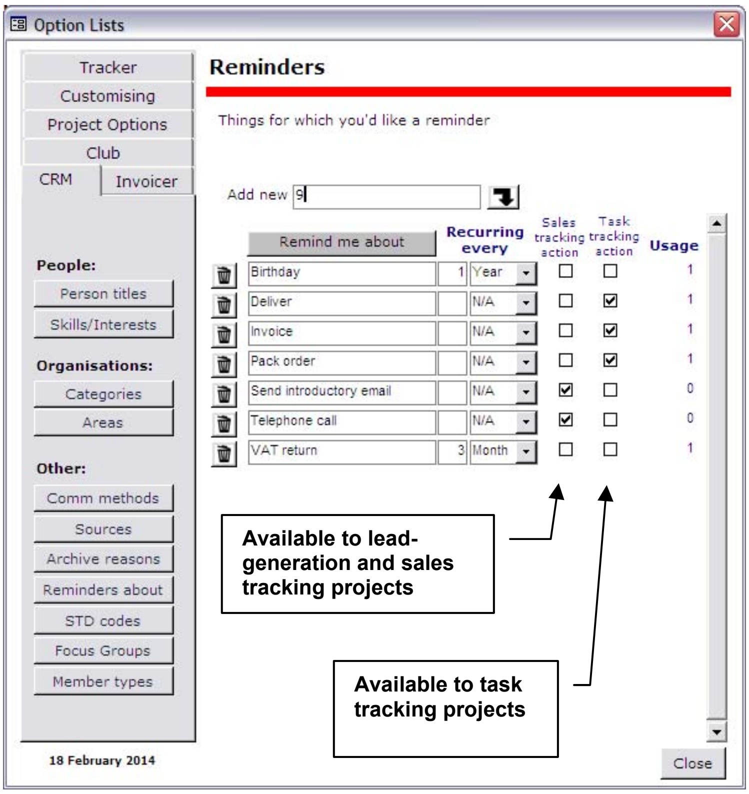
Changing the list of actions

Only sales tracking actions are presented for use with lead-generation.

If the reminder type (action) you want to do isn't listed, type the text in the 'Add new' box, and click the bent arrow to add it to the list. Repeat until you have all the actions you require.

Finally, ensure that a tick is placed against all reminder types that you need to have as part of your lead-generation process. Here, two reminder types will be available for use – 'Send introductory email' and 'Telephone call'.

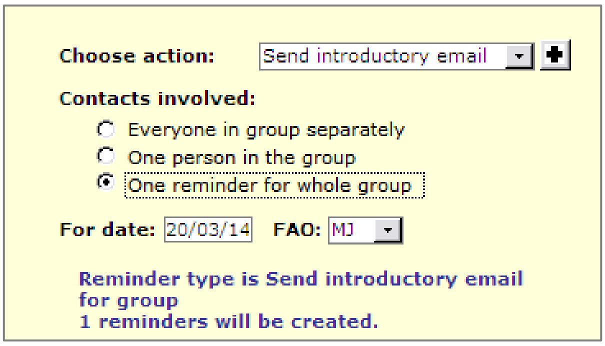
Click 'Close' when done.



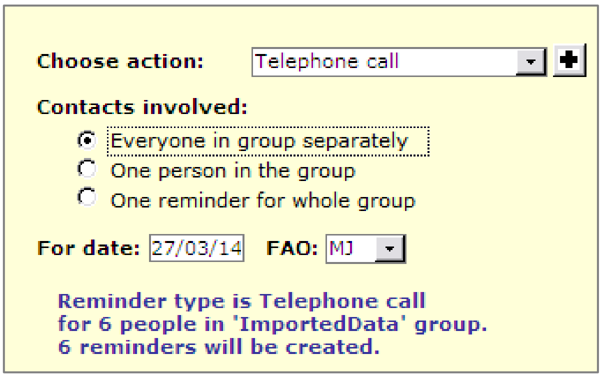
You can choose to create a reminder for everyone in the group separately, to only one person in the group, or create one reminder that applies to the whole group.

For this lead-generation project, we have six people in our focus group. An email will be sent out on bulk to all members, and will be followed up with individual telephone calls a week later.

First, choose to send an introductory email, and have one reminder for the whole group. Note that as you choose between these sets of options, a message will be displayed in blue, informing you of what is about to happen. Here, we will have only one reminder created. Click '**Create reminders**'.



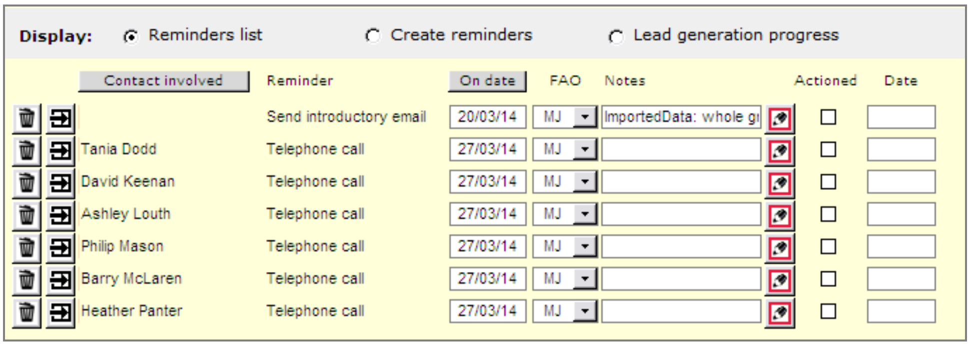
Next, choose to make a telephone call to everyone in the group separately. Change the date so it's a week later than the email. Click **Create Reminders** to create the number of reminders shown.



You will automatically be directed to the Reminders list, when reminders have been newly created.

Reminders list

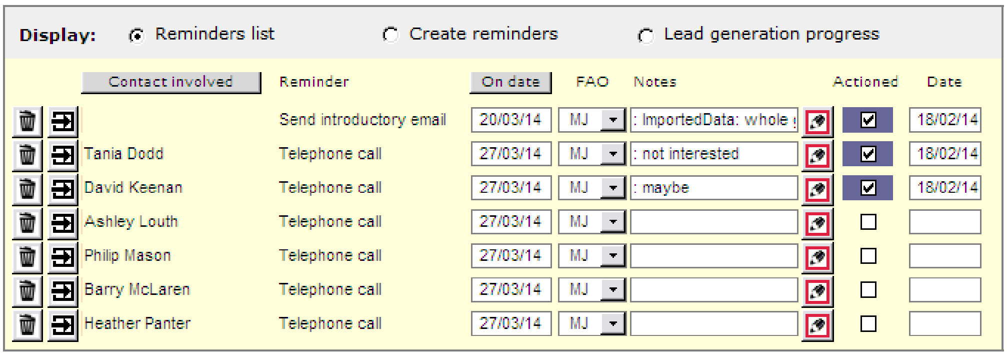
This form is to show the list of reminders created.



Display: Reminders list | Create reminders | Lead generation progress

Contact involved	Reminder	On date	FAO	Notes	Actioned	Date
	Send introductory email	20/03/14	MJ	ImportedData: whole g	☐	
Tania Dodd	Telephone call	27/03/14	MJ		☐	
David Keenan	Telephone call	27/03/14	MJ		☐	
Ashley Louth	Telephone call	27/03/14	MJ		☐	
Philip Mason	Telephone call	27/03/14	MJ		☐	
Barry McLaren	Telephone call	27/03/14	MJ		☐	
Heather Panter	Telephone call	27/03/14	MJ		☐	

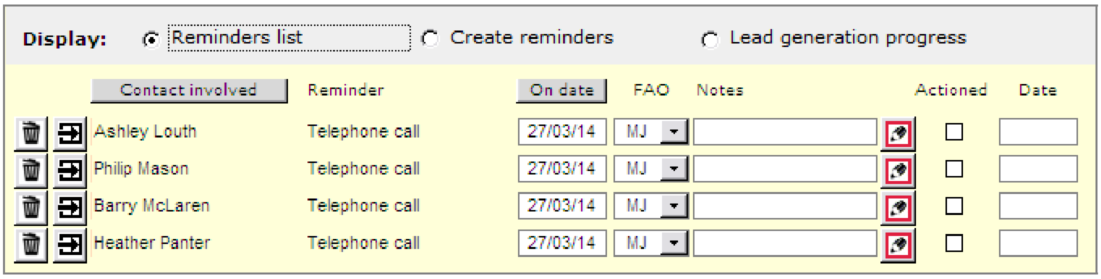
Here, you can delete any reminders you don't require, or write notes as appropriate. Use the reminders form particularly to keep a record the actions you have completed. Tick them as you do them, and today's date will be entered automatically. If your chosen reminder has been set as recurring, a dialog will pop up inviting you to enter the next reminder.



Display: Reminders list | Create reminders | Lead generation progress

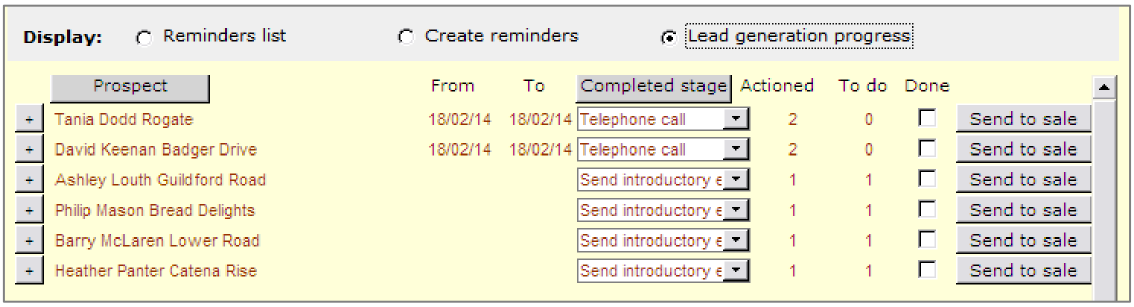
Contact involved	Reminder	On date	FAO	Notes	Actioned	Date
	Send introductory email	20/03/14	MJ	: ImportedData: whole	☑	18/02/14
Tania Dodd	Telephone call	27/03/14	MJ	: not interested	☑	18/02/14
David Keenan	Telephone call	27/03/14	MJ	: maybe	☑	18/02/14
Ashley Louth	Telephone call	27/03/14	MJ		☐	
Philip Mason	Telephone call	27/03/14	MJ		☐	
Barry McLaren	Telephone call	27/03/14	MJ		☐	
Heather Panter	Telephone call	27/03/14	MJ		☐	

Note that when you revisit this display, the completed tasks will have been transferred to the Communications, leaving only the still-to-do actions remaining in the display. Here is how the above form will look when revisited.



Lead-generation Progress

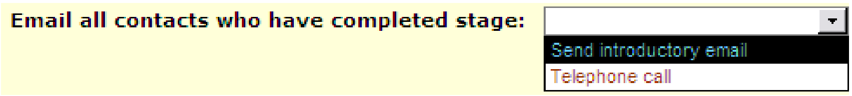
As you complete tasks, the progress of each prospect will change. Their status is recorded here. If you feel the prospect won't be persuaded, then tick the Done box. If you feel the prospect is 'hot', click '**Send to sale**' and a new sales tracking project will be created. With this new project, you can give your dealings with this person greater attention. See the sales tracking section on the next page for further detail on this.



Emailing

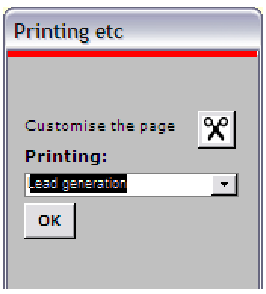
You can email everyone, or email prospects who are at a given status in your lead-generation project.

At the lower third of the screen, above the project notes area, drop-down option box to the right. If you want to email everyone in the contact group, leave the drop-down blank. If you want to email everyone who are at a certain status, choose the status you require.

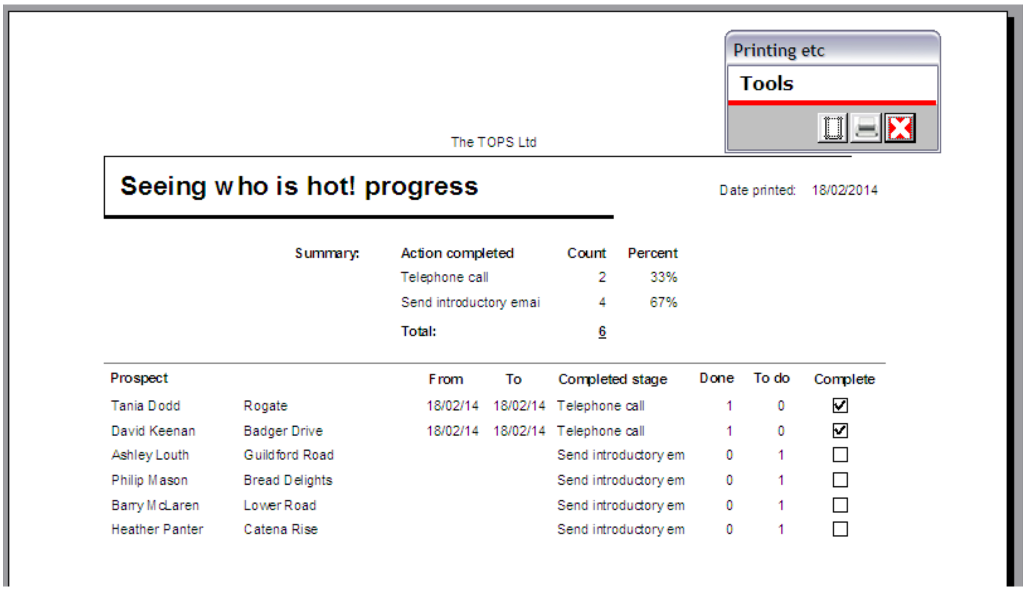


The computer will ask for confirmation of this request, then as soon as you agree, you will be transferred to the bulk emailing section of contact manager, with the correct set of contacts already listed at the top. Send the bulk email in the usual way.

Printing



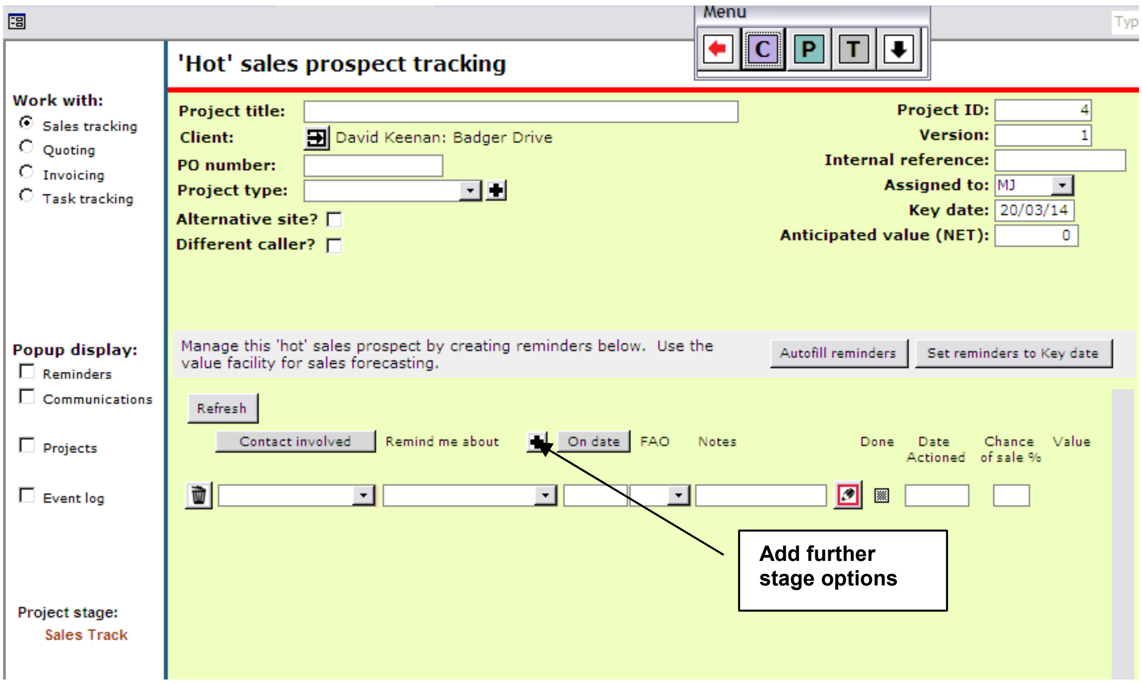
Aside from the usual Project specification print available from all types of project, for lead management there is the lead management report. On the Tools, choose 'Lead generation' and click OK. The report of project's progress can then be printed.



16.4. Sales tracker: Tracking a potential sale

With sales tracker you can record and track your progress through a series of actions that are designed to secure a sale, and be reminded to perform each one. If you are carrying out a lead-generation project, it is recommended to have a sale tracking project for each 'hot' prospect identified. But a sales tracking project can be used for anyone who shows an interest in what you do.

*Sales tracking projects can be initiated in the same way as any other project, by clicking the 'New Project' button on the Project manager, by clicking the 'New project' button on a contact's record, or by promoting someone from a lead-generation project. From here, the **same project** can be used for quoting, invoicing and task tracking, so that your full dealings with your client's purchase will be*



dealt with within the one project.

In our example for lead-generation on the previous page, we promoted our interested prospect David Keenan. It may need a title and/or project type.

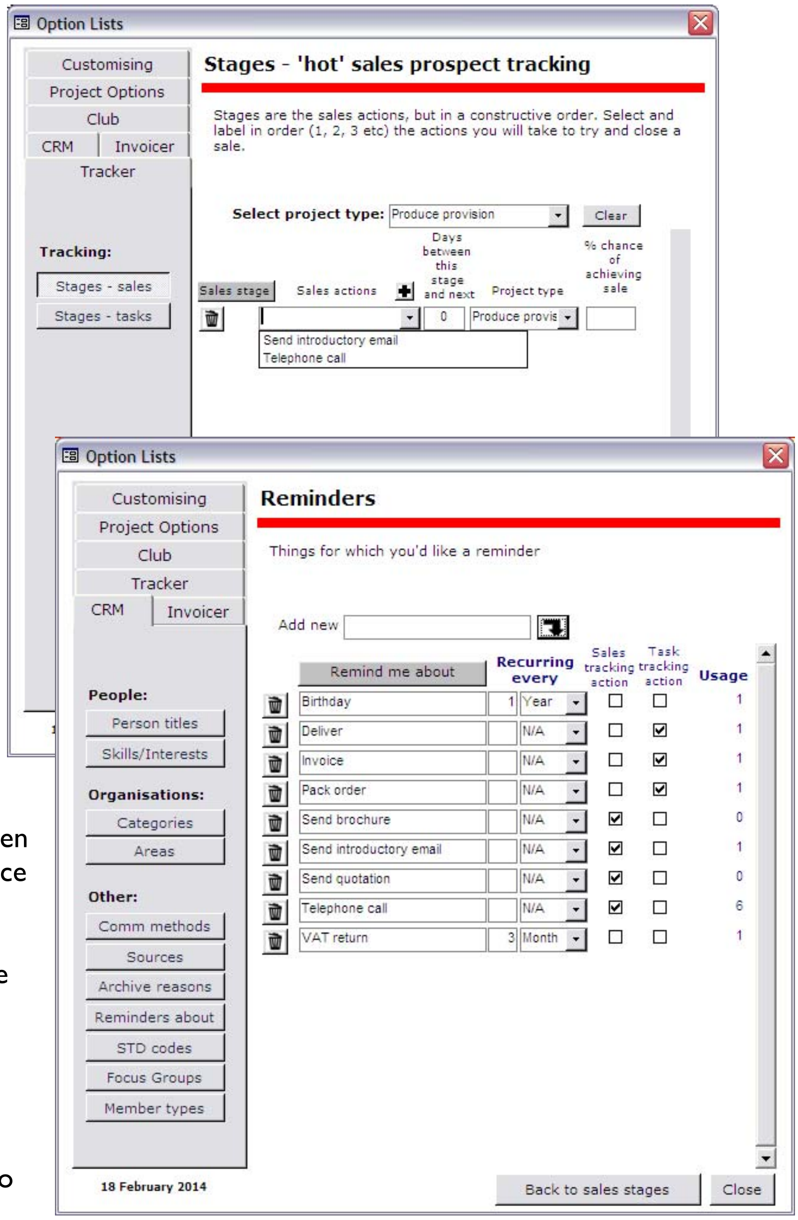
Setting sales actions

When you use Sales tracker for the first time, you will need to list the actions that you will typically carry out in order to secure a sale. Click the 'Add further stage options' button (indicated in the illustration on the previous page).

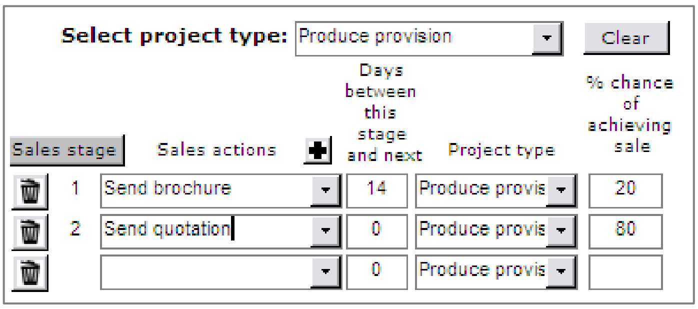
Actions are listed separately for each project type, and so you can have a different set of actions for each type of sale. In our case, the project type 'Produce provision' needs a set of actions that will secure the sale.

The possible sales actions are the ones ticked as such in your list of 'Reminders about'. In our example, we only have two; the ones that were entered for our lead-generation project. If you need to add some more, click the 'Add further actions' button, and edit the reminder list as required. Here, we have added 'Send brochure' and 'Send quotation' as new sales tracking reminders.

Click '**Back to sales stages**' when done, choose your action sequence there. Here, we have elected to send a brochure, and send a quotation 14 days later. We have also decided that should the brochure send be successful, we are 20% likely to win the deal. Similarly, we have decided that should the sending of a quotation be successful, we are 80% likely to win the deal.

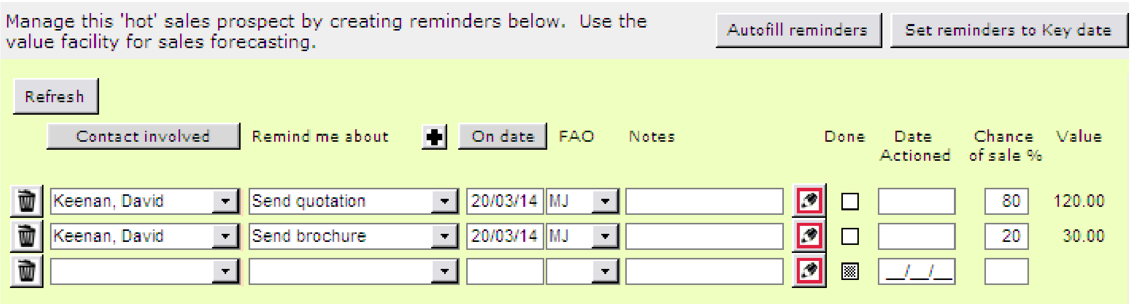


Close the dialog to return to the project screen.



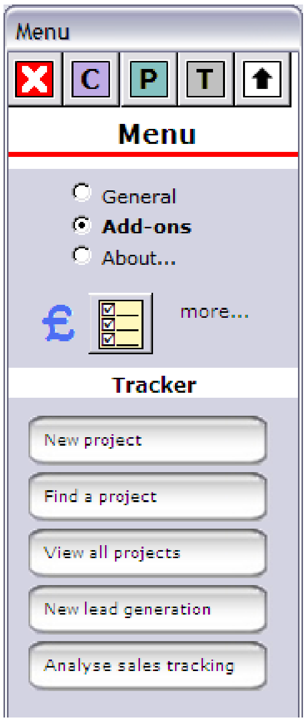
Back in the project, click the '**Autofill reminders**' button. This will automatically generate the list of actions as defined for that project type. Then click '**Set reminders to key date'** button, which will enter a date in each row which will be calculated by counting back from the key date. These reminders will now form part of the normal reminder system.

Note too how the generated reminders have the percentage chance of sale and a value. The percentage chance figures you will recognise as those set as defaults earlier. The value figures were calculated by taking the percentage as a proportion of the anticipated value of the project (in our example, £150) when it has been agreed.

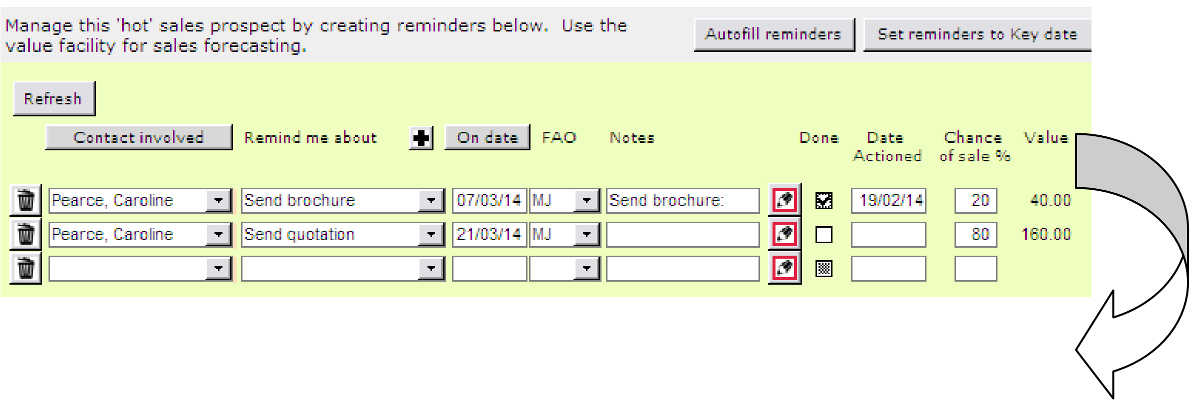


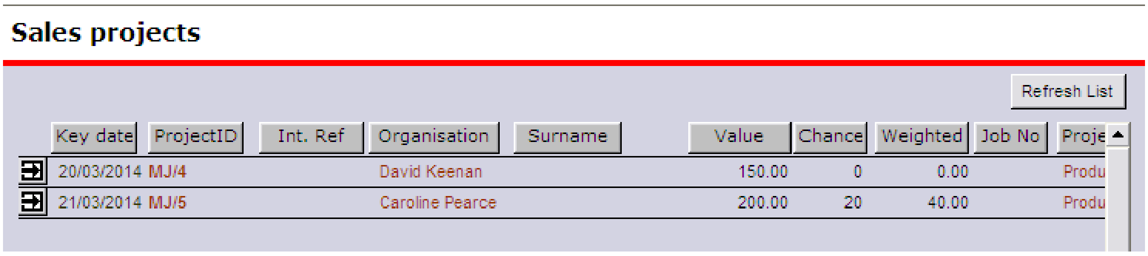
Analyse sales tracking

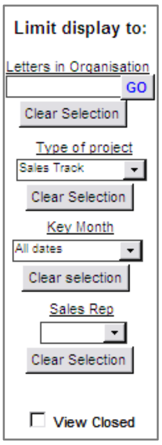
This utility allows you to view and print your overall progress through sales tracking projects. It is offered via the Tracker menu. It focuses on projects that are at Sales Track stage, and gives an overview of how each one is progressing. Note that only Sales Track projects with listed actions are included here.



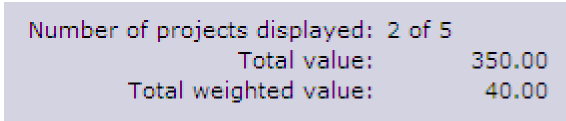
For example, here are two Sales Track projects. The first (our example above) has no actions complete, and is therefore worth nothing. The second, shown below, is from a project that has an anticipated value of £200. It has only one action complete, and so its chance of winning at this stage is 20%, and the value is £40.







The options in the left panel are to restrict the list still further. You can choose to see projects done for one organisation, for other types of project, for particular months, and/or those being carried out by a chosen sales representative. The totals at the bottom will provide a measure of comparison between the selections you make.



16.5. Task tracking: Keeping track of the work you do

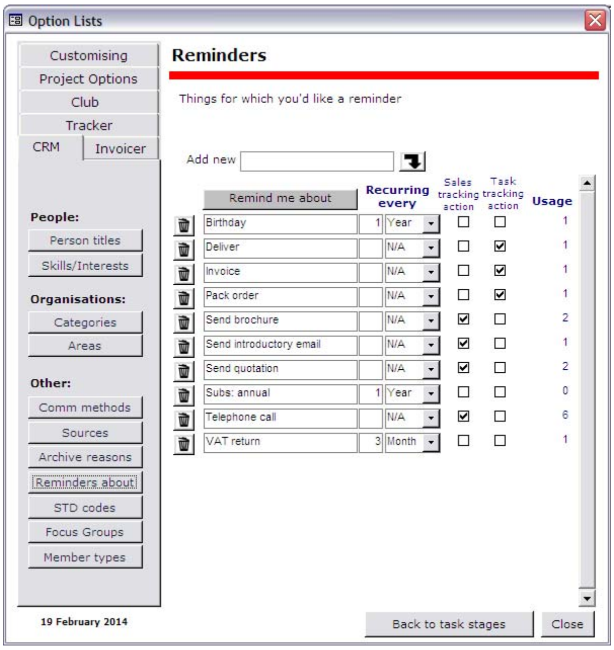
This is to track the steps you must take in fulfilling a client's order. So a task-tracking project will apply to work that has already been secured, and which therefore will already have sales track, quoting, and/or invoicing components.

To task-track a project, either:

- Create a new project and choose to start at the Task Track stage, or
- Click **Task tracker** in the left panel of an existing project record.

In our previous example (David Keenan's supply of produce for his wedding), let us assume that the sales process was successful, and we are now planning to carry out the work required.

Setting task actions

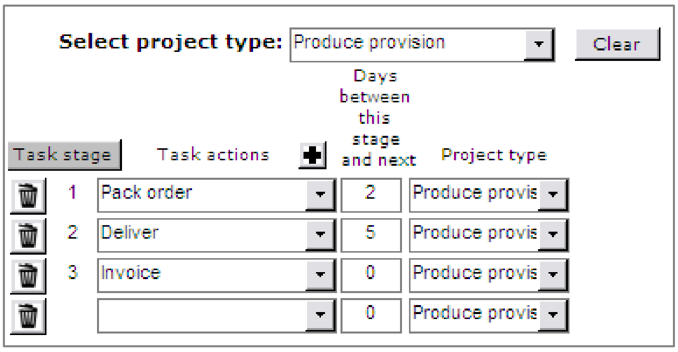


The first time you use Task Tracker, you will need to list the actions that you will typically carry out in completing the project. They are set in a similar way to sales tracking actions, and like sales tracking actions are listed separately for each project type, so you can have a different set of task actions for each type of project.

As with adding sales actions, click the 'Add further stage options' button.

Actions are listed separately for each project type, and so you can have a different set of actions for each type of sale. In our case, the project type 'Produce provision' needs a set of actions that will secure the sale.

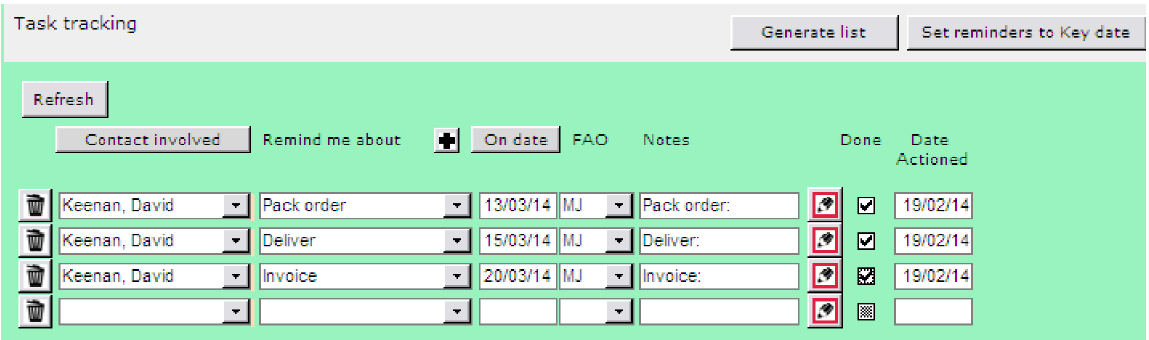
The possible task actions are the ones ticked as such in your list of 'Reminders about'. In our example, only have three; ‘Deliver’, ‘Invoice’ and ‘Pack order’. If you need to add some more, click the ‘Add further actions’ button, and edit the reminder list as required.



Click ‘**Back to task stages**’ when done, choose your action sequence there. Here, we have elected to pack the order, deliver within the next 2 days, and invoice 5 days later.

Close the dialog to return to the project screen.

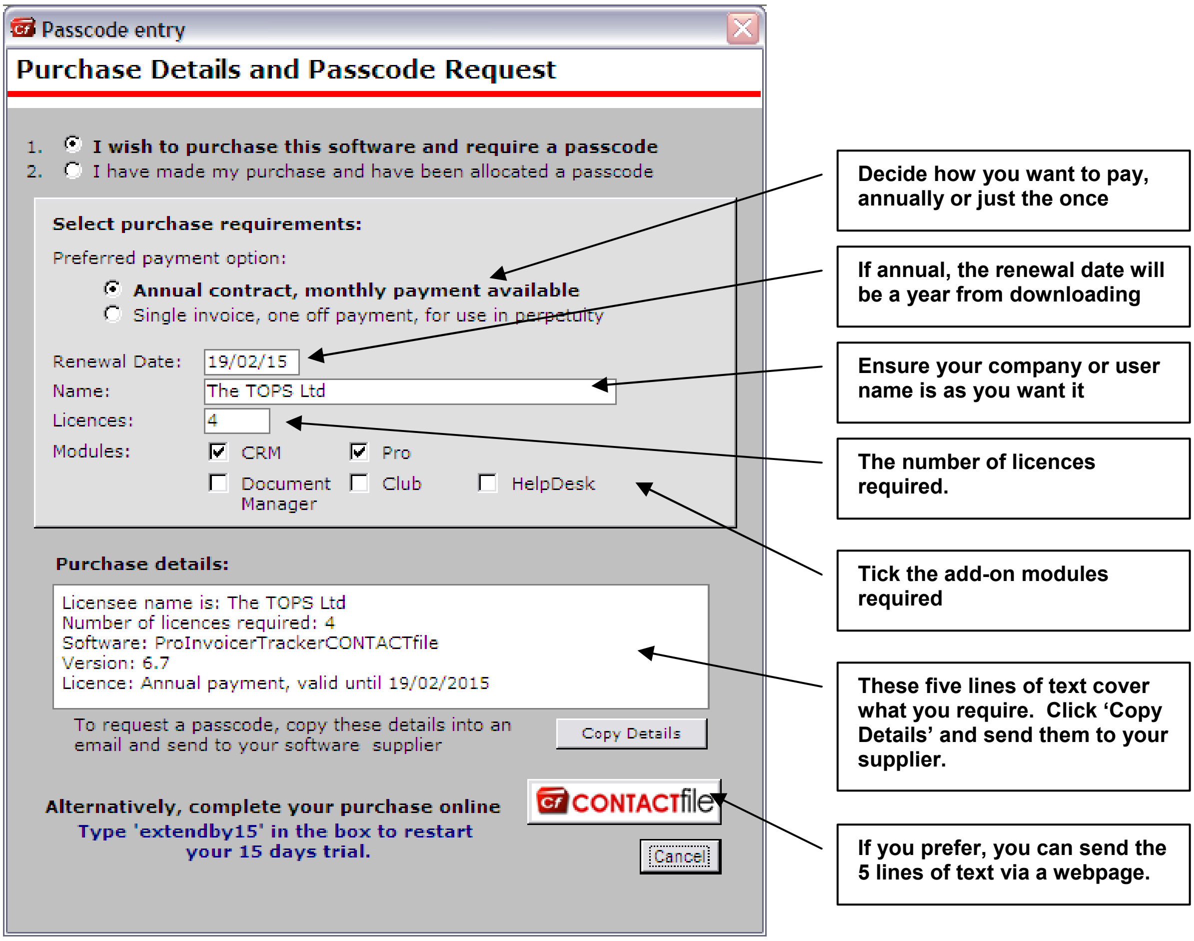
Back in the project, click the ‘**Autofill reminders**’ button. This will automatically generate the list of actions as defined for that project type. Then click ‘**Set reminders to key date’** button, which will enter a date in each row which will be calculated by counting back from the key date. These reminders will now form part of the normal reminder system.



When the task has been completed, a tick in the Completed column will register progress, and will prevent them from being displayed in the list of reminders. Also, the record will be listed as a communication, where a document can be attached to the task if required.

17. Buying CONTACTfile

Your database will run for 30 days (first 15, and then another 15 on request) without making any payment to your supplier. Before this trial period is complete, you will need to buy. When you purchase CONTACTfile, 3 months help and 12 months updates are included free, as standard. In purchasing, you have the choice to paying just once to enjoy CONTACTfile for use in perpetuity, or paying annually. To purchase, click the Purchase button on the main menu. The form shown below displays.



Your supplier will send you your passcode by return. When you have received it, click 'I have made my purchase…..' option in the centre of the form. Enter the passcode carefully (it is space- and case-sensitive) and click OK. A message will confirm that you have been successful.