ContactWise Training Guide

1. ContactWise Concepts

Using Multiple Addresses and Phone Numbers

ContactWise has the ability to assign multiple phone numbers and addresses to contacts and organizations. This provides that ability to have only one contact or organization record within the database.

Example:
You have a contact to add that has a business and home address. Instead of creating two separate contacts for each address you create one contact and add in the home address as a second address. (An outline on how to add multiple addresses and phone numbers is listed in the Adding Contacts and Organization section).

Primary Phone, Fax, Address and Email

Each contact and organization within ContactWise can be assigned multiple phone numbers, fax numbers, addresses and email address. Because of the ability to have multiple entries each contact and organization should always be assigned a primary phone, fax, address and email. The primary information is used when creating reports or sending correspondence.

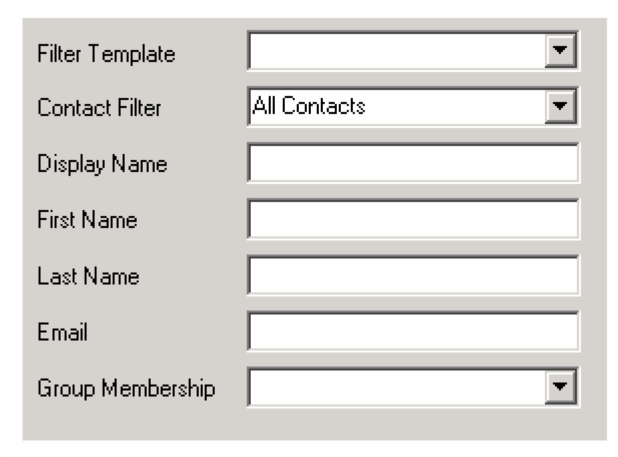
Example:
A new organization is added with the address of their headquarters based in Texas. A contact record is then added for an employee of the organization who is based out of Boston. Since the employee is based out of different location the primary address and phone should be set to the local address not the organization address.

PLEASE NOTE:

If the primary information is not set for a contact or organization then that record will not show up in reports nor will you be able to email the contact from ContactWise.

2. Searching

Searching Using the Quick Filter Dialog:



To use the Quick Filter to search for a **Person** follow these steps:

1. Select a Contact Filter of type **Person**.
2. Fill out additional information that pertains to the search criteria.
3. Click on Search button.

Example:

To find all contacts that have the first name Joe you would set **Contact Filter** to **Person** then in the First Name field you would type in **Joe** then click on **Search.**

For situations when the exact spelling for a name is not known then an asterisk (*) can be used as a wild card. An asterisk can be used in any of the fields for wildcard searching.

Example:

Suppose you don't know if the person you are looking for goes by Joe or Joseph. In this situation you would set **Contact Filter** to **Person** then in **First Name** field type **Jo*** and then click on **Search**. This will return all person records that begin with Jo.

Narrowing the Search

It is possible to narrow the search in order to have a closer match returned. In the above example all person records that began with Jo were returned. This is still a sizeable number of contacts to browse. To narrow the down the results returned provide as much information about the contact as possible.

Example:

Though you are not sure if the person goes by Joe or Joseph you do know that his last name is Smith. To narrow down the search you would type **Jo*** in the **First Name** field and **Smith** in the **Last Name** field. This will return all persons with the first name beginning with Jo and last name Smith.

To use the Quick Filter to search for an **Organization** follow these steps:

1. Select a Contact Filter of type **Organization**.
2. In **Display Name** field type the entire name of the **Organization** or use wildcards for partial names.
3. Click on Search button.

Example:

To search for Leggat McCall Properties you would set **Contact Filter** to **Organization** and in the **Display Name** field type either **Leg*** or **Leggat McCall Properties**.

PLEASE NOTE:

When searching for an organization it is advisable to always use wildcards for the search. If the name of the organization is not typed **exactly** as it appears in the database then the record for the company will not be returned.

To Clear Search Results:

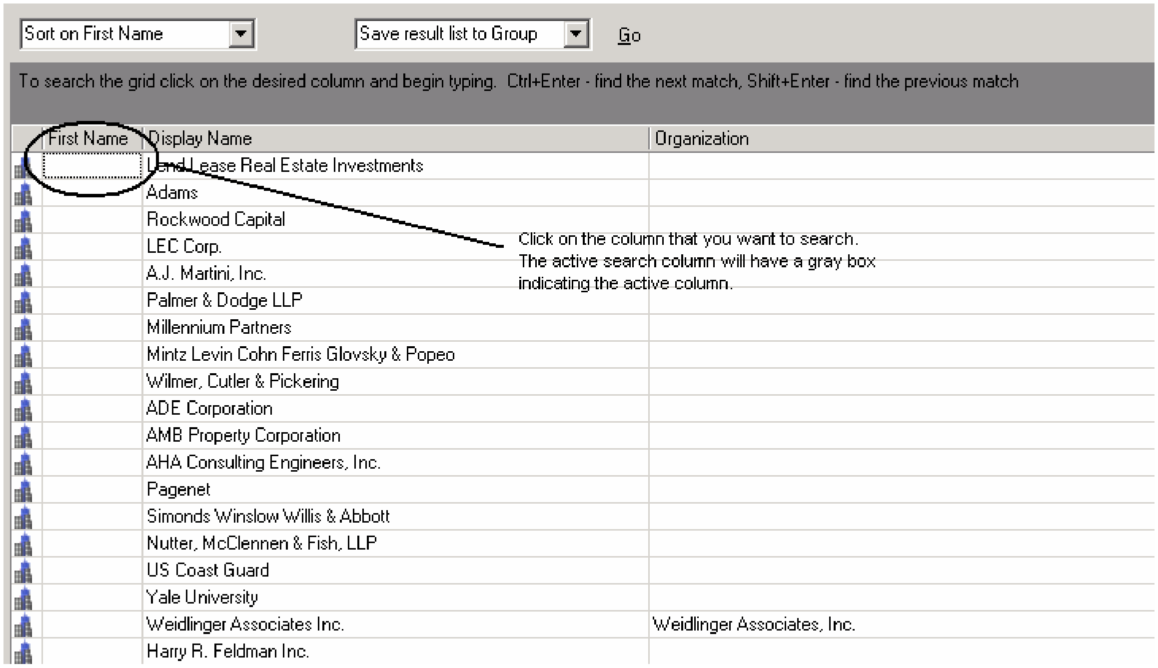
To clear the results of a search and display the entire database again click on **Clear Search** and then click **Search**.

If the **Contact Filter** was changed to **Person** or **Organization** it needs to be changed back to **All Contacts** in order to display the entire database.

PLEASE NOTE:

If you want to perform another search you may do so without clearing the last search. Each time a search is executed the entire database is searched not just the last search results.

Searching Using the Main Grid:



To search using the main grid follow these steps:

1. Select a sort order from the drop down box.
2. Click on Column that you want to search.
3. Start typing the search criteria.

Example:

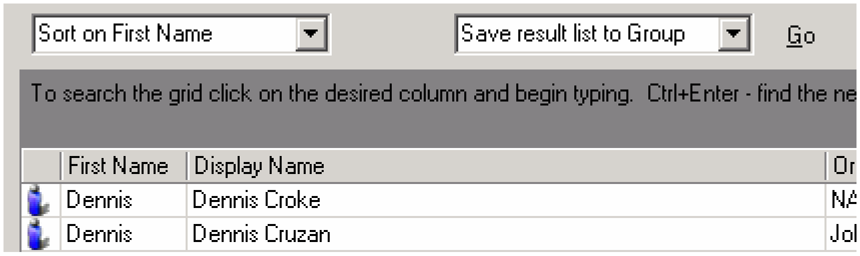
Suppose you are looking for a person with the last name of Smith. First change the sort order to **Last Name** and then click in the **Last Name** column. Then you start typing Smith. As you type Smith the database will move down to the first entry that begins with Smith.

Saving Search Results:

After a search has been defined it may be saved for later use. This is helpful if you find you are performing the same searches repeatedly.

There are a couple of different ways in which to save your search depending on how

Saving Search Results to a Group or Filter:

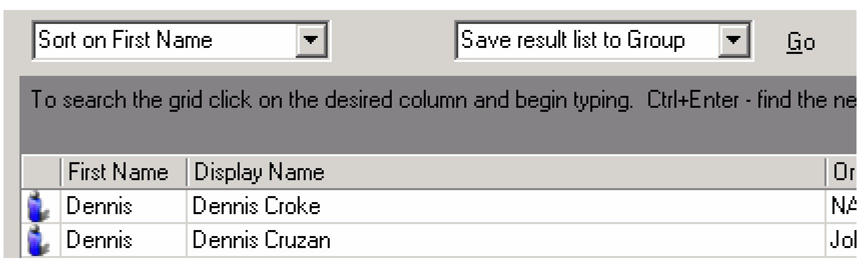


3. Sorting

To sort data in the main grid select which column should be sorted from drop down dialog box at the top of the grid. The column that is selected is sorted alphabetically. The choices to sort on include:

- Display Name
- Organization
- First Name
- Last Name

Sorting is helpful when performing searches via within the Main Grid.



4. Groups/Filters

Groups:

The use of Groups is appropriate for data that is static - that is will not change frequently. They are useful for creating subsets of data based on criteria. Some examples of groups are a listing of contacts by user and mailing lists. The most important thing to remember with groups is that once they are defined the membership must be kept up manually. For example, if you create a group with all the contacts that begin with Jo and then a new contact is created that starts with Jo then that person will have to be added to the group.

A group within ContactWise can be public or private. A public group can be seen by all users of the database while a private group can only be seen by the user who created the group.

Creating Groups:

To create a group in ContactWise:

1. Select the **Groups and Filters Tab** on the ContactWise main screen.
2. Select **Add Private Group** or **Add Public Group**.
3. Enter a name for the Group in the dialog that comes up and then click OK.

Adding Members to a Group:

From within a Contact record:

1. Open a contact record.
2. Click on the **Groups** tab.
3. Click on the **Modify Group Membership** icon.
4. Check the boxes of the groups to which you want the contact added and click the Save button.

From the **Main Grid**:

1. Right-click on contact record to be added to group.
2. Select **Open Groups** from the context menu.
3. In the Contact Groups dialog check the groups for membership.

From the **Groups and Filters** tab:

1. Double click on a group that contact will be added to.
2. Add a member to a group by clicking the **Add to Group** button.
3. In the Select a Contact dialog select or multi-select the contacts you wish to add to the group and click the OK button.

Defining Default Group:

Having a default group defined can be useful if you have predetermined subset of data that you always use. For example, if you have created a group with all of you contacts and defined this group then you can switch to this group from the Main Grid at any time.

From the **Groups and Filters** tab:

1. Select **Groups** from menu.
2. From menu select **Default Group/Filter.**
3. In the dialog box select desired default Group then click on OK.

Once a default group has been defined then the group can be selected by clicking on the **Default**/**Group Filter** tab in the main screen.

Filters:

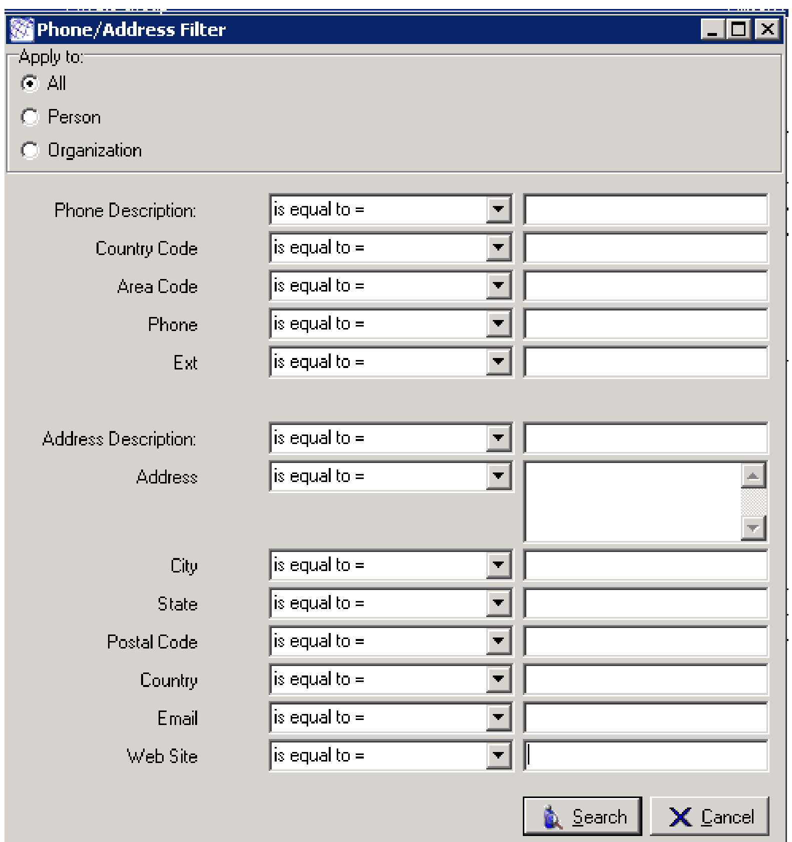
Filters are used to search for a subset of data based on criteria that is usually defined by fields within the database. For example, a filter can be created that will list all contacts that live in Boston with a certain area code. If a contact is added with the same criteria then this person will automatically become part of the filter. In addition if someone is part of the criteria and their area code changes they will no longer be part of the filter.

Once a filter is created it can be saved for future use. A filter, like a group, can be defined as public or private. With the exception of quick filters, filters can be edited in order to change the search criteria.

Creating Filters

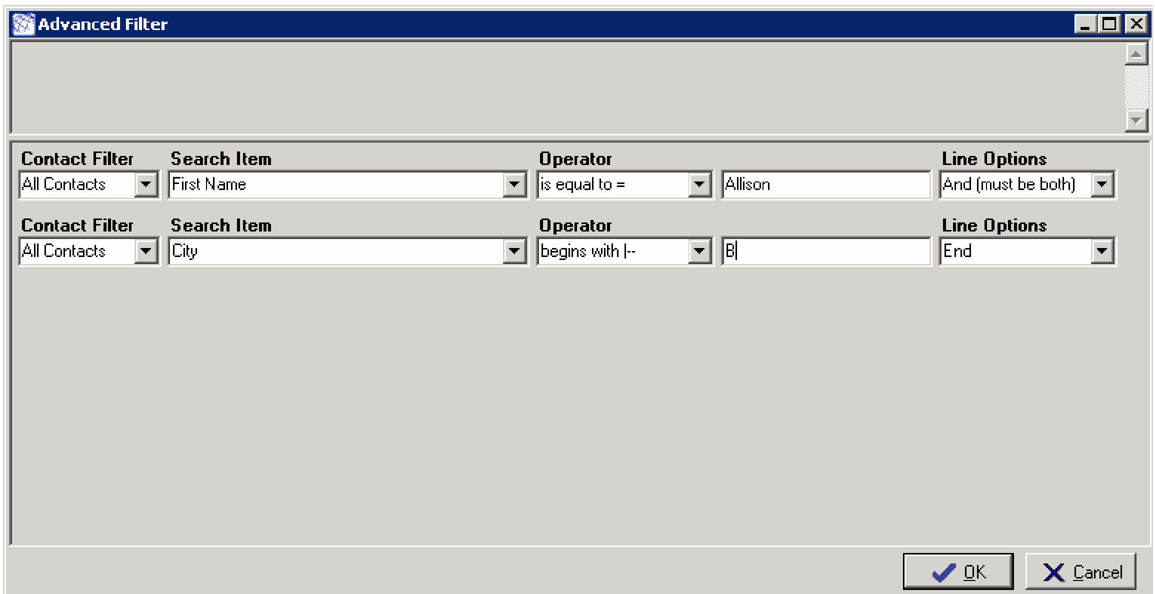
To create a Phone/Address Filter:

1. Select the Filters menu option.
2. Click on Phone/Address Filter
3. Fill in criteria for the filter in dialog box.
4. Click on Search
5. A dialog box will appear with the results of the filter. From this box the filter can be viewed, saved or edited.



To Create an Advance Filter:

1. Select the Filters menu option.
2. Click on Advance Filter
3. Fill in criteria for the filter in dialog box.
4. Click on Search
5. A dialog box will appear with the results of the filter. From this box the filter can be viewed, saved or edited.

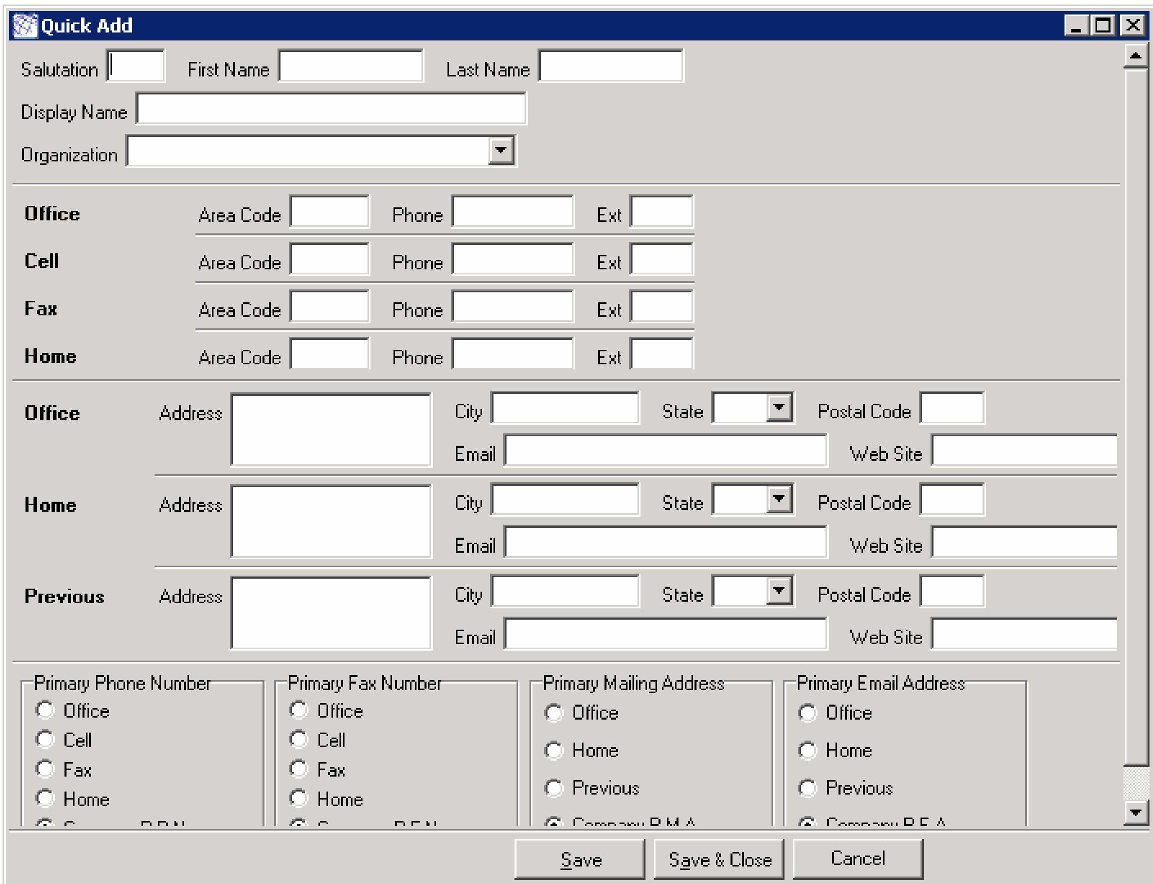


5. Adding Contacts and Organizations

There are two methods in which to add new contacts and organizations into ContactWise – **Quick Add** and **Full Add**.

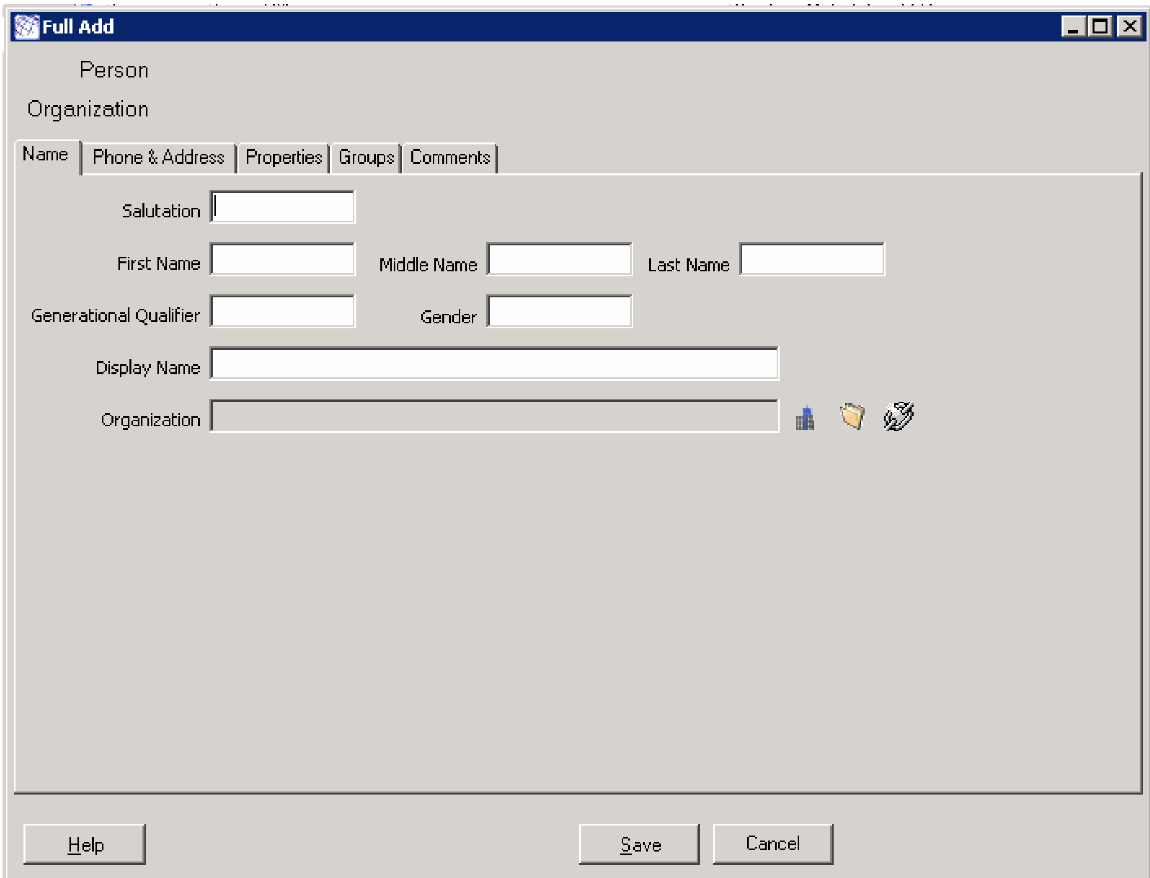
Quick Add

When using the **Quick Add** method all data is entered on a single screen and the tab key can be used to move between fields. The disadvantage of using **Quick Add** is a new organization cannot be created for the person.



Full Add

The **Full Add** method displays a tabbed dialog box. Each tab represents a set of data that can be inputted for the person or organization. When using the **Full Add** method a new organization can be created during the creation of a person.



Guidelines for Entering Data

1. If a contact has a company then the contact should be associated with the company.
2. When entering the phone number it is important the area code is in the area code field and the seven digit phone number is in the phone field.
3. Each contact should have a primary phone number, fax number, address and email address.