

CONTACT Sage Pro Central Version Manual Version 2.0

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Introduction: (in this manual, the Contact Sage Pro Central Version will be referred to as the Central Version)

The Contact Sage Pro Central Version is designed to import data from producer databases on a network to a central location; so that Administrators and Managers can run Contact Sage Pro reports on all contacts in an agency, and also transfer Contacts between Producer databases. The transfer function can be used to transfer a subset of a producer's contacts to a partner, a junior producer, or an assistant. This manual will explain how to set up the Central Version so that it can import producer data, and also how to transfer contacts between producers. With the exception of the afore-mentioned 2 functions, the Central Version is identical to the regular Contact Sage Pro.

Our systems interface with programs from Microsoft Office, Microsoft Outlook, Email Programs, Group Mail Programs, Image Viewer Programs, and PDA sync programs and applications. Many of our users also set up our systems on networks so that multiple users can use the same system at the same time. We **cannot provide support** for **software** that we did not create, even if our systems can interface and use that software. Further, we **cannot provide support** for setting up **network systems**. Our systems are designed to only pass data to outside programs. Please **direct all support questions** about **outside programs** to the developers of those programs.

We reserve the right to change the cost of the Contact Sage Pro, Central Version, all optional modules, and the Annual Support without prior notice. However, the Annual Support price will **always remain** at the level that it was at when the software was purchased.

Using the Central Version with multiple Contact Sage Pro systems on a network:

There are 3 options for setting up different Contact Sage Pro databases so that the Central Version can pull data from the different databases.

- 1) The first is to install each Contact Sage Pro database into a separate directory on a central server. You can either have a master Contact Sage Pro directory and subdirectories for each database, or you can have separate master directories for each Contact Sage Pro directory. The master and subdirectory names cannot contain spaces (use underscores instead.)
- 2) The second is to install separate Contact Sage Pro databases onto each producer's desktop, and that the producer's desktops all be networked to each other.

The first and second options require that you map and enter the direct path to each producer's database onto the Producers screen.

- 3) The third is to install separate Contact Sage Pro databases onto each producer's desktop, but doesn't require that the desktops all be networked to each other.

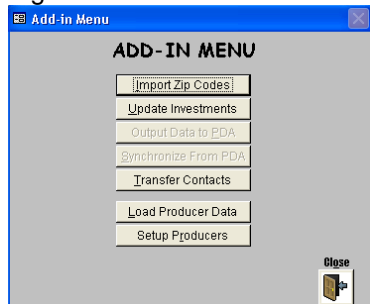
Because the third option doesn't require that the desktops be networked, you must create separate directories for each database on the computer which has the Central Version installed on it. To pull data from the different databases, you must copy each Contact Sage Pro database into its corresponding directory on the computer that has the Central Version installed on it.

Setting Up Producers:

The Contact Sage Pro Central Version needs to know who each producer is, and also where that producer's database is.

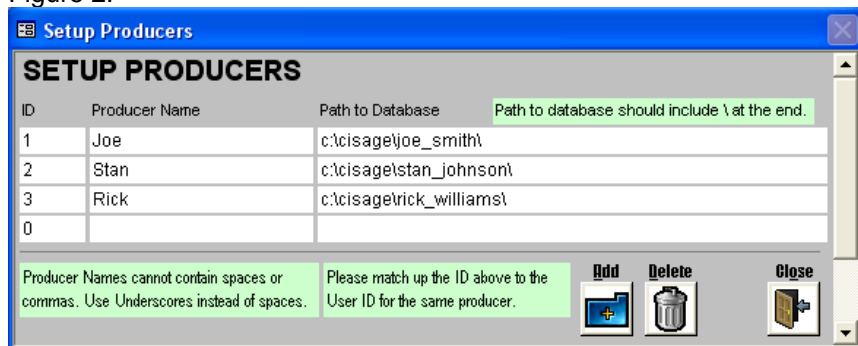
You should enter information for each producer into the Setup Producers screen. (This is different from the User screen where you designate users as producers. That will be covered below.)

Figure 1:



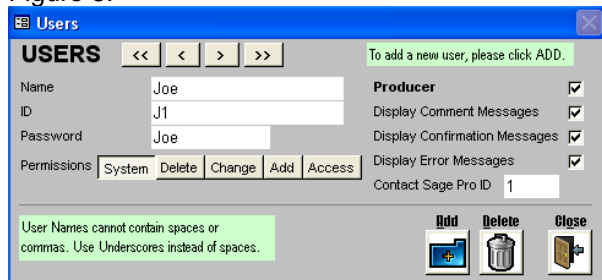
All of the Central Version functions can be accessed from the Add-in Menu by clicking Utilities, then Add-In Modules. To enter producer name and database path information, click Setup Producers.

Figure 2:



You can assign any ID to a producer as long as it is unique from the ID's for other producers. The producer name cannot include spaces or commas. Instead of spaces, we recommend using underscores. The Path to Database should be the mapped path to the server or desktop that has the producer database on it. Generally you should setup a separate directory for each producer. You can enter as many producers as you have.

Figure 3:



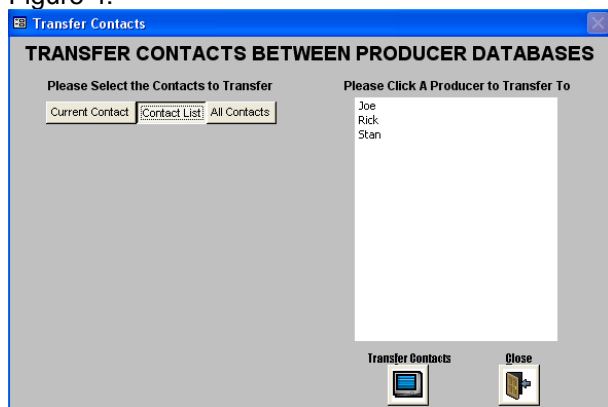
After you add the producers, you should set up a corresponding user for each producer that you set up. Make sure that the Contact Sage Pro ID on the Users screen matches the ID on the Setup Producers screen for the same producer.

Loading Producer Data:

To import contact data from all of the producer databases, simply click Load Producer Data. The system will sequentially load each producer's contact data into the Central Version. If a producer database cannot be found, you will be alerted. When it is finished, a message box will pop up. You should exit and restart the Central Version for all of the imported data to be finalized.

Transferring Contacts between Producers:

Figure 4:



Transferring Contacts between Producers is simple. The first step is to run a search to get a list of the contacts you want to transfer. The next step is to turn on the List Option from the Contact List Screen and check which contacts you want to transfer. The Final step is to confirm you selection of contacts you want to transfer, pick the producer to transfer the contacts to, and click Transfer Contacts. You will be asked to enter a transfer password- **“transfer”** to proceed. When the transfer is complete, you will be notified. You should restart the Contact Sage Pro Central Version after you finish a transfer to finalize the data.