CONTACT Sage Pro User's Guide

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The Contact Sage Pro Manual explains how the Contact Sage Pro works conceptually and also points out all of the functions and button actions in the program. Unfortunately, because the goal of Contact Sage Pro was to make the program small, there is no built-in help menu to walk the user through common actions. This usage manual will explain, step-by-step, how to perform common tasks in Contact Sage Pro. The order of the tasks will be based on how you would first begin using Contact Sage Pro out of the box.

If you can't find the answer to your questions in this Guide, please check the Contact Sage Pro Forums on our website.

When Contact Sage Pro is first installed, all of the databases are empty. There are no defined system users, no contacts, and no contact related information such as appointments, notes, remarks, links, policies, or investments.

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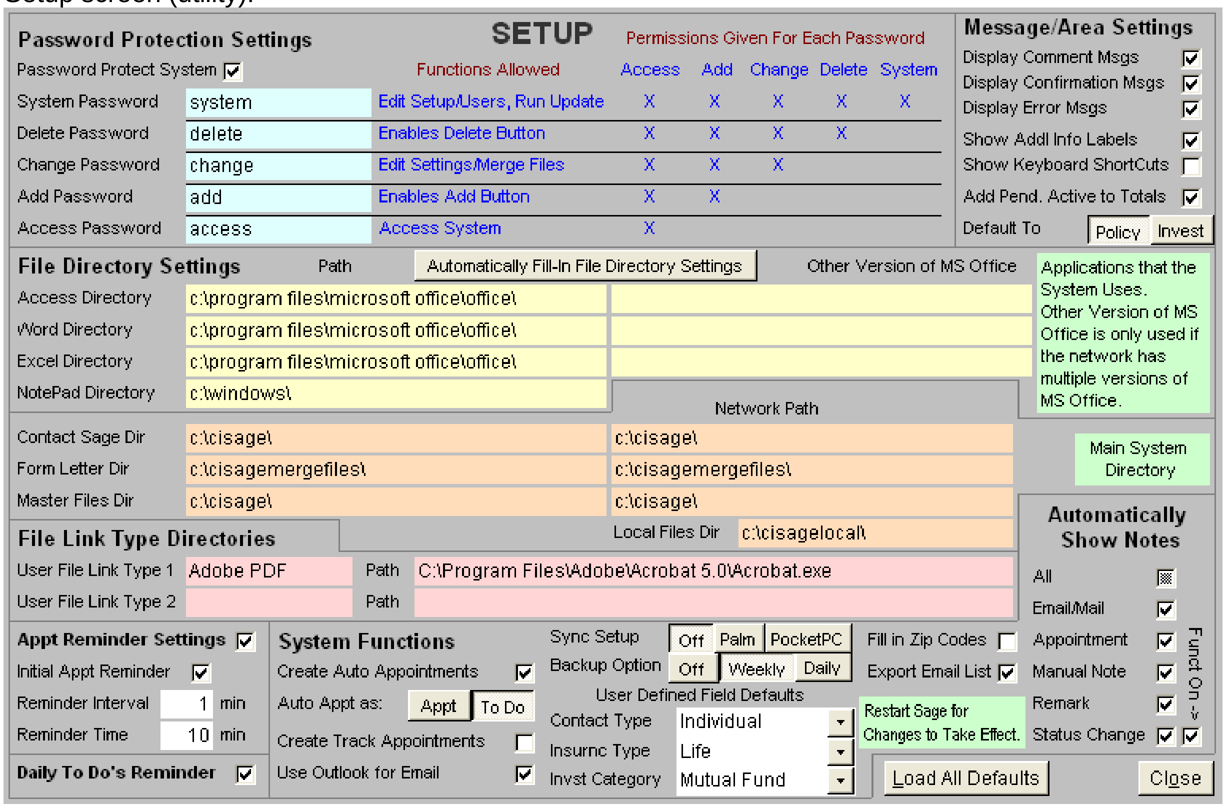
Setting Up The System

Setting Up Contact Sage Pro Options

The Contact Sage Pro is distributed with generic system settings. The administrator has the option of specifying the directories and drives used by the Contact Sage Pro, activating or deactivating the system password, backup, and schedule alarm systems, and resetting all system passwords.

The following screen is the default setup. The appropriate settings for each of the parameters will be discussed.

Setup screen (utility):



The first section of the setup screen lets the administrator (you) activate/deactivate the password function and change the various passwords. If the Password checkbox is not checked, all of the password protection is deactivated. This means that any user who runs the Contact Sage Pro is free to delete data and change any of the system parameters. Unless the system is used on a secure, stand-alone computer, the password function should be active. The five passwords in the password section let the administrator give out limited access to the system. The blue on/off labels next to each of the passwords state what system areas each of the passwords allow access to. For instance, the change password lets a user access all functions in the system except deleting records, changing users, changing system setup, or updating the system. A general password entered by a user is checked against the five stored passwords one at a time vertically. (The system password if checked first.) If you only want to have one password to give full system access, give out the system password. All of the other passwords will not be used.

The next set of parameters lets you specify which directories the Contact Sage Pro will use. (Contact Sage Pro will be called the program.)

The program can automatically locate the necessary directories on your computer. Because there may be multiple directories that contain the necessary files, you will be asked to select the directory you want to use. To run this feature, click AUTOMATICALLY FILL-IN FILE DIRECTORY SETTINGS.

The following table points out system functions that may not work if the directory settings are incorrect.

Directory Label	Path To	Problems if directory invalid
Access directory	Microsoft Access	not be able to run the backup or update
Word directory	Microsoft Word	not be able to run word reports or open mail merge files from the system
Excel directory	Microsoft Excel	not be able to run contact, premium, or commission reports to Excel
Notepad directory	Microsoft Notepad	not be able to run contact, premium, or commission reports to Notepad
Contact Sage	cisage.mdb	the backup program and version update programs will not work
Form Letter	word templates	form letters will not open
Master Files	contact files directory	contact file links will not open
User File Link 1	user file application 1	not be able to open file links with user defined application
User File Link 2	user file application 2	not be able to open file links with user defined application

If you will be running the Contact Sage Pro on a network, please fill in the directories on the right side of the Setup Screen labeled Network Path:

Directory Label	Path To	Problems if directory invalid
Contact Sage dir	network cisage.mdb	the backup program will not work from a networked computer
Forms Letters	network *.doc, *.rtf	network users will not be able to open central form letters or forms
Master Files	network contact files	network users will not be able to open contact's files
Local Files dir	local manuals	network will slow down

If network computers have different versions of Microsoft Access/Word/Excel or Office, please fill in the Other Versions of Office section. Each computer must have Access/Word/Excel installed on them to use Contact Sage functions that require these applications.

The following table points out standard Microsoft Software Directories:

	Version- directory always starts with "c:\program files\microsoft office"				
Program	97	2000	2002/XP	2000 Runtime	2002/XP Runtime
Access	\office\	\office\	\office10\	\art\office\	\office10\
Word	\office\	\office\	\office10\		
Excel	\office\	\office\	\office10\		

	Microsoft Windows Version	
Program	98/ME/XP	2000/NT
Notepad	c:\windows\	c:\winnt\

Appointment Reminder Settings: checkbox enables/disables the pop-up appointment reminder window. The appointment reminder interval establishes the time period that the system waits between checking for new appointments. The appointment reminder time sets the time period that an appointment reminder box appears before a scheduled appointment.

The System Message Settings lets you turn system messages on/off. As a user becomes more familiar with the Contact Sage Pro, the Comment and Confirmation Messages can be disabled. The Error messages should be left on for most users.

The Contact Sage Pro gives you the option of having the system automatically remind you to backup daily or weekly.

The auto appointment checkbox is used to turn the master auto appointment feature on/off. The auto appointment feature automatically sets up an appointment based on the call frequency selected for each contact. You can turn the auto appointment checkbox on/off for each contact.

You can also select whether you want the investment or policy information to automatically appear when you view contact information. However, once you change the option in the product area selector, the system will remember that choice until it is restarted.

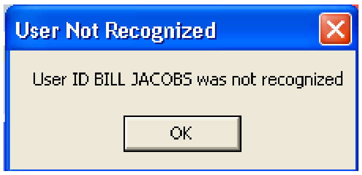
If you will be synchronizing the system with a PDA (Palm or Pocket PC), you must click the appropriate device type for the synchronization to work.

Automatically Show Notes: All notes and remarks in the system can be checked to appear on the contact information screen. This feature was designed because there is limited space for notes and remarks on the contact information screen. Each of the checkboxes in this section controls whether the system automatically checks the associated notes to appear on the contact information screen.

The status change checkbox to the right of the show status change notes controls if the should system automatically add a status change note to a contact as that contact's status changes.

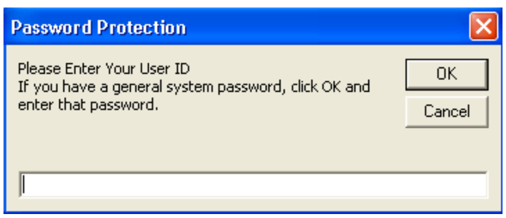
Adding A User To The System

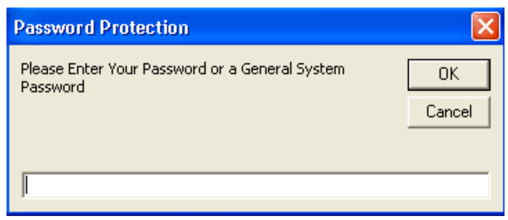
There are no predefined users in the Contact Sage Pro system. For the system to recognize a user, that user must be added to the user database. You need the user ID from Windows to enable the system to automatically recognize a user. After a user clicks START (password protection system must be on- see below), the Contact Sage Pro displays: (only if the user is not in the user database)



User ID (Windows user ID) was not recognized

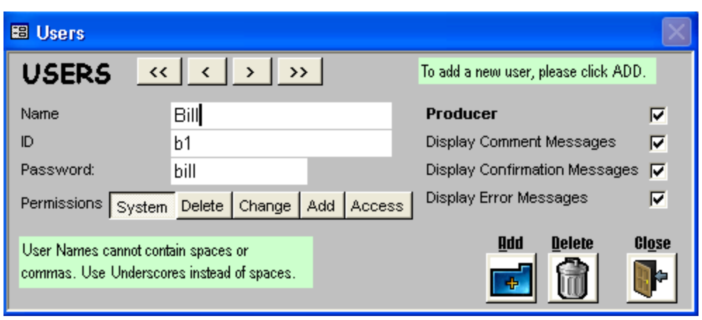
The text between User ID and "was not recognized" is the user ID from Windows. You should write down this ID. After you click OK, a password entry box appears. The first pop up box asks for the user ID, the second pop up box asks for the associated password. If you want to enter a generic password, press OK on the first box without entering anything, and then enter the generic password in the next box.





The default password is SYSTEM. Passwords are not case sensitive.

New users are added on the Users screen opened from the Utility Menu. To get to the Users screen, you should click UTILITIES from the Main Menu and then click USERS.



From the Users screen, you should click ADD. You should now fill in the Name, ID, and Password boxes. The Name box is used to enter a name that a user will be prompted with to verify their identity. (You cannot have **spaces** or **commas**. Use underscore instead of space.) The ID box should be filled in with the user ID from Windows that you wrote down earlier. The Password box should be filled with a user specific password that a user must enter to start the Contact Sage Pro system. The Permissions selection controls which Contact Sage Pro functions the user can use. The first user entered into the user database should give themselves SYSTEM permission.

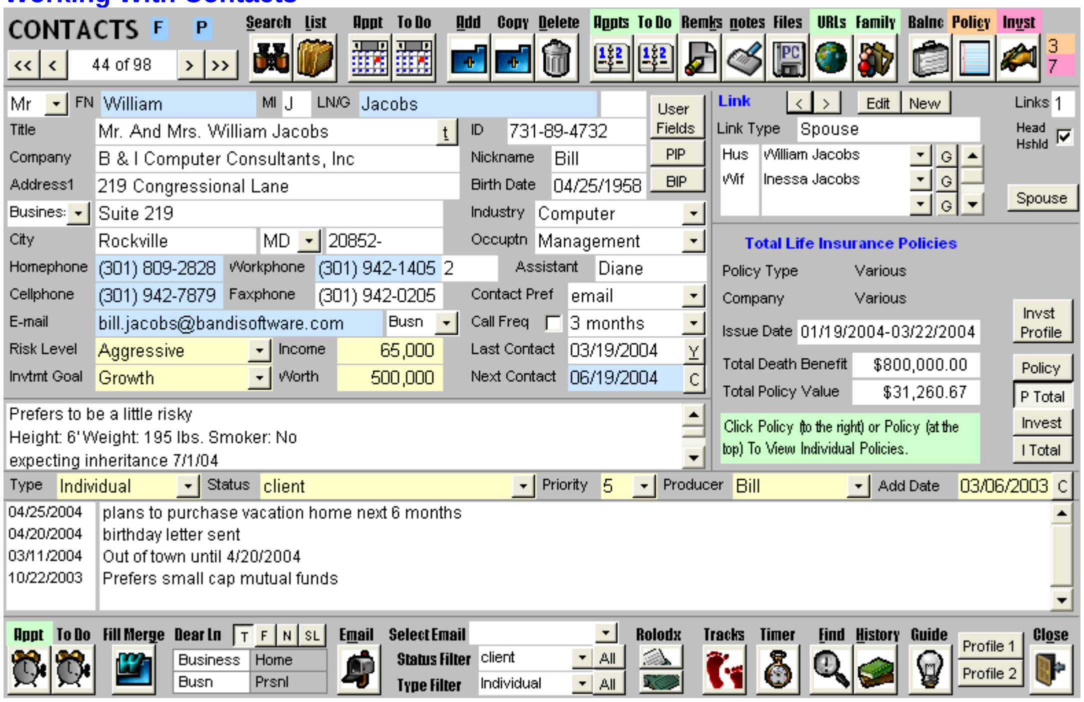
If the first user does not give themselves SYSTEM permission, they will not have access to the setup and user areas the next time they enter the system. To change an incorrect permission setting, you should run the Contact Sage Pro and click NO when the system recognizes you and asks to confirm your identity. You should press enter when the user id box appears, and enter SYSTEM in the next box. You should then re-enter the Users screen and change the settings.

To exit the Users screen, click CLOSE. Click CLOSE on the Utility Menu screen to return to the Main Menu.

Deleting A User From The System

Following the same procedure as adding a user to get to the Users screen, but clicking DELETE from the Users screen will remove the currently displayed user from the Contact Sage Pro system.

Working With Contacts



Adding A Contact To The System

After you have opened and entered the Contact Sage Pro System, the Contact Information Screen is accessible through the Main Menu.

If you click CONTACTS from the Main Menu and the Appointment Reminder screen appears, the system is reminding you of scheduled appointments in the system that are due. Click CLOSE to exit the screen.

To add a new contact to the system, click ADD from the menu at the top of the Contact Information Screen. The cursor will automatically go to the salutation box. To move between the boxes, use the mouse or press Tab. You can either enter a contact ID or let the system generate a contact ID. The system will only generate a contact ID if you haven't entered a contact ID and you have entered at least a last name and a home or work telephone number for the current contact.

To use the APPS (appointments), NOTES, REMARKS, URL, Family, or CREATE ACCOUNT buttons, there must be a contact ID in the contact ID box.

If you exit the Contact Information Screen before a contact ID has been entered for the current contact, the current contact will not be accessible for reports and searches. This is done to prevent empty records (a record is a contact in the program) from appearing.

Deleting A Contact From The System

To delete the currently displayed contact from the system, click DELETE on the Contact Information Screen. Note that deleting a contact is irreversible and deletes all notes, remarks, appointments, investments, policies, and links (URL, File, etc) for the current contact.

Adding A Contact Note To The System

From the Contact Information Screen, notes can be added for any contact who has a contact ID. Notes can only be added for the currently displayed contact. Once you have scrolled or advanced to the desired contact, click NOTES. The top left of the notes screen will show the contact name.

To add a new note to the system for the current contact, click ADD from the menu at the bottom of the Notes screen. This opens the expanded notes screen. The system prefills the current date and time, and the cursor moves to the note box. The note entered on the expanded note screen can be unlimited in length and can include carriage returns. If the note is edited on the Notes screen, a carriage return cannot be entered within the note.

Once you have finished adding the note, click CLOSE.

Deleting A Contact Note From The System

To delete the currently displayed contact note from the system, click on the desired note row and then click the DELETE button on the menu at the bottom of the Notes Screen.

Adding A Contact Remark To The System

From the Contact Information screen, remarks can be added for any contact who has a contact ID. Remarks can only be added for the currently displayed contact. Once you have scrolled or advanced to the desired contact, click REMARKS. The top left of the remarks screen will show the contact name.

To add a new remark to the system for the current contact, click ADD from the menu at the bottom of the Remarks screen. After ADD is clicked, the cursor moves to the remark box for the new remark.

Deleting A Contact Remark From The System

To delete the currently displayed contact remark from the system, click on the desired remark row and then click the DELETE button on the menu at the bottom of the Remarks Screen.

Adding An Appointment To The System

You can open the Appointment Screen in two ways. The first way is to click the APPTS button from the top menu of the Contact Information Screen. This will show all appointments in reverse chronological order for the currently displayed contact. The second way is to click on a day from the Calendar screen to show appointments for that day. From the appointments list, click ADD to add a new appointment. Depending on whether the Appointments Screen was opened from the Contact Information Screen or the Calendar screen, the expanded appointment screen will open with either the appointment contact or appointment date (and time if a tick above the white and red appointments bar was clicked) filled, respectively.

You can then enter the appointment date, appointment time, appointment duration, appointment type, appointment contact, and appointment description. You can choose to fill any of the appointment boxes, however the appointment date must be filled or the appointment will not be accessible. This is done to prevent blank appointments from being displayed. The appointment description entered or edited through the expanded appointment screen can be unlimited in length and can include carriage returns. If the appointment is edited on the Appointments screen, a carriage return cannot be entered into the appointment description.

If you enter an appointment contact, and the appointment is in the future, that appointment will be counted for that contact on the Contact Information Screen.

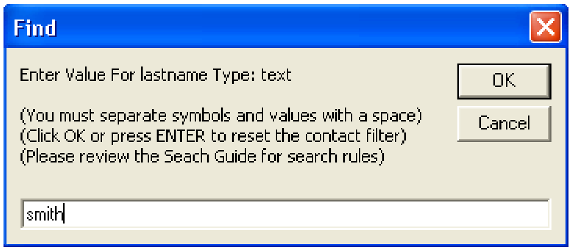
Once you have finished entering the appointment information, click CLOSE to return to the Appointments Screen or the Calendar depending on where you opened the Expanded Appointment screen from.

Deleting An Appointment From The System

To delete the currently displayed appointment from the system, click on the desired appointment row and then click the DELETE button on the menu at the bottom of the Appointments Screen.

Searching For Contacts By Entering a Single Piece of Data (Click Search Guide to see the search commands)

The Find box can be opened from the Contact Information screen by clicking in any white box and then clicking FIND.



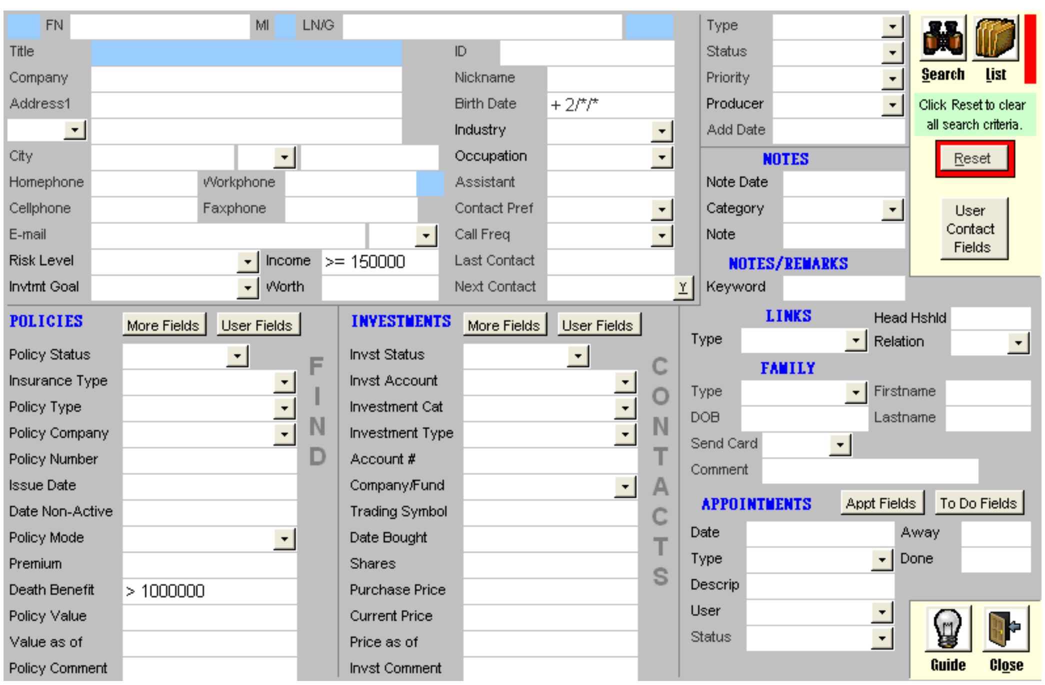
Search Examples: (you must first click in the field (data box) you want to search in and then click Find)

To find all contacts who have a last name beginning with D, click in last name, click on FIND and then type D in the pop up box. To find all contacts who have a priority of 1, 2, or 3, click in priority, click on FIND and type <= 3 in the pop up box.

The Search Guide gives more search examples.

If the system finds only one contact, the system goes to that contact without filtering the records. If more than one contact is found, the contact information screen is filtered with the result. (You can determine if the contact information screen is showing a filtered contact list by looking for a blue F next the record counter at the top left of the screen.)

Searching For Contacts by Entering Several Pieces Data (Click Search Guide to see the search commands)



The Find Contacts screen can be opened from the Contact Information screen by clicking the SEARCH button. You can enter values in any of the white boxes on the Find Contact screen. If you fill in more than one white box, the combination of values in the white boxes is searched for.

Search Examples:
To find all contacts who have a last name beginning with D, live in Maryland, are Clients, and own a bond, type D in the last name box, select MD from the state list, pick Client from the status list, and type BOND in the investment type box.

To find all contacts who live in Virginia, are Clients, and have a priority of 1, 2, or 3, select VA from the state list, pick Client from the status list, and type <= 3 in the priority box.

To find all contacts who have 622 in their home telephone number, type *622 in the home phone box.

After you enter search criteria, click SEARCH.

If the search criteria returns only one contact, that contact is displayed on the Contact Information screen. If more than one contact is found, the contacts are listed alphabetically on the Contact List screen.

Adding Contact Family Information

There are two ways to add contact family members. If you only want to store the name, birth date, and short comment for the family member, you can click Family on the Contact Information screen and enter the information directly into the table that will replace the Notes area. (click Family again to view Notes.)

If you want to store more detailed information for a family member including addresses, phone numbers, notes, remarks, appointments, etc, you should create a separate contact for that family member and link the contacts. In the Contact Sage Pro, you can click Duplicate to copy contact information to a family member and automatically create a link.

Storing A Contact Group

You can store a contact group for use in group e-mailings, reports and mail merges. Once a group is stored, it can be recalled on the Contact List screen.

To store a group, the system must first display some contact list on the Contact List screen. The Contact List can be displayed through a Find Contact search that returns multiple contacts, or by going to the Contact List screen and displaying all the contacts.

The next step is to turn on the list function by clicking the Turn List Function On button. Click YES to replace the search criteria. Once the list function is on, there will be an empty checkbox to the left of each contact. To select all of the contacts listed for the new group, click the SELECT ALL button, or individually check the desired contacts.

Once all of the desired contacts are checked, you should type in a new group name in the white box to the left of ADD, and then click ADD.

To use the group for reports and mail merges, the group must be recalled on the Contact List screen and the list function must be turned on for the recalled group, in addition the user should click the SELECT ALL button to check all of the contacts. To recall the group, simply select the group name from the list box at the bottom of the Contact List screen. You should then click the Turn List Function On button to turn on the list function, and click the SELECT ALL button to check all of the contacts in the group.

Performing a Mail Merge with a Group

Before the mail merge feature can be used, you must enter the filename and path for the desired mail merge files. The demo merge file is pre-entered in the system.

To use the mail merge feature, you must save a group list into the mail merge database. This can be done by either performing a new search or recalling a group list. Once the desired contacts are on the Contact List screen, you should turn on the list function by clicking the Turn List Function On button. You should then check the contacts that you want to use for the mail merge. You should then click FILL MERGE to save the checked contacts to the mail merge table.

A Mail Merge Files List screen then appears displaying the available mail merge files that can be run from the system. The user should click OPEN to the right of the desired file.

To finish the mail merge, click the **Merge** button in the center top area of Microsoft Word. (In Word XP, there is an icon to Merge.)

Adding New Mail Merge Files

The Contact Sage Pro can fill out form letters created in Microsoft Word. The following contact information can be automatically filled in on the form letter for the contacts that you select:

- Title, or if title is empty, (Salutation + First Name + MI + Last Name + Suffix)
- Company
- Address Line 1
- Address Line 2
- City, State, Zip and
- Dear Line
- Next Contact Date
- Next Appointment Date and Time
- All user defined fields

We include a demo form letter that is setup to fill in the contact information. To create other form letters, simply copy the demo letter as many times as you want, and edit the copy to read whatever you would like.

To copy the demo, do the following:

1. Click the My Computer Icon on your Windows Desktop (Figure A)
2. Click on C: or Local Disk C: (Figure B)
3. Click on the cisagemailmerge folder (Figure C)
4. Right click on the mailmergedemo file (Figure D)
5. Select Copy
6. Right click on any blank area and select Paste (Figure E)

Figure A

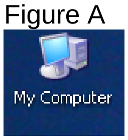


Figure B

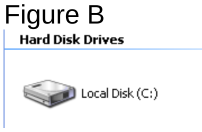


Figure C

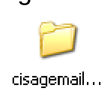


Figure D

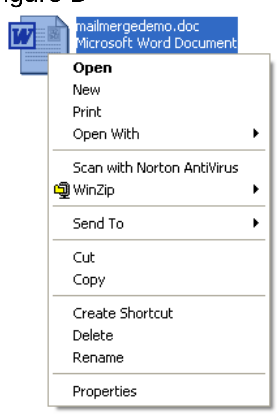
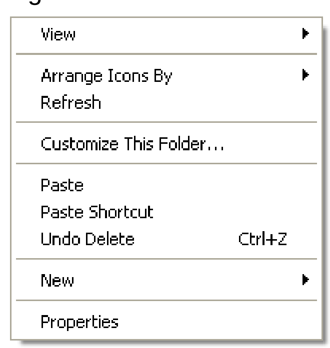


Figure E



A New File called “Copy of mailmergedemo” will be created (Figure F.) You should now rename the new file by:

1. Right click on the new file
2. Select Rename (Figure D)

3. Rename the file to any meaningful name (keep in mind that you cannot have **spaces** or **quotes** in the name) (Figure G)
4. Press Enter

Figure F

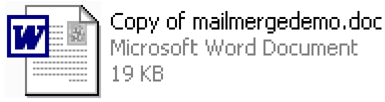
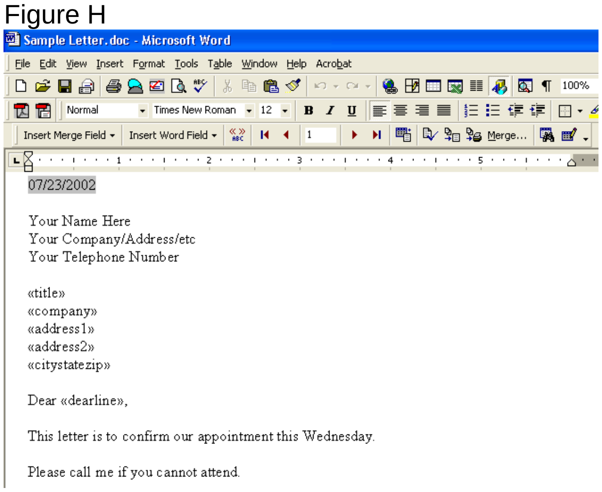


Figure G

After the new file has been renamed, you can now edit it to read whatever you would like by:

1. Double click the file to open it in Microsoft Word
2. Once Word opens, change the file to read whatever you would like (Figure H)
3. Keep in mind that the text surrounded by << >> is the area for the contact information in the form letter
4. Once you are done, click File then Save
5. Exit Microsoft Word

Figure H



After you have copied, renamed, and edited the file, you must tell Contact Sage Pro that the file exists so that you will be able to automatically open it in the mail merge/form letter function.

To add the file to the Contact Sage Pro, do the following:

1. Start the Contact Sage Pro
2. Click Utilities from the Main Menu
3. Click Word Merge Files (Figure I)
4. Click Add (Figure J)
5. Type in a meaningful display name for the file (eg. portfolio review)
6. Select the file from the drop list in the second column (Figure K)
7. Click Close

Figure I

Figure J

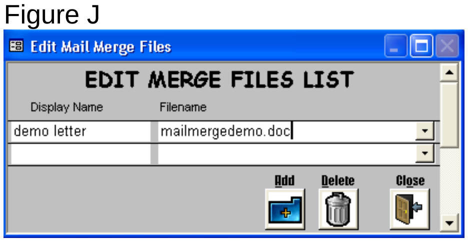
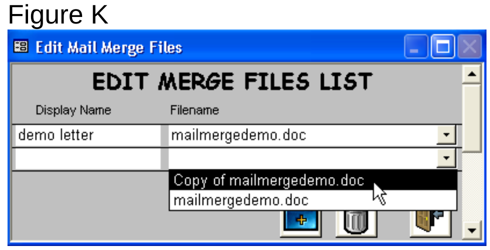
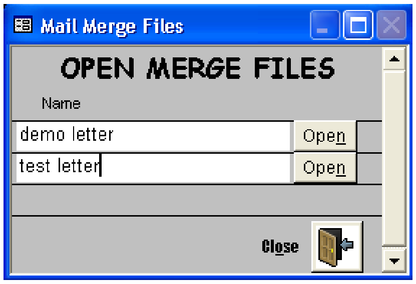


Figure K



You are finished.

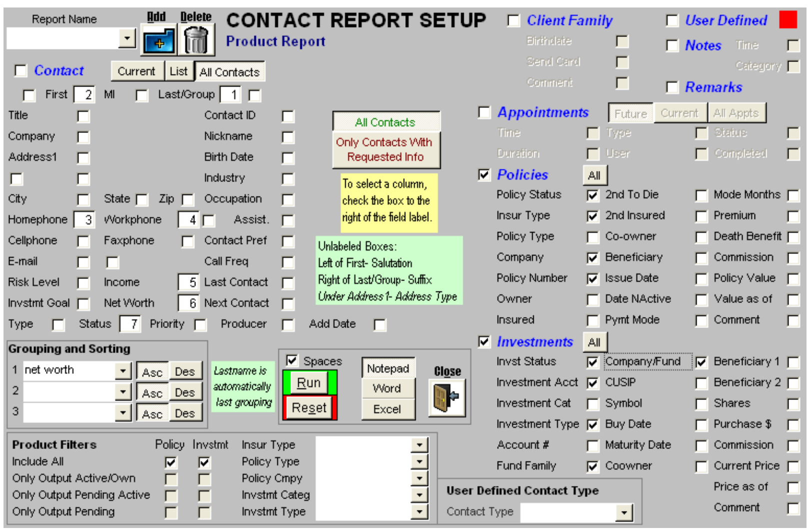
Now whenever you select contacts and click Fill Merge, the new file will appear in the Open Merge Files box.



Sending Out Email to a Group

To send an email to a contact group, you can either start a new search or recall a group list. Once the desired contacts are on the Contact List screen, the user should turn on the list function by clicking the <u>Turn List Function On</u> button. The user should then check the contacts that they want to use for the emailing. You can then select an email. The system uses blind copy- BCC to send the email to all the recipients. To open the default email program, click <u>EMAIL</u>.

Running A Contact Report



To run a contact report, open the Report Setup screen. From the Main Menu screen, click <u>REPORTS</u>, then click <u>Contact Report</u> from the Report Menu screen.

The system can run Contact, Appointment, Note, Remark, and Product (dependent on version) reports. All of the reports display contact information followed by the requested data. To select a report type, click on the checkbox to the left of the Contact, Appointments, Notes, Remarks, or Product labels (you can select only 1 blue report type except for Policies and Investments which are treated as 1 type).

To select which contact fields you want in the reports and the order that the fields should appear in, click the checkboxes to the right of the contact fields. (An example of a contact field is First, Last Name, or Priority.) When a checkbox is clicked, is replaced by a box with a number. The number specifies the column order that the field will appear in the report. All contacts fields that have a number will appear in the report.

Report Examples:
To print a report of all the contacts stored in the system and their appointments, click the checkbox to the left of the Appointments label, check any of the desired fields under the Appointments label, choose <u>ALL</u> from the selector above the Appointments label, choose <u>All Contacts</u> from the selector to the right of the Contact label, choose <u>ALL Contacts</u> from the selector below the Last Contact label, and check all desired contact fields.

Next, click the <u>RUN</u> button.