CONTACT Sage Manual (Contact Management For Sales Professionals)
Version 1.75

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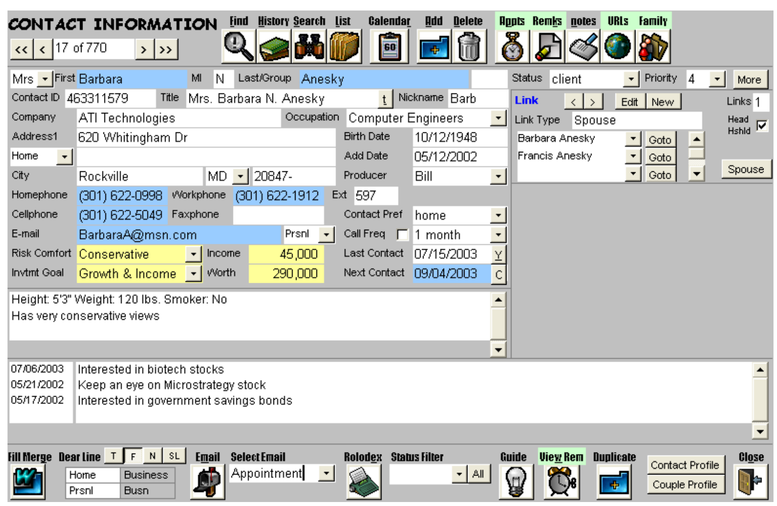

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Introduction:
The Contact Sage is the easiest to use, most feature rich contact management system available for sales professionals. It is a simplified system designed to save time and increase productivity for sales professionals with any level of computer skills or experience. The Contact Sage interfaces with Microsoft Office and is written in Microsoft Access. This means that once your computer has Microsoft Access installed on it (we even include a version of Microsoft Access Runtime with the Contact Sage), no other software installation is necessary. Because of its design, the Contact Sage is also compact and self-contained, allowing for easy and quick backups.

To ensure that our product will meet your needs, the Contact Sage design team included inside and outside sales professionals, and top-notch programmers and designers. (All of our programmers hold masters degrees in software engineering or computer science.) In addition, the Contact Sage was written following the highest Software Engineering Institute Standards. The Contact Sage will never become obsolete because Microsoft Access is backward compatible with previous versions, meaning that the system will be compatible with all future versions of Microsoft Access and Microsoft Office.

Features: (“system” refers to the Contact Sage)

- store **contact information** including full name, nickname, 2 full addresses, home/work/fax/cell phone numbers, preferred contact method, Social Security number/tax ID number, birth date, status (lead/client/user selectable), priority (for grouping or searching contacts), 2 email addresses, producer, risk tolerance, investment goal, income, net worth, contact dates and more
- store **family member information** including birthdates and comments
- **22 searchable user defined fields** (5 text/3 date/6 number/8 checkbox)
- store **notes and remarks** for each contact (notes are automatically date/time stamped)
- store and open unlimited **file links** from the system
- store and open unlimited **URL links** from the system
- daily activities screen with today’s birthdays, appointments, and full **To Do List**
- set up and monitor **appointments** (if appointment is with a contact, system can automatically update that contact’s notes with the appointment details)
- **monthly calendar interface** for setting up and reviewing appointments
- **appointment reminder** system through pop-up windows
- printout daily appointment schedule
- set up **links between contacts** (lets you link family/coworkers/etc.)
- duplicate selected contact information for spouses, etc
- set up **unlimited producers** and assign contacts to them
- automatically filter contacts and appointments by producer
- automatically track status change dates for contacts (used to **track contact/client progression** through client acquisition process)
- **find contacts through any combination of information stored in the system** (contact/ /note/remark/appointment/user defined fields)
- scroll through the contact list returned from the search function
- simultaneously perform 2 searches
- **automatically fill in e-mail address/subject/body** for a contact or a contact group into the default windows e-mail program (Microsoft Outlook/Outlook Express/etc.)
- **interface with group email programs** to send personalized emails to contacts
- automatically fill contact information into **Microsoft Word mail merge documents** accessed through the system
- user selectable **contact report generator** that lets you create a grouped contact based report with/without contact notes, remarks, or appointments, that are output to Microsoft Notepad, Word, or Excel (you can select which information is output and also the order that the information is arranged in for all reports)
- **automatically backup database** daily/weekly
- set up email addresses/subjects/bodies, mail merge files
- full database cleanup and management utilities
- arrange **unique contact data display for each system user**
- **password protect the system** with general passwords (different passwords to control user access to system functions), or user specific passwords
- **dial any telephone number** on the screen (requires a modem)
- **networkable out of the box**
- **synchronize all system data with your Palm or Pocket PC PDA**

To facilitate ease-of-use, the Contact Sage does not have a traditional Windows menu system and can be used without a mouse. The normal horizontal menu at the top of the screen has been replaced by an on-screen function limited icon system. You can only access system functions that are on the screen, meaning that you will never again have to waste time looking for functions in multiple menus.

CONTACT Sage Information:
Most contact system data can be loaded into the Contact Sage. Because contact system data varies in form depending on the contact system, B & I Computer Consultants will transfer contact system data into the Contact Sage for a nominal fee.

Hardware requirements:
The Contact Sage works through and requires Microsoft Access 2000 or newer. The system itself is distributed on a CD-ROM that includes the Contact Sage program, Contact Sage Backup program, sample word letter, Contact Sage Manual, User's Guide, and a version of Microsoft Access 2000 Runtime and 2002/XP Runtime in the event that you do not already have Microsoft Access 2000 or newer.

The recommended system requirements are:
a) 233 MHz Pentium class machine or higher
b) 64 MB of RAM or higher
c) Windows 95 or newer

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, 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.

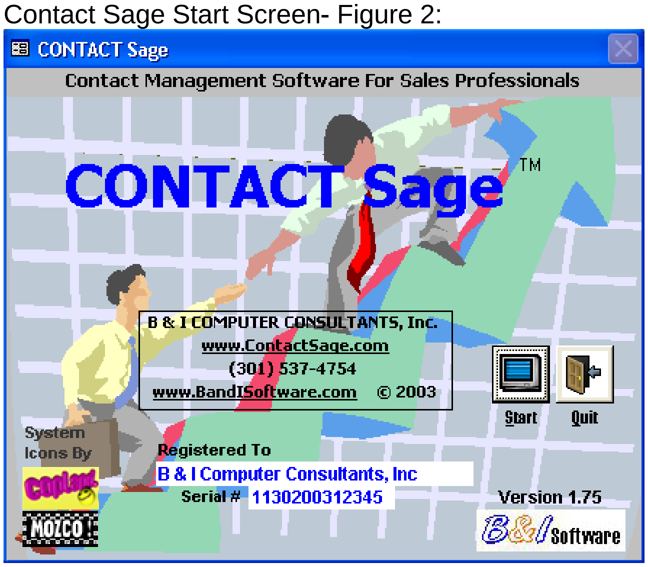
CONTACT Sage Manual (Contact Management System)

Controls:
A mouse is not needed to use the Contact Sage.
Tab: move in between fields and buttons
F6: switch panes (panes are sections of the screen separated by horizontal grey lines)
Alt + letter under button: click that button
Alt + down arrow: see drop down box choices

Common Functions- Figure 1:

All Contact Sage screens have a common menu at the top of the application window. The button functions are:
<u>Dial Number:</u> Dials highlighted telephone number (requires a modem)
<u>Save Settings:</u> Saves resized screens (to resize a screen, simply click on the screen border and drag it up or down)
<u>Undox:</u> Undoes last data change
<u>Fill Color:</u> Changes backcolor of text boxes on form design screen
<u>Help:</u> open the Contact Sage help web page

Contact Sage Start Screen- Figure 2:



This is the first screen in the Contact Sage system. For the automatic backup to function, you must exit the Contact Sage from this screen.
<u>Quit:</u> closes the Contact Sage
<u>Start:</u> has two functions:

- recognize the user, ask for a user password, and assign appropriate permissions, or if the user is not recognized, ask for the user and their password, or a general system password (discussed in password entry screen below)
- open the main menu

Figure 3:

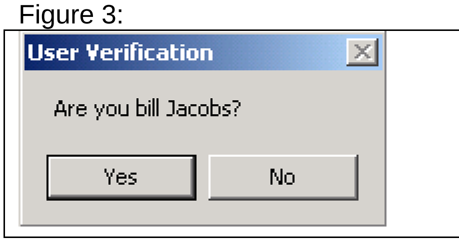
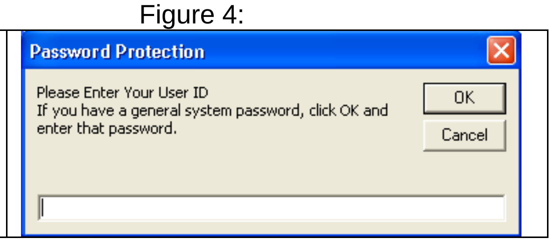


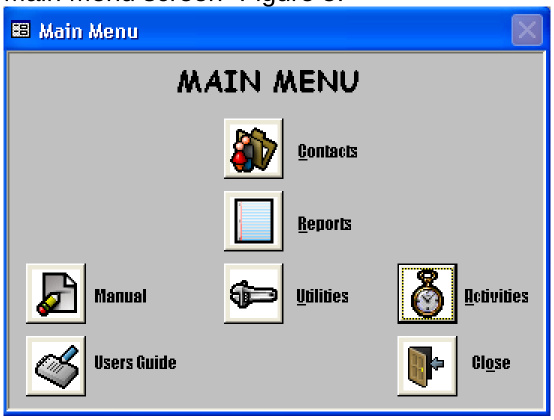
Figure 4:



The administrator (or any user who has system permission) has the option of password protecting the Contact Sage. (discussed in the utility section)

If the administrator password protects the Contact Sage, the system will automatically determine who is logged on to the PC from which the system is run. If that user has been entered into the system (discussed below in the utility section), the password entry box will pop up asking for that user's password. If the user is not recognized by the system, the password entry box pops up asking for the user id of the current user. If the user types in an invalid username and/or password, the system will ask the user if they would like to try again. The user has 3 chances to enter a valid password. After each invalid password entry, the user is given the option to quit the Contact Sage.

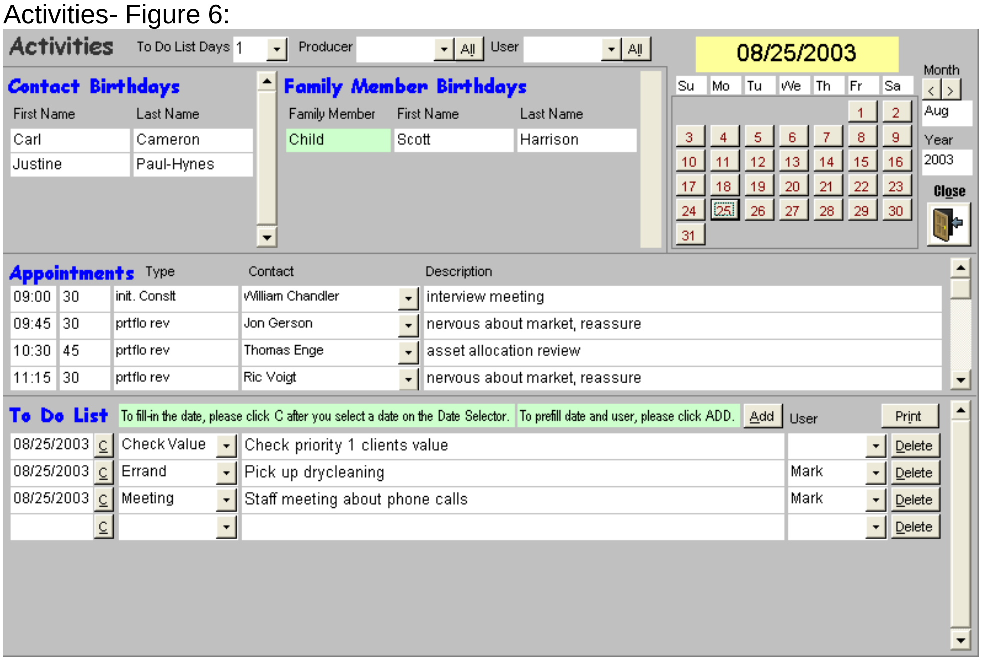
Main Menu screen- Figure 5:



From this screen, you can choose to look at contact data, daily activities, enter the report menu, or enter the system utilities menu. The system utilities menu will only display options that you have permission to choose (see password protection above).
Activities: opens the Activities screen
Contacts: opens the contact information screen
Reports: opens the report menu
Utilities: opens the utilities menu
Close: goes back to the start screen

If you want to open the program manual or user's guide, make sure that the Microsoft Word directory is correct on the Setup Screen. (You can click Automatically Fill-In File Directory Settings to verify that the directory settings on the Setup screen are correct.)

Activities- Figure 6:



The Daily Activities screen shows what needs to be done for the current day. Birthdays for contacts and family members, appointments, and a to do list are all tied to the date displayed in yellow at the top right of the screen.

You can change the current date being shown by clicking a new day from the calendar in the top right of the screen.

Contact Birthdays show birthdays for the date shown for contacts only. Family Member Birthdays show birthdays from the Family List for the date shown. To access the Family Member Birthday list, you should search the Family criteria on the Find Contacts screen.

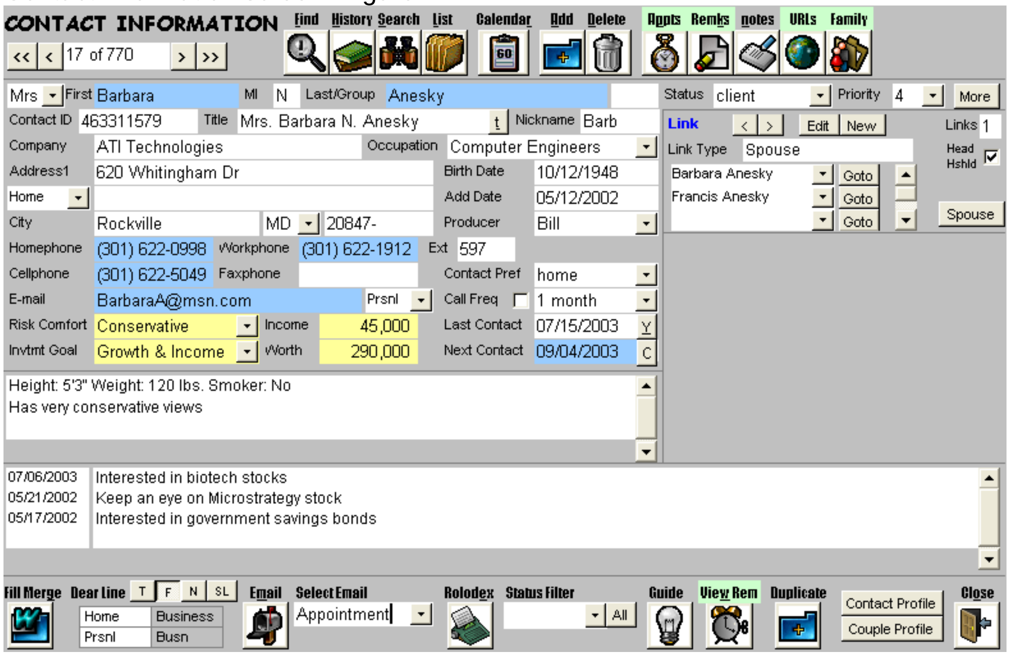
The To Do List Days drop box lets you select the date range for the to do list. If you select a number greater than 1, the to do list will show dates between the current date shown and the selected days after the date shown. If you select All, all to do items will be displayed regardless of the date shown. The to do list is grouped by date and to do type.

The Producer selector works on birthdays and appointments only. You must assign contacts to a producer for the correct birthdays and appointments to appear once a producer is selected. Once you assign a contact to a producer, all of the contact's appointments are automatically assigned to that producer.

The User selector works on the To Do List only. The To Do List will automatically assign a User to each new to do item if that User is signed in. (Please see the Password and User Section.) You must select a user for each to do item for them to appear once a user is selected.

With the exception of the to do list, all information on this screen cannot be edited or changed. If you want to send all contacts with a birthday a form letter or an email, you should perform a search on the Find Contacts screen, use the List Function on the Contact List to select contacts, and then use the fill merge, or built in email system or group email to send the email.

Contact Information screen- Figure 7:



This screen shows individual contact information, client link information, and selectable notes and remarks. From this screen, you can access the appointments, remarks, notes, and URL links for the current contact (the contact currently displayed,) and open the find contact and calendar screens. All of the mentioned screens will be discussed in their sections.

There are command buttons along the top and bottom of the screen. The command buttons on top have the following functions:

<< brings up the first contact in the list (alphabetical or by next contact date depending on the filter entered)
< brings up the previous contact in the list
> brings up the next contact in the list
>> brings up the last contact in the list

Find: opens the find box (below)

Figure 8:

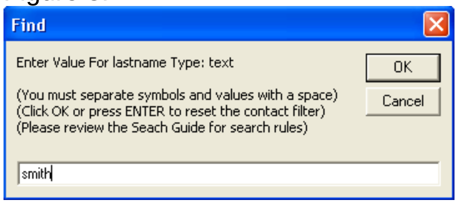


Figure 9:

If a search is performed and contacts are filtered, a blue F for filtered appears next to the contact selectors. If a search by next contact date is run from the Find Contacts screen, the contacts are ordered by next contact date in reverse chronological order and a blue O for ordered appears.

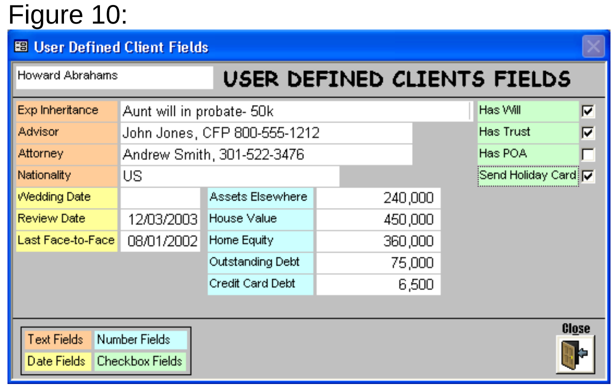
Please refer to the search guide for search rules. (At the end of this manual.)

History: opens the Find History screen that keeps a list of all previous Find box searches
Search: opens the Find Contacts screen (discussed below)
List: opens the Contact List screen filtered by criteria in the Find Contacts screen, or lists all of the contacts in the system
Calendar: opens the Calendar screen (discussed below)
Add: clears the screen to add a new contact
Delete: removes the current contact as well as all related contact information from the system. It is very important that you understand that the delete button not only removes the contact's information from the system, but also removes all links, appointments, remarks, and notes that belong to the contact from the system, and is irreversible
Appts: opens the appointments screen and displays the appointments for the current contact in reverse chronological order (if the Appts label is green, there are future appointments scheduled with the current contact.)
Remarks: opens the remarks screen for the current contact (if the Remarks label is green, there are remarks for the current contact that are not shown on this screen.)
Notes: opens the notes screen for the current contact (if the Notes label is green, there are notes for the current contact that are not shown on this screen.)
URLs: opens the URL link screen for the current contact (if the URLs label is green, the current contact has URL links.)
Family: replaces the notes area with a list of family members for the current contact. Clicking this button toggles the Notes area between displaying notes and family members. (If the Family label is green, the current contact has Family member information in the system.)(Figure 25)

More: (top left) opens the user defined fields screen for the current contact. (The fields types are color coded)

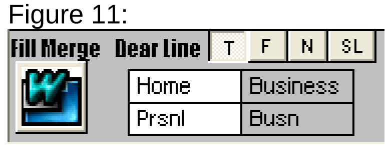
User defined fields can only be printed out in the profile reports.

Figure 10:



Fill Merge:
fills a table with the name/address, contact dates and user fields for the current contact. (Microsoft Word accesses the filled table for the mail merge feature. This feature is explained in the Contact List section.)

Figure 11:

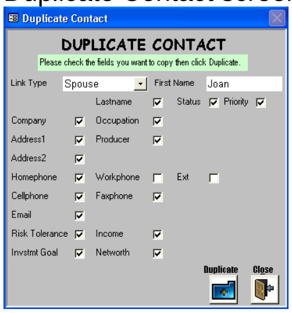


Mail Merge Dear Line – selects the form of the dear line in the mail merge letters- T (Title), F (First name), N (Nickname), SL (Salutation + Last name)
Address Choice- you can store 2 different addresses in the Contact Sage for each contact. Home/Business in the top row of figure 11 lets you choose which address to use for labels, mail merges, and reports for the current contact. Each of the 2 addresses can be individually named in the combo box under the Address label. The system will automatically use the last clicked address column for reports, labels, and form letters.
Email Choice- you can store 2 different email addresses in the Contact Sage for each contact. Pers/Bus in the bottom row of figure 11 lets you choose which address to use for system emails and reports involving the current contact. Each of the

2 email addresses can be individually named in the combo box to the right of the email entry box. The system will automatically use the last clicked email column for email functions and reports.
E-mail: opens the default e-mail program and prefills the e-mail address for the current contact and the subject and body selected.

Rolodex: displays the lastname rolodex in the notes area. Picking a letter filters the contacts by lastname.
Status Filter: filters the contacts by status.
The filters can be used together or separately. You can use the arrow buttons at the top left of the screen to advance through the filtered contact list. The All buttons removes the last name filter and the status filter, respectively.
Search Guide: displays the field search rules
View Rem: opens the appointment reminder screen if there are current appointments in the reminder queue (if the View Rem label is green, there are current appointment reminders in the system.)

Duplicate Contact screen- Figure 12:

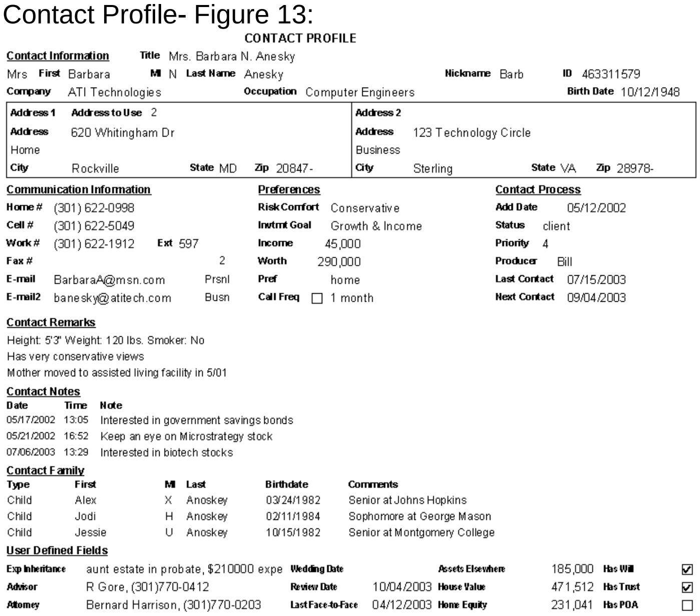


Duplicate: lets you copy a contact by selecting fields to duplicate, selecting a link type automatically creates a link between the original and new contact

Contact Profile: at the bottom right of the screen opens a profile preview for the current contact that includes all contact information stored in the system (figure 13)
Couple Profile: opens a profile preview for the current contact and spouse that includes all contact and spouse information stored in the system (figure 14)

Close: goes back to the main menu.

Contact Profile- Figure 13:



CONTACT PROFILE

Contact Information Title Mrs. Barbara N. Anesky
Mrs First Barbara MI N Last Name Anesky Nickname Barb ID 463311579
Company ATI Technologies Occupation Computer Engineers Birth Date 10/12/1948

Address 1 Address to Use 2
Address 620 Whitingham Dr
Home
City Rockville State MD Zip 20847-

Address 2
Address 123 Technology Circle
Business
City Sterling State VA Zip 28978-

Communication Information
Home # (301) 622-0998
Cell # (301) 622-5049
Work # (301) 622-1912 Ext 597
Fax # 2
E-mail BarbaraA@msn.com Prsnl
E-mail2 banesky@atitech.com Busn

Preferences
Risk Comfort Conservative
Invtmt Goal Growth & Income
Income 45,000
Worth 290,000
Pref home
Call Freq ☐ 1 month

Contact Process
Add Date 05/12/2002
Status client
Priority 4
Producer Bill
Last Contact 07/15/2003
Next Contact 09/04/2003

Contact Remarks
Height: 5'3" Weight: 120 lbs. Smoker: No
Has very conservative views
Mother moved to assisted living facility in 5/01

Contact Notes

Date	Time	Note
05/17/2002	13:05	Interested in government savings bonds
05/21/2002	16:52	Keep an eye on Microstrategy stock
07/06/2003	13:29	Interested in biotech stocks

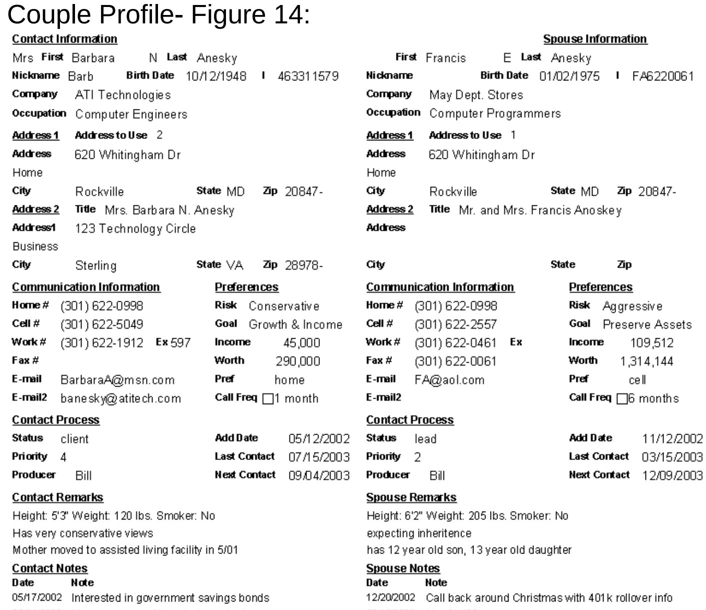
Contact Family

Type	First	MI	Last	Birthdate	Comments
Child	Alex	X	Anoskey	03/24/1982	Senior at Johns Hopkins
Child	Jodi	H	Anoskey	02/11/1984	Sophomore at George Mason
Child	Jessie	U	Anoskey	10/15/1982	Senior at Montgomery College

User Defined Fields

Exp Inheritance	aunt estate in probate, $210000 expe	Wedding Date		Assets Elsewhere	185,000	Has Will	☑
Advisor	R Gore, (301)770-0412	Review Date	10/04/2003	House Value	471,512	Has Trust	☑
Attorney	Bernard Harrison, (301)770-0203	Last Face-to-Face	04/12/2003	Home Equity	231,041	Has POA	☐

Couple Profile- Figure 14:



Contact Information
Mrs First Barbara N Last Anesky
Nickname Barb Birth Date 10/12/1948 I 463311579
Company ATI Technologies
Occupation Computer Engineers
Address 1 Address to Use 2
Address 620 Whitingham Dr
Home
City Rockville State MD Zip 20847-
Address 2 Title Mrs. Barbara N. Anesky
Address1 123 Technology Circle
Business
City Sterling State VA Zip 28978-

Communication Information
Home # (301) 622-0998
Cell # (301) 622-5049
Work # (301) 622-1912 Ex 597
Fax #
E-mail BarbaraA@msn.com
E-mail2 banesky@atitech.com

Preferences
Risk Conservative
Goal Growth & Income
Income 45,000
Worth 290,000
Pref home
Call Freq ☐1 month

Contact Process
Status client Add Date 05/12/2002
Priority 4 Last Contact 07/15/2003
Producer Bill Next Contact 09/04/2003

Contact Remarks
Height: 5'3" Weight: 120 lbs. Smoker: No
Has very conservative views
Mother moved to assisted living facility in 5/01

Contact Notes

Date	Note
05/17/2002	Interested in government savings bonds
05/21/2002	Keep an eye on Microstrategy stock

Spouse Information
First Francis E Last Anesky
Nickname Birth Date 01/02/1975 I FA6220061
Company May Dept. Stores
Occupation Computer Programmers
Address 1 Address to Use 1
Address 620 Whitingham Dr
Home
City Rockville State MD Zip 20847-
Address 2 Title Mr. and Mrs. Francis Anoskey
Address
City State Zip

Communication Information
Home # (301) 622-0998
Cell # (301) 622-2557
Work # (301) 622-0461 Ex
Fax # (301) 622-0061
E-mail FA@aol.com
E-mail2

Preferences
Risk Aggressive
Goal Preserve Assets
Income 109,512
Worth 1,314,144
Pref cell
Call Freq ☐6 months

Contact Process
Status lead Add Date 11/12/2002
Priority 2 Last Contact 03/15/2003
Producer Bill Next Contact 12/09/2003

Spouse Remarks
Height: 6'2" Weight: 205 lbs. Smoker: No
expecting inheritence
has 12 year old son, 13 year old daughter

Spouse Notes

Date	Note
12/20/2002	Call back around Christmas with 401k rollover info
02/12/2003	L/m 6/1/02

The entry boxes on the contact information screen are mostly self-explanatory. The following is an explanation of the more entry boxes. When you leave the mouse pointer on any of the entry boxes, a pop up note appears with a description of the entry box.

white box to the left of firstname: salutation for contact **white box to the right of lastname:** suffix for contact
Contact ID: Social Security number of contact or system generated ID consisting of contact name and telephone number (you must have a contact id to add notes, links, appointments, remarks, policies, and investments for the current contact.)
Preference: how the contact wishes to be contacted
Status: allows contacts to be categorized by contact, lead, other (other categories can be added on the Data Choices screen accessed from the utility menu.)
Priority: importance of contact (importance can refer to assets, potential, etc.) choices are 1-5

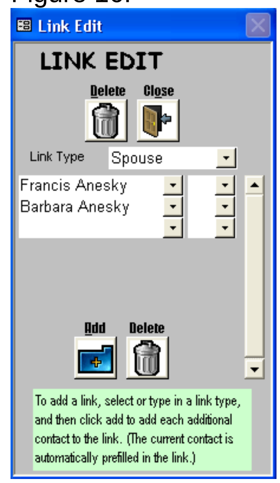
Call Freq: how often a contact should be called (depending on the setup screen options, call frequency can be used to automatically set up appointments)
list box under Address label: the address type for the current address

If the contact ID is changed, the system checks to make sure that the new contact ID is not a duplicate of an existing contact ID in the system. If the contact ID is a duplicate, you are informed.

The area of the screen between contact information and the bottom icons displays remarks and notes, respectively, which are checked to appear on the contact information screen.

Link area:
Figure 15:

Figure 16:



The contact link area displays relationships between contacts. These relationships can include spouses, family members, co-workers, etc.
<, > brings up the previous and next link, respectively

<u>New:</u> opens the link edit screen and readies it for link entry
<u>Goto:</u> goto the contact in the same row
<u>Edit:</u> opens the link edit screen with the current link (below)
<u>Spouse:</u> toggles between spouse records

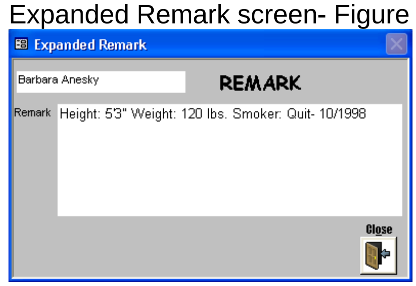
When adding a new link, the system will automatically add the last contact viewed to the link on the first contact row. Click Add from the bottom of the screen to add new contacts to the link, and then select the new contact in the next empty contact row. (The box to the right of the contact name on the Link Edit screen lets you select contacts by lastname.)

Link Edit: (Figure 16)
<u>Delete:</u> deletes the current link
<u>Close:</u> goes back to the contact information screen

(bottom of the screen)
<u>Add:</u> lets you add contacts to the current link
<u>Delete:</u> only works if the link has more than 1 contact. If the link has 1 contact, the link itself must be deleted. This is done so that orphan links cannot exist in the system.

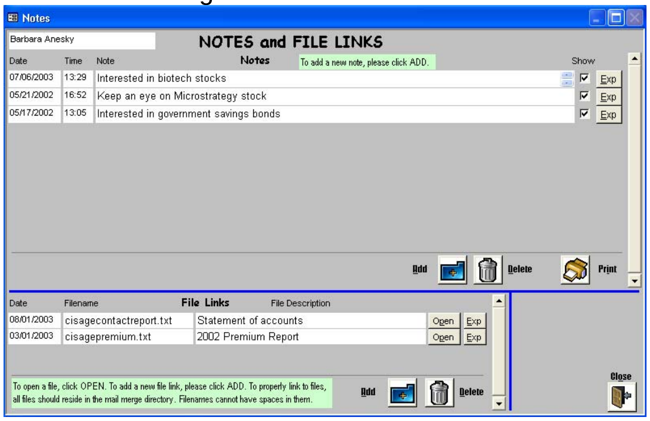
Remarks screen- Figure 17:

Expanded Remark screen- Figure 18:

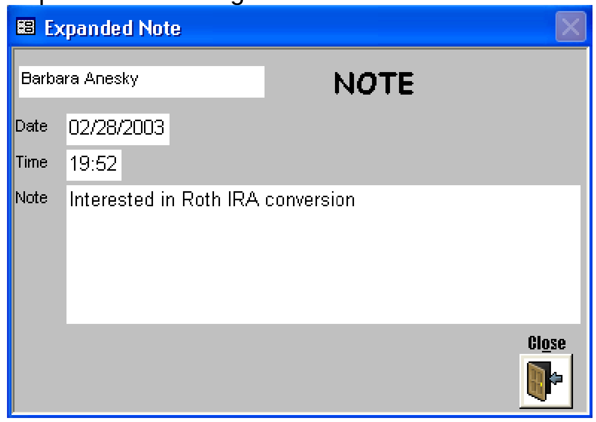


<u>Show:</u> displays the current remark on the contact information screen
<u>Add on this screen:</u> lets you enter in new remarks on this screen.
<u>Add on expanded screen:</u> lets you enter in new remarks on the expanded remark entry screen (carriage returns allowed)
<u>Delete:</u> deletes the current remark
<u>Print:</u> prints the remarks screen
<u>Close:</u> goes back to the contact information screen
<u>Exp:</u> displays the current remark on the expanded remark screen (figure 18)

Notes screen- Figure 19:

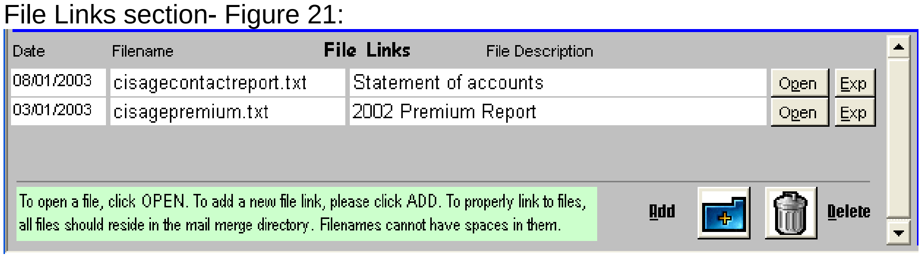


Expanded Note- Figure 20:

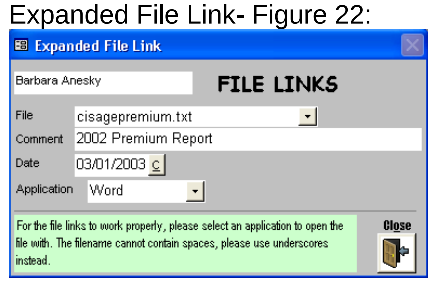


Show: displays the current note on the contact information screen
Add: lets you enter in new notes on the expanded note entry screen (carriage returns allowed)
Delete: deletes the current note
File Links: opens the File Link screen for the current contact (the color matched box to the right of the File Links button counts how many file links for the current contact are stored in the system)
Print: prints the notes screen
Close: goes back to the contact information screen
Exp: displays the current note on the expanded note screen (figure 20)

File Links section- Figure 21:



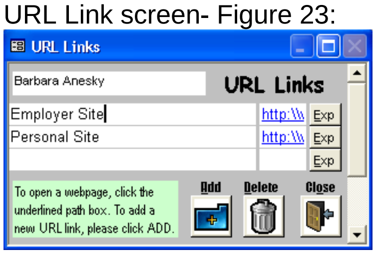
Expanded File Link- Figure 22:



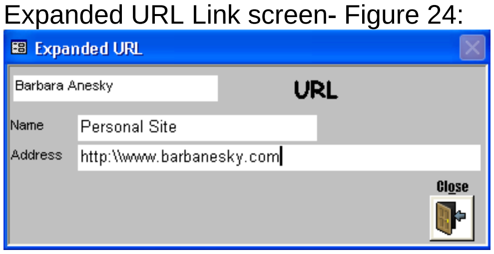
Open: open the file with the application selected on figure 22

File links let you associate files with contacts. You can link emails (that were saved in the email program,) documents (saved in Microsoft Word,) reports and charts (that were saved in Microsoft Word or Excel,) and document scans. (This replaces the costly document scanning feature in other contact management systems. You simply use the scanning software that came with your scanner and save the scanned image. You can then open the image from within the system after you specify which program will open images on the Setup screen.) All files that can be linked must be put into the mailmerge directory set on the Setup screen. Keeping all of the files that can be linked in one directory makes backup much simpler and much more efficient.

URL Link screen- Figure 23:

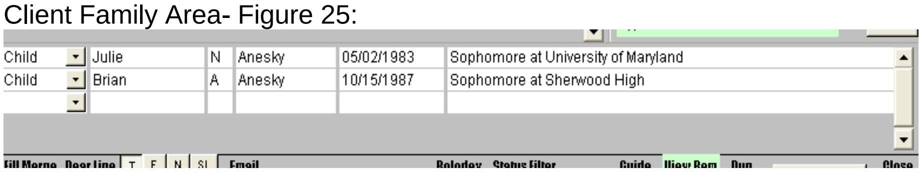


Expanded URL Link screen- Figure 24:



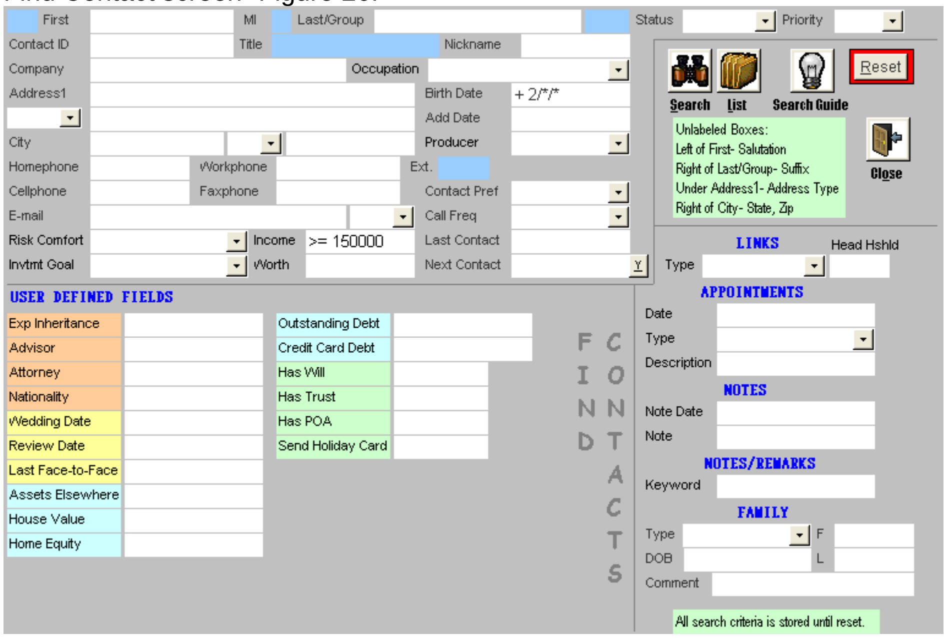
You can open unlimited URL links for each client by setting up the links on the Expanded URL Link screen. URL links can point to contact employer web sites, homepage sites, personal sites, or sites of interest to the contact.

Client Family Area- Figure 25:



You can store and search by limited family member information. To enter family members into the system, click the Family button. The Notes area will be replaced by family information. To add new family members, simply type into the table.

Find Contact screen- Figure 26:



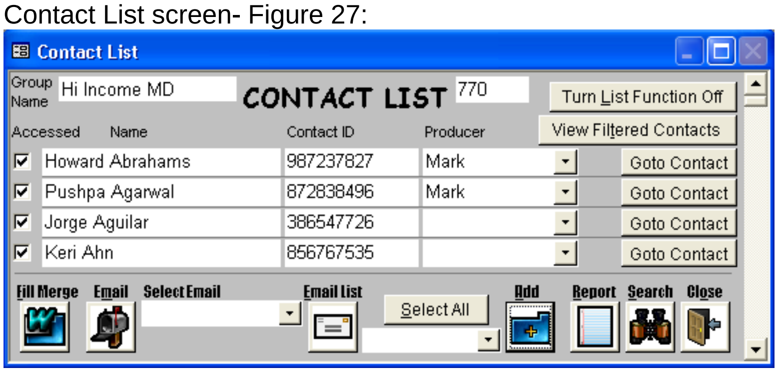
You have the option of searching for contacts in the system via a combination of any of the white boxes on the find contact screen. For example, you can look for contacts who have a birth date in February and have income more than $150,000. The system will search the database for contacts matching the description. If only one contact is found, that contact is displayed on the contact information screen. If more than one contact matches the criteria selected, the contact list (discussed below) screen will come up and you will have the option of choosing which contact's information you want to see, or you can scroll through the filtered contacts on the contact information screen (discussed in the contact list screen section below). The Find Contacts screen is an exact copy of the contact information screen. This is done to give you familiarity with the information layout.

If criteria is entered and you click search, the system remembers all of the search criteria until reset is clicked or the system is restarted. (This is useful if you run a search that is not specific enough and you want to add more criteria.)

Please refer to the search guide for search rules.

Search: creates a filter based on your entries and applies that filter to the database. If only one contact is found, that contact is displayed on the contacts information screen. If more than one contact is found, the contact list screen displays a list of all of the contacts found that match the criteria entered.
List: opens up the contact list screen without applying any filters. All of the contacts in the system are available for you to pick from.
Search Guide: displays the field search rules
Reset: clears all criteria entered on this screen.
Y: automatically fills in the next contact box with “<= (today's date)”
Close: goes back to the contact information screen

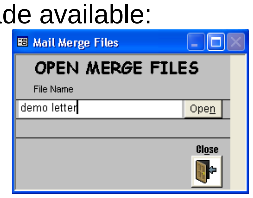
Contact List screen- Figure 27:



The contact list screen will open one of two ways; on the contact information screen, you can click List, or if the criteria entered in the Find Contacts screen finds more than one contact in the database. The system has a list function that allows you to individually select found contacts to use in reports, mail merges, group lists, emails, and labels. To turn on the list function, click the Turn List Function On button on the contact list screen. The list function can only be turned off by clicking the Turn List Function Off button on the contact list screen or by going to the find contacts screen, entering in new search criteria, and choosing to replace the list criteria.

When the list function is off, the following options are available:
View Filtered Contacts: lets you scroll though the contact list on the Contact Information screen (you should click this button again or reset all filters to view all contacts on the contact information screen.)
Goto Contact: opens the contact information screen for the contact to the left of the Goto Contact button
Delete: deletes the recalled contact group
Report: opens the report menu screen
Search: opens the Find Contact screen
Close: goes back to the contact information screen

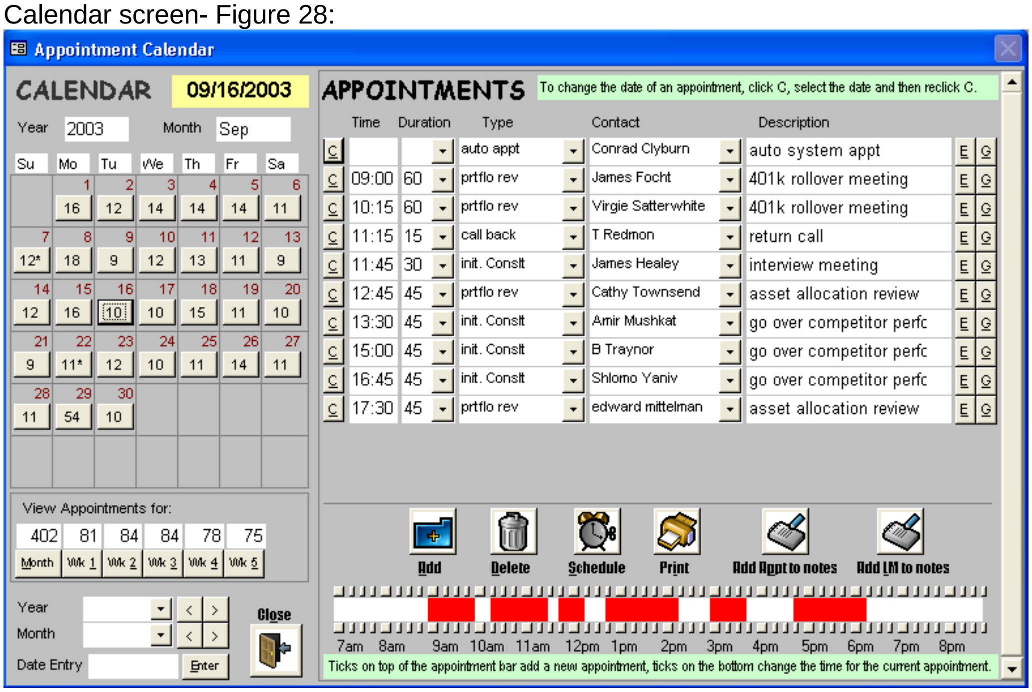
When the list function is turned on, the following options are made available:
Fill Merge: fills the mail merge table with the names/ addresses of the contacts on the contact list. After the table is filled, a list of available mail merge letters appears. You can select any of the letters that will automatically open in Microsoft Word.



E-mail: opens the default e-mail program and prefills the e-mail addresses of the contacts in the contact list and the email subject and body from the email selected. (Emails sent to multiple recipients will automatically use the BCC line for email addresses.)
Email List: exports a text report with email, first name, last name, and date and time for the next appointment for the current contact list. Used with group email program to personalize and send emails. (Please see the Contact Sage Group Email manual for details.)
Select All: selects all of the displayed contacts
Add: stores the selected contacts under the name entered to the left of the Add button (to add a group, turn on the List Function, check the desired contacts, type in a new group name in the box to the left of Add and then click Add)

You can change any of the stored contact group names by changing the group name title at the top left of the screen.

Calendar screen- Figure 28:



The calendar screen graphically displays how many appointments you (or the selected producer) have for each day of the month. The values next to the year and month labels under the calendar title specify which year and month is being shown. The buttons in each of the day boxes reflect a count of the total number of appointments for that day. A star next to the appointment count for any of the days shown means that you have an appointment with the last contact viewed on the contact information screen on that day. By clicking on any of the appointment count buttons on the calendar screen, the appointments for that day will be displayed in the appointments list on the right half of the screen.

drop boxes next to the year and month labels at the bottom left of the screen set the calendar display
arrow buttons next to the entry boxes let you move between the year and month, respectively.
Month: displays all of the appointments for the month chosen on the appointments screen (figure 29)
Week (1..6): displays all of the appointments for the week chosen on the appointments screen (figure 29)
Enter: opens the appointment screen for the date in the date entry box
Close: goes back to the contact information screen

Add: opens the expanded appointment entry screen to add a new appointment. The date for the new appointment will be filled in with the date being shown.
Delete: removes the appointment highlighted (just click on any box in the appointment row you want to delete)
Add Appt to notes: automatically adds an appointment description note to the contact with the appointment (this only works when a contact has been selected in the white box under contact)
Add LM to notes: automatically adds a left message note to the contact with the appointment (this only works when a contact has been selected in the white box under contact)

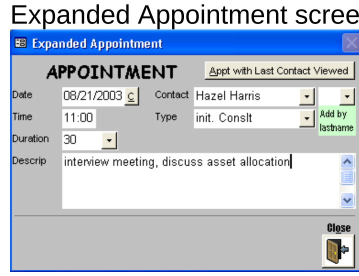
Schedule: prints an hourly appointment schedule for the day shown
Print: opens the appointment report
C: lets you graphically select dates (on the appointment list on the calendar screen, you must click C again after you select a new date from the date selector screen.)
Exp (E): displays the current appointment on the expanded appointment screen
Goto (G): opens the contact information screen for the contact to the left of the button

Daily Ruler/Appointment Bar: the white and red bar visually shows when you have appointments scheduled for the current day. Red means you have already scheduled an appointment during that time.
The ticks above the Appointment Bar let you easily add a new appointment on the expanded appointment screen for the current day at the time clicked.
The ticks below the Appointment Bar let you change the time for an appointment. To change an appointment's time, click on the appointment time box you want to change, and then click a tick below the appointment bar.

When an appointment date, time, or duration are entered or changed, the system performs a check to make sure there are no overlapping appointments. If there are overlapping appointments, you are informed.

Appointments screen- Figure 29:

Expanded Appointment screen- Figure 30:



The appointments screen shows a detailed listing of appointments. The appointments screen can be accessed in two ways. When you click to view a week or the month from the calendar screen, the appointments for that period are displayed on the appointments screen. The other way is for you to click the Appts button on the contact information screen. This brings up all of the appointments in reverse chronological order for the current contact.

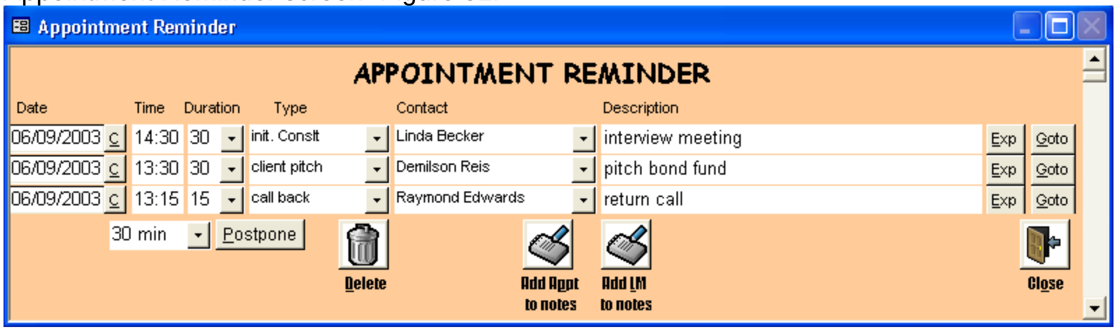
Appt with Last Contact Viewed: fills in the Contact box with the last contact viewed on the contact information screen

Calendar: is only visible if the appointments screen was opened from the calendar screen. If the calendar button is clicked, the calendar screen is opened to the date formally viewed in it

Time must be entered in 24-hour format.

All of the other buttons on the Appointments screen have the same function as the appointment list on the calendar screen.

Appointment Reminder screen- Figure 31:

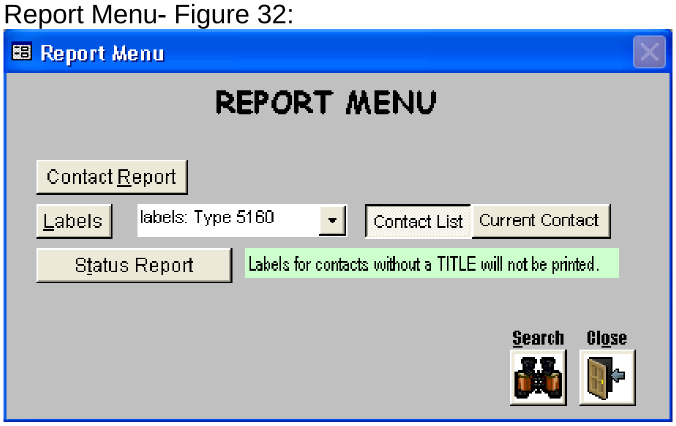


The appointment reminder screen appears before a scheduled appointment. This feature is activated on the Setup screen. Depending on the settings on the Setup screen, the system checks for upcoming appointments on a selectable interval. Appointments are checked by a selectable period in advance. (If the appointment reminder setup is to: Check every 5 minutes with a 30 minute warning cushion, the system will check every 5 minutes for appointments between 30 and 35 minutes from the current time.)

<u>Postpone:</u> adds the time in the box to the left of this button to the current appointment time.
<u>Delete:</u> removes the appointment highlighted
<u>Add Appt to notes:</u> automatically adds an appointment description note to the contact with the appointment (this only works when a contact has been selected in the white box under contact)
<u>Add LM to notes:</u> automatically adds a left message note to the contact with the appointment (this only works when a contact has been selected in the white box under contact)
<u>Close:</u> goes back to the contact information screen with the current contact's information
<u>C:</u> lets you graphically select dates
<u>Exp:</u> displays the current appointment on the expanded appointment screen
<u>Goto:</u> opens the contact information screen for the contact to the left of the button

When an appointment date, time, or duration is entered or changed, the system performs a check to make sure there are no overlapping appointments. If there are overlapping appointments, you are informed.

Report Menu- Figure 32:



The report menu lets you access all of the system reports.

<u>Contact Report:</u> opens the contact report setup screen
Contact list/Current contact selector: selects which contacts appear on the printed labels
<u>Labels:</u> opens the label screen formatted by label type selected
<u>Status Report:</u> opens the status report setup screen

If you will be outputting reports to Microsoft Word, you should install a macro that will automatically format the Word report. The procedure is simple. For instructions, open c:\cisage\sagewordmacro.doc

Contact Report Setup- Figure 33:

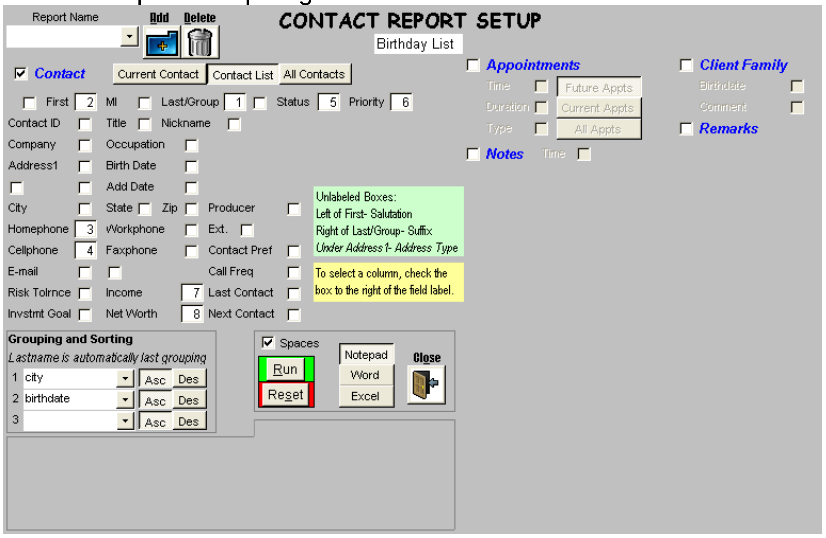
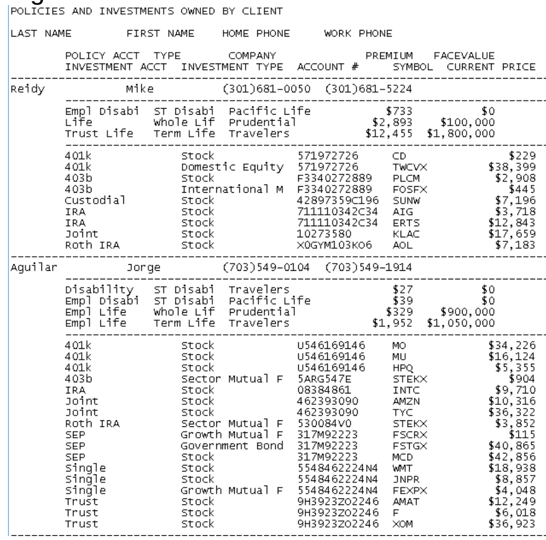


Figure 34:



```
POLICIES AND INVESTMENTS OWNED BY CLIENT

LAST NAME        FIRST NAME    HOME PHONE     WORK PHONE

         POLICY ACCT   TYPE        COMPANY               PREMIUM   FACEVALUE
         INVESTMENT ACCT  INVESTMENT TYPE  ACCOUNT #      SYMBOL  CURRENT PRICE
--------------------------------------------------------------------------------
Reidy            Mike          (301)681-0050  (301)681-5224
         -----------------------------------------------------------------------
         Empl Disabi   ST Disabi   Pacific Life             $733         $0
         Life          Whole Lif   Prudential             $2,893   $100,000
         Trust Life    Term Life   Travelers             $12,455 $1,800,000
         -----------------------------------------------------------------------
         401k              Stock            571972726      CD              $229
         401k              Domestic Equity  571972726      TWCVX        $38,399
         403b              Stock            F3340272889    PLCM          $2,908
         403b              International M  F3340272889    FOSFX           $445
         Custodial         Stock            42897359C196   SUNW          $7,196
         IRA               Stock            711110342C34   AIG           $3,718
         IRA               Stock            711110342C34   ERTS         $12,843
         Joint             Stock            10273580       KLAC         $17,659
         Roth IRA          Stock            X0GYM103K06    AOL           $7,183
--------------------------------------------------------------------------------
Aguilar          Jorge         (703)549-0104  (703)549-1914
         -----------------------------------------------------------------------
         Disability    ST Disabi   Travelers                $27          $0
         Empl Disabi   ST Disabi   Pacific Life             $39          $0
         Empl Life     Whole Lif   Prudential              $329    $900,000
         Empl Life     Term Life   Travelers             $1,952  $1,050,000
         -----------------------------------------------------------------------
         401k              Stock            U546169146     MO           $34,226
         401k              Stock            U546169146     MU           $16,124
         401k              Stock            U546169146     HPQ           $5,355
         403b              Sector Mutual F  5ARG547E       STEKX           $904
         IRA               Stock            08384861       INTC          $9,710
         Joint             Stock            462393090      AMZN         $10,316
         Joint             Stock            462393090      TYC          $36,322
         Roth IRA          Sector Mutual F  530084V0       STEKX         $3,852
         SEP               Growth Mutual F  317M92223      FSCRX           $115
         SEP               Government Bond  317M92223      FSTGX        $40,865
         SEP               Stock            317M92223      MCD          $42,856
         Single            Stock            554846222 4N4  WMT          $18,938
         Single            Stock            554846222 4N4  JNPR          $8,857
         Single            Growth Mutual F  554846222 4N4  FEXPX         $4,048
         Trust             Stock            9H3923Z02246   AMAT         $12,249
         Trust             Stock            9H3923Z02246   F             $6,018
         Trust             Stock            9H3923Z02246   XOM          $36,923
--------------------------------------------------------------------------------
```

The contact report setup screen lets you create a text report that contains contact information with/without appointments, notes, or remarks. You have the ability to save and name report settings and recall those anytime.

The report setup screen is broken down into sections. The contact section lets you pick which contact data will be displayed on the report and the order of the data. Clicking on any of the fields (contact id, city, home phone, etc.) in the contact section causes the checkbox to be replaced by the column order number for that field. The current contact/contact list/all contacts selection next to the contact checkbox selects which contacts will be displayed in the report. Current contact only displays the last contact viewed on the contact information screen. Contact list displays the list checked on the contact list screen after the list function is turned on.

The Grouping and Sorting area in the lower left of the screen lets you sort contact information by three different fields. Last name is always the default last field sorted by. (If you sort by city, the sort applied will be city then last name.)

You can select only one report type (contact/appointments/notes/remarks/family) at a time. The fields in the appointments, and notes sections let you pick which additional data in addition to the core data is displayed in the report. (Core data such as appointment date and appointment description are automatically displayed in the report if the appointments report is chosen.)

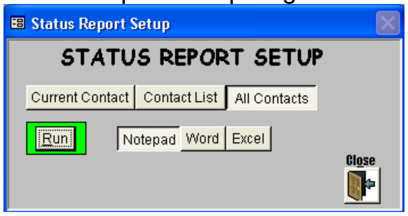
The Future Appts/Current Appts/All Appts choice beside the appointments section lets you choose which appointments are displayed. Future appointments only display appointments scheduled today or in the future. Current appointments only display appointments for the last day selected from the calendar screen.

If appointments, notes, or remarks reports are chosen, you also have the option of selecting whether all contacts are displayed, or only contacts that have the requested information are displayed. (A contact with no appointments will not be displayed if the Only Contacts With Requested Info choice is selected and the appointment report is selected.)

combo box in the top left of the screen lets you recall previously saved reports.
<u>Add:</u> lets you add new reports to the system by resetting the report setup and using the name in the combo box to the left of Add for the new report name. (to add a new report, type in a new report name then click Add)
<u>Delete:</u> lets you delete the current report from the system.
<u>Run:</u> runs the report
<u>Reset</u>: clears all the report choices. This is the only way to reorder the data fields for the contact section.
<u>Close:</u> goes back to the report menu.

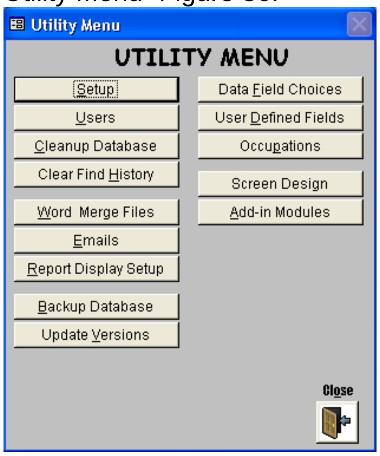
To save a new report, you should click the Add button and type in a new report name in the white box under the title.

Status Report Setup- Figure 35:



The status field for a contact can be used to track the dates that a contact goes through the various stages of the underwriting or client acquisition process. The status tracker is enabled on the setup screen (below).

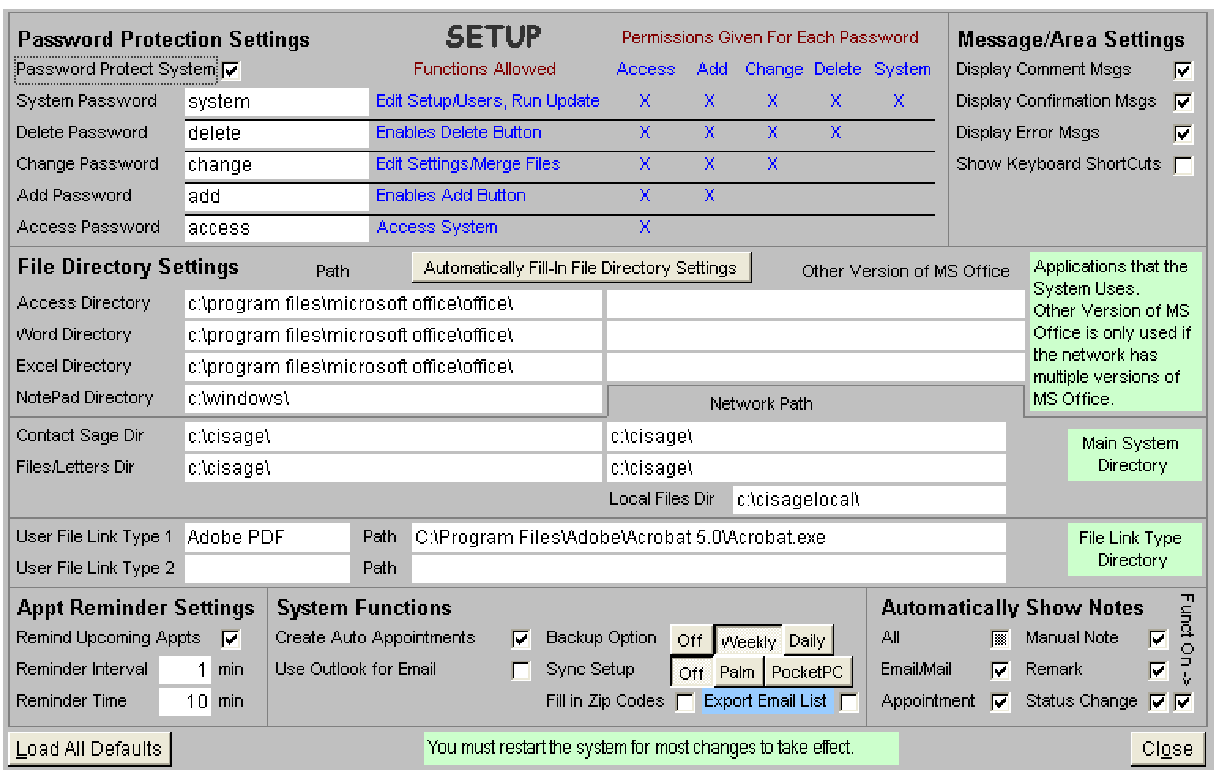
Utility Menu- Figure 36:



Setup: opens the setup screen
Users: opens the user screen
Data Field Choices: opens the Screen Choices screen
User Defined Fields: opens the user defined contact fields setup screen
Update Versions: runs the update version program
Email To Lines: opens the email to line screen
Email Subjects: opens the email subject screen
Email Bodies: opens the email body screen
Report Display Setup: opens the report display setup screen
Cleanup Database: repairs data entry errors
Backup Database: runs the backup program
Word Merge Files: opens the edit merge files screen
Screen Design: opens the data layout screen design
Add-In Modules: opens the Add-In Module screen. For some of the Add-in modules, you must install the appropriate files before those functions will work.

Setup screen (utility)- Figure 37:

The system setup screen in the utilities menu lets the administrator setup password protection for the system, select the directories for applications the system uses, and setup the appointment reminder, system message settings, auto appointment, auto backup, and status note systems.



If the automatic user ID is not used or the user ID is unknown, a user has the option of entering in a generic password on the start screen. Certain functions in the Contact Sage can be password protected. Specifically, access to the system, adding data, changing data, deleting data and accessing the system setup screens, can all be separately granted through multiple passwords. The password on/off option enables and disables the password protection features of the Contact Sage. The row to the right of each functional password explains the functions allowable under each password.

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
Files/Letters	contact files	file links and mail merge letters will not work properly
User File Link	Image Program	not be able to open image file links

If you will be running the Contact Sage 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 dir	network *.doc, *.rtf	network users will not be able to open central form letters or forms
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.

Automatically Fill In File Directory Settings: lets the system look for necessary files and lets you choose from the files found to fill in the directory settings.

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 appointments. The appointment reminder time sets the time period that an appointment reminder box appears before an appointment.

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

The Contact Sage 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.

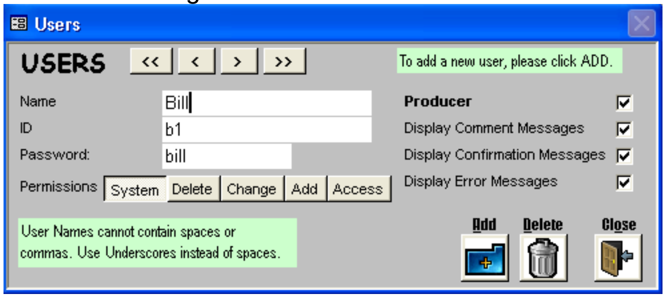
If you will be synchronizing the system with a PDA (Palm or Pocket PC), you must click the appropriate device type for the synchronization to work.

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 system automatically add a status change note to a contact as that contact's status is changed.

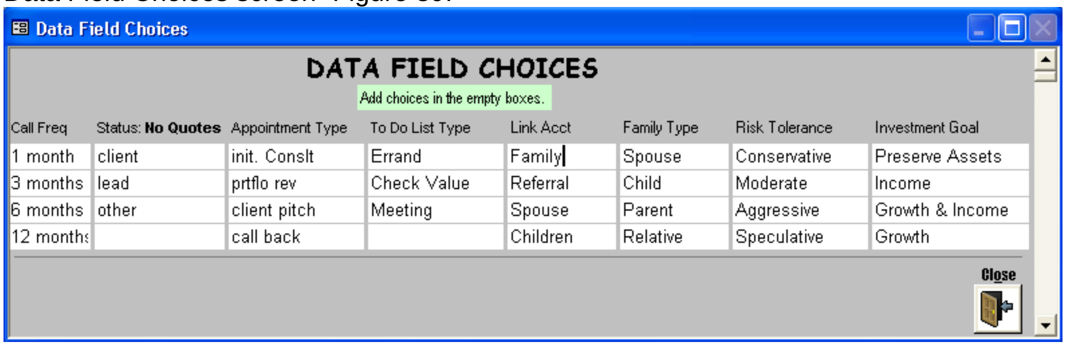
Export Email List- Enables the Group Mail export function. (Please see Contact Sage Group Email manual.)

User screen- Figure 38:

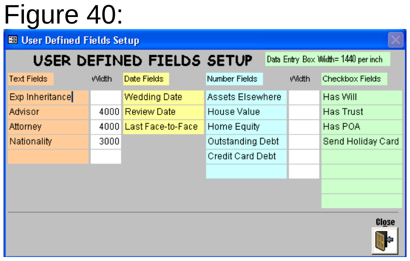


The user ID for any unknown system user will be displayed on the start screen. The system administrator is responsible for adding users to the system. Each user should have a separate personal password. The data entered in the ID box is what the system uses to recognize the user. The name is used to confirm the user's identity. The administrator or first user should give themselves SYSTEM permission.

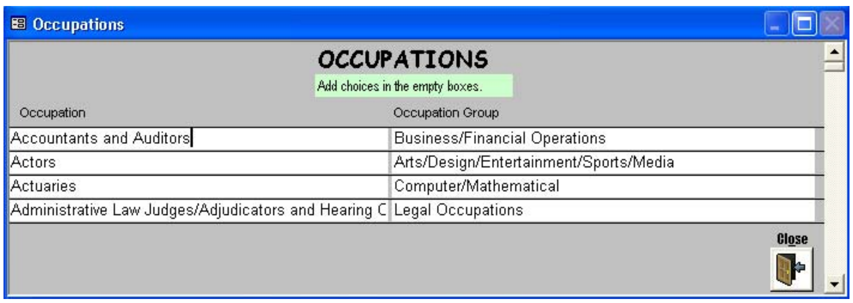
Data Field Choices screen- Figure 39:



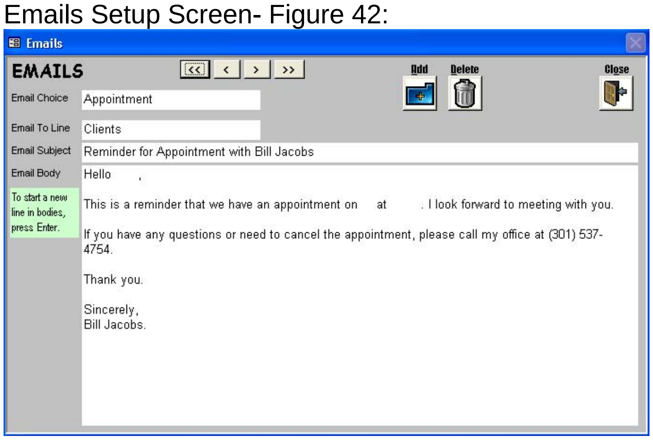
User Defined Field Choices- Figure 40:



Occupations- Figure 41: (from 2000 US Census categorized occupation list)

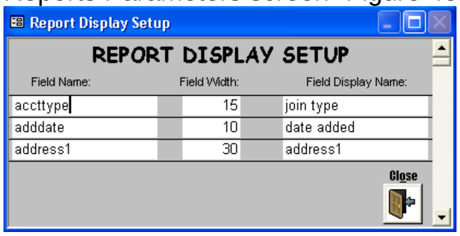


Emails Setup Screen- Figure 42:



You can store unlimited emails in the system.
To move to the next line in the email body box, press enter.

Reports Parameters screen- Figure 43:



The report parameter screen lets you change the field column name and width that appear in the report generator output. The width of each column is determined by the greater of the column width entered or the character count in the column name.

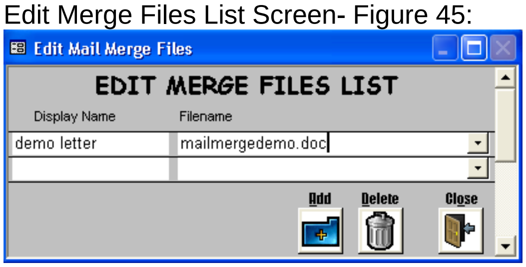
Backup Database- Figure 44:

To use the backup to a disk function, you need to:

1. download and install Winzip 8.0 or newer (http://www.winzip.com/downau81.cgi?winzip81.exe)
2. download and install the Command Line Support Add-On for Winzip (http://www.winzip.com/wzcline.htm)
3. copy the wzzip.exe file from c:\program files\winzip\ to c:\cisage\

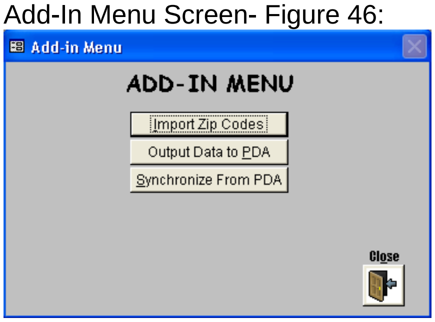
If you plan to use this function, please purchase and register Winzip (currently $29.)

Edit Merge Files List Screen- Figure 45:



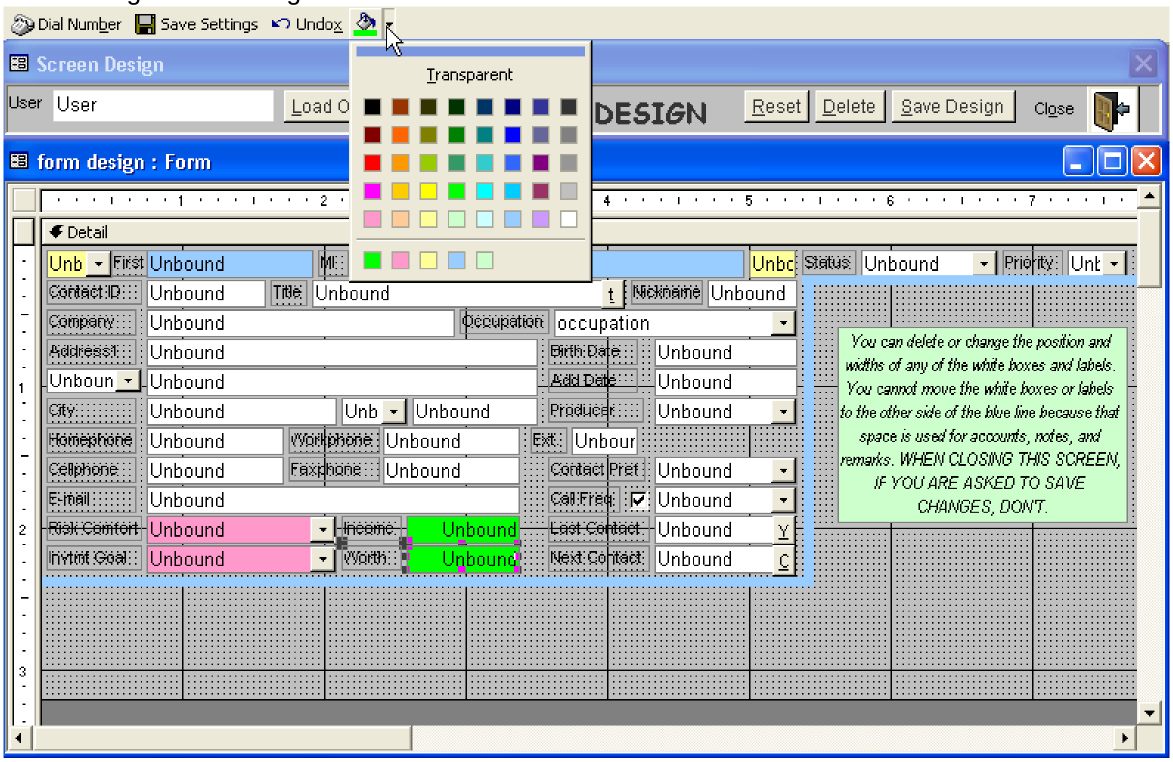
The name of the merge file is displayed on the Open Merge Files screen. The file name of the merge file must be exact and must also include the file extension. (File names cannot contain **SPACES**, we suggest using underscores.) Clicking on the down arrow displays a list of the *.doc files in the mailmerge directory for you to choose from. The sample merge file name is **mailmergedemo.doc**.

Add-In Menu Screen- Figure 46:



[Import Zip Codes:] loads the zip code table to automatically fill in city/state/zip when entering new contacts (optional)
Output Data to PDA: opens the PDA Sync screen (optional)
Synchronize Data from PDA: compares the PDA data to the main system data (optional- please see the Contact Sage PDA Manual)

Form Design Screen- Figure 47:



Each user in the system can customize their own data screen layout. Each user can delete unneeded fields, edit field labels, change the position and width of any field or label, and also change the background color for each text box.

To delete a field or label, simply click on that item and press the delete key. To move any item, click and drag that item to the desired location. To change the width of any item, click on that item, and then drag its borders.

To change the color of any of the text boxes (in white), click on the box and then choose the color by clicking the down arrow to the right of the paint can icon at the top of this screen.

You cannot move any item to the other side of the blue line. Before saving changes, the system will check to make sure that no items are outside the allowed boundaries.

Load Orig Design: If the system asks you to save changes to the form design, you should always click NO. If you do save the changes, you will not be able to reset the design screen to its original design. Click this button to reload the original design screen.
Reset: If you are unsatisfied with the changes you have made you can reset the design screen to its original design.
Delete: If you are happy with the original screen layout, do not save the same layout, as this will slow down the system. This button will remove the current users screen layout from the system.
Save Design: Saves position, width, and color for all screen items. Also runs check to make sure no items are outside allowed boundaries.

Search Guide

You can search on any data stored in the system.
From the Contact Information screen, you can search in any single field.
From the Find Contacts screen, you can search among multiple fields.
All searches return a list of contacts/clients that match the search criteria.

The system uses symbols to specify ranges and values:

Symbol	Meaning	Field types for symbols
,	search for multiple values in a field (value 1 or value 2)	All fields
;	search for range values in a field (value 1 and value 2)	Number, Date fields
*	wildcard before or after search string in field	Text fields, Dates (PLUS search)
>	greater than (value 1 > search string)	Number, Date fields
<	less than (value 1 < search string)	Number, Date fields
=	Equal to (value 1 = search string) (for text fields, omit =)	Number, Date fields
<>	not equal to (value 1 < > search string)	Number, Date, Text fields
>=	greater than or equal to (value 1 >= search string)	Number, Date fields
<=	less than or equal to (value 1 <= search string)	Number, Date fields
+	PLUS Search: use wildcards for dates or add all values for each contact together for numbers	Number, Date fields
Null	empty (<> null - not empty)	Text, Date (use 0 for Number) fields

Examples:

Field	Search String	Meaning
Last name	a,b,c	find all last names beginning with “a” or “b” or “c”
Firstname	steve,mike	Find all first names that are “steve” or “mike”
Birthdate	>= 1/1/1950;<= 12/31/1964	find all birthdates from 1/1/1950 to 12/31/1964
Birthdate	+ 2/*/*	find all birthdates in February
Birthdate	+ 2/*/*;<= 12/31/1960	find all February birthdates in or before 1960
Note	prospect	Find notes starting with “prospect”
Note	*401k	find “401k” anywhere in notes
Phone	null	find all blank phone numbers
Phone	301	Find phone numbers with area code “301”
Balance	>= 1000	Find all single account balances greater than or equal to 1000
Balance	+ >= 1000	Find all combined account balances for each contact greater than or equal to 1000
Commission	> 1000;+ > 5000	Find combined commission greater than 5000 and at least one product commission greater than 1000

All text fields automatically have * after the search string.
You must separate symbols and values with a space.