

# Users' Guide to Contact Management

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## Contact Management: Users' Guide

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## Objectives

This guide covers the basic routine for enabling users to enter Contact Managements data.

An overview of the sections:

**Section One: Getting Started.** This chapter teaches the basics of Contact Management, including learning the function keys, and searching the database for records.

**Section Two: Accounts.** This is where most users will begin working with this book. This section gives step-by-step instructions on how to work with all the functions involving managing the Accounts, Contacts and Notes.

**Section Three: Follow Up Actions.** This chapter gives users instructions on how to best maintain the Diary and make the most use out of it.

**Section Four: Mailing Lists.** This section is meant to make users aware that their data entry can be used to produce mailing labels and useful Address Lists. It also provides information about adding, deleting, copying and printing a mailing list.

**Section Five: Mailing Labels.** This chapter covers the maintenance of mailing label formatting and printing.

# 1 Getting Started

## What You Should Know About the Text

To make the text easier to read, several formatting conventions have been used throughout the step-by-step instructions:

**Table 1 – 1: Types of Text**

<b>Bold</b>	Aside from the headings, and the text highlighted in the displays, <b>bold</b> text is used to describe the use of keyboard keys. Example: Press <b>Enter</b> .
<b>Italics</b>	<i>Italics</i> are used for references to figures and tables. Example: See <i>Table 3-7...</i>
<b>Bold Italics</b>	<b>Bold Italics</b> <i><b>Bold Italics</b></i> are used for anytime the user is meant to key in a stream of text. Whenever bold italics are used, the characters are meant to be keyed as shown, using the same capitals or lower case letters as written in the instruction. Example: Type <b><i>ABC</i></b> ...
<b>Courier Font</b>	Courier New Font is used to describe text found in the displays. This font is used as a substitute for quotation marks because sometimes there can be some confusion as to whether the quotation marks are included as part of the example or not. Example: Processing Print List....

## About Contact Management

### **One Data Base For Everything**

*Contact Management* allows you to organize all of your leads, customers, suppliers and competitors together in one database. The advantages of a single database are many. The data is easy to maintain, find reports and create mailing lists. Also, users in different departments can share information about your clients without needing to use hand written memos or other less efficient means of communication.

**Accounts** The *Company Accounts* are your clients and prospects. The Accounts need to be set up before the other functions will work  
Contact Management: Users' Guide  
2-2 Overview

**Contacts** The *Contacts* are the individuals with whom your staff interact; normally at least one Contact would be set up for every Company Accounts. Your staff has the freedom to add and delete Contacts as needed, and log sales and collection transactions as they are scheduled and completed.

**Notes** The *Notes* are the means by which your staff can share information about the Company Accounts and Contacts. Having accurate Notes on-hand makes your sales staff more knowledgeable about your company's relationship with your clients, and enables all of your staff to take advantage of your company's knowledge resource, thereby adding value to all of your accounts.

**Note Types** The *Note Types* let you keep all of the Notes together and allows you sort them between the Sales Group, Credit and Order Processing departments. Note Types make the Notes easier to find and that can make a big difference during live contact with your clients.

**Diary** The *Diary* gives you a history of actions and follow up items. The Diary items are sorted by Contact Names and your staff names.

**Diary Actions** *Diary Actions* act as reminders for your staff to maintain their relationships with your clients. Follow up calls are made, sales are closed and collections are dealt with promptly.

**Mailing List Data Base** The *Mailing List* is useful for your internal mailing and for keeping track of mailing lists from outside of your organization

**Summary** All of these features combined add value to your organization by speeding up the flow of useful information between your staff. Contact Management empowers your people to increase your marketing optimization and reduce hidden costs through effective communication.

## Searching

**Number Searches:** When searching from a Number search field, such as Address Number, press **Field Exit**, then **Enter** to activate the search. Most of the Number search fields do not allow an **Enter** keystroke from within the field. If the **Enter** key is pressed while the cursor is inside a Number search field, the message, Enter key not allowed in field appears. Press **Reset** to remove the message, then press **Field Exit**, and then **Enter**, to submit the search. Contact Management: Users' Guide Overview 2-3

**Scan Limit Reached:** In searches made through large files, the search range is restricted to avoid system congestion. If the Scan Limit Reached message appears in the bottom left, it means that the search target was not found within the immediate search range, and, the search range did not cover the entire file. Press the **Page Down** key to search the next file portion. If the search target does not exist in the file, the message, No data to display appears.

## Using the Function Buttons and Keys

**Function Buttons:** This is a discussion of some of the function buttons and their uses.

**Table 1-2: Common Function Buttons**  
**Key Function Description**

Enter - OK	Allows you to continue onto the next display.
F3 - Exit	Allows user to exit screen, and sign off at application menu.
F6 - Add	Brings the user to the Add display screen, which allows the user to add new data.
F17 (Shift F5) - Search	Allows the user to Search for Specific data
F21 (Shift F9) - Print List	Allows the user to print an entire Account List or an Account List specified by parameter.
R	Allows you to print a contact report for an individual account.
Z	Adds a new attribute.

Options	Purpose
---------	---------

## Contact Management: Users' Guide

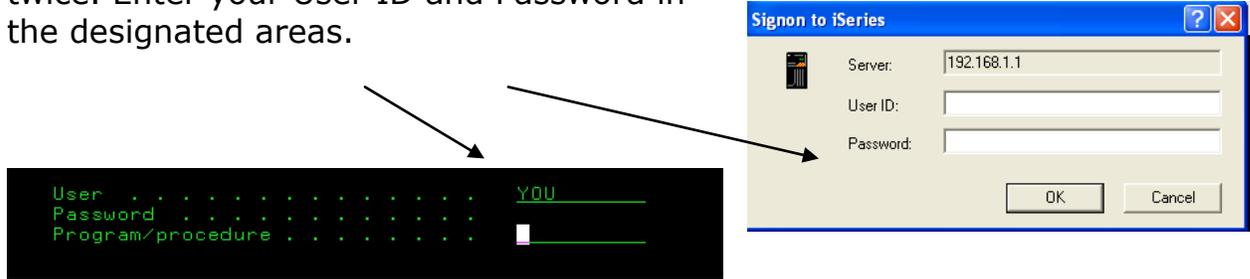
<b>1</b>	<b>Review:</b> allows you to review Account and Contact information
<b>2</b>	<b>Change:</b> brings up the Edit Account display.
<b>4</b>	<b>Delete:</b> lets you delete an Account
<b>5</b>	<b>Display:</b> shows a complete display of information about contact
<b>6</b>	<b>Print:</b> lets you print specified Account
<b>7</b>	<b>Diary:</b> allows you to view the Diary history by Account
<b>8</b>	<b>Contacts:</b> brings up the Work with Contacts display
<b>9</b>	<b>Notes:</b> brings up the Work with Account Notes display

**Table 1 – 3: Important buttons to Contact Management**

# 2 Accounts

## Starting up:

When opening contact management, you will be prompted to sign in in twice. Enter your User ID and Password in the designated areas.



Select *Contact Management* from the list, by inserting a '1' beside it, and press Enter. Next do the same with *CM Accounts*; insert a '1' and press Enter. You will then be directed to the main page of contact management accounts.

Figure 1-1: Signing On

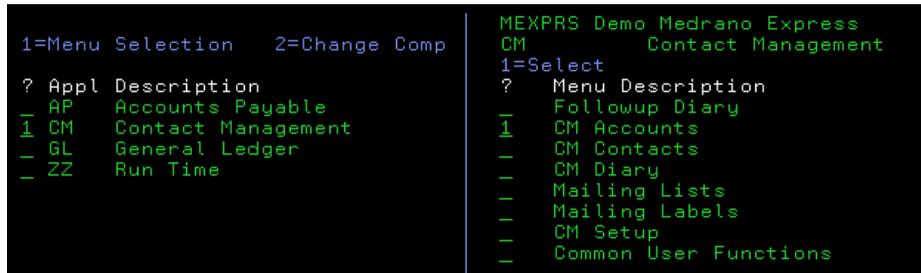
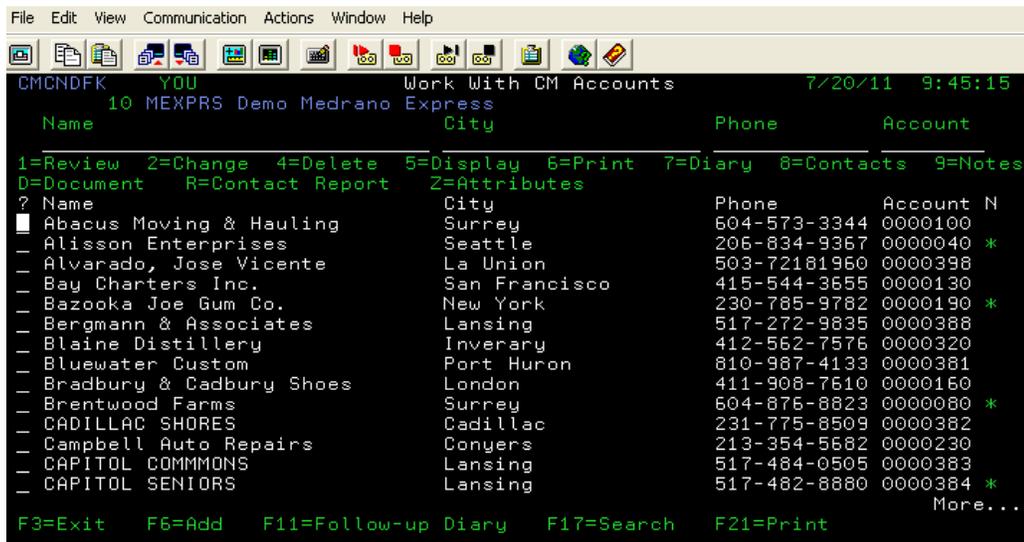


Figure 1-2: Work With CM Accounts Menu



## Contact Management: Users' Guide

Once you've learned the basics of the above keys, and what they mean you can do almost anything with them in contact management, including

- Adding a new account
- Printing account lists
- Reviewing accounts
- Making changes to account details
- Deleting an account
- Displaying account details
- Printing account contact information
- Working with account attributes
- Printing individual account information
- Working with account diaries
- Working with account contacts
- Working with account notes
- Printing account contact information

### Adding a New Account

Company Accounts will be set up for you when the system is installed, however you will need to add new accounts to your Contact Management system as they come in. The following is step-by-step instructions on how to add a new company account:

-Press **F6** while on the main contact management page

-Fill in the required fields (see *figure 1-3* for additional information)

-Press **Enter** twice to finish and confirm

**Figure 1-3: Add Contact**

```
Name          Company
Address 1    11123 3rd Street
Address 2
Address 3
City          Vancouver
Region        BC ...
Country       CAN ...
PC/Zip        V2V 2V2
Phone         604 555 5555
Fax
Source        OTHER ...
Status        ACTIVE ...
Account Rep.  
```

## Contact Management: Users' Guide

**Table 2 – 1: Adding Account fields**

Fields	Description
<b>Source</b>	This field is used to add the source in which the Account was founded. For more Source Codes, click on the prompt box to the right and the Select Account Source panel appears.
<b>Status</b>	This field is used to add the status of the Account. For more Status Codes, click on the prompt box to the right and the Select Account Status panel will appear.
<b>Account Rep.</b>	Someone or a group which is assigned to take care of the account

### Printing a Company Account List

When working with accounts it can be useful to print lists of your company's accounts. Using the Print List function gives you the ability to print account lists by region, country, source, status and report type. The following is step-by-step instructions on how to print an account list.

- Start from the Work with Accounts menu.
  - Click on the Print List button.
- The Prompt for Account List appears.
- Fill in the fields.
  - Click the **Enter** button twice to continue and confirm

### Reviewing Account Details

The review function gives you the ability to look up individual account details. The review account display shows all the information pertaining to the customer's account, which is helpful when contacting a customer.

**Figure 2-1: Reviewing Account Details**

Contact Details →

Functions to choose from →



```

CMB6PVR      YOU      Review Account      7/20/11 11:25:31
Number      388
Name      Bergmann & Associates      Phone 517-272-9835
Addr 1     4095 Legacy Parkway      Fax
Addr 2     Suite 200      Source OTHER
Addr 3
City      Lansing      Status ACTIVE
Country   USA      Region MI
PC/ZIP    48911
Notes

Name      Rick      Chelotti      Title
Phone
Email
Note      No Contact Notes
Action    ...      Action Notes
Follow Up  ...      Follow Up Date      Follow Up Time 0:00:00
Follow up Notes
Last Action      Notes

F2=Edt F3=Exit F8=Nxt F9=Note F10=Attr F11=Contact F13=Doc F17=Diary F21=Print
        
```

**Table 2-2: Work with Accounts Function Keys**

<b>F2 - Edit</b>	Allows you to edit and update the current display
<b>F3- Exit</b>	Allows you to exit the current information
<b>F8 - Next</b>	Shows you the next contact name listed on the account
<b>F9 - Notes</b>	Allows you to work with the account notes
<b>F10 - Attributes</b>	Allows you to work with account attributes.
<b>F11 - Contacts</b>	Allows you to work with the account contact information.
<b>F17 - Diary</b>	Allows you to work with the account diary
<b>F21 - Print</b>	Allows you print a copy of the account you are reviewing

## Copying an Account

The copy function allows you to take an existing account, and then copying it to create a new account. The copy function saves time when creating a new account that has a lot of the same information as an existing account. The following is a step-by-step instructions on how to copy an account.

- Start from the Work With Accounts menu.

**Note:** If the Account you desire is not listed, you can key the name of the account in the Search field and click the **Enter** button.

- Insert a **1** beside the account you want to copy.
- Click on the **F6** button.
- Make changes to the required fields.
- Click on the **Enter** button twice to continue and confirm

## Updating an Account

As account information changes, the data must be updated regularly to keep the information useful. To update an account all you need to do is insert a '2' in the blank beside the account you wish to update, and you will be taken to the edit display screen.

**Figure 2-2: Updating Account**



Name	City	Phone	Account
1=Review 2=Change 4=Delete 5=Display 6=Print 7=Diary 8=Contacts 9=Notes			
D=Document R=Contact Report Z=Attributes			
? Name	City	Phone	Account N
2 Abacus Moving & Hauling	Surrey	604-573-3344	0000100
- Alisson Enterprises	Seattle	206-834-9357	0000040 *
- Alvarado, Jose Vicente	La Union	503-72181960	0000398

## Deleting an Account

When you are no longer dealing with an account, you can remove all the data pertaining to the account. **Note:** All the data for the account will be lost once you have deleted it; therefore, it might be a good idea to print a hard copy of the information.

Simply type a **'4'** in front of the account you wish you delete, and press **Enter** twice to confirm you want this information deleted. If you've made a mistake, be sure to type **"N"** into the confirm box, which will cancel the delete action. Or press **F3** to exit before deleting.

A screenshot of a terminal window showing a confirmation prompt. The text is green on a black background and reads "CONFIRM: Y (Y/N)".

## Printing Individual Account Details

In the previous sections you have been shown how to print your entire Accounts List. However, there are times when you only need to print individual accounts. For these times, type a **6** in the blank next to the individual account you wish you print. On the bottom left of the screen you will see the message "Processing Print List" displayed.

## Working with Account Notes

### Objectives

Account Notes are Notes made by people in your organization about the Company Accounts. These Notes help keep everyone up-to-date on your organization's relationship with the Company Accounts. This Section gives step-by-step instructions in how to maintain the Accounts Notes. After reading this section you will have a better understanding about the following:

- Adding Account Notes
- Edit Account Notes
- Print Account Notes
- Delete Account Notes

### Adding an Account Note:

- Place a **9** in front of the Account you are working with, and then press the **Enter** button.

The Work with Account Notes display appears.

-Press **F6** to add a new account note

The Add Account Notes display appears

- Type in desired notes.

- You need to watch your display as you type the words because you will find some words will start on one line and end on the next. Using your mouse, you can place your cursor on the next line if you run out of room.
- You can use your mouse to go back up and make corrections.
- To erase any mistakes use your mouse to **highlight** the text you want to remove, and then click on the **Delete** button.

- Click the **Enter** button twice to continue and confirm

- Press **F3** to exit.

The New Note is displayed on the Work with Accounts Notes menu.

**Figure 2-3: Adding Account Note**

```
Account          Phone          Fax
A A ELECTRIC LTD-SALES & SVC  808-841-4131  808-842-4134
RODNEY CHUN
500 ALAKAWA ST # 100

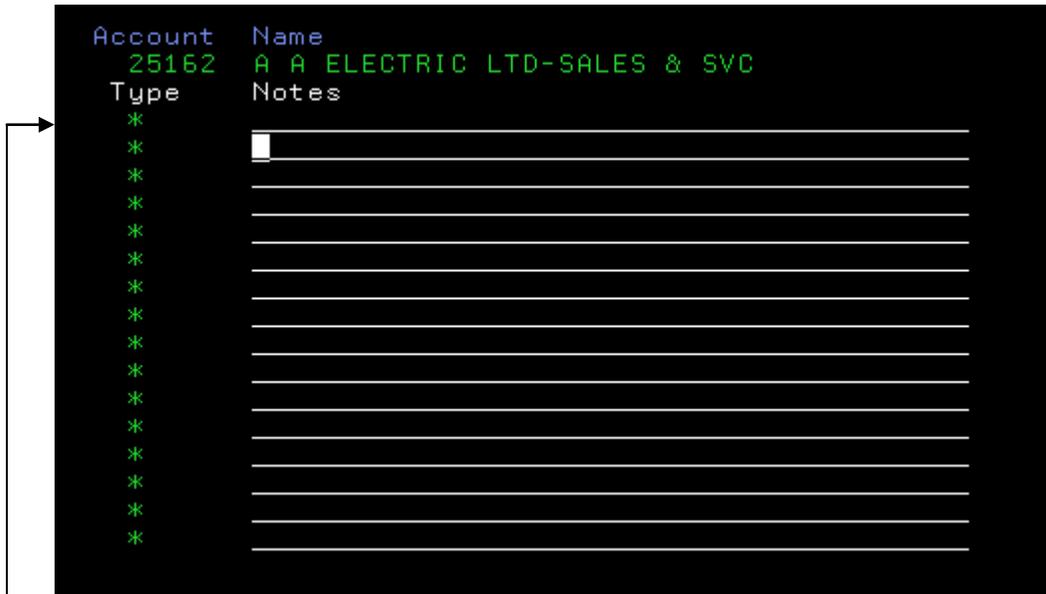
Honolulu        HI  USA 96817-5702

Notes          Type          Date          User
-----
2=Edit      4=Delete      *

F3=Exit  F6=Add  F21=Print List
```

Functions

Figure 2-4: Adding Account Notes Display



Type your notes here

### Printing Account Notes:

- Place a **9** in front of the account you want
- Press **Enter**
- Press **F21** to print.

### Deleting Account Notes:

- Place a **9** in front of the account you want to delete
- Press **Enter** to confirm
- Place a **4** in front of the note you want to delete, then press **Enter**

## Working with Contacts

### Objectives

Account Contacts are the individuals from the Company Accounts who associate with your staff. This Section gives step-by-step instructions in how to maintain the Account Contacts. After reading this section you will have a better understanding about the following:

- Adding a new Contact
- Updating Contact information
- Printing a list of Contacts
- Deleting a Contact

### Adding a Contact

- Place an '8' in front of desired account then press Enter
- Press **F6** to add a new contact
- Fill in the required fields (for further information see *Table 2 - 2*)
- Press **Enter** twice to confirm the information
- Press **F3** to exit this screen

**Figure 2-5: Add Contact to Account**

```

Salutation  █ ...
First Name  John          Initial  _
Last Name   Smith
Title Code  PRINC ...

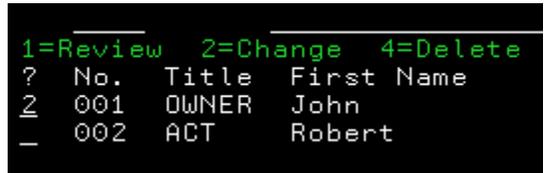
Code  Method          Detail
CELL  Cell Phone     504 555 1123
EMAIL  E Mail
EMAIL2 SECONDARY EMAIL
EXT    Extension
FAX    Fax
HPHONE Home Phone Number
HWFAX  Work-at-home Fax Number
HWORK  Work-at-home Phone Number
MOBILE Mobile phone
PAGER  Pager Number
PHONE  Telephone Number
    
```

**Table 2-3: Working with Contacts' Fields**

Fields	Description
Salutation	Click on the button to the right to bring up the Select Salutation panel. This panel gives you a list of Salutations that are available from the CM Salutation file, and this helps you keep them in a consistent format.
First Name	Key in the first name of the New Contact.
Initial	Key in the middle initial of the New Contact. <b>Note:</b> This field can be ignored.
Last Name	Key in the last name of the New Contact.
Title Code	Click on the prompt box to the right and the Select Title panel will appear. Unlike the Salutation codes, these codes are not commonly known.
Details	Key in the details pertaining to this New Contact. <b>Note:</b> This field can be ignored.

## Updating an Account Contact

- Place an **8** in front of the account you wish to make changes to
- Put a **2** in front of the contact you wish you edit
- Edit and update the fields provided and press **Enter** to save the changes
- Press **F3** to exit the screen



```
1=Review 2=Change 4=Delete
? No. Title First Name
2 001 OWNER John
_ 002 ACT Robert
```

Figure 2-6: Update Account Contact

## Printing an Account Contact List

- Place an **8** in front of the Account you wish to print the Contact list from, and then click on the **Enter** button.
  - Click on the Print List button.
- On the bottom left of the screen you will see the message "Processing Print List" displayed.
- Printing Completed.

On the bottom left of the screen you will see the message "Completed Printing List" displayed.

## Deleting a Contact

- Place an **8** in front of the Account you wish to go to
- Put a **4** in front of the contact you want to delete
- Press **Enter** twice to confirm deleting the contact
- Press **F3** to exit or place an **N** in the space for confirming deleting the contact if you have made an error.

## Working with Contact Notes

### Objectives

Contact Notes are messages written about the Account Company Contacts. Contact Notes are organized into several groups. Some Notes may be written for all of your staff to look at, and others may be private Notes. Depending how the system is set up for your company, private Notes may only be available to their authors or certain departments. This Section gives step-by-step instructions in how to maintain the Account Contact Notes. After reading this section you will have a better understanding about the following:

- Adding Contact Notes
- Printing an Accounts Contact Notes
- Deleting Contact Notes

### Adding Contact Notes

- Place an **8** in front of the desired Account and press **Enter**
- Place a **9** in front of the Contact you want to add a note to.
- Click on the Add button.

The Add Contact Notes display appears

- Type in desired notes.
- You need to watch your display as you type the words because you will find some words will start on one line and end on the next.
- Using your mouse, you can place your cursor on the next line if you run out of room.
- You can use your mouse to go back up and make corrections.
- To erase any mistakes, use your mouse to **highlight** the text you want to remove, and then click on the **Delete** button.
- Press **Enter** twice to continue and confirm
- Press **F3** to exit the screen

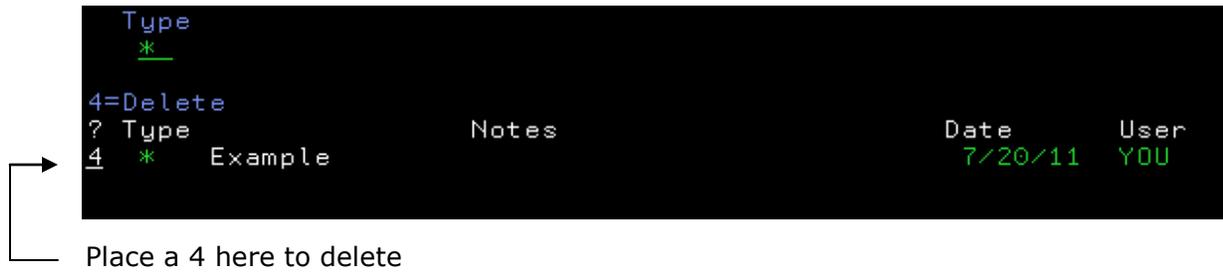
### Printing Contact Notes

- Place an **8** in front of the desired Account
- Place a **9** in front of the Contact you wish to print the notes from, and then press **Enter**
- Press **F21**

### Deleting Contact Notes

- Place an **8** in front of the desired Account and then press **Enter**
- Place a **9** in front of the Contact you wish to delete the notes from, and then press **Enter**
- Place a **4** in front of the notes you want to delete, and then press **Enter**

Figure 2 – 7: Delete Contact Note



```
Type
*
4=Delete
? Type           Notes           Date           User
4 * Example           7/20/11        YOU
```

Place a 4 here to delete

### Printing Account Contact Lists

- Place an **6** in front of the Account you wish to print the Contact list from, and press **Enter**

## Working with Account Attributes

### Objectives

Attributes are another way of keeping track of your company's account information. By using attributes you have the ability to customize your Company Accounts. This Section gives step-by-step instructions in how to maintain account attributes. After reading this section you will have a better understanding about the following:

- Creating new Attributes
- Making changes to Attributes
- Deleting Attributes

### Adding New Account Attributes

- Place a **Z** in front of the account you wish to add an attribute to and then press **Enter**
- Press **F6** to add a new attribute
- Fill in the fields.
- Press **Enter** twice to continue and confirm

Figure 2 – 8: New Account Attribute

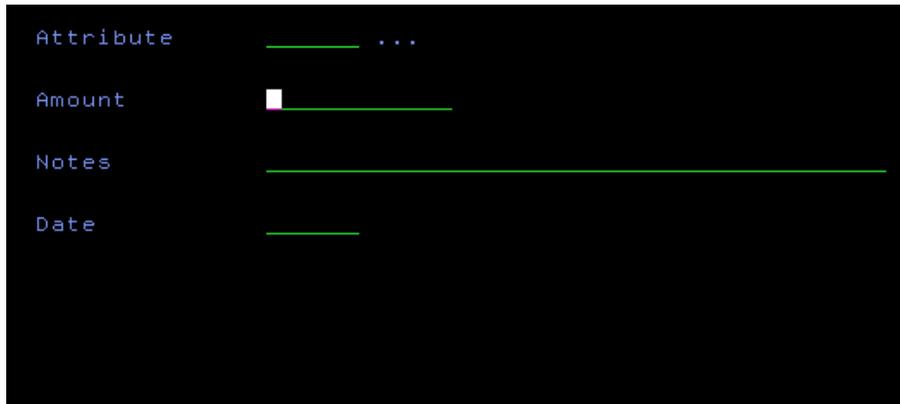


Table 2-4: Account Attributes

Fields	Description
Attribute	Click on the prompt box to the right of the field and the <i>Select Attributes</i> panel appears. You are given a list of attributes to choose from. <b>Note:</b> You are required to complete this field to continue adding a new account attribute.
Amount	Key in the appropriate amount.
Notes	Key in any notes that pertain to the account attribute.
Date	Fill in the date starting with the year, the month and then the day. <b>Note:</b> Only numbers can be keyed in. <b>Note:</b> The date is defaulted at 01-01-01.

## Editing Account Attributes

- Place a **Z** in front of the account that has the attribute you want to edit, and press Enter
- Place a **2** in front an attribute and press **Enter** The Edit Account Attribute display appears. Note: From this display you are only allowed to edit the date.
- Once the changes have been made to the date, Press **Enter** twice to continue then confirm

## Deleting Account Attributes

- Place a **Z** in front of the account that has the attribute you want to delete, and then press **Enter**
- Place a **4** in front an attribute and then press **Enter**  
The Delete Account Attribute display appears.
- Press the **Enter** button twice to continue and confirm  
You are returned to the Work with Attributes menu.
- The message *\*Record Deleted\** should appear in place of the Attribute.

## Printing a Contact Report

In the previous sections you have been shown how to print notes for individual contact within an account. However, there are times when you need to print a complete list of notes for each contact within an account. The following is step-by-step instructions on how to print the data for an individual Account.

- Start from the Work with Accounts menu.

Note: If the Account you desire is not listed, you can key the name of the account in the Search field and click the OK button.

- Place an **R** in front of the account you wish to print a contact report for, and then press **Enter**.

On the bottom left of the screen you will see the message "Processing Print List" displayed.

- Printing completed.

On the bottom left of the screen you will see the message "Completed Printing List" displayed.

- Go to your default printer to gather your print job.

# 3 Follow up Actions

## Objectives

These instructions will help you navigate to the Follow up Actions Menu.

- Open your AS/400 session and sign on.

The User Application Menu appears.

- Insert a **1** beside Contact Management System.

The Contact Management Application menu appears.

- Insert a **1** beside CM Diary



The Work with Follow up Actions menu appears this menu lists all the Diary actions for all the Users.

Use this menu as the main starting point when working with Follow up Diary.

```

ZZQJDFR  YOU
MEXPRS Demo Medrano Express
CM      Contact Management
1=Select
? Menu Description
- Followup Diary
- CM Accounts
- CM Contacts
- CM Diary
- Mailing Lists
- Mailing Labels
- CM Setup
- Common User Functions
    
```

Figure 3 – 1: Main Menu

## Follow up actions:

Figure 3 – 2: Work With Follow Up Actions

```

CMCLDFR  YOU      Work With Follow-up Actions      7/21/11  9:58
Account      Phone      User      Action      Date
-----
1=Follow up  4=Delete  5=Display  7=Reassign  8=Details  9=Notes
? Account      Phone      User      Action      Date
- Mini Movers of London  411-344-6755 TOM      MAIL      3/20/11
_ Mini Movers of London  411-344-6755 TOM      PHONE     3/20/11
    
```

Table 3 – 1: Follow up Action Options

Options	Purpose
1	<b>Followup:</b> brings up Edit Diary Followup Action display, which allows you to update diary actions.
5	<b>Display:</b> allows you to display the Account Diary information.
7	<b>Reassign:</b> allows you to assign the followup action to another user.
8	<b>Details:</b> brings up Work with Contacts. This screen leads to full-screen of displays,
9	<b>Notes:</b> allows you to add notes to your diary actions. For complete instruction on this option go to

## Working with the Follow up Diary

### Objectives

The Follow up Diary is a tool that helps you keep your Contacts up to date. All meetings and phone calls can be logged and follow up calls can be planned for the near future. The Follow up Diary helps you expedite orders and make your collections on time. After reading this section you will have a better understanding about the following:

- Adding a Diary Action
- Following up on a Diary Action
- Reassigning a Diary Action
- Adding Notes to a Diary Action

### Adding a Diary Action

- Start from the Work with Follow up Actions menu.

- Press **F6** to Add

The Select Account display appears.

**Note:** If the Account you desire is not listed, you can key the

name of the account in the Search field and press **Enter**

- Select an Account by inserting a **1** in the space beside it

- Fill in the fields.

- Press **Enter** twice to continue and confirm

Figure 3 - 3

The screenshot shows a terminal-style interface for selecting an account. The fields and their values are as follows:

Name	
Address 1	
Address 2	
Address 3	
City	
Region	MI ...
Country	USA ...
PC/Zip	
Phone	
Fax	
Source	OTHER ...
Status	ACTIVE ...
Account Rep.	

### Reassigning a Diary Action to Another User

-Start from the Work with Follow up Actions menu.

- Place a **7** in front of the Account you want to reassign, and then press

**Enter**

The Reassign Diary Action display appears.

- Fill in the fields.

For a description of the fields see *table 3 - 2*

- Press **Enter** twice to continue and confirm

You are returned to the Work With Follow up Actions menu.

Figure 3 – 4: Diary Follow Up Action Display

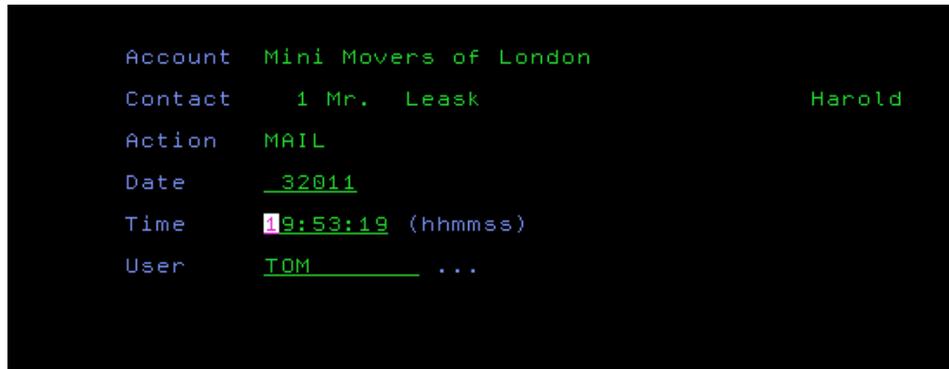


Table 3 – 2: Reassign Diary Actions

Fields	Description
Date	Key in the date you want the new user to be alerted for this action.
Time	Key in the time of day you want the new user to be alerted for this action.
User	Key in the User ID of the user that the diary action is being reassigned to

## Adding Notes to a Diary Action

- Start from the Work with Follow up Actions menu.
- Place a **9** in front of the Account you want to add a note to, and press **Enter**.

- Press **F6** to add

The Add CM Diary Notes display appears:

- Type in desired notes.
  - You need to watch your display as you type the words because you will find some words will start on one line and end on the next.
  - Using your mouse, you can place your cursor on the next line if you run out of room.
- Click the **Enter** button to continue.

The Add CM Diary Notes display is still showing. This allows you to add more notes if needed.

- Type **F3** to Exit

You are returned to the Display CM Diary Notes display. The notes you added are listed here.

Type your notes here →

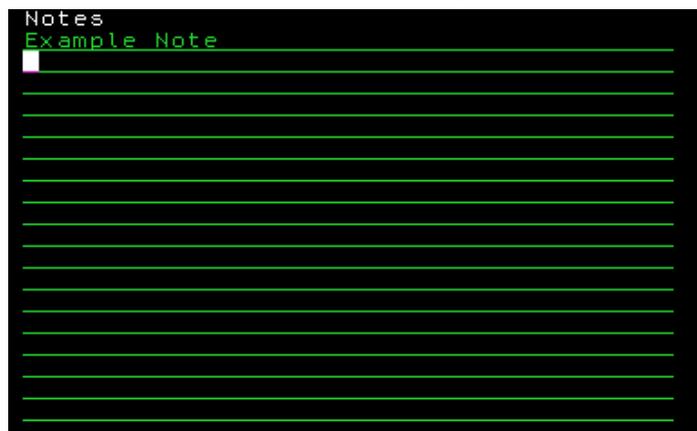


Figure 3 – 5: Add Diary Note

# 4 Mailing Lists Menu

## Objectives

These instructions will help you navigate to the Contact Management Work With Mailing Lists Menu.

## Finding the Work with Mailing Lists Menu

- Open your AS/400 session and sign on.  
This routine can vary between organizations. Ask your system administrator for help if you have trouble signing on. The User Application menu appears.

- Insert a **1** beside Contact Management **Figure 4-1: Mail List Menu**

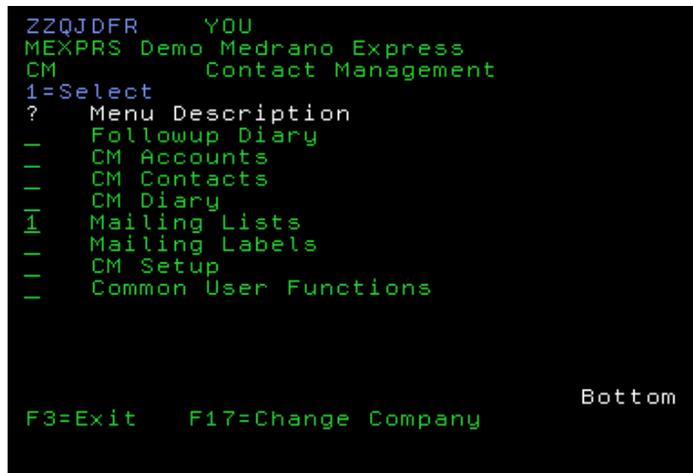
The Contact Management Application menu appears.

- Insert a **1** beside Mailing Lists

the Work with Mailing Lists menu appears.

- Use this menu as the main starting point when working with Mailing Lists.

**Note:** "L" allows you to print mailing labels.



```
ZZQJDFR      YOU
MEXPRS Demo Medrano Express
CM           Contact Management
1=Select
? Menu Description
- Followup Diary
- CM Accounts
- CM Contacts
- CM Diary
1 Mailing Lists
- Mailing Labels
- CM Setup
- Common User Functions

F3=Exit      F17=Change Company      Bottom
```

## Working with Mailing Lists

### Objectives

The Mailing Lists are the means by which mailing labels are produced. You can make up as many types of Mailing Lists as you like, and you may include all of your contact accounts in your lists or only a select few. The mailing lists need a contact name for each account to make sure the mail is delivered to the correct person.

## Adding a Mailing List

- Start from the Work with Mailing Lists menu.  
- **F6** to add

The Add Account Type Key display appears

- Fill in the List field.

Fill in the field with a List Code for the new mailing list.

- Press **Enter** to continue.

- Fill in the other fields.

- Press **Enter** twice to continue and confirm

Figure 4 – 2: Add Mailing List

(See table 4 – 1)

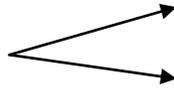


Table 4 – 1: Adding Mailing List

Fields	Description
Description	This field allows you to key in a meaningful description for your new list code.
SIC	This field is available if you have organized your Company Accounts by Standard Industry Code. If you are not using Standard Industry Code, then you can ignore this field.

## Printing a Mailing List

- Start from the `Work With Mailing Lists` menu.
- **F21**
- On the bottom left of the screen you will see the message "Completed Printing List" displayed

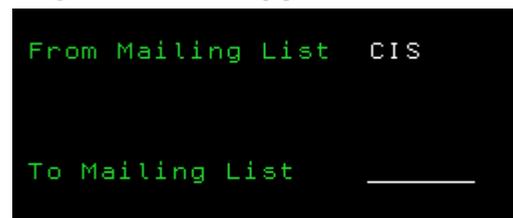
## Making Changes to a Mailing List

- Start from the `Work With Mailing Lists` menu.
- Place a **2** in front of the mailing list you are editing, press **Enter**
- Make changes to the appropriate fields, and then press **Enter** twice to confirm the changes

## Copying a Mailing List

- **Start from the Work With Mailing Lists menu.**
- Place a **3** in front of the mailing list you are copying, and then press **Enter**  
The Copy Mailing List display appears.
- Fill in the To Mailing List field.  
Key in the new name of the mailing list.
- Note:** All the accounts from the first list are copied over to the new list.
- Press the **Enter** key twice to continue and confirm

Figure 4 – 3: Copy Mail List



## Adding an Account to a Mailing List

- Start from the `Work With Mailing Lists` menu.
- Place an **8** in front of the mailing list you are adding the account to, and then press **Enter**

- Next, press **F6** to add

The Select the Account display appears.

**Note:** If the Account you desire is not listed, you can key the name of the account in the Search field and press **Enter**.

**Note:** The system has automatically filled in the Account Number field.

- Next, you will need to fill in the Contact Number field.

**Note:** You are required to fill in the field to continue adding.

- If you do not know the Contact Number, click on the prompt box to the right.

- Choose a Contact by double clicking it.

- Press the **Enter** button twice to continue and confirm

The Account you selected has been added to the mailing list

## Removing an Account From The Mailing List

- Start from the `Work With Mailing Lists` menu.
- Place an **8** in front of the List that you want to remove an Account from, and then click the **Enter** button.

- Place a **4** in front of the Account you want to remove and then press the **Enter** button.

- Press the **Enter** button twice to continue and confirm

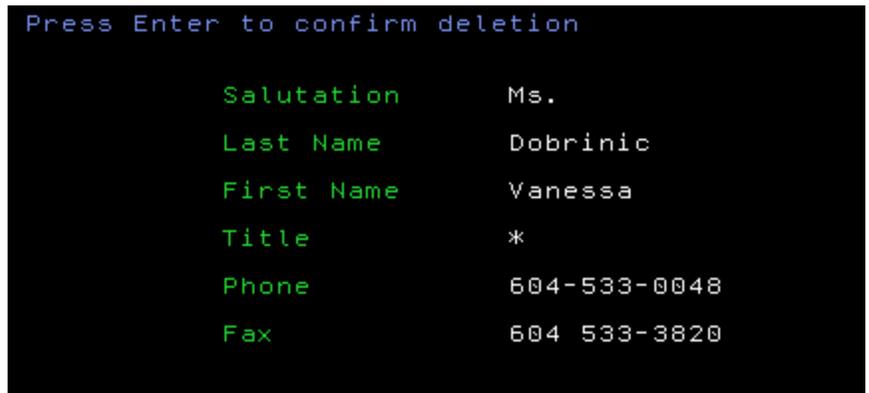


Figure 4-4: Remove Mail List Account

## Printing a Mailing List as a Report

- Start from the `Work With Mailing Lists` menu.
- Place a **6** beside the type of mailing list you want to print a report for, and then press **Enter**

## Deleting a Mailing List

- Start from the `Work With Mailing Lists` menu.
- Place a **4** beside the mailing list you want to delete, then press the **Enter** button

The Delete Mailing List display appears.

- Click the **Enter** button twice to continue and confirm
- You have successfully removes a Mailing List.

# 5 Printing Mailing Labels

## Objectives

This section covers the maintenance of your Mailing Labels. The Mailing Labels let you select a Mailing List to be printed on a specific label format. The label formats can be completely customized. The Mailing Lists are described in Section 5.

### - Open your AS/400 session and sign on.

This routine can vary between organizations. Ask your system administrator for help if you have trouble signing on.

- Insert a **1** beside Contact Management System.
- Insert a **1** beside Select Mailing Labels.
- Fill in the fields.

**Note:** Only the Label Type field is required.

- Click the **Enter** button twice to continue and confirm.

**Label Type** Click on the prompt box to the right of the field. The Select Label panel will appear. This will help you select a Label Format. **Note:** This field is required to continue.

**Figure 5- 1: Make Mailing Label**



Mailing List	LEADS ...
City	Los Angeles
Region	CA ...
Country	USA ...
Source	ACIS ...
Status	LEADS ...
Label Type	MAIL ...

