Pasting Information into Word or Outlook

Once ContactEase is set up on your computer, you can paste information from ContactEase into Word, Outlook or any other Windows program. To do this, use the hotkey combination of Ctrl-Alt-P. Or, if it is available, click on the "Metz" icon on your button bar. After a brief pause (do not press any keys during this time) the paste box appears, with the main program screen behind it:

- If necessary, click on the down arrow to the right of the "Layout" box. Select the layout for the information you wish to paste. Metz will display the most recent layout you used.
- Click on the main program screen behind the paste box. Find the desired address the same way you normally would.
- Select the information you want and double-click on it (or click on the "Paste" button). After a brief pause, the information appears at the cursor location of your WordPerfect document in the format you selected. To select multiple items, hold down the Ctrl key and click on each item.

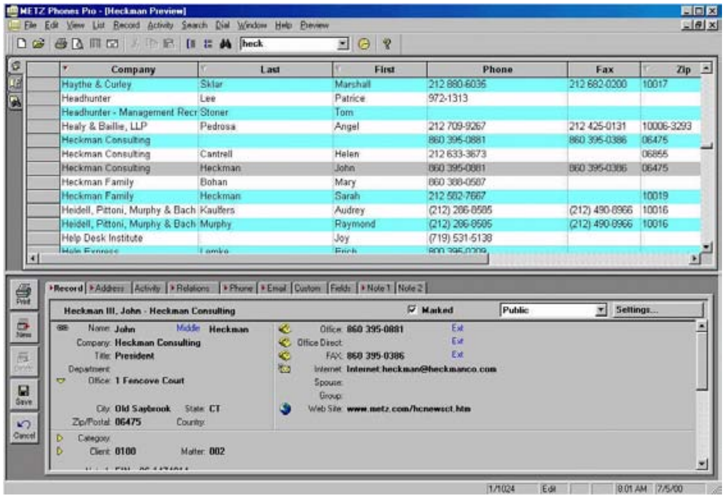
Note: If you need assistance in customizing paste layouts, contact the ContactEase Administrator.

Controlling Access to Your Personal Database

Contact the ContactEase Administrator if you wish to grant other people access to your personal database on a controlled basis.

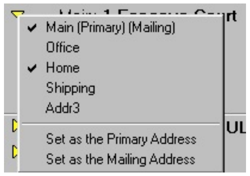
ContactEase—Basic Instructions

Understanding the ContactEase Screen



The top half of the screen lists records in a spreadsheet-like layout; the bottom half shows more information about a particular record.

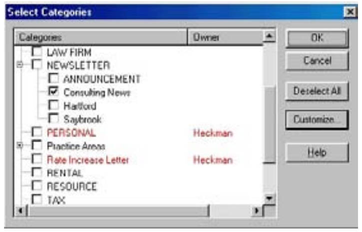
- On the bottom half of the screen, click on the desired tab to select a topic (such as "Phone"). Tabs showing a small red triangle contain information; if there is no triangle, there is no information for that topic.
- A yellow triangle to the left of an entry indicates there is additional information for that item. Click on the triangle to see other listings (see graphic, right).



- On the top half of the screen, you can sort by any column with a triangle next to the column title. A red triangle in the column title indicates the current sort order.
- Size the different areas of the screen by clicking on the border separating columns (cursor turns to a double-headed arrow) and dragging left or right to resize the column.
- There are a number of additional ways to customize your screen display and other options. See "Customizing ContactEase."
- The bar at the bottom lists the number of records selected and the total number in your database (*e.g.*, 1/646) and the time and date.

Entering New Data

To enter a new name and address, click on the "New" icon above or to the left of the address (depending on the screen display). Then type in the information. The name of the field is displayed in blue until you enter data. [Tab] from field to field or click in the desired field to enter information. You can enter information from either the Record or Address tab, but some information (Prefixes, Suffixes, Salutation) must be entered from the Address tab. To get from one data entry screen to the next, [Ctrl][Tab] or click on the desired tab.



Click on the yellow "Categories" triangle to bring up a list of categories. Select one or more (expanding or contracting them as needed).

To create a new category click "customize" then the appropriate button (Add, Sub, Change, etc.). To make a category private (only you see it), click "Private". Private categories are displayed in red.

When you have finished entering information, click on "Save" or, if you wish to add another record, "New." Clicking on "New" saves the current entry and opens a new data entry screen.

If you have a number of individuals who work for the same company, you can link entries to a master address for that company.

- While in the Address data entry screen, click on the chain-link icon next to "name"
- From the pop-up menu, select the record to serve as the master address for this company.
- In the future, when you update the master address, the linked record information will update as well.

If you need to duplicate the information in a record, with the cursor on the desired entry, select Record | Duplicate. This duplicates the selected entry except for the person's name (but including phone numbers and other information). This is a quick way to add a new individual at a company for which a record already exists.

Customizing Record Views

Contact your system administrator if you wish to change what information is displayed in the Record View (*e.g.*, Mr./Ms., specific field information).

Customizing ContactEase

- To display information either horizontally above the rolodex card or vertically to the left of it, select Window, then either Split Horizontally or Split Vertically.
- Click on the border between columns and drag left or right to resize. To select which columns to display, right-click in the column display and select "Columns." Select the fields you wish to display and click "Add." Fields in the right panel of the screen will be displayed. Move fields "Up" or "Down" to change the left-right order they are displayed in.
- Click on View | Toolbars to customize the icons on the button bar.
- Other options can be selected from File | Preferences | General.
  - We recommend *not* selecting "Allow Resizing Record Fields" as it can cause display issues if fields are resized accidentally.
  - Under the "Appearance" tab you can select a color to use in alternating rows of the display for greater legibility.

"Shadowing" Records

You may wish to "shadow" records from the main firm database to your personal database. In that way, you can maintain both central firm records and your own personal rolodex.

To shadow records from a database, first open that database and select the records you wish to place copies of in your local database.

Select File | Synchronize | Settings (click Next). Select "Shadow records from a corporate database." Select your own database to shadow records into (click Next). Select when you want the records shadowed: the most logical time is when you open the database. If you will not always be connected to the network, you may wish to shadow manually when you have time.

Marking Records as Public or Private

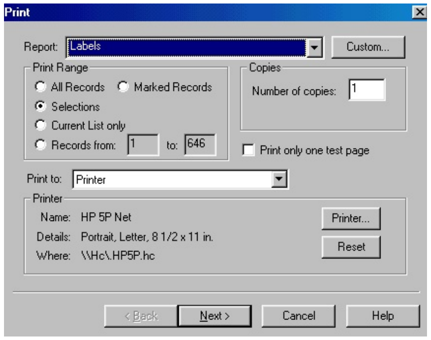
You can choose who gets to see a specific record by selecting one of three settings:

- **Public**. This lets everyone who has access to the database see the record.
- **Private.** Only you can see these records.
- **Semi-Private.** You can select who, among people with access to

Printing

To print labels proceed as follows:

- Select the entry or entries you wish to print. Click on the Label icon at the top of the screen. The following screen appears:

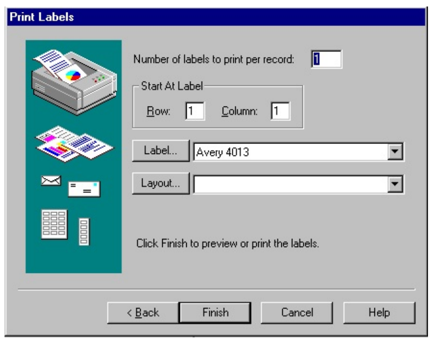


Make selections as desired.

- You can print labels or a variety of Day-Timer or other formats, or create custom reports.
- Print all records or just those you have selected.
- Click “Next” to continue.

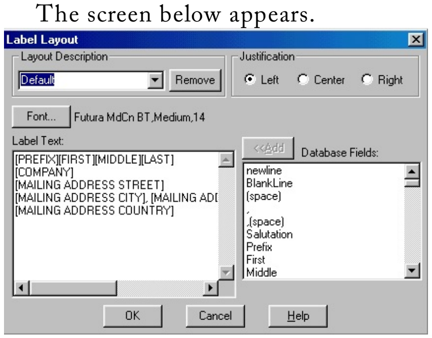
The screen below appears:

- Select the type of labels you wish to print on by clicking on the down arrow and scrolling through the list. It helps if you know Avery number.
- Select the Row & Column where the labels should start. You will will have fewer paper jams if you print the bottom of a sheet first when printing only a few labels.
- If the default layout is acceptable, click “Finish” to print the labels.



- Otherwise, click “Layout” to change layout and font if desired.

The screen below appears.



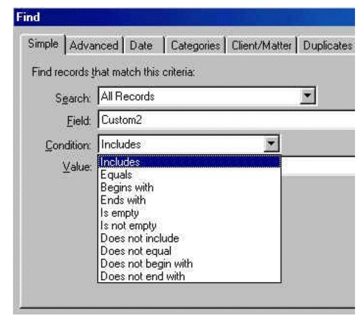
- Select the desired layout. If you need assistance in customizing a layout, contact the help desk.
- Click “Font” select a specific font.
- Click OK to return to the previous screen. See above.
- Click “Finish” to print.

The screens for printing envelopes are similar.

Searching for Information

You can locate a particular person, company, or other information in a number of ways:

- Click anywhere on the displayed rows of names and begin typing the name of the person or company you wish to locate (if you are not already in the Record tab, click twice). By default, a search now searches both for Company Names and Last Names. You may also type in the beginning of a name in the drop-down quick find box at the top of the screen. Clicking on the down arrow brings up a list of items recently searched for.
- Specific searches are available from the Edit menu, including searching for Phone Numbers, doing a Find and Replace (to change a category or company address, for example) or batch assigning new Categories.
- There are several other ways to search for information. To find any information, click on the binoculars ( ) or select Edit | Find:



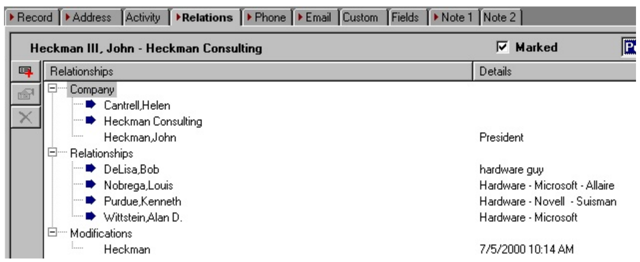
- Click the tab for the type of search you wish to make: Simple, Advanced, by Date, by Category, by Client/Matter or to find Duplicates. Make the appropriate selections as desired. You can also search in Metz for Palm Pilot categories.
- When you find duplicates, you can merge them by selecting the duplicates and hitting F2 or Edit | Merge Records.
- You can construct searches by a large number of criteria: begins with, ends with, includes, is empty, contains, does not contain, etc.
- The Advanced tab allows you to construct Boolean searches by building a string of simple searches. Searches can be saved for later use. The Date tab allows you to find records that have been modified within a given period of time.

Customer Relationship Management

The CRM version of ContactEase provides powerful new features: Relationship Management and Activity Tracking.

Relationship Management

The relationship management feature allows you to define relationships between Person A and Person B. This can serve as a reminder of a chain of relationships: the saying that nobody is ever more than 2 people away from somebody you know has a large degree of truth to it. The relationship screen looks like this:



If you click on a particular relationship, you go to the entry for that person. The relationship shows you other people at the company of the contact in question who may in turn indicate further relationships.

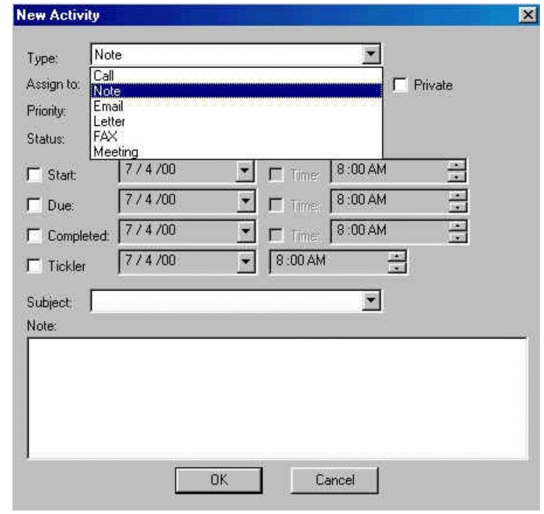
The relationship screen also shows you the last person who modified the particular record and the date it was modified.

To create a new relationship double-click anywhere in the window or click the icon with the "+" on it to the left of the screen:

Click the "Link" button to find the related person, then define the nature of the link in both directions. If you fill in only the first entry (*e.g.*, "spouse") the same relationship is duplicated in both directions.

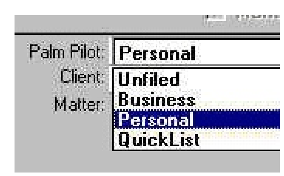
Activity Tracking

ContactEase now allows you to track a variety of activities. To see a list of all activities relating to a person, click the "Activities" tab. When you double click in the Activity screen you can Log a Call, Schedule a Call, Make a Note or start a New Activity. The New Activity screen looks like this:



You can select the type of activity, then mark it Private or Assign it to another person with access to the database. You can set Priorities and Start and End dates (and times). You can also set a "Tickler" to pop up (as long as Metz is running) and remind you of appointments or other items. If you set a "tickler" and assign it to another person, it will pop up on their screen (if Metz is open).

Palm Pilot



You can now synchronize your PalmPilot categories with ContactEase. Once you synchronize with your Palm, its categories are brought over into Metz and appear on the Address screen (see graphic, right).

Marking Records

You can also Mark certain records. You can then view only the marked records, or synchronize only marked records with the Palm Pilot.