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MESSAGING, COLLABORATION AND CRM SPECIALISTS

MX-Contact

Base System Tutorial

The complete Customer Relationship,

Contact Management

and

Sales Automation System

for

Microsoft Outlook

Table of Contents

1 The MX-Contact Tutorial - Introduction

The **MX-Contact Tutorial** is designed to assist you to get up and running with MX-Contact. Step by Step procedures in each lesson along with screenshots will help you to get to grips with the basics of MX-Contact in no time.

Before you start, make sure that MX-Contact is installed on your machine and that you can find the folders that you will be working with. You can navigate to these folders by using the MX-Contact group on the Outlook bar or by using the folder structure.

In this scenario you are a sales consultant employed by a fictitious company National Computer Suppliers, Inc, which sells hardware (servers, workstations, printers, etc.) and software products to major corporate accounts in the United States Pacific Northwest. (Note that in the examples and screenshots shown, you are identified as **Susan Jones**). Although this might be quite different from your environment even to the extent that you sell services rather than products, the exercises here should still give you a good idea about the functionality of MX-Contact in terms of working with companies, contacts, etc. You will be given the task of adding a prospect account and some supplier and competitor companies along with some contacts that relate to these companies. In addition you will record some basic interactions that you have with these parties.

In these sample exercises you are dealing with a customer called **Premier Foods**, along with **Barney Anderson** and **Gillian Meyer**, who are decision makers there, and **Jim Bothwell**, who has been called in as an external consultant to evaluate some products. **Unlimited Technologies** is their current hardware supplier and one of your competitors in the market place. One of your suppliers is **Compaq Corporation**, where **Johnny Walker** is employed as the Account Manager to assist you with large account sales.

In this tutorial you will learn how to do the following:

1. **Create** and **maintain** your database of companies and contacts

   Tutorial Exercises - Database

2. Record details of your interactions with these companies and contacts

   Tutorial Exercises - Interactions

3. **Running reports** to extract listings and information from your database

   Tutorial Exercises - Reports

4. Perform **direct marketing/mail-merge** operations with selected sub-sets of your target database.

   Tutorial Exercises - Direct Marketing

Please note the **exercises are designed to be done in sequence**, as exercises in the later sections depend on data that is added earlier in the tutorial. Also, note that the e-mail exercises you have set Outlook's **Mail Format** (under **Tools, Options**) to **Rich Text**, and **NOT** using Microsoft Word as your E-Mail Editor).

2 Tutorial Exercises - Database

In this section you will do the following exercises:

1. Add a Company

   Adding a Company : Exercise

2. **Add a Second Company**

   Adding a Second Company : Exercise

3. **Add an Individual Contact**

   Adding an Individual Contact : Exercise

4. **Add a Contact with Company Information**

   Adding a Contact with Company Information : Exercise

5. **Add a Company from a Contact**

   Adding a Company from a Contact : Exercise

6. **Add a Contact from a Company**

   Adding a Contact from a Company : Exercise

7. **Associate a Company to a Contact**

   Associating a Company to a Contact : Exercise

8. **Link a Company to a Contact**

   Linking a Company to a Contact : Exercise

9. **Associate a Contact to another Contact**

   Associating a Contact to another Contact : Exercise

10. **Associate a Company to another Company**

    Associating a Company to another Company : Exercise

Once you have done these exercises you are ready to learn about r**ecording interactions** with these companies and contacts

2.1 Adding a Company : Exercise

Add the company **Compaq Corporation (Seattle).**

Complete the following information on the **General** tab:

Company Name:	**Compaq Corporation (Seattle)**
Address:	**722 da Vinci Boulevard, Kirkland, WA, 98034, United States of America**
Telephone:	**+1 (206) 555-8257**
Fax:	**+1 (206) 555-5174**
Web site URL:	**www.compaq.com.usa**

Complete the following information on the **Profile** tab:

Industry:	**IT**
Company Type:	**Supplier**

Show me the **Solution** (Adding a Company : Solution)

2.2 Adding a Company : Solution

Add the company **Compaq Corporation (Seattle).**

Complete the following information on the **General** tab:

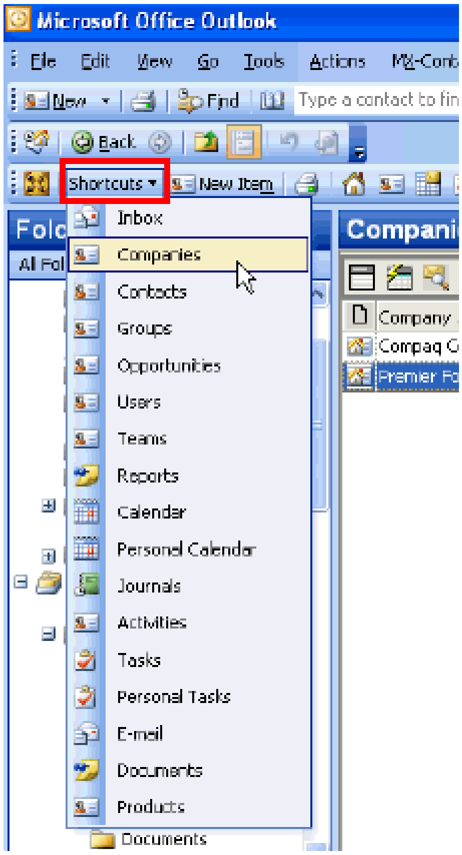
Company Name:	**Compaq Corporation (Seattle)**
Address:	**722 da Vinci Boulevard, Kirkland, WA, 98034, United States of America**
Telephone:	**+1 (206) 555-8257**
Fax:	**+1 (206) 555-5174**
Web site URL:	**www.compaq.com.usa**

Complete the following information on the **Profile** tab:

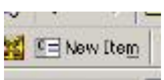
Industry:	**IT**
Company Type:	**Supplier**

Basic Steps:

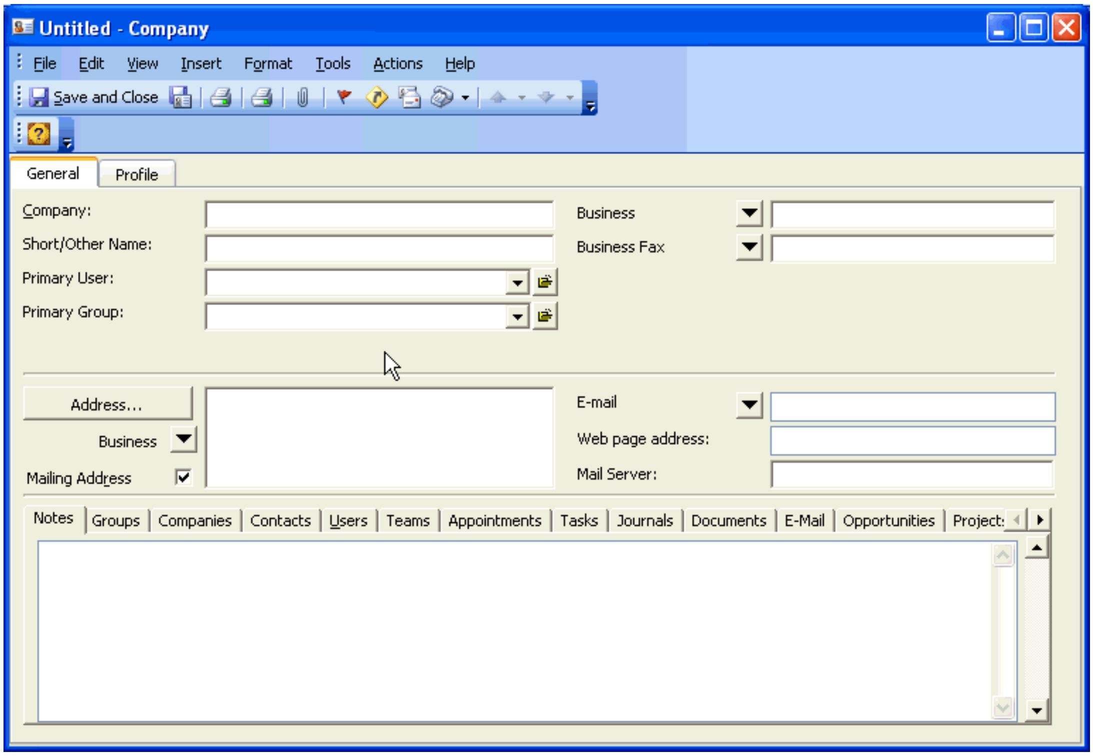
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



2. Click on the **New Item** (Company) button the **MX-Contact** Toolbar.



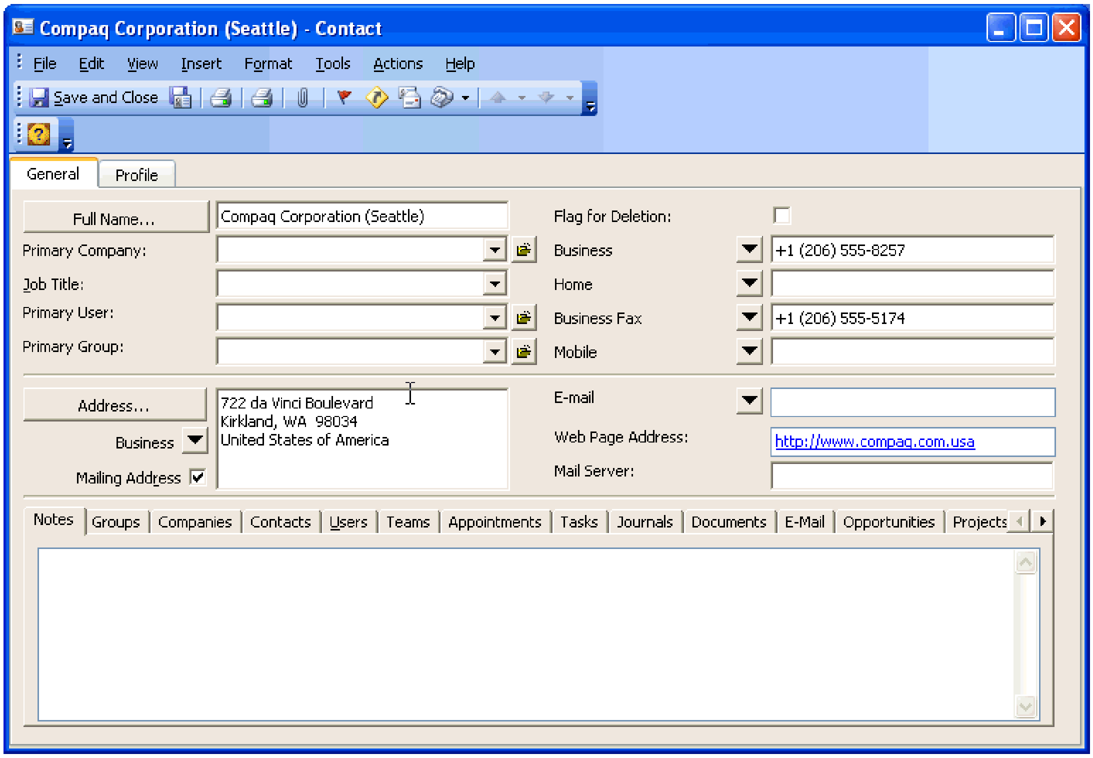
3. A blank **Company** Form will open:



4. In the New Company form, add the details for the company **Compaq Corporation (Seattle):**

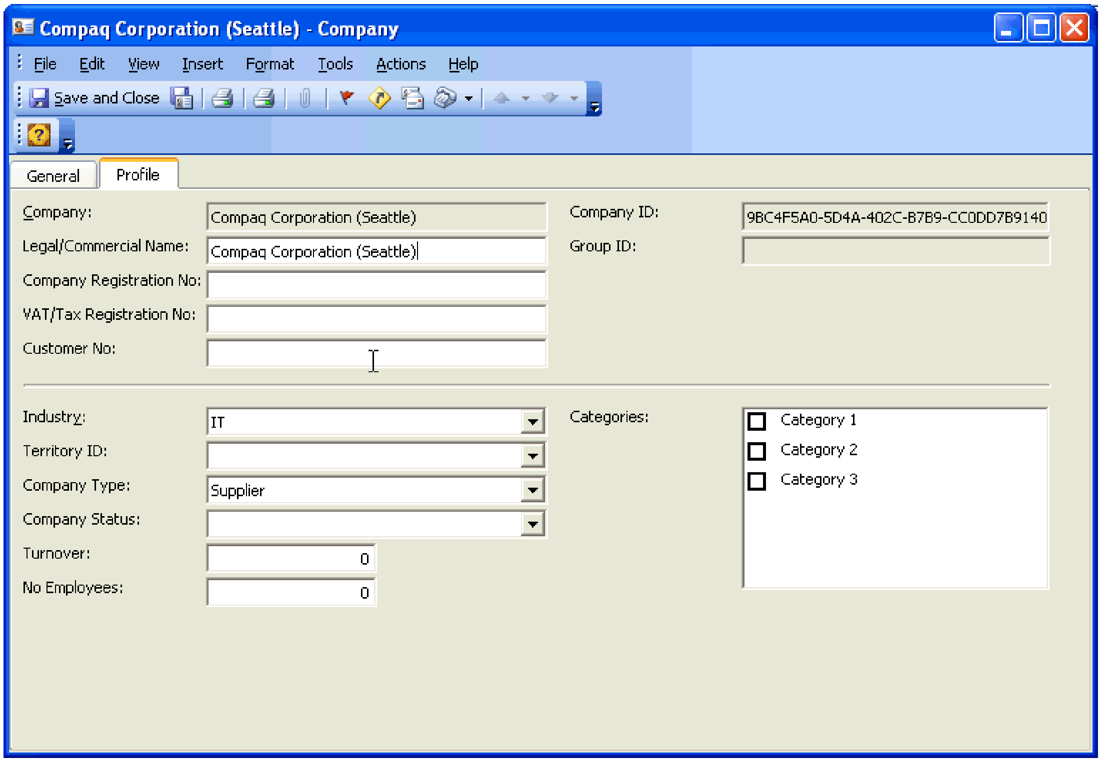
Complete the following information on the General Tab:

Company Name:	**Compaq Corporation (Seattle)**
Address:	**722 da Vinci Boulevard, Kirkland, WA, 98034**
Telephone:	**+1 (206) 555-8257**
Fax:	**+1 (206) 555-5174**
Web site URL:	**www.compaq.com.usa**



5. Enter the details for the Profile Tab:

Industry:	**IT**
Company Type:	**Supplier**



6. Click Save and Close.

Take me to the next **Exercise** (Adding a Second Company : Exercise)

2.3 Adding a Second Company : Exercise

Add the company **Unlimited Technologies, Inc.**

Complete the following information on the **General** tab:

Company Name:	**Unlimited Technologies, Inc.**
Web site URL:	**www.unlimitedtech.com.usa**

Complete the following information on the **Profile** tab:

Industry:	**IT**
Company Type:	**Competitor**

Show me the **Solution** (Adding a Second Company : Solution)

2.4 Adding a Second Company : Solution

Add the company **Unlimited Technologies, Inc.**

Complete the following information on the **General** tab:

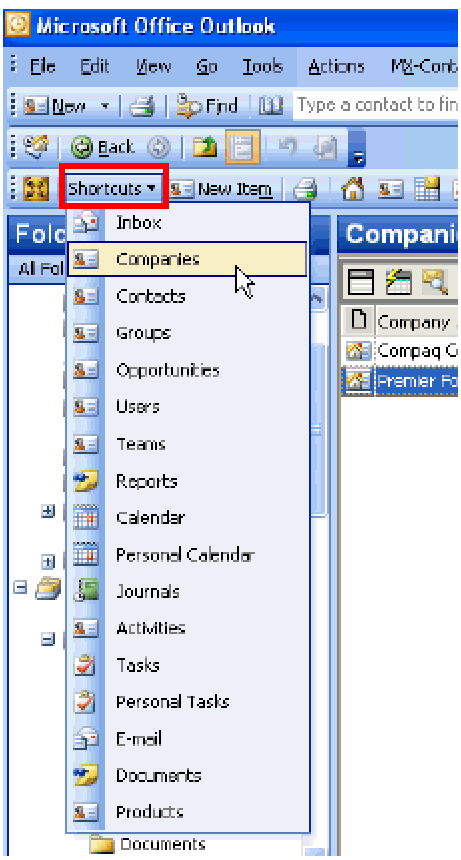
Company Name:	**Unlimited Technologies, Inc.**
Web site URL:	**www.unlimitedtech.com.usa**

Complete the following information on the **Profile** tab:

Industry:	**IT**
Company Type:	**Competitor**

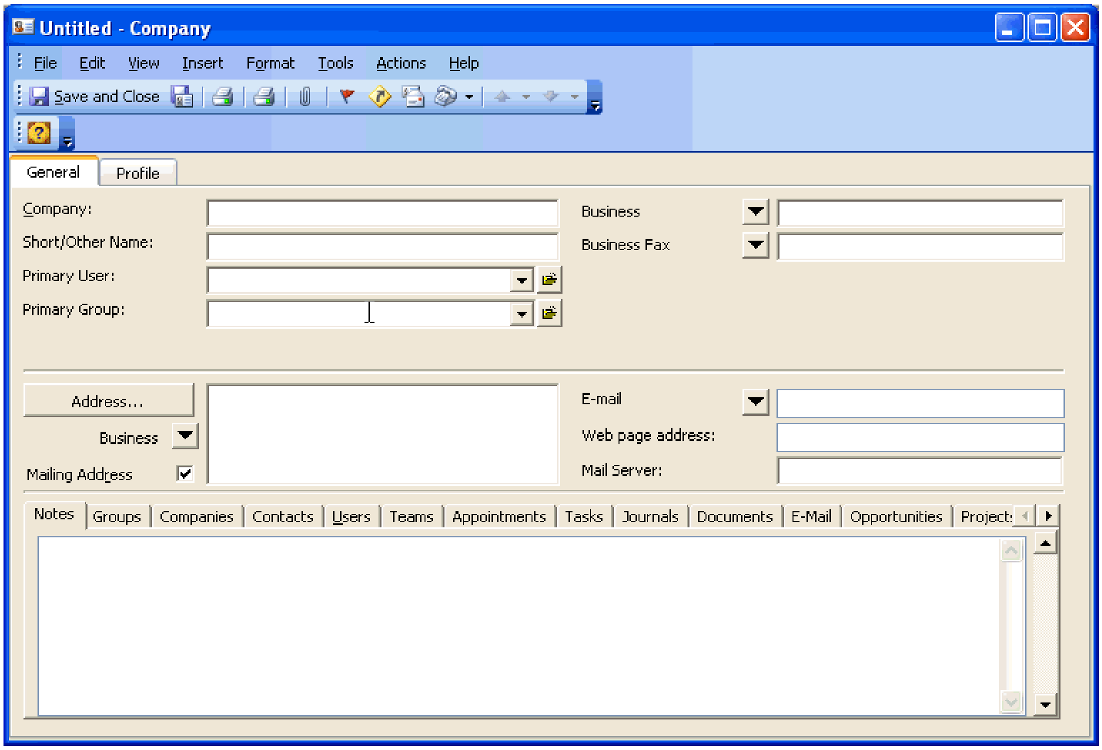
Basic Steps:

1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



2. Click on the **New Item** (Company) button on the **MX-Contact** Toolbar.

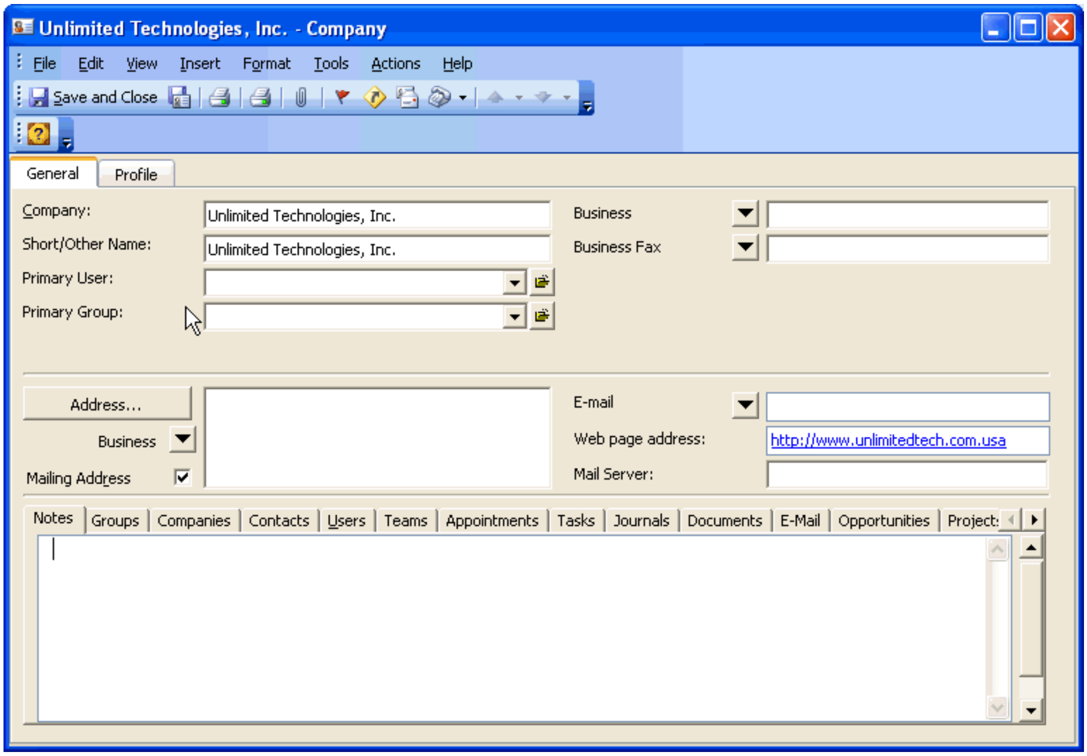
3. A blank **Company** Form will open:



4. In the New Company form, add the details for the company **Unlimited Technologies :**

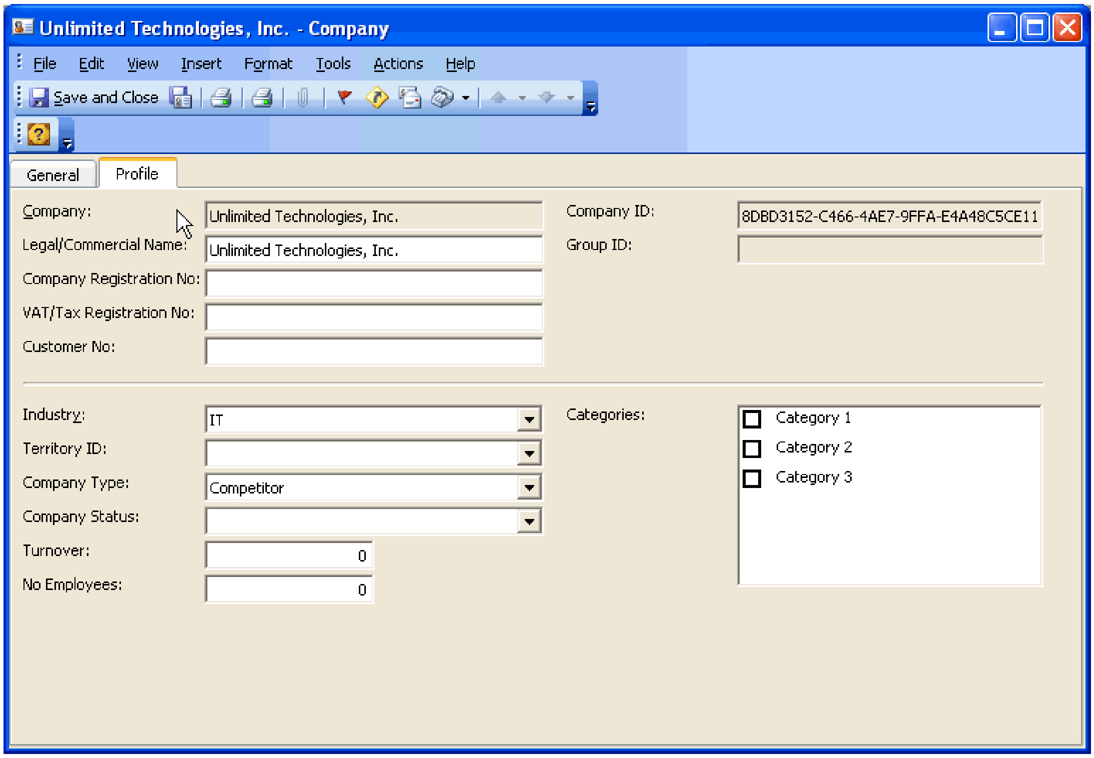
Complete the following information on the General Tab:

Company Name:	**Unlimited Technologies, Inc.**
Web site URL:	**www.unlimitedtech.com.usa**



5. Enter the details for the Profile Tab:

Industry:	**IT**
Company Type:	**Competitor**



6. Click **Save and Close**.

Take me back to the Exercise (Adding a Second Company : Exercise)

Take me to the next Exercise (Adding an Individual Contact : Exercise)

2.5 Adding an Individual Contact : Exercise

Add the following contact:

Complete the following information on the **General** tab:

Name:	**Jim Bothwell**
Primary Company:	**JMB Consultants**
Job Title:	**Consultant**
Mobile:	**+1 (780) 382-0808**
E-Mail:	**jbothwell@hotmail.com.usa**

Complete the following information on the **Profile** tab:

Interests:	**Golf, Tennis**

Show me the Solution (Adding an Individual Contact : Solution)

2.6 Adding an Individual Contact : Solution

Add the following contact:

Complete the following information on the **General** tab:

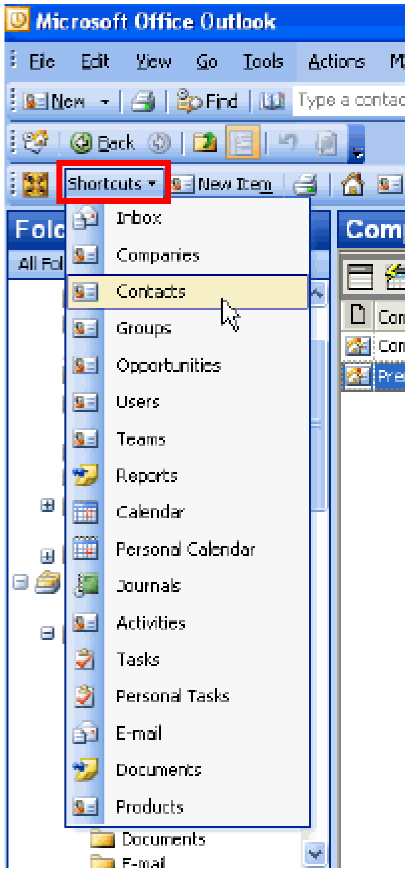
Name:	**Jim Bothwell**
Primary Company:	**JMB Consultants**
Job Title:	**Consultant**
Mobile:	**+1 (780) 382-0808**
E-Mail:	**jbothwell@hotmail.com.usa**

Complete the following information on the **Profile** tab:

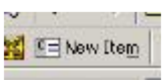
Interests:	**Golf, Tennis**

Basic Steps:

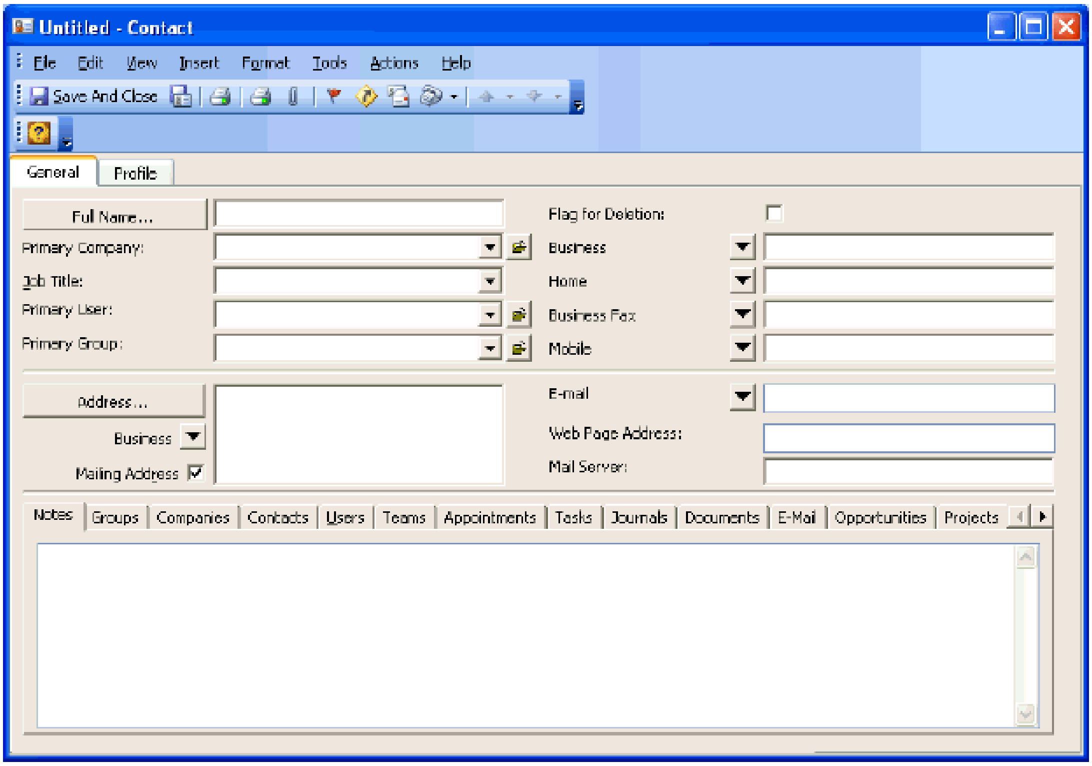
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



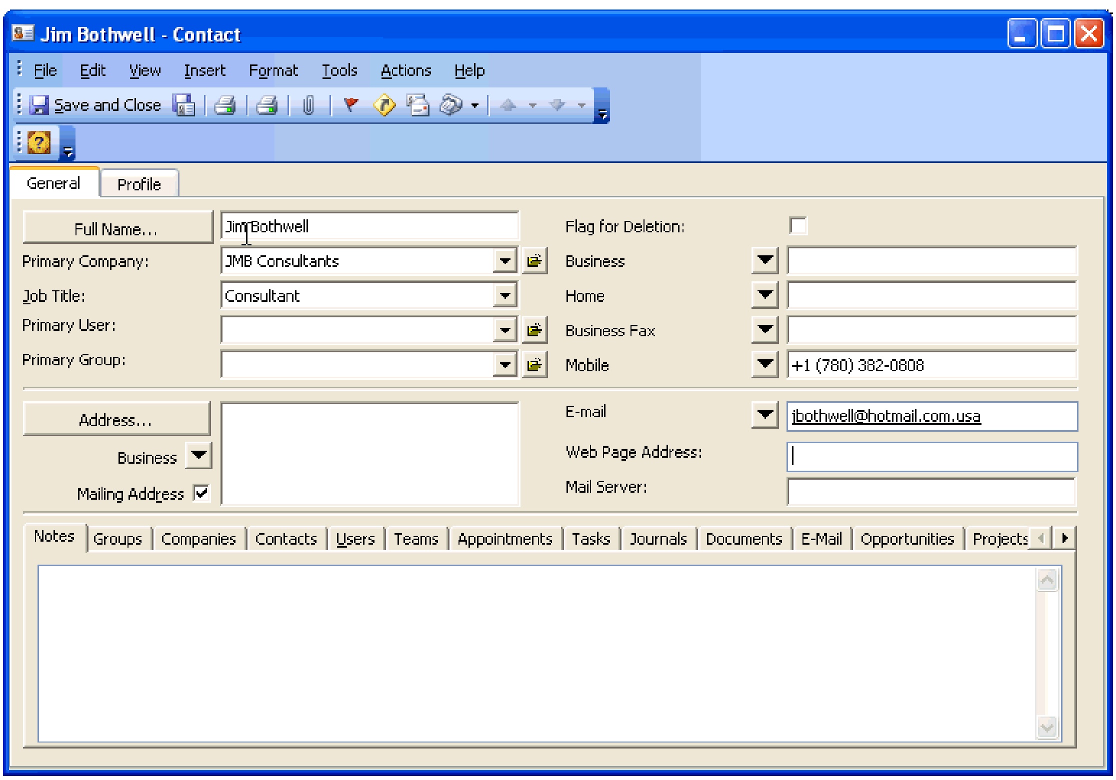
2. Click on the **New Item (Contact)** button on the MX-Contact Toolbar:



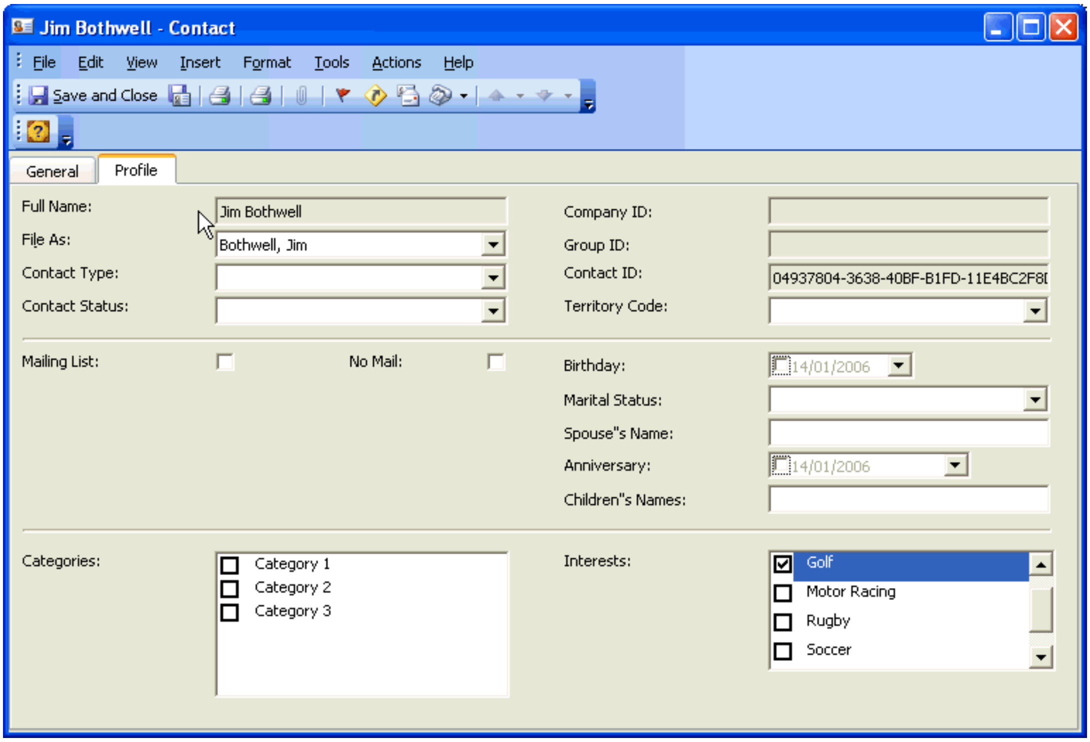
3. A blank Contact Form opens:



4. Enter the details for **Jim Bothwell** on the **General** Tab (**Note:** type in **Consultant** under **Job Title**):



5. Enter the details for **Jim Bothwell** on the **Profile** Tab:



6. Click **Save and Close**

Take me back to the Exercise (Adding an Individual Contact : Exercise)

Take me to the next Exercise (Adding a Contact with Company Information : Exercise)

2.7 Adding a Contact with Company Information : Exercise

Add the following contact:

Complete the following information on the **General** tab:

Name:	**Barney Anderson**
Company:	**Premier Foods**
Title:	**IT Manager**
Business Telephone:	**+1 (206) 555-8411**
Business Fax:	**+1 (206) 555-6687**
Address:	**305 14th Ave. Suite B, Seattle, WA, 98128**
E-Mail:	**barneya@permierfoods.com.usa**
Web Page Address:	**www.premierfoods.com.usa**

Complete the following information on the **Profile** tab:

Interests:	**Golf, Tennis**

Show me the Solution (Adding a Contact with Company Information : Solution)

2.8 Adding a Contact with Company Information : Solution

Add the following contact:

Complete the following information on the **General** tab:

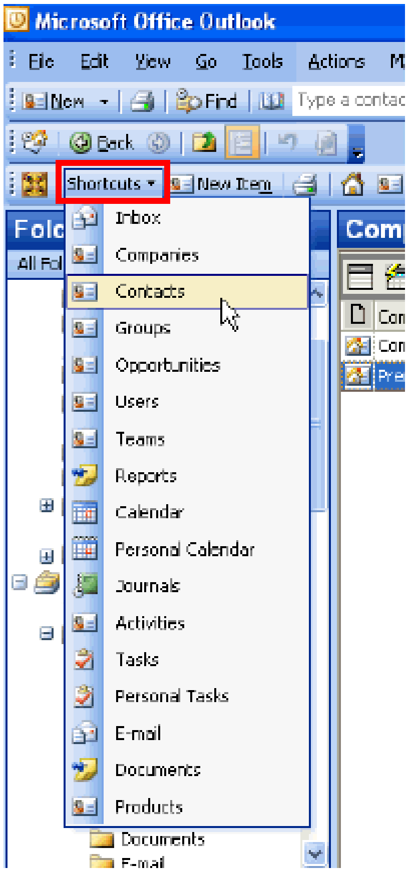
Name:	**Barney Anderson**
Company:	**Premier Foods**
Title:	**IT Manager**
Business Telephone:	**+1 (206) 555-8411**
Business Fax:	**+1 (206) 555-6687**
Address:	**305 14th Ave. Suite B, Seattle, WA, 98128**
E-Mail:	**barneya@premierfoods.com.usa**
Web Page Address:	**www.premierfoods.com.usa**

Complete the following information on the **Profile** tab:

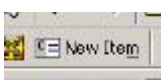
Interests:	**Golf, Tennis**

Basic Steps:

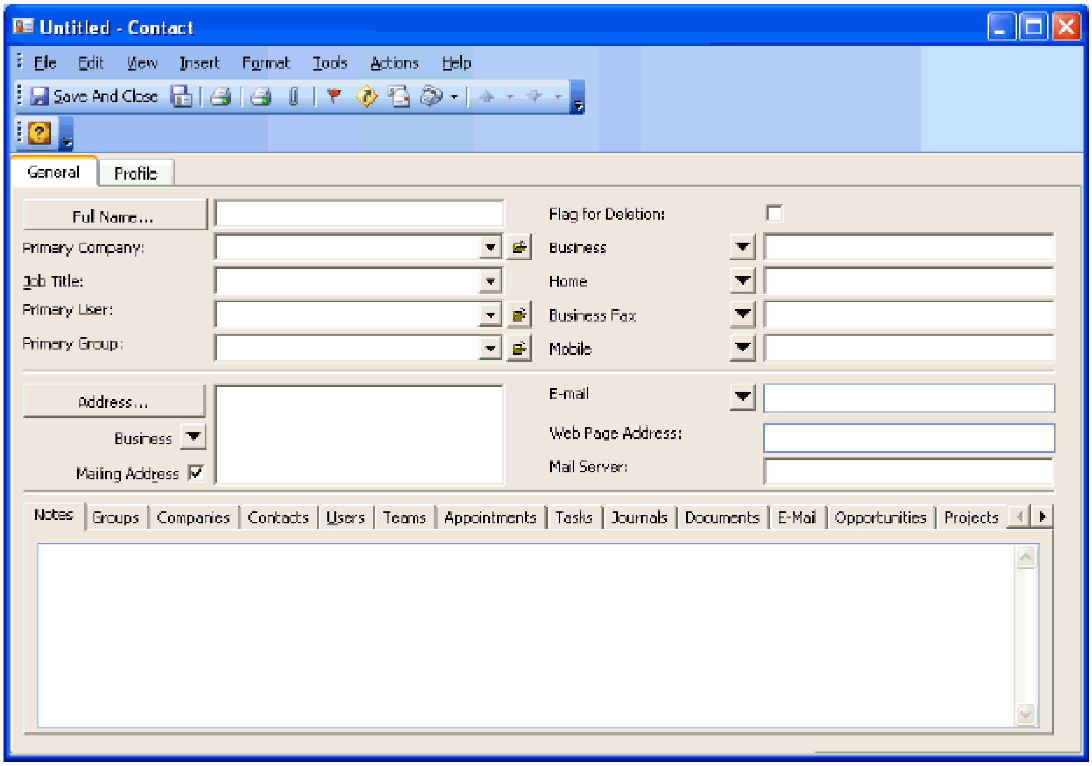
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



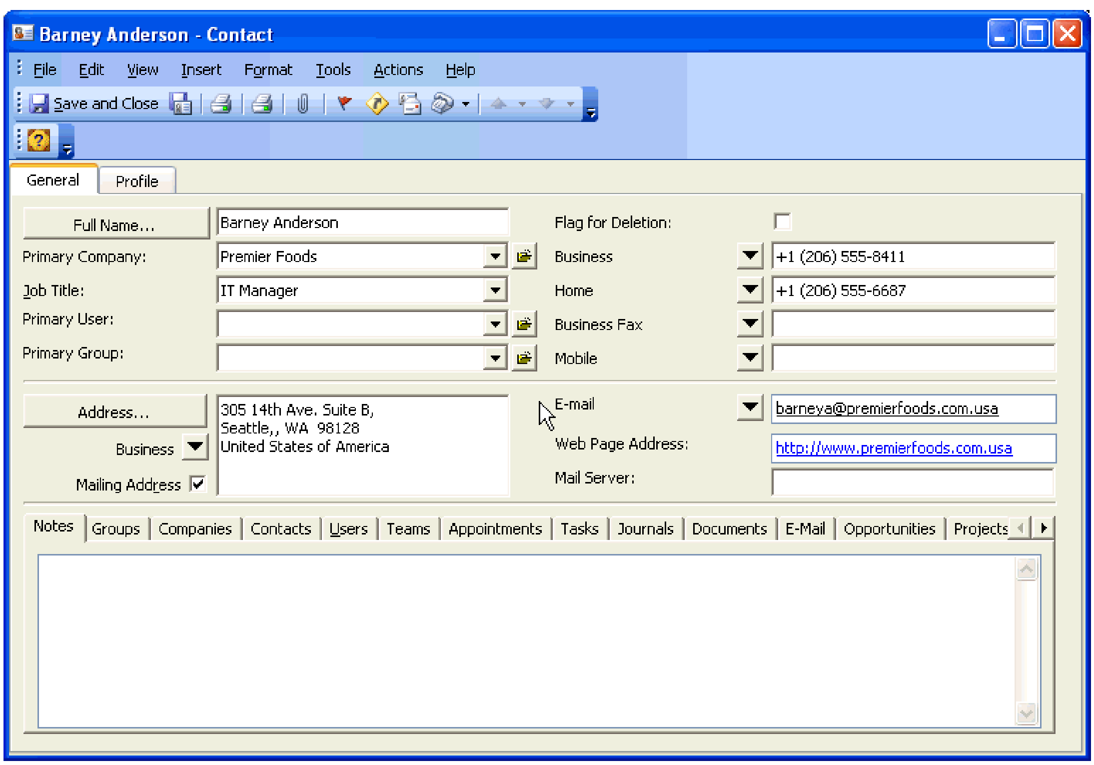
2. Click on **New Item** (Contact) on the MX-Contact Toolbar:



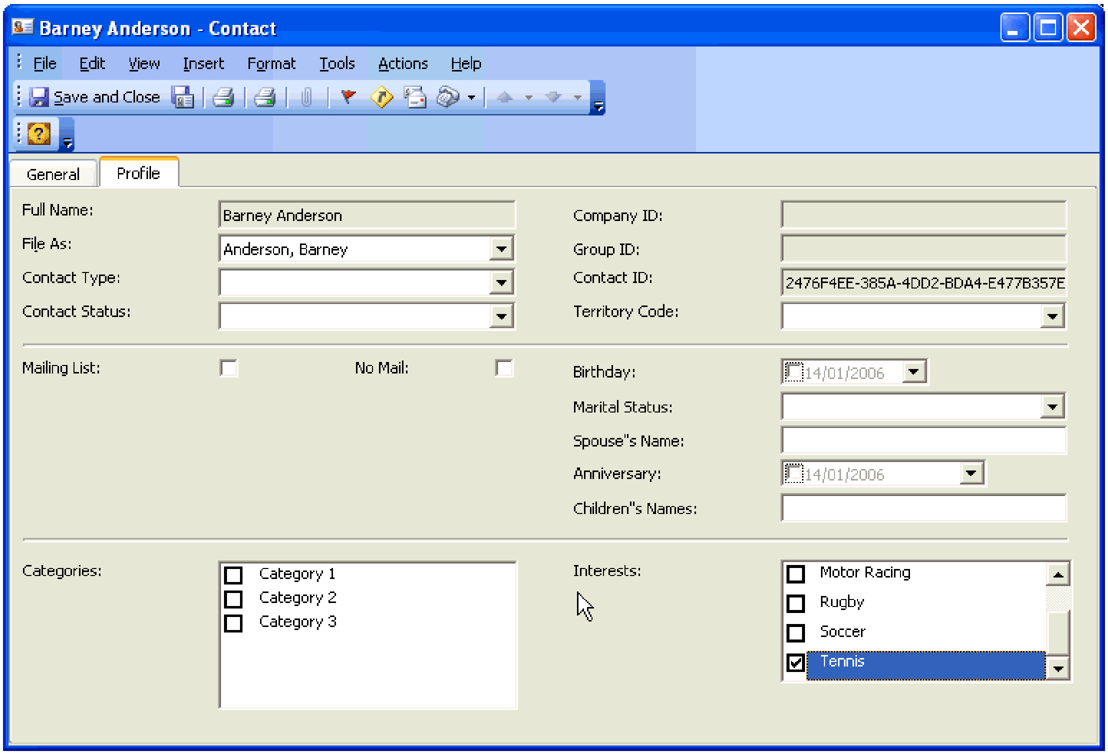
3. A blank Contact Form will de displayed:



4. Enter the details for **Barney Anderson** on the **General** Tab:



5. Enter the details for **Barney Anderson** on the **Profile** Tab:



6. Click **File, Save** (Don't close as yet)

Take me back to Exercise (Adding a Contact with Company Information : Exercise)

Take me to the next Exercise (Adding a Company from a Contact : Exercise)

2.9 Adding a Company from a Contact : Exercise

Add the Company **Premier Foods** from **Barney Anderson's** Contact Form.

Company:	**Premier Foods**
Industry:	**Hotel/Restaurant**
Company Type:	**Prospect**

Show me the **Solution** (Adding a Company from a Contact : Solution)

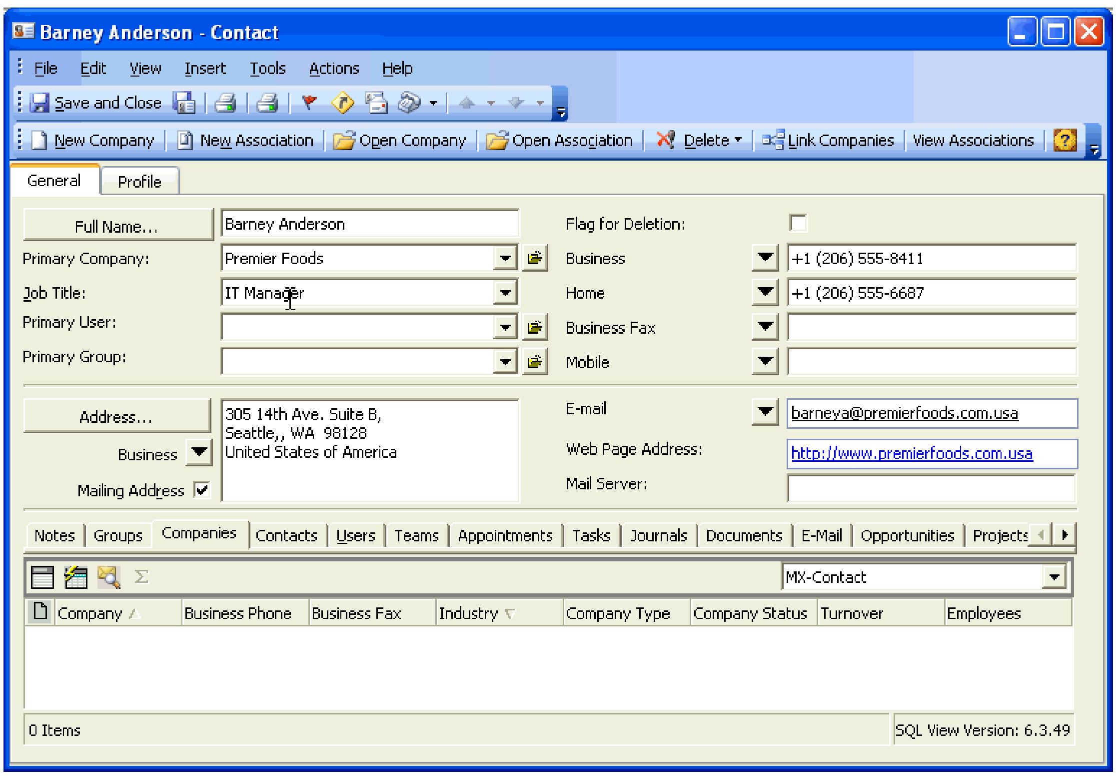
2.10 Adding a Company from a Contact : Solution

Add the Company **Premier Foods** from **Barney Anderson's** Contact Form.

Company:	**Premier Foods**
Industry:	**Hotel/Restaurant**
Company Type:	**Prospect**

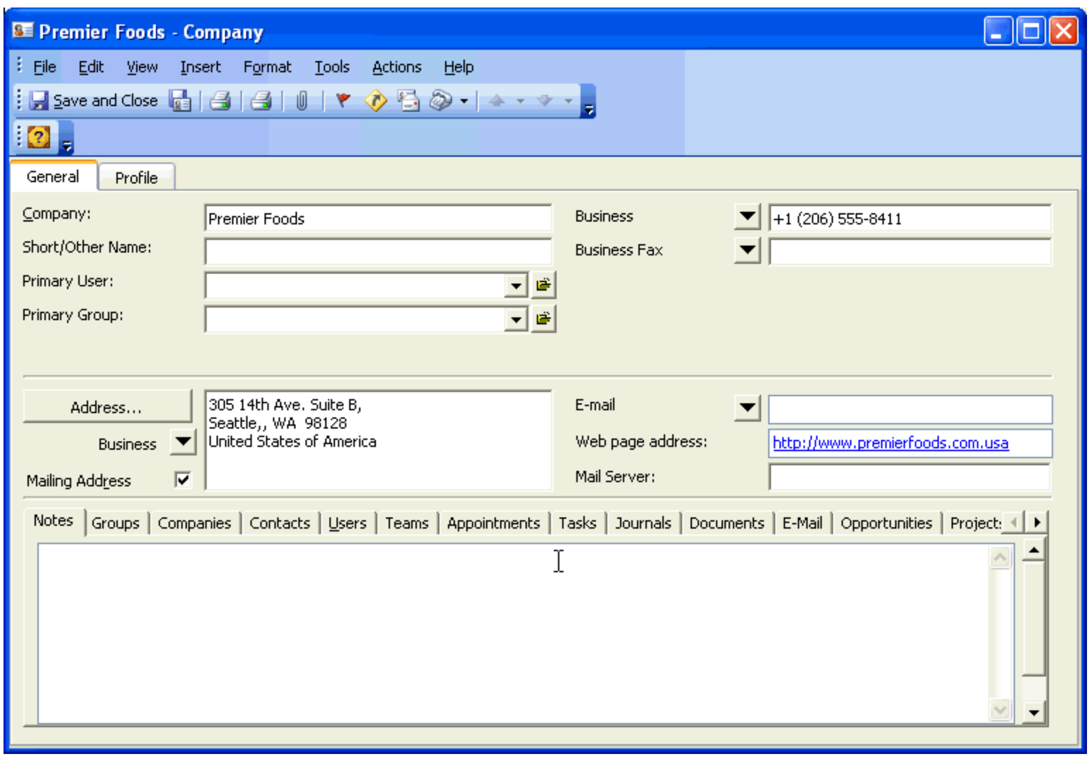
Basic Steps:

1. **Open** the Contact **Barney Anderson** (if not open from the previous exercise)
2. Click on the **Companies** Tab:

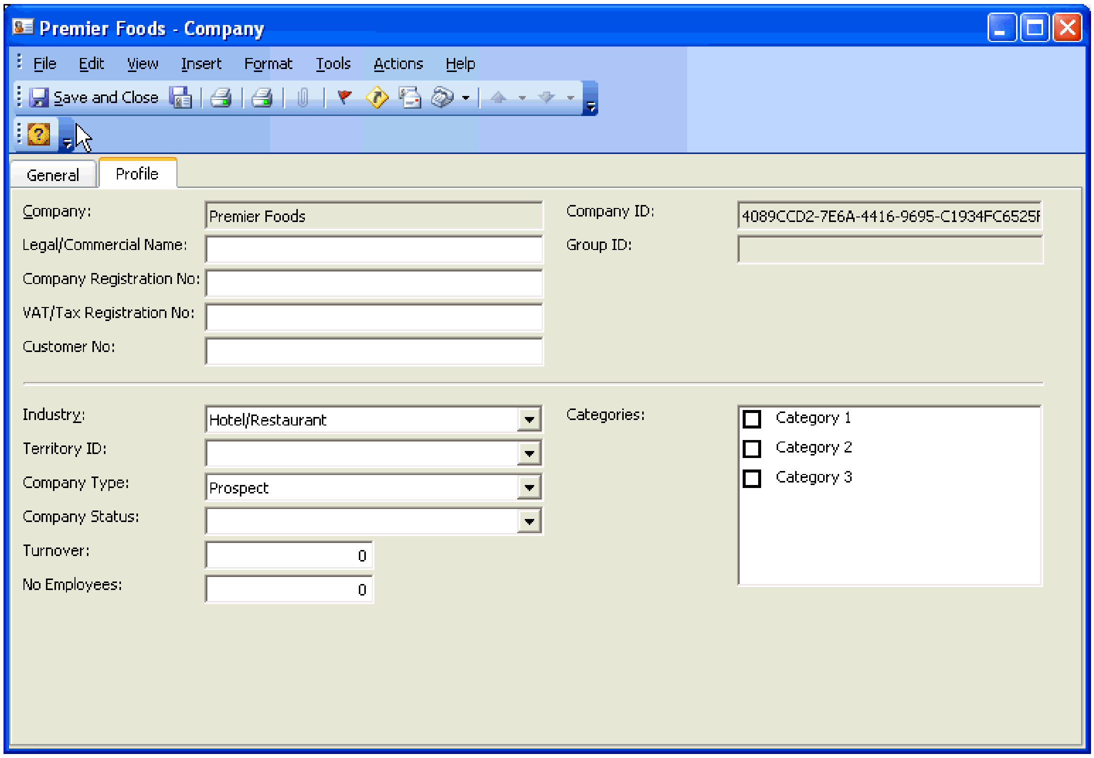


3. Click on **New Company** on the **MX-Contact** Toolbar:

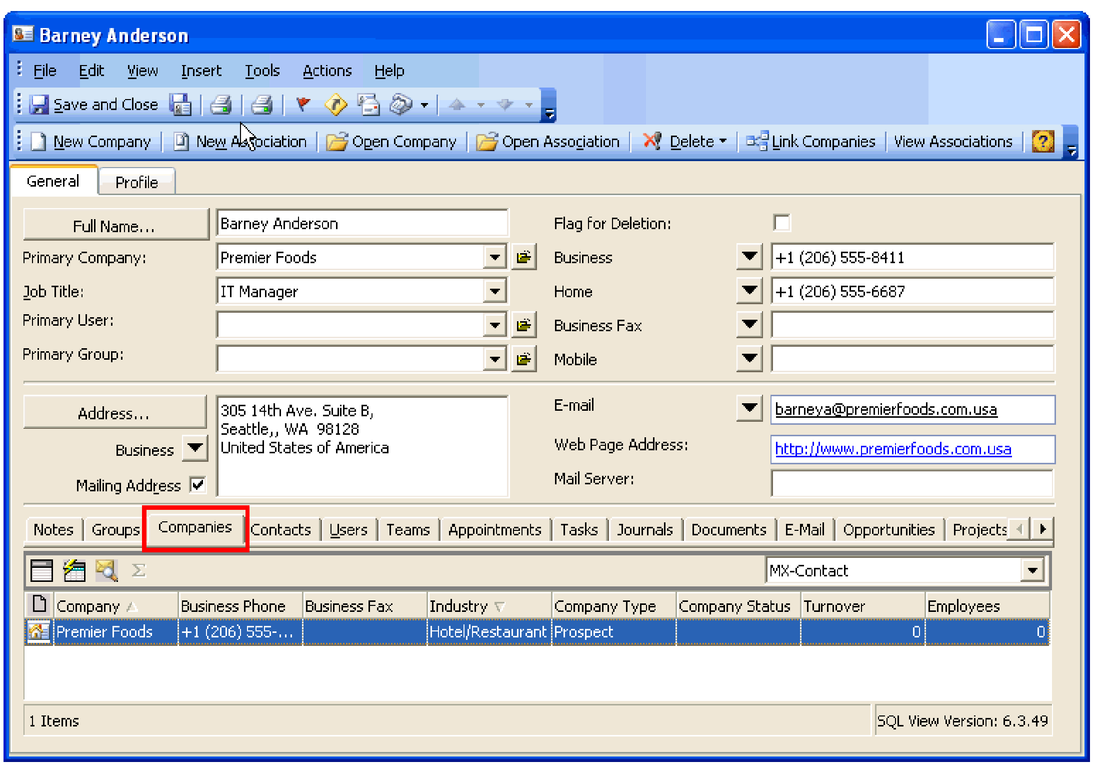
4. Complete the details for **Premier Foods** on the **General** Tab (**Note:** the E-Mail address will be carried across to the company from the contact and should ordinarily be removed):



5. Complete the details for **Premier Foods** on the **Profile** Tab:



6. Click **Save and Close** from the Company Form. You should see the company listed in the **Companies** Tab:



7. Click **Save and Close** from the Contact Form.

Take me back to the Exercise (Adding a Company from a Contact : Exercise)

Take me to the next Exercise (Adding a Contact from a Company : Exercise)

2.11 Adding a Contact from a Company : Exercise

Add the Contact **Gillian Meyer** as a second Contact for **Premier Foods** from the Company Form.

Name:	**Gillian Meyer**
Job Title:	**VP - Information Systems**
E-Mail:	**gillianm@premierfoods.com.usa**

Show me the **Solution** (Adding a Contact from a Company : Solution)

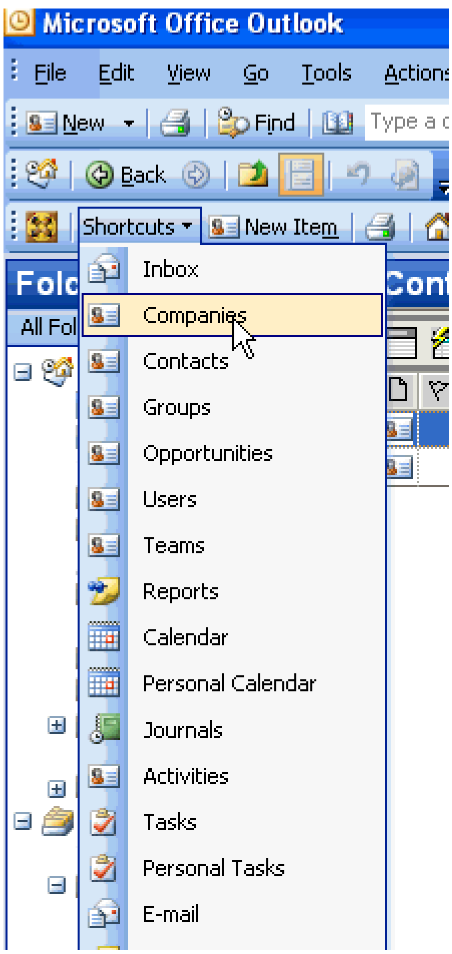
2.12 Adding a Contact from a Company : Solution

Add the Contact **Gillian Meyer** as a second Contact for **Premier Foods** from the Company Form.

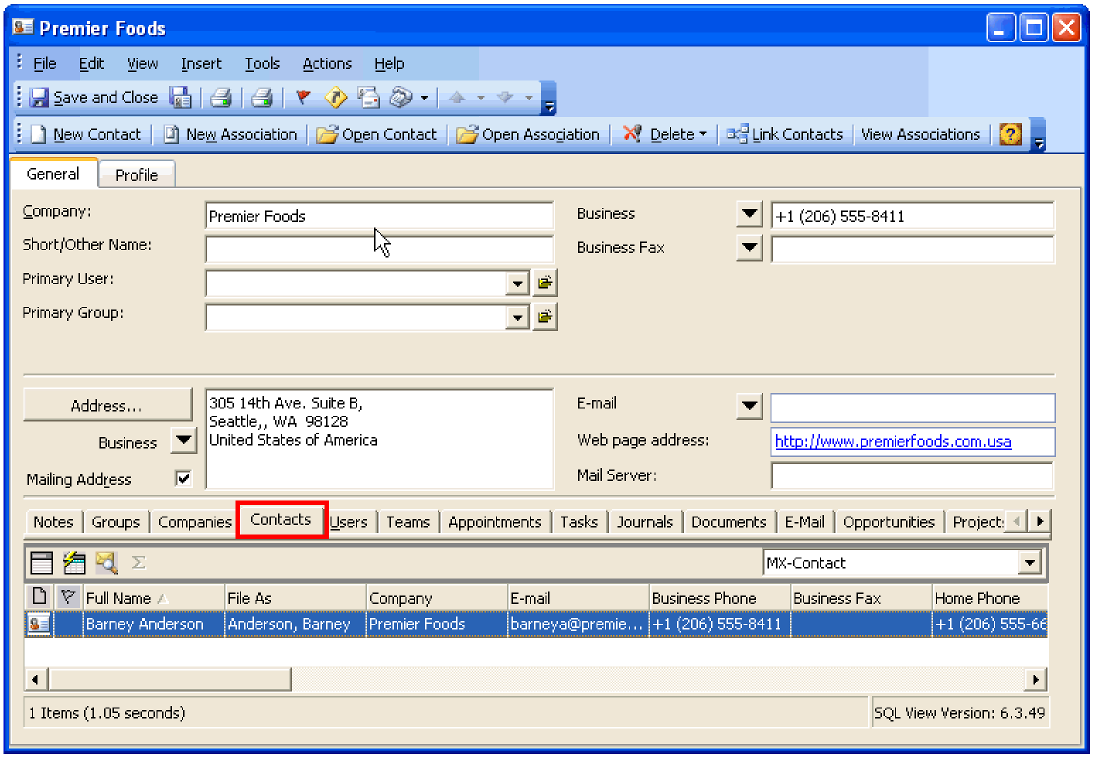
Name:	**Gillian Meyer**
Job Title:	**VP - Information Systems**
E-Mail:	**gillianm@premierfoods.com.usa**

Basic Steps:

1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:

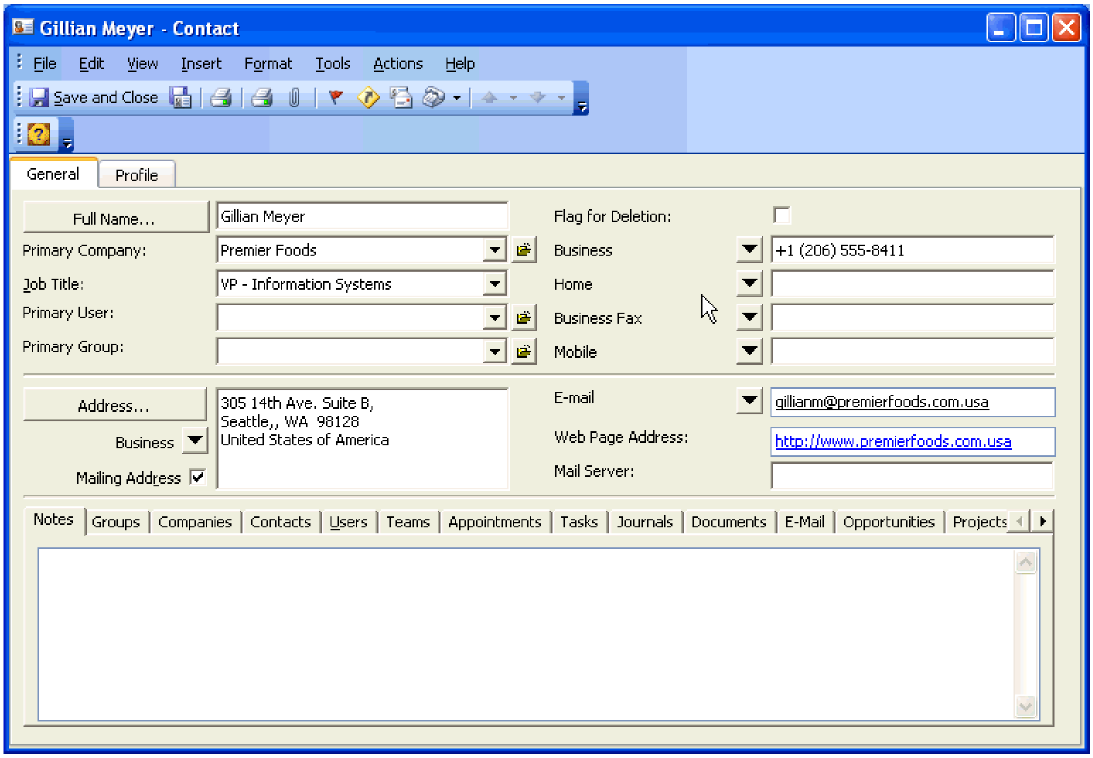


2. Open the Company **Premier Foods**
3. Click on the **Contacts** Tab:

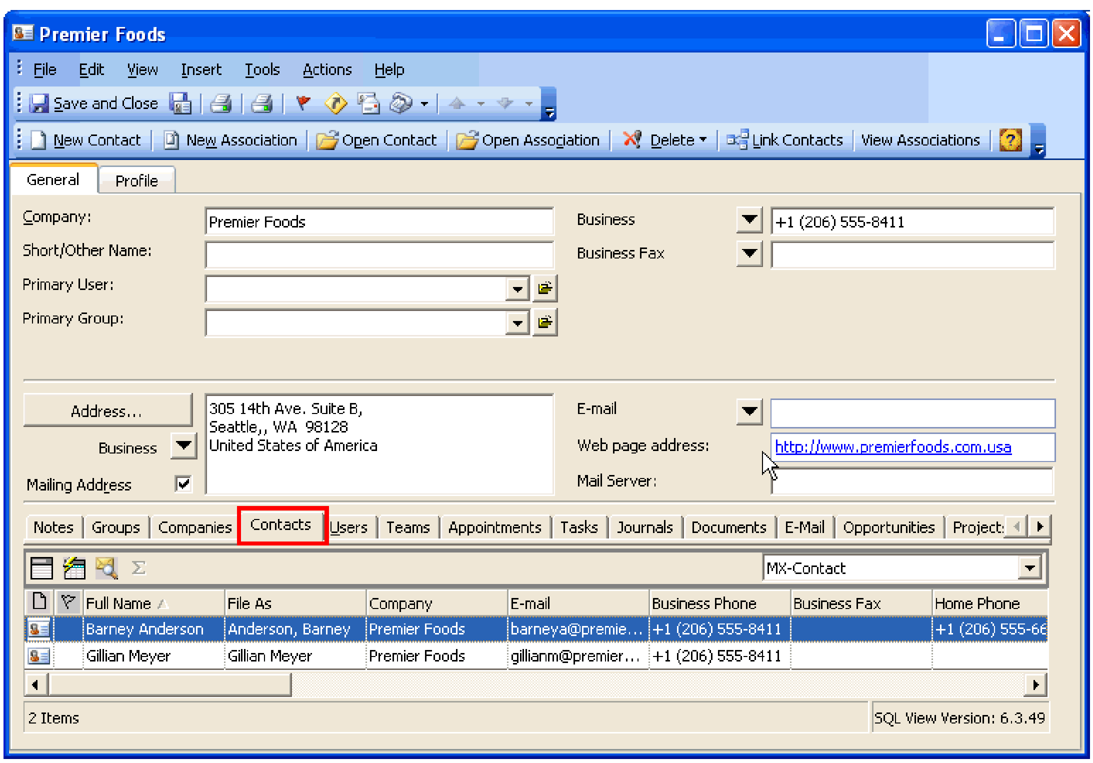


4. Click on **New Contact** to add the contact:

5. A blank Contact Form will open but with the Company address, phone, fax etc carried over. Enter **Gillian Meyer's** details on the **General** Tab (**Note:** type in **VP - Information Systems** under **Job Title**):



6. Click **Save and Close** from the Contact Form. You should now see 2 contacts in the **Contacts** Tab:



7. Click **Save and Close** on the Company Form.

Take me back to the Exercise (Adding a Contact from a Company : Exercise)

Take me to the next Exercise (Associating a Company to a Contact : Exercise)

2.13 Associating a Company to a Contact : Exercise

Associate the Contact **Jim Bothwell** to **Premier Foods** as a Consultant.

Associating Company:	**Premier Foods**
Relationship:	**Client**
Associated Contact:	**Jim Bothwell**
Relationship:	**Consultant**

Show me the **Solution** (Associating a Company to a Contact : Solution)

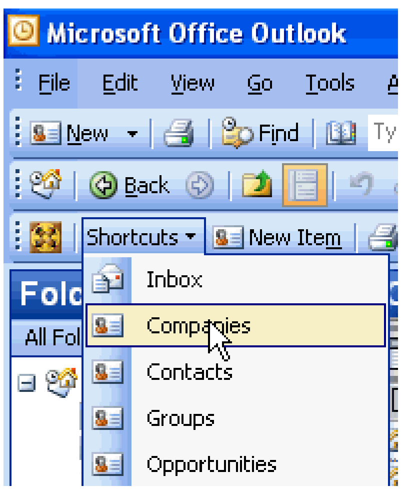
2.14 Associating a Company to a Contact : Solution

Associate the Contact **Jim Bothwell** to **Premier Foods** as a Consultant.

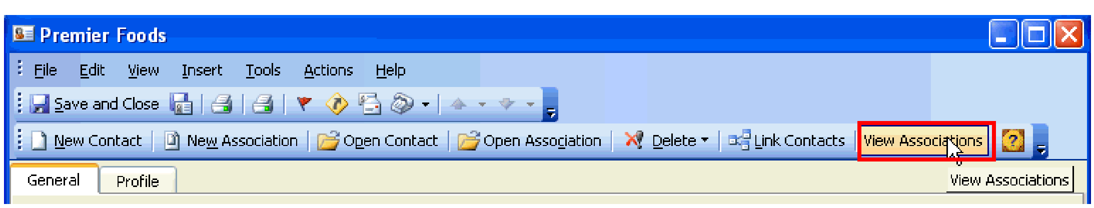
Associating Company:	**Premier Foods**
Relationship:	**Client**
Associated Contact:	**Jim Bothwell**
Relationship:	**Consultant**

Basic Steps:

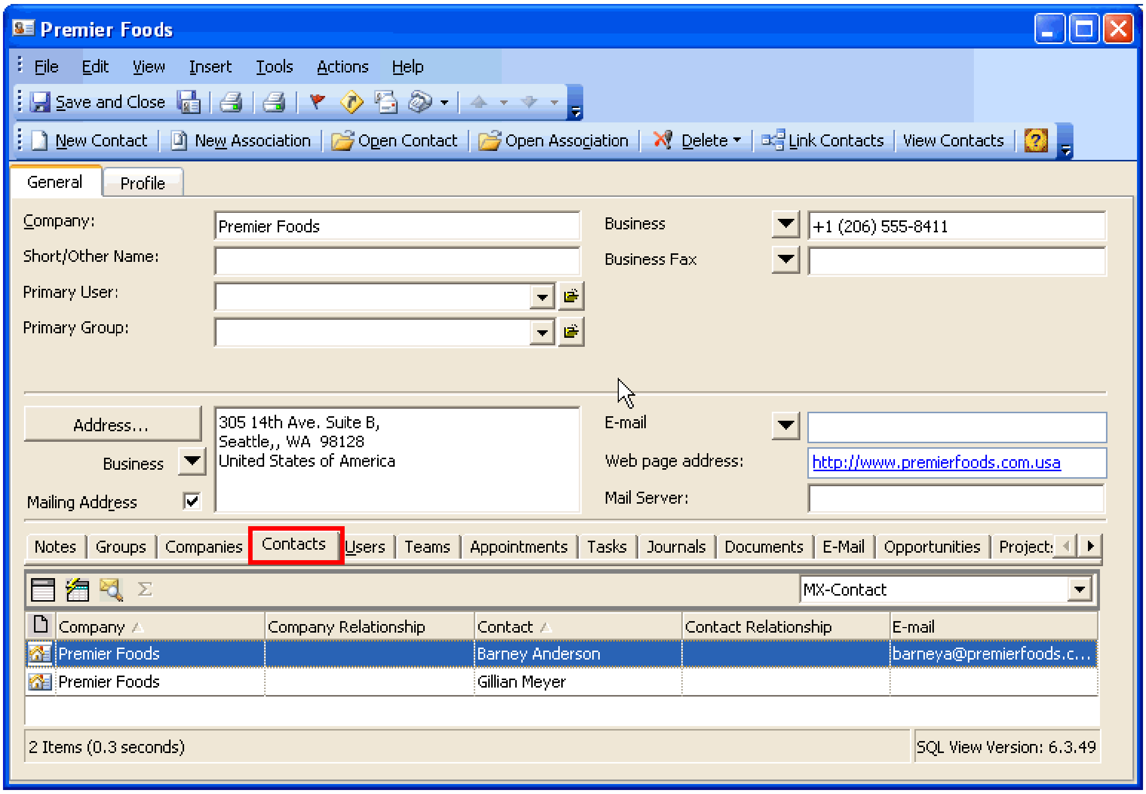
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



2. Open the Company **Premier Foods**
3. Click on the **Contacts** Tab
4. Click on **View Associations:**

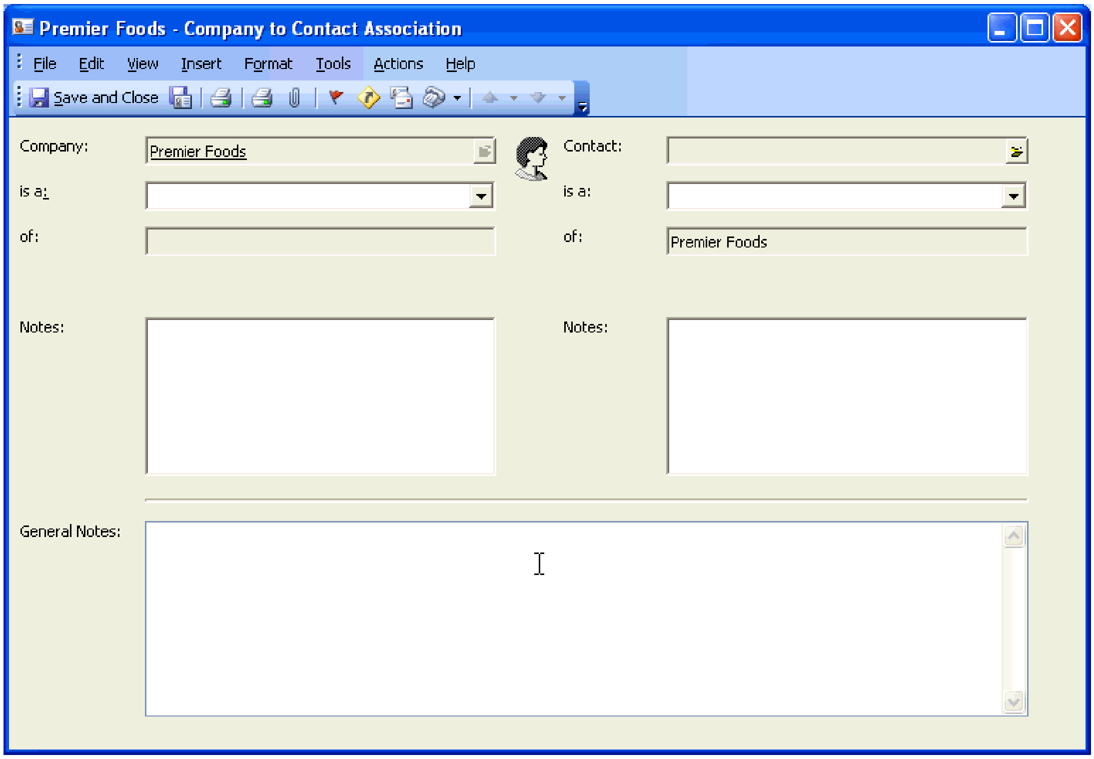


5. The **Company to Contact Associations** will be displayed on the Contacts Tab.

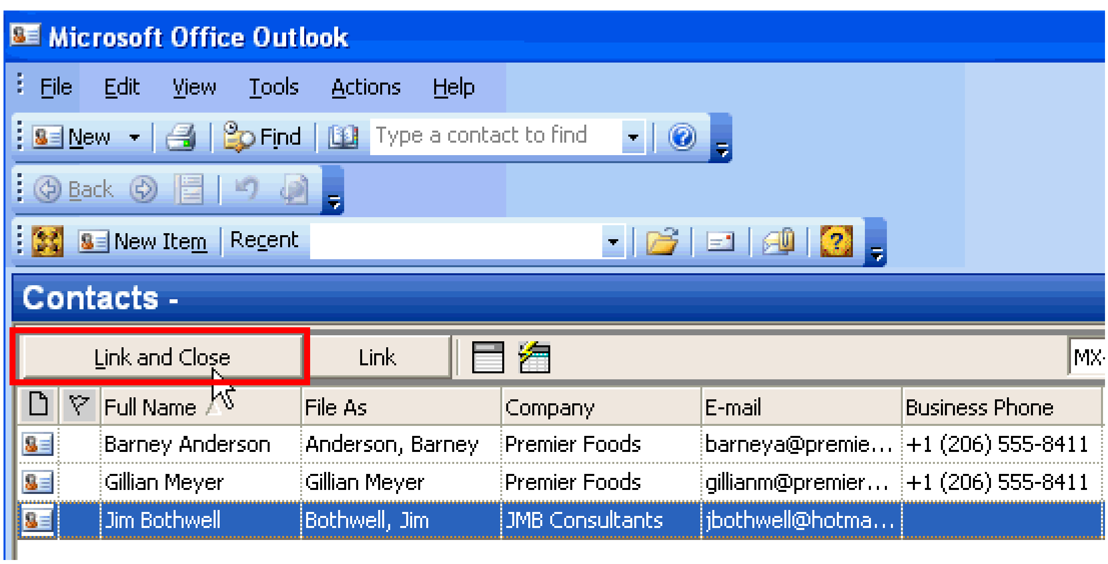


6. Click on **New Association**.

7. A **Company to Contact Association Form** will open. Click on the **Search (Contacts)** button on the Association Form:

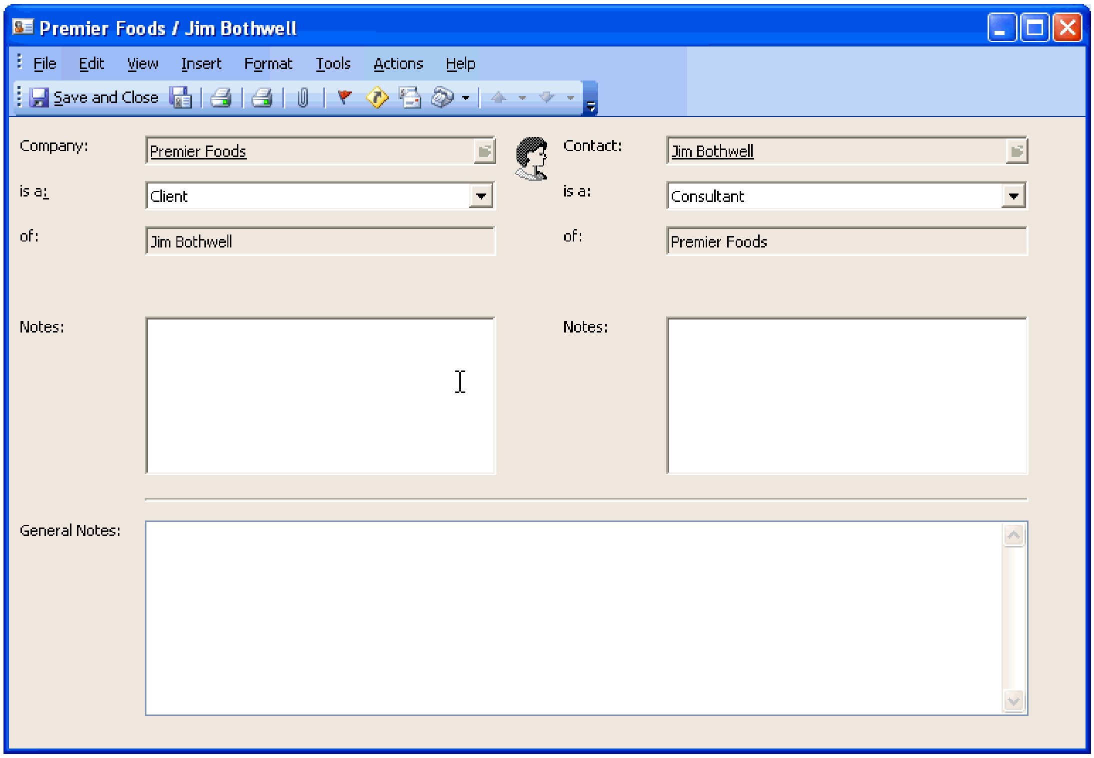


8. Highlight **Jim Bothwell**:

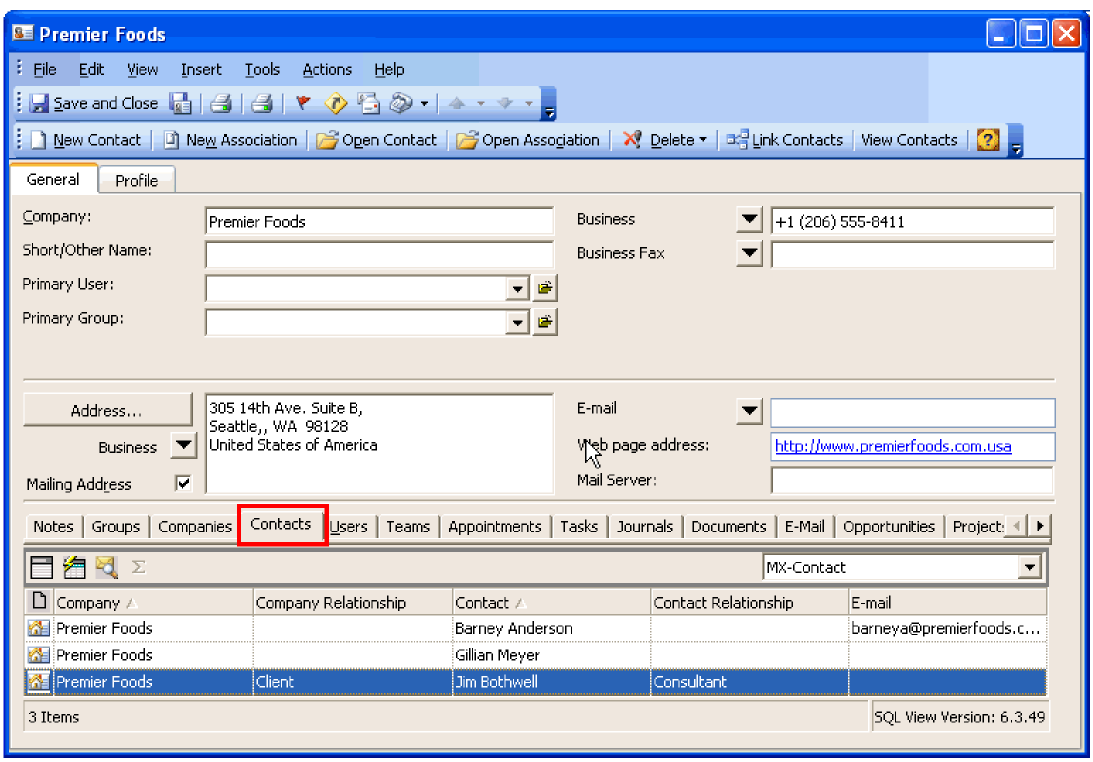


9. Click **Link and Close** (button shown above).

10. Enter the Association details:



11. Click **Save and Close** on the Association Form. You should see 3 contacts associated (linked) to Premier Foods:



12. Click **Save and Close** on the Company Form

Take me back to the Exercise (Associating a Company to a Contact : Exercise)

Take me to the next Exercise (Linking a Company to a Contact : Exercise)

2.15 Linking a Company to a Contact : Exercise

Add the following contact:

Complete the following information on the **General** tab:

Name:	**Johnny Walker**
Job Title:	**Account Manager**
Address:	**722 da Vinci Boulevard, Kirkland, WA, 98034**
Mobile:	**+1 (780) 382-0808**
E-Mail:	**johnny.walker@compaq.com.usa**

Complete the following information on the **Profile** tab:

Interests:	Golf

Link the contact **Johnny Walker** to the company **Compaq Corporation (Seattle)**.

Show me the **Solution** (Linking a Company to a Contact : Solution)

2.16 Linking a Company to a Contact : Solution

Add the following contact:

Complete the following information on the **General** tab:

Name:	**Johnny Walker**
Job Title:	**Account Manager**
Mobile:	**+1 (780) 382-0808**
E-Mail:	**johnny.walker@compaq.com.usa**

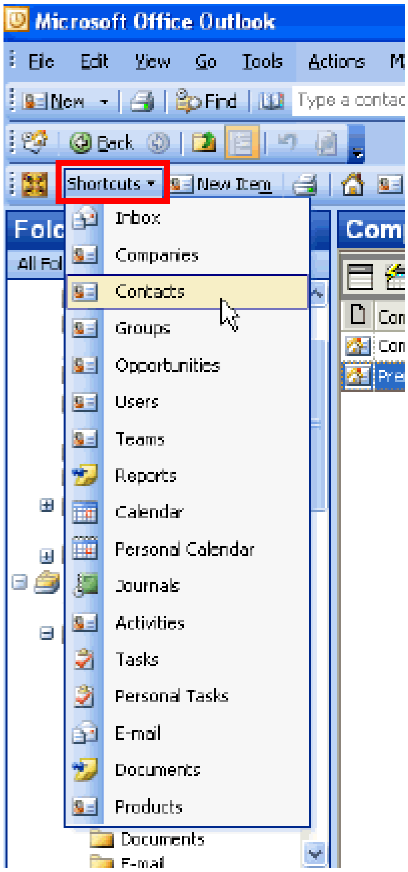
Complete the following information on the **Profile** tab:

Interests:	**Golf**

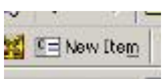
Link the contact **Johnny Walker** to the company **Compaq Corporation (Seattle)**.

Basic Steps:

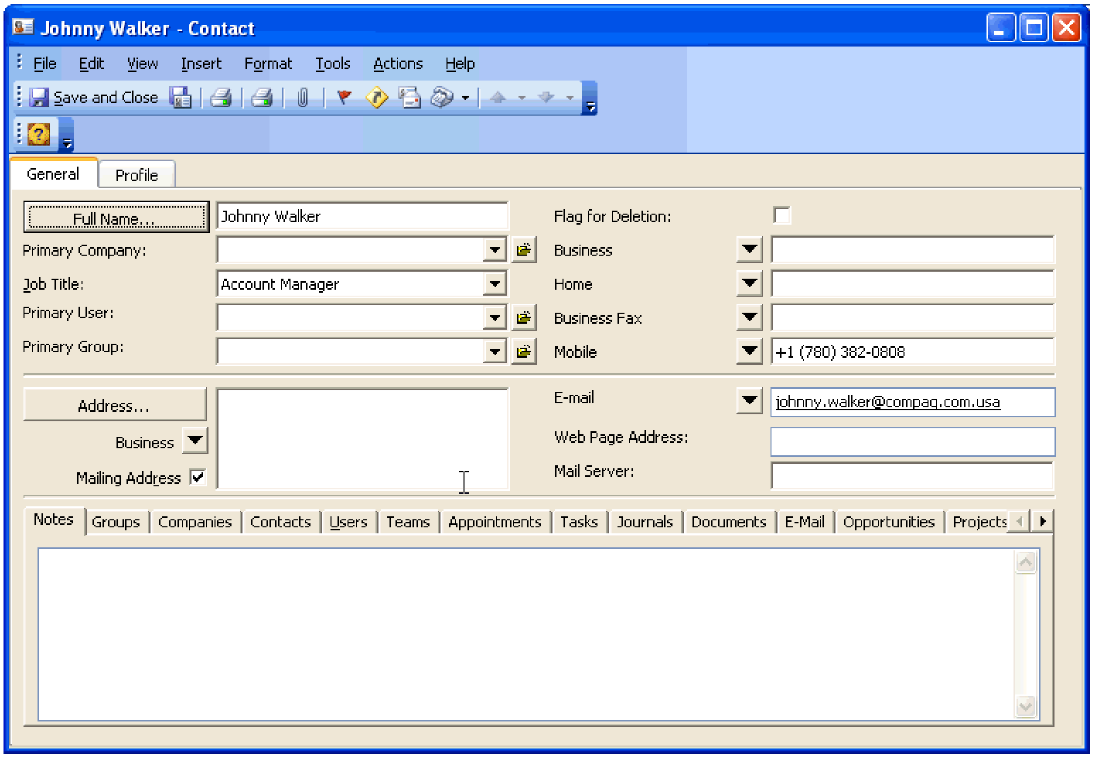
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



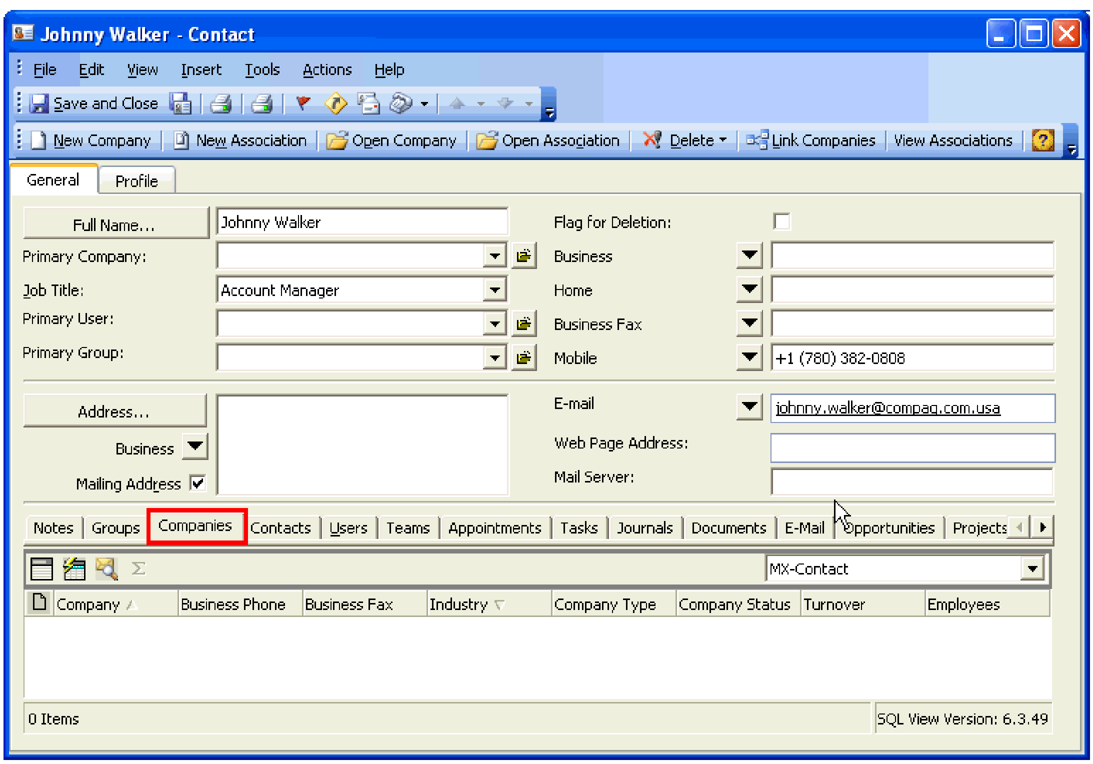
2. Click on **New Item** (Contact) on the MX-Contact Toolbar:



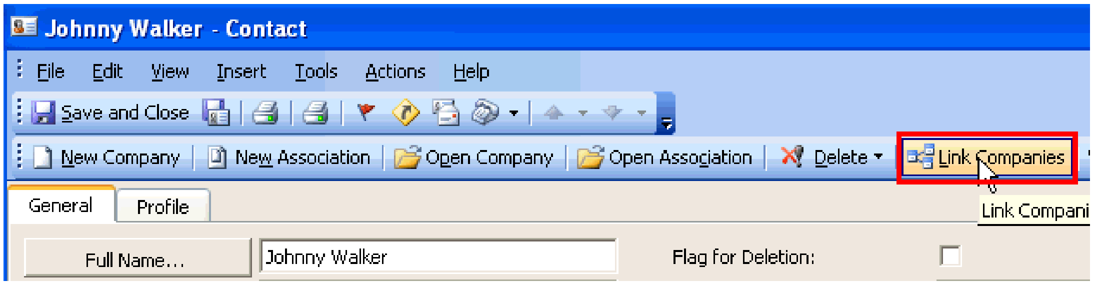
3. Enter the details for **Johnny Walker** (**Note:** type in **Account Manager** under **Job Title**):



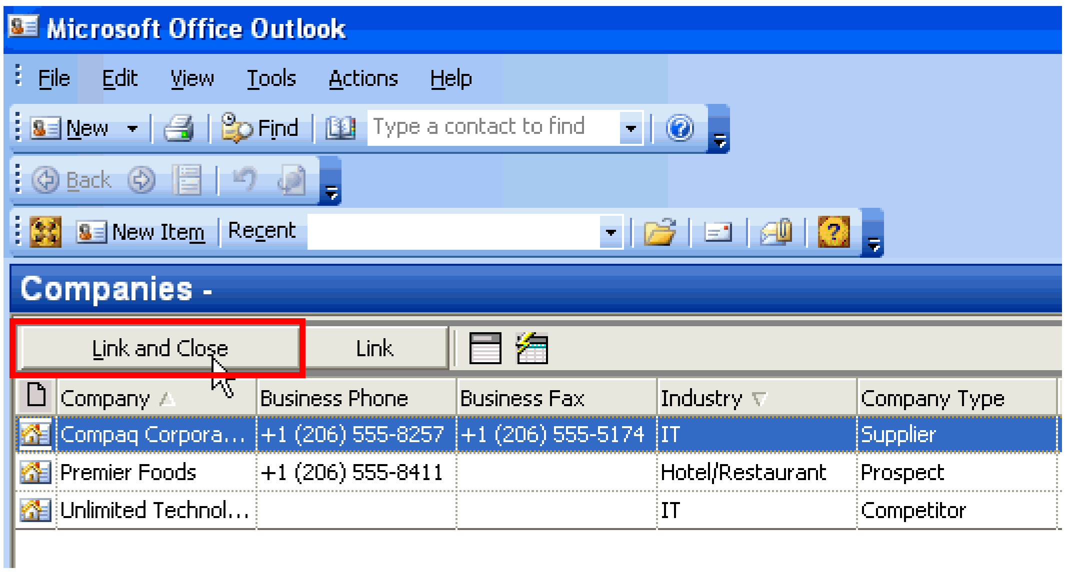
4. Click on the **Companies** Tab.



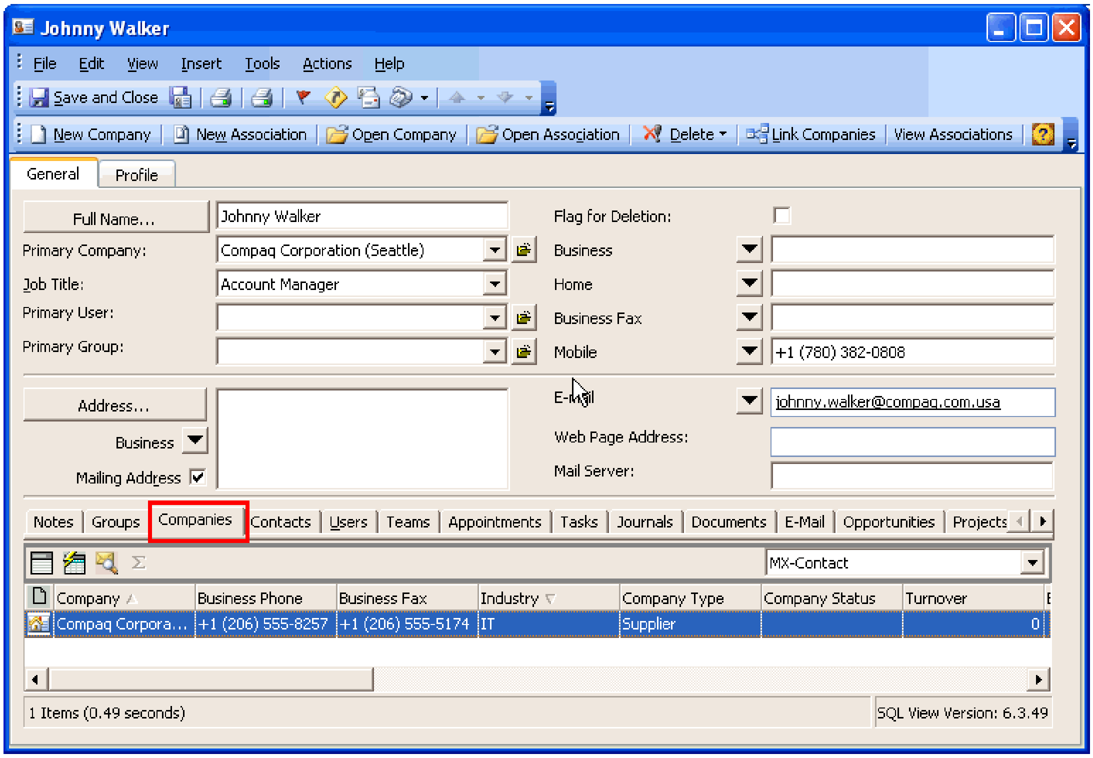
5. Click on **Link Companies**:



6. Search for and highlight **Compaq Corporation**:



7. Click **Link and Close**, as shown above. You should now see **Compaq Corporation** linked to **Johnny Walker** in the **Companies** Tab:



8. Click **Save and Close** on the Contact Form

Take me back to the Exercise (Linking a Company to a Contact : Exercise)

Take me to the next Exercise (Associating a Contact to another Contact : Exercise)

2.17 Associating a Contact to another Contact : Exercise

Associate **Gillian Meyer** to **Barney Anderson**.

Associating Contact:	**Gillian Meyer**
Relationship:	**Manager of**
Associated Contact:	**Barney Anderson**
Relationship:	**Reports to**

Show me the Solution (Associating a Contact to another Contact : Solution)

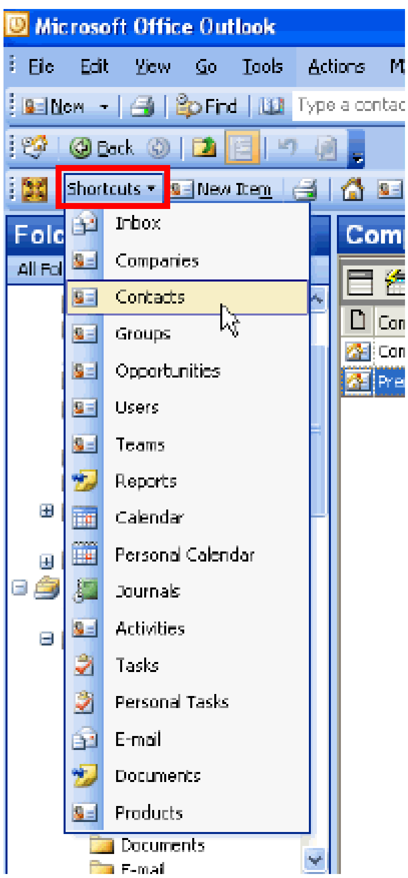
2.18 Associating a Contact to another Contact : Solution

Associate **Gillian Meyer** to **Barney Anderson**.

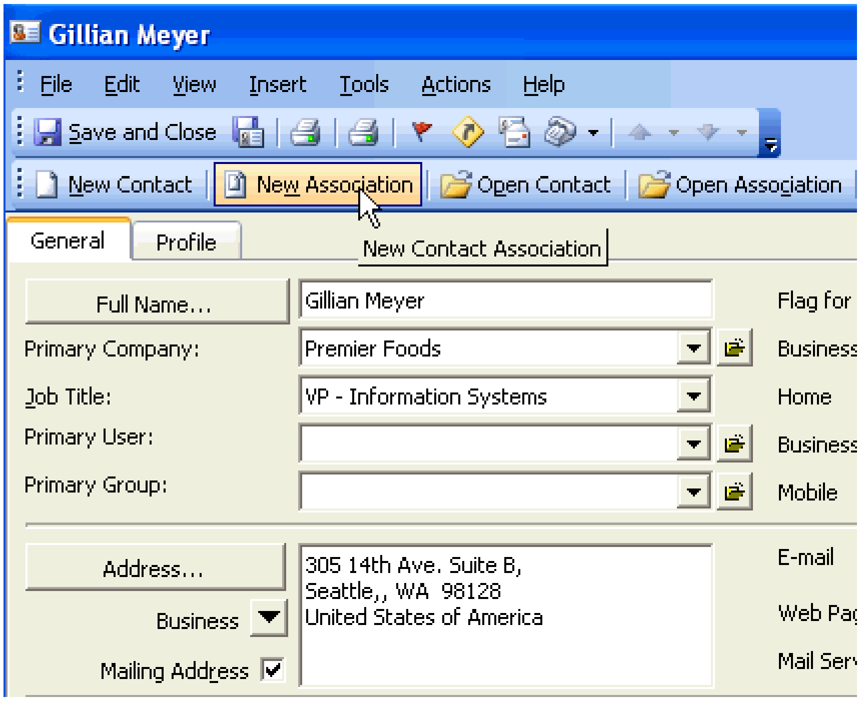
Associating Contact:	**Gillian Meyer**
Relationship:	**Manager of**
Associated Contact:	**Barney Anderson**
Relationship:	**Reports to**

Basic Steps

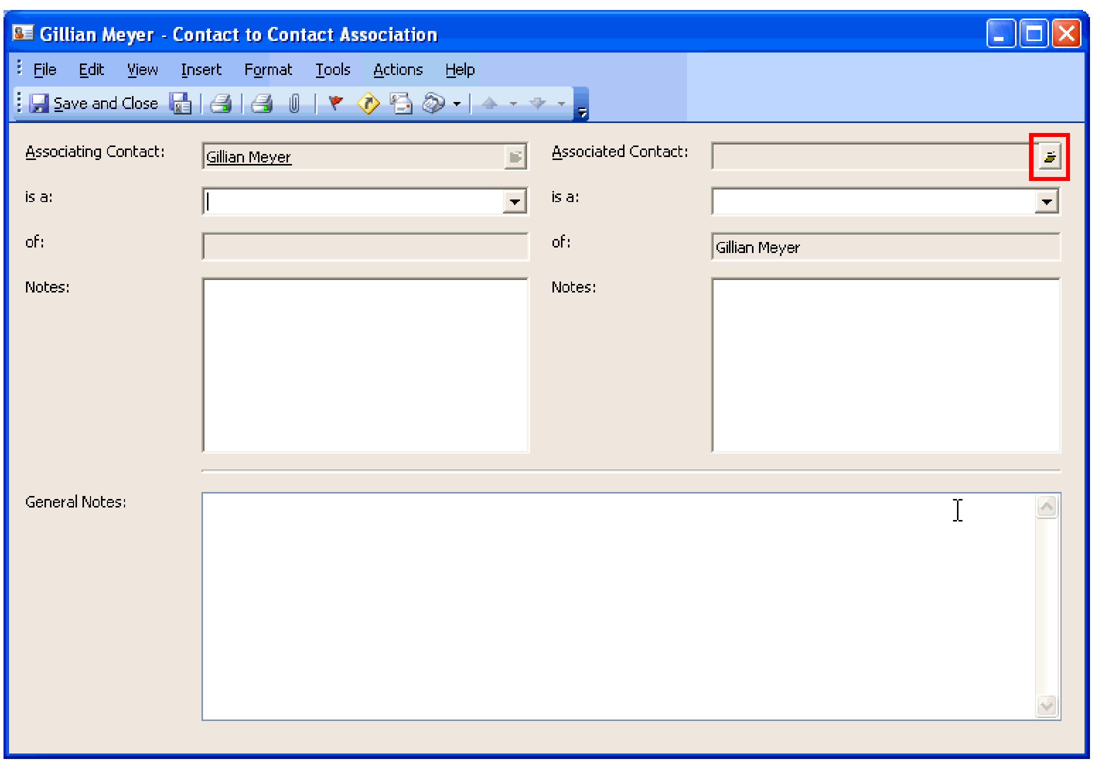
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



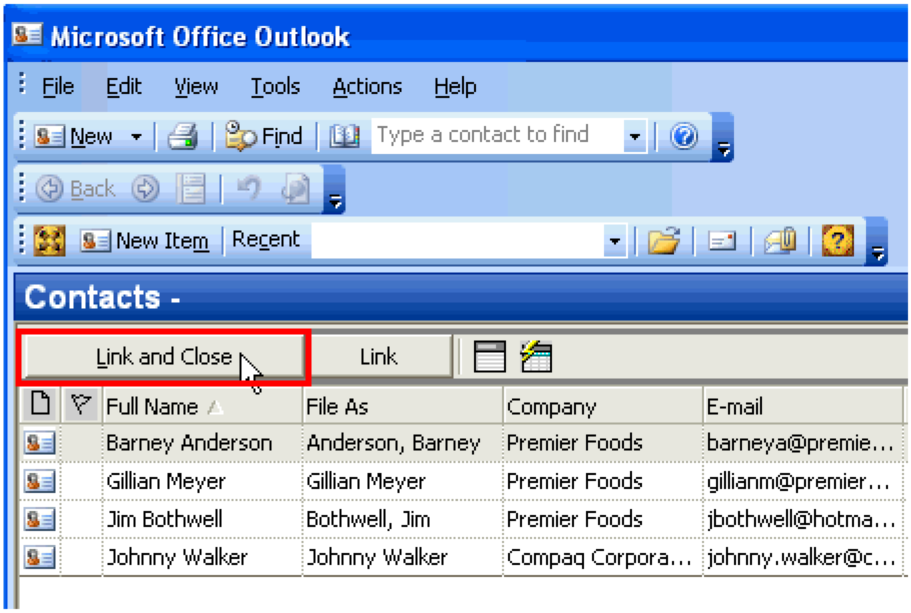
2. Open the Contact **Gillian Meyer**.
3. Click on the **Contacts** Tab.
4. Click on **New (Contact) Association:**



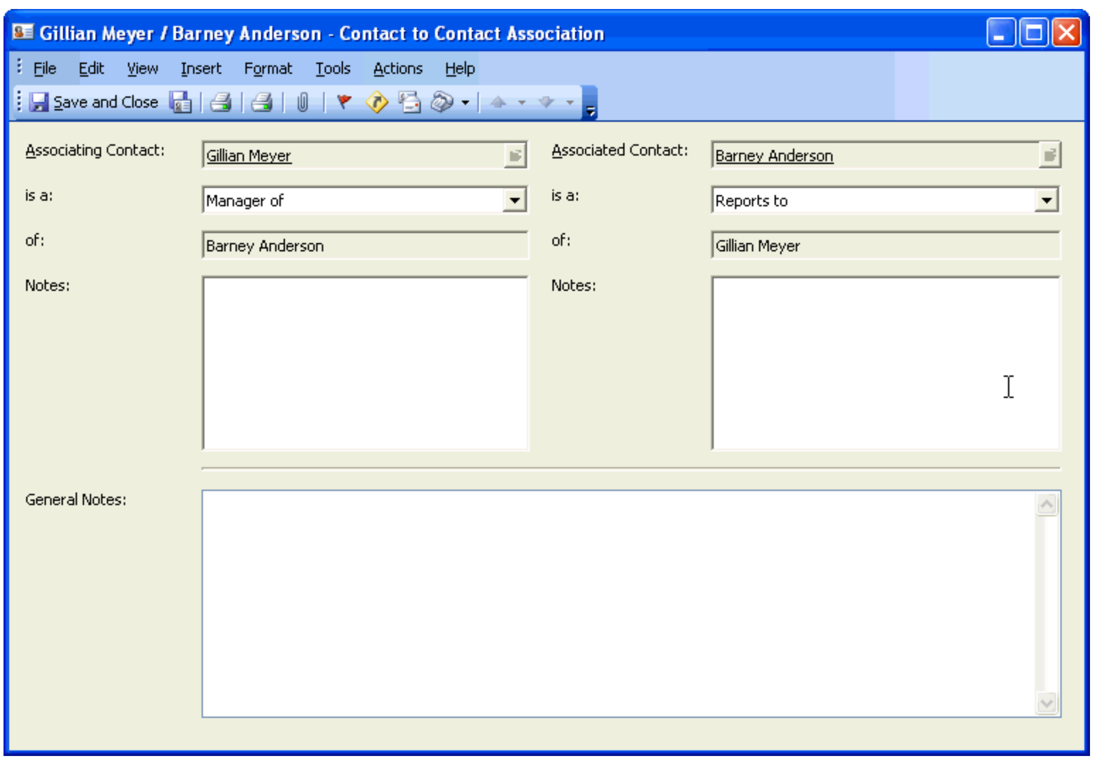
5. An Association Form will open. Click on the **(Associated Contacts) Search** button on the Association Form:



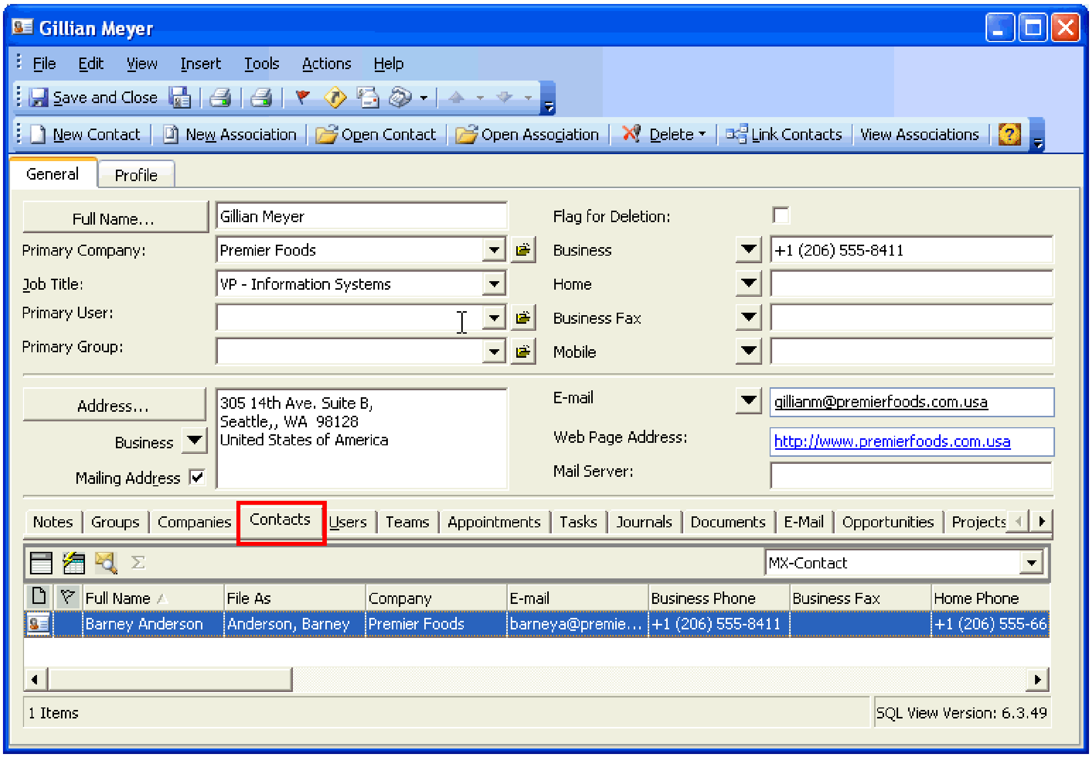
6. A **Contacts** Search Window will open: Highlight **Barney Anderson**:



7. Click **Link and Close.**
8. Enter the Association details:



9. Click **Save and Close** on the Association Form. You should now see **Barney** linked to **Gillian** in the **Contacts** Tab:



10. Click **Save and Close** on the Contact Form

Take me back to the Exercise (Associating a Contact to another Contact : Exercise)

Take me to the next Exercise (Associating a Company to another Company : Exercise)

2.19 Associating a Company to another Company : Exercise

Associate the company **Unlimited Technologies** to **Premier Foods** as a Supplier, with Premier being a Customer.

Associating Company:	**Premier Foods**
Relationship:	**Customer**
Associated Company:	**Unlimited Technologies**
Relationship:	**Supplier**

Show me the **Solution** (Associating a Company to another Company : Solution)

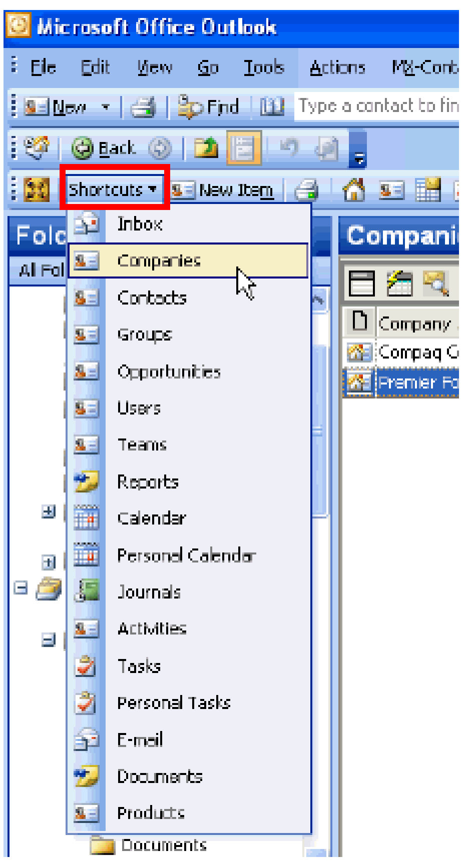
2.20 Associating a Company to another Company : Solution

Associate the company **Unlimited Technologies** to **Premier Foods** as a Supplier, with Premier being a Customer.

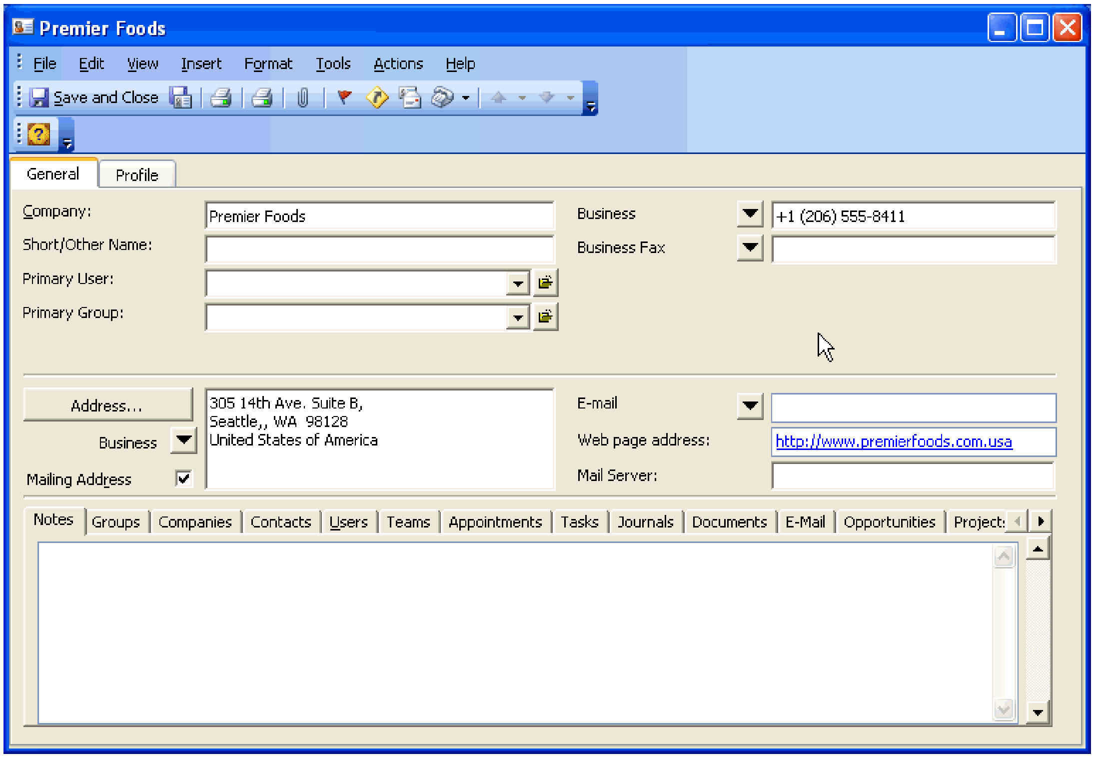
Associating Company:	**Premier Foods**
Relationship:	**Customer**
Associated Company:	**Unlimited Technologies**
Relationship:	**Supplier**

Basic Steps:

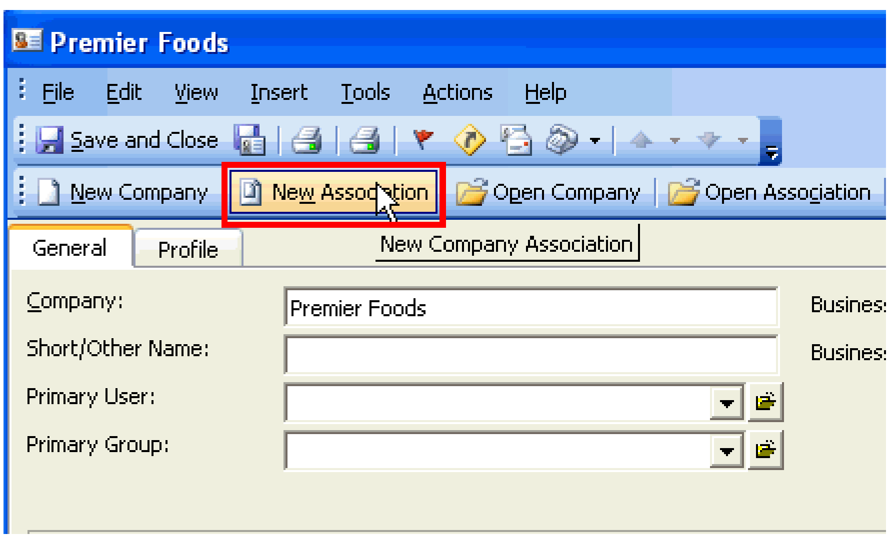
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



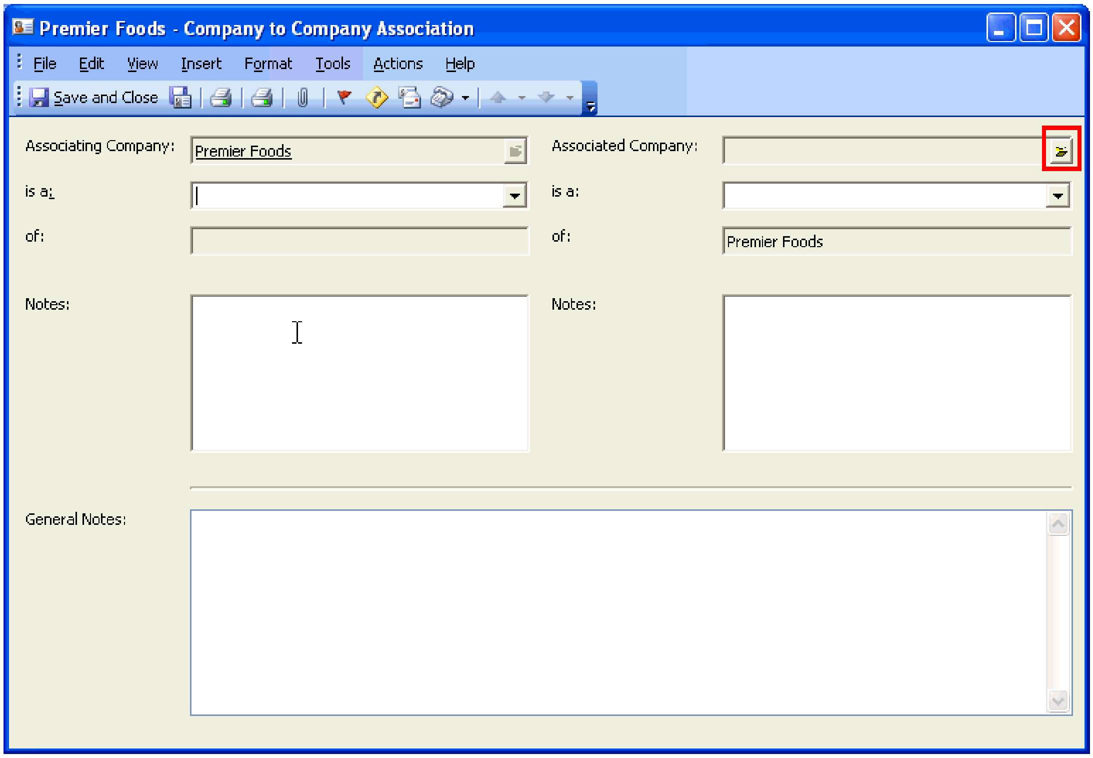
2. Double click on **Premier Foods** to open the record.
3. Click on the **Companies** Tab:



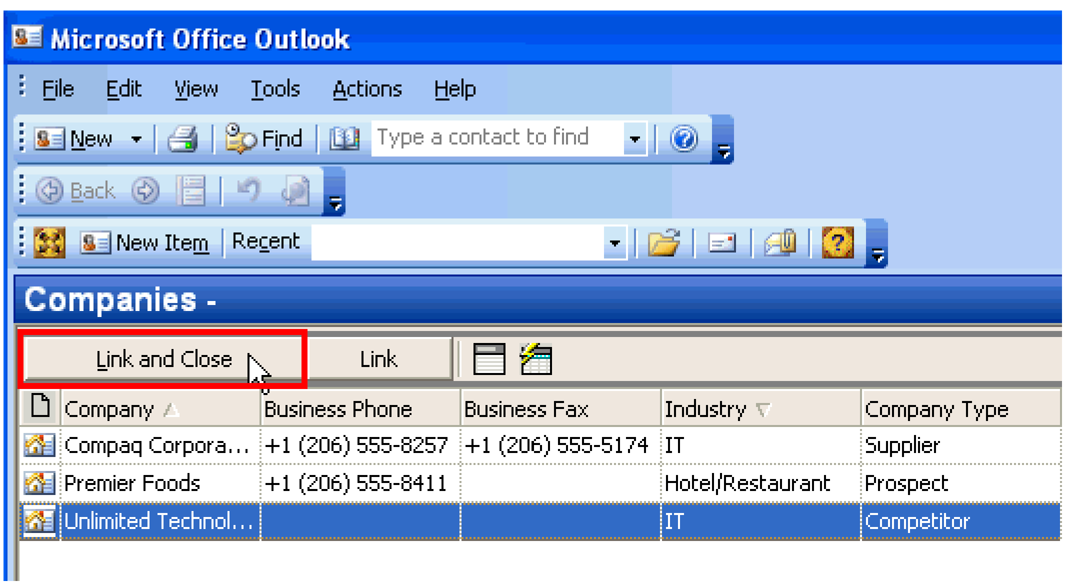
4. Click on **New (Company) Association**:



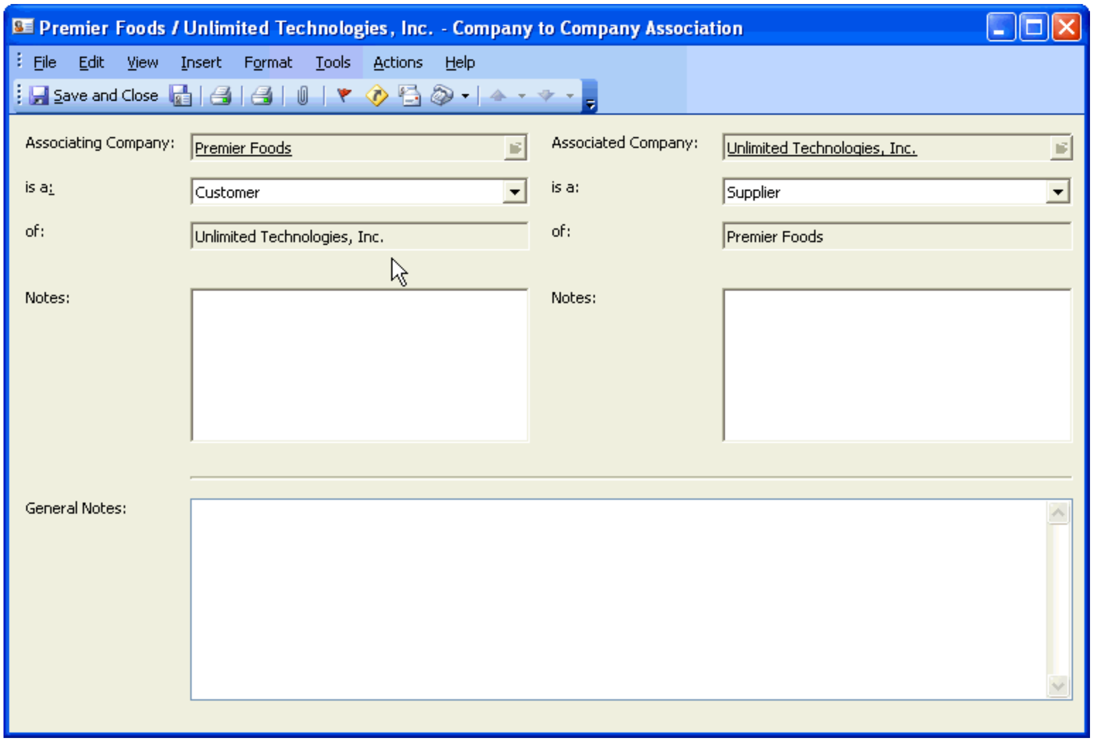
5. A new Company to Company Association Form will open. Click on the **(Associated Companies) Search** button on the Association Form:



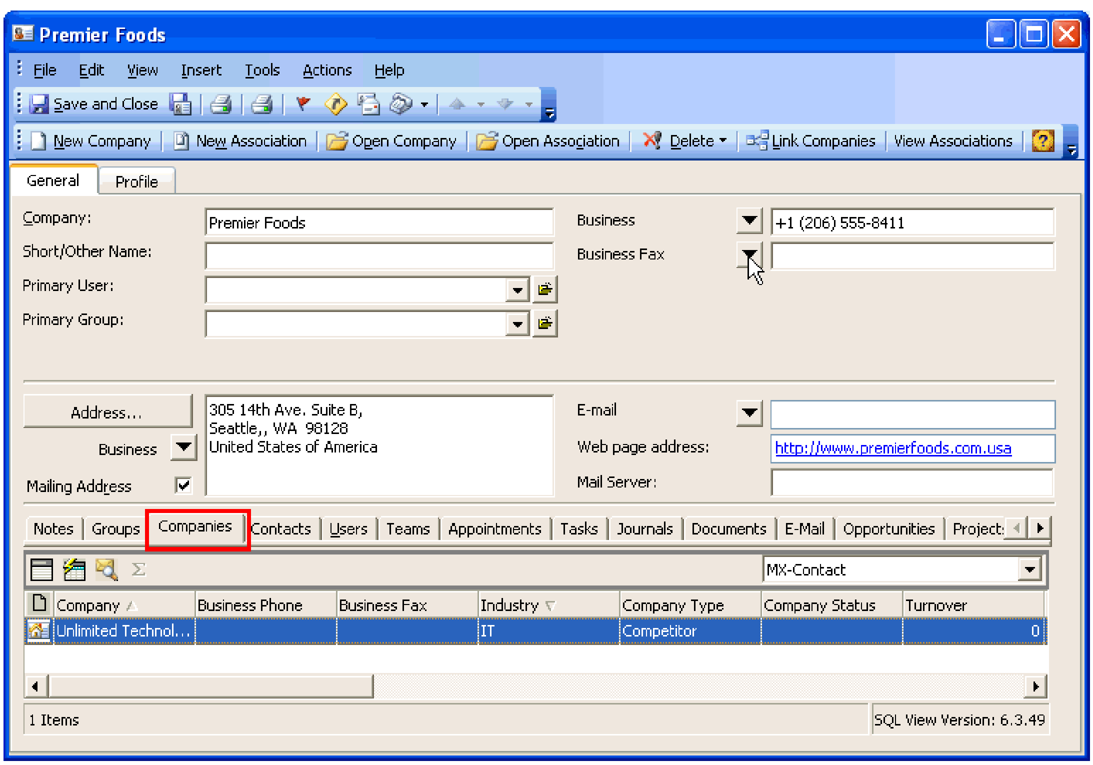
6. A **Companies** Search Window will open. Highlight **Unlimited Technologies**:



7. Click **Link and Close.**
8. Enter the Association details**:**



9. Click **Save and Close** on the Association Form. You should now see **Unlimited** linked to **Premier Foods**:



10. Click **Save and Close** on the Company Form

Take me back to the Exercise (Associating a Company to another Company : Exercise)

Take me to the next Section (Tutorial Exercises - Interactions)

3 Tutorial Exercises - Interactions

In this section you will perform the following exercises:

1. Create an appointment for a Contact/Company

   Adding an Appointment for a Contact/Company: Exercise

2. Complete an Appointment

   Linking a Journal Entry to an Appointment : Exercise

3. Create a Task for a Contact/Company

   Creating a Task for a Contact : Exercise

4. Attach a Document to a Company

   Adding a Document as an Attachment to a Company : Exercise

5. Create a Document for a Company

   Creating a Document from a Template : Exercise

6. Complete a Task and create a Journal Entry

   Completing a Task and Linking a Journal : Exercise

7. Send an E-Mail

   Sending an E-Mail : Exercise

8. Add a Journal Entry to record a phone call

   Adding a Journal to a Contact Record : Exercise

9. Create a Contact from an incoming E-Mail

   Creating a Contact from an Incoming E-Mail : Exercise

10. Link an incoming E-Mail

    Linking an Incoming E-Mail : Exercise

Now that you have some basic data and transactions in your system, you can learn how to retrieve information from your database using **Reports**

Tutorial Exercises - Reports

3.1 Adding an Appointment for a Contact/Company: Exercise

You have scheduled to meet with a potential client, Barney Anderson of Premier Foods, to discuss their hardware requirements. Barney has set the appointment for the following Tuesday at 10:00 a.m. for an hour.

Record this appointment against Barney's contact record.

Subject:	**Discuss hardware requirements with Barney**
Location:	**Their offices**
Date:	**The following Tuesday**
Time:	**10:00 am - 11:00 am**
Regarding:	**Discuss Requirements**
Category:	**Sales - Prospect**

Show me the **Solution** (Adding an Appointment for a Contact/Company : Solution)

3.2 Adding an Appointment for a Contact/Company : Solution

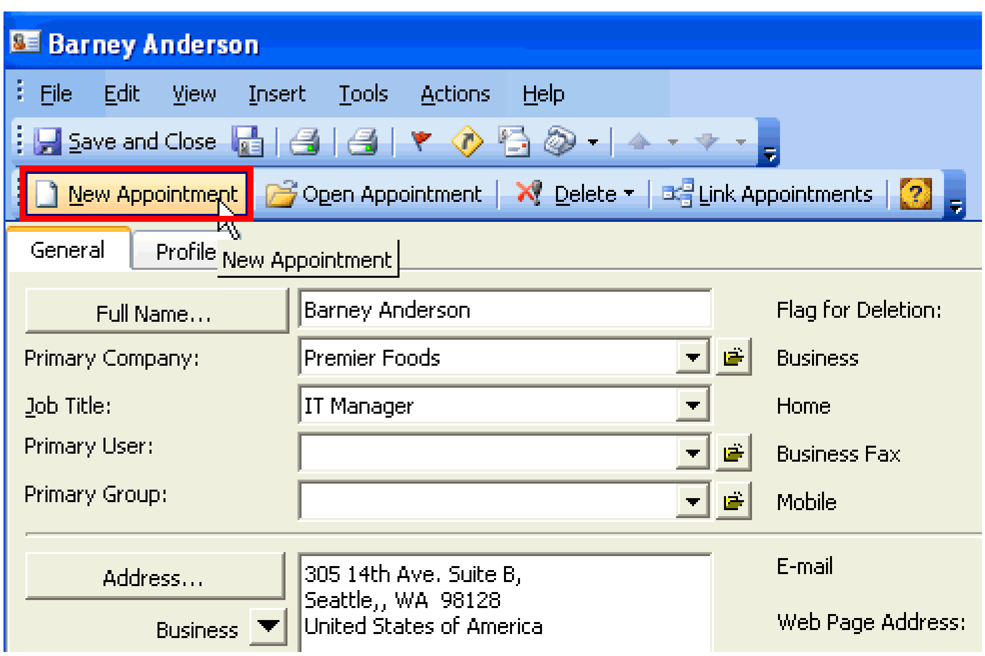
You have scheduled to meet with a potential client, Barney Anderson of Premier Foods, to discuss their hardware requirements. Barney has set the appointment for the following Tuesday at 10:00 a.m. for an hour.

Record this appointment against Barney's contact record.

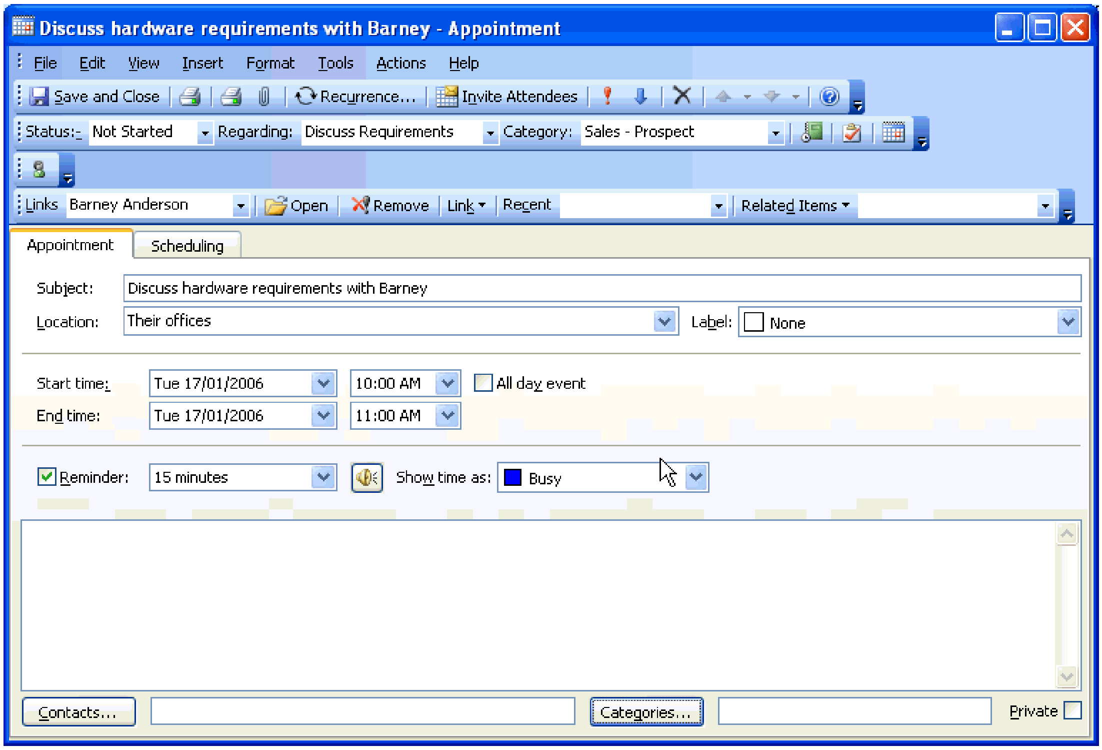
Subject:	**Discuss hardware requirements with Barney**
Location:	**Their offices**
Date:	**The following Tuesday**
Time:	**10:00 am - 11:00 am**
Regarding:	**Discuss Requirements**
Category:	**Sales - Prospect**

Basic Steps:

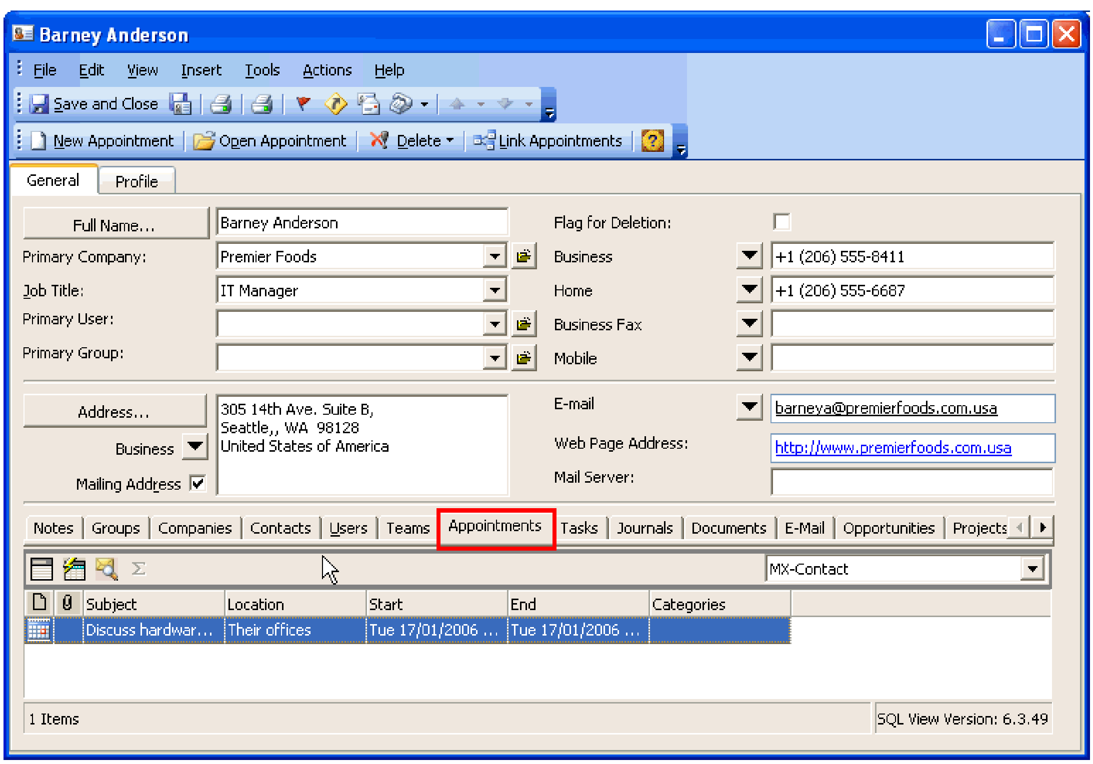
1. Open the Contact **Barney Anderson.**
2. Click on the **Appointments** Tab.
3. Click on **New Appointment**:



4. Enter the Appointment Details:



5. Click **Save and Close** on the Appointment. You should see the appointment displayed in the **Appointments** Tab:



6. Click **Save and Close** on the Contact.

Take me back to the Exercise (Adding an Appointment for a Contact/Company: Exercise)

Take me to the next Exercise (Linking a Journal Entry to an Appointment : Exercise)

3.3 Linking a Journal Entry to an Appointment : Exercise

You have met with Barney Anderson as scheduled and now want to record the details of the visit. Journal Entries are used in MX-Contact to record these types of interactions with customers such as meetings, phone calls, etc.

Complete the following information on the **Journal**:

Subject:	**Discuss hardware requirements with Barney**
Entry Type:	**Meeting**
Memo:	**Discussed their overall infrastructure and likely purchases over the next few months. They are buying from Unlimited Technologies but are unhappy with the service. Want us to give them a proposal.**
Regarding:	**Discuss Requirements**
Category:	**Sales - Prospect**

Show me the **Solution** (Linking a Journal Entry to an Appointment: Solution)

3.4 Linking a Journal Entry to an Appointment: Solution

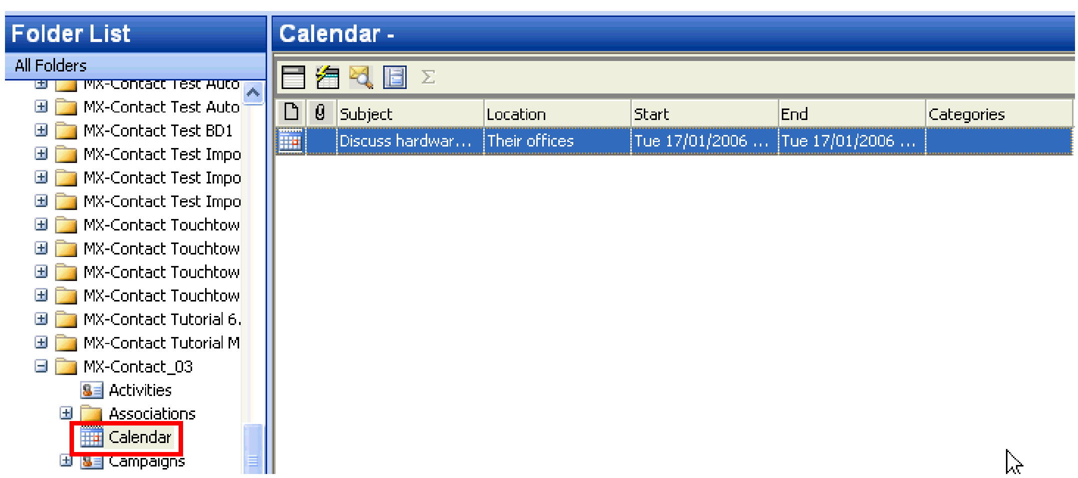
You have met with Barney Anderson as scheduled and now want to record the details of the visit. Journal Entries are used in MX-Contact to record these types of interactions with customers such as meetings, phone calls, etc.

Complete the following information on the **Journal**:

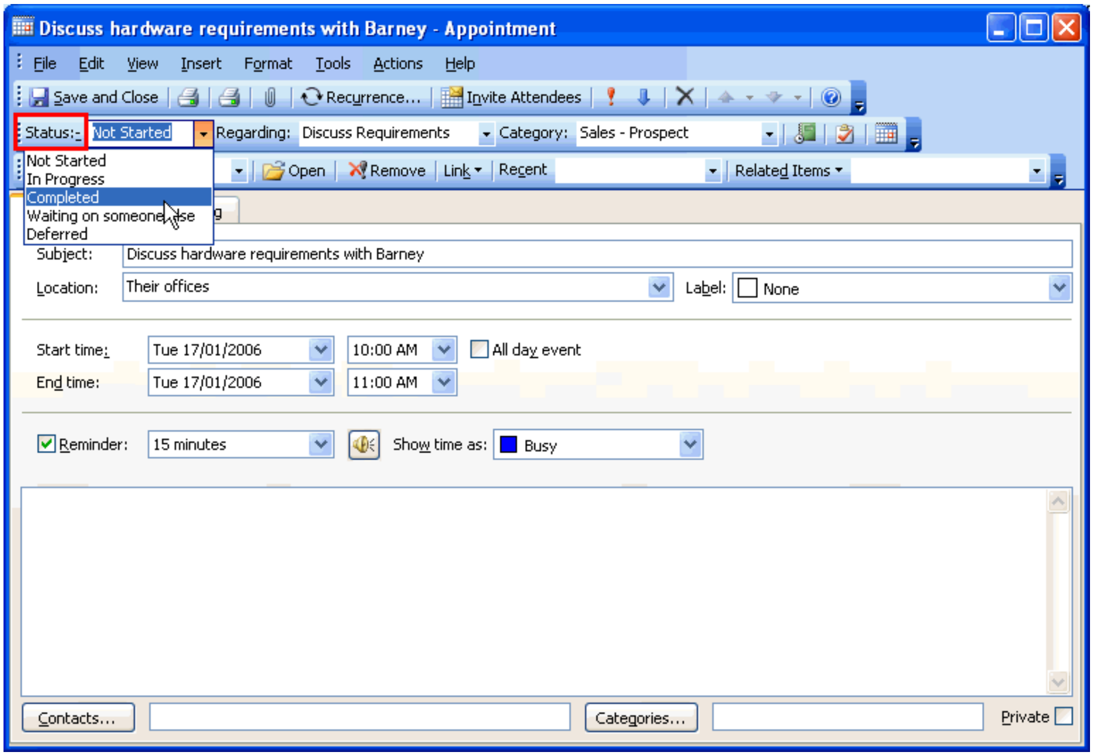
Subject:	**Discuss hardware requirements with Barney**
Entry Type:	**Meeting**
Memo:	**Discussed their overall infrastructure and likely purchases over the next few months. They are buying from Unlimited Technologies but are unhappy with the service. Want us to give them a proposal.**
Regarding:	**Discuss Requirements**
Category:	**Sales - Prospect**

Basic Steps:

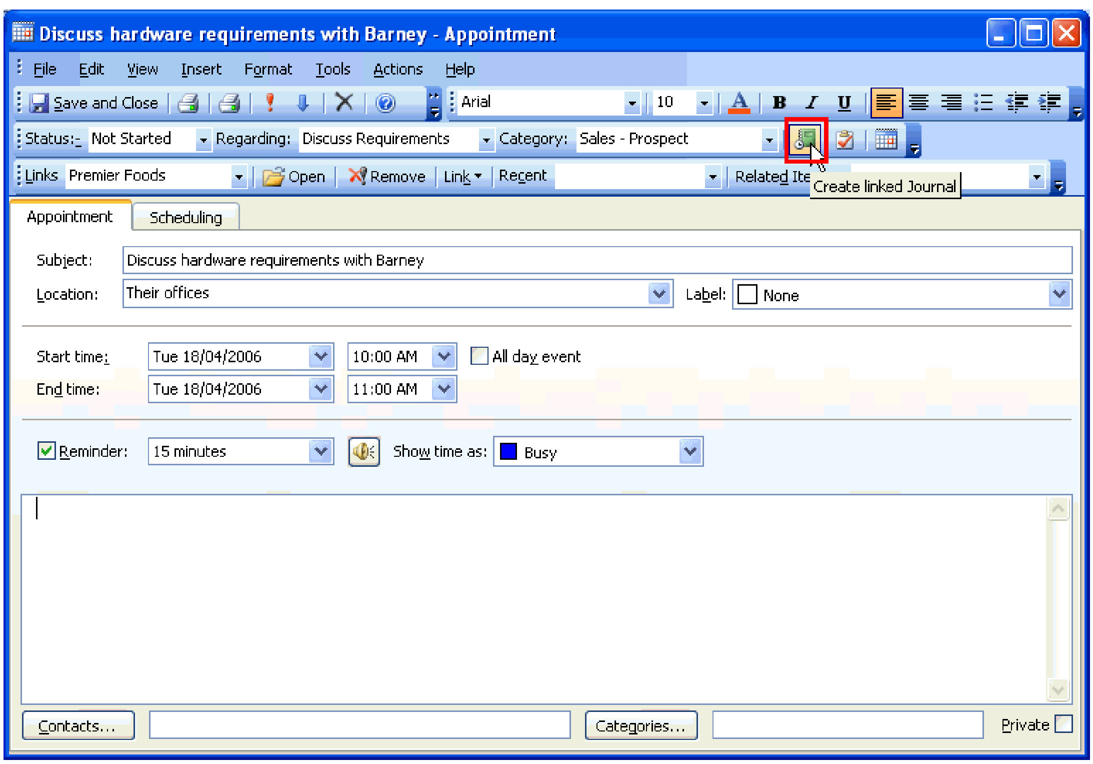
1. Open the Meeting in your Calendar:



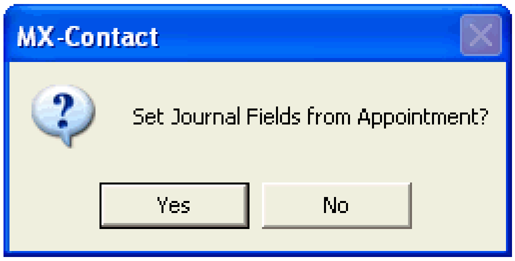
2. Change the **Status** to **Completed:**



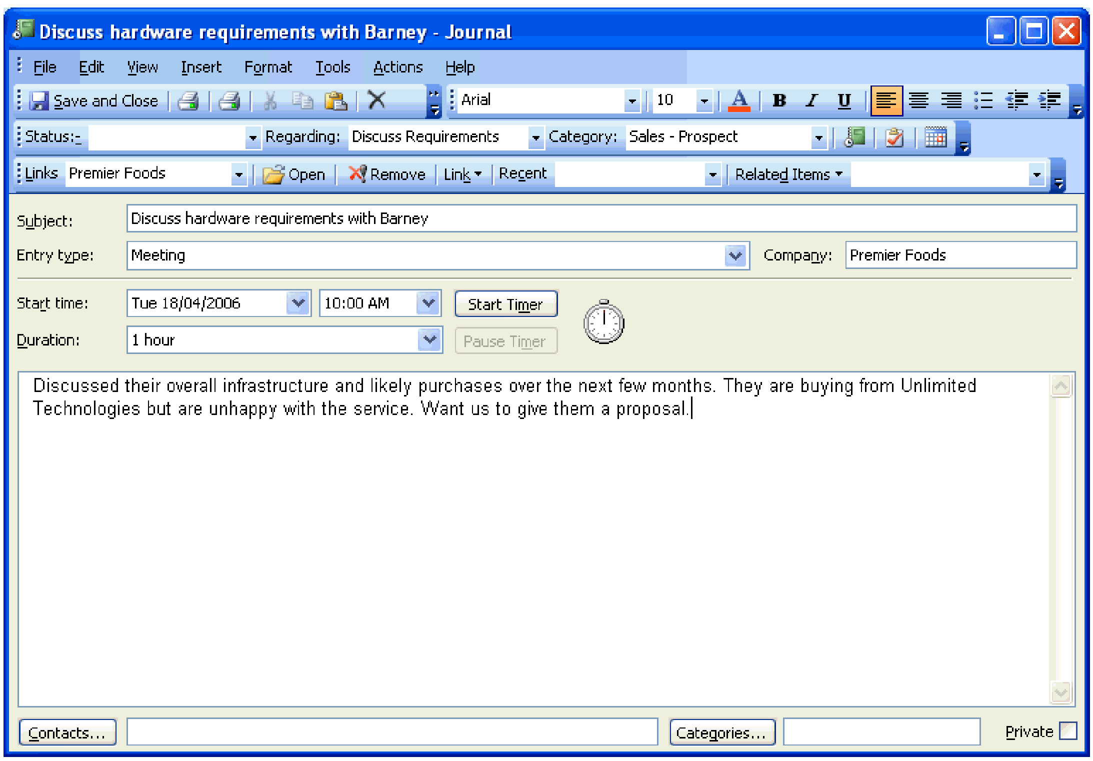
3. Click on the Create Linked Journal button.



4. The following prompt will appear:



5. Click on Yes.
6. A Journal Entry Form will open. The Journal fields will be set from the relevant appointment fields.
7. Enter the details of the meeting on the **Journal**:



8. Click **Save and Close** on the Journal Form.
9. Click Save and Close on the Appointment Form.

Take me back to the Exercise (Linking a Journal Entry to an Appointment : Exercise)

Take me to the next Exercise (Creating a Task for a Contact : Exercise)

3.5 Creating a Task for a Contact : Exercise

Create a Task to remind yourself to fax a proposal to **Barney Anderson** of **Premier Foods**.

Complete the following information on the Task:

Subject:	**Fax proposal to Barney**
Due Date:	**The following Thursday**
Regarding:	**Present/Review Proposal**
Category:	**Sales – Prospect**

Show me the **Solution** (Creating a Task for a Contact : Solution)

3.6 Creating a Task for a Contact : Solution

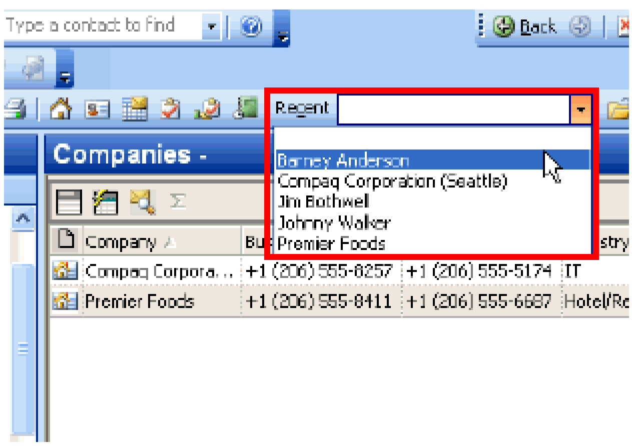
Create a Task to remind yourself to fax a proposal to **Barney Anderson** of **Premier Foods**.

Complete the following information on the Task:

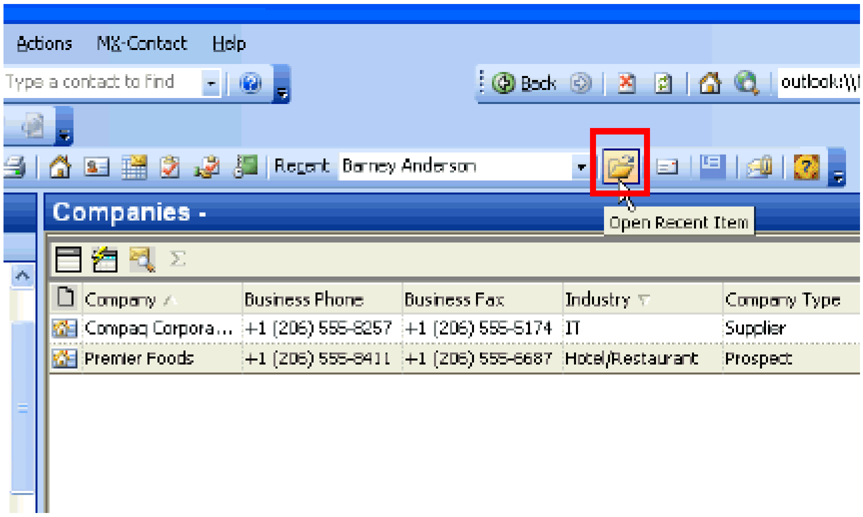
Subject:	**Fax proposal to Barney**
Due Date:	**The following Thursday**
Regarding:	**Present/Review Proposal**
Category:	**Sales – Prospect**

Basic Steps:

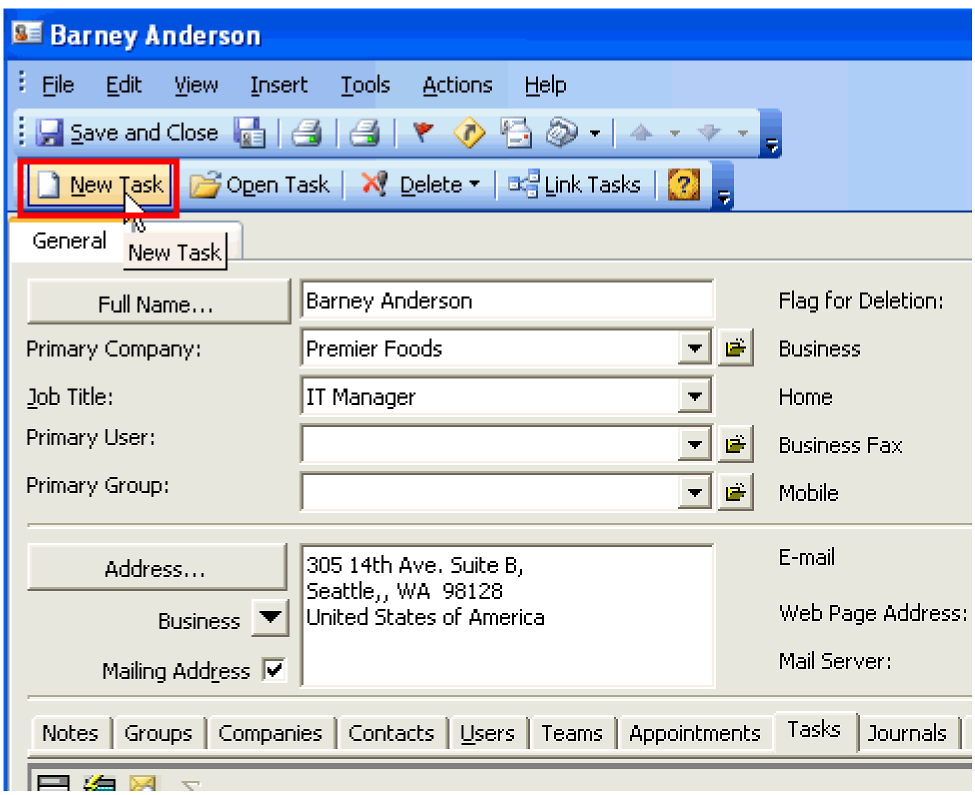
1. Open the contact **Barney Anderson** (try this from Recent Items). Click on the Recent Items drop down list and select **Barney Anderson**.



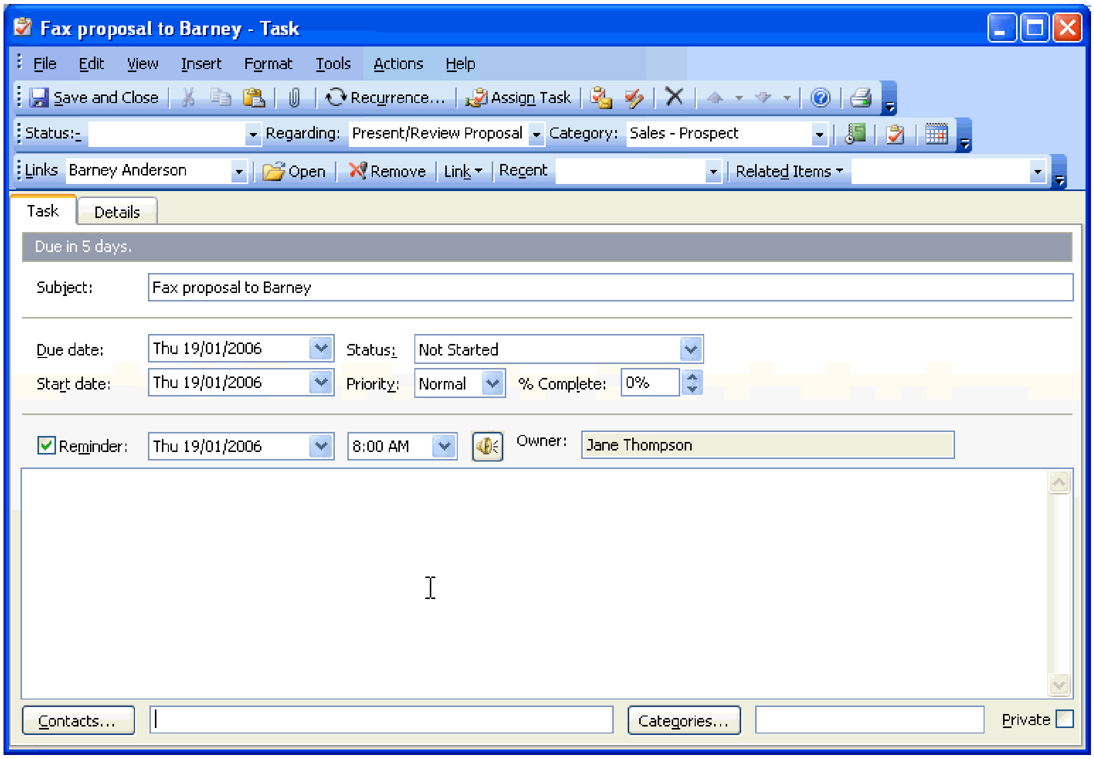
2. Click on the **Open Recent Item** button.



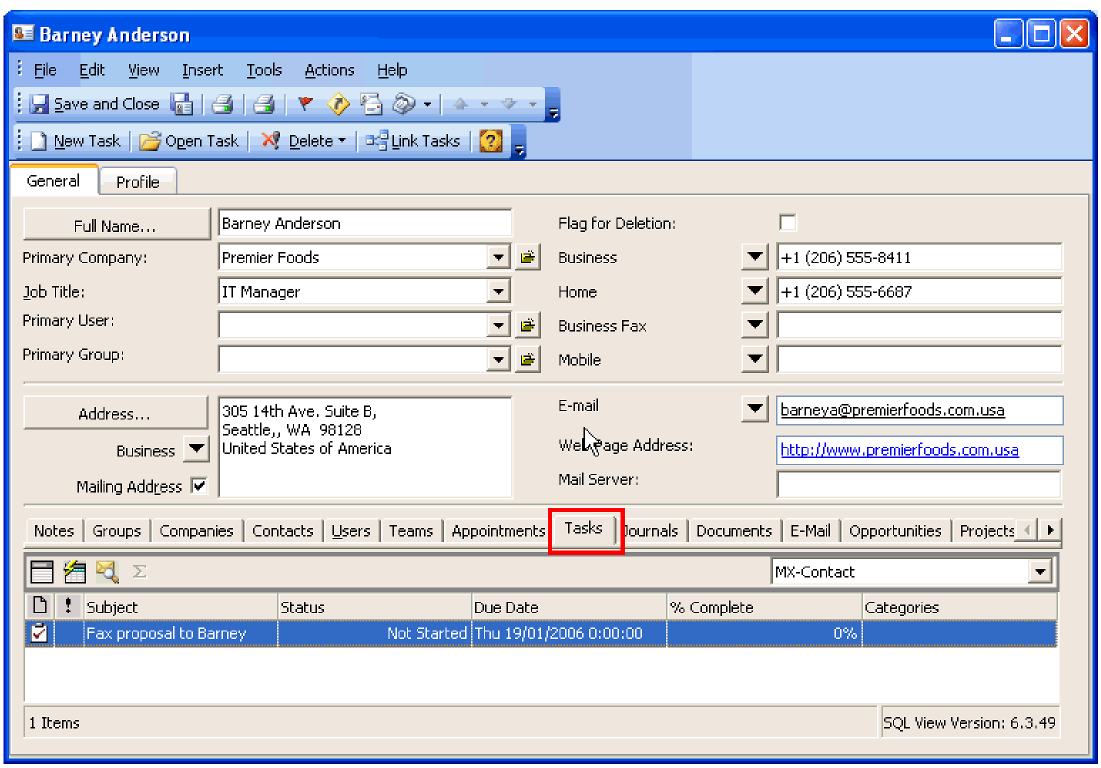
3. Once the Contact form has opened, click on the **Tasks** Tab.
4. Click on **New Task**.



5. Enter the Task Details:



6. Click **Save and Close** on the Task. You should see the task displayed in the **Tasks** Tab:



7. Click **Save and Close** on the Contact

Take me back to the Exercise (Creating a Task for a Contact : Exercise)

Take me to the next Exercise (Adding a Document as an Attachment to a Company : Exercise)

3.7 Adding a Document as an Attachment to a Company : Exercise

You are preparing a quotation for Premier Foods. You need to do some calculations in a costing sheet in Microsoft Excel.

Open Excel. Create an Excel spreadsheet called **Premier Foods Costing.xls** (the detail in the sheet is not important) Save it to your desktop.

Attach this document to Premier Foods.

Show me the **Solution** (Add Document as Attachment to a Company : Solution)

3.8 Add Document as Attachment to a Company : Solution

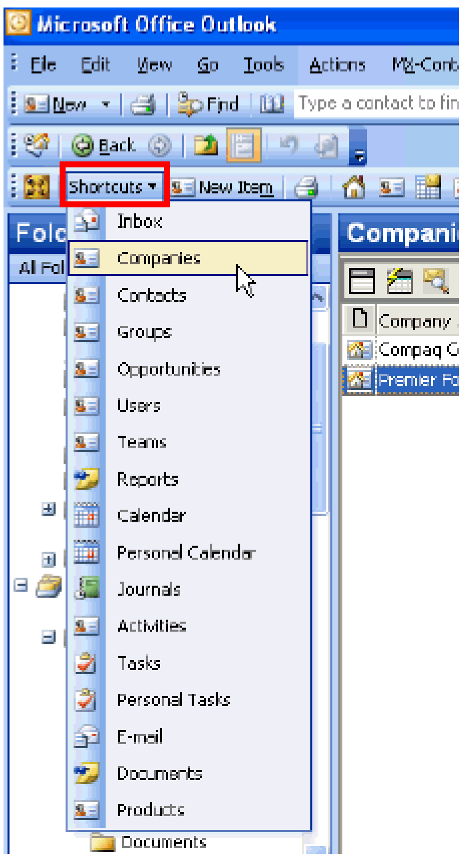
You are preparing a quotation for Premier Foods. You need to do some calculations in a costing sheet in Microsoft Excel.

Open Excel. Create an Excel spreadsheet called **Premier Foods Costing.xls** (the detail in the sheet is not important) Save it to your desktop.

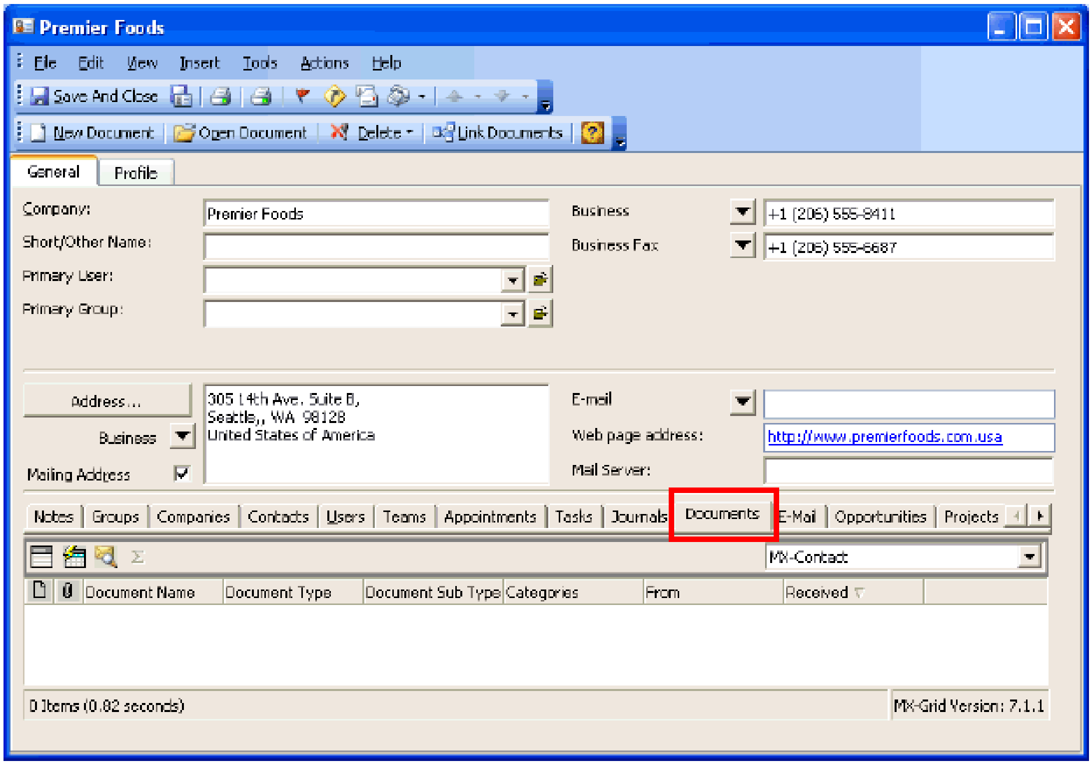
Attach this document to Premier Foods.

Basic Steps:

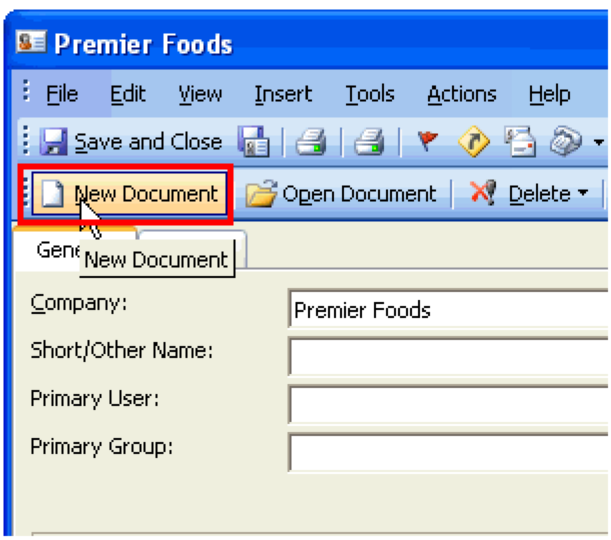
1. Create the spreadsheet file **Premier Foods Costing.xls** as described above.
2. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



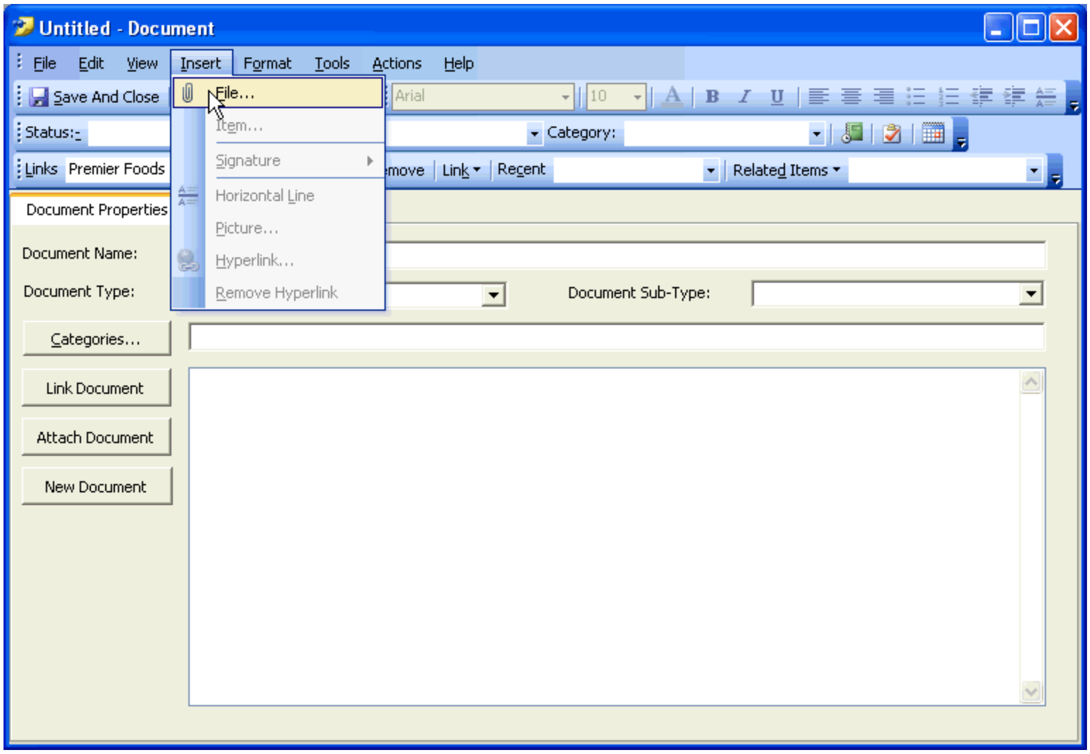
3. Open **Premier Foods**.
4. Click on the **Documents** Tab**:**



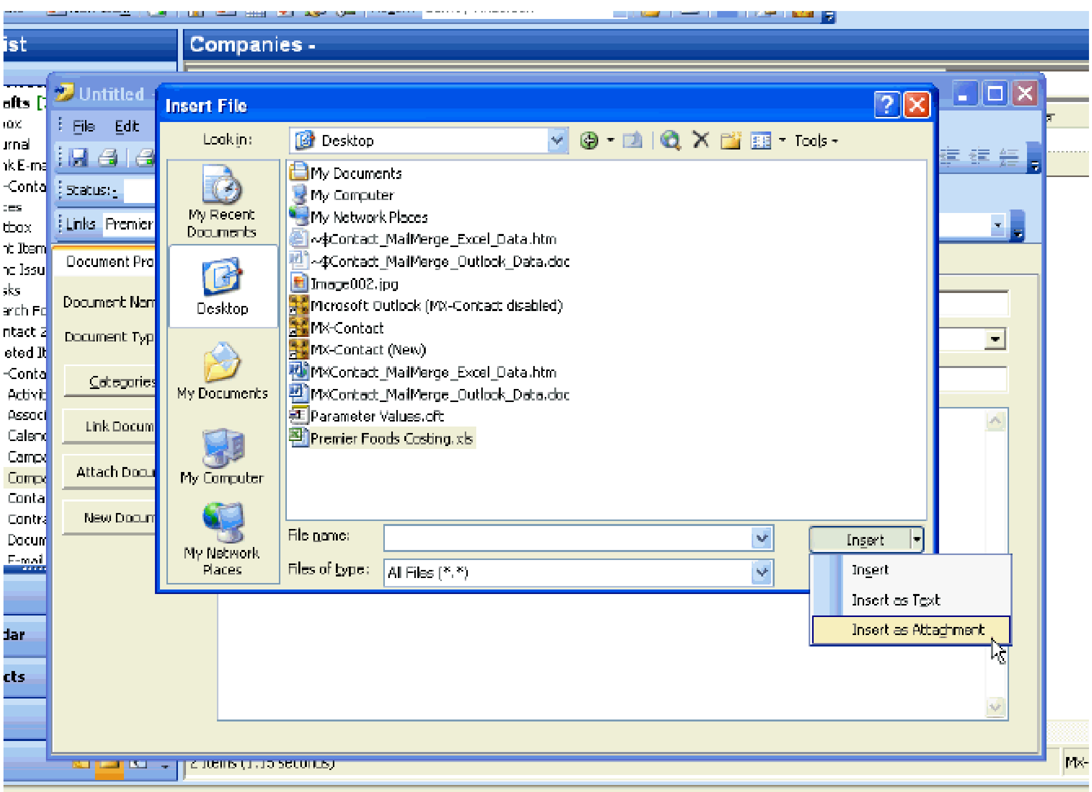
5. Click on **New Document:**



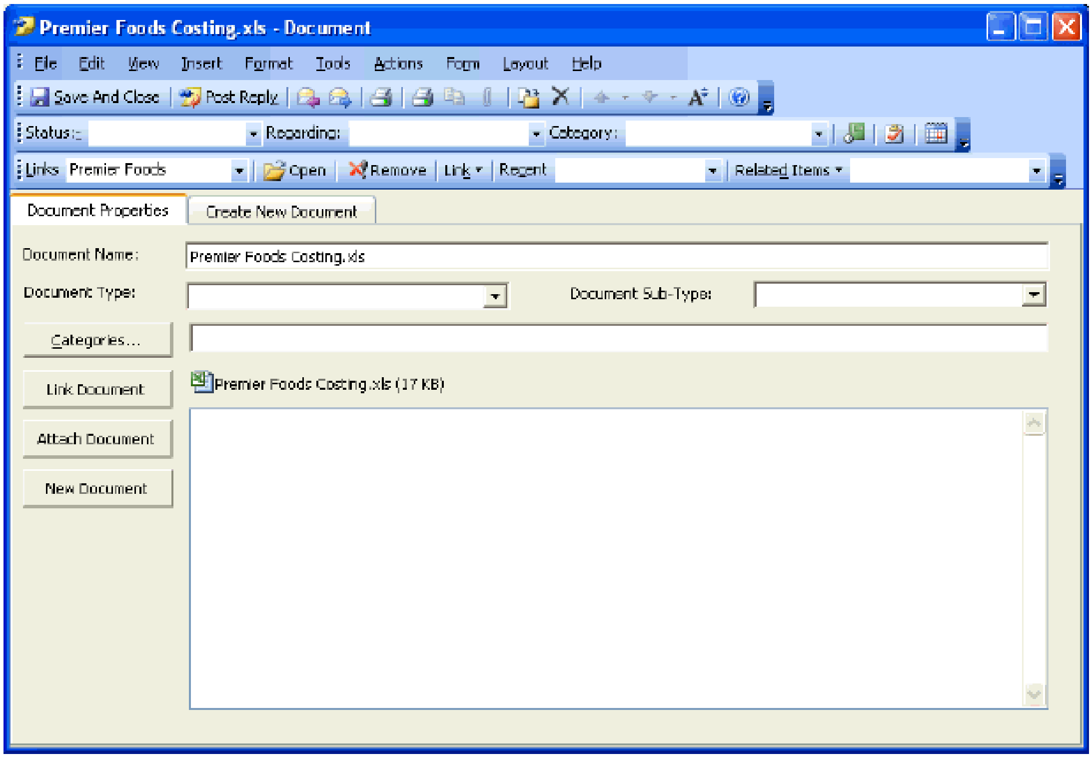
6. Click on **Insert File**:



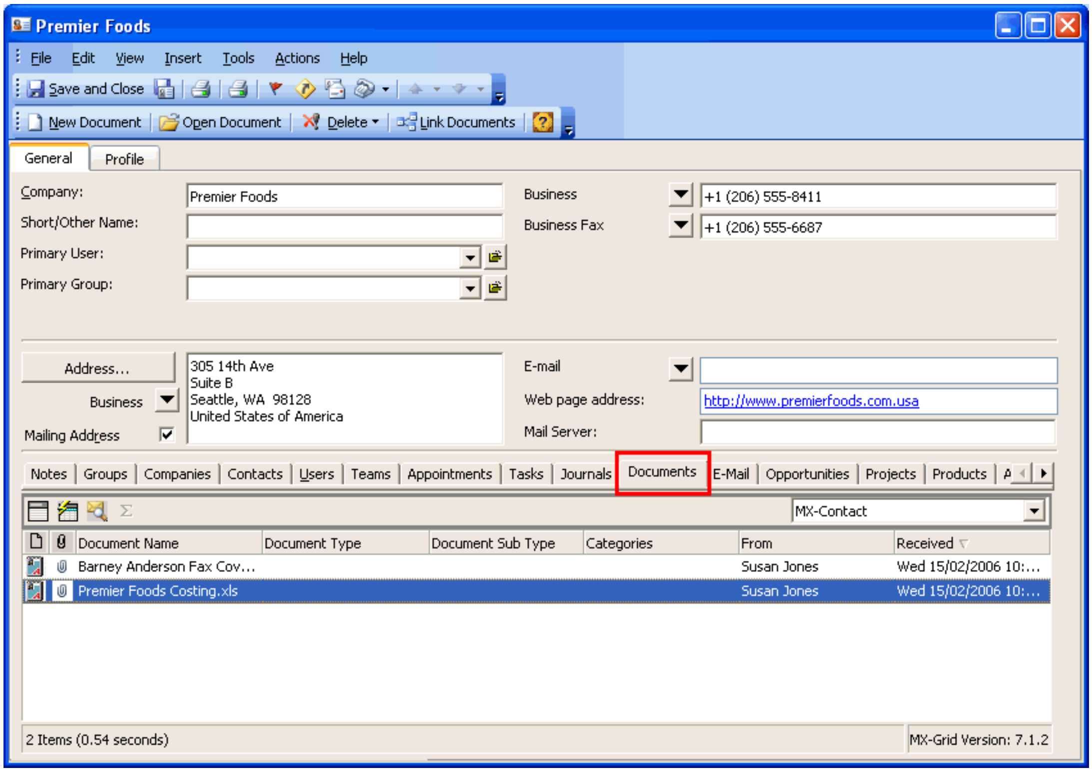
7. Navigate to the file your desktop.



8. Click on the drop down list on **Insert** and select **Insert as Attachment.**
9. The spreadsheet file will be attached to the **Document** item.



10. Click **Save and Close** on the **Document** Form.
11. You should now see the document displayed in the **Documents** Tab:



12. Click **Save and Close** on the Company Form.

Take me back to the Exercise (Adding a Document as an Attachment to a Company : Exercise)

Take me to the next Exercise (Creating a Document from a Template : Exercise)

3.9 Creating a Document from a Template : Exercise

You have prepared a proposal for Barney and want to generate a Fax Cover Sheet for this proposal.

Create a Fax Cover sheet for Barney using the following defaults:

Templates Location:	**Outlook/Exchange Folder**
Templates Folder:	**Templates**
Template Name:	**Contemporary Fax Contact**
Document Name:	**Barney Anderson Fax Cover.doc**
Document Location:	**Outlook/Exchange Folder**
Document Folder:	**Blank (disabled)**
Insert as:	**Attachment**

Show me the **Solution** (Creating a Document from a Template : Solution)

3.10 Creating a Document from a Template : Solution

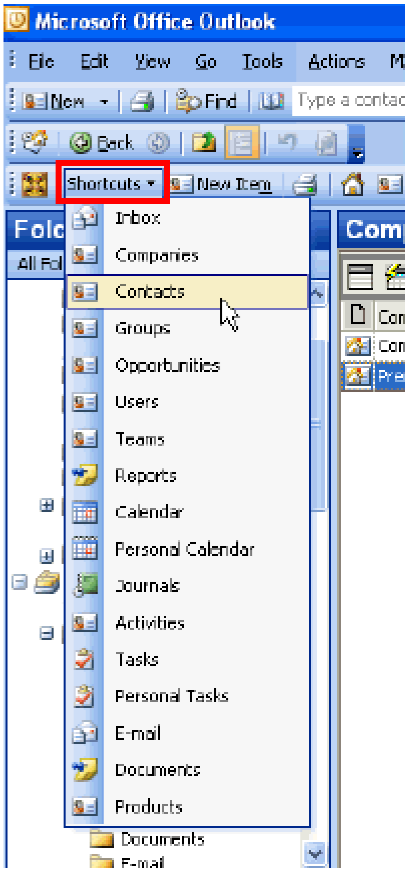
You have prepared a proposal for Barney and want to generate a Fax Cover Sheet for this proposal.

Create a Fax Cover sheet for Barney using the following defaults:

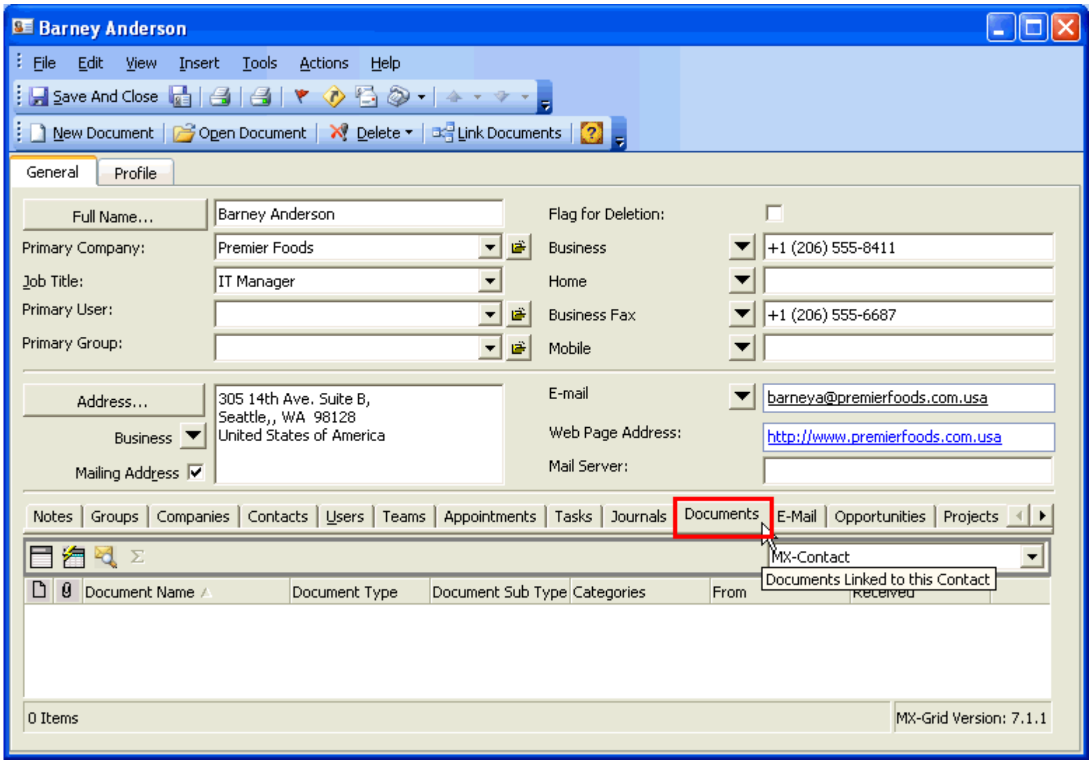
Templates Location:	**Outlook/Exchange Folder**
Templates Folder:	**Templates**
Template Name:	**Contemporary Fax Contact**
Document Name:	**Barney Anderson Fax Cover.doc**
Document Location:	**Outlook/Exchange Folder**
Document Folder:	**Blank (disabled)**
Insert as:	**Attachment**

Basic Steps:

1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:

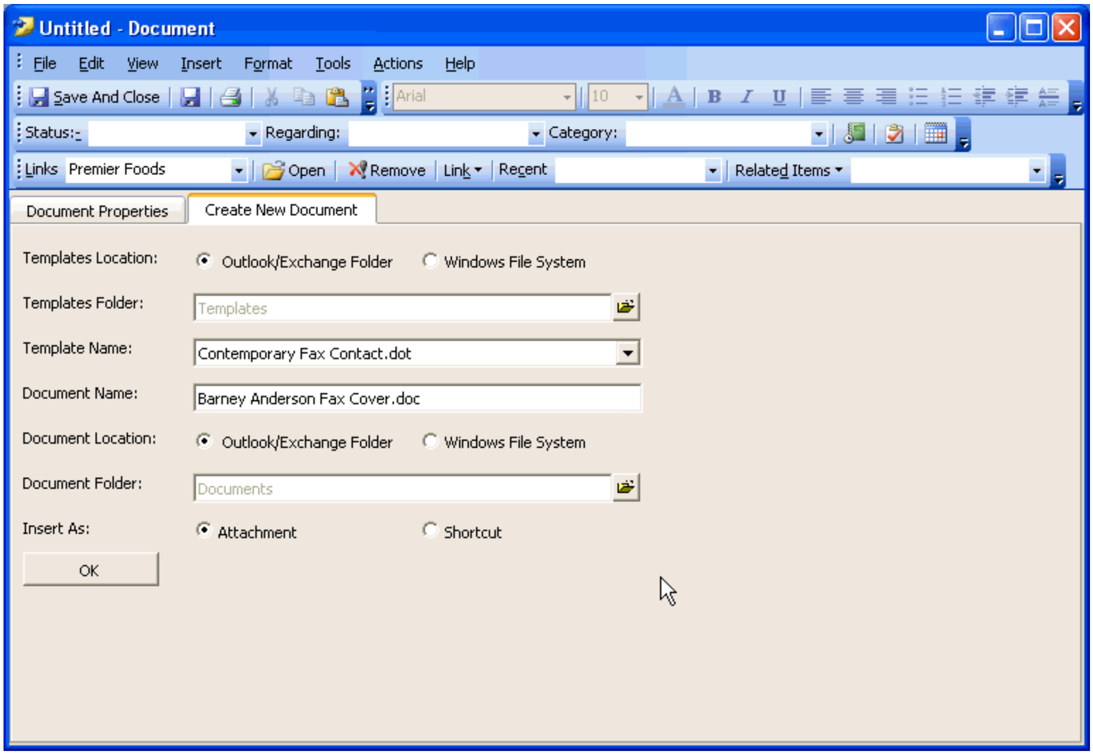


2. Open **Barney Anderson's** Contact Record.
3. Click on the **Documents** Tab**.**

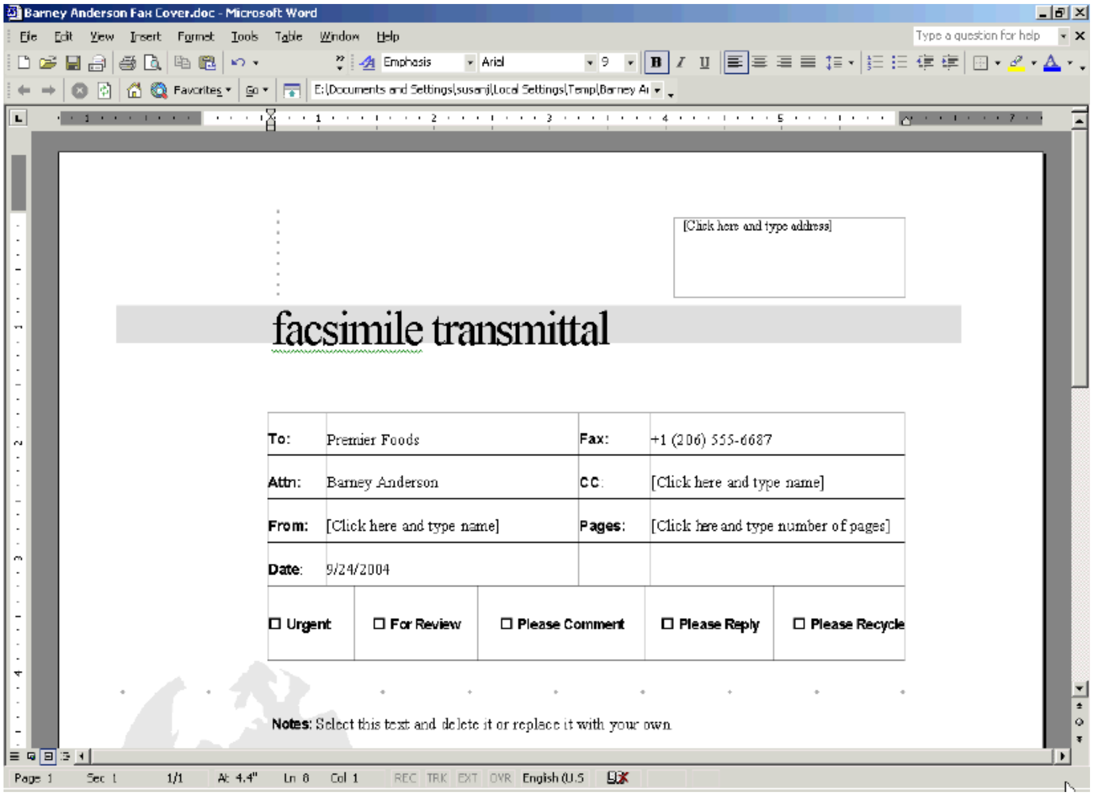


4. Click on **New Document:**

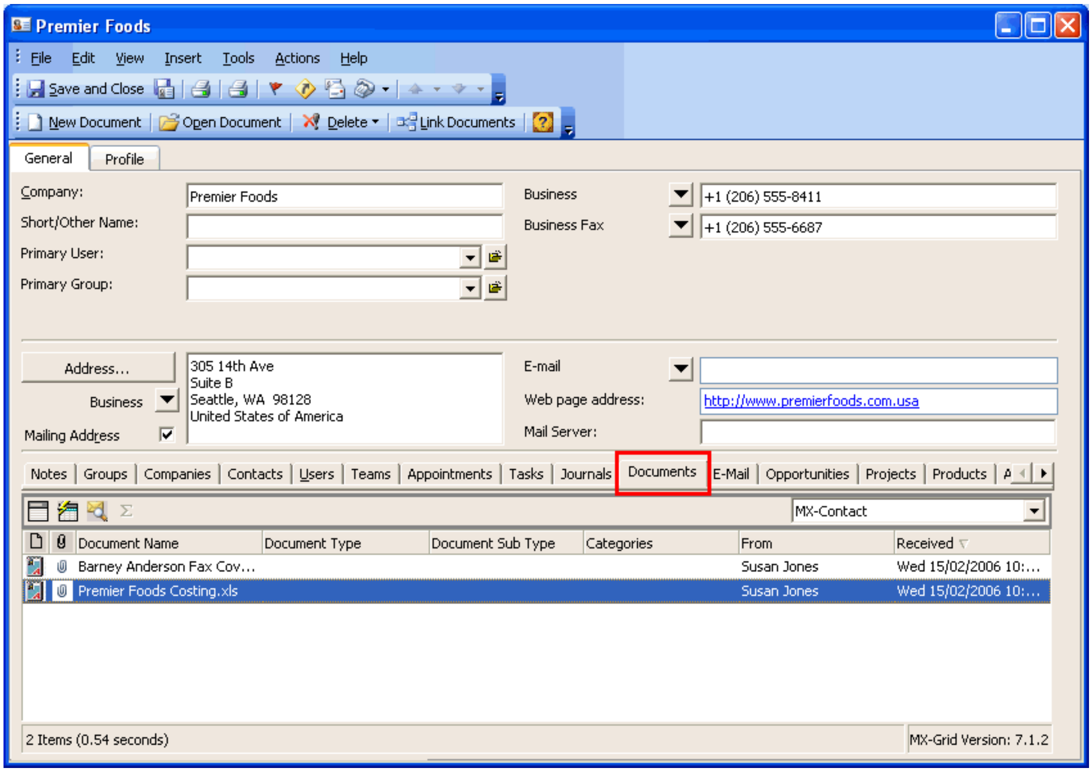
5. Click on the **Create New Document** Tab, and enter the details shown above:



6. Click **OK** on the Document Form. Microsoft Word should open with the specified template and populate the Fax Cover Sheet with the contact's details.



7. Click **File, Save** in Word and close the document.
8. **Click Save and Close** on the **Document** Form. You should see the document in the **Documents** Tab:



9. Click **Save and Close** on the Contact Form.

Take me back to the Exercise (Creating a Document from a Template : Exercise)

Take me to the next Exercise (Completing a Task and Linking a Journal : Exercise)

3.11 Completing a Task and Linking a Journal : Exercise

You have prepared the quotation for Barney Anderson and faxed it to him as promised. You therefore want to mark this Task as Complete and record the details in a Journal entry.

Complete the following information on the **Journal**:

Subject:	**Fax proposal to Barney**
Entry Type:	**Task**
Memo:	**Faxed the proposal. Offered him 15 % discount on the initial purchase.**
Regarding:	**Present/Review Proposal**
Category:	**Sales - Prospect**

Show me the **Solution** (Completing a Task and Linking a Journal: Solution)

3.12 Completing a Task and Linking a Journal: Solution

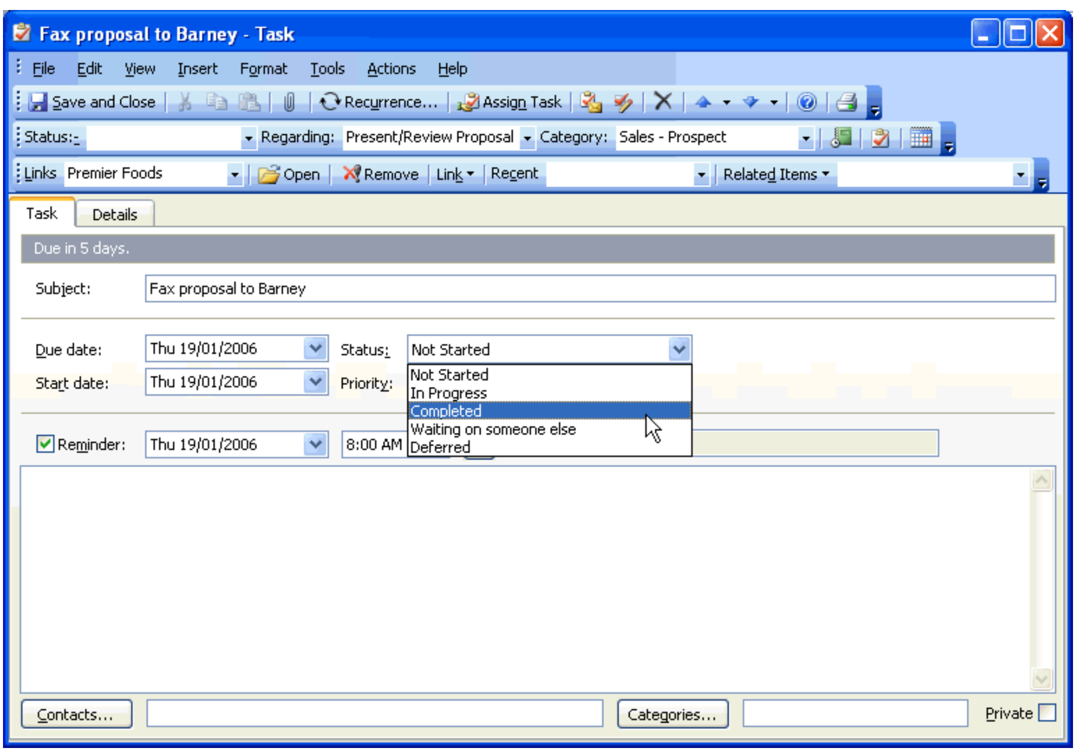
You have prepared the quotation for Barney Anderson and faxed it to him as promised. You therefore want to mark this Task as Complete and record the details in a Journal entry.

Complete the following information on the **Journal**:

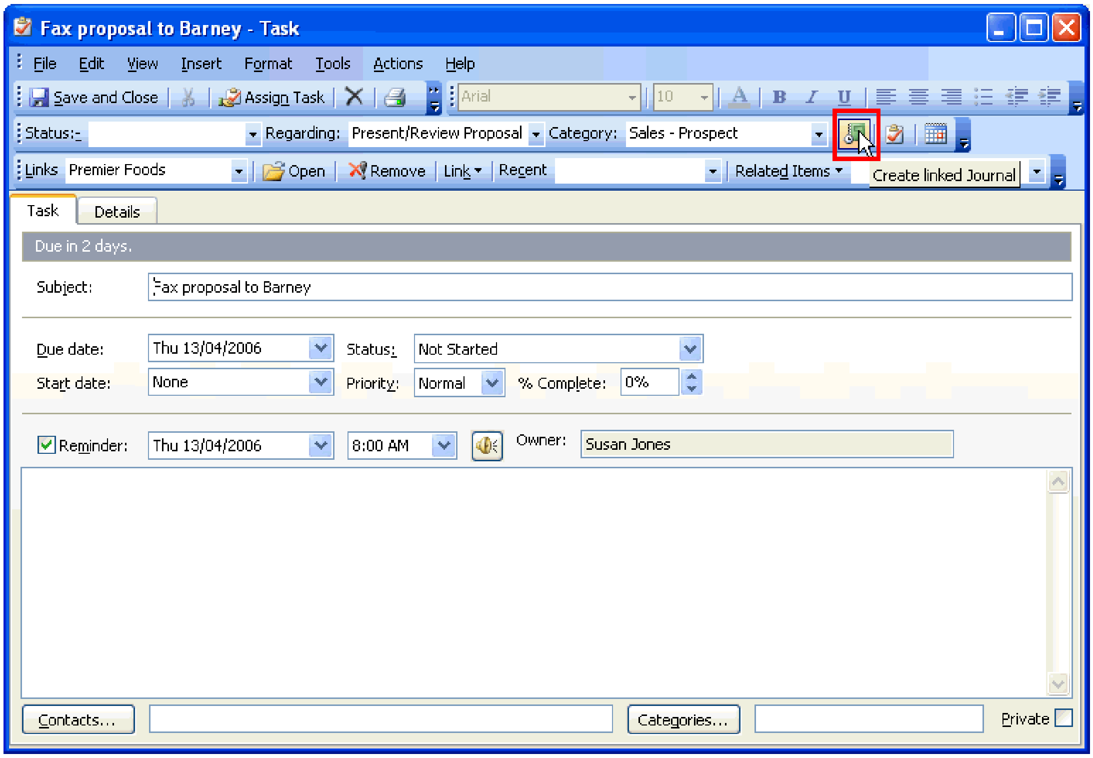
Subject:	**Fax proposal to Barney**
Entry Type:	**Task**
Memo:	**Faxed the proposal. Offered him 15 % discount on the initial purchase.**
Regarding:	**Present/Review Proposal**
Category:	**Sales - Prospect**

Basic Steps:

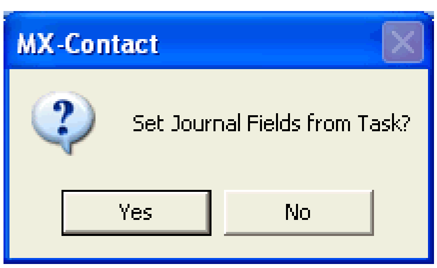
1. Click on your (Personal) **Tasks** Folder.
2. Open the **Task**:
3. Mark the **Task** as **Completed** (in the **Status** field):



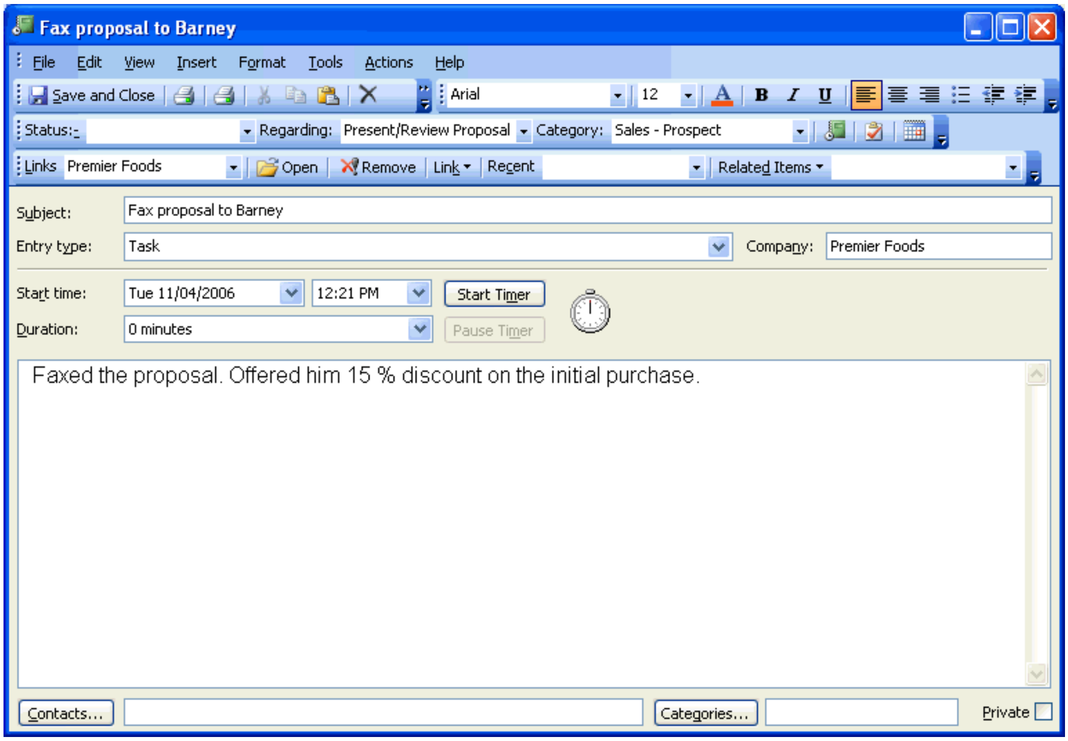
4. Click on the **Create Linked Journal** button.



5. The following prompt will appear:



6. Click Yes. A journal form will open. The journal fields will be set from the relevant fields in the Task form. Enter the details of the meeting details.



7. Click **Save and Close** on the **Journal** Form.
8. Click **Save and Close** on the **Task** form.

Take me back to the Exercise (Completing a Task and Linking a Journal : Exercise)

Take me to the next Exercise (Sending an E-Mail : Exercise)

3.13 Sending an E-Mail : Exercise

You want to send Barney Anderson a follow up e-mail regarding the proposal that you sent a few days ago.

Send an E-mail to **Barney Anderson** from his Contact Form. Include Gillian Meyer as a recipient of this e-mail by clicking inside the **Cc** field and selecting Gillian Meyer from the **Recipients** dropdown list.

To:	**barneya@premierfoods.com.usa (appears automatically)**
Cc:	**gillianm@premierfoods.com.usa (select from** Recipients **drop down list)**
Subject:	**Follow up on Proposal**
Memo:	**Hi Barney** **Just a quick note to check that you received the proposal sent a few days ago. Please feel free to contact me if you have any queries.** **Kind Regards** **Susan Jones**

Show me the **Solution** (Sending an E-Mail : Solution)

3.14 Sending an E-Mail : Solution

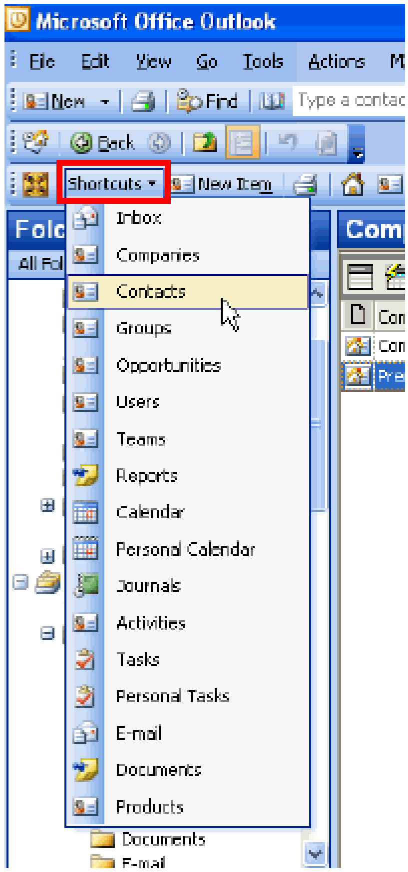
You want to send Barney Anderson a follow up e-mail regarding the proposal that you sent a few days ago.

Send an E-mail to **Barney Anderson** from his Contact Form. Include Gillian Meyer as a recipient of this e-mail by clicking inside the **Cc** field and selecting Gillian Meyer from the **Recipients** dropdown list.

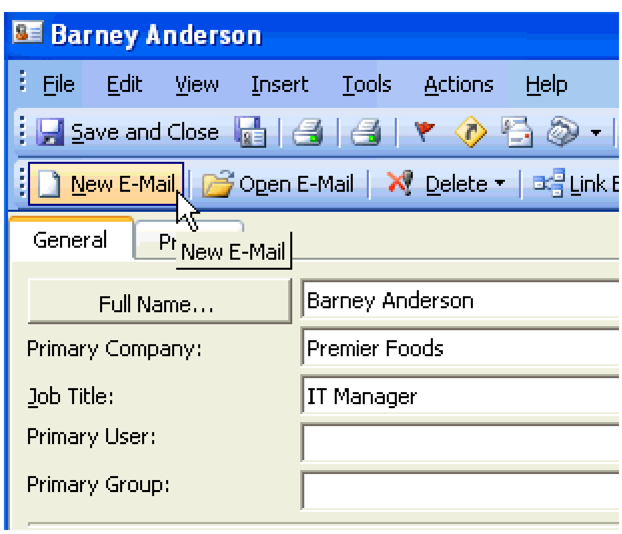
To:	**barneya@premierfoods.com.usa (appears automatically)**
Cc:	**gillianm@premierfoods.com.usa (select from** Recipients **drop down list)**
Subject:	**Follow up on Proposal**
Memo:	**Hi Barney** **Just a quick note to check that you received the proposal sent a few days ago. Please feel free to contact me if you have any queries.** **Kind Regards** **Susan Jones**

Basic Steps:

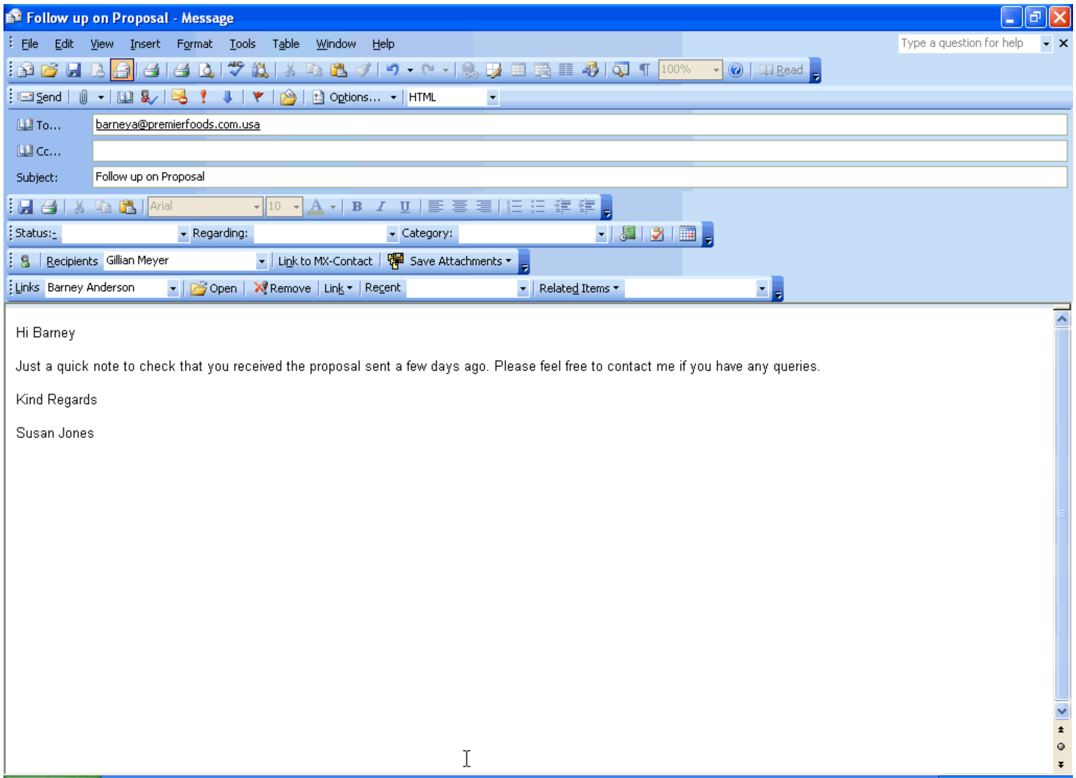
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



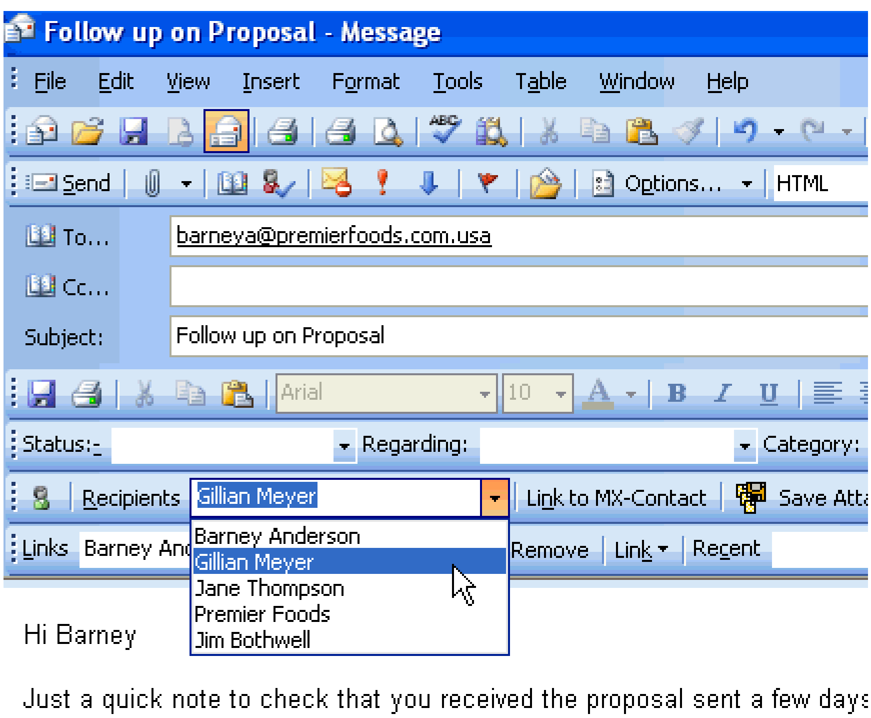
2. Open **Barney Anderson's** Contact Record.
3. Click on the **E-mail** Tab**.**
4. Click on **New E-Mail:**



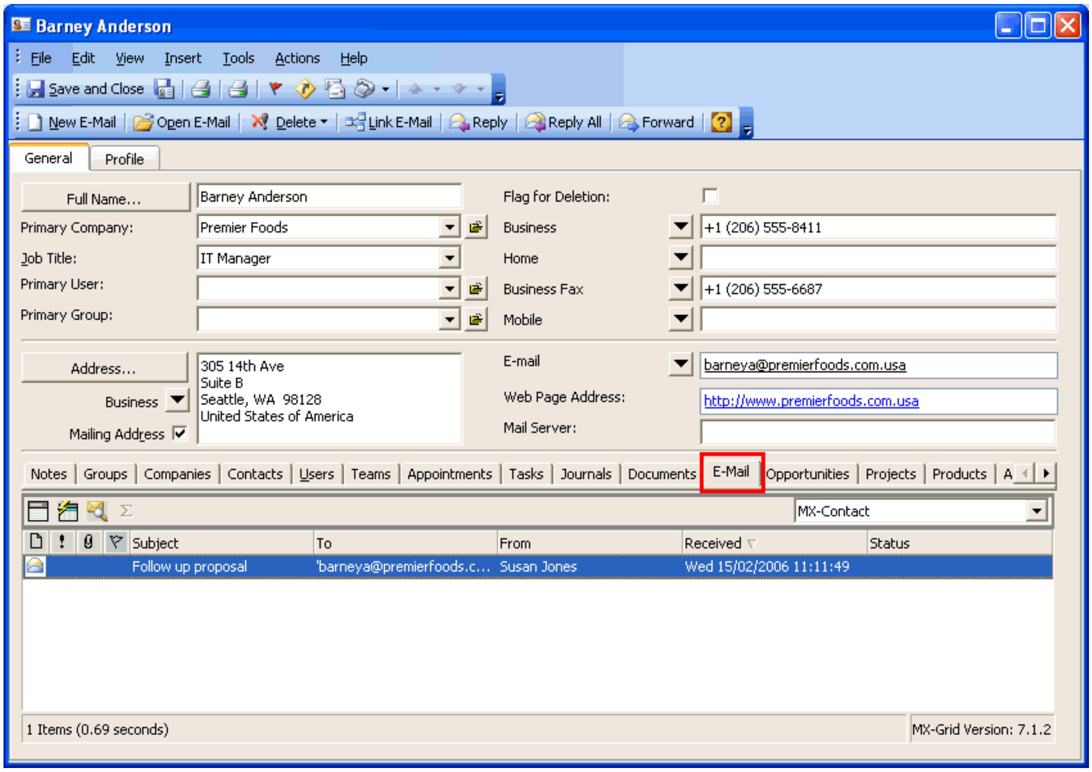
5. Enter the details shown above:



6. To copy the mail to **Gillian Meyer**, position the cursor in the **CC...** field
7. Click on the Recipients button in order to fill the Recipients Combo if necessary and then select **Gillian Meyer** from the **Recipients** dropdown.



8. Click **Send** on the E-Mail.
9. You should now see the e-mail in the **E-Mail** Tab:



10. Click **Save and Close** on the Contact Form.

Take me back to the Exercise (Sending an E-Mail : Exercise)

Take me to the next Exercise (Adding a Journal to a Contact Record : Exercise)

3.15 Adding a Journal to a Contact Record : Exercise

You receive a telephone call from Barney Anderson who has received your proposal and your follow up e-mail. He had some additional questions about commercial terms and conditions. Add a journal to record the details of this call. This will ensure that other users who need to know about this phone call will be able to see the record of the conversation.

Complete the following information on the Journal:

Subject:	**Call about terms and conditions**
Entry Type:	**Phone Call**
Duration:	**15 mins**
Memo:	**Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier would just need to fill out the standard Credit Application Form.**
Regarding:	**Discuss Status**
Category:	**Sales - Prospect**

Show me the **Solution** (Adding a Journal to a Contact Record : Solution)

3.16 Adding a Journal to a Contact Record : Solution

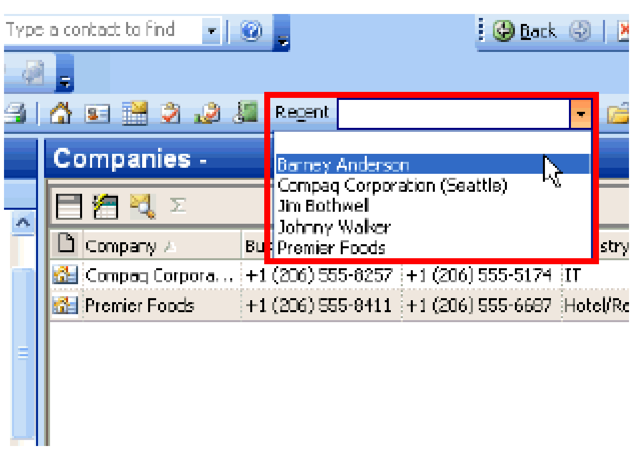
You receive a telephone call from Barney Anderson who has received your proposal and your follow up e-mail. He had some additional questions about commercial terms and conditions. Add a journal to record the details of this call. This will ensure that other users who need to know about this phone call will be able to see the record of the conversation.

Complete the following information on the Journal:

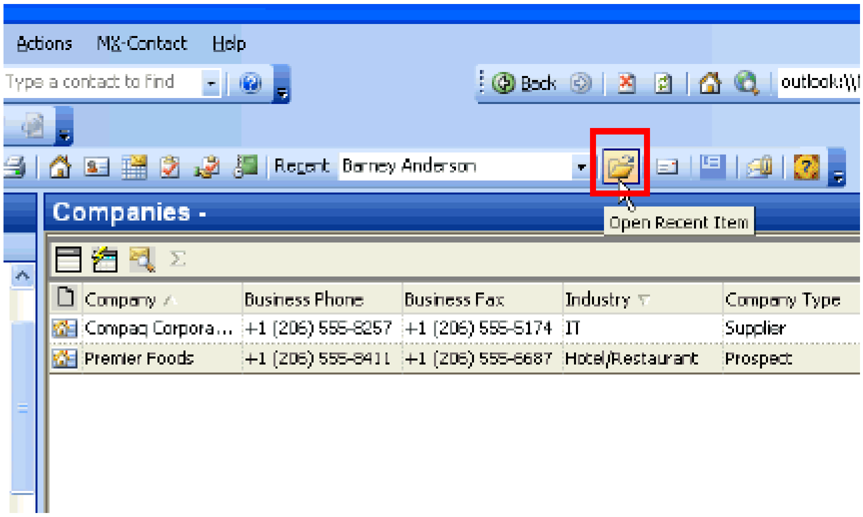
Subject:	**Call about terms and conditions**
Entry Type:	**Phone Call**
Date:	**The day after the follow up e-mail**
Duration:	**15 mins**
Memo:	**Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier would just need to fill out the standard Credit Application Form.**
Regarding:	**Discuss Status**
Category:	**Sales - Prospect**

Basic Steps:

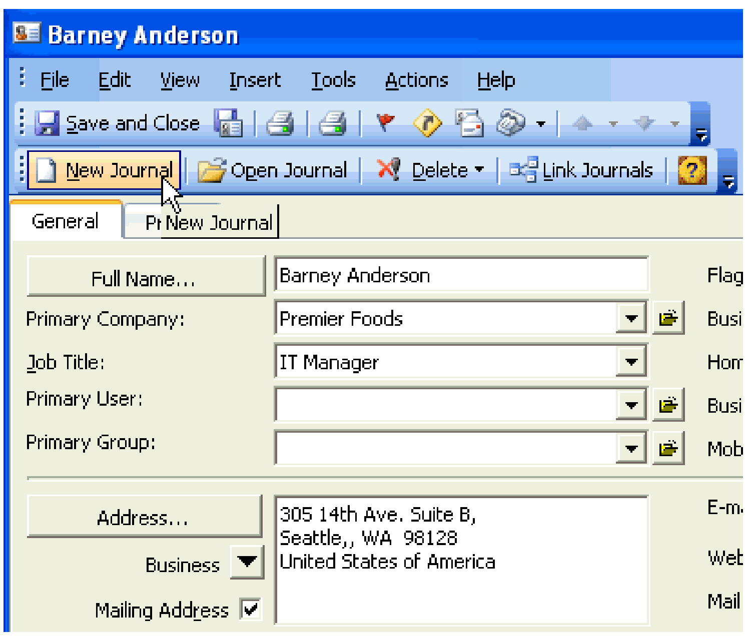
1. Open the contact **Barney Anderson** (try this from Recent Items). Click on the Recent Items drop down list and select **Barney Anderson**.



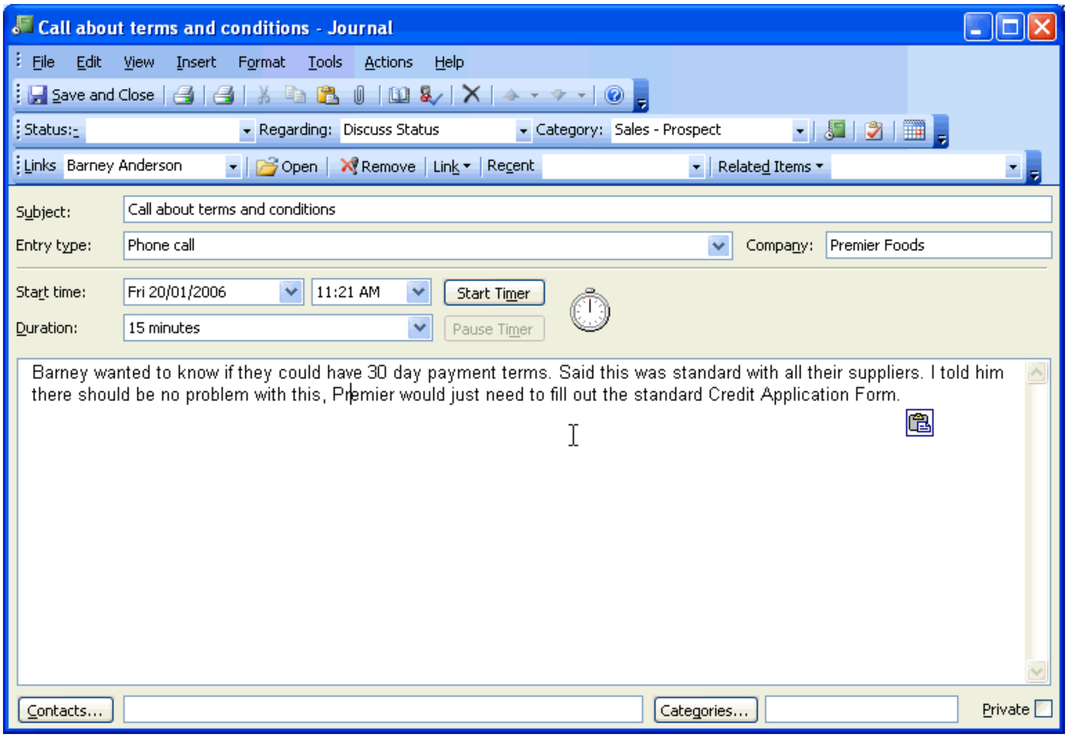
2. Click on the **Open Recent Item** button.



3. Click on the **Journals** Tab
4. Click on **New Journal**:



5. Enter the **Journal** Details:



6. Click **Save and Close** on the **Journal**.
7. Click **Save and Close** on the **Contact**.

Take me back to the Exercise (Adding a Journal to a Contact Record : Exercise)

Take me to the next Exercise (Creating a Contact from an Incoming E-Mail : Exercise)

3.17 Creating a Contact from an Incoming E-Mail : Exercise

You have received an e-mail from a new contact who is not on your MX-Contact database. Use this e-mail to create Contact and Company items and then link the e-mail to both contact and company.

Use any e-mail in your Inbox sent from someone outside your company for this purpose. Use a contact for whom you have more than one e-mail in your Inbox as a second e-mail will be needed for the following exercise **Link an E-Mail** (Linking an Incoming E-Mail : Exercise).

Show me the **Solution** (Creating a Contact from an Incoming E-Mail : Solution)

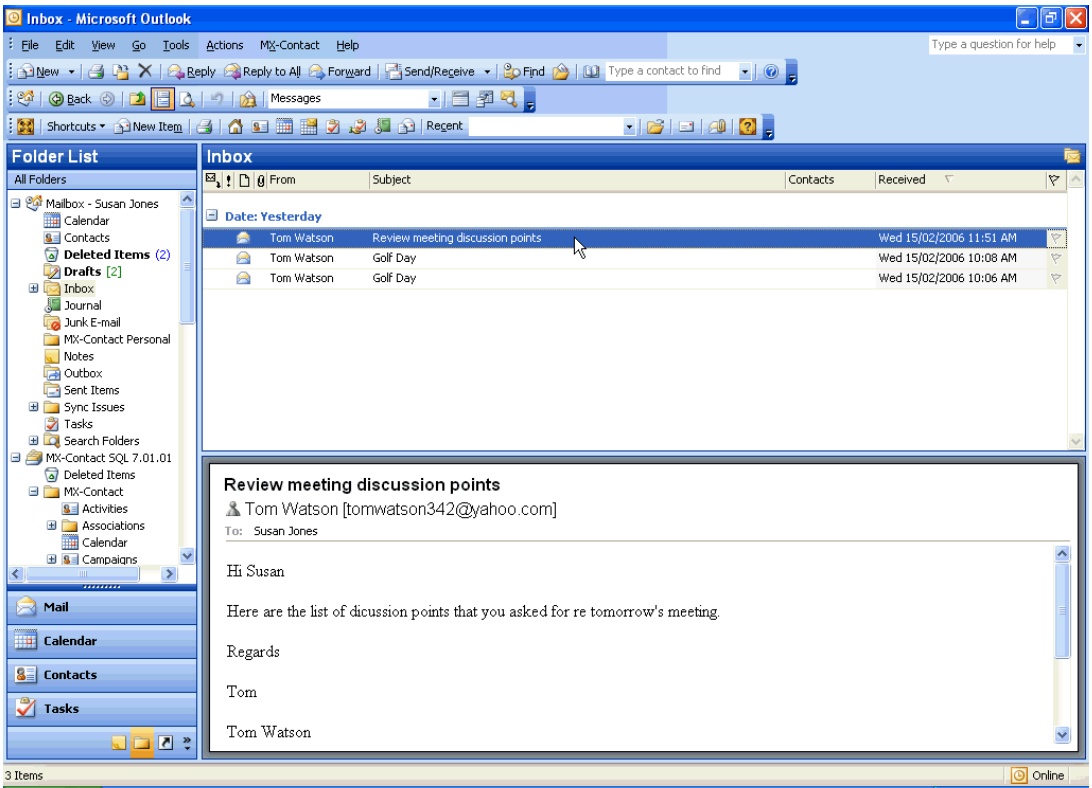
3.18 Creating a Contact from an Incoming E-Mail : Solution

You have received an e-mail from a new contact who is not on your MX-Contact database. Use this e-mail to create Contact and Company items and then link the e-mail to both contact and company.

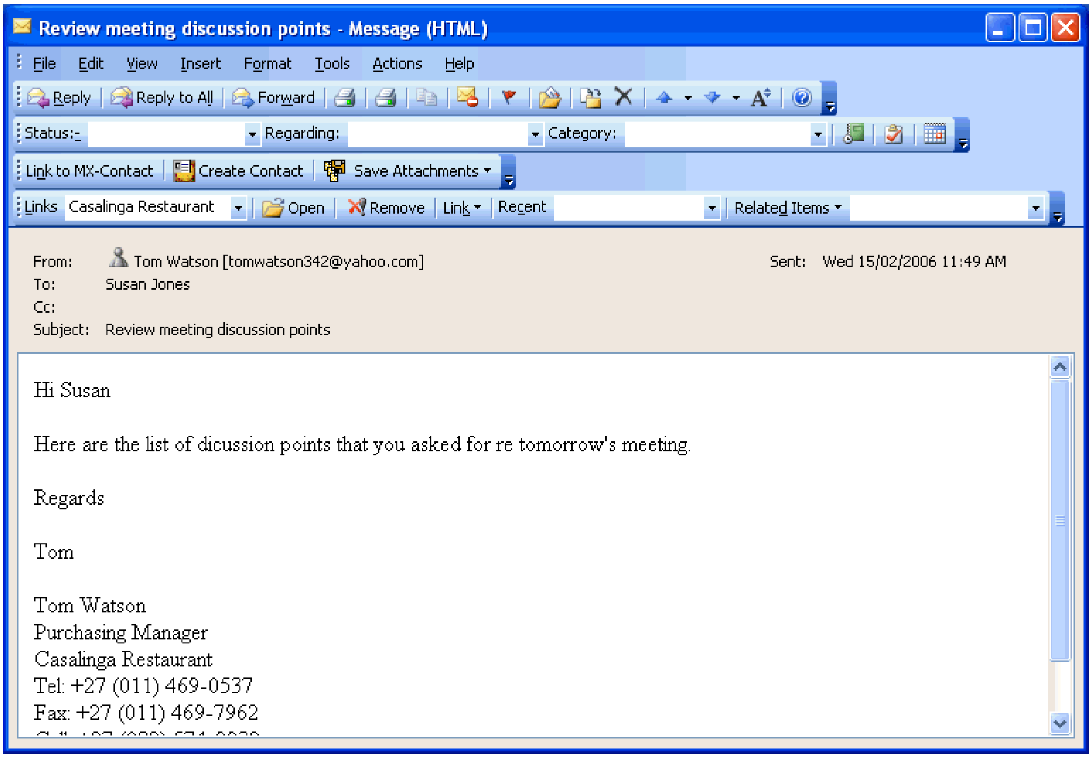
Use any e-mail in your Inbox sent from someone outside your company for this purpose. Use a contact for whom you have more than one e-mail in your Inbox as a second e-mail will be needed for the following exercise **Link an incoming E-Mail** (Linking an Incoming E-Mail : Exercise).

Solution:

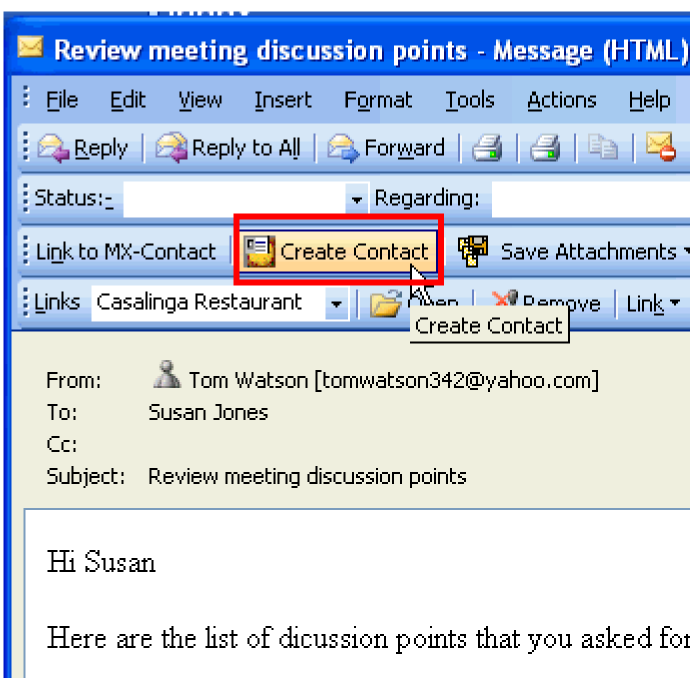
1. Select the e-mail in your Inbox:



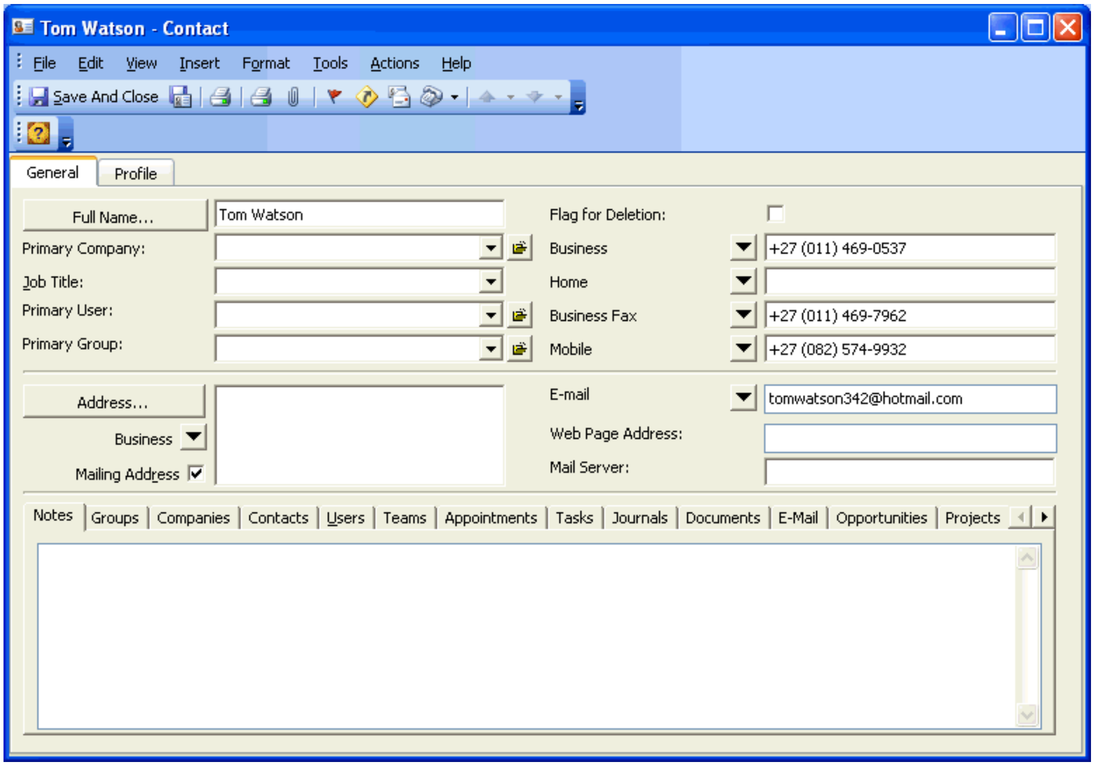
2. Open the e-mail:



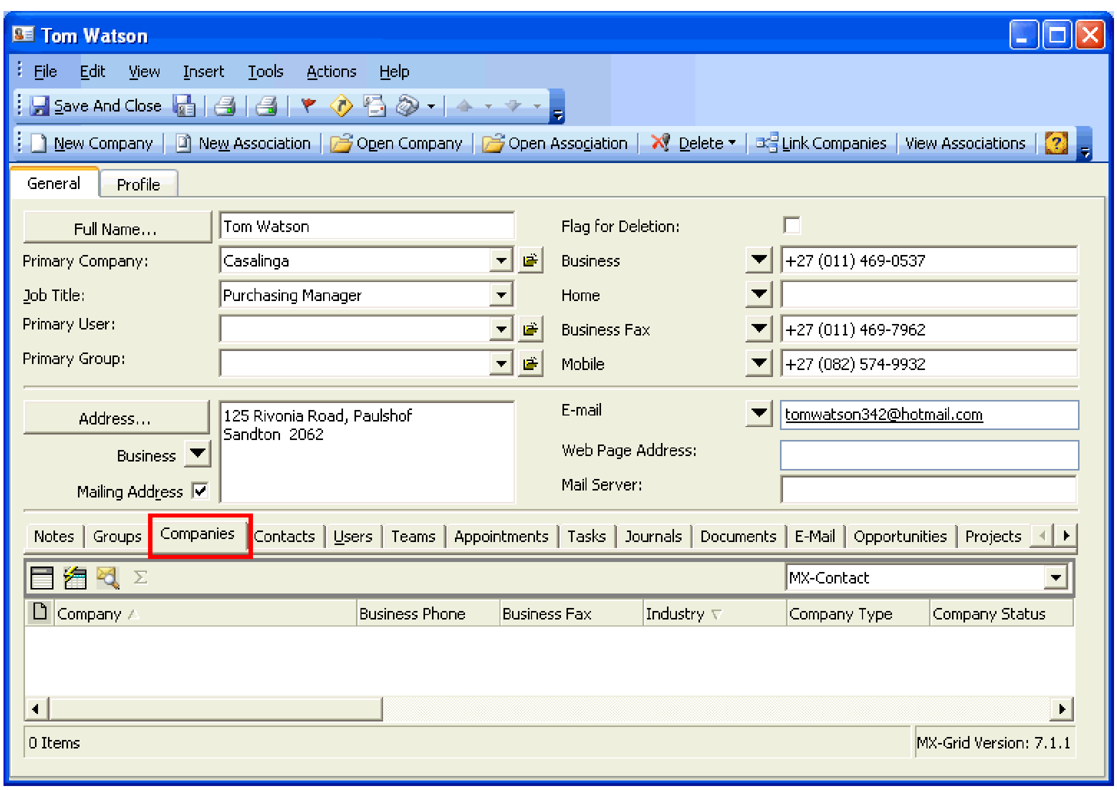
3. Click on **Create Contact**:



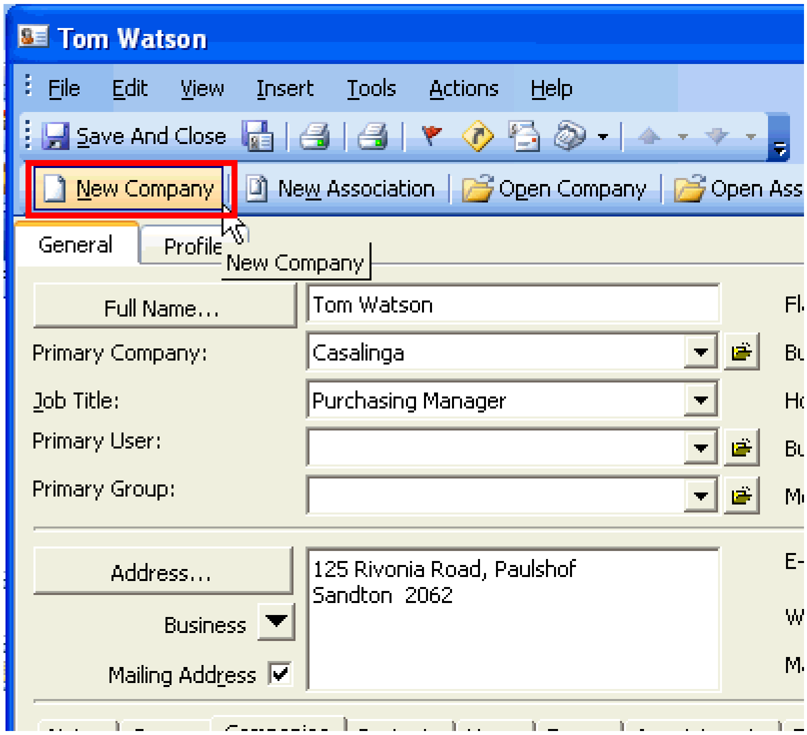
4. A **Contact** Form will open containing personal details of the person that the e-mail was from. These details are retrieved from the person's signature in the e-mail.



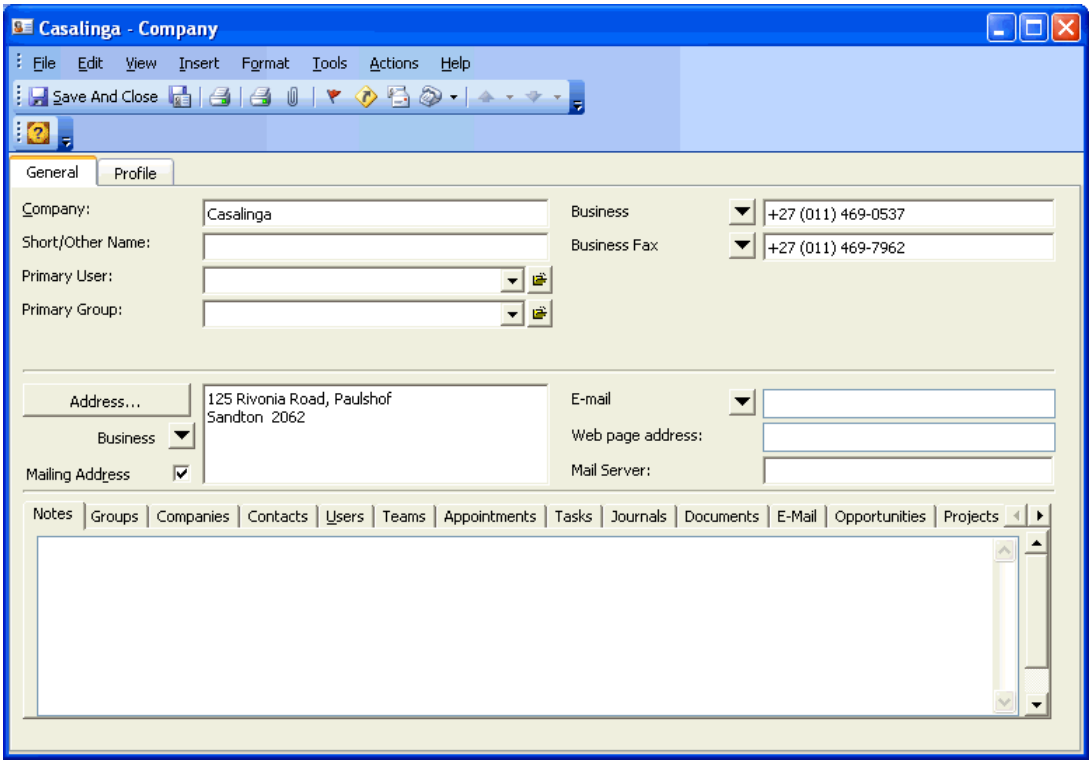
5. Complete the details on the Contact Form, filling in any applicable details such as Company name, Job title, Web page Address etc. Click on the **Companies** tab.



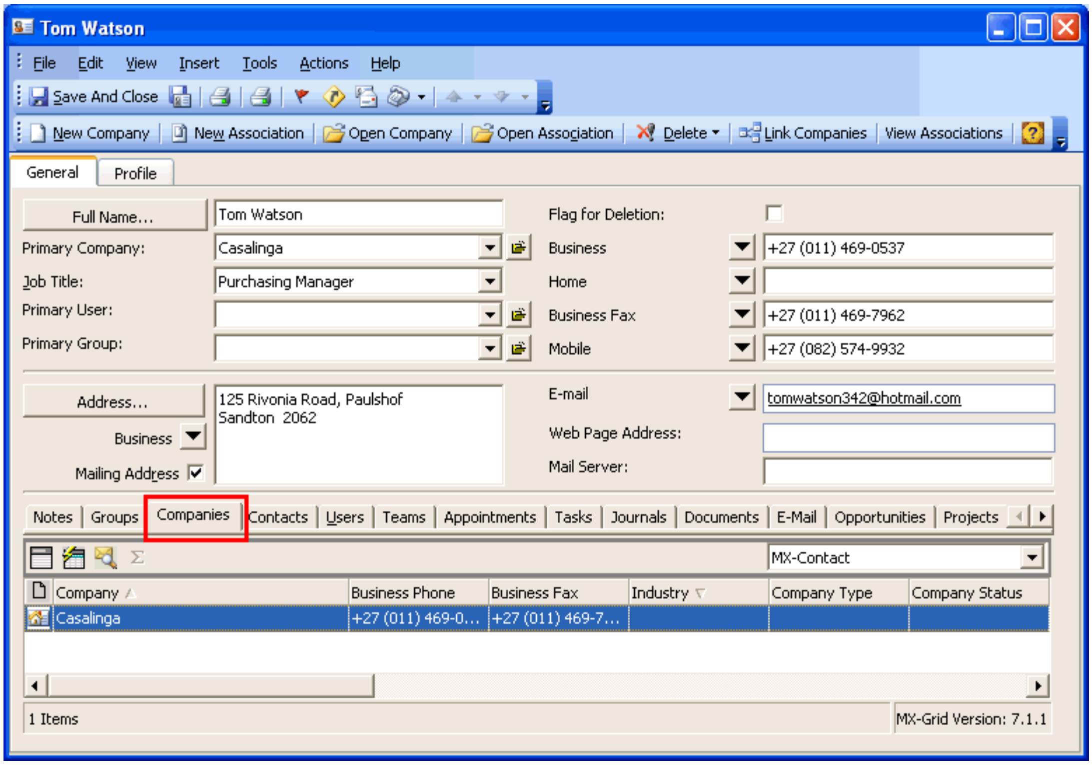
6. Click on **New Company.**



7. A **Company** Form will open.



8. Enter any additional details for the company.
9. Click **Save and Close** on the Company Form:



10. Click **Save and Close** on the Contact Form. You will be returned to the open E-Mail Item.
11. The E-Mail will be automatically linked to the Contact, Company and User.
12. Close the **E-Mail**.

Take me back to the Exercise (Creating a Contact from an Incoming E-Mail : Exercise)

Take me to the next Exercise (Linking an Incoming E-Mail : Exercise)

3.19 Linking an Incoming E-Mail : Exercise

All e-mails that were received prior to a Contact being created for a person in MX-Contact will need to be manually linked to MX-Contact. All E-mails received after a Contact record has been added for that person will automatically be linked to MX-Contact.

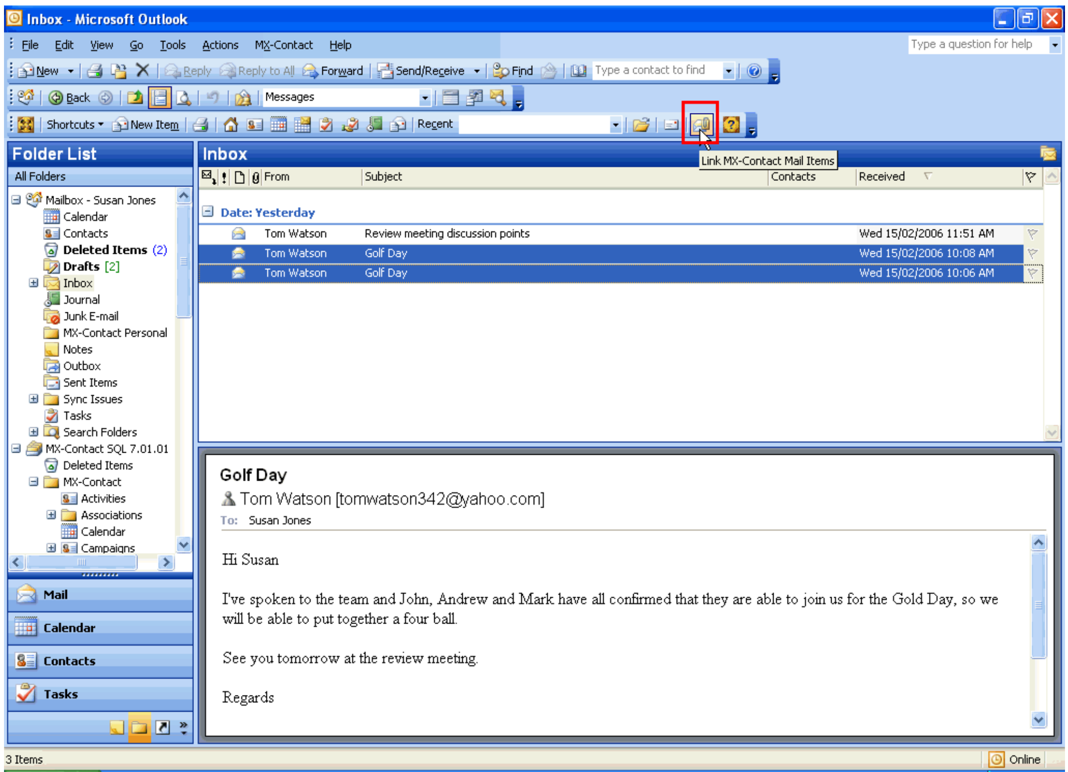
Show me the **Solution** (Linking an Incoming E-Mail : Solution)

3.20 Linking an Incoming E-Mail : Solution

All e-mails that were received prior to a Contact being created for a person in MX-Contact will need to be manually linked to MX-Contact. All E-mails received after a Contact record has been added for that person will automatically be linked to MX-Contact.

Basic Steps:

1. Highlight the e-mail/s in your Inbox.
2. Click the **Link to MX-Contact icon** on the MX-Contact Toolbar**:**



3. The **E-Mail/s** will be automatically linked to the Contact, Company and User:

Take me back to the Exercise (Linking an Incoming E-Mail : Exercise)

Take me to the next Section (Tutorial Exercises - Reports)

4 Tutorial Exercises - Reports

In this section you will perform the following exercises:

1. Run a Contact Summary Report

   Contact Summary Report : Exercise

2. Run a Detail Company Report with Related items

   Company Detail Report with Related Items : Exercise

Once you know how to retrieve information from your database using **Reports** you will be able to do some direct marketing to selected subsets of your database.

Tutorial Exercises - Direct Marketing

4.1 Contact Summary Report : Exercise

Run the **Contact Summary Report Landscape by Last Name, First Name**.

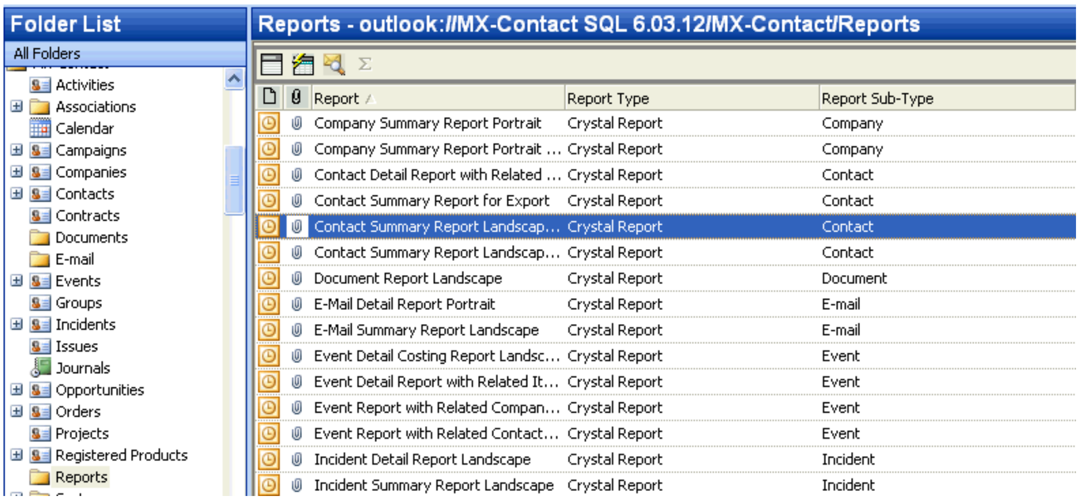
Show me the **Solution** (Contact Summary Report : Solution)

4.2 Contact Summary Report : Solution

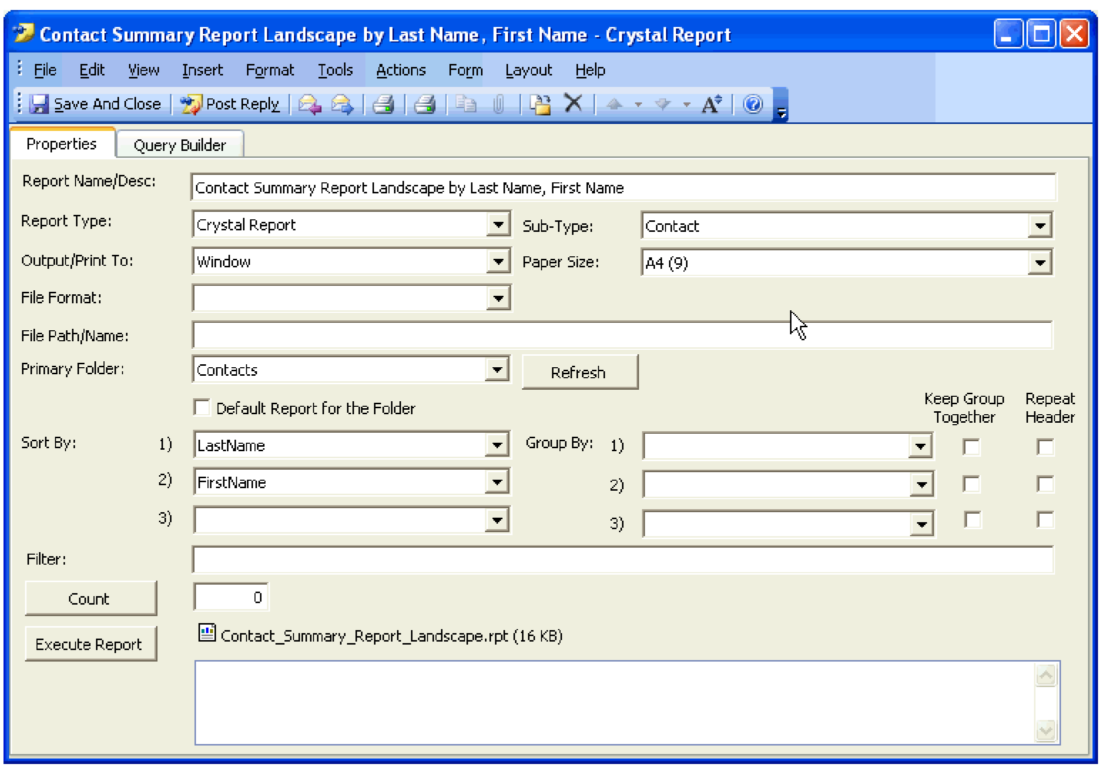
Run the **Contact Summary Report Landscape by Last Name, First Name**.

Basic Steps:

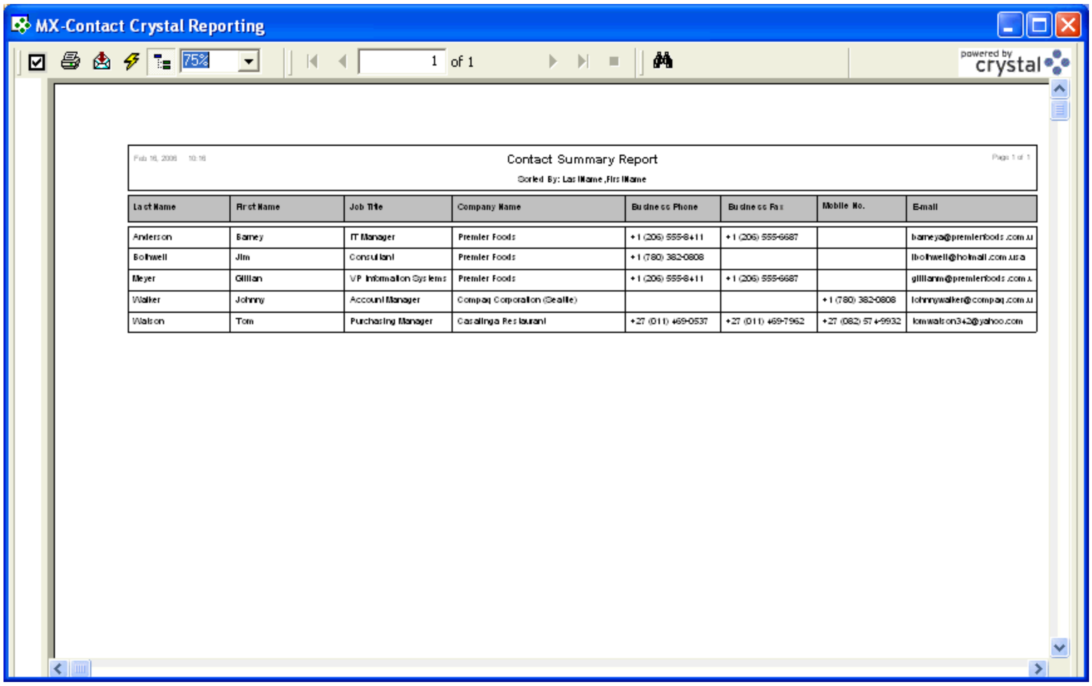
1. View the Folder List by clicking **View** (on the Main Menu), **Folder List** if necessary**.**
2. Click on the **Reports** Folder:



3. Open the **Contact Summary Report Landscape by Last Name, First Name**.



4. Click on **Execute Report.** The following report should be displayed:



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Contact Summary Report

Sorted By: LastName,FirstName

Last Name	First Name	Job Title	Company Name	Business Phone	Business Fax	Mobile No.	E-mail
Anderson	Barney	IT Manager	Premier Foods	+1 (206) 555-8411	+1 (206) 555-6687		barneya@premierfoods.com.au
Bothwell	Jim	Consultant	Premier Foods	+1 (780) 382-0808			lbothwell@hotmail.com.usa
Meyer	Gillian	VP Information Systems	Premier Foods	+1 (206) 555-8411	+1 (206) 555-6687		gillianm@premierfoods.com.a
Walker	Johnny	Account Manager	Compaq Corporation (Seattle)			+1 (780) 382-0808	johnnywalker@compaq.com.au
Watson	Tom	Purchasing Manager	Casalinga Restaurant	+27 (011) 469-0537	+27 (011) 469-7962	+27 (082) 574-9932	tomwatson342@yahoo.com

Take me back to the Exercise (Contact Summary Report : Exercise)

Take me to the next Exercise (Company Detail Report with Related Items : Exercise)

4.3 Company Detail Report with Related Items : Exercise

Run the **Company Detail Report with Related Items Portrait** but just for the company **Premier Foods**.

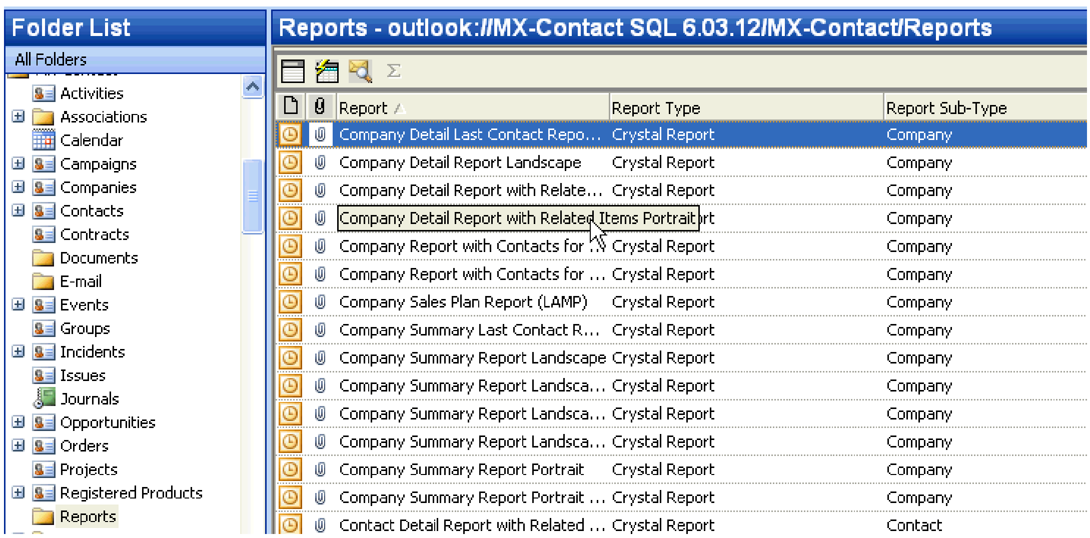
Show me the **Solution** (Company Detail Report with Related Items : Solution)

4.4 Company Detail Report with Related Items : Solution

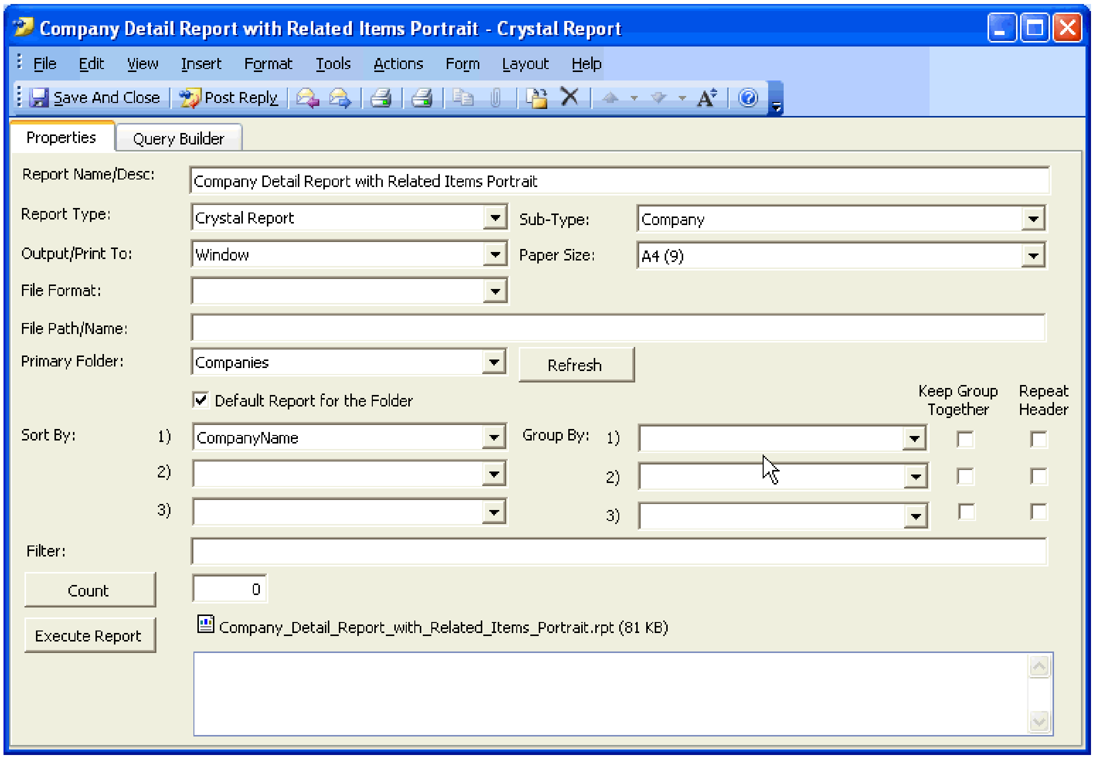
Run the **Company Detail Report with Related Items Portrait** but just for the company **Premier Foods**.

Basic Steps:

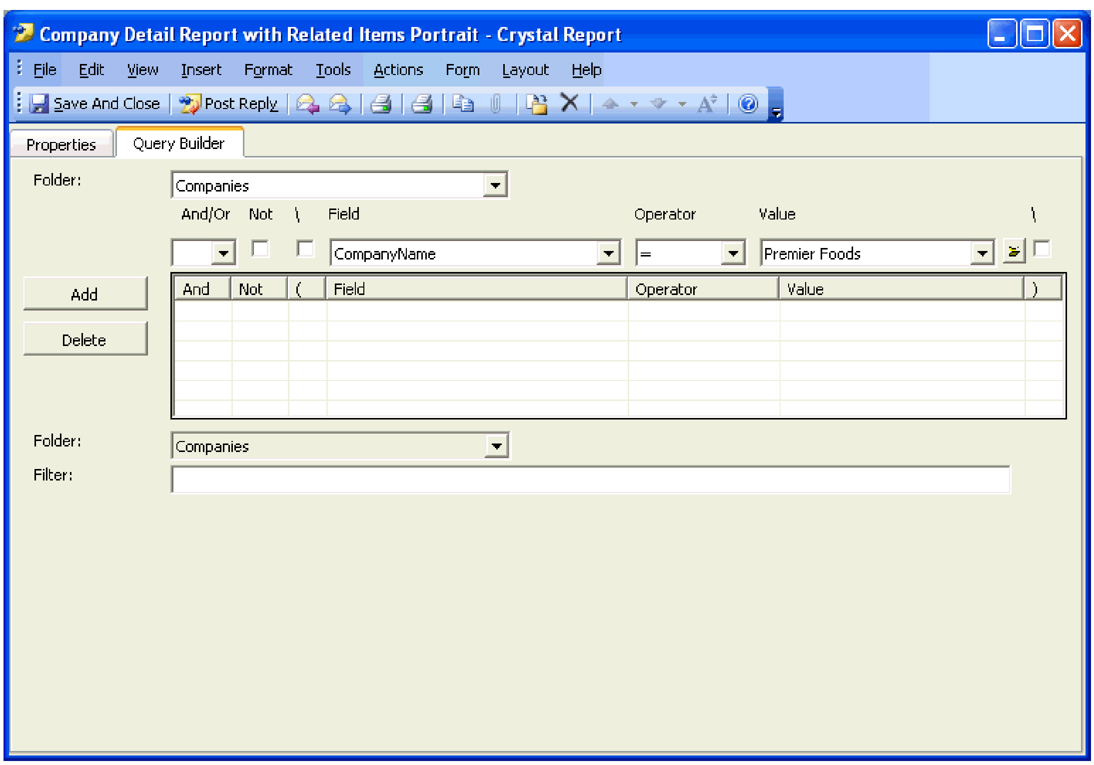
1. View the Folder List by clicking **View** (on the Main Menu), **Folder List** if necessary**.**
2. Click on the **Reports** Folder:



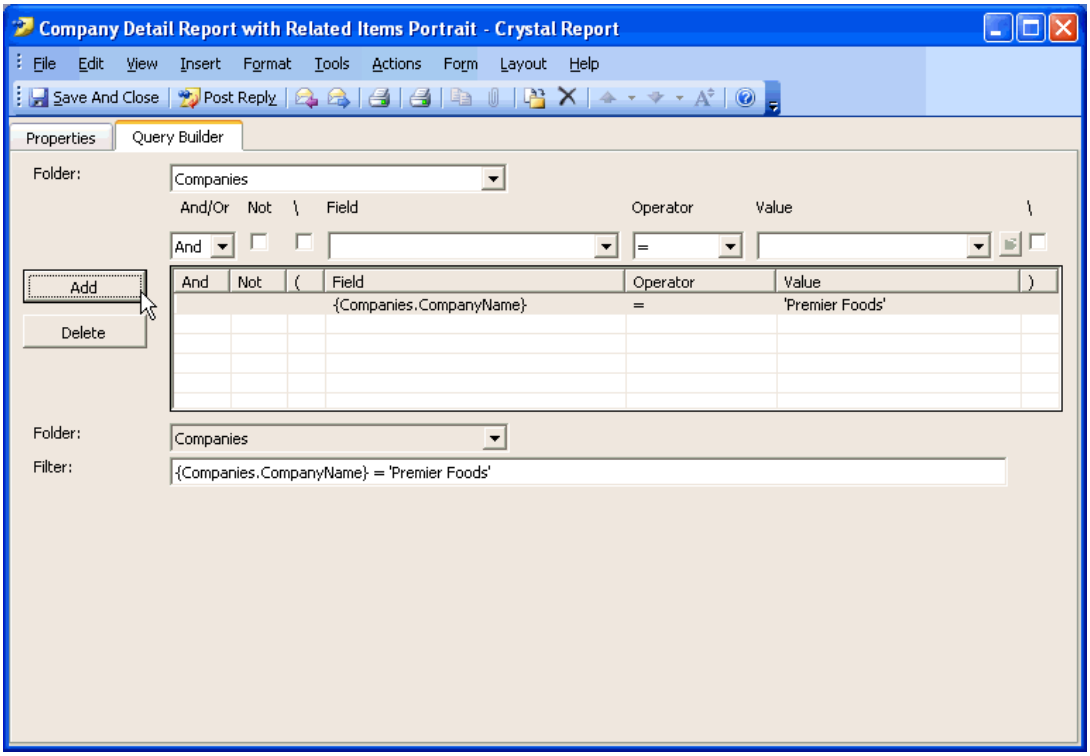
3. Open the **Company Detail Report with Related Items Portrait**:



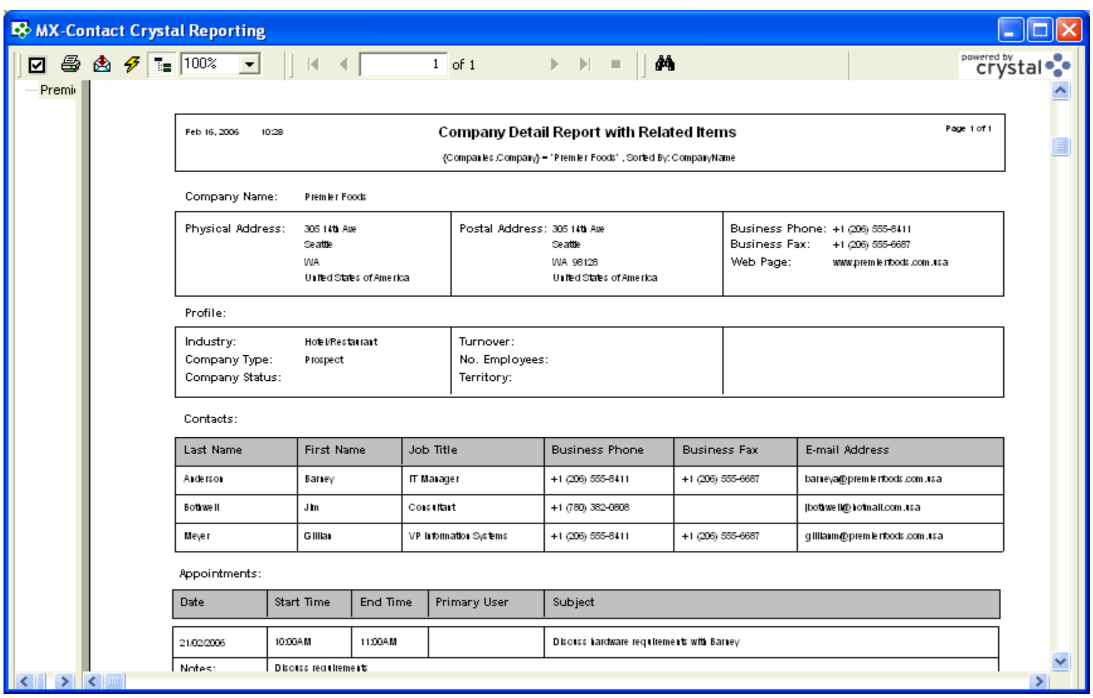
4. Click on the **QueryBuilder** Tab. Enter the condition "CompanyName = **Premier Foods**":



5. Click on **Add** to insert this condition:



6. Return to the **Properties** Tab. Click on **Execute Report.** The following report should be displayed:



Take me back to the Exercise (Company Detail Report with Related Items : Exercise)

Take me to the next Section (Tutorial Exercises - Direct Marketing)

5 Tutorial Exercises - Direct Marketing

In this section you will perform the following exercises:

1. Send a **Personalised Letter** to a selected group of Contacts

   Personalised Letter : Exercise

2. Mail Merge from within Outlook using Word

   Error! Reference source not found.

3. Send a **Personalised E-Mail** to a group of Contacts

   Personalised E-Mail : Exercise

4. Mail Merge Using Word 2000

   Error! Reference source not found.

5. Mail Merge Using Word 2002/2003

   Error! Reference source not found.

5.1 Personalised Letter : Exercise

Send a personalised letter to all the golfers on your database inviting them to a Golf Day.

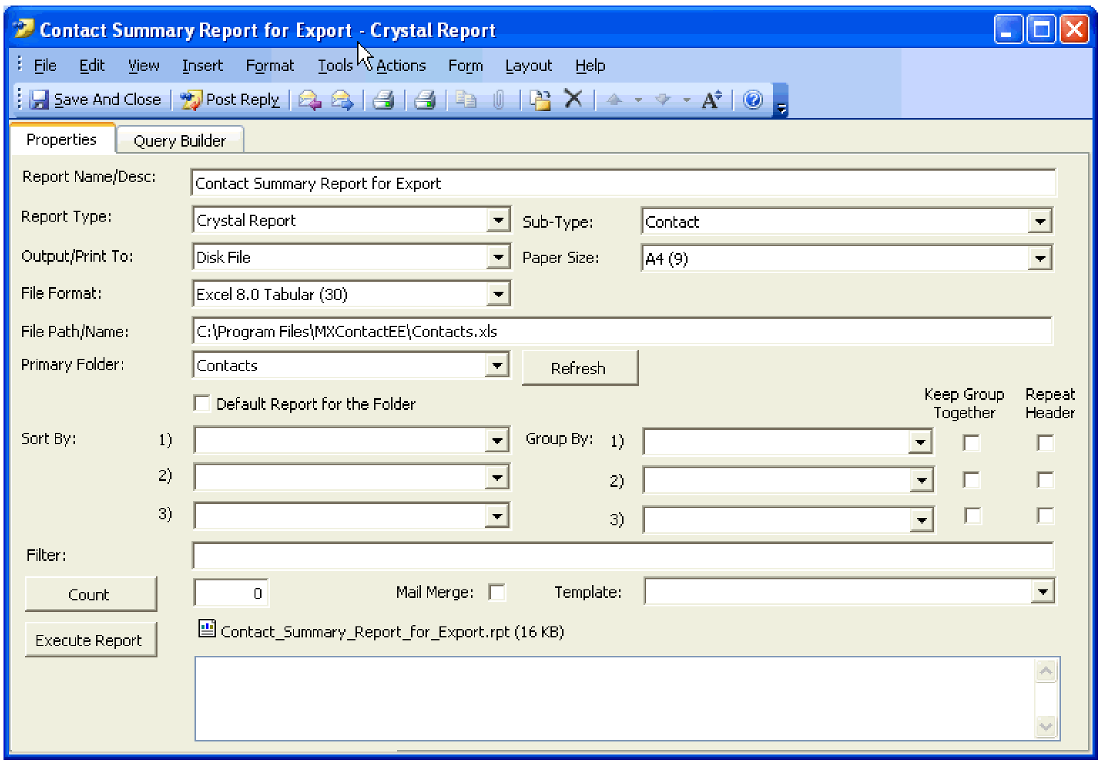
Show me the **Solution** (Personalised Letter : Solution)

5.2 Personalised Letter : Solution

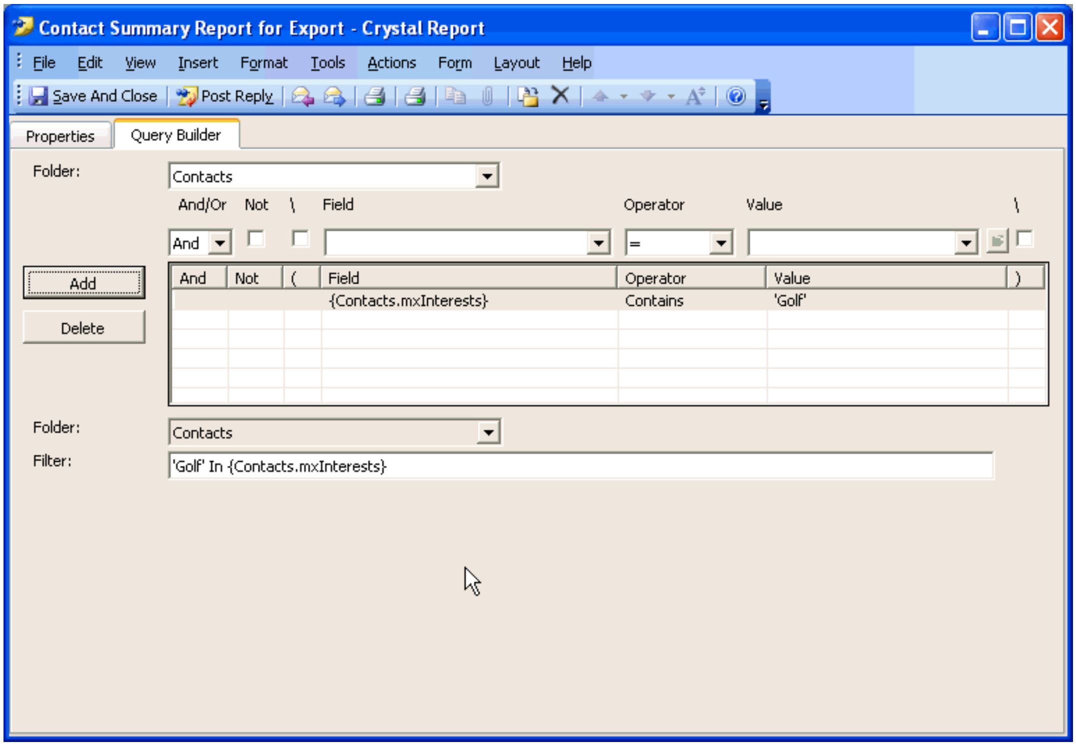
Send a personalised letter to all the golfers on your database inviting them to a Golf Day.

Basic Steps:

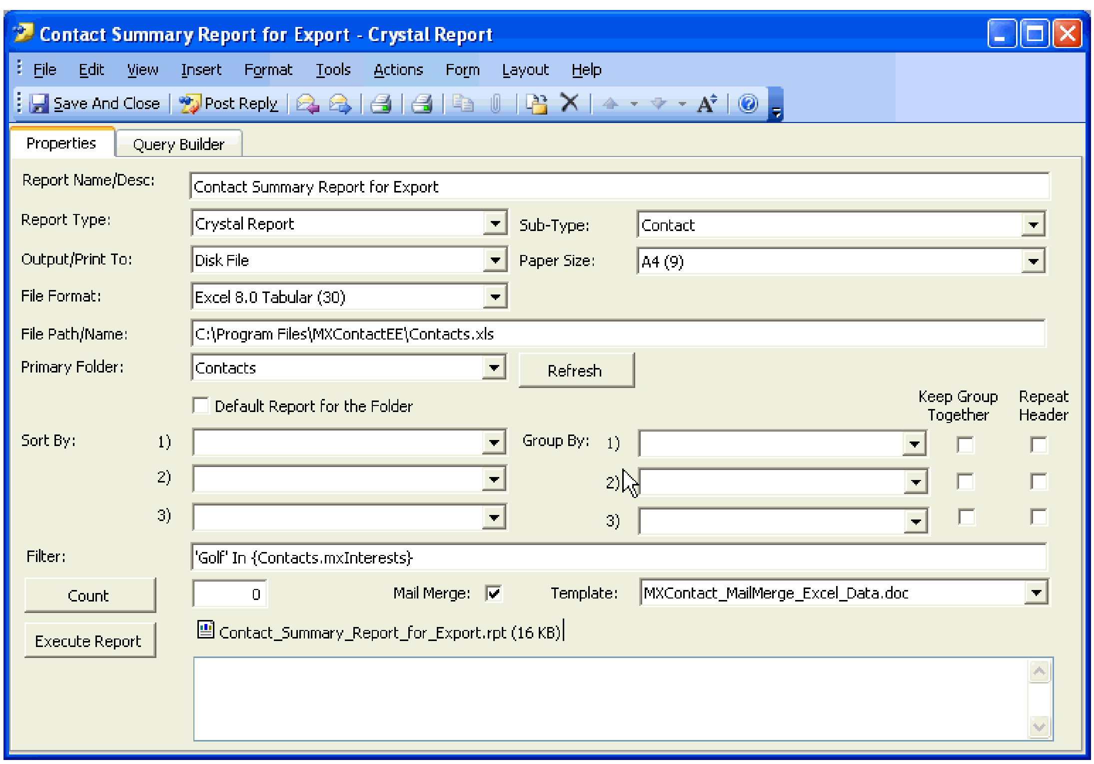
1. Click on the **Reports** Folder. Open the report entitled **Contact Summary Report for Export.** The following screen will appear:



2. Set your filter on each folder using the **Query Builder**. Click on the **Query Builder** Tab. First add the condition for **Interest** (Field **mxInterests**) contains Golf. Set the Operator to **"contains"**,. Click on the Add button.



3. Click back onto the **Properties** Tab. Check the Mail Merge checkbox and select the file MXContact_MailMerge_Excel_Data.doc from the Template drop down list.



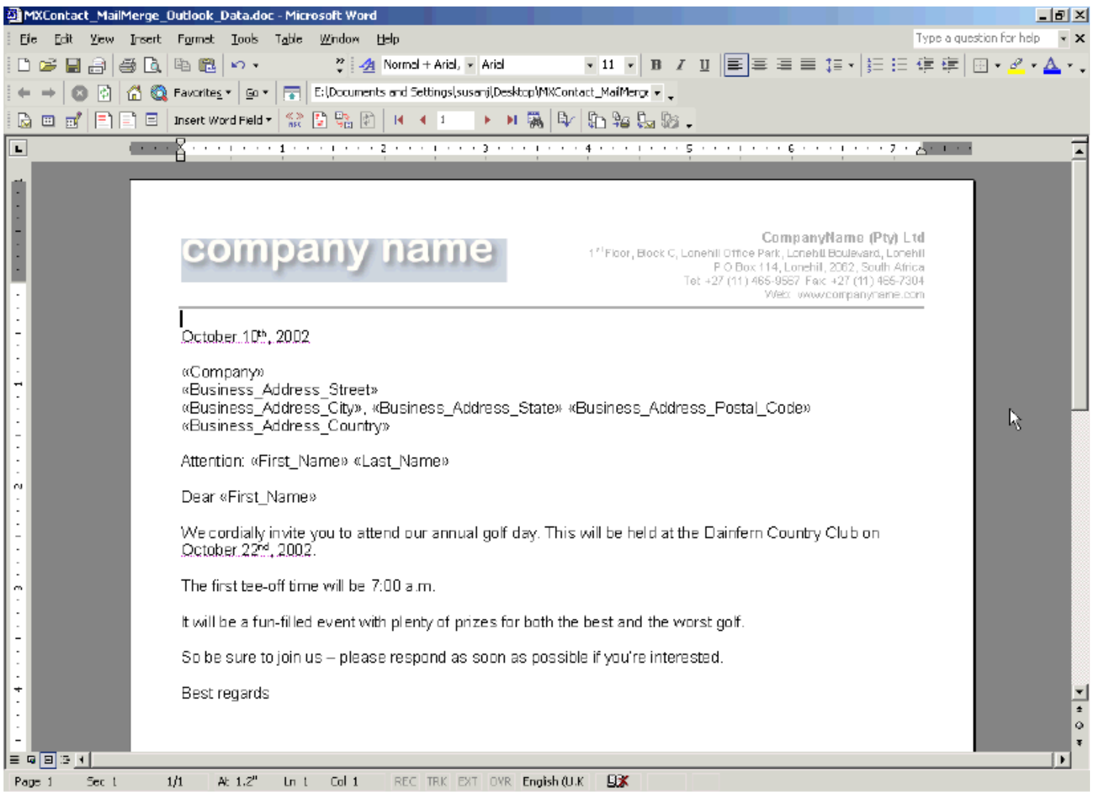
4. Make sure the **Output/Print To** field to is set to **Disk File**.

5. Make sure that **File Format** is set to **Excel 8.0 (XLS)** for the format.

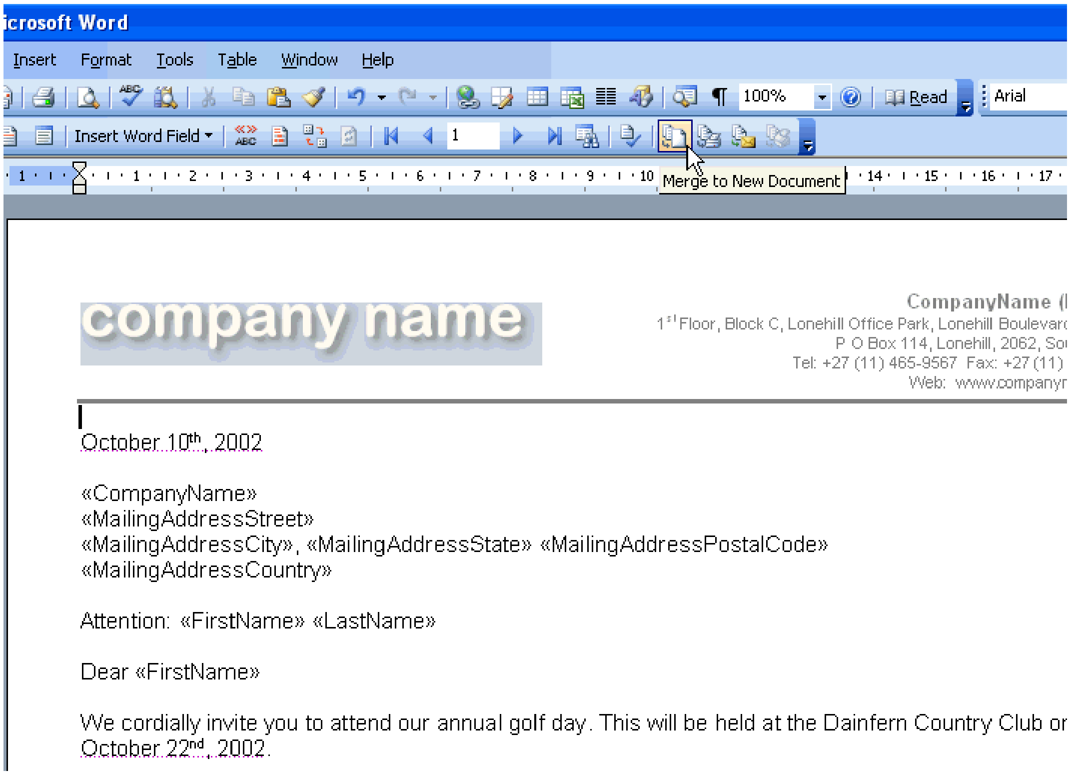
6. Click **Execute Report**.

7. This will create the file needed by Microsoft Word or your Mass E-Mail program. This file contains the most commonly used Company Name and Address fields along with the Contact Address, Job Title and E-Mail fields:

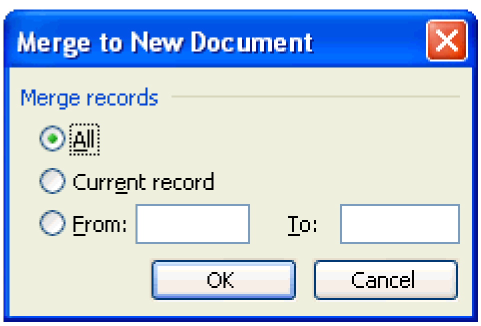
8. Microsoft Word will launch automatically when the template that you selected opens.



9. Make any changes required to the form letter and then click on the **Merge to New Document** icon:



10. You will be prompted to select all records or only a certain range:



11. Your Outlook data will be merged into your Word form letter:

company name

CompanyName (Pty
1^{st} Floor, Block C, Lonehill Office Park, Lonehill Boulevard, Lo
P O Box 114, Lonehill, 2062, South
Tel: +27 (11) 465-9567 Fax: +27 (11) 465
Web: www.companynam

October 10^{th}, 2002

722 da Vinci Boulevard
Kirkland, WA 98034
United States of America

Attention: Johnny Walker

Dear Johnny

We cordially invite you to attend our annual golf day. This will be held at the Dainfern Country Club on October 22^{nd}, 2002.

The first tee-off time will be 7:00 a.m.

It will be a fun-filled event with plenty of prizes for both the best and the worst golf.

So be sure to join us – please respond as soon as possible if you're interested.

Best regards

Janet Leverling

12. Print the letter(s) as required. You can use the same principle to produce mailing labels for your letters.

5.3 Personalised E-Mail : Exercise

Send a personalised e-mail to all the golfers on your database from your suppliers asking them to each sponsor a hole on the day of the event.

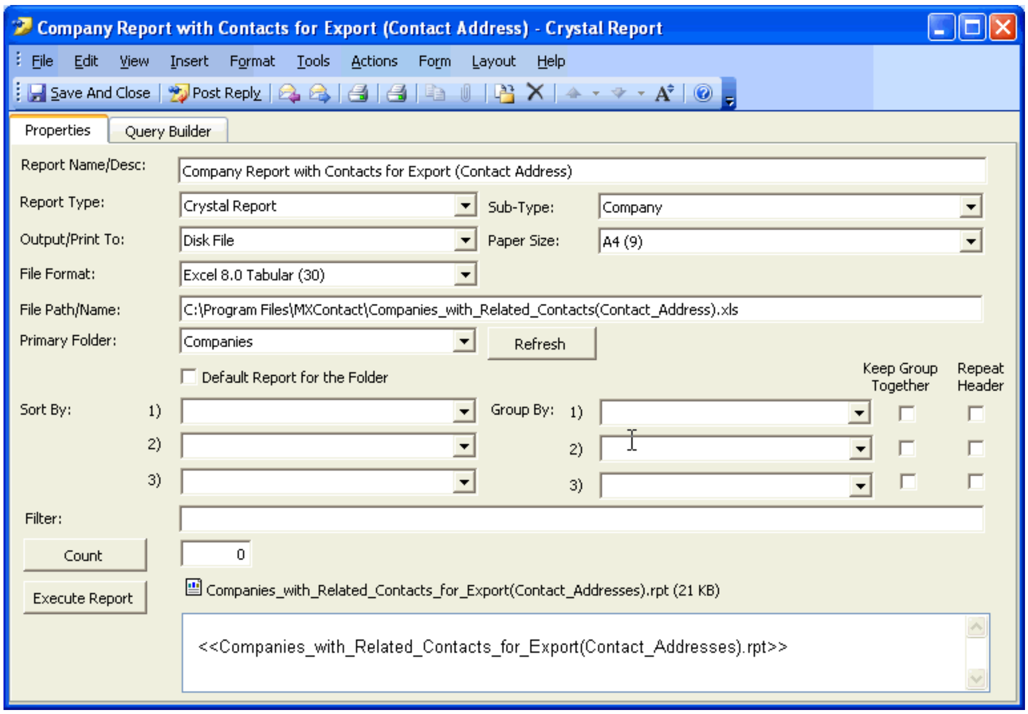
Show me the **Solution** (Personalised E-Mail : Solution)

5.4 Personalised E-Mail : Solution

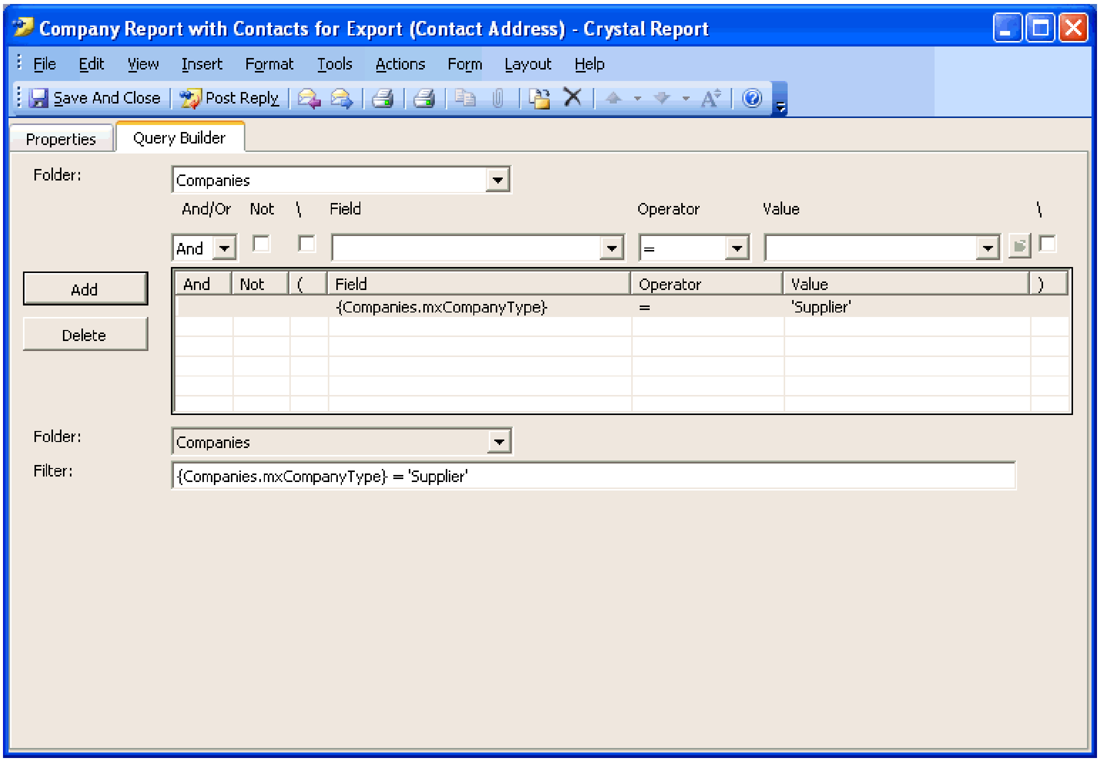
Send a personalised e-mail to all the golfers on your database from your suppliers asking them to each sponsor a hole on the day of the event.

Basic Steps:

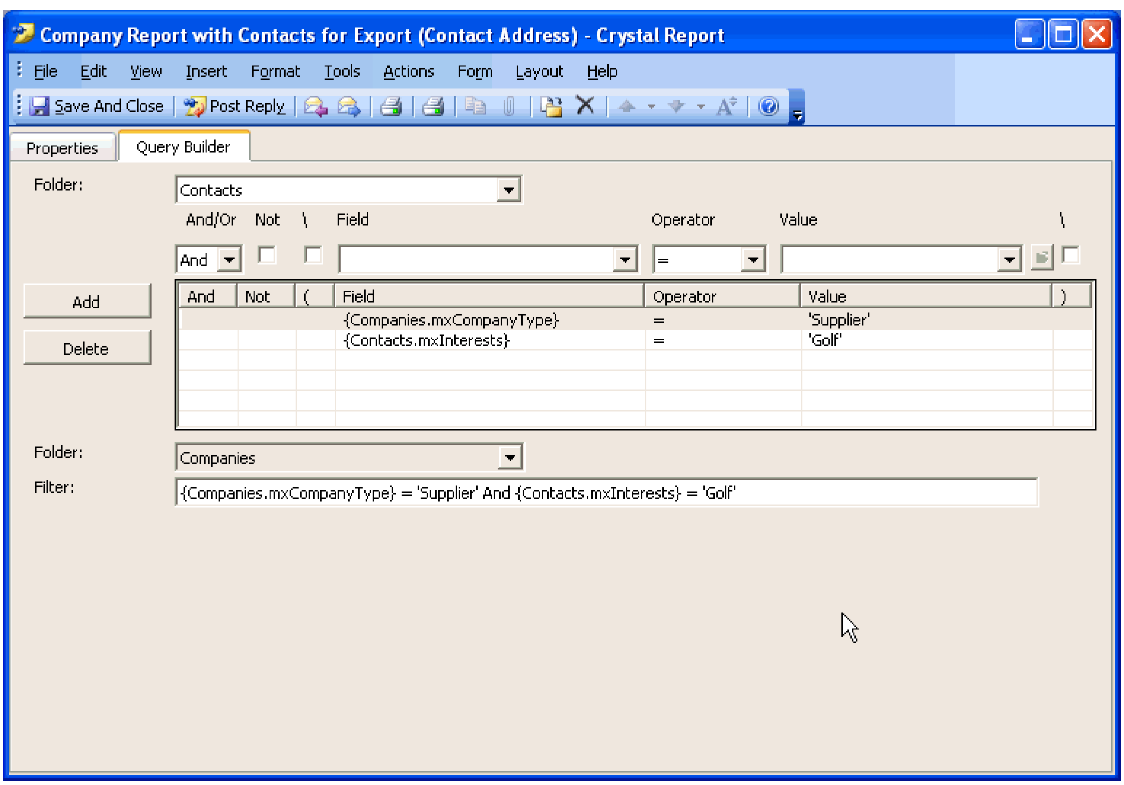
1. Click on the **Reports** Folder. Open the report entitled **Company Report with Contacts for Export (Contact Address).** The following screen will appear:



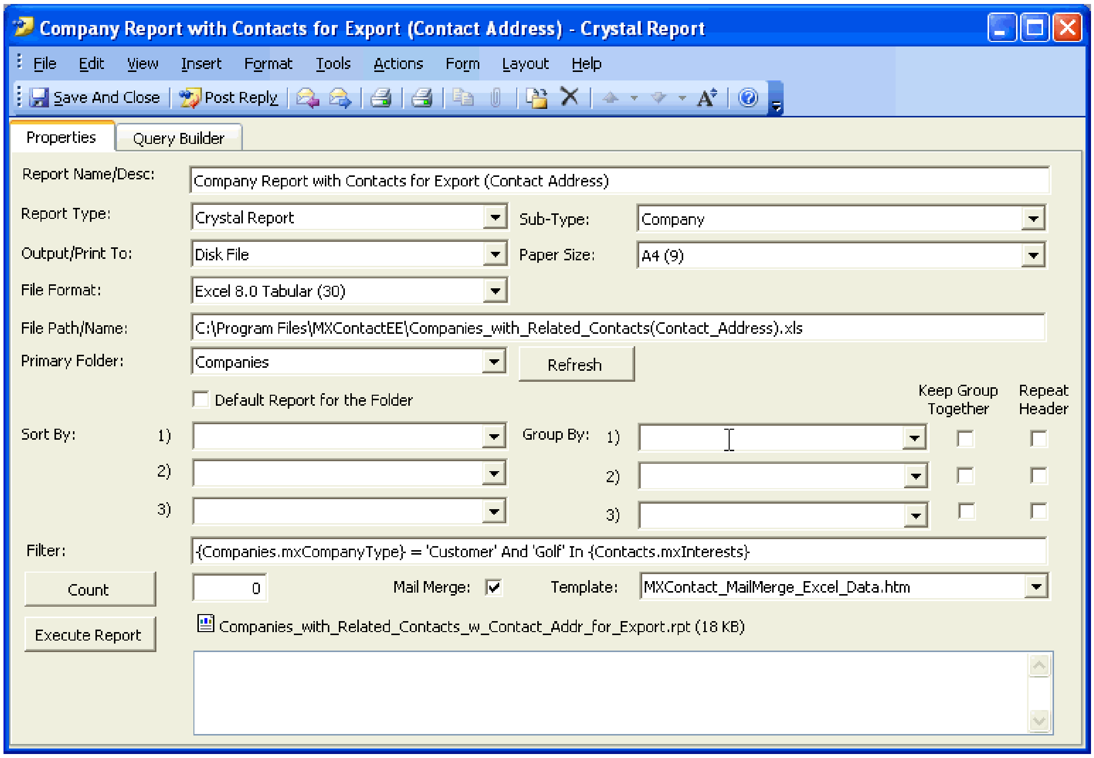
2. Set your filter on each folder using the **Query Builder**. Click on the **Query Builder** Tab. First add the condition for **Company Type** = Supplier. The **Companies** folder will be the default on this report. Select the field **mxCompanyType** from the **Field** dropdown. Leave the Operator set to **"="**, and select **Supplier** from the **Value** dropdown. Click on the **Add** button to add the first condition of the query.



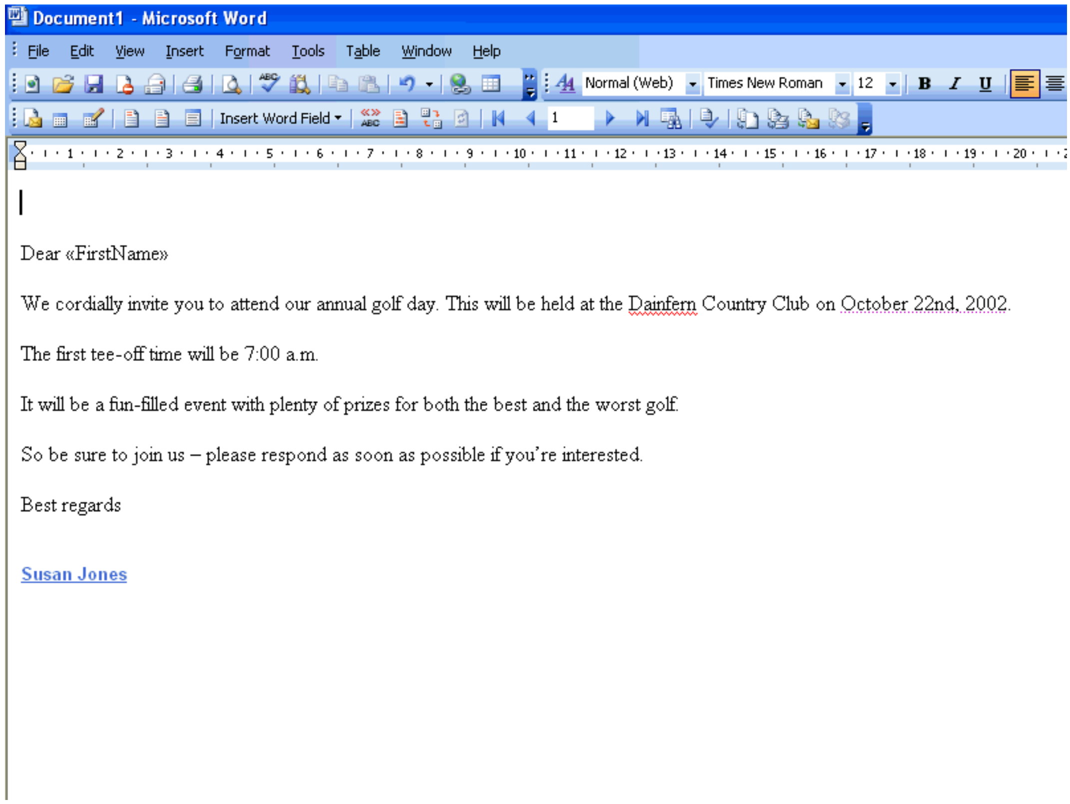
3. Then add your condition for "Golfers" on the **Contacts** folder. Select the **Contacts Folder** from the Folder drop down list. Use the **Field** Picklist to select **mxInterests**. Select **Golf** in the **Value** field. Click on the **Add** button to add the second condition of the query.



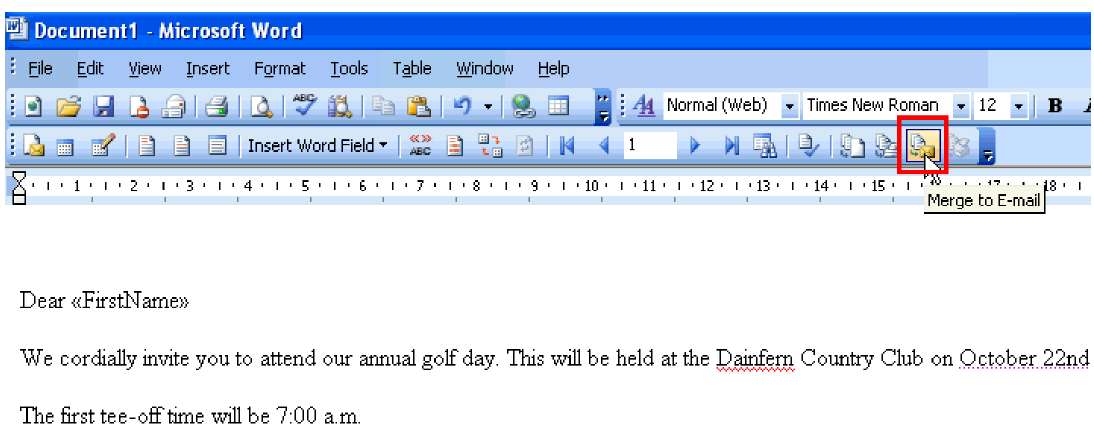
4. Click back onto the **Properties** Tab:



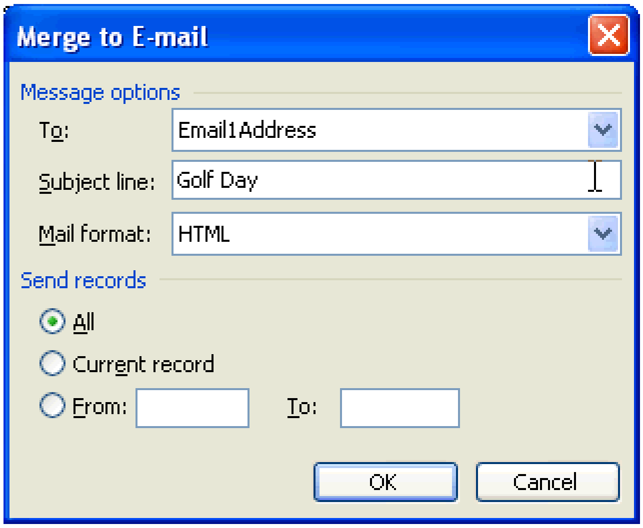
5. Make sure the **Output/Print To** field is set to **Disk File**.
6. Make sure that **File Format** is set to **Excel 8.0 (XLS)** for the format.
7. Check the Mail Merge checkbox.
8. Select the template MXContact_MailMerge_Excel_Data.htm.
9. Click **Execute Report**.
10. Microsoft Word will launch automatically when the template that you selected opens.



11. Click on the Merge to Email icon.



12. Select the Email1Address field and enter a Subject for your e-mails.



13. Click on OK. All contacts in this mail merge file will be merged with the document and automatically sent. Check your Sent Items to see that this has happened.
14. Close the document without saving.