

*Exchange***W!se**

MESSAGING, COLLABORATION AND CRM SPECIALISTS

MX-Contact

Base System Tutorial



**The complete Customer Relationship,
Contact Management
and
Sales Automation System
for
Microsoft Outlook**

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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 **recording 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:

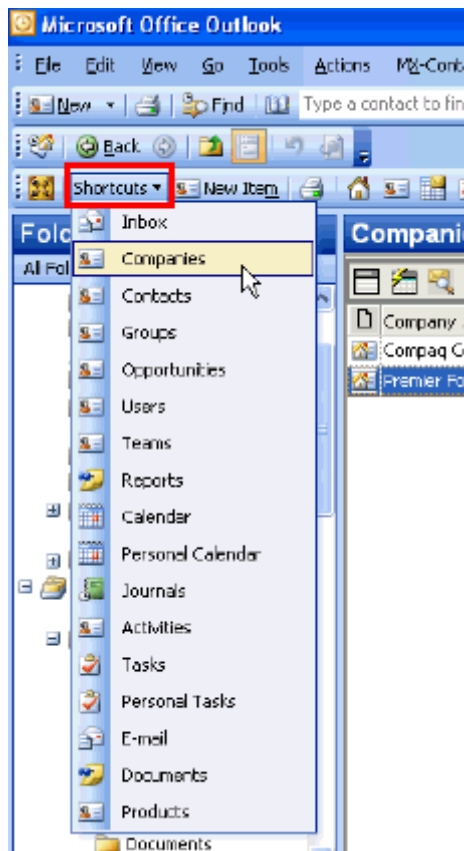
Company Name:	Compaq Corporation (Seattle)
Address:	722 da Vinci Boulevard, Kirkland, WA, 98034, United States of America
Telephone:	+1 (206) 555-8257
Fax:	+1 (206) 555-5174
Web site URL:	www.compaq.com.usa

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

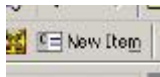
Industry:	IT
Company Type:	Supplier

Basic Steps:

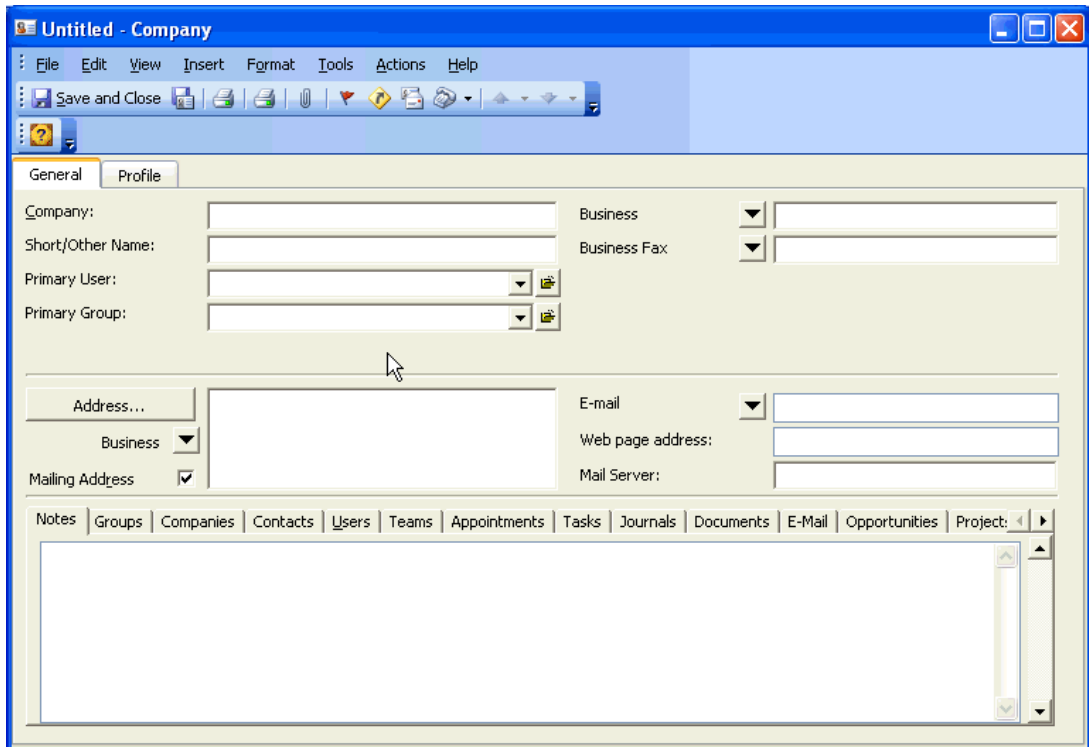
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



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



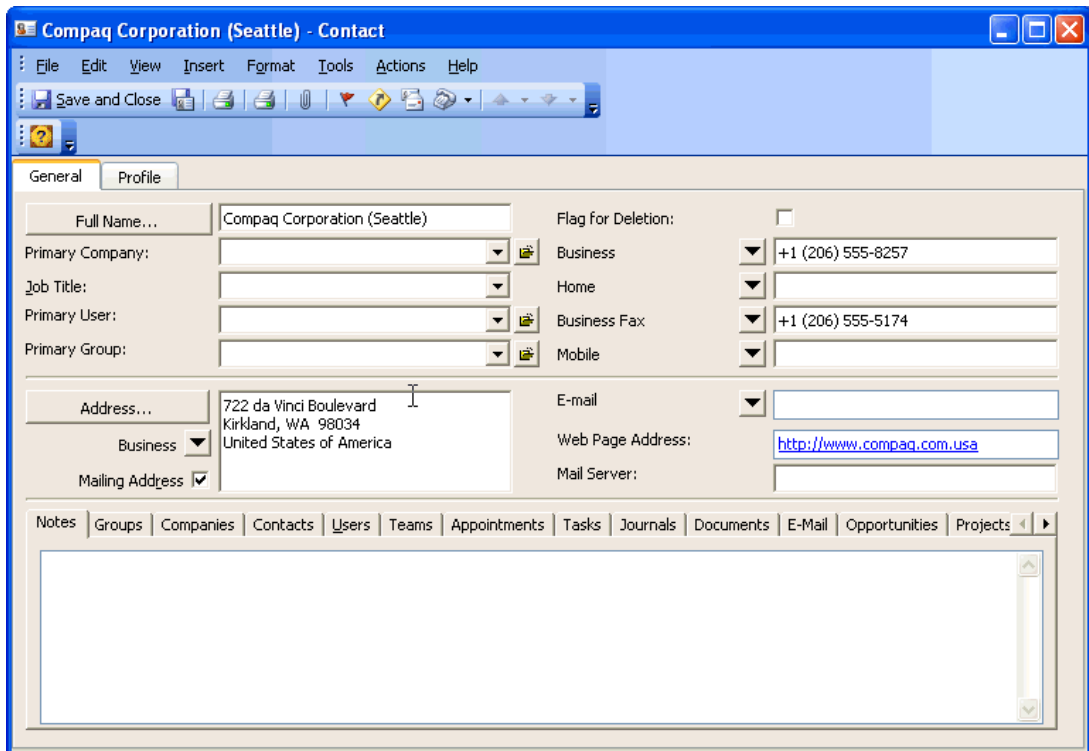
3. A blank **Company** Form will open:



- 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

The screenshot shows a software window titled "Compaq Corporation (Seattle) - Company". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons, including "Save and Close". The main area of the window is divided into two tabs: "General" and "Profile". The "Profile" tab is selected and contains the following fields:

- Company: Compaq Corporation (Seattle)
- Company ID: 9BC4F5A0-5D4A-402C-B7B9-CC0DD7B9140
- Legal/Commercial Name: Compaq Corporation (Seattle)
- Group ID: (empty)
- Company Registration No.: (empty)
- VAT/Tax Registration No.: (empty)
- Customer No.: (empty)
- Industry: IT (dropdown menu)
- Territory ID: (empty)
- Company Type: Supplier (dropdown menu)
- Company Status: (empty)
- Turnover: 0
- No Employees: 0
- Categories: Category 1, Category 2, Category 3

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:

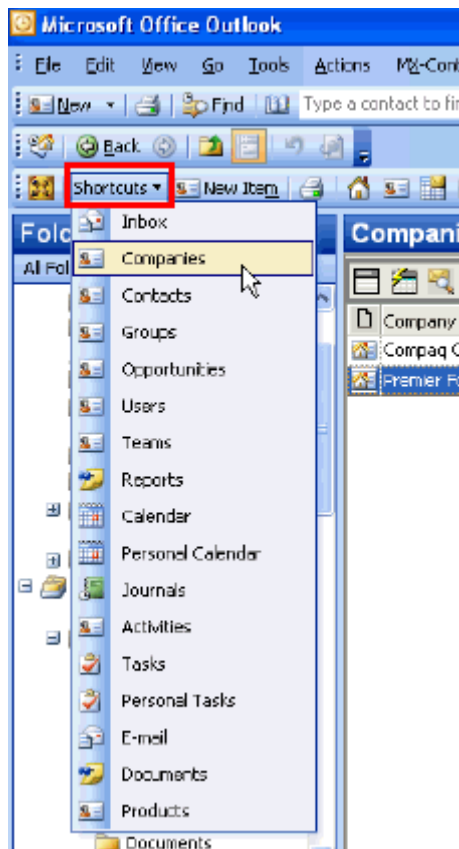
Company Name:	Unlimited Technologies, Inc.
Web site URL:	www.unlimitedtech.com.usa

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

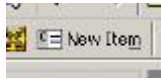
Industry:	IT
Company Type:	Competitor

Basic Steps:

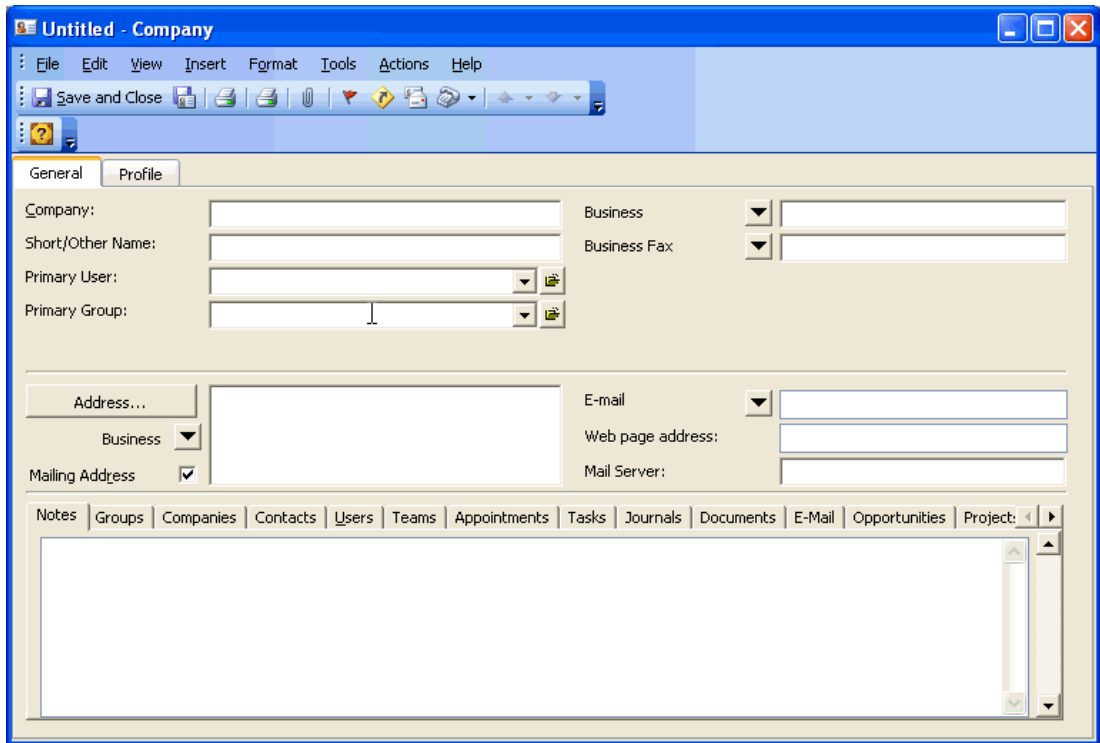
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



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



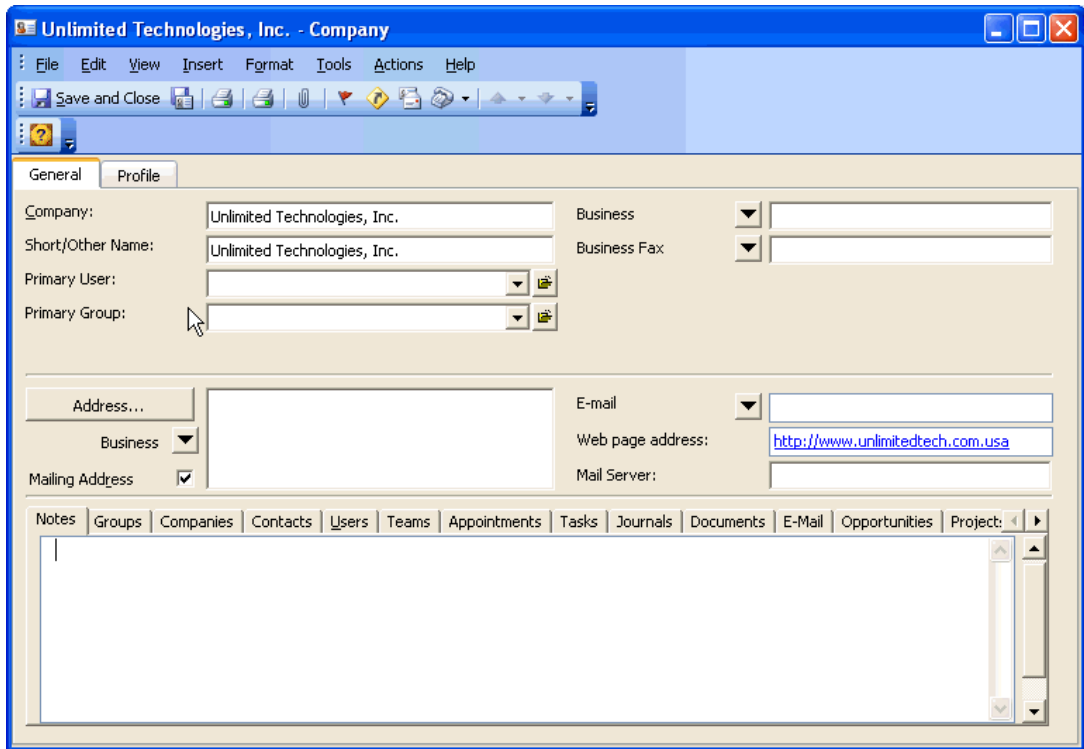
3. A blank **Company** Form will open:



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

The screenshot shows a software window titled "Unlimited Technologies, Inc. - Company". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons, including a "Save and Close" button. The main area of the window is divided into two tabs: "General" and "Profile". The "Profile" tab is active, showing a form with the following fields:

Company:	Unlimited Technologies, Inc.	Company ID:	8DBD3152-C466-4AE7-9FFA-E4A48C5CE11
Legal/Commercial Name:	Unlimited Technologies, Inc.	Group ID:	
Company Registration No:			
VAT/Tax Registration No:			
Customer No:			
Industry:	IT	Categories:	<input type="checkbox"/> Category 1 <input type="checkbox"/> Category 2 <input type="checkbox"/> Category 3
Territory ID:			
Company Type:	Competitor		
Company Status:			
Turnover:	0		
No Employees:	0		

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:

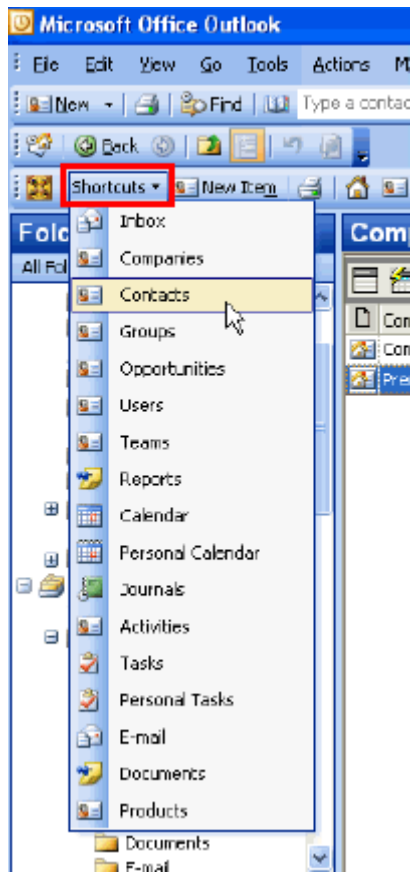
Name:	Jim Bothwell
Primary Company:	JMB Consultants
Job Title:	Consultant
Mobile:	+1 (780) 382-0808
E-Mail:	jbothwell@hotmail.com.usa

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

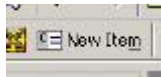
Interests:	Golf, Tennis
-------------------	---------------------

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:

The screenshot shows the 'Untitled - Contact' window in the MX-Contact software. The 'General' tab is selected, and the 'Profile' sub-tab is active. The form contains the following fields:

- Full Name...: [Empty]
- Primary Company: [Empty]
- Job Title: [Empty]
- Primary User: [Empty]
- Primary Group: [Empty]
- Address...: [Empty]
- Business: [Dropdown]
- Mailing Address:
- Flag for Deletion:
- Business: [Dropdown]
- Home: [Dropdown]
- Business Fax: [Dropdown]
- Mobile: [Dropdown]
- E-mail: [Dropdown]
- Web Page Address: [Empty]
- Mail Server: [Empty]

At the bottom, there is a navigation bar with tabs for Notes, Groups, Companies, Contacts, Users, Teams, Appointments, Tasks, Journals, Documents, E-Mail, Opportunities, and Projects.

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

The screenshot shows the 'Jim Bothwell - Contact' window in the MX-Contact software. The 'General' tab is selected, and the 'Profile' sub-tab is active. The form contains the following fields:

- Full Name...: JimBothwell
- Primary Company: JMB Consultants
- Job Title: Consultant
- Primary User: [Empty]
- Primary Group: [Empty]
- Address...: [Empty]
- Business: [Dropdown]
- Mailing Address:
- Flag for Deletion:
- Business: [Dropdown]
- Home: [Dropdown]
- Business Fax: [Dropdown]
- Mobile: +1 (780) 382-0808
- E-mail: jbothwell@hotmail.com.usa
- Web Page Address: [Empty]
- Mail Server: [Empty]

At the bottom, there is a navigation bar with tabs for Notes, Groups, Companies, Contacts, Users, Teams, Appointments, Tasks, Journals, Documents, E-Mail, Opportunities, and Projects.

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

The screenshot shows a web application window titled "Jim Bothwell - Contact" with a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar. The "Profile" tab is active. The form contains the following fields:

- Full Name: Jim Bothwell
- File As: Bothwell, Jim
- Contact Type: (empty dropdown)
- Contact Status: (empty dropdown)
- Company ID: (empty text box)
- Group ID: (empty text box)
- Contact ID: 04937804-3638-40BF-B1FD-11E4BC2F81
- Territory Code: (empty dropdown)
- Mailing List: No Mail:
- Birthday: 14/01/2006
- Marital Status: (empty dropdown)
- Spouse's Name: (empty text box)
- Anniversary: 14/01/2006
- Children's Names: (empty text box)
- Categories: Category 1, Category 2, Category 3
- Interests: Golf, Motor Racing, Rugby, Soccer

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:

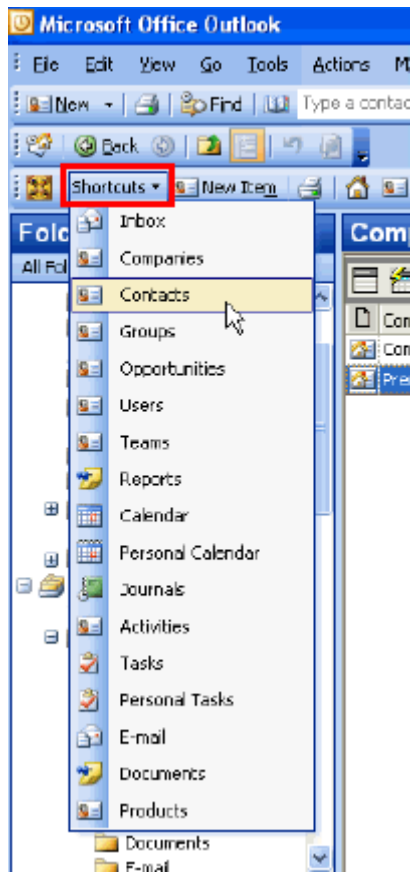
Name:	Barney Anderson
Company:	Premier Foods
Title:	IT Manager
Business Telephone:	+1 (206) 555-8411
Business Fax:	+1 (206) 555-6687
Address:	305 14th Ave. Suite B, Seattle, WA, 98128
E-Mail:	barneya@premierfoods.com.usa
Web Page Address:	www.premierfoods.com.usa

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

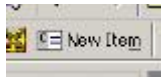
Interests:	Golf, Tennis
-------------------	---------------------

Basic Steps:

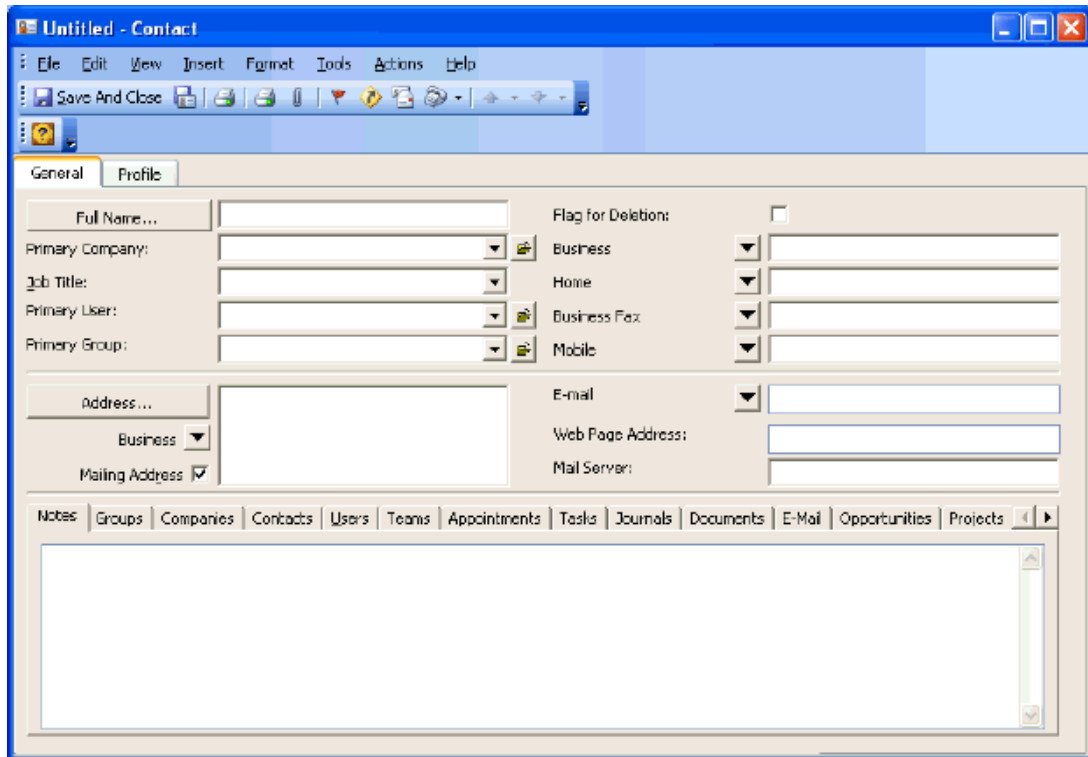
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



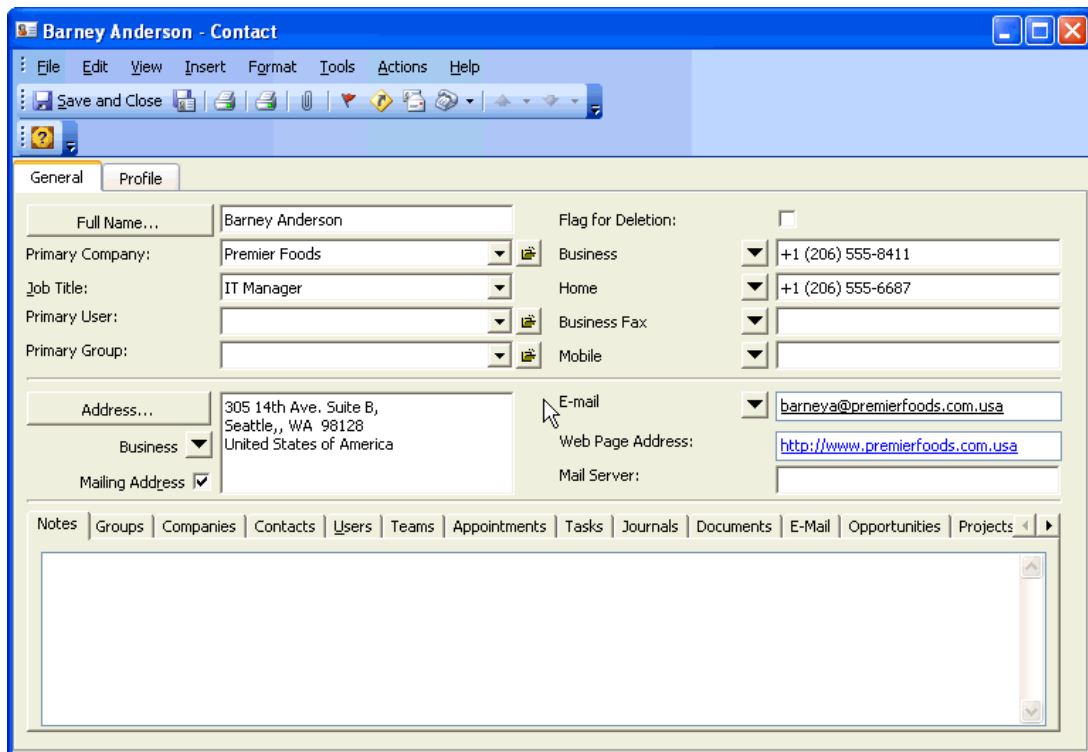
2. Click on **New Item** (Contact) on the MX-Contact Toolbar:



3. A blank Contact Form will be displayed:



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



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

The screenshot shows a software window titled "Barney Anderson - Contact". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into two tabs: "General" and "Profile". The "Profile" tab is selected. The form contains the following fields and controls:

- Full Name: Text box containing "Barney Anderson"
- File As: Dropdown menu showing "Anderson, Barney"
- Contact Type: Dropdown menu
- Contact Status: Dropdown menu
- Company ID: Text box
- Group ID: Text box
- Contact ID: Text box containing "2476F4EE-385A-4DD2-BDA4-E477B357E"
- Territory Code: Dropdown menu
- Mailing List: Two checkboxes, one labeled "No Mail"
- Birthday: Calendar icon and dropdown menu showing "14/01/2006"
- Marital Status: Dropdown menu
- Spouse's Name: Text box
- Anniversary: Calendar icon and dropdown menu showing "14/01/2006"
- Children's Names: Text box
- Categories: List box with three items: "Category 1", "Category 2", and "Category 3", each with an unchecked checkbox.
- Interests: List box with four items: "Motor Racing", "Rugby", "Soccer", and "Tennis". The "Tennis" item is checked.

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:

The screenshot shows the 'Barney Anderson - Contact' form. The 'General' tab is selected, displaying the following information:

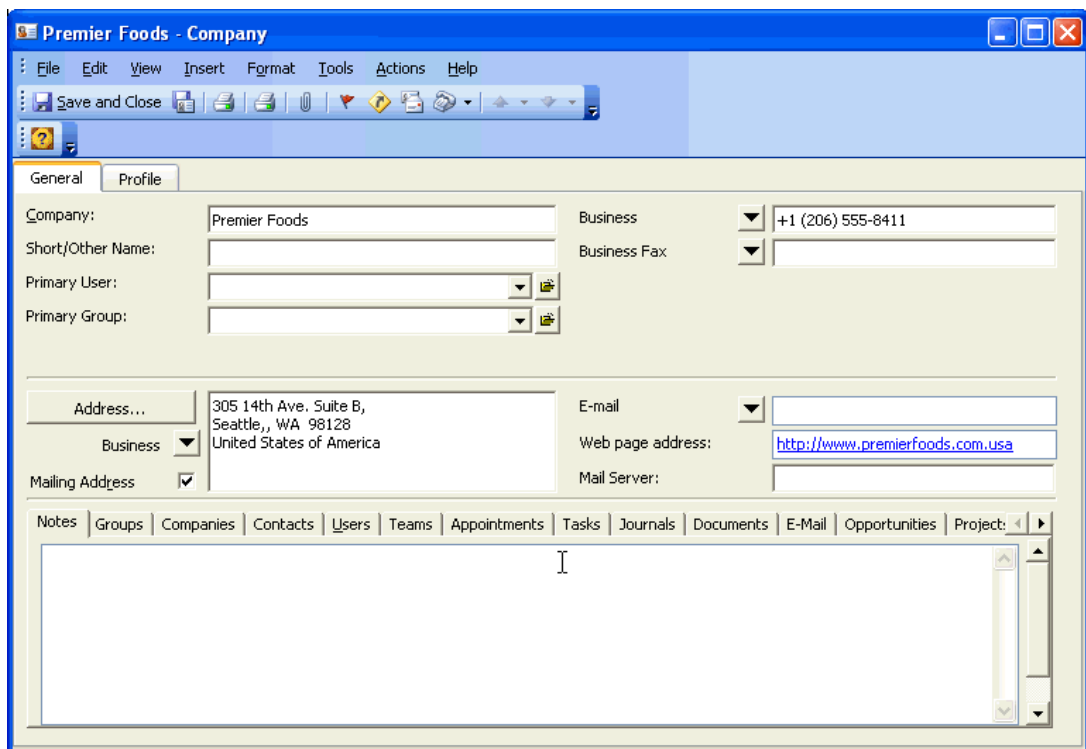
- Full Name...**: Barney Anderson
- Primary Company**: Premier Foods
- Job Title**: IT Manager
- Primary User**: [Empty]
- Primary Group**: [Empty]
- Address...**: 305 14th Ave, Suite B, Seattle, WA 98128, United States of America
- E-mail**: barneva@premierfoods.com.usa
- Web Page Address**: http://www.premierfoods.com.usa

The 'Companies' tab is selected in the toolbar, and the 'MX-Contact' table is visible with columns for Company, Business Phone, Business Fax, Industry, Company Type, Company Status, Turnover, and Employees. The table currently shows 0 items.

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



- 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):



- Complete the details for **Premier Foods** on the **Profile** Tab:

General Profile

Company: Premier Foods Company ID: 4089CCD2-7E6A-4416-9695-C1934FC6525F
 Legal/Commercial Name: Group ID:
 Company Registration No:
 VAT/Tax Registration No:
 Customer No:

Industry: Hotel/Restaurant Categories: Category 1
 Territory ID: Category 2
 Company Type: Prospect Category 3
 Company Status:
 Turnover: 0
 No Employees: 0

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

General Profile

Full Name... Barney Anderson Flag for Deletion:
 Primary Company: Premier Foods Business +1 (206) 555-8411
 Job Title: IT Manager Home +1 (206) 555-6687
 Primary User: Business Fax
 Primary Group: Mobile

Address... 305 14th Ave, Suite B, Seattle, WA 98128 E-mail: barneya@premierfoods.com.usa
 Business United States of America Web Page Address: http://www.premierfoods.com.usa
 Mailing Address Mail Server:

Notes Groups **Companies** Contacts Users Teams Appointments Tasks Journals Documents E-Mail Opportunities Projects

Company	Business Phone	Business Fax	Industry	Company Type	Company Status	Turnover	Employees
Premier Foods	+1 (206) 555-...		Hotel/Restaurant	Prospect		0	0

1 Items SQL View Version: 6.3.49

- 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](#))

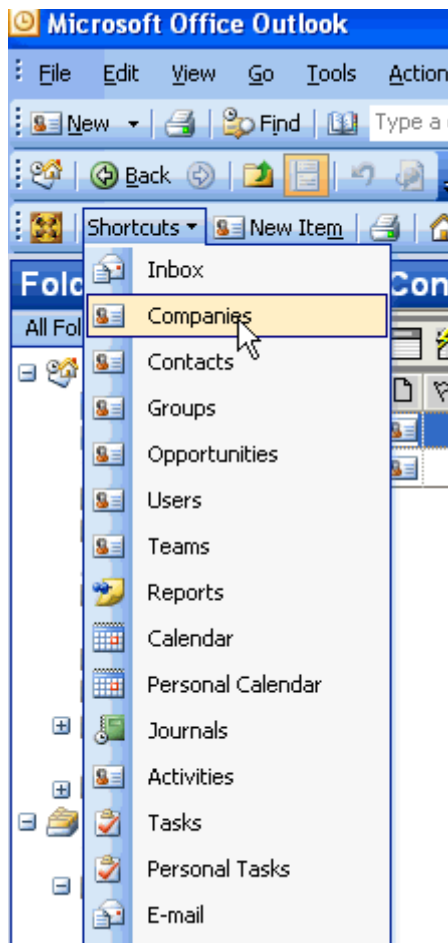
2.12 Adding a Contact from a Company : Solution

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

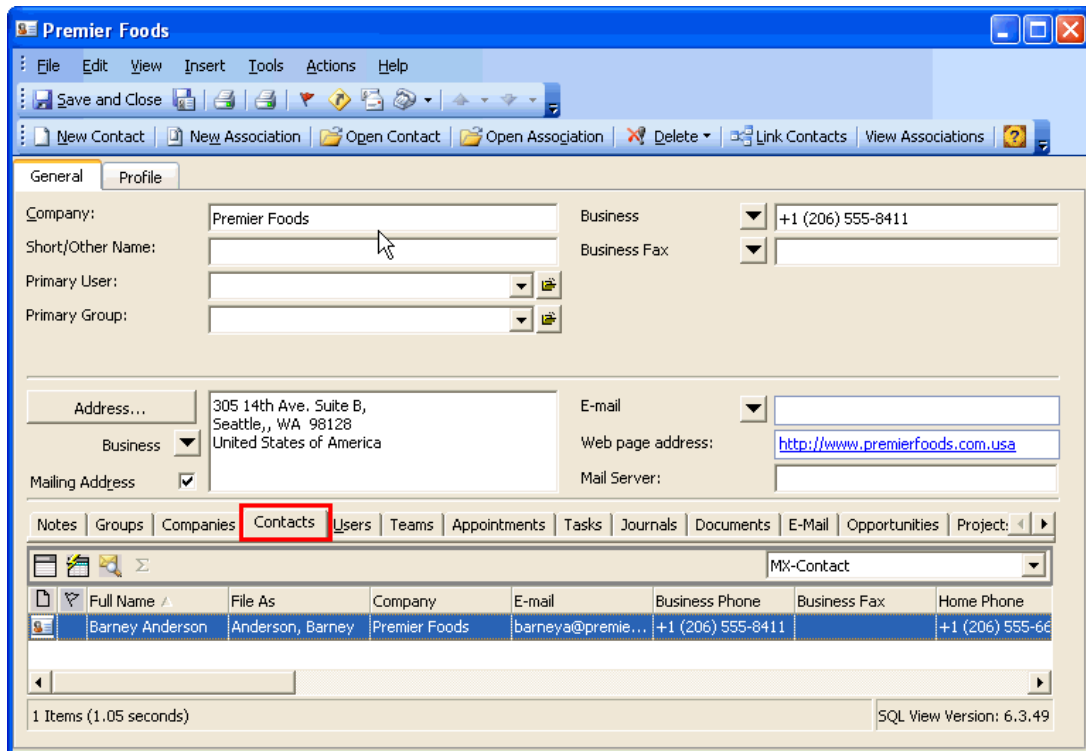
Name:	Gillian Meyer
Job Title:	VP - Information Systems
E-Mail:	gillianm@premierfoods.com.usa

Basic Steps:

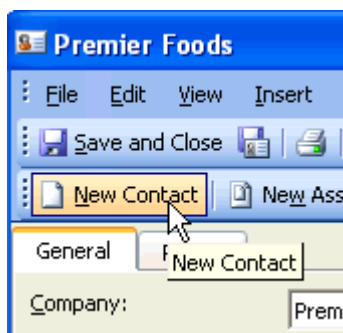
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



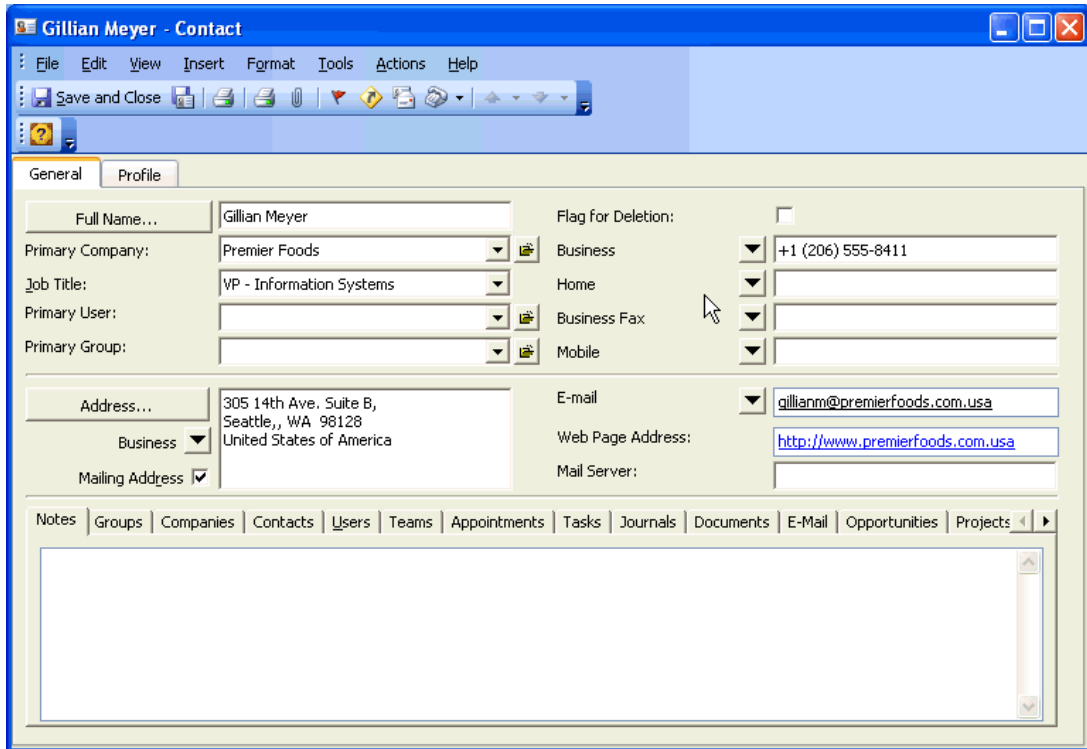
2. Open the Company **Premier Foods**
3. Click on the **Contacts** Tab:



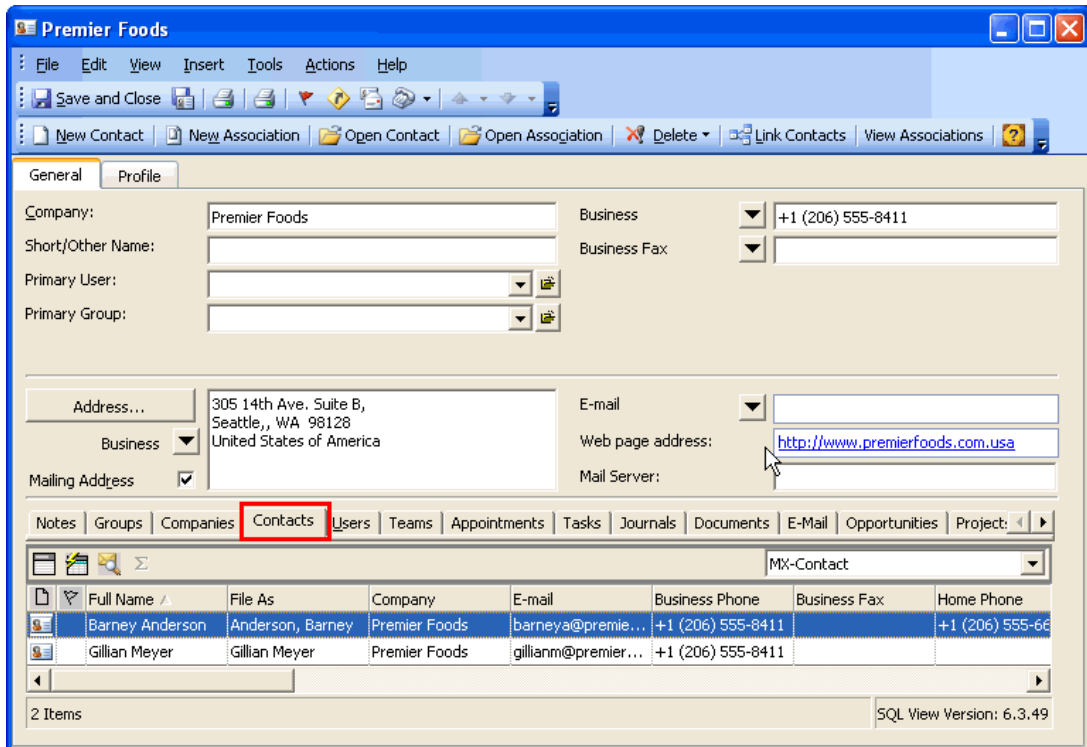
- Click on **New Contact** to add the contact:



- 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](#))

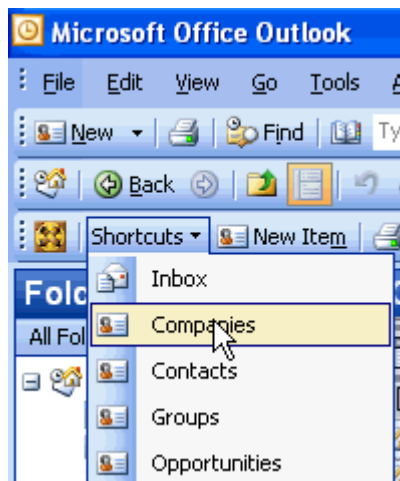
2.14 Associating a Company to a Contact : Solution

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

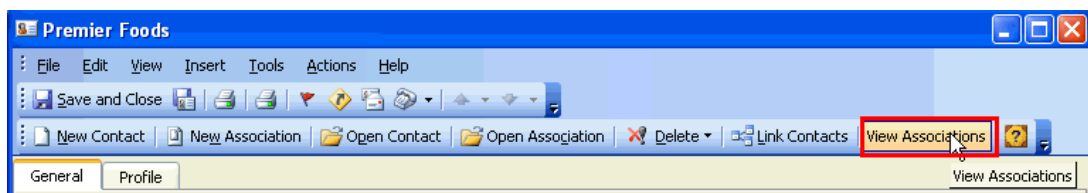
Associating Company:	Premier Foods
Relationship:	Client
Associated Contact:	Jim Bothwell
Relationship:	Consultant

Basic Steps:

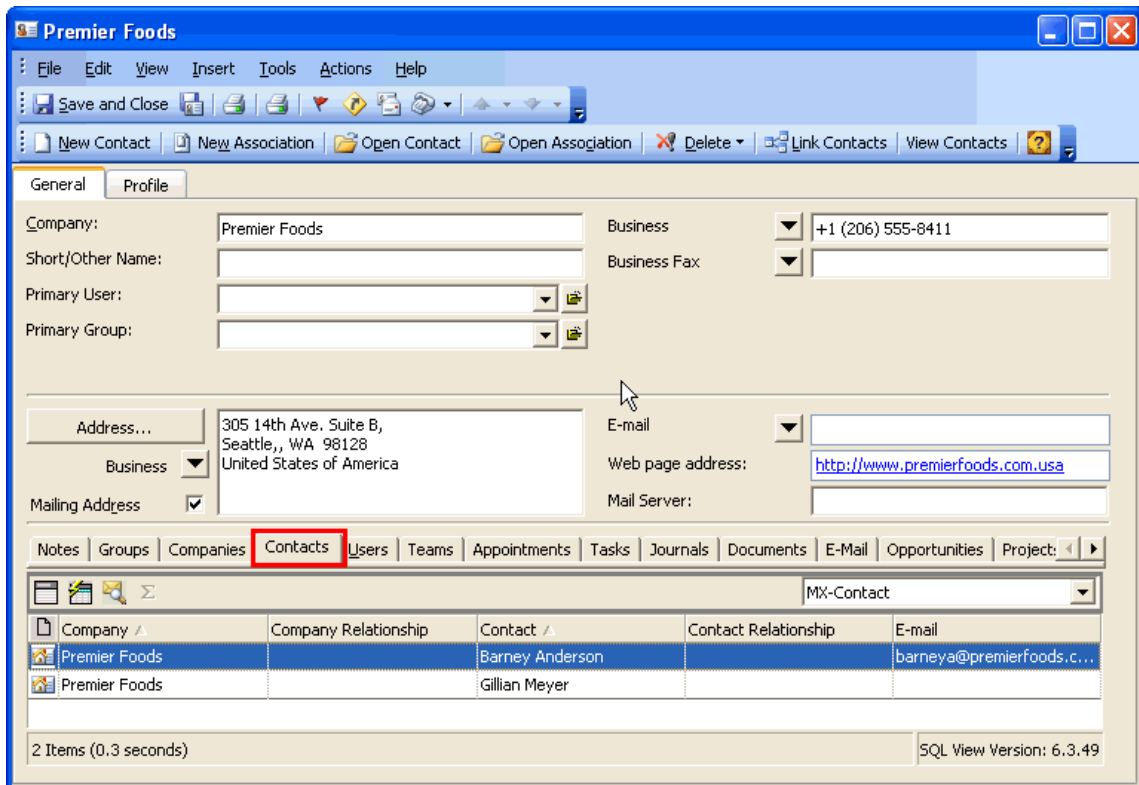
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



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



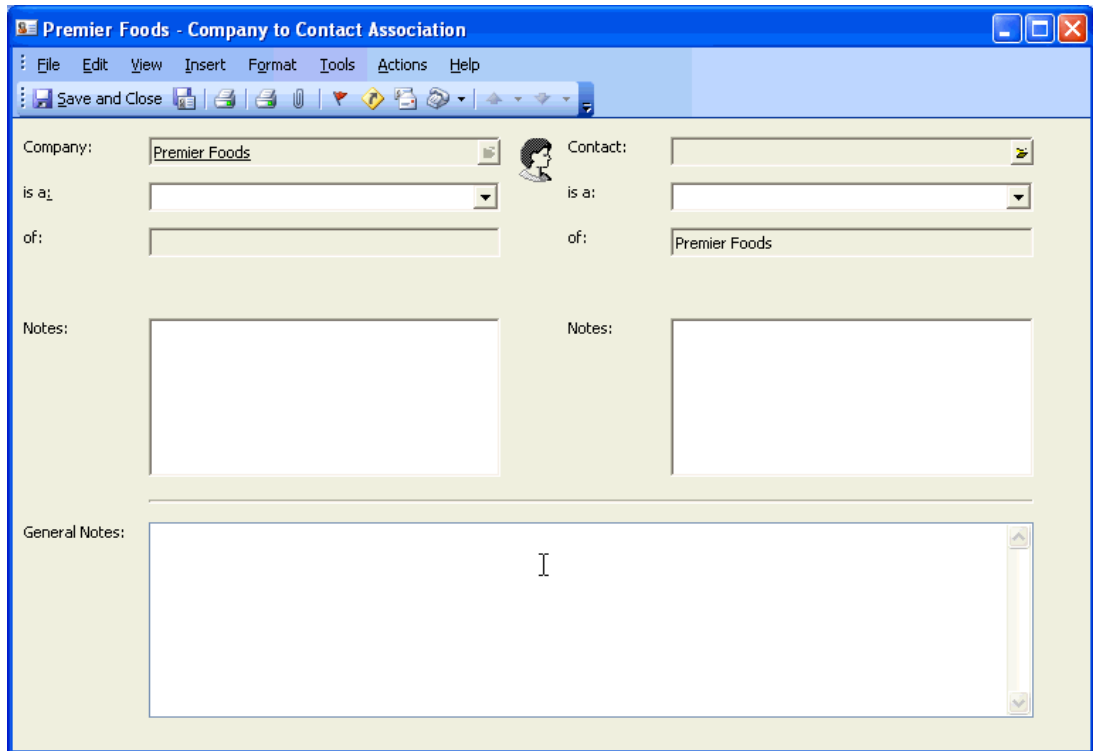
5. The **Company to Contact Associations** will be displayed on the Contacts Tab.



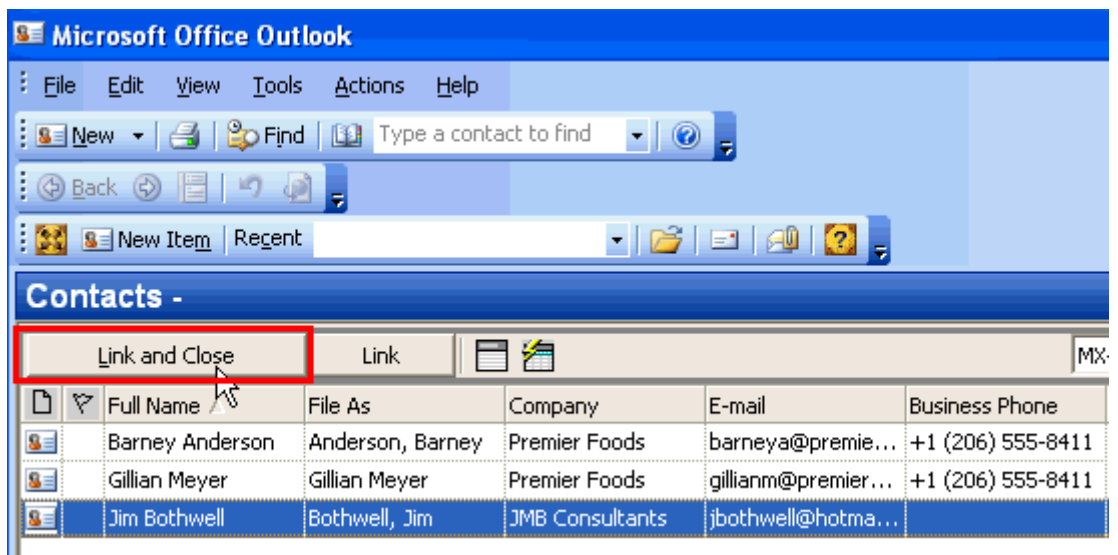
6. Click on **New Association**.



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

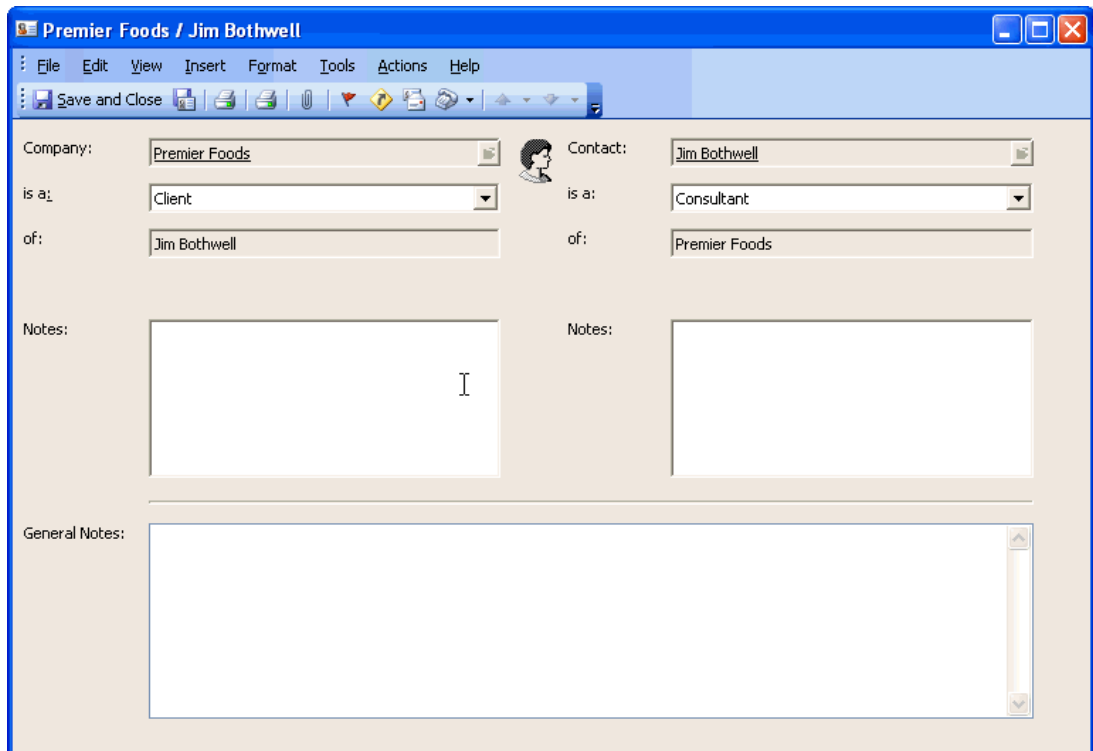


8. Highlight **Jim Bothwell**:

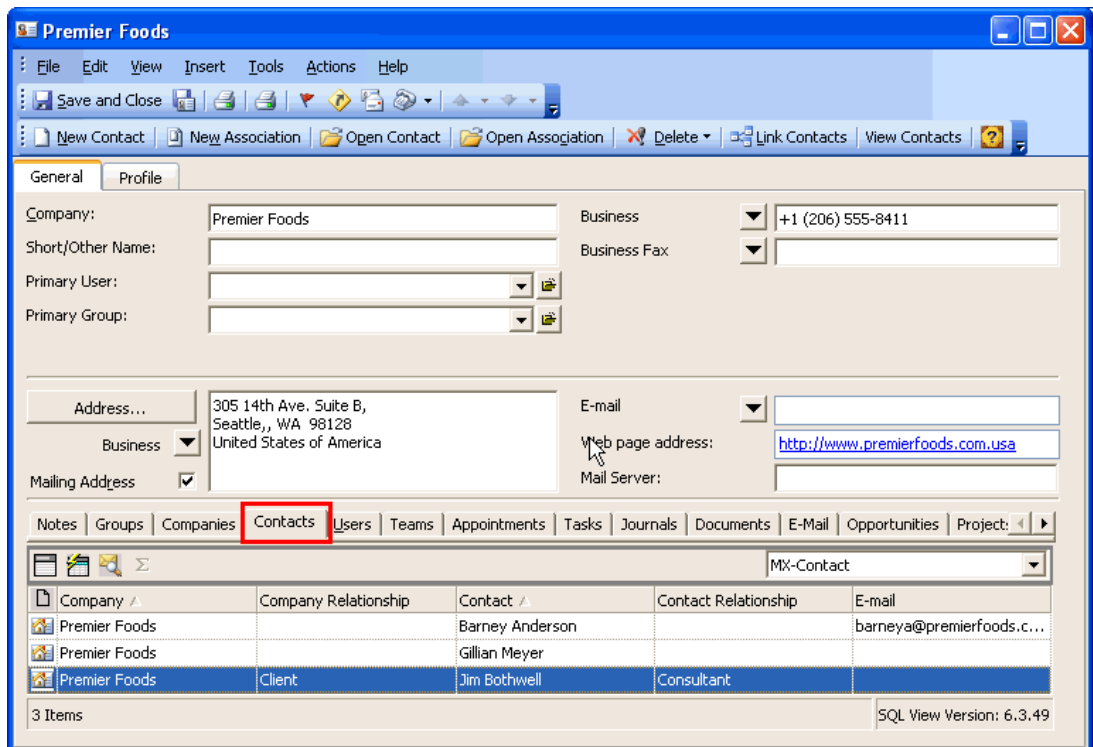


9. Click **Link and Close** (button shown above).

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

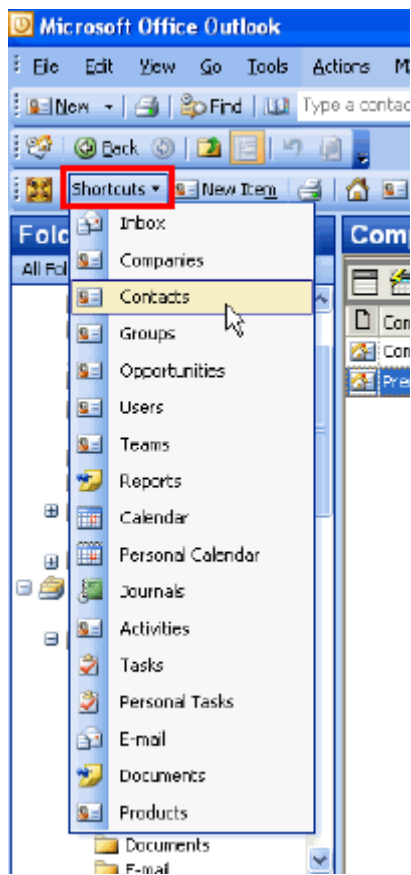
Complete the following information on the **Profile** tab:

Interests:	Golf
-------------------	-------------

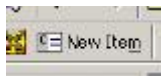
Link the contact **Johnny Walker** to the company **Compaq Corporation (Seattle)**.

Basic Steps:

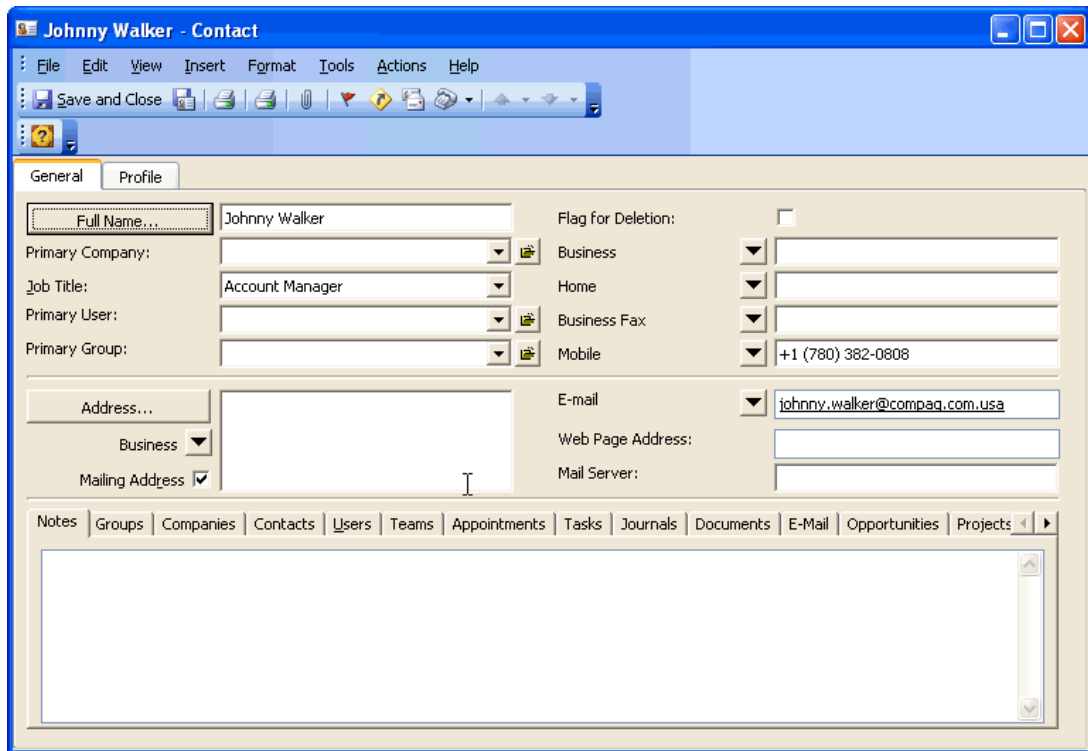
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



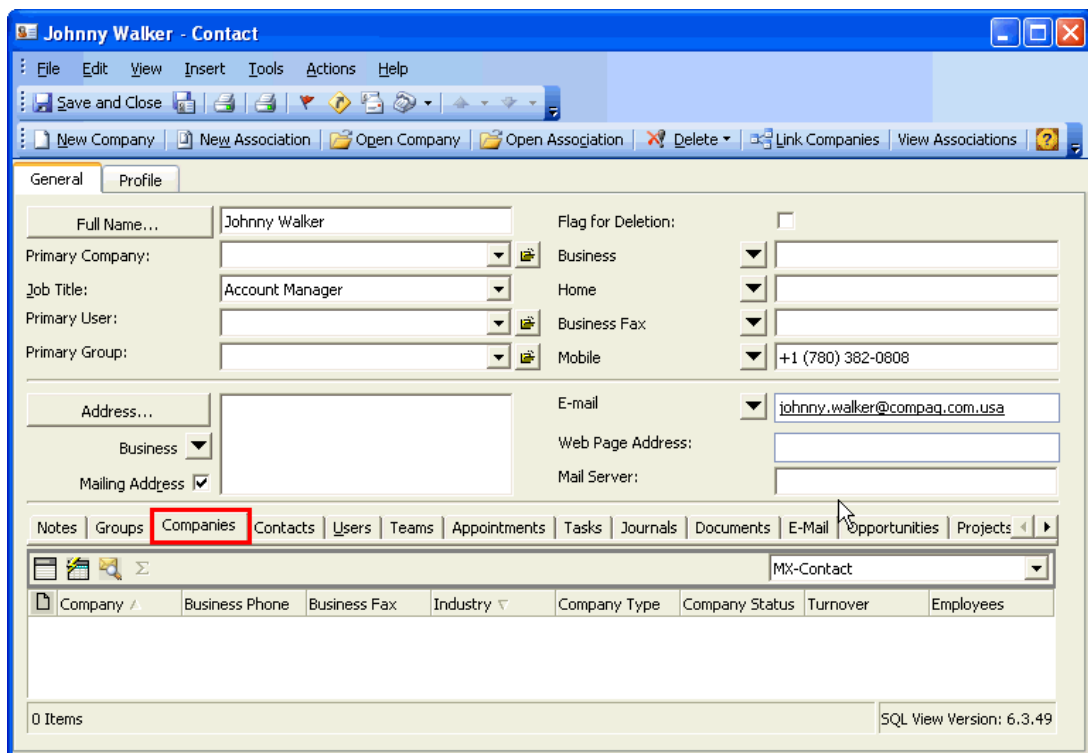
2. Click on **New Item** (Contact) on the MX-Contact Toolbar:



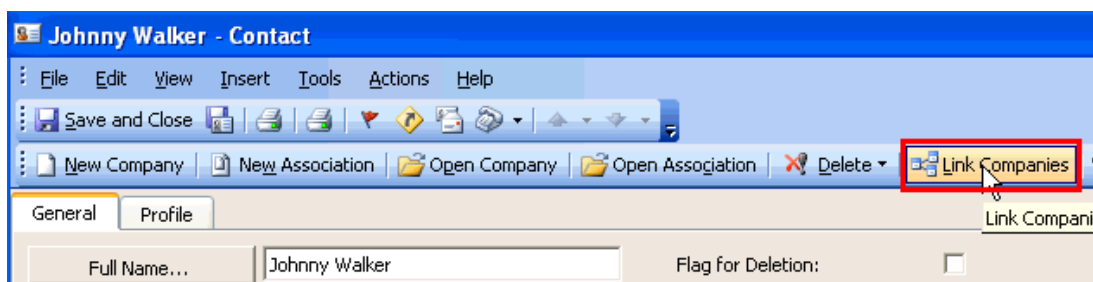
3. Enter the details for **Johnny Walker** (**Note:** type in **Account Manager** under **Job Title**):



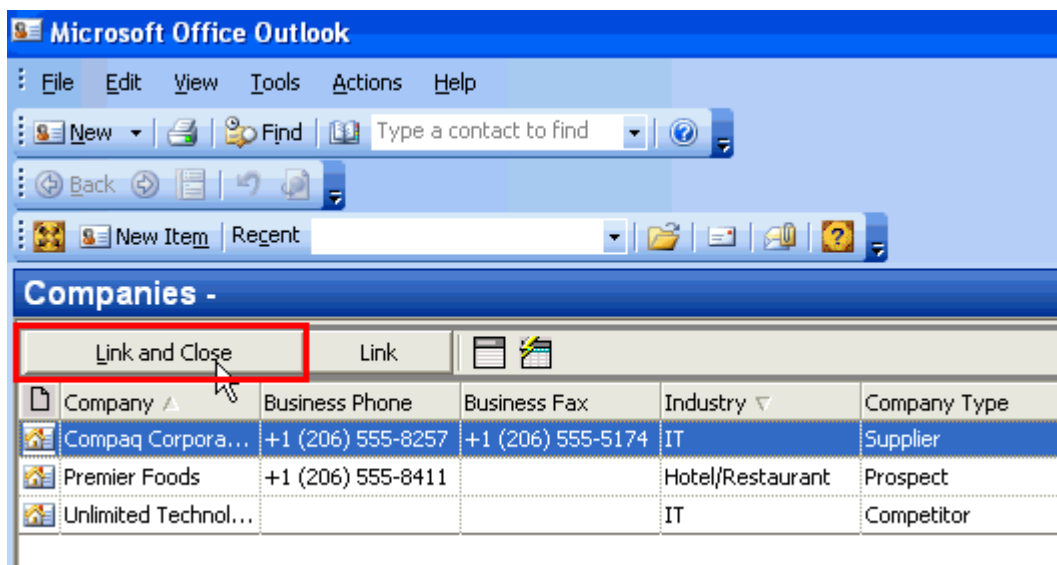
4. Click on the **Companies** Tab.



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:

Johnny Walker

File Edit View Insert Tools Actions Help

Save and Close

New Company New Association Open Company Open Association Delete Link Companies View Associations

General Profile

Full Name... Johnny Walker Flag for Deletion:

Primary Company: Compaq Corporation (Seattle) Business

Job Title: Account Manager Home

Primary User: Business Fax

Primary Group: Mobile +1 (780) 382-0808

Address... E-mail johnny.walker@compaq.com.usa

Business Web Page Address:

Mailing Address Mail Server:

Notes Groups **Companies** Contacts Users Teams Appointments Tasks Journals Documents E-Mail Opportunities Projects

MX-Contact

Company	Business Phone	Business Fax	Industry	Company Type	Company Status	Turnover
Compaq Corpora...	+1 (206) 555-8257	+1 (206) 555-5174	IT	Supplier		0

1 Items (0.49 seconds) SQL View Version: 6.3.49

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](#))

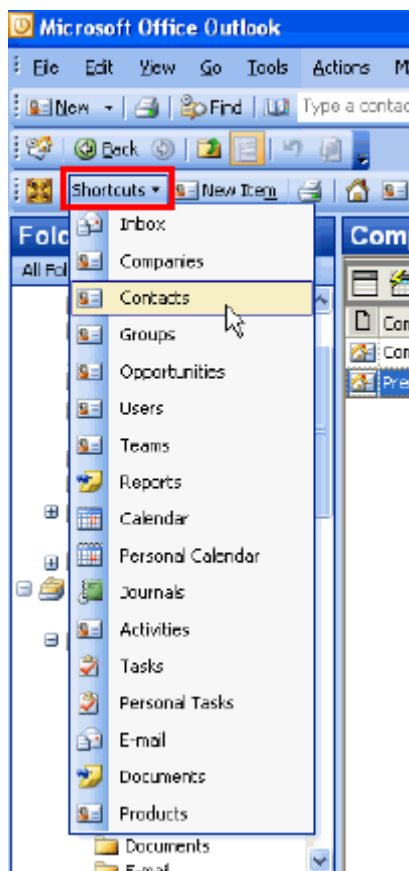
2.18 Associating a Contact to another Contact : Solution

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:**

Gillian Meyer

File Edit View Insert Tools Actions Help

Save and Close

New Contact **New Association** Open Contact Open Association

General Profile **New Contact Association**

Full Name... Gillian Meyer Flag for

Primary Company: Premier Foods Business

Job Title: VP - Information Systems Home

Primary User: Business

Primary Group: Mobile


Address... 305 14th Ave. Suite B, Seattle, WA 98128 E-mail
Business United States of America Web Pa
Mailing Address Mail Serv

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

Gillian Meyer - Contact to Contact Association

File Edit View Insert Format Tools Actions Help

Save and Close

Associating Contact: Gillian Meyer Associated Contact: 

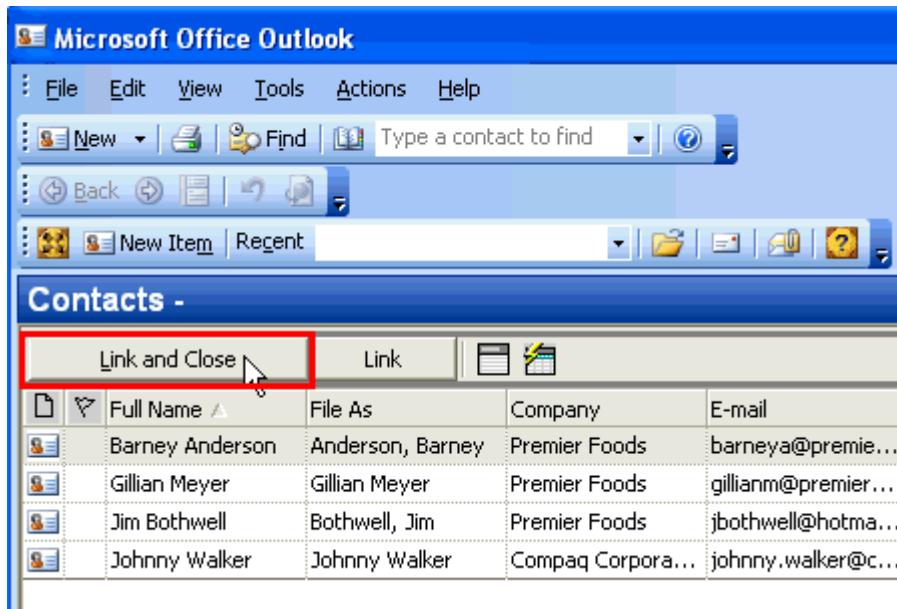
is a: is a:

of: of: Gillian Meyer

Notes:

General Notes:

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



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

Associating Contact: Associated Contact:

is a: is a:

of: of:

Notes:

Notes:

General Notes:

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

The screenshot shows the MX-Contact software interface. The window title is "Gillian Meyer". The menu bar includes File, Edit, View, Insert, Tools, Actions, and Help. The toolbar contains buttons for Save and Close, New Contact, New Association, Open Contact, Open Association, Delete, Link Contacts, and View Associations. The main form is divided into "General" and "Profile" tabs. The "General" tab is active, showing fields for Full Name (Gillian Meyer), Primary Company (Premier Foods), Job Title (VP - Information Systems), Primary User, Primary Group, Address (305 14th Ave, Suite B, Seattle, WA 98128, United States of America), E-mail (gillianm@premierfoods.com.usa), Web Page Address (http://www.premierfoods.com.usa), and Mail Server. A "Contacts" tab is highlighted in the navigation bar. Below the form, a table displays contact information for Barney Anderson.

Full Name	File As	Company	E-mail	Business Phone	Business Fax	Home Phone
Barney Anderson	Anderson, Barney	Premier Foods	barneya@premie...	+1 (206) 555-8411		+1 (206) 555-66

1 Items SQL View Version: 6.3.49

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](#))

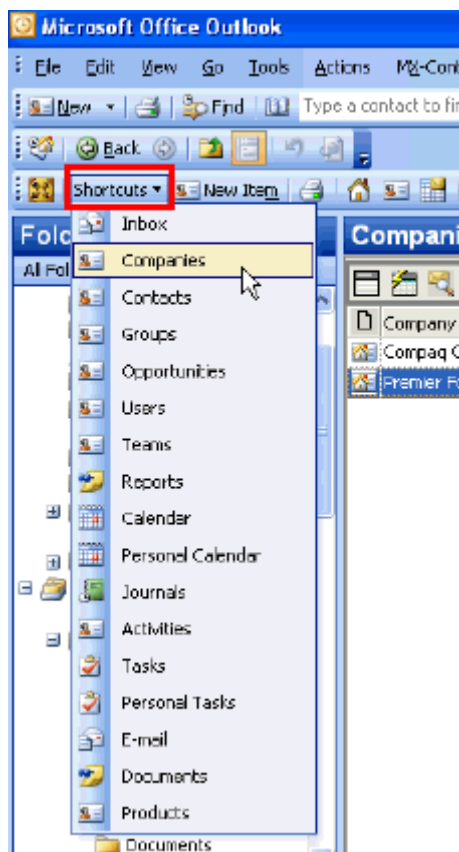
2.20 Associating a Company to another Company : Solution

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:



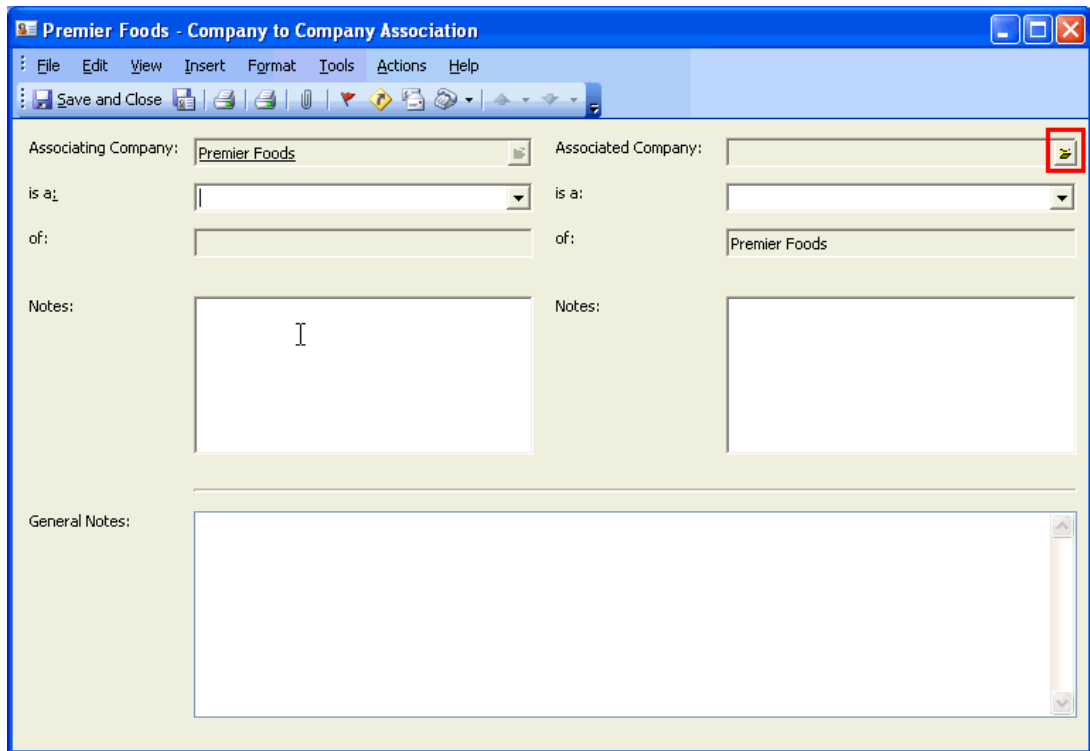
2. Double click on **Premier Foods** to open the record.
3. Click on the **Companies** Tab:

The screenshot shows the 'Premier Foods' contact form in the MX-Contact application. The window title is 'Premier Foods'. The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains icons for Save and Close, Print, Copy, Paste, Undo, Redo, and other standard functions. The form is divided into two tabs: 'General' and 'Profile'. The 'General' tab is active, showing fields for Company (Premier Foods), Short/Other Name, Primary User, Primary Group, Business (+1 (206) 555-8411), Business Fax, Address (305 14th Ave. Suite B, Seattle, WA 98128, United States of America), E-mail, Web page address (http://www.premierfoods.com.usa), and Mailing Address (checked). Below the form is a navigation bar with tabs for Notes, Groups, Companies, Contacts, Users, Teams, Appointments, Tasks, Journals, Documents, E-Mail, Opportunities, and Project.

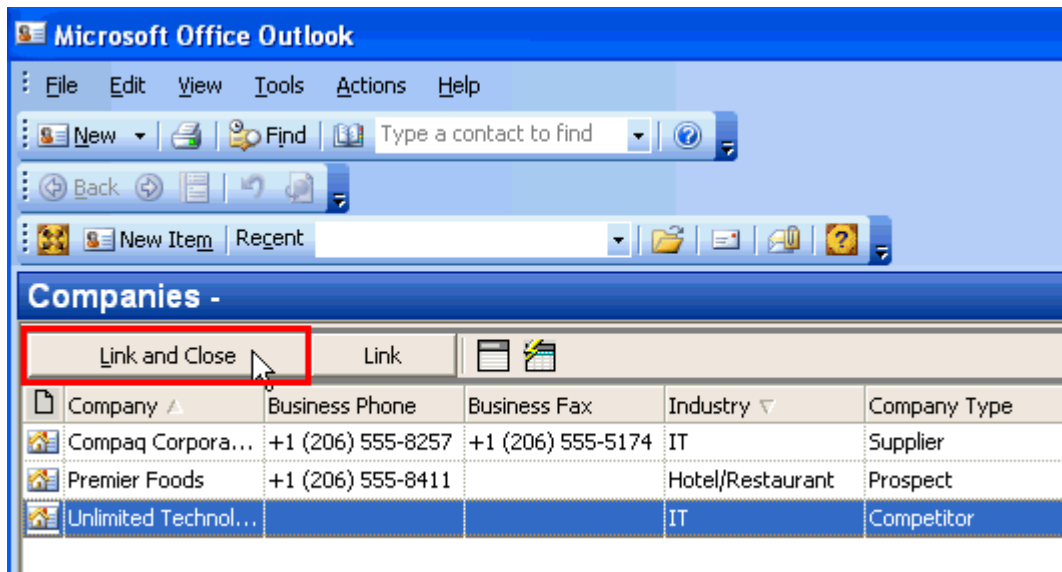
4. Click on **New (Company) Association**:

The screenshot shows the 'Premier Foods' contact form in the MX-Contact application. The window title is 'Premier Foods'. The menu bar includes File, Edit, View, Insert, Tools, Actions, and Help. The toolbar contains icons for Save and Close, Print, Copy, Paste, Undo, Redo, and other standard functions. The form is divided into two tabs: 'General' and 'Profile'. The 'General' tab is active, showing fields for Company (Premier Foods), Short/Other Name, Primary User, Primary Group, Business, and Business Fax. The 'New Association' button is highlighted with a red box. Below the form is a navigation bar with tabs for Notes, Groups, Companies, Contacts, Users, Teams, Appointments, Tasks, Journals, Documents, E-Mail, Opportunities, and Project.

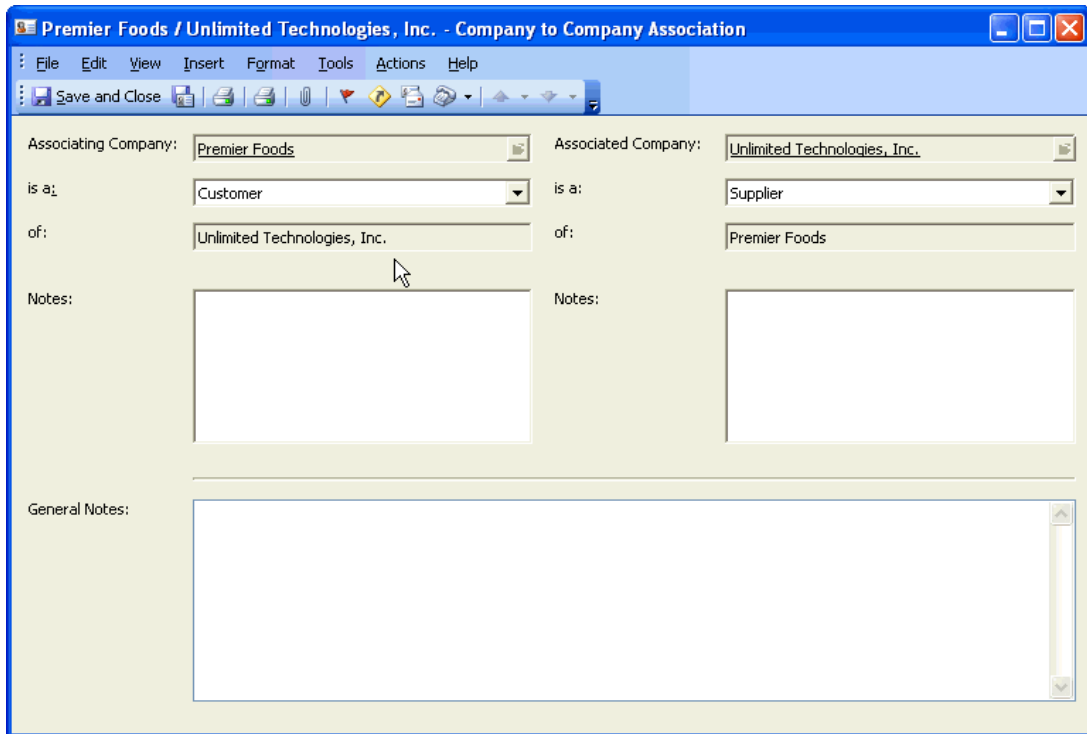
5. A new Company to Company Association Form will open. Click on the **(Associated Companies) Search** button on the Association Form:



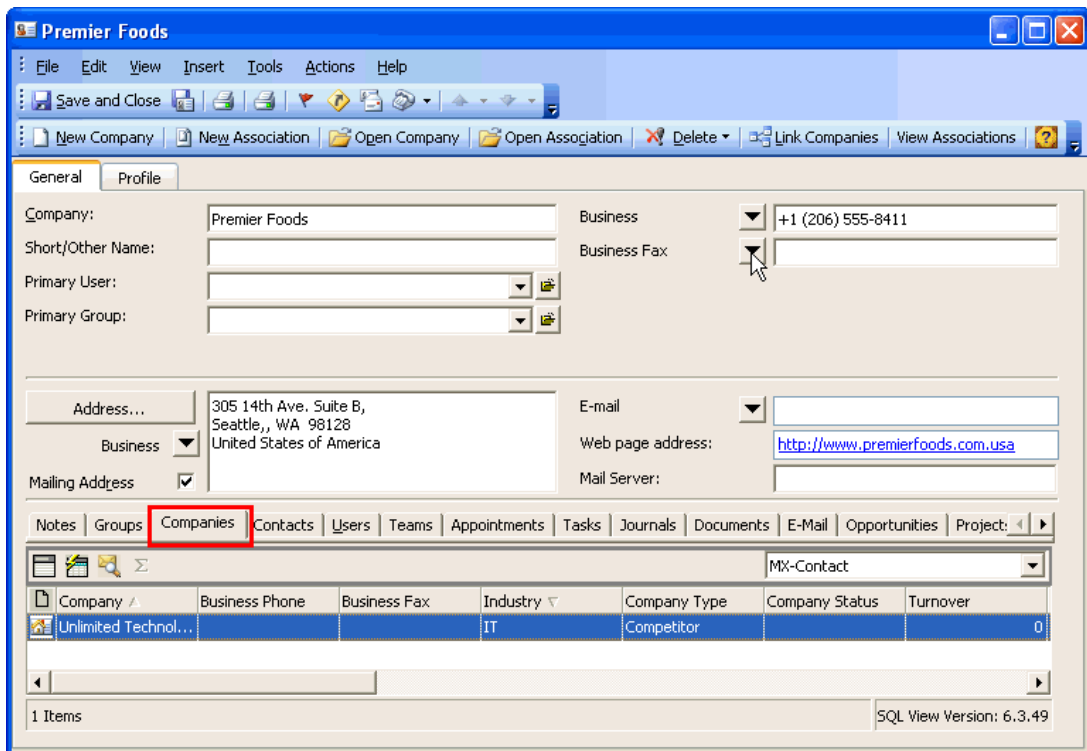
6. A **Companies** Search Window will open. Highlight **Unlimited Technologies**:



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

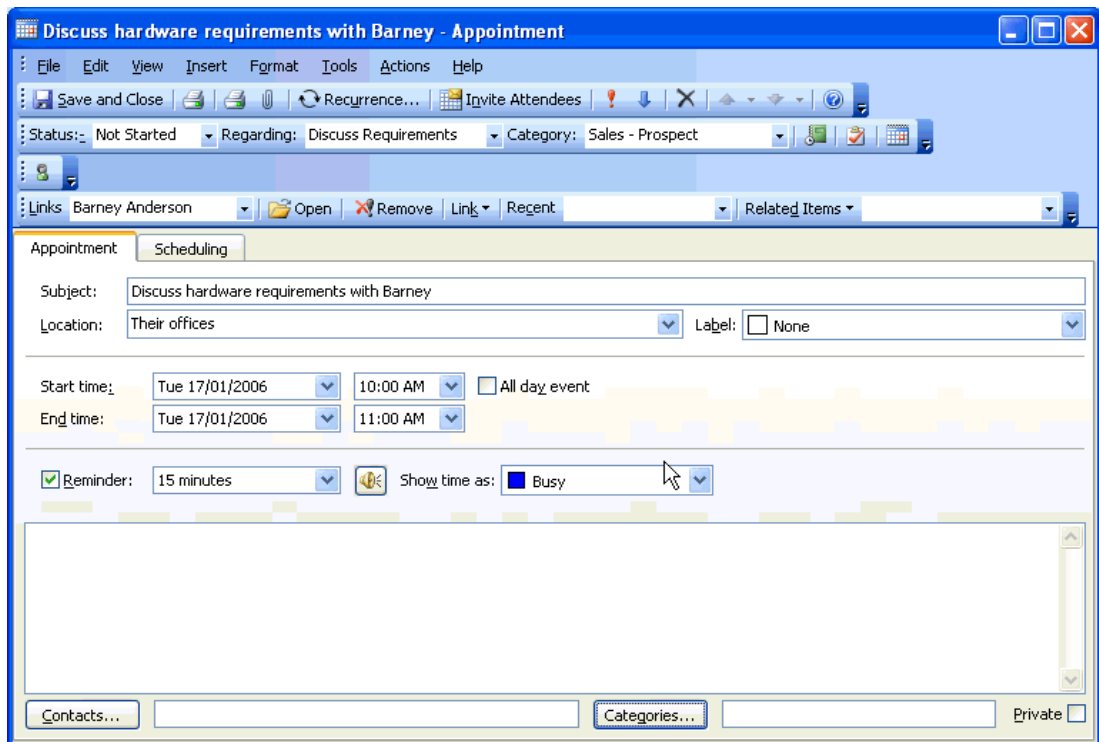
Basic Steps:

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

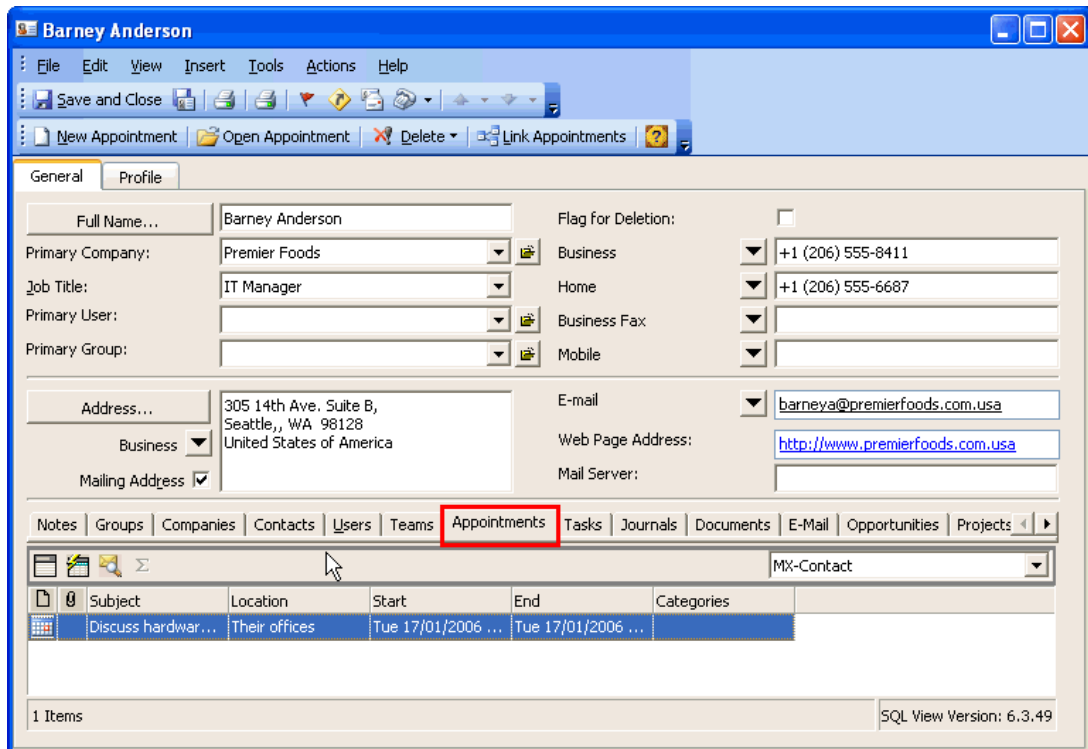
The screenshot shows the contact record for Barney Anderson. The toolbar at the top includes buttons for 'New Appointment', 'Open Appointment', 'Delete', and 'Link Appointments'. The 'New Appointment' button is highlighted with a red box. Below the toolbar, the contact details are displayed in a form with the following fields:

Full Name...	Barney Anderson	Flag for Deletion:	
Primary Company:	Premier Foods	Business	
Job Title:	IT Manager	Home	
Primary User:		Business Fax	
Primary Group:		Mobile	
Address...	305 14th Ave. Suite B, Seattle, WA 98128 United States of America	E-mail	
	Business	Web Page Address:	

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

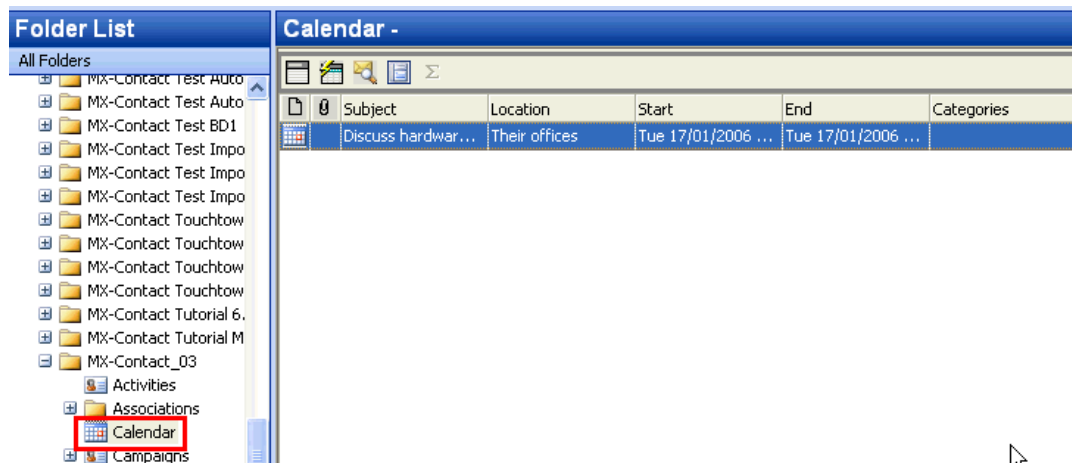
You have met with Barney Anderson as scheduled and now want to record the details of the visit. Journal Entries are used in MX-Contact to record these types of interactions with customers such as meetings, phone calls, etc.

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

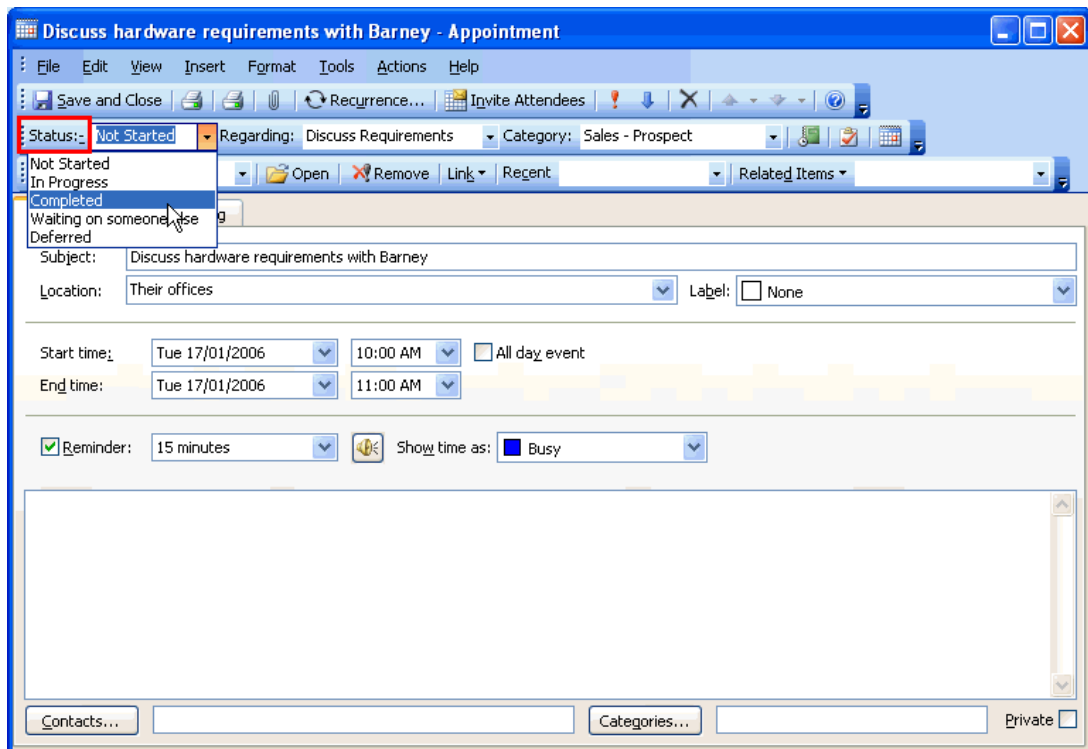
Subject:	Discuss hardware requirements with Barney
Entry Type:	Meeting
Memo:	Discussed their overall infrastructure and likely purchases over the next few months. They are buying from Unlimited Technologies but are unhappy with the service. Want us to give them a proposal.
Regarding:	Discuss Requirements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

Basic Steps:

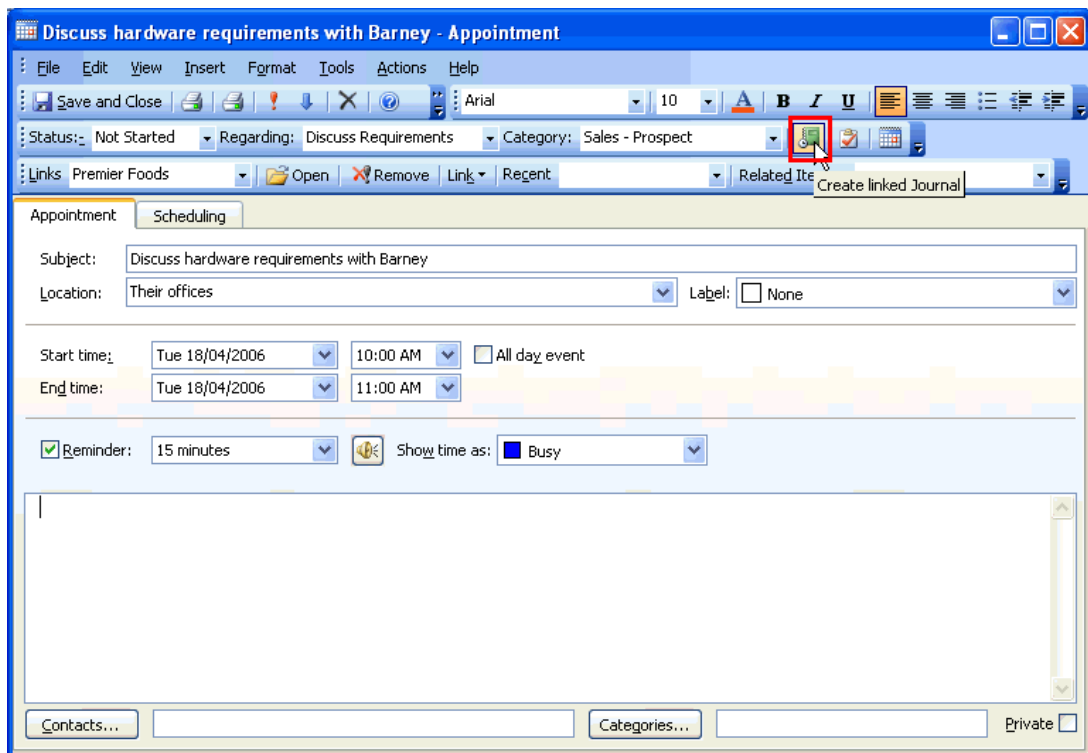
1. Open the Meeting in your Calendar:



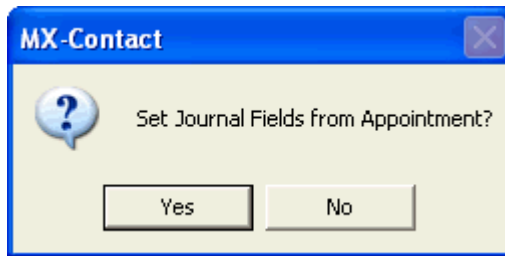
2. Change the **Status** to **Completed**:



3. Click on the Create Linked Journal button.



- The following prompt will appear:



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

A screenshot of a software window titled "Discuss hardware requirements with Barney - Journal". The window has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with various icons. Below the toolbar, there are several dropdown menus and buttons. The "Subject" field contains "Discuss hardware requirements with Barney". The "Entry type" is set to "Meeting" and the "Company" is "Premier Foods". The "Start time" is "Tue 18/04/2006" at "10:00 AM", with "Start Timer" and "Pause Timer" buttons. The "Duration" is "1 hour". A large text area contains the text: "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." At the bottom, there are buttons for "Contacts...", "Categories...", and a "Private" checkbox.

- Click **Save and Close** on the Journal Form.
- 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

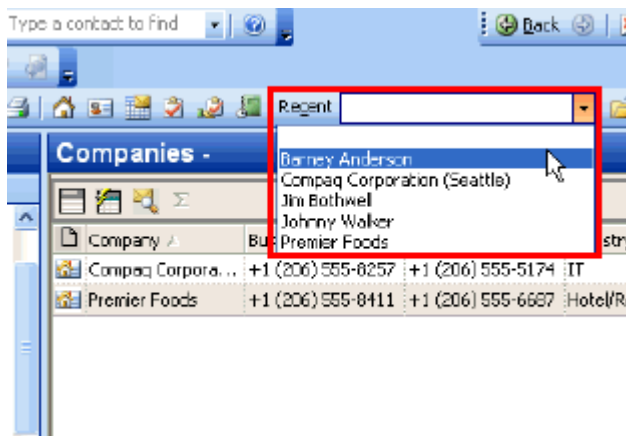
Create a Task to remind yourself to fax a proposal to **Barney Anderson** of **Premier Foods**.

Complete the following information on the Task:

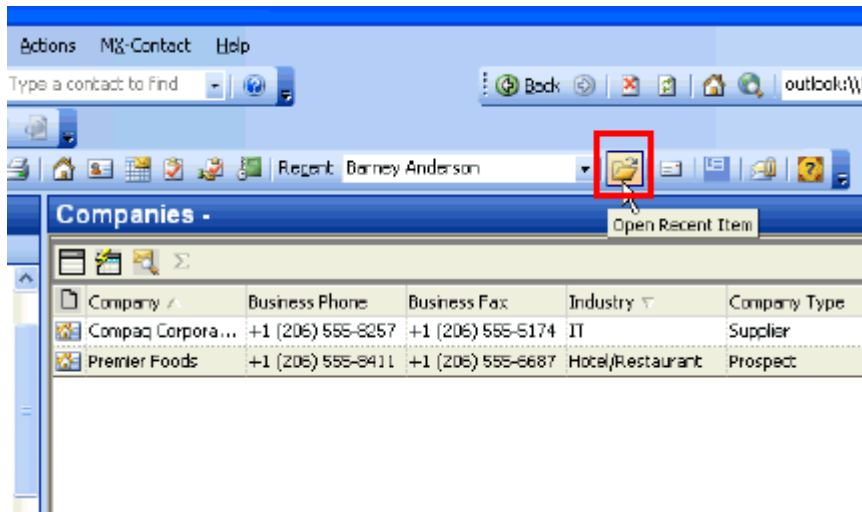
Subject:	Fax proposal to Barney
Due Date:	The following Thursday
Regarding:	Present/Review Proposal
Category:	Sales – Prospect

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**.



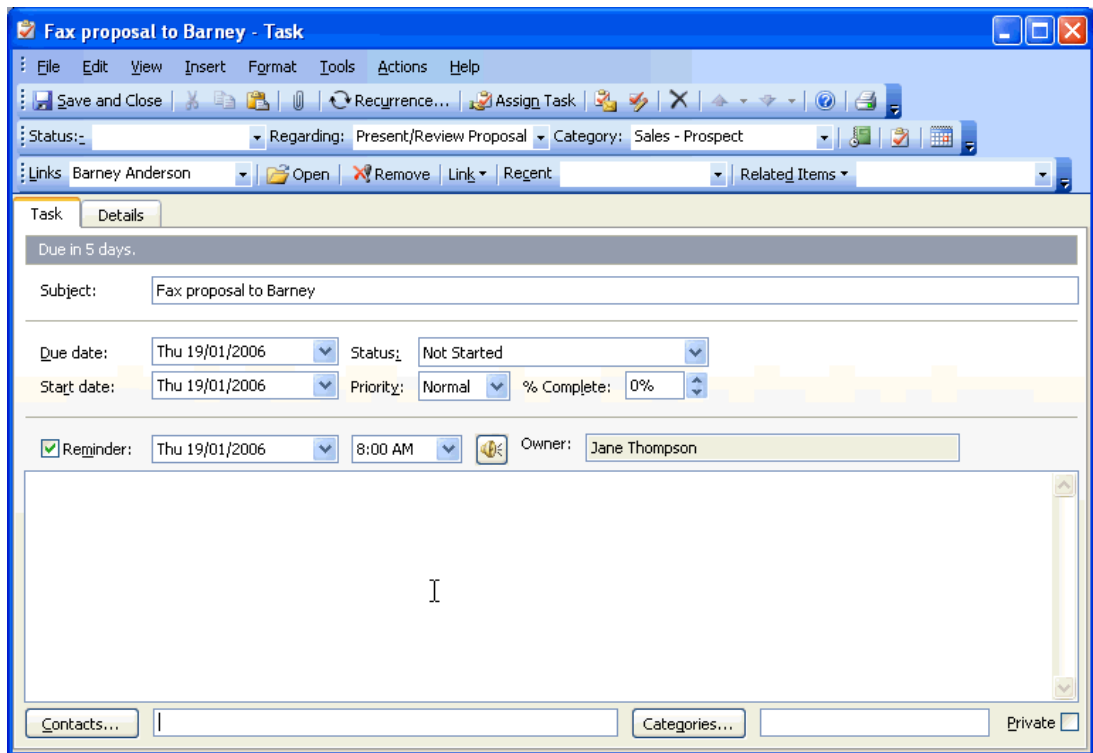
2. Click on the **Open Recent Item** button.



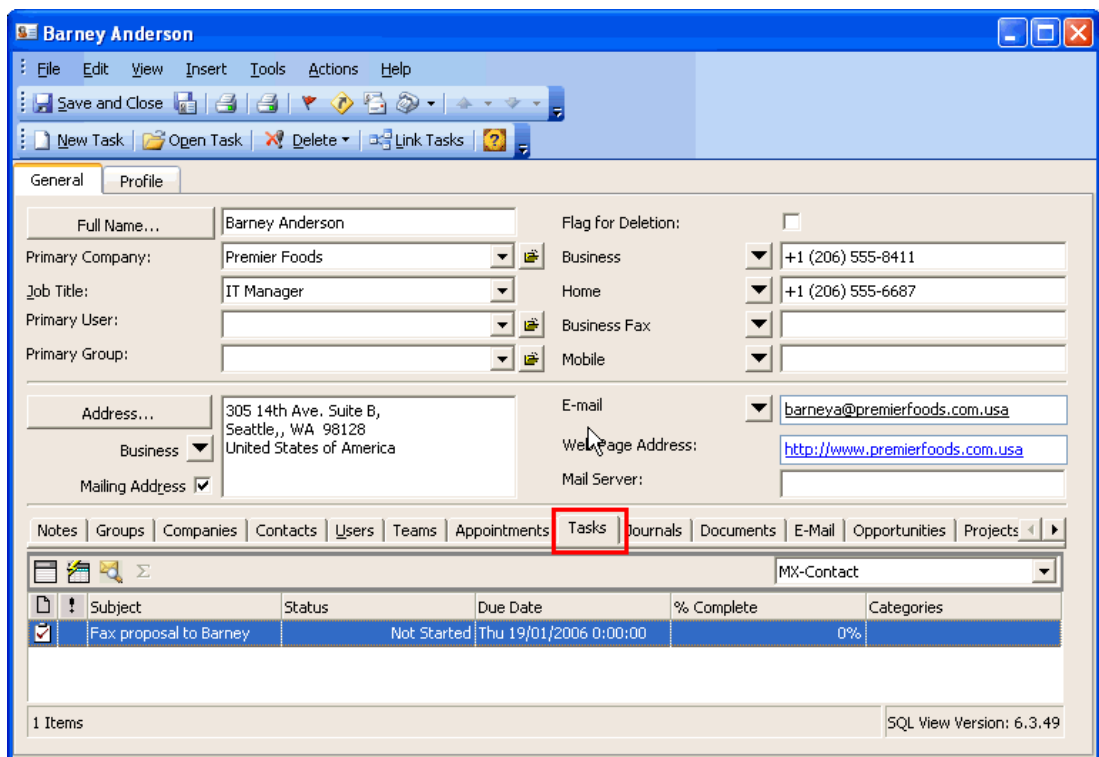
3. Once the Contact form has opened, click on the **Tasks** Tab.
4. Click on **New Task**.



5. Enter the Task Details:



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



- 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

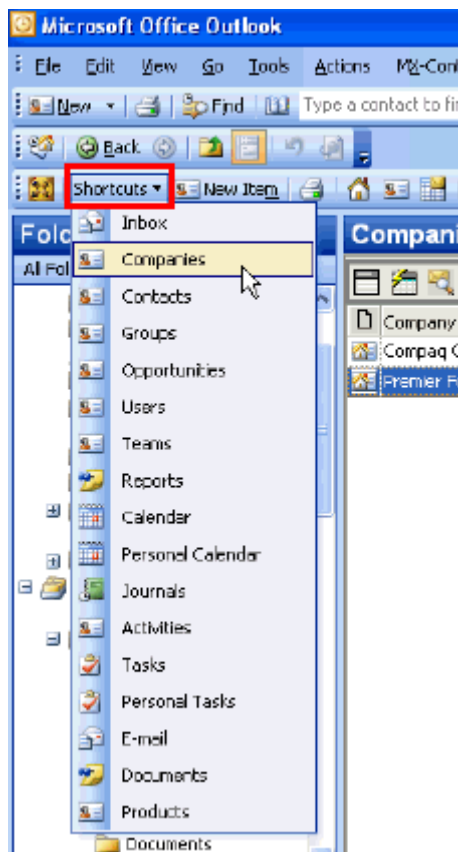
You are preparing a quotation for Premier Foods. You need to do some calculations in a costing sheet in Microsoft Excel.

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

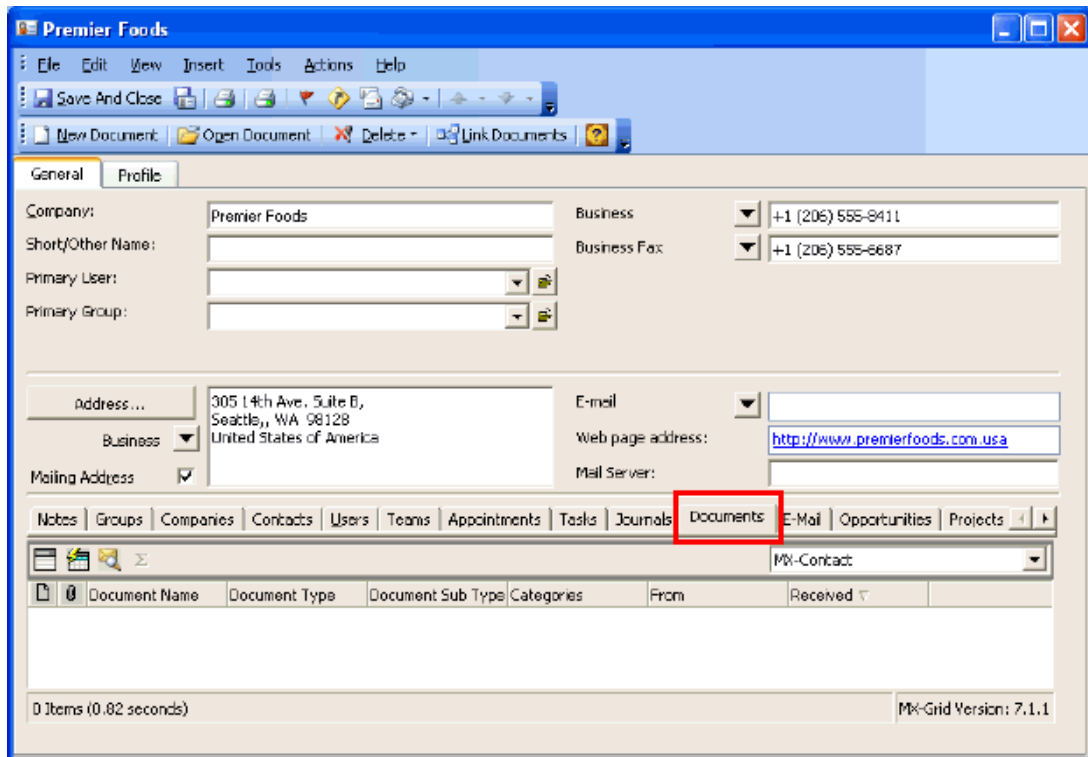
Attach this document to Premier Foods.

Basic Steps:

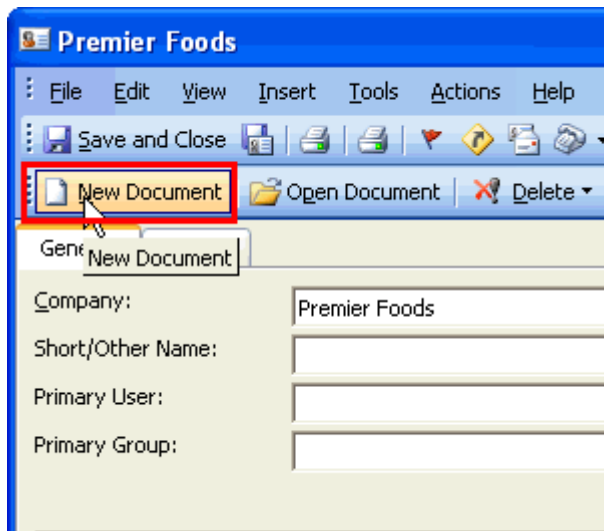
1. Create the spreadsheet file **Premier Foods Costing.xls** as described above.
2. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



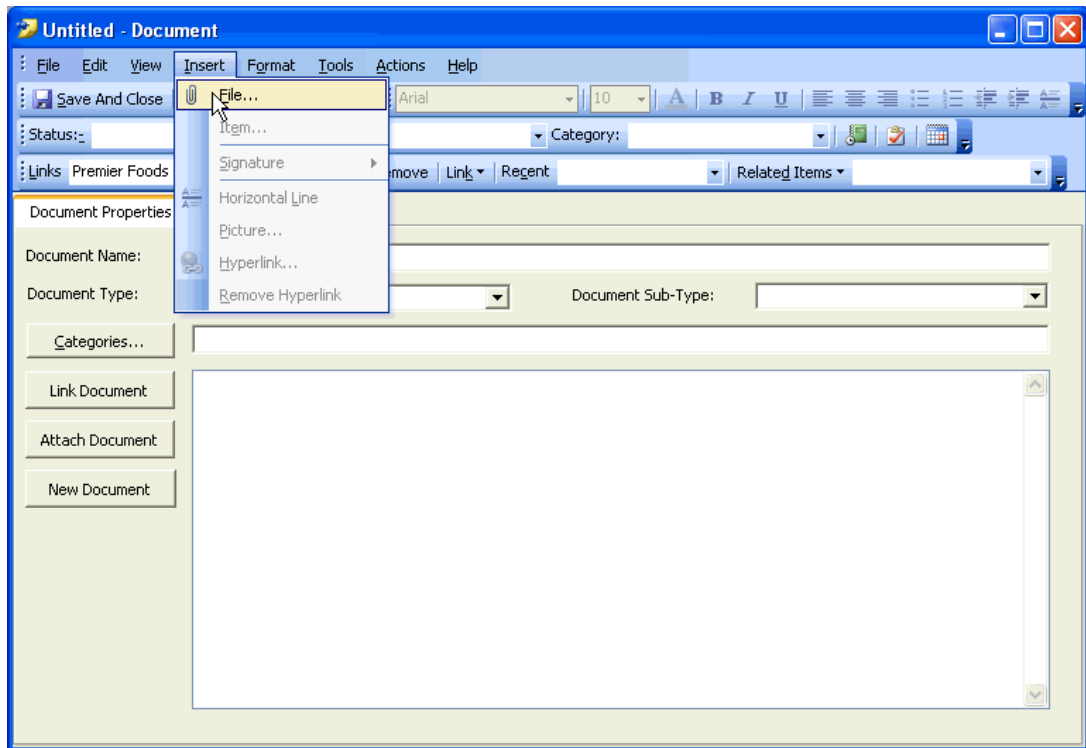
3. Open **Premier Foods**.
4. Click on the **Documents** Tab:



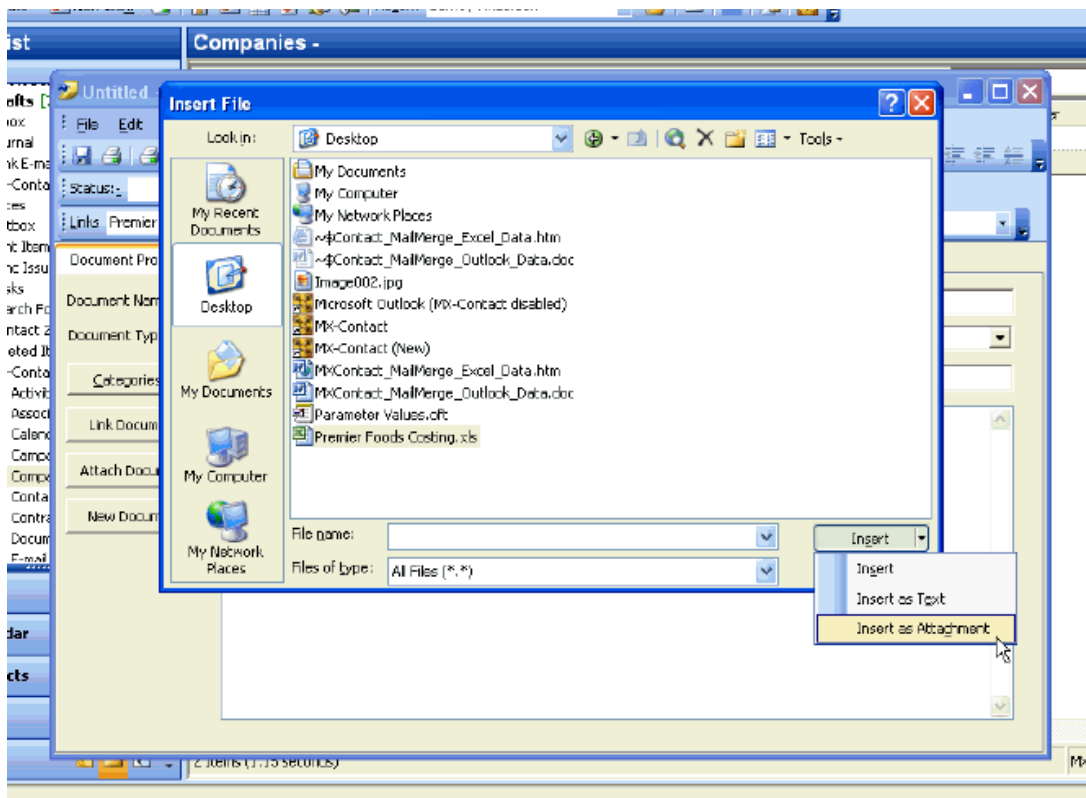
5. Click on **New Document**:



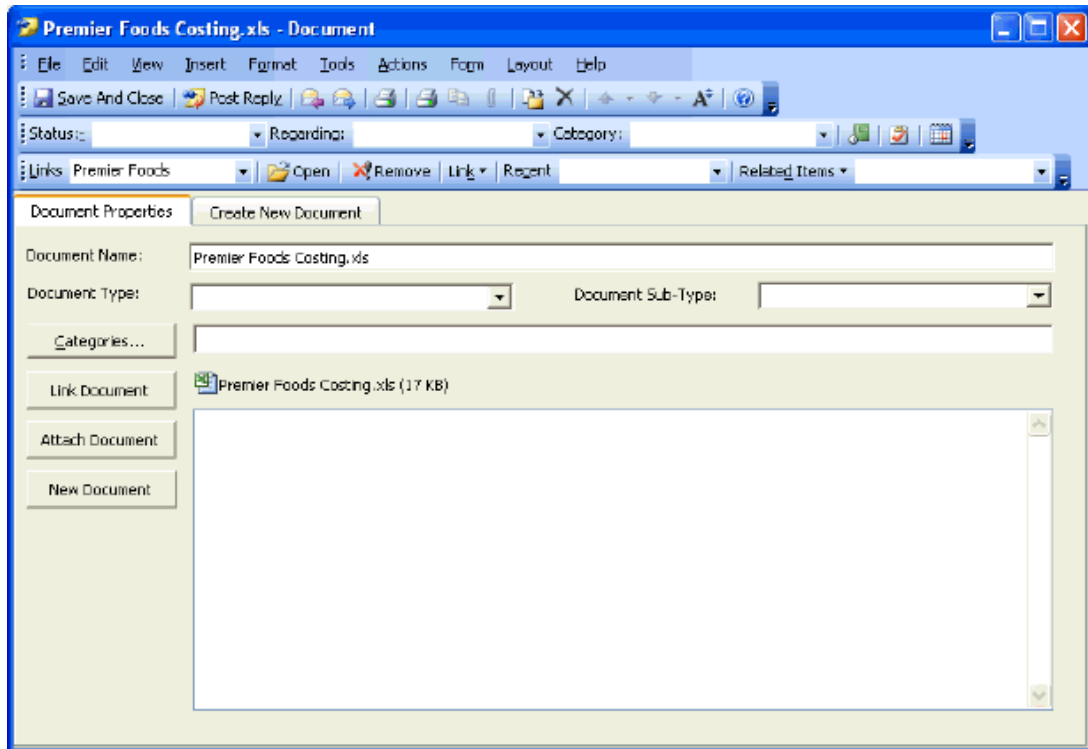
6. Click on **Insert File**:



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:

General Profile

Company: Premier Foods Business: +1 (206) 555-8411
Short/Other Name: Business Fax: +1 (206) 555-6687
Primary User:
Primary Group:

Address...: 305 14th Ave Suite B Seattle, WA 98128 United States of America
Business: E-mail:
Mailing Address: Web page address: <http://www.premierfoods.com.usa>
Mail Server:

Notes | Groups | Companies | Contacts | Users | Teams | Appointments | Tasks | Journals | **Documents** | E-Mail | Opportunities | Projects | Products | A |

Document Name	Document Type	Document Sub Type	Categories	From	Received
Barney Anderson Fax Cov...				Susan Jones	Wed 15/02/2006 10:...
Premier Foods Costing.xls				Susan Jones	Wed 15/02/2006 10:...

2 Items (0.54 seconds) MX-Grid Version: 7.1.2

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

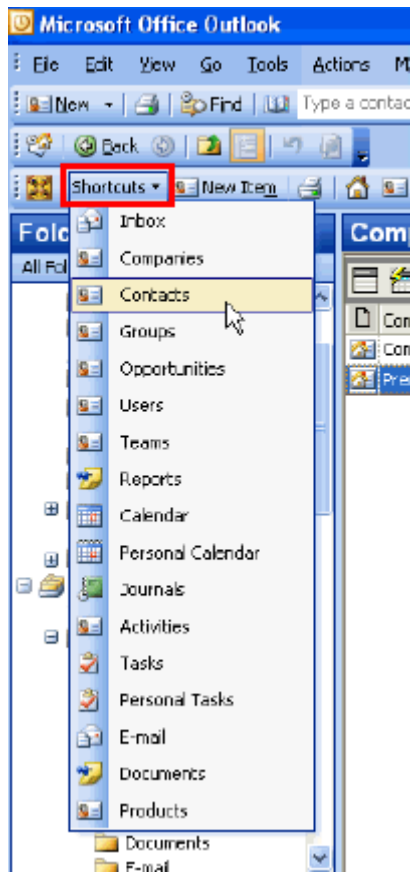
You have prepared a proposal for Barney and want to generate a Fax Cover Sheet for this proposal.

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

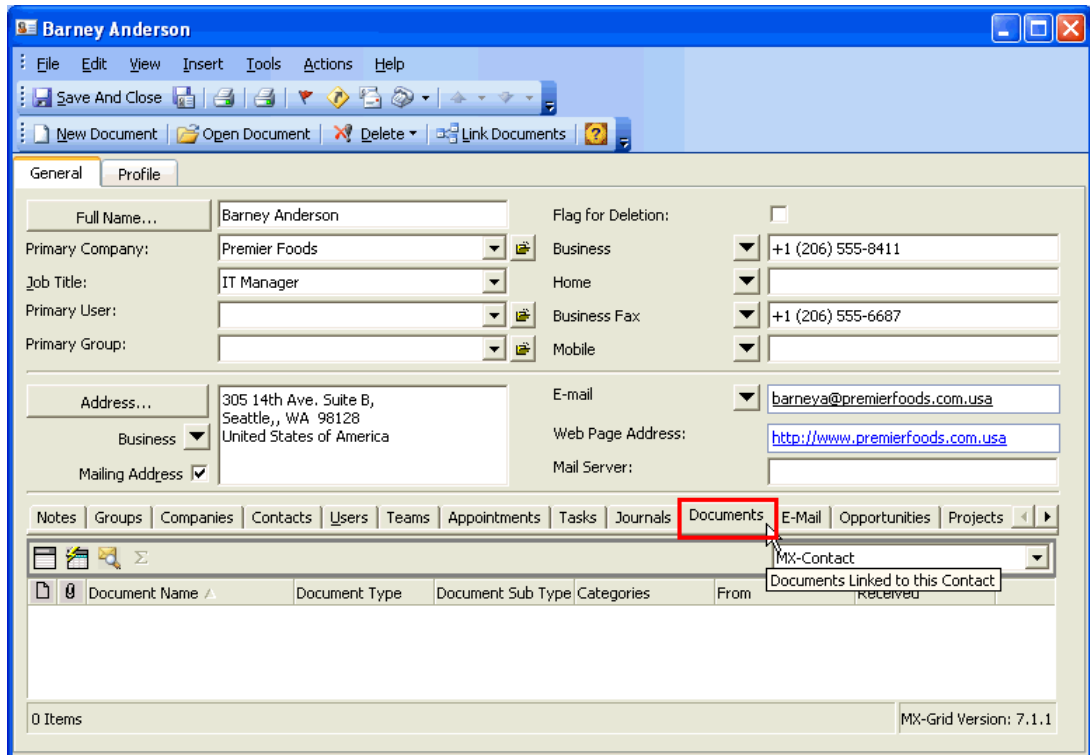
Templates Location:	Outlook/Exchange Folder
Templates Folder:	Templates
Template Name:	Contemporary Fax Contact
Document Name:	Barney Anderson Fax Cover.doc
Document Location:	Outlook/Exchange Folder
Document Folder:	Blank (disabled)
Insert as:	Attachment

Basic Steps:

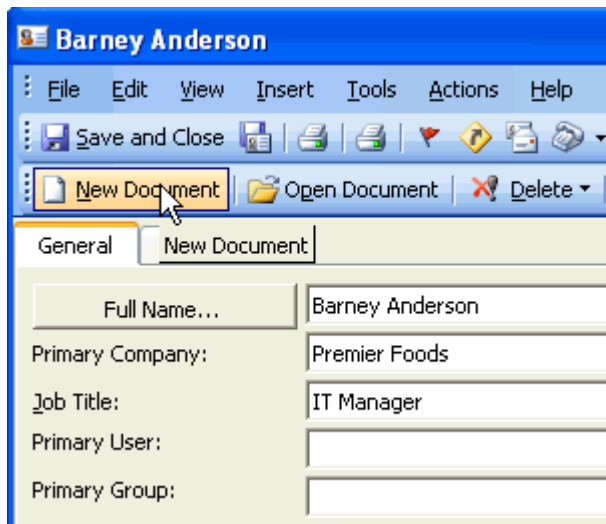
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



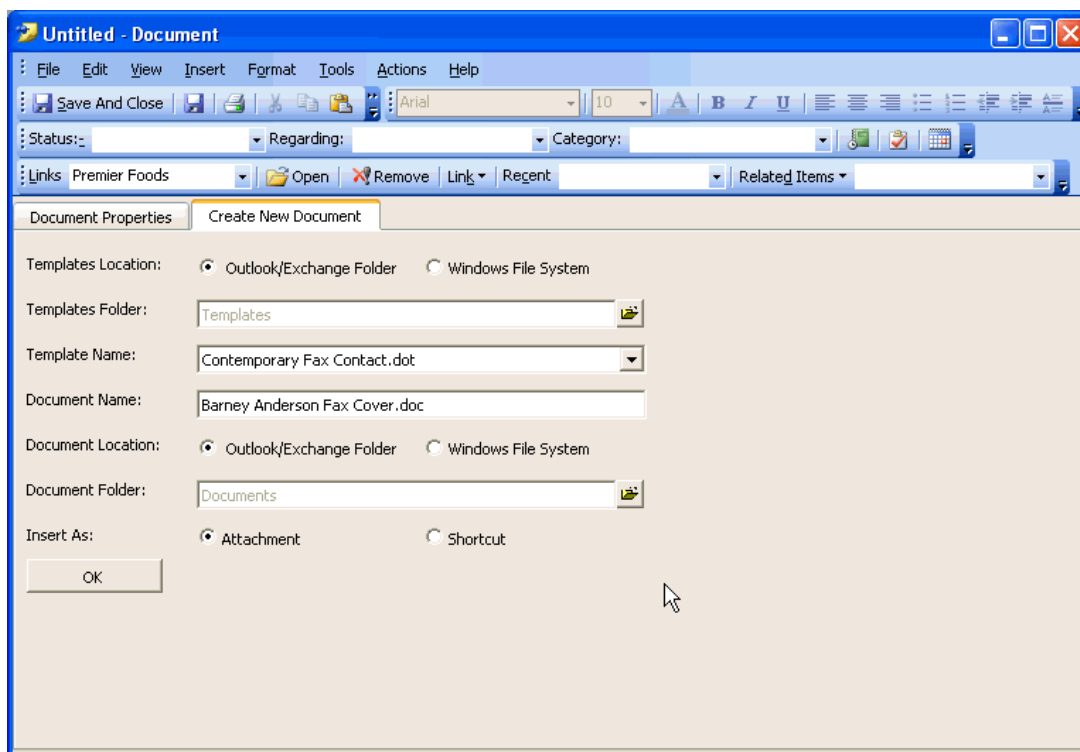
2. Open **Barney Anderson's** Contact Record.
3. Click on the **Documents** Tab.



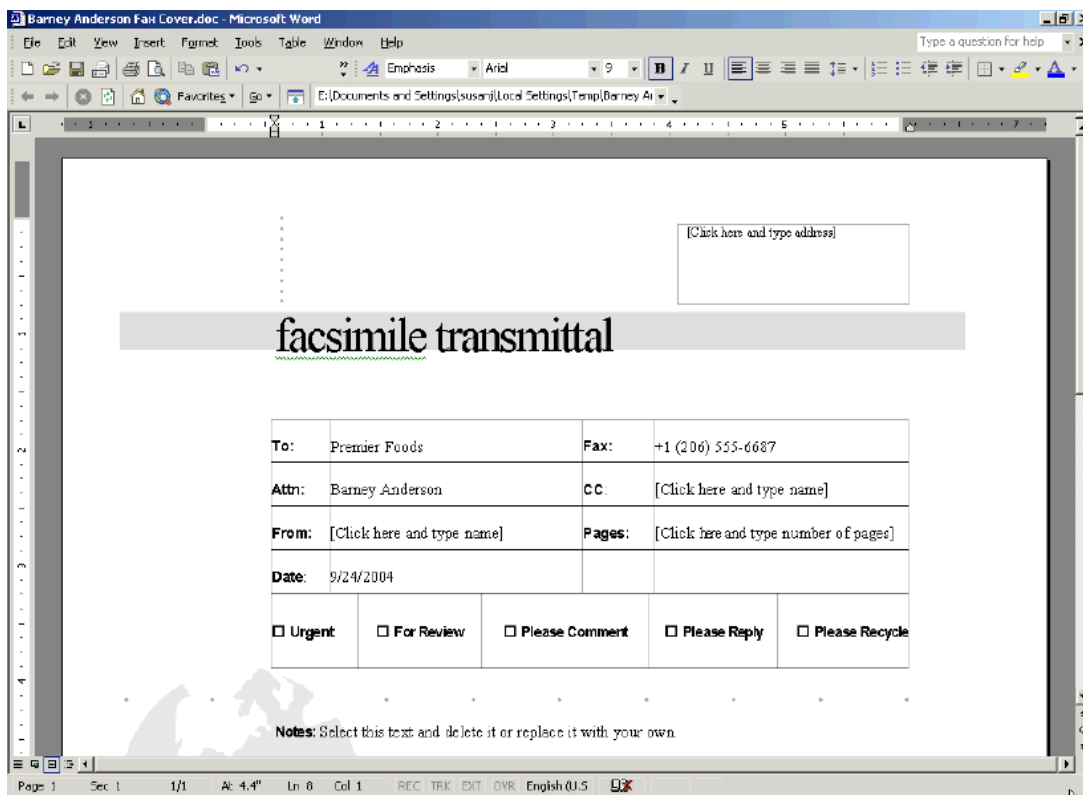
4. Click on **New Document**:



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**:

The screenshot shows the 'Premier Foods' contact form in the MX-Grid application. The 'Documents' tab is highlighted in red. The form contains the following information:

- Company:** Premier Foods
- Business:** +1 (206) 555-8411
- Business Fax:** +1 (206) 555-6687
- Address:** 305 14th Ave, Suite B, Seattle, WA 98128, United States of America
- Web page address:** <http://www.premierfoods.com.usa>

The 'Documents' table below the form is as follows:

Document Name	Document Type	Document Sub Type	Categories	From	Received
Barney Anderson Fax Cov...				Susan Jones	Wed 15/02/2006 10:...
Premier Foods Costing.xls				Susan Jones	Wed 15/02/2006 10:...

2 Items (0,54 seconds) MX-Grid Version: 7.1.2

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

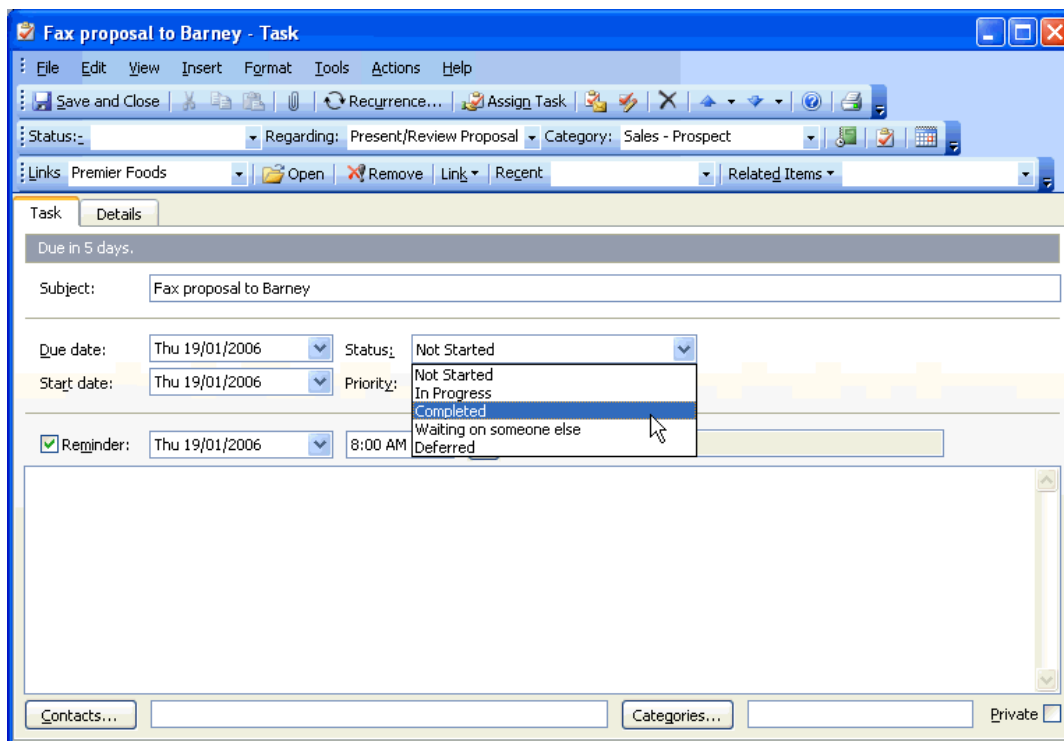
You have prepared the quotation for Barney Anderson and faxed it to him as promised. You therefore want to mark this Task as Complete and record the details in a Journal entry.

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

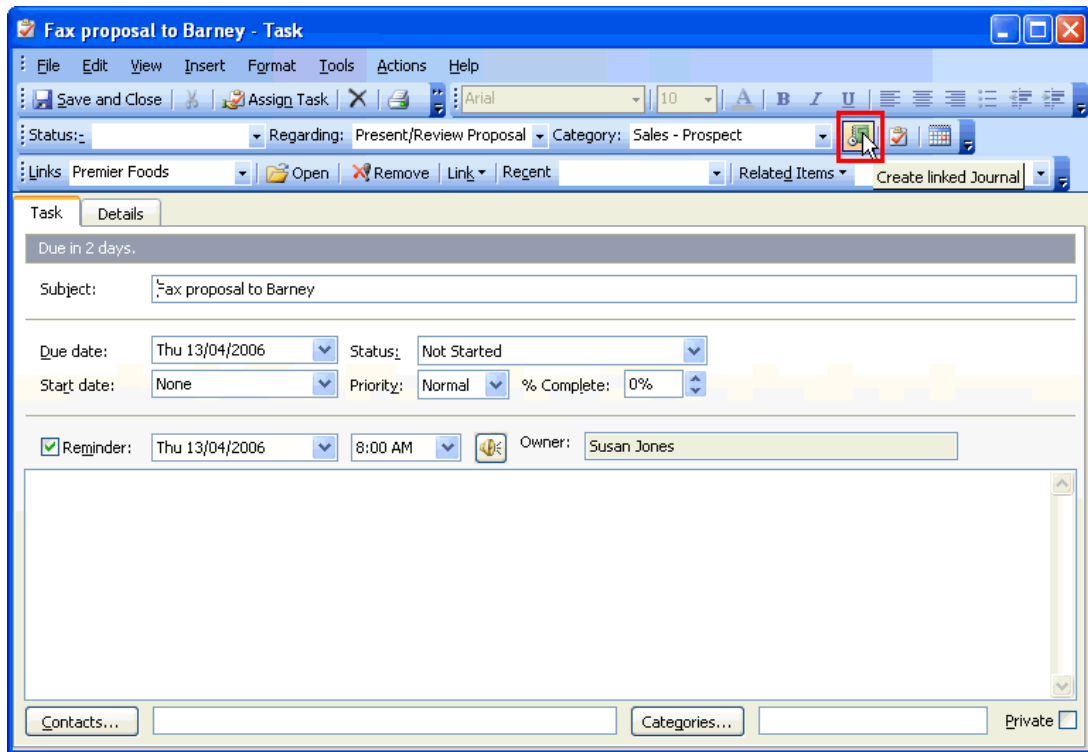
Subject:	Fax proposal to Barney
Entry Type:	Task
Memo:	Faxed the proposal. Offered him 15 % discount on the initial purchase.
Regarding:	Present/Review Proposal
Category:	Sales - Prospect

Basic Steps:

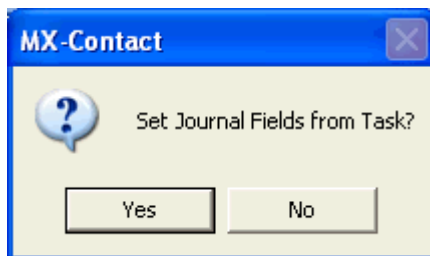
1. Click on your (Personal) **Tasks** Folder.
2. Open the **Task**:
3. Mark the **Task** as **Completed** (in the **Status** field):



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



- The following prompt will appear:



- 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.

Fax proposal to Barney

File Edit View Insert Format Tools Actions Help

Save and Close [Icons] Arial 12 [Icons] B I U [Icons]

Status: [Dropdown] Regarding: Present/Review Proposal Category: Sales - Prospect [Icons]

Links Premier Foods [Icons] Open Remove Link Recent Related Items [Dropdown]

Subject: Fax proposal to Barney

Entry type: Task Company: Premier Foods

Start time: Tue 11/04/2006 12:21 PM [Start Timer]

Duration: 0 minutes [Pause Timer]

Faxed the proposal. Offered him 15 % discount on the initial purchase.

Contacts... Categories... Private

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

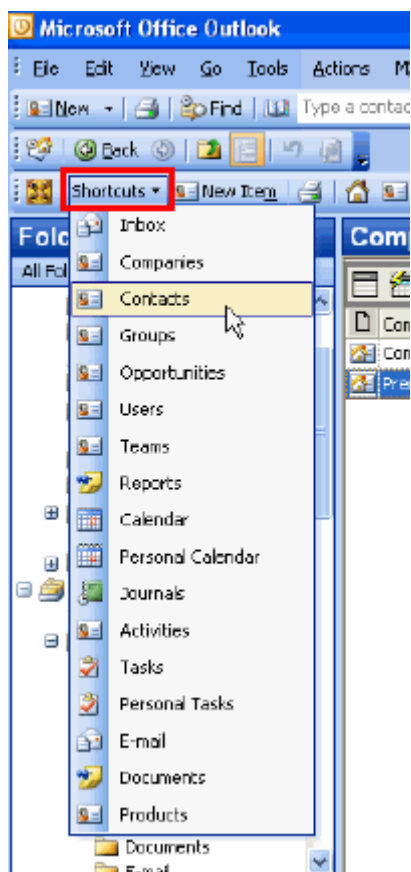
You want to send Barney Anderson a follow up e-mail regarding the proposal that you sent a few days ago.

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.

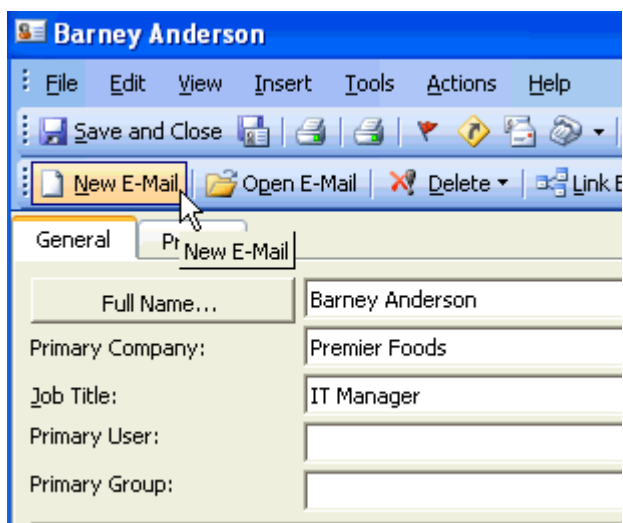
To:	barneya@premierfoods.com.usa (appears automatically)
Cc:	gillianm@premierfoods.com.usa (select from Recipients drop down list)
Subject:	Follow up on Proposal
Memo:	<p>Hi Barney</p> <p>Just a quick note to check that you received the proposal sent a few days ago. Please feel free to contact me if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

Basic Steps:

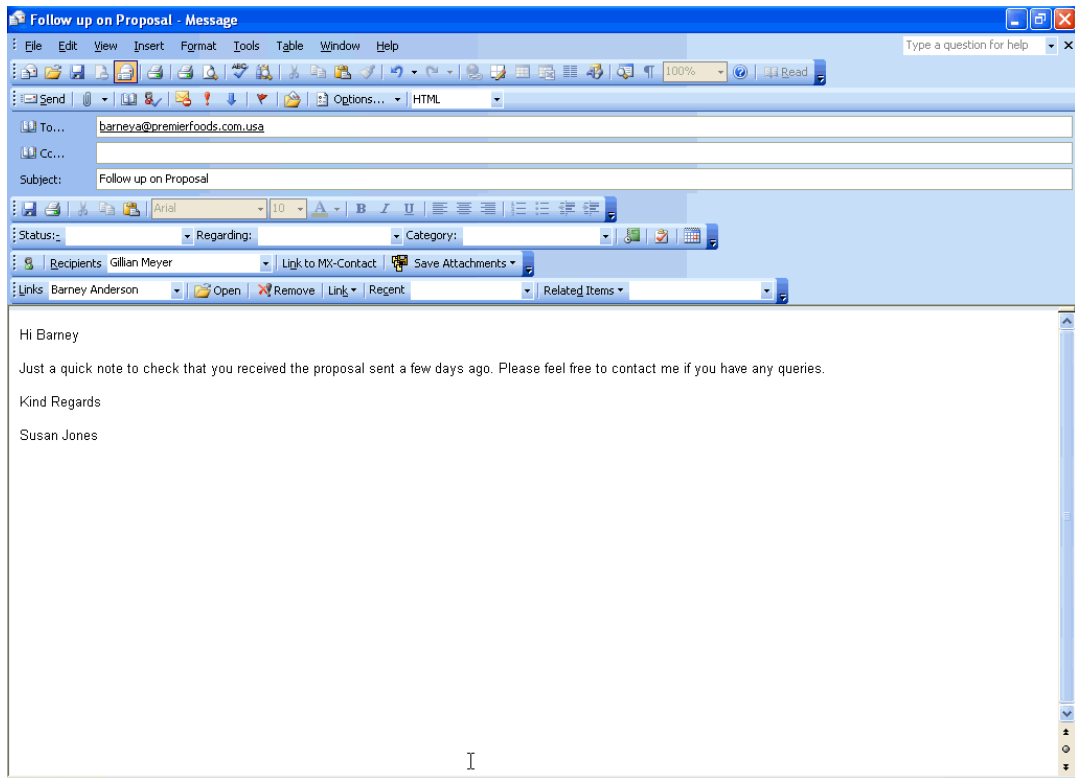
1. Select the **Contacts** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



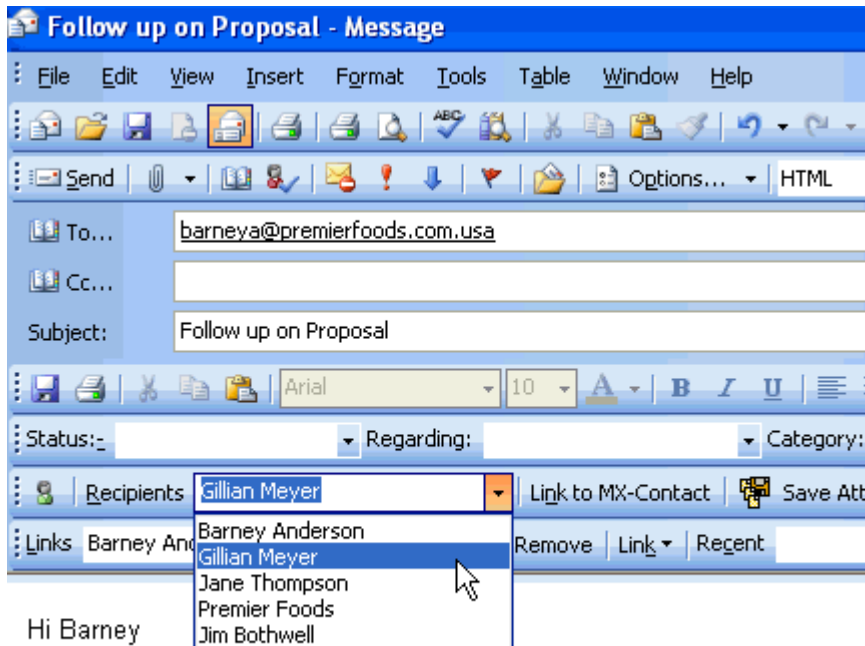
2. Open **Barney Anderson's** Contact Record.
3. Click on the **E-mail** Tab.
4. Click on **New E-Mail**:



5. Enter the details shown above:

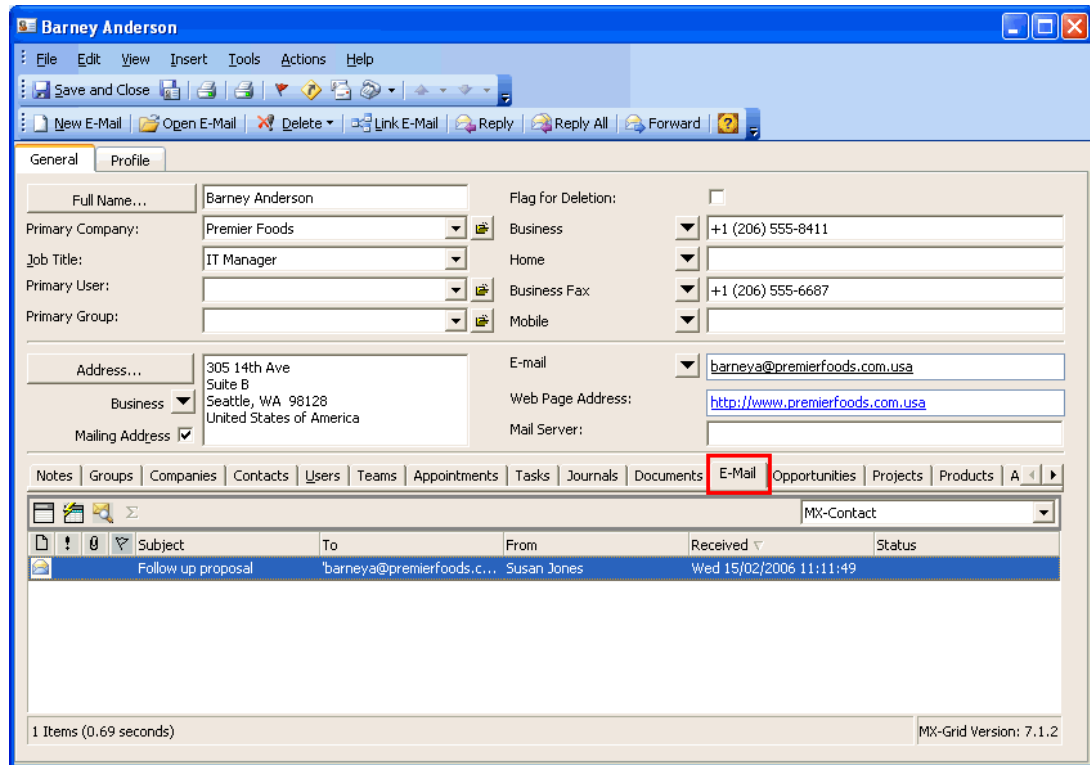


6. To copy the mail to **Gillian Meyer**, position the cursor in the **CC...** field
7. Click on the Recipients button in order to fill the Recipients Combo if necessary and then select **Gillian Meyer** from the **Recipients** dropdown.



Just a quick note to check that you received the proposal sent a few days

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

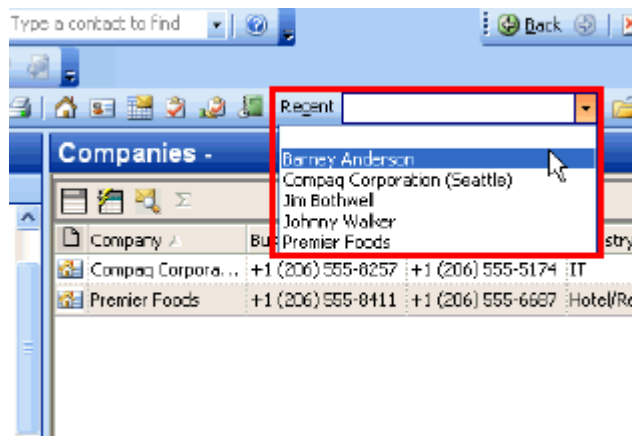
You receive a telephone call from Barney Anderson who has received your proposal and your follow up e-mail. He had some additional questions about commercial terms and conditions. Add a journal to record the details of this call. This will ensure that other users who need to know about this phone call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

Complete the following information on the Journal:

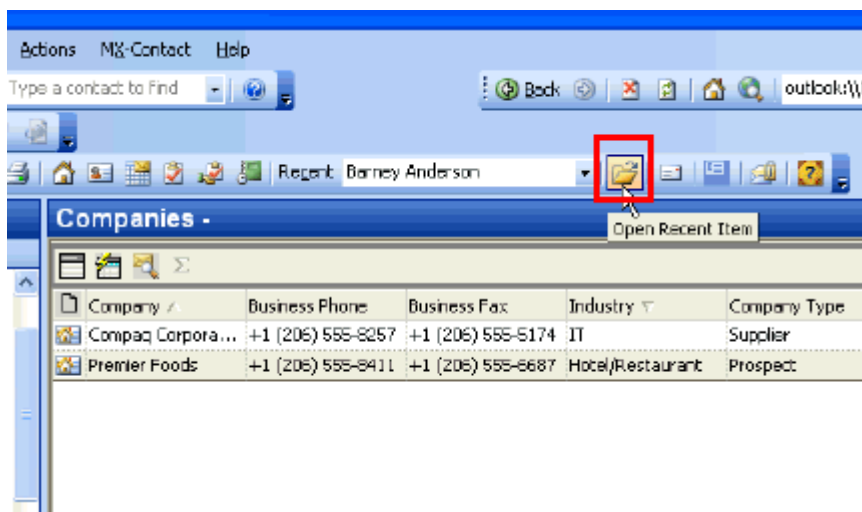
Subject:	Call about terms and conditions
Entry Type:	Phone Call
Date:	The day after the follow up e-mail
Duration:	15 mins
Memo:	Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier would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

Basic Steps:

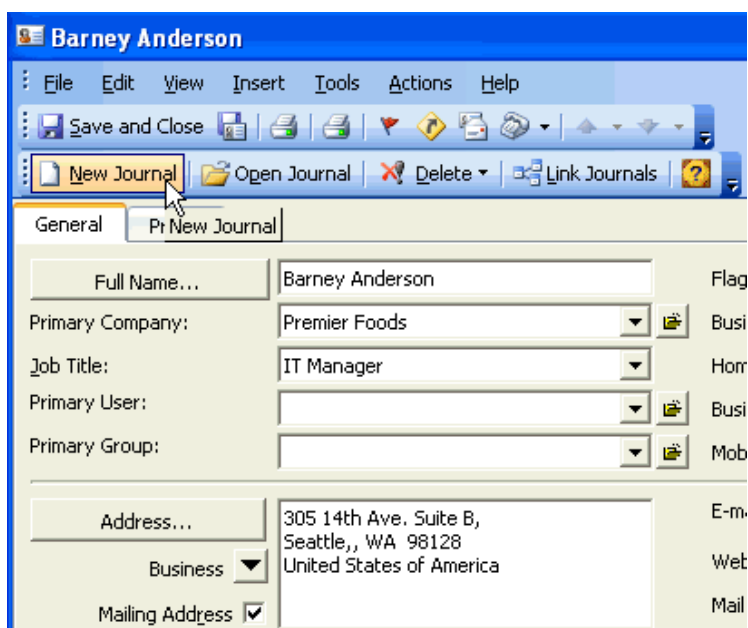
1. Open the contact **Barney Anderson** (try this from Recent Items). Click on the Recent Items drop down list and select **Barney Anderson**.



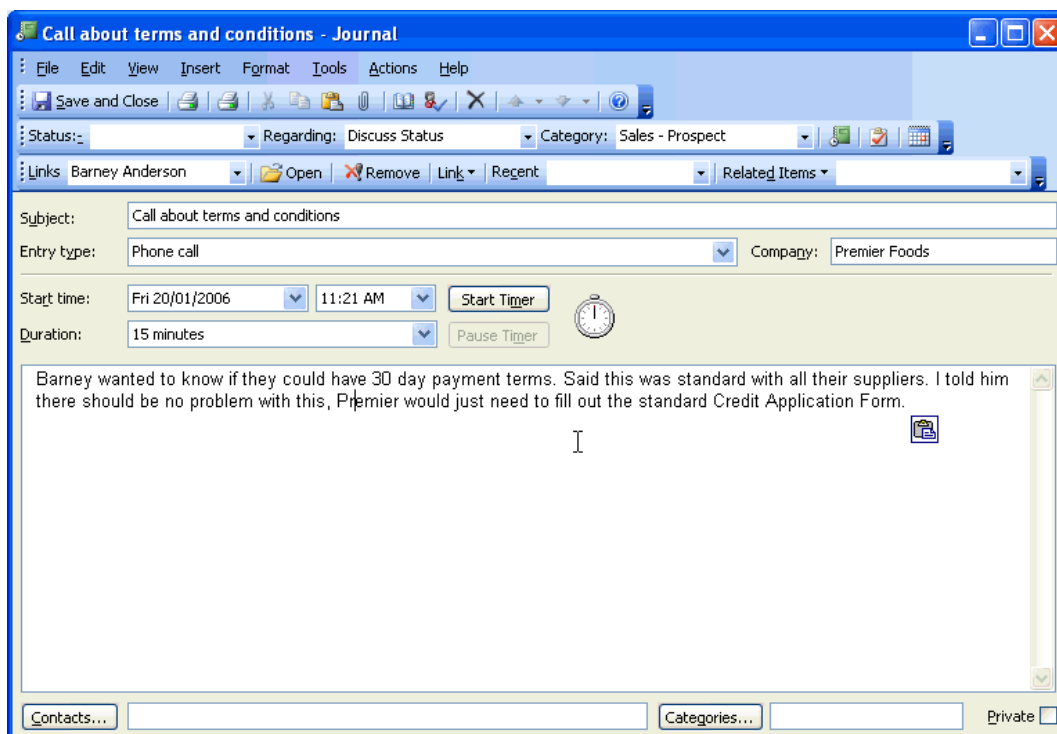
2. Click on the **Open Recent Item** button.



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](#))

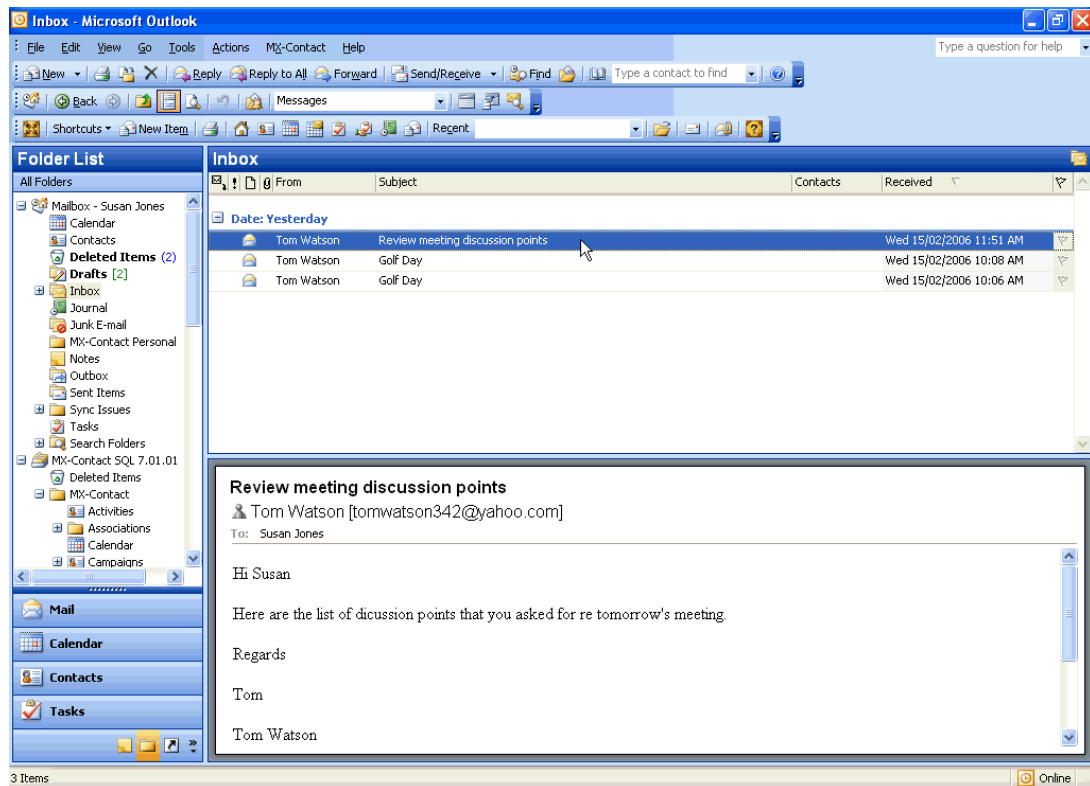
3.18 Creating a Contact from an Incoming E-Mail : Solution

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.

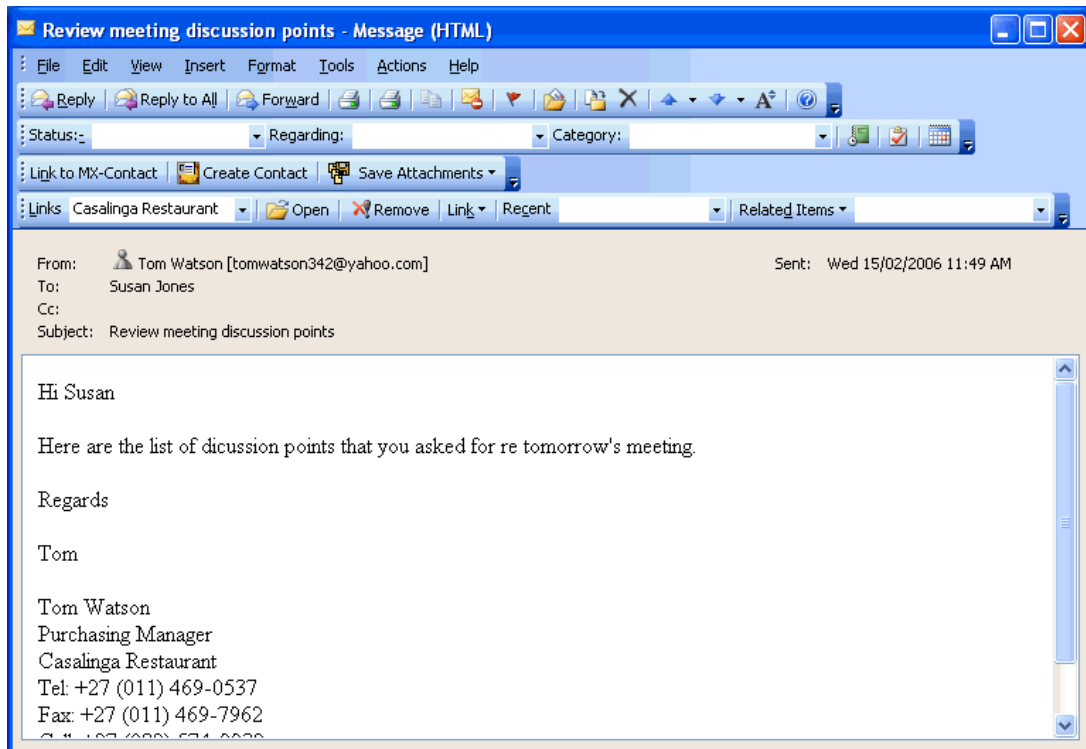
Use any e-mail in your Inbox sent from someone outside your company for this purpose. Use a contact for whom you have more than one e-mail in your Inbox as a second e-mail will be needed for the following exercise **Link an incoming E-Mail** ([Linking an Incoming E-Mail : Exercise](#)).

Solution:

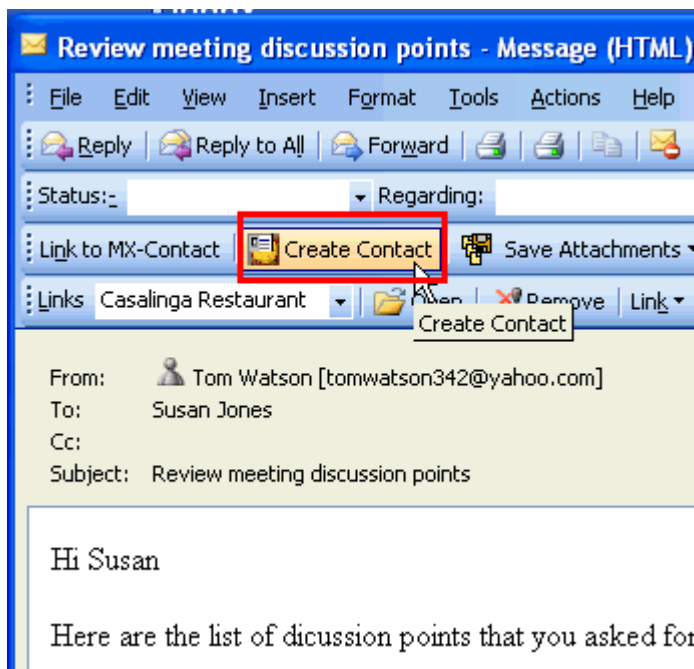
1. Select the e-mail in your Inbox:



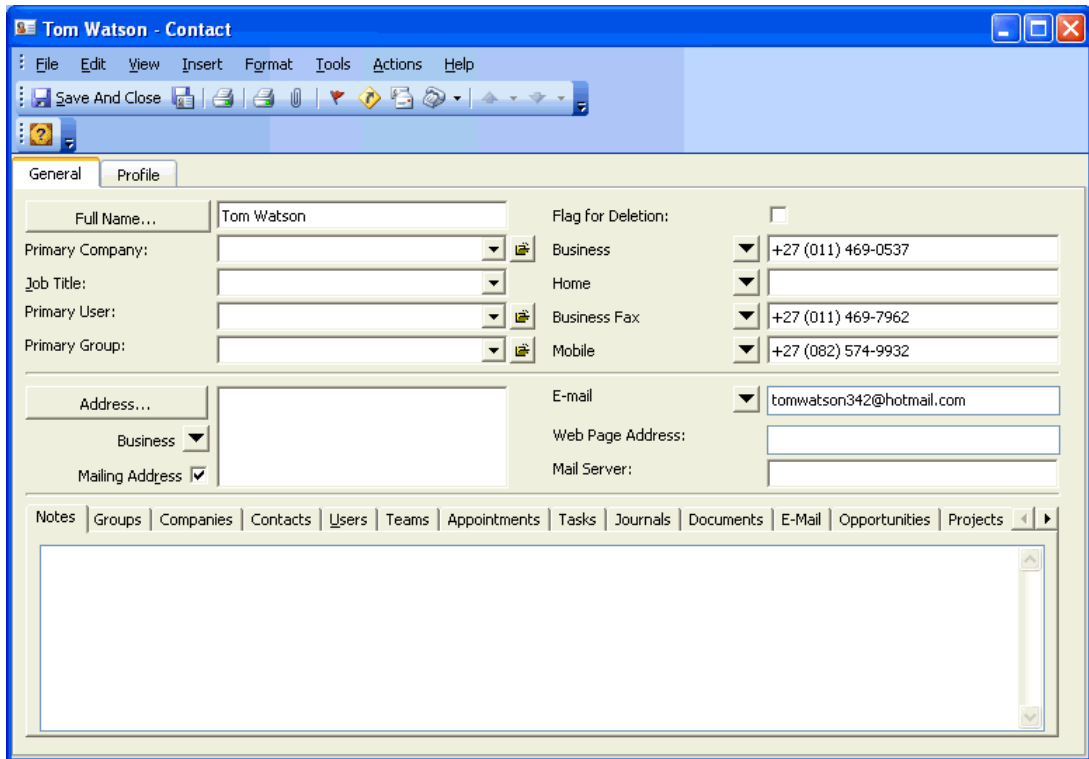
2. Open the e-mail:



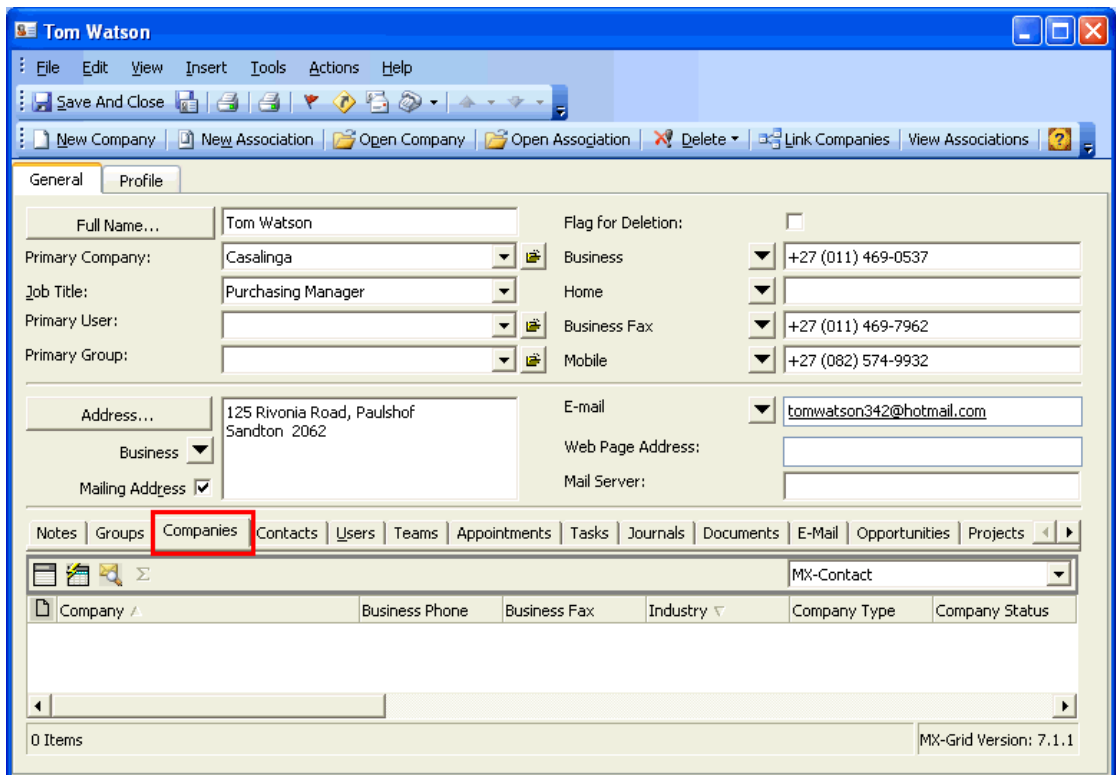
3. Click on **Create Contact**:



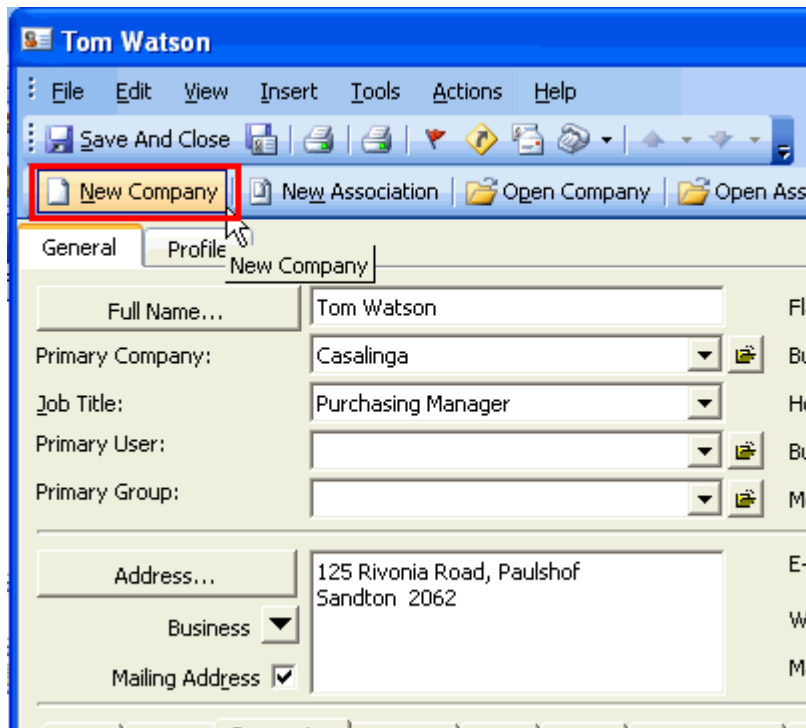
4. A **Contact** Form will open containing personal details of the person that the e-mail was from. These details are retrieved from the person's signature in the e-mail.



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.

The screenshot shows a software window titled "Casalinga - Company". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into two tabs: "General" and "Profile". The "General" tab is active. The form contains several input fields and dropdown menus. The "Company" field is filled with "Casalinga". The "Business" field is filled with "+27 (011) 469-0537". The "Business Fax" field is filled with "+27 (011) 469-7962". The "Address..." field is filled with "125 Rivonia Road, Paulshof Sandton 2062". The "Mailing Address" checkbox is checked. The "E-mail" field is empty. The "Web page address" field is empty. The "Mail Server" field is empty. At the bottom of the form, there is a navigation bar with tabs for "Notes", "Groups", "Companies", "Contacts", "Users", "Teams", "Appointments", "Tasks", "Journals", "Documents", "E-Mail", "Opportunities", and "Projects". The "Companies" tab is selected.

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

Tom Watson

File Edit View Insert Tools Actions Help

Save And Close

New Company New Association Open Company Open Association Delete Link Companies View Associations

General Profile

Full Name... Tom Watson Flag for Deletion:

Primary Company: Casalinga Business +27 (011) 469-0537

Job Title: Purchasing Manager Home

Primary User: Business Fax +27 (011) 469-7962

Primary Group: Mobile +27 (082) 574-9932

Address... 125 Rivonia Road, Paulshof Sandton 2062 E-mail tomwatson342@hotmail.com

Business Web Page Address:

Mailing Address Mail Server:

Notes Groups **Companies** Contacts Users Teams Appointments Tasks Journals Documents E-Mail Opportunities Projects

MX-Contact

Company	Business Phone	Business Fax	Industry	Company Type	Company Status
Casalinga	+27 (011) 469-0...	+27 (011) 469-7...			

1 Items MX-Grid Version: 7.1.1

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.

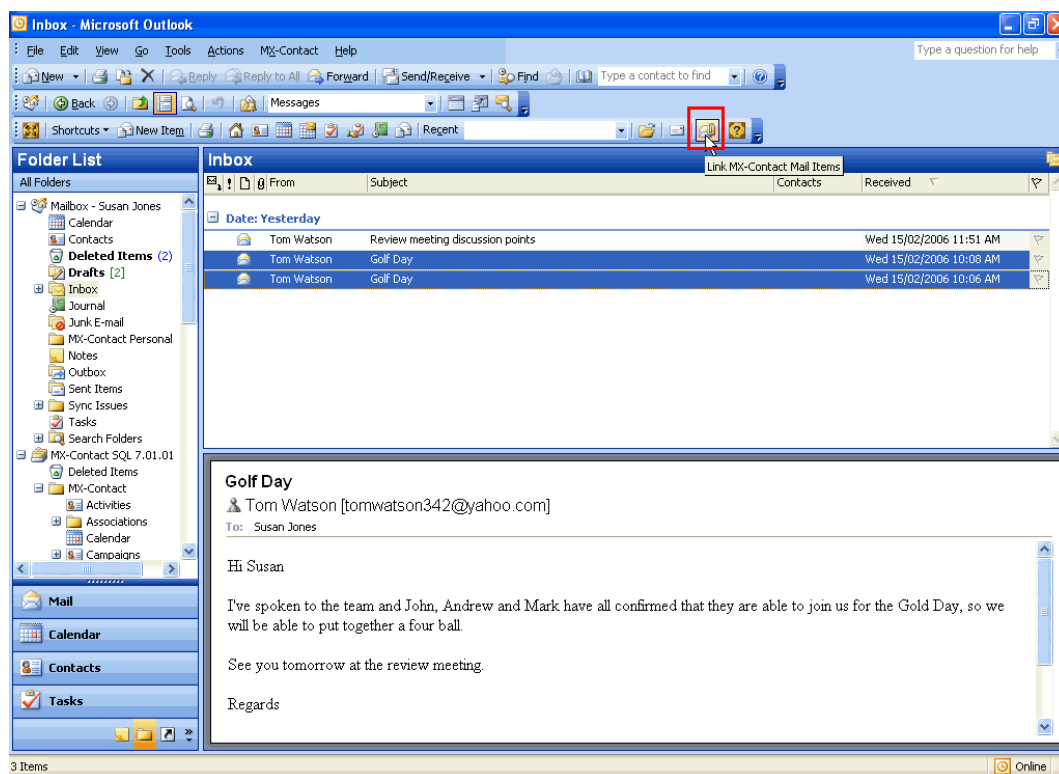
Show me the **Solution** ([Linking an Incoming E-Mail : Solution](#))

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**.

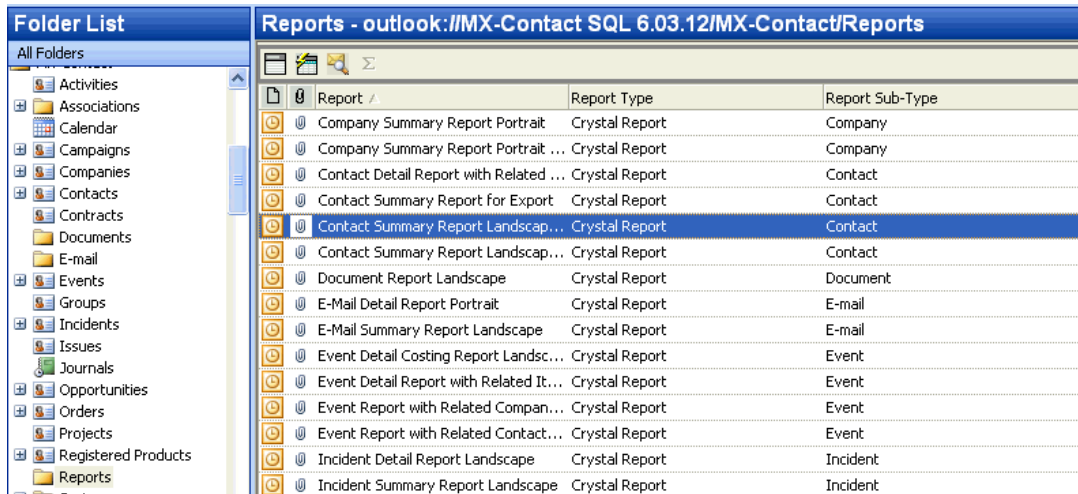
Show me the **Solution** ([Contact Summary Report : Solution](#))

4.2 Contact Summary Report : Solution

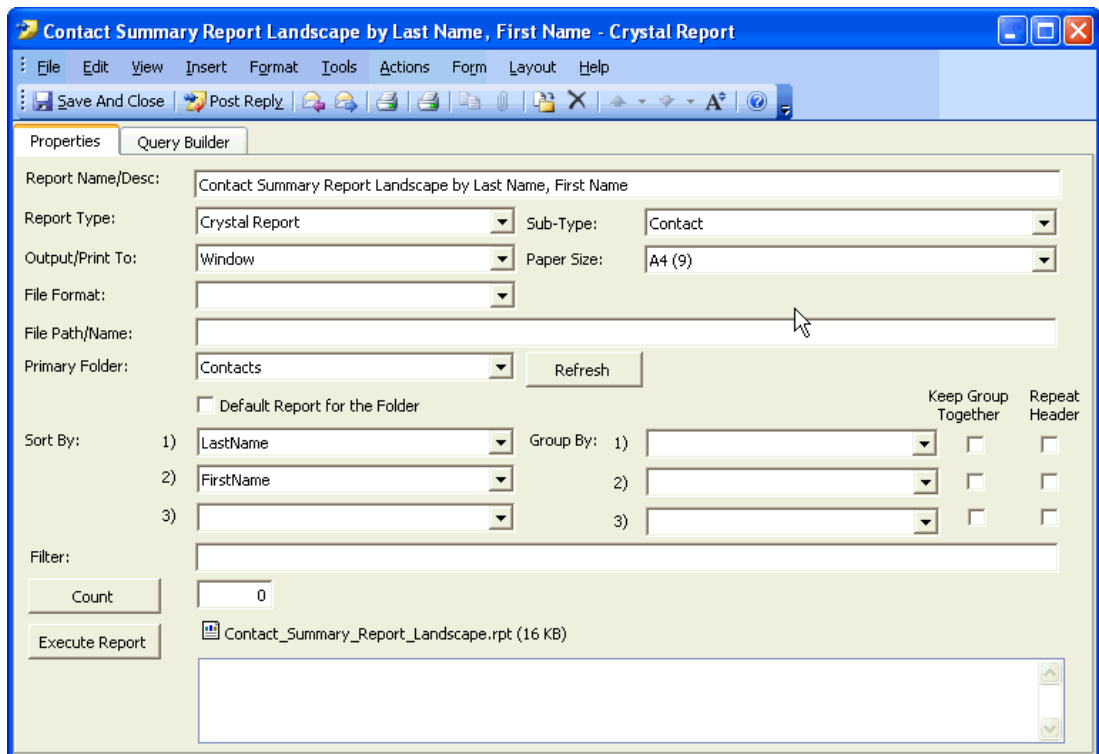
Run the **Contact Summary Report Landscape by Last Name, First Name**.

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:

MX-Contact Crystal Reporting

File 16, 2008 10:16

1 of 1

powered by crystal

Page: 1 of 1

Sorted By: Last Name, first Name

Last Name	First Name	Job Title	Company Name	Business Phone	Business Fax	Mobile No.	Email
Anderson	Barney	IT Manager	Premier Foods	+1 (206) 555-8411	+1 (206) 555-6687		barneya@premierfoods.com.au
Solwell	Jim	Consultant	Premier Foods	+1 (780) 382-0808			jsolwell@holisti.com.au.a
Meyer	Gillian	VP Information Systems	Premier Foods	+1 (206) 555-8411	+1 (206) 555-6687		gilliam@premierfoods.com.au
Walker	Johnny	Account Manager	Compass Corporation (Seattle)			+1 (780) 382-0808	johnnywalker@compass.com.au
Walton	Tom	Purchasing Manager	Caralunga Restaurant	+27 (0)11 469-0637	+27 (0)11 469-7962	+27 (082) 57 49632	tomwalton342@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**.

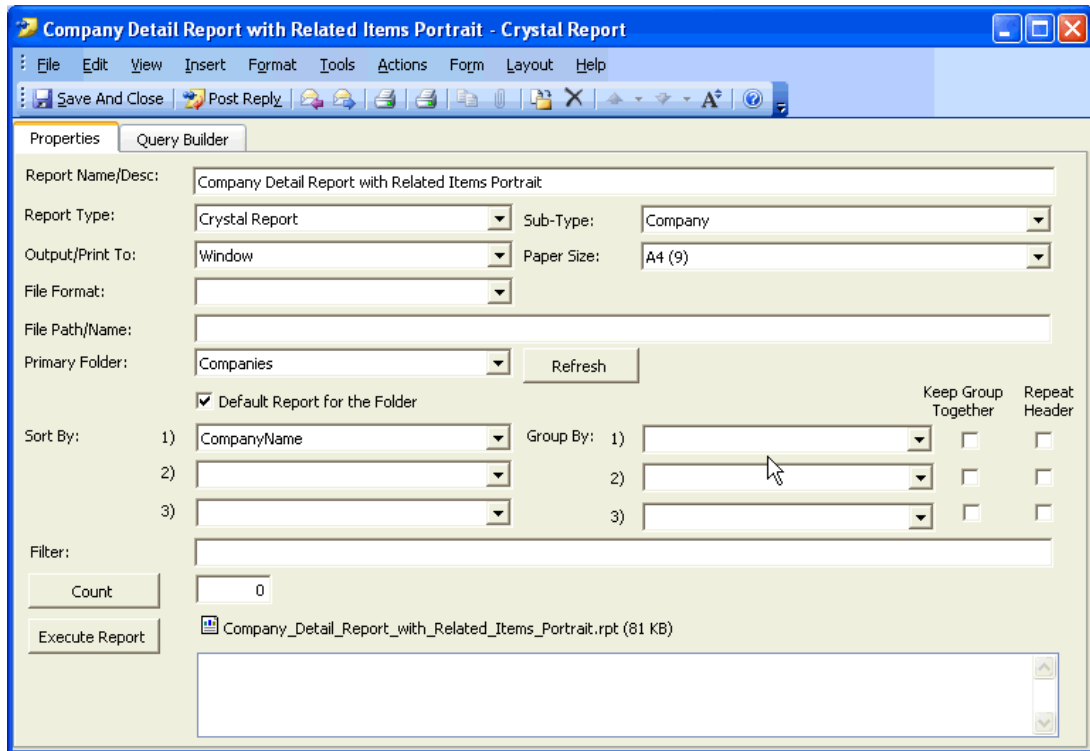
Basic Steps:

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

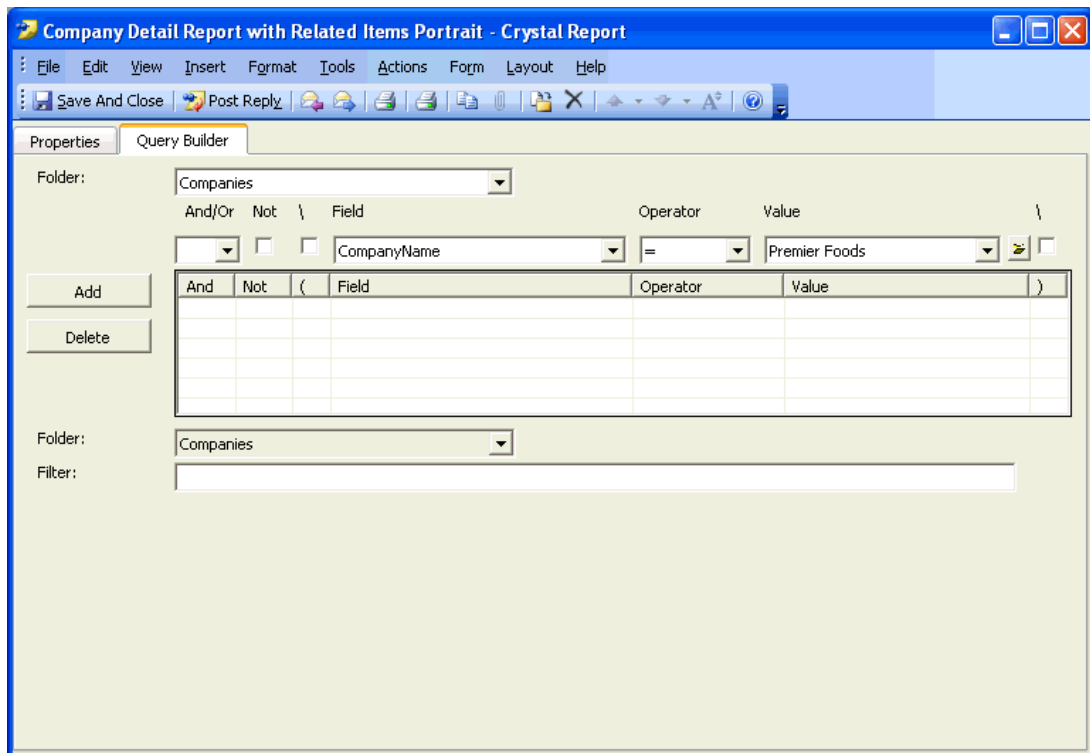
The screenshot shows the software interface with two main panes. The left pane, titled 'Folder List', shows a tree view of folders including Activities, Associations, Calendar, Campaigns, Companies, Contacts, Contracts, Documents, E-mail, Events, Groups, Incidents, Journals, Opportunities, Orders, Projects, Registered Products, and Reports. The right pane, titled 'Reports - outlook://MX-Contact SQL 6.03.12/MX-Contact/Reports', displays a table of reports.

Report	Report Type	Report Sub-Type
Company Detail Last Contact Repo...	Crystal Report	Company
Company Detail Report Landscape	Crystal Report	Company
Company Detail Report with Relate...	Crystal Report	Company
Company Detail Report with Related Items Portrait	Crystal Report	Company
Company Report with Contacts for ...	Crystal Report	Company
Company Report with Contacts for ...	Crystal Report	Company
Company Sales Plan Report (LAMP)	Crystal Report	Company
Company Summary Last Contact R...	Crystal Report	Company
Company Summary Report Landscape	Crystal Report	Company
Company Summary Report Landsca...	Crystal Report	Company
Company Summary Report Landsca...	Crystal Report	Company
Company Summary Report Landsca...	Crystal Report	Company
Company Summary Report Portrait	Crystal Report	Company
Company Summary Report Portrait ...	Crystal Report	Company
Contact Detail Report with Related ...	Crystal Report	Contact

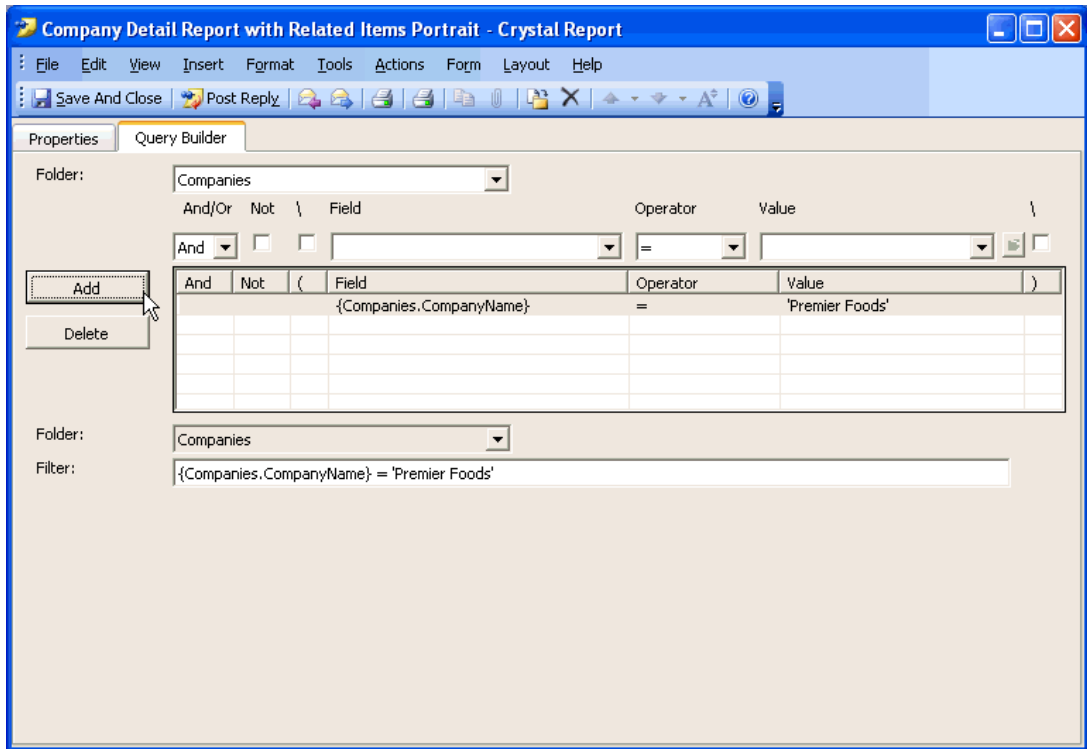
3. Open the **Company Detail Report with Related Items Portrait**:



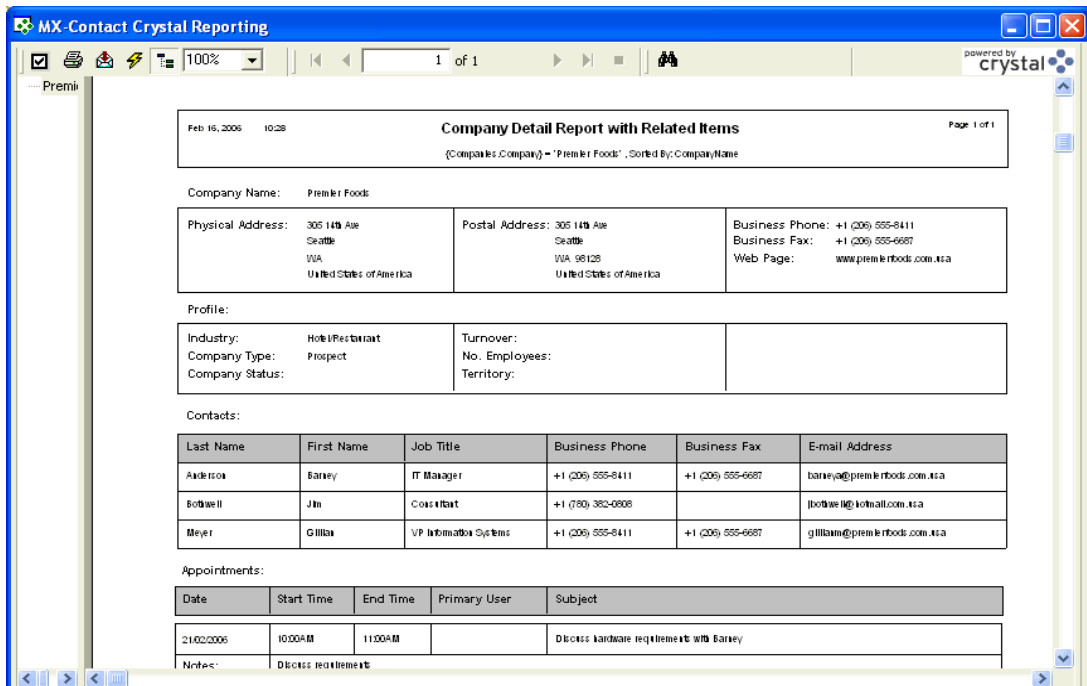
4. Click on the **QueryBuilder** Tab. Enter the condition "CompanyName = Premier Foods":



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



- 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

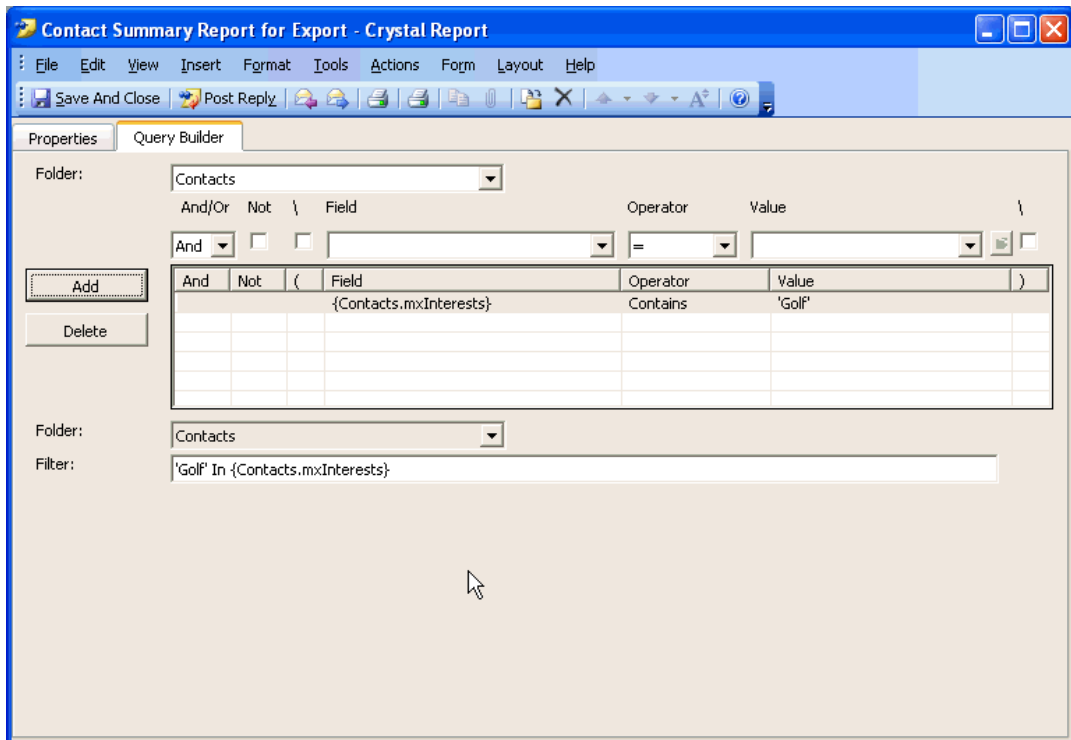
Send a personalised letter to all the golfers on your database inviting them to a Golf Day.

Basic Steps:

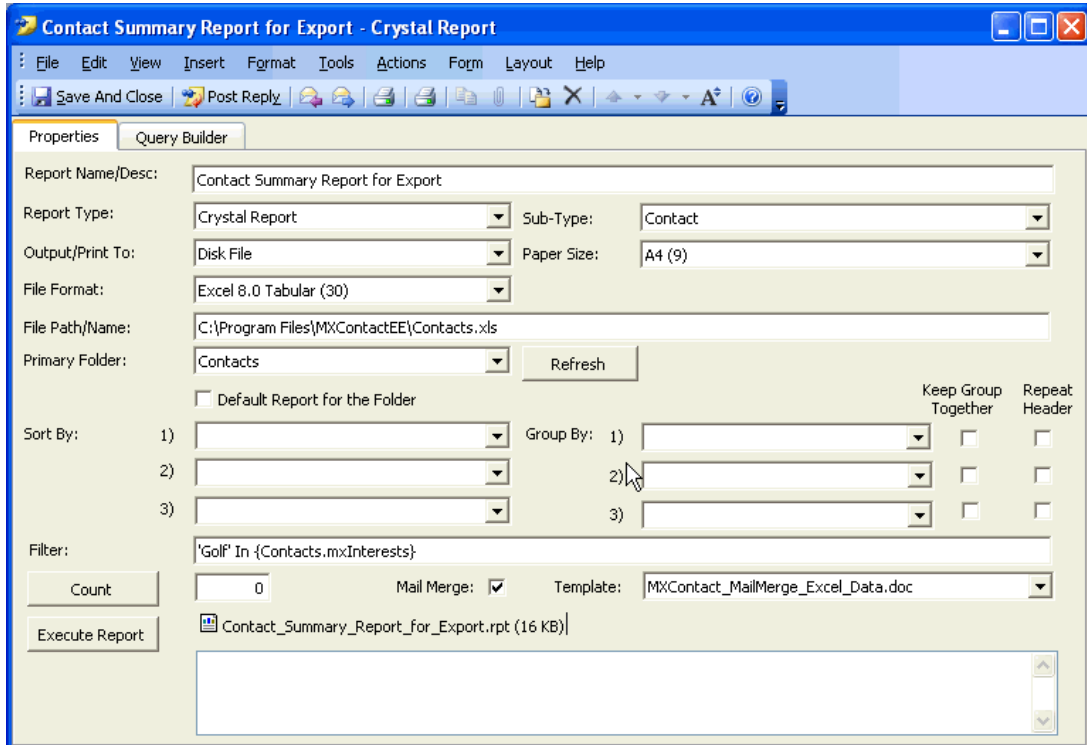
1. Click on the **Reports** Folder. Open the report entitled **Contact Summary Report for Export**. The following screen will appear:

The screenshot shows the 'Contact Summary Report for Export - Crystal Report' dialog box. The 'Query Builder' tab is selected. The 'Report Name/Desc' field contains 'Contact Summary Report for Export'. The 'Report Type' is set to 'Crystal Report' and the 'Sub-Type' is 'Contact'. The 'Output/Print To' is 'Disk File' and the 'Paper Size' is 'A4 (9)'. The 'File Format' is 'Excel 8.0 Tabular (30)'. The 'File Path/Name' is 'C:\Program Files\MXContactEE\Contacts.xls'. The 'Primary Folder' is 'Contacts'. There are 'Sort By' and 'Group By' sections, each with three rows of dropdown menus. A 'Filter' section is empty. The 'Count' is '0'. The 'Mail Merge' checkbox is unchecked. The 'Template' is 'Contact_Summary_Report_for_Export.rpt (16 KB)'. There is an 'Execute Report' button.

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.

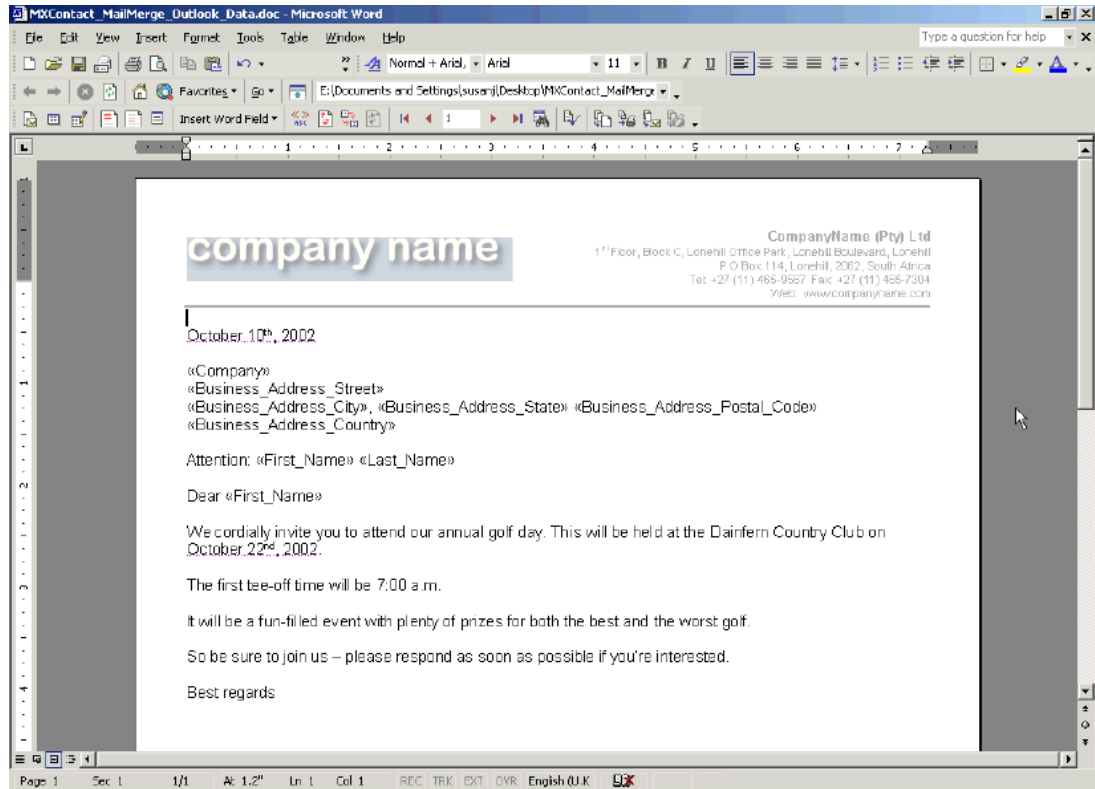


3. Click back onto the **Properties** Tab. Check the Mail Merge checkbox and select the file MXContact_MailMerge_Excel_Data.doc from the Template drop down list.

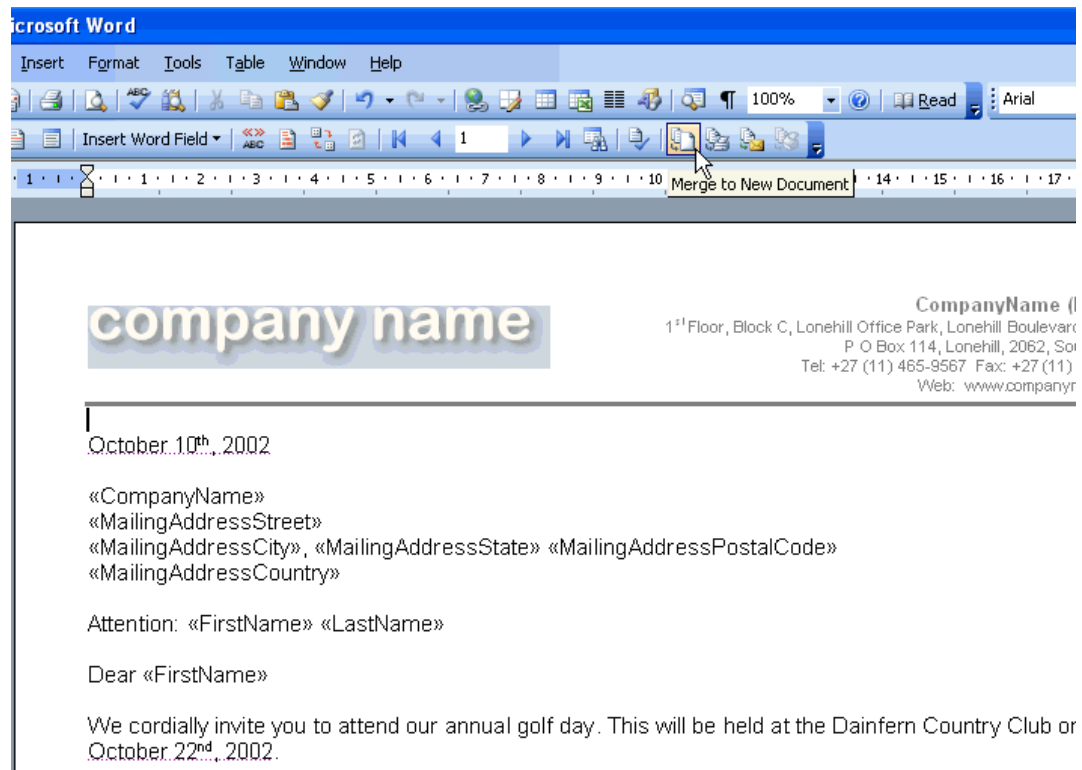


4. Make sure the **Output/Print To** field to is set to **Disk File**.

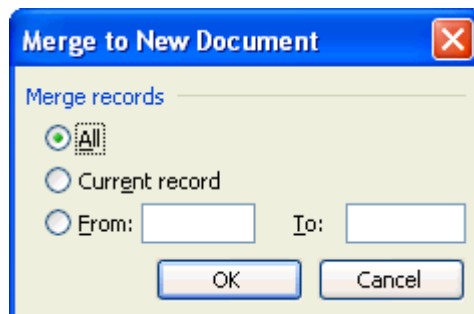
5. Make sure that **File Format** is set to **Excel 8.0 (XLS)** for the format.
6. Click **Execute Report**.
7. This will create the file needed by Microsoft Word or your Mass E-Mail program. This file contains the most commonly used Company Name and Address fields along with the Contact Address, Job 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
1st Floor, Block C, Lonehill Office Park, Lonehill Boulevard, Lr
P O Box 114, Lonehill, 2062, South.
Tel: +27 (11) 465-9567 Fax: +27 (11) 465
Web: www.companynam

October 10th, 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 22nd, 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 golfer.

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.

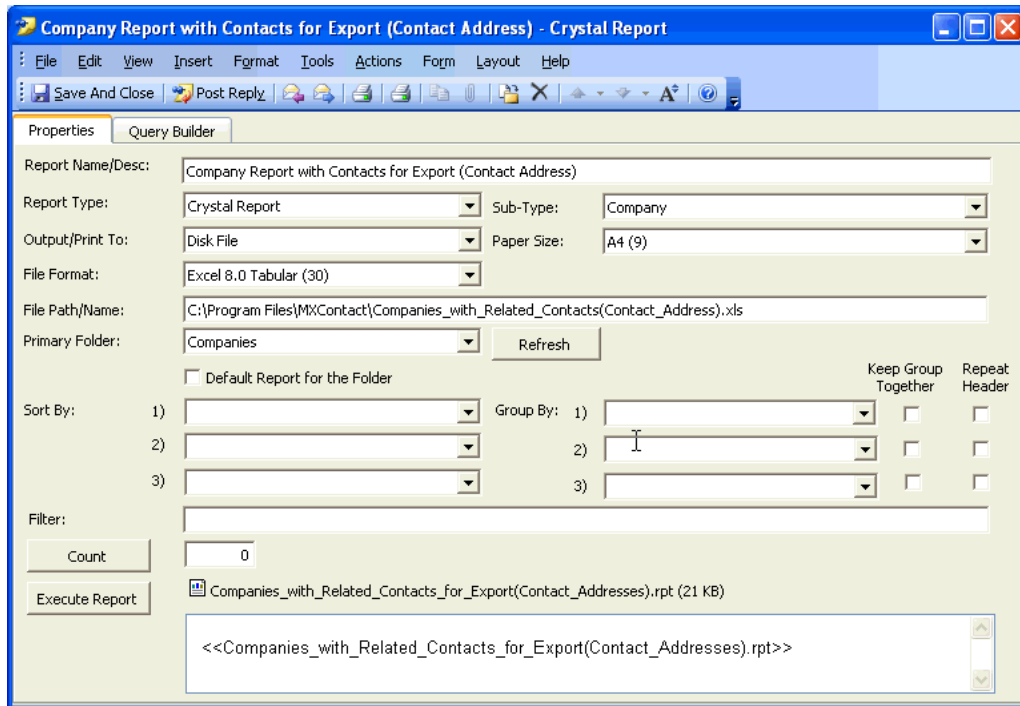
Show me the **Solution** ([Personalised E-Mail : Solution](#))

5.4 Personalised E-Mail : Solution

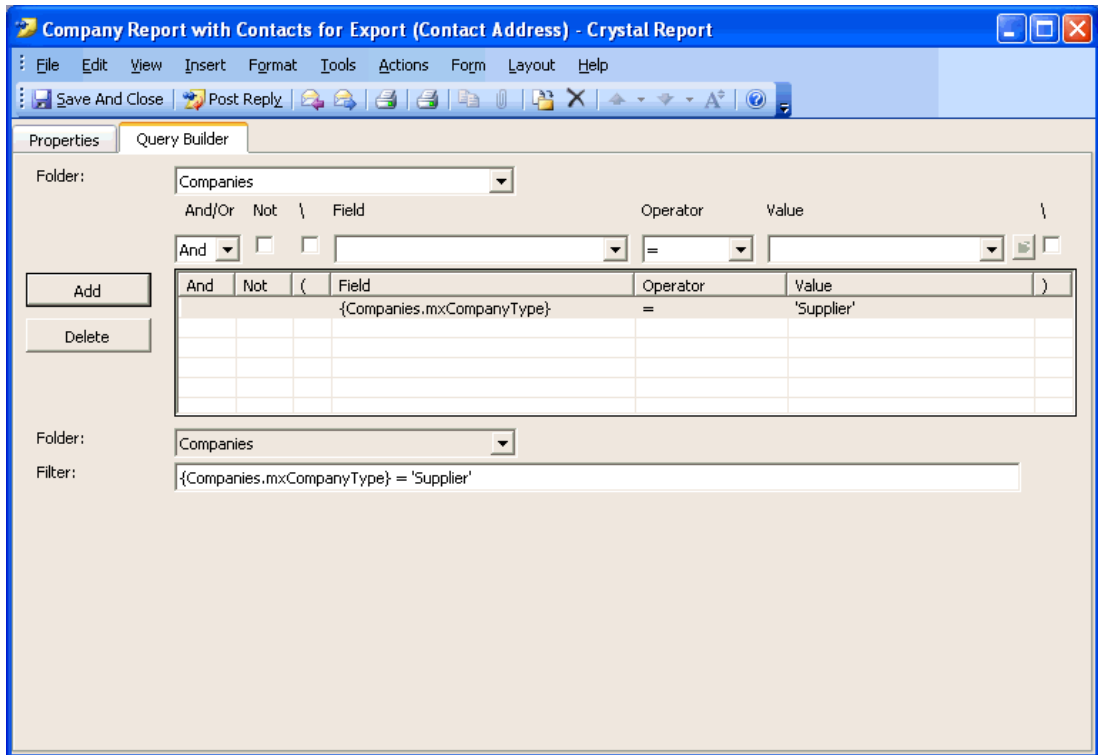
Send a personalised e-mail to all the golfers on your database from your suppliers asking them to each sponsor a hole on the day of the event.

Basic Steps:

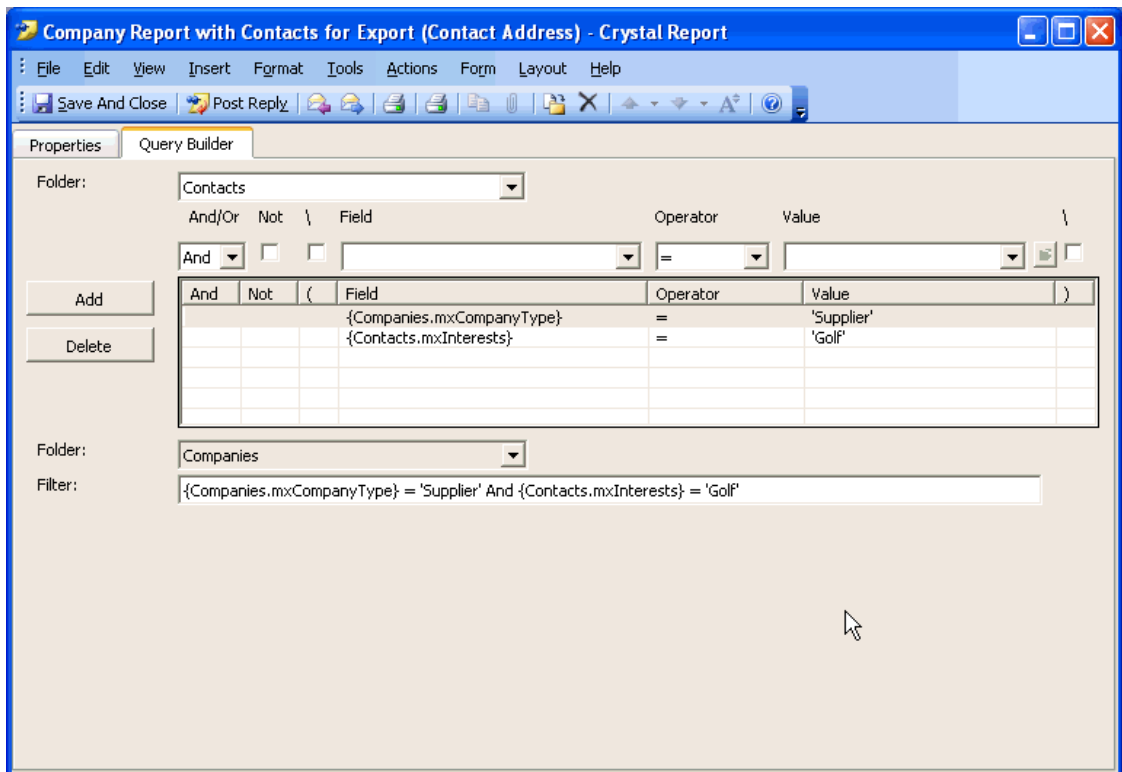
1. Click on the **Reports** Folder. Open the report entitled **Company Report with Contacts for Export (Contact Address)**. The following screen will appear:



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.



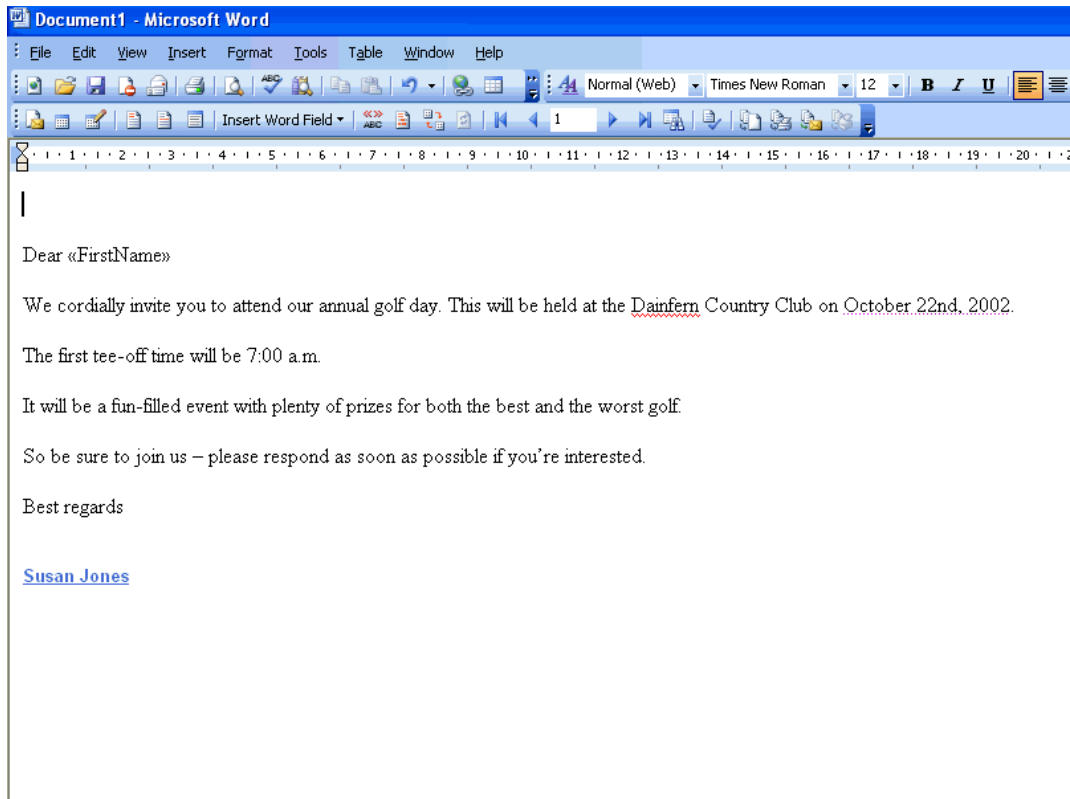
- Then add your condition for "Golfers" on the **Contacts** folder. Select the **Contacts Folder** from the Folder drop down list. Use the **Field** Picklist to select **mxInterests**. Select **Golf** in the **Value** field. Click on the **Add** button to add the second condition of the query.



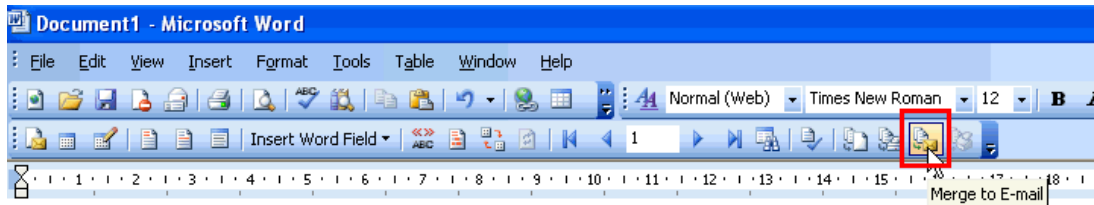
- Click back onto the **Properties** Tab:

The screenshot shows the 'Properties' tab of a Crystal Report. The report name is 'Company Report with Contacts for Export (Contact Address)'. The report type is 'Crystal Report' and the sub-type is 'Company'. The output is set to 'Disk File' with a paper size of 'A4 (9)'. The file format is 'Excel 8.0 Tabular (30)'. The file path is 'C:\Program Files\MXContactEE\Companies_with_Related_Contacts(Contact_Address).xls' and the primary folder is 'Companies'. The filter is '{Companies.mx:CompanyType} = 'Customer' And 'Golf' In {Contacts.mx:Interests}'. The mail merge checkbox is checked, and the template is 'MXContact_MailMerge_Excel_Data.htm'. The count is 0. The report file 'Companies_with_Related_Contacts_w_Contact_Addr_for_Export.rpt (18 KB)' is listed at the bottom.

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



11. Click on the Merge to Email icon.

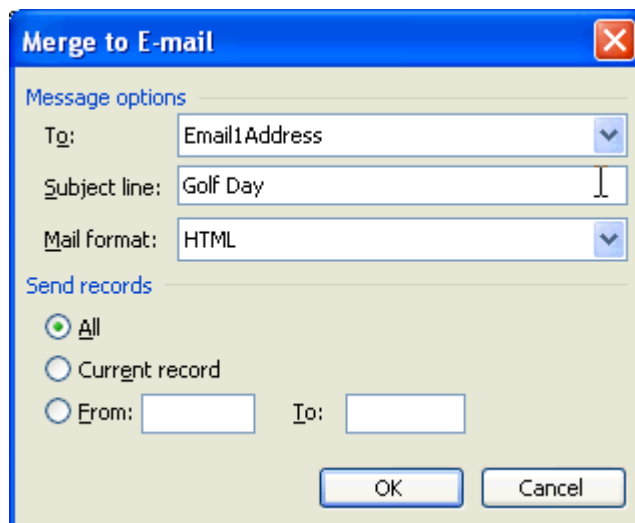


Dear «FirstName»

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

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

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.