C O N T A C T S

Just like your world, the HindSight software world revolves around people. After all, you really don't deal with a company. You deal with the individuals who make up a company, the people who hire you, advise you, provide services to you. Then there are other people you simply want to keep on file. These are your contacts.

Contacts helps you market your business, keep in touch and track transactions with your contacts. Contacts provides unsurpassed tools to search and select contacts so you can always find one or whole groups of contacts quickly and easily.

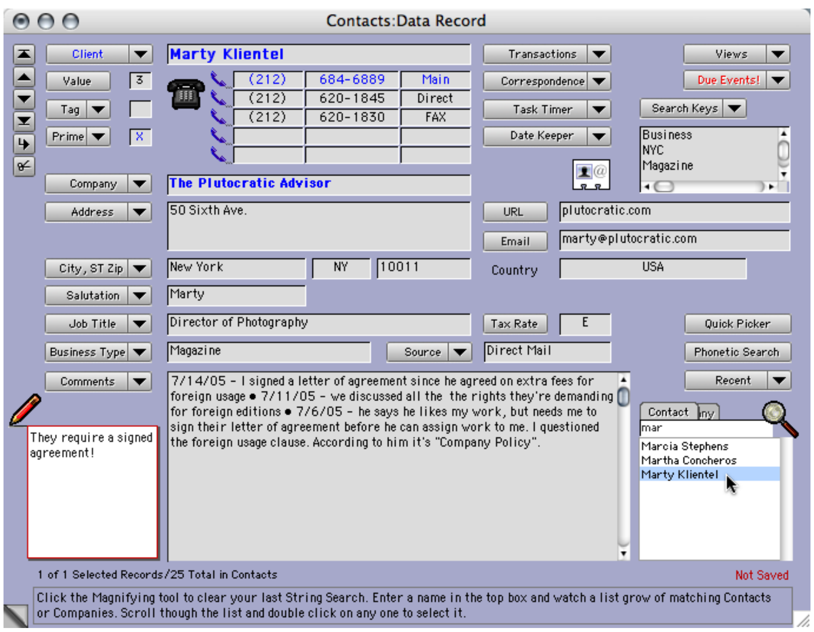
An Overview

Before launching into the "how to" of each component in Contacts, we'll provide a brief overview of the entire Contacts file and all of its fields.

Each person in the Contacts file has a separate listing, a record. Each contact's record has six, count 'em, six different windows that display information about that one contact: Data Record, Marketing Profile, Events & Notes, Billing & Shipping, Data Sheet and Contacts List. Four of the windows show limited amounts of the information about one contact at a time and two of the windows show information for a number of contacts at a time in a list format.

Data Record

When you open the Contacts file it always displays this window, Contacts:Data Record. Contacts is the file name. Data Record, is one of the file's windows. It shows basic information about one contact at a time and only a portion of the total data for the contact.



Field titles are buttons. Most are popup menus of choices, others trigger functions. This window is loaded with very powerful tools for managing your contact with other people. They're easy to use, and, trust us, you'll hardly touch their potential if you stop reading here. *Tip* ➧

Tip:
Notice as you move the cursor over items in the window, the Dynamic Help at the bottom of the window updates with a description of the item and its functions.

In the upper left corner of the window is a strip of buttons that appear throughout InView and StockView. The first four, those with the vertical arrows, move from one contact's record to another. The L-shaped arrow button adds a new Contact record. The scissors button deletes a Contact record. These buttons are explained more extensively in the Getting Started chapter in the front of your User's Guide.

The next set of buttons is topped with a popup menu for Category to help you classify a contact. Next is Value, to rate a contact, and Tag, to mark a contact for selections as part of a group of records. The last of this set is Prime, to designate a contact as being, at least temporarily, one of the most important of the persons among your Contacts.

In the lower left corner, the Pencil is a button, too. It activates Hot Notes, a feature to affix an electronic sticky note or an alert to a contact's record.

Across the bottom of the left side of the Data Record window is a counter telling you the number of selected records from the total number of records in the file. *Tip* ➧

Tip:
Changes are not saved until you choose to save them. Sometimes you don;t want what you've done preserved.

Note the red text in the lower right corner to alert you to the current status of the file.

In the central area of the Data Record window you enter or view the name, phone numbers, address, salutation, job title, sales tax rate, business type, source and general comments about this contact. Since this is just a quick tour, we'll leave further descriptions of these fields and their buttons for a bit later in this chapter in Entering Contacts Records.

Views Popup Menu

The Views popup menu, located on the right side of the Data Record, accesses additional parts of the information about one contact. One contact's record contains a wealth of data. Trying to look at it all in one window is daunting, to say nothing of confusing, so we've broken it into manageable parts and displayed it in four additional windows. Data Sheet, Marketing Profile, Events & Notes, and Billing & Shipping. (much more on all these later in this chapter.)

Events Popup Menu

Below the Views menu is the Events popup menu. Features tied to this menu help you locate contacts for whom you entered some date related notation. You expect we'll elaborate later in the chapter. You're right. *(See the section on Events & Notes for learning more about this important feature.)*

File Buttons

There are four file buttons immediately to the right of the Contact's phone numbers. These activate other HindSight files related to the Contacts file. The Contacts file remains open when you use these buttons though they transfer you to other files.

The Transactions popup menu initiates new transactions in the Worksheet and/or Stocksheet file, depending on what's installed in your HindSight folder. Transactions include invoices, estimates and submissions. Transactions popup also allows for quick and easy selection of posted reports, such as invoices, estimates and submissions for the active contact.

The Correspondence button opens a file for creating a letter, fax or Email to one or multiple contacts, and for selecting past correspondence to the active contact.

Task Timer opens, selects, or creates a new entry in the Task Timer file that tracks and times billable or unbillable activities, then factors charges if applicable.

Date Keeper opens the file for selecting entries for the contact or scheduling a new entry for the contact.

There are entire chapters on these files and each button's functions is described in detail later in this chapter under File Transfer Functions.

Search Buttons

The remaining buttons and fields at the right side of the window play roles in finding contacts records. Search keys uses keywords you assign, Quick Picker is in a limited set of fields and used for repeat entry of things you previously entered manually. Phonetic Search seeks out names that sound like what you type in.

The Recent popup menu lists the last 20 Contacts you've selected and viewed. Choose a name from the menu to quickly get back to their record.

The field with the magnifying glass searches for all Company names or Contact names containing letters you type in, as fast as you type them!*(See the section in this chapter on Searching for Contacts for details on using these features.)*

Finally, in the very corner, is the page corner button to move to the Next or Previous windows of this Contacts record. If you hold the Opt/Alt key, it skips to the second window in either direction.

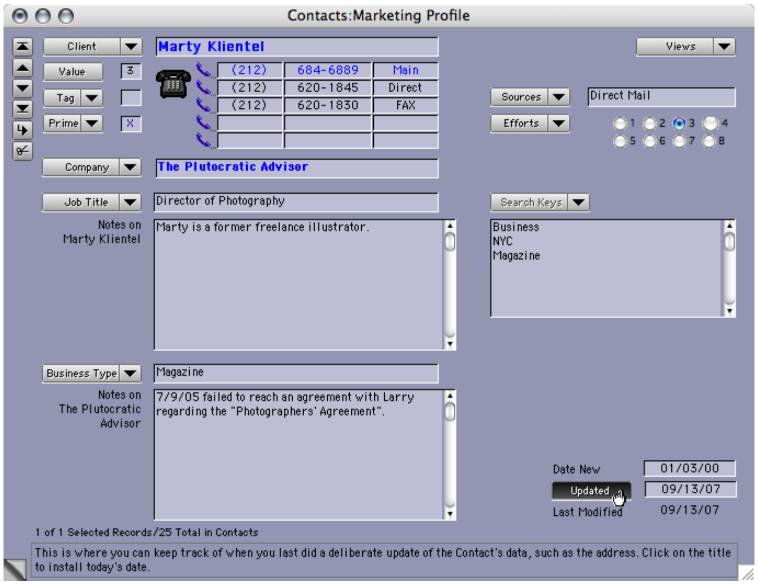
Marketing Profile

The Marketing Profile holds information to help you on marketing decisions about a contact.

To move from the Data Record to the Marketing Profile, choose it from the Views popup menu, or click on the lower portion of the page corner, which does the same thing as Next Window, Cmd/Ctrl-], and Previous Window, Cmd/Ctrl-[, in the Windows menu.

The Marketing Profile is the next window after the Data Record. Think of it as your records on 3x5 cards, the front of the first card about a contact would be our Data Record and the Marketing Profile would be on the back of that first card... same contact, more info.

Some of the information from Data Record is carried over to the Marketing Profile, for instance, the Contact Name, Company, Address and Phone Numbers appear in the upper left corner of this window so you know whose profile you are looking at. You again see the Category, Value, Tag check box and Prime check box, same as in the Data Record window of this contact record.



There is other information here, carried over from the Data Record, but here it has a bit more elbow room. Below the Company name is the Job Title followed by a large cell for storing any sort of information about the contact, maybe a birth date, spouses name or a preference for Parakeets over Macaws.

Continuing down, you see Business Type. It and its menu are more repeats from the Data Record. The menu helps you enter and search this data. Company Notes is for comments about the person's company. These notes are shared by others in the same company.

At the top right is the View menu to switch to the Data Sheet, or return to the Data Record or move along to the Events & Notes window or Billing & Shipping window.

The Sources field lets you track how you came across this contact. Its menu helps you enter and select Sources information. It also generates a chart of the Sources entries.

Efforts is a row of check circles that help you remember how many times you have tried to convince this contact to hire you. We all have our limits. The word, Efforts, is a popup menu. That means there's more to be seen if you depress the mouse button on that word.

Next is Search Keys, one of the powerful advantages of HindSight software. Enter key words that further identify and cross reference this contact. This menu, too, enters and selects data.

Date New is automatically entered when you create a contact's record but you can change the date if you need or want to.

Updated is a button. Click on it to enter the current date when you deliberately change essential information, perhaps the address or a phone number, for this contact. This date tells you how current the data is. This date, too, can be changed manually.

Last Modified is automatically dated when you make any changes to the contact's record.

There again, in the corner, is the Page Corner button to move to the Next or Previous window of this Contact record.

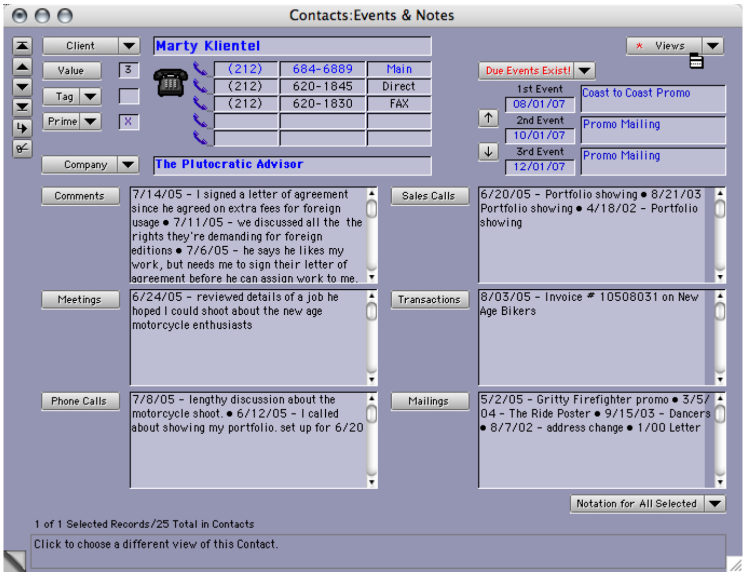
Events & Notes

In the Events & Notes window, again, the Contact's Name and Company information are at the top. The buttons and cells at the left are the same as in the other windows too.

The upper right corner has several ways to manage events. The Events buttons and cells schedule as many as three things: promotional mailings, follow-up calls or whatever. The Events popup menu helps you select from the people or tasks attached to these Events.

The Comments, Meetings, Phone Calls, Sales Calls, Transactions and Mailings cells let you organize and maintain a History of your interactions with a contact. Much of the contents is transferred here from another file. Each has a button to insert new, date-stamped entries. Below Mailings is the Notation for Selected popup menu to make the same date-stamped entry for many Contacts at once.

In the bottom corner is that Page Corner button to move to the Next or Previous windows for this Contact.



Billing & Shipping

The Billing & Shipping window displays additional addresses (physical and virtual), shipping information and a specialized catch all.

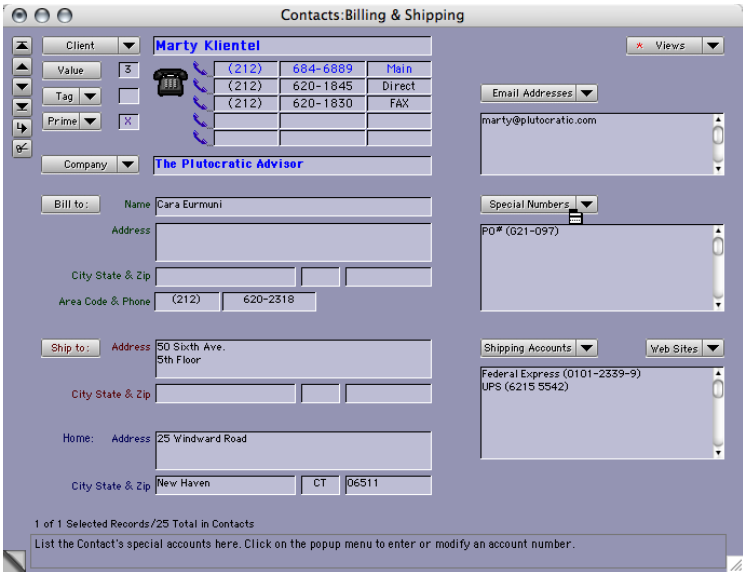
Let's skip telling about all the parts you've seen before. Below the Name and Company cells, the Billing & Shipping window has a place to enter billing and shipping addresses IF, AND ONLY IF, they differ from the contact's address entered in the Data Record window. Any parts of the address that remain the same here as on the Data Record's address do not need to be entered again. Is this what they mean by "intelligent software"? We think so.

Below the Views menu, Email addresses not only stores the contact's Email information, the Email address is used when you use Contacts and the Correspondence file to create Email.

Special Numbers handles Social Security Numbers, Tax Exempt Numbers, standing Purchase Orders, Credit Limits, Vendor defaults and so on. These Special Numbers are carefully formatted for access by other InView & StockView files. Its menu helps you properly format these entries so they are recognized for their particular purposes.

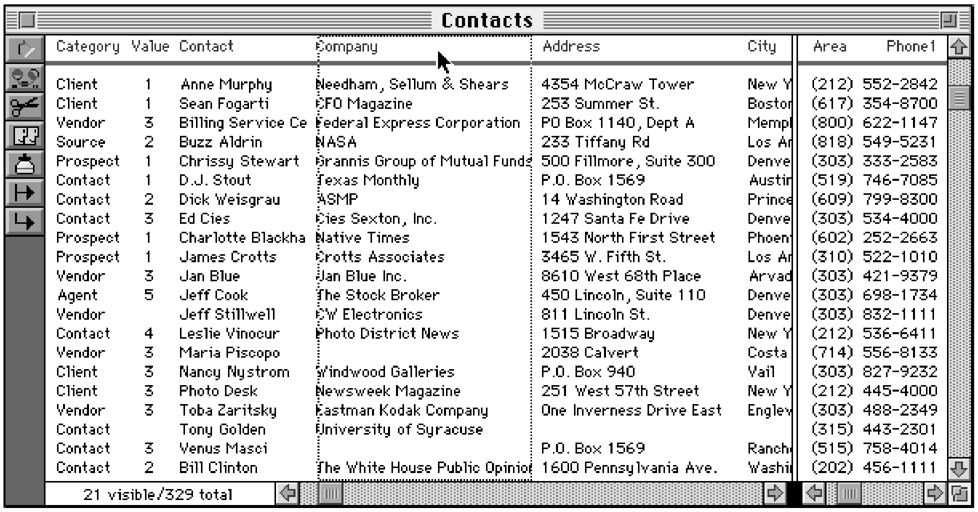
Shipping Accounts is for the contact's account numbers. The menu helps format the numbers properly to suit the four built-in airbills forms. These forms are accessed by the Airbills popup menu.

Again, use the Page Corner button to move to the Next or Previous windows for this Contact.



Data Sheet

The Data Sheet is the place to see everything in its rawest form. This is the one place where you can look through all of one contact's data strung out in a row. As a matter of fact, you can see all the data for all your contacts in this window if you want to, but, to see it all, you have to scroll a long way to the right or split the window and a long way up or down to see all your contacts.



Category	Value	Contact	Company	Address	City	Area	Phone1
Client	1	Anne Murphy	Needham, Sellum & Shears	4354 McCraw Tower	New Y	(212)	552-2842
Client	1	Sean Fogarti	CFO Magazine	253 Summer St.	Bostor	(617)	354-8700
Vendor	3	Billing Service Ce	Federal Express Corporation	PO Box 1140, Dept A	Mempl	(800)	622-1147
Source	2	Buzz Aldrin	NASA	233 Tiffany Rd	Los A	(818)	549-5231
Prospect	1	Chrissy Stewart	Grannis Group of Mutual Funds	500 Fillmore, Suite 300	Denve	(303)	333-2583
Contact	1	D.J. Stout	Texas Monthly	P.O. Box 1569	Austir	(519)	746-7085
Contact	2	Dick Weisgrau	ASMP	14 Washington Road	Prince	(609)	799-8300
Contact	3	Ed Cies	Cies Sexton, Inc.	1247 Santa Fe Drive	Denve	(303)	534-4000
Prospect	1	Charlotte Blackha	Native Times	1543 North First Street	Phoen	(602)	252-2663
Prospect	1	James Crotts	Crotts Associates	3465 W. Fifth St.	Los A	(310)	522-1010
Vendor	3	Jan Blue	Jan Blue Inc.	8610 West 68th Place	Arvad	(303)	421-9379
Agent	5	Jeff Cook	The Stock Broker	450 Lincoln, Suite 110	Denve	(303)	698-1734
Vendor		Jeff Stillwell	CW Electronics	811 Lincoln St.	Denve	(303)	832-1111
Contact	4	Leslie Vinocur	Photo District News	1515 Broadway	New Y	(212)	536-6411
Vendor	3	Maria Piscopo		2038 Calvert	Costa	(714)	556-8133
Client	3	Nancy Nystrom	Windwood Galleries	P.O. Box 940	Vail	(303)	827-9232
Client	3	Photo Desk	Newsweek Magazine	251 West 57th Street	New Y	(212)	445-4000
Vendor	3	Toba Zaritsky	Eastman Kodak Company	One Inverness Drive East	Englev	(303)	488-2349
Contact		Tony Golden	University of Syracuse			(315)	443-2301
Contact	3	Venus Masci		P.O. Box 1569	Ranch	(515)	758-4014
Contact	2	Bill Clinton	The White House Public Opinio	1600 Pennsylvania Ave.	Washi	(202)	456-1111

If this was the only way to look at a contact's data, you'd be less than thrilled with our software. It's often useful, though, to work in this window. Field widths can be adjusted and the window can be split to see widely separated fields simultaneously. There are other handy things about this window and we'll talk about them in full later in this chapter.

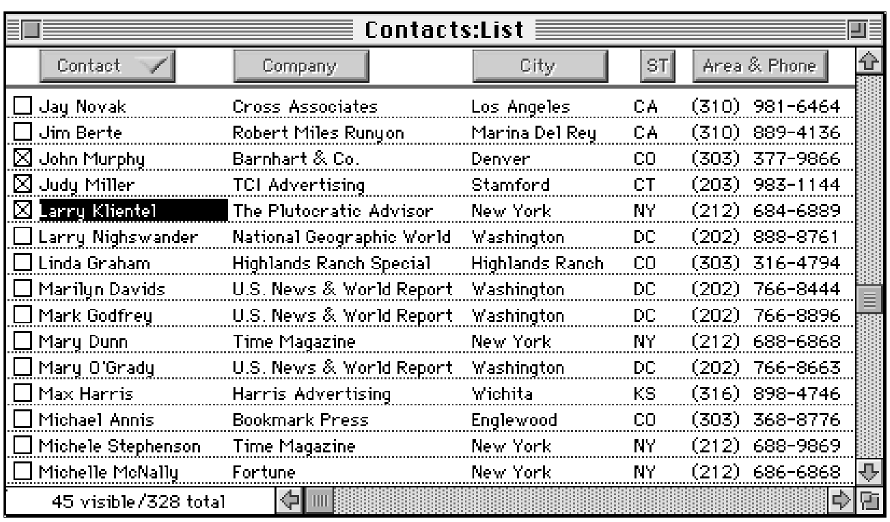
Note: Because of the adjustable field sizes in the Data Sheet, it's necessary to double click on a data cell in order to activate it.

Contacts List

The Contacts List is a window that shows all the selected records in a list similar to the Data Sheet but with fewer fields. It's a more concise view of the most pertinent information: Name, Company, City, State and Phone numbers.

At the left side of the window are Tag boxes to mark or unmark contact's records. The button heading each of the fields sorts that field in an ascending order. The Contact heading pops up to give you a choice of sorting by Last Name or by First Name.

Contacts List is a very handy window for working through a call list or selecting and sorting by locale. The window is easily positioned to share your screen with the Contacts Data Record.



	Contact	Company	City	ST	Area & Phone
☐	Jay Novak	Cross Associates	Los Angeles	CA	(310) 981-6464
☐	Jim Berte	Robert Miles Runyon	Marina Del Rey	CA	(310) 889-4136
☒	John Murphy	Barnhart & Co.	Denver	CO	(303) 377-9866
☒	Judy Miller	TCI Advertising	Stamford	CT	(203) 983-1144
☒	Larry Klientel	The Plutocratic Advisor	New York	NY	(212) 684-6889
☐	Larry Nighswander	National Geographic World	Washington	DC	(202) 888-8761
☐	Linda Graham	Highlands Ranch Special	Highlands Ranch	CO	(303) 316-4794
☐	Marilyn Davids	U.S. News & World Report	Washington	DC	(202) 766-8444
☐	Mark Godfrey	U.S. News & World Report	Washington	DC	(202) 766-8896
☐	Mary Dunn	Time Magazine	New York	NY	(212) 688-6868
☐	Mary O'Grady	U.S. News & World Report	Washington	DC	(202) 766-8663
☐	Max Harris	Harris Advertising	Wichita	KS	(316) 898-4746
☐	Michael Annis	Bookmark Press	Englewood	CO	(303) 368-8776
☐	Michele Stephenson	Time Magazine	New York	NY	(212) 688-9869
☐	Michelle McNally	Fortune	New York	NY	(212) 686-6868

Entering Contacts Records

Before you can do anything with your contacts, you've got to get them into the Contacts file. It's time to examine the places where you put information into the Contacts file and the buttons and tools most directly related to that process. Following that, we'll discuss how to make the most of that information. Now, down to the business of entering data! You can hardly wait, right?

Data entry is Tab driven. That means if you use the Tab key to confirm what you type in a field, the cursor automatically jumps to the next field, ready for typing.

You can use the Tab key to confirm entries in fields. The Tab key activates the next cell in the sequence. Some cells can hold more than one line of information. To create a second, third or more lines, use the Return/Enter key. Close any cell on any computer with the Tab key; close any cell with the Enter key on a Macintosh; close single line cells only with the Enter keys using Windows. The Enter key closes the cell without going to the next cell on the Macintosh; Enter closes single line cells and returns to the next line on multiple line cells using Windows.

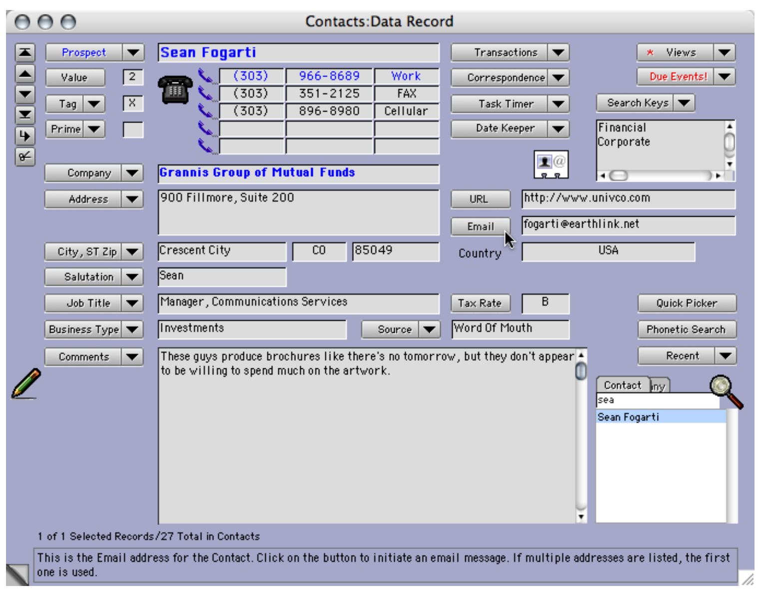
The Tab sequence programmed into Contacts Data Record is: Name, Company, Address, City, State, Zip, Country, Area Code 1, Phone 1, Memo 1, Area Code 2, Phone 2, Memo, Area Code 3, Phone 3, Memo 3, Area Code 4, Phone 4, Memo 4, Area Code 5, Phone 5, Memo 5, URL, Email, Salutation, Job Title, Tax Rate, Business Type, Source, Search Keys, Value.

You can use the mouse to click from place to place if you want to skip around. Nothing says that you must to fill in every cell just because it's there. We tried to give you more places than you'd really need.

Note: There are settings to modify the behavior of many Contacts fields. Field Attributes, in the Windows menu, opens a window where you control Clairvoyance, capitalization, permit or forbid duplicates. *(See Field Attributes, later in this chapter, for a complete description of these controls.)*

Data Record

To enter a contact into the Contacts file, type Cmd/Ctrl-E, or select Enter New Contact from the Windows menu, or click on the L-shaped arrow button in the tool palette. After a momentary pause, an empty record appears and the Name cell is highlighted, ready for you to type in the person's entire name all in the same cell.



Contact Name

With the cursor in this cell, type the contact's full name. If you've already entered a number of records and accidentally try to enter one of those persons again you are warned. Contacts is preset to allow no duplicate names. ➧ *Warning!*

Company & Company Popup Button

Moving along, use the Tab key to skip down to the Company cell.to enter this contact's company name. You may have many records with the same company name. Tab again to move on to the Address. ➧ *Tip*

The button bearing the title for the Company cell is actually a popup menu with a wealth of options.

Warning!

Rather than ID numbers, InView keys on people's names. People with identical names working for different companies (Bob Smith: Fabu Agency and Bob Smith: Paradise Magazine) will create problems when it's time for invoicing or other functions which require critical name matches, so you need to find a unique way to enter your second Bob Smith. You could use Robert Smith, Bob B. Smith or Bob Smith with two spaces between first and last names. The idea is to distinguish between individual records and HindSight does that in the Name field.

Tip:

When you enter a company name already entered in the file, Clairvoyance beeps and fills in the rest of the name as soon as the name is recognized. At this point, if you hold down the Opt/Alt key and hit either Enter or Tab key, the Address, City, State, Zip Code, first Area Code, first Phone Number, Business Type, Sales Tax Rate and Company Notes are automatically entered for you. Slick! If, instead, you hold down the Shift key, the Billing and Shipping information is entered. We promised to make your life easier.

Select…

Select… opens the standard search window, ready for you to enter the name of any company you're seeking. It's the same as choosing Select a Company from the Search menu.

All xxx Contacts

This selects all contacts in your file who work for the same company as the one in this record.

Next is a list of all the contacts in your database who also work for this company. Selecting a name from the list selects that person's record. Even if you don't select a name from the list, you can at least see who else in your records works for that company.

New Entry, Same Company

New Entry, Same Company duplicates the currently displayed record and adds another like it for you to enter the name of a new Contact for the company. In this new entry some data is kept and some cleared. On most computers, the process requires several seconds. Once it's done, you should visually check to see that phone numbers, shipping addresses and such are what they should be for this new entry.

Lookup and Install All xxx… Info

Lookup and Install locates the first entry in the file for the company and updates the current Contact's address, first phone number, Business Type, Tax Rate, and Company Notes. If you hold down the Shift key while making this choice, the billing and shipping addresses are also updated to match. This is exactly the same as if you held the Opt/Alt and/or Shift key while entering a Company's name. This is useful when entering a new contact for the company or when a contact moves to another company. You see, HindSight software saves you time, and time is money.

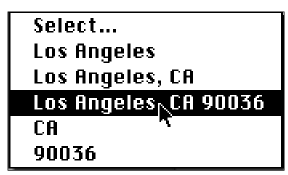
If you get unexpected results, keep in mind that the information hunt starts at the top of the list of all contacts in the file, selected or not, and uses information from the first one it finds with the same Company name. You can control the first match by sorting the file in any number of ways.

Address

Address can hold more than one line of data. To enter a second or third line to the address, use the Return key as you type the information. Notice the button to the left of the address. Clicking on the Address button copies the Contact name, Company, Address, City, State and Zip Code to the Clipboard for pasting elsewhere. *Tip* ➧

City, State, Zip Code and Country

When you enter a City name that was entered before in another record, that Clairvoyance feature wakes up and enters the State or Province. If it's the wrong state (There is more than one Dover in the world.) Tab to the State cell and enter the right name, then on to the Zip Code and Country.



The City, ST, Zip title is a popup menu. The first option, Select… opens a search window, where you enter the name of a city to select. The remaining choices in the pop-up menu select various combinations of City, State or Zip code entered in the current record. *Tip* ➧

Phone Numbers

If you're still using the Tab key, you'll now hop back up to the place where you can enter as many as five phone numbers. Each of the five is divided into three parts; the Area code or country code or country-city code, the phone number is second, and the phone memo (such as Office, or Cell, or Fax) is third.

Area Codes

To help you enter data quickly and easily, HindSight software installs parentheses if you type three numbers for the Area Code. The parentheses are installed after you Tab to the next field. If you have contacts in foreign lands, type in any sequence of number required to call them. The parentheses will not be plugged in unless there are exactly three numbers in this cell. *Tip* ➧

Phone Numbers

HindSight software also enters the dash in phone numbers. Type all seven digits, hit the Tab key and that's it. 555 dash 1234 (555-1234). *Tip* ➧

Tip:
Hold the Opt/Alt key down and click the word Address to copy the information to the clipboard. This, however, switches the Company name above the Contact's name.

Tip:
With Zip Magic! in your folder, hold down the Opt/ Alt key as you Tab out of the Address cell. This skips past the City and State right to the Zip Code cell. You fill in the Zip Code and ZipMagic fills in the City and State for you.

Tip:
If you omit the Area Code on the first number, when you enter the rest of the Phone Number, InView inserts your Local Area Code, which you set in the Dialing Preferences in Flow Chart.

Tip:
As you enter a second or third phone number, Tab past the area code if it is the same as the first one you entered.

Memo
Memo is to place an identifier on the contact’s phone numbers, such as home, office or Fax. Memo can also be used for an extension number.

Dialing
The five receiver icons to the left of the Area Code cells are for dialing. InView dials the phone when you depress the mouse button on the icon to the left of the number you want to call. YaaHoo! A pop-up menu springs forth, you can pick an option from the possible dialing combinations or, InView checks your Local Area Code, entered in Dialing Preferences from Flow Chart, decides whether the call is long distance or not and highlights the most likely choice, the one you probably would make anyway. If you disagree with InView’s choice or have a special situation, like Long Distance calls in your own Area Code, you make the selection.

In the Flow Chart’s Dialing Preferences window you not only tell InView your Area Code, you also select a preferred Dialing Mode and more. Phone dialing is an integral part of several InView and StockView files, therefore, the Dialing Preferences instructions are in the Flow Chart chapter rather than in any one or all of the file chapters.*(See the Getting Started chapter for details on using the auto dialing.)* .

Dialing Mode
There are four dialing modes: Tone, Pulse, Audio or Verbal (yes, you can hear the number spoken out loud as you dial! and we don’t mean beep, beep, beep) Choose the dialing mode by depressing the mouse on the icon to the left of the five receiver icons then select from the pop-up menu. There’s only one catch to the automatic dialing stunt. You must have either a modem, any baud rate, or an audio dialing device connected to your computer.

Note: Changing the Dialing Mode here is only a temporary change. The Dialing Mode you set in Flow Chart is reestablished the next time you open Contacts. Choose Dialing Preferences if you want to change your preferences in the Flow Chart.

Export Fax Text
The Contacts file has the ability to export data for use in a fax/modem phone book. It can include all Contacts, or just a set of Contacts that you've pre-selected.

The feature is accessed by clicking on the popup menu for selecting the dialing mode. Depending on your current setting for the dialing mode, this is usually depicted as a telephone icon just to the left of the receiver icons used for dialing the phone. The bottom of this popup menu lists "Export Fax Text". The exported data is saved as a text file named "Contacts Fax Text" in the same folder as the Contacts file.

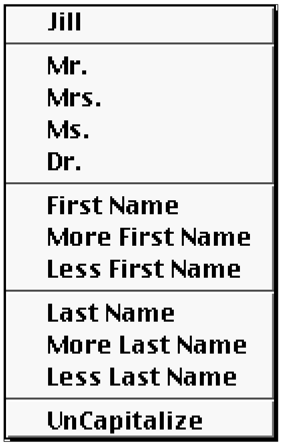
URL
URL is the web site address of this contact. Click on the URL button to launch your browser and go to the listed web site

Email
The contact’s Email address is also on the Billing & Shipping view, where there is room for more than one email address. You can enter the first,, or primary, email address here.

Click on the Email button to launch your email software where a new email message is automatically initiated with the Contact’s email address installed.

Prepared email messages can also be sent individually to any number of selected contacts by holding the Option key as you click on this button. See Bulk Email via Eudora at the end of the Contacts chapter.

Salutation
Salutation is the name you want to use in correspondence with this person.



A name was automatically entered here when you typed in the contact’s Name. It is the first word you typed in the Name field. If that’s not the salutation you want, change it now or at any time.

To change the Salutation, depress and hold the mouse on the Salutation pop-up menu and there is a list of choices. Select one or type in the one you want to use.

The Correspondence file uses this salutation when you start a letter to this contact. If you enter "Bill", a letter addressed to your contact, William T. Goodman, reads "Dear Bill" rather than "Dear William T. Goodman". You could also enter "Mr. Goodman" to be more formal.

The best way to learn about this feature is to play around with the options to see the results. You can revise the salutation as you get to know a contact better and want to be chummy.

If your Contact names are entered in all capital letter, the automatically entered salutation ends up capitalized too. Uncapitalize, in the Salutation popup menu, converts the salutation to just having first letters capitalized and the balance in lower case.

Job Title

The next cell is for the contact's Job Title. Although it initially fires blanks, the Job Title menu builds itself using existing Job Title entries. Every new Job Title you type in the cell is immediately added to the Job Title menu.

As the menu grows, you can make new entries by selecting from the menu rather than by typing them. If the Job Title you need is not in the menu, type it into the cell. That adds it to the menu for next time you enter a contact with the same Job Title. Any item chosen from this menu is entered in the cell replacing what's already there. Make a menu choice while holding Opt/Alt key to select all contacts with that Job Title. Hold the Shift key to Select Additional, or add to a previous selection. And, the Cmd/Ctrl key, followed my a menu choice, opens a dialog window that allows you to change the menu choice to something else. This Cmd/Ctrl change, changes the Job Title on all Contacts who have that Job Title. *Tip ➧ Tip ➧*

Tip:
Consistent Job Title entries lets you quickly select all contacts with a particular type of job. Avoid using synonyms. Don't enter Director of Communications for one contact and Communications Director for another, in spite of what it says on their business card. Leave creative titles to them and cut to the quick

Tax Rate

If you don't charge Sales Tax leave this cell alone or enter a zero and Tab to the next cell. If you do charge Sales Tax, what you enter here depends on how seriously you need Sales Tax reports.

The simple method is to enter the percentage rate here. Then it is calculated and applied to your Invoices for this contact. If your tax rate is six and three quarters percent, no need to enter the point zero six stuff. Simply type the six, period, seven and five 6.75.

The serious method (but also simple when it's set up) is to enter an alpha character representing the Tax Code for this contact. Texans and Californians are likely to use this method.

Simple or serious, if you tax more often than not, set a default entry for all new contacts. Click on the Tax Rate button. When the dialog box appears, enter the rate you use most frequently.

Either way, you get detailed Sales Tax reports from the Receivables file. The Tax Codes go from detailed to minutely detailed, but that's the way some taxing entities like it. *(See the very small chapter on Tax Codes for more information on these formats and their implications.)*

Tip:
To make inconsistent data entry consistent, the popup menus for Job Title, Category, Business Type, Source and Search Keys each have a Change feature. When you hold the Cmd/Ctrl key while making a selection from these menus, a dialog window opens showing your selection and asking you to enter what it should be changed to. Make your entry and press Enter. All records with your selection are then changed to the new content.

Hold the Opt/Alt and make a menu choice to select all Contact with a certain Job Title, category, Business Type, Source, or Search Key.

Hold the Shift key and make a menu choice to select additional, or add to a previous selection.

Business Type

This is the place to enter a generic, yet specific, description of the business this contact is involved in. By carefully defining the sorts of businesses your contacts have, you can locate sets of contacts. Is it easier to select one, Ad Agencies, or Design firms, Graphic Design, Video Production, and Print Media. You get the idea. This is a good time to examine the kinds of businesses you want to group into a bundle for marketing purposes and then identify your contacts' business types. Choose descriptions that serve you best. Too general a description can be as big a roadblock as too detailed. And above all, be consistent.

The Business Type menu lists all entries previously made in other records. Choose one from the menu to enter it in the cell. Hold the Opt/Alt key and choose a menu item to select all records with that Business Type. Sounds just like the Job Title doesn't it?

Source

Source lets you track where you get your business and what promotional efforts are working. You can enter the name of the person who referred you, how you first met this person, the title of the promotional piece that caught their attention, whatever works to identify the bait that worked. Again, be consistent. It's vital.

If you like, you can enter a lot of data here, but being concise is to your advantage. You can chart your sources. That part comes when we describe the Marketing Profile window. Brief entries read more easily in charts and the Sources menu which builds just like the Job Title and Business Types menus.

Search Keys

The Search Keys cell is for cross referencing or key wording. It lets you assemble specialized groups of records. These entries can be expanded notes about the business type, the kinds of accounts handled or the products manufactured. Regions of the country, such as NW or Bay Area, are useful, too. For instance, enter an ad agency as Advertising National or Advertising Local. For the same agency you might also include food, Nabisco, consumer, Midwest or any other descriptive words you think helpful in finding this contact later. How about a completely different tack? Use Search Keys to indicate subjects of interest to the contact. When you have new promotion or a story proposal, you can quickly select all the contacts who might logically be interested.

Tip: Search Keys can be modified for several Contacts at once. Hold the Cntl/RClck key while making a selection in the Search Keys popup menu and your choice is added to all of the currently selected Contacts. Hold the Opt/Alt key while choosing an item in the menu and all Contacts with that Key in their Search Keys list are selected.

Type anything directly into the cell. After you make two or more Search Keys entries, the menu develops a list of your cross-references. Choose something from the menu and it is added to any other cross references already in the Search Keys field. ➧ *Tip*

Hold the Opt/Alt key and make a choice from the list. All records with that Search Key are selected. Boy, that's easy! And a valuable marketing tool, so don't overlook it.

Hold the Cmd/Ctrl key and change a list choice from what it is to something else. All records with that Search Key are changed.

As with all fields in the Contacts file, you can conduct searches of the Search Keys using the Search menu.

Category

New entries in Contacts start with the contact's name. The Tab key takes you all over the place, ignoring the very first part of the Data Record. Category, however, is not included in the Tab sequence. It is a very important feature to classify your contacts. At anytime, use the mouse to set a Category.

When you create a new entry in Contacts, the Category displays the default Category. Contacts ships with a default Category set to Contact. You can set your own default by choosing Set Defaults from the Category popup menu, or you can select another Category from the menu.

There are five Category choices in a pop-up menu installed in Contacts Data Record as shipped: Contact, Client, Prospect, Vendor and Other… (you fill in the blank). This is where you identify each contact in a general way for searching and sorting later. You have complete freedom in deciding what categories you want to have and how many.

As shipped, the categories are:

Client	someone you consider an active customer
Prospect	someone you hope to make an active customer
Contact	a peer, mentor, pal or other associate
Vendor	your suppliers
Other…	miscellaneous (you fill in the blank)

The name and number of categories is your option using Other…, or you can stick with ours if they work for you.

Category is yet another way to pigeonhole contacts for easy selection later. We know that may sound impersonal, but it's good business sense and increases your ability to treat people more personally. ➧ *Tip*

Tip: It's ultimately up to you to decide who goes where and how they rate, but assigning a Category and a Value help you search and select specific groups of contacts. For instance, you may want to throw a party for all of your favorite people. You could select all of your contacts rated less than 3. This gives you all of your 1 and 2 Value contacts. Okay, so it selected 373 people and your party room can only hold 42. You can use the Select and Select Within functions to whittle the list down using tighter criteria, such as those whose Value is 1 and Category is Client. The same procedures work for compiling a list for promotional mailings or telephone calls. Why mail one of one hundred expensive promo pieces to that active Client you can't stand, if, instead, it could go to a good Prospect? These are powerful marketing tools combined with your imagination.

Value

This field lets you rank each contact for importance to you. You get to decide whether perfect is designated as 1 or 10 or higher. Just be consistent. You can set your own default for new Contacts by holding the Shift and Opt/Alt keys while clicking the Value button.

Type in the numbers or click the mouse on the Value button to cycle downward, 10 to 0. Hold the Opt key or Alt key while you click and cycle upward to 11 and beyond. We don't actually know how far it will go, but it's farther than we have the patience to pursue.

Tag

Tag is a simple and effective way of assembling records into a group which may have no other common element for selecting them or for paring down a large group of common records to a smaller, more manageable group. Collect widely dissimilar records into a group for calling or mailings or any other purpose you devise. The most basic use of tagging is to Tag a set of contacts, then Select them. Tag includes or excludes records from a specific group of records.

As you enter a record, chances are you won't Tag it. That typically comes later. You surely will find sophisticated ways to use Tag.

The Data Record, Marketing Profile, Events & Notes, and Billing & Shipping windows all have Tag boxes and menus. Click the Tag box in any of these windows to put an X in it. A second click clears the X.

Click on the Tag popup menu and a list of options appears for Tags: Select All Tags, Select All Untagged, Tag All Selected, and Clear All Tags, Clear All Unselected, Clear Selected Tags.

Tag/Untag

The first choice in the menu toggles between Tag and Untag. It's the same as clicking on the Tag box.

Select All Tags

Select All Tags selects every tagged contact.

Select All UnTagged

Select All UnTagged summons up all untagged records.

Tag All Selected

Tag All Selected tags every currently selected record.

Clear All Tags

This removes tags from all records, even those not selected, without disrupting any selection you have made.

Clear All UnSelected Tags

This removes tags from records which are tagged but unselected at the moment you choose Clear Unselected Tags.

Clear Selected Tags

This option clears tags only from the records that are currently selected. Unselected records with tags are unaffected.

By combining methods of selecting records, you can be a real power user. Before you go on that promotional trip to Texas, Select all your contacts identified as Client in Dallas. Tag All Selected. Next, select all Prospects in Fort Worth rated 1 or 2 and Tag All Selected again. Now you have the beginnings of an agenda when you get there. Repeat the tagging process several times to include additional groups of specific contacts' records: Friends, ladies named Lu living in Grapevine, people in Dallas with Manufacturing in their Search Keys. When you've tagged everybody you might want to see while you're there, Select All Tags and you have the final list of all the records you tagged. You may not have enough time to see them all, but you'll sure dazzle your friends with supreme organization. *Tip* ➧

> *Tip:* You can use Select Tags in the Search menu to select all tagged records and clear all tags by holding down the Opt/Alt key while choosing Select Tags from the Search menu. This is particularly handy when working in a window that does not contain a Tag box, such as the Data Sheet.

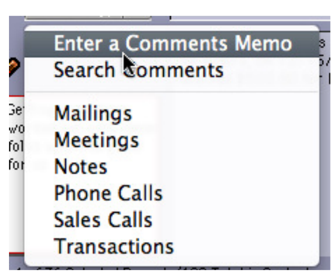
Prime

Prime has a familiar menu and checkbox. Just like Tag. It has a very different function though. Prime refers to your primary contacts, the select few who, at least for the moment, are the most important people in the entire Contacts file. A click on this checkbox places an X there. A second click clears it. We know that's not so exciting, but wait, there's more.

Any contact with an X in the Prime checkbox is listed in the Prime menu. Choosing a name from the menu immediately pulls up that contact's record. And we do mean immediately.

While a big project is under way or when you're busy playing phone tag with someone, you can add them to this Prime list. They can be removed by simply clearing the X. You may want your stock broker or rep there all the time, others may be there only for an hour or two.

Comments



Have you noticed we never tabbed to the biggest cell in the Data Record window? Comments is a very special cell and behaves differently from any other. In fact, the Tab key never gets to it.

Each time you open the Contacts file, this cell's title is Comments. A while back we drew an analogy: The Contacts windows are similar to a stack of 3x5 cards, each with information about one Contact. Clicking on the word "Comments" opens a menu of other cell titles (fields) from another of those cards:

Comments, Meetings, Phone Calls, Sales Calls, Transactions and Mailings. This is data really stored in the Events & Notes window. You may look at or enter or change data in the any of these cells while you are in the Data Record window.

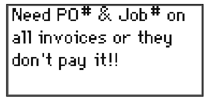
When you make a selection from the menu, the title, “Comments,” and the text box contents change to display the information from the cell you choose. This is a lot clearer as you actually do it, but we think you’re going to agree, it’s one useful feature.

The choice at the top of the menu, Enter a --- Memo, changes every time you make a selection. You can refer to, revise or add an automatically dated memo to the selected data cell. Memos are inserted in front of any existing entry in the cell. Hold the Opt/Alt key and choose the memo function to add a time stamp, as well.

Choose Search to search whichever of those fields is currently being displayed here.

We cover these fields more thoroughly in Events & Notes, the window where all these fields are accessible at once.

Hot Notes



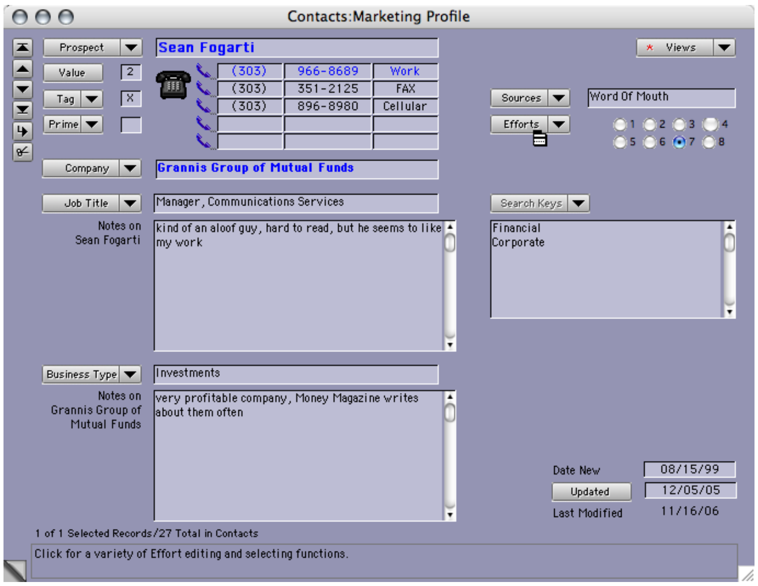
Hot Notes are short memos in a red box, that appears in the Contacts Data Record window down where you see the pencil icon. They continue to appear each time you open the Data Record window of a contact with a Hot Note attached. It’s an “in your face” reminder, until you clear the note.

To enter a Hot Note, click on the pencil and choose Enter Hot Note from the popup menu that appears or select Enter Hot Note from the Windows menu. An empty Hot Note frame opens for you to enter the note.

To change a Hot Note click in the text of the Hot Note and type as you would in any other text cell. To remove a Hot Note click in the text and press the Delete/Backspace key or click on the pencil icon and choose Clear Hot Note from the popup menu.

Marketing Profile

You clicked on the page corner or selected Marketing Profile in the Views menu and now you’re looking at that window, another 3x5 card, if you’re still following our index card analogy.



The Marketing Profile displays information to help you target and track your marketing. Searches of these fields are extremely valuable. You can create tailor-made lists for mailings, telephoning and other direct marketing.

The Name, Phone Numbers and Company of this contact again appear at the upper left of the window, along with Category, Value, Tag and Prime. The Job Title, Business Type, Sources and Search Keys hold data you entered in the Data Record. Phew. You don’t have to do that again. Nor do we need to describe them again. By the way, that information can be entered or modified in the Marketing Profile window, too.

Notes

Did we forget something? If we did, this field amounts to a wild-card for anything else that you want to enter in the Marketing Profile for this contact.

Company Notes

Data entered here is about the Company. You knew that. What you may not know is that data entered in the Company Notes can be automatically entered into the Company Notes of all other contacts from the same company. When you enter information in Company Notes, a dialog box asks if you want the notes of all other entries for that company to match this entry. Yea or nay is up to you.

*Note:*Notes and Company Notes are different. Notes are attached permanently to the contact. Company Notes do not travel with the contact. They’re too corporate. If one of your contacts moves to a different company, enter the new company name in the Data Record. If the new contact’s company is already in the Contacts file for someone else, you can grab all that company data. When Clairvoyance recognizes the Company name that you’re entering, hold down the Opt/Alt and Shift key and press the Enter key. Keep holding the Opt/Alt and Shift keys for a moment until the address fills in.

If the Company name is already in place you can also grab the address information using the Company popup menu. Choose Lookup and Install from the Company popup menu to transfer the new company info.

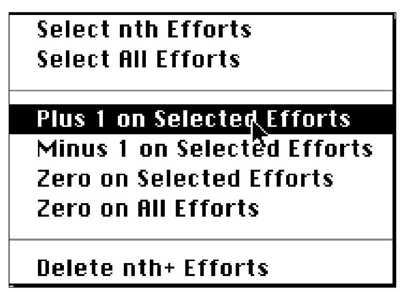
Neither Notes or Company Notes demands that you use them as we’ve described. You may distribute Company Notes to all records for that company or leave them in just one of the contact records for that company.

You can Search in Notes and Company Notes for anything in the field. Can’t get more versatile than that.

Sources

Sources, as we mentioned, contains the same Sources data you entered in the Data Record. Here, however, the Sources menu has one additional feature. At the top of the menu is Chart Sources. This generates a chart to show Sources for the three primary Categories in Contacts. You can view or print the chart You need to make Sources entries for your contacts, though, or no pretty charts.

Efforts



Efforts is a score card of sorts, for keeping track of how many times you’ve attempted to land someone’s business or win their heart. That means phone calls, mailings, personal sales calls or all of the above.

Click on any of the numbered radio buttons to set the number. You can’t be surprised by that, but… click on the Efforts menu and all sorts of actions regarding Efforts pop up. You can select those with the radio button set to a particular number or select all records with any Efforts logged. You can add an Effort, subtract an Effort or Zero out the Efforts for a Contact or, if you’re feeling especially magnanimous, you can set all Efforts to zip and none of your Contacts indicate any Efforts. Finally, you can Delete all those folks who’ve had four strikes, six strikes or whatever. By then, you’ve been a pretty lenient umpire anyway.

Date New

When you create a new entry in the Contacts file, Date New is automatically entered. You can change it, but it’s a handy marker showing when a record was entered. It is intriguing, sometimes, to see how long you’ve been associated with someone. Amazing how those years go by.

Updated

Updated is manually entered to indicate the last date you confirmed or revised any of the vital about this contact. Click on the button and “today’s date” is automatically entered for you.

Last Modified

When you make any change or entry to a contact’s record, Last Modified changes to today’s date, i.e.: the day you are modifying the record. Now you can see if a record was recently altered in any way. This date, and a time field, to which you have no access, is how InView compares and locates the most recently changed records when merging Contacts files.

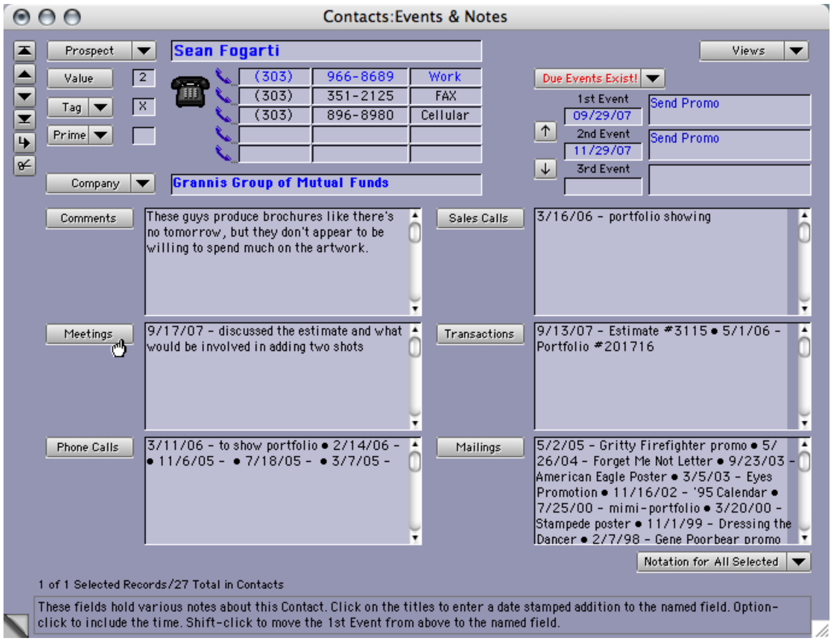
Events & Notes

Events & Notes is the place to jog your memory about upcoming events and to keep Comments and a history of Meetings, Phone Calls, Sales Calls, Transactions and Mailings. Enter data here directly, of course, but you don't have to do all the work. Some other files transfer information to this window, and some other windows in the Contacts file transfer information, too.

The contact's Name, Phone Numbers and Company from the Data Record window are here, along with Category, Value, Tag and Prime.

"Most often, your best source of referrals is your own clients. They should all get the same promotional materials any other potential client gets, plus this extra attention. At least six times a year, send them some kind of personal promo piece designed to "keep in touch." It could be a postcard from an out of town trip. It could be a personal letter. It could feature your photography and be more of a greeting card than a hard-sell piece. It should have some kind of hand-written note to let this person know you took the time and care to send this to them. They may also be on your computer or regular mailing list, but you recognize that they are something special to you. The more personal, the better!"

Excerpted from The Photographer's Guide to Marketing & Self-Promotion by Maria Piscopo by permission of Allworth Press. ©1995 Maria Piscopo



Events

There is the full featured Date Keeper in InView that gets down to time-of-day precision. Events, in the upper right corner, is intended for fuzzy scheduling. It's an additional way to remind yourself of a phone call to make, or a letter or promo to send for situations where precision is not necessary. For example, if a prospect tells you to call again in a few weeks, you can enter the earliest date that you want a reminder. If an extra day or even a few pass before you make that call, you're still okay. You can schedule letters to be sent a week or two after an interview, or schedule a series of promotional mailings during a period of time that looks free now. If you get a job during that time, the reminder continues until you do find that free time and do the darned thing.

There are the six cells for scheduling as many as three events for each contact. Enter the date in the left side where the arrows are. (More on those arrows in a minute.) Enter the memo in the cell to the right.

Ok. Arrows. The two arrows move all three entries up or down depending on which arrow you click. In the top position, the Up arrow is a check-off for things completed. Click that up arrow and the top Event date and it's memo are eliminated. The second and third Events move up one. The Down arrow moves event dates and their memos down a level eliminating the bottom one, if there is one. You can insert an event ahead of others already there. When you do that a dialog box asks if you want to wipe out entries being pushed out of the top or bottom slot. ➧ *Tip*

Tip: Use Cntl/RClk as you click to apply the action to all selected Contacts.

Tip: Don't forget about that dynamic help at the bottom of the window to remind you about all of the extra keyboard options in these buttons.

Note: Rather than sending your 1st Event into cyberspace, hold the Shift key and click any of the buttons for Comments, Meetings, Phone Calls, Sales Calls, Transactions or Mailings to transfer the 1st Event ahead of anything that's already in their adjacent cell. If the date entered for the 1st Event is not current, you are asked if you want today's date instead. The 1st Event is then cleared out of its position and any 2nd or 3rd Events move up. ➧ *Tip*

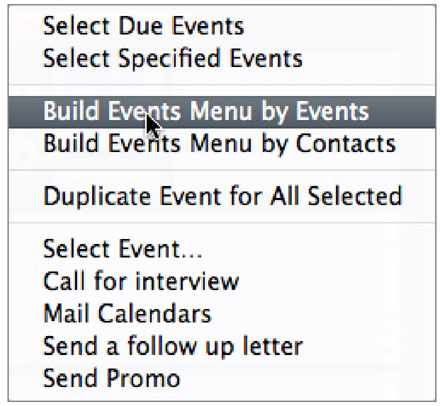
If the date of an Event needs to be adjusted by days, weeks, months or years, you got it! And automatically. Click in or Tab to the Event Date cell with the date you want to adjust. Now, as you close the cell, simultaneously press the Opt/ Alt key and the Tab key. A dialog box asks you how to adjust the date. Type a number, just the number, of days weeks or months, years, followed by a letter, d (for days), w (for weeks), m (for months) or y (for years) after the number. HindSight magic summons up the exact date in the future for this Event. So, if someone asks you to call again in two weeks, ignore the calendar. Simply press the Opt/Alt and Tab while in the Event date, enter 2w then press the Return/Enter key, and the correct date two weeks ahead is entered for you.

It is also possible to enter negative numbers to move a date backward.

When an event date arrives you're prompted of the event by a red asterisk on the Views popup menu in the record of contacts with a Due Event. The asterisk also appears beside Events & Notes in the Views menu to remind you where to go to find the source of this marker. Until the date is cleared, the asterisk remains. We call it the nag factor.

In addition, if there are Due Events in the file, the Events menu's title changes from No Due Events to Due Events!. When an Event due date arrives, the Event keeps coming up as a Due Event until you eliminate it.

There are a few ways to round up your Scheduled Events. You can use Select Due Events from the Search menu. or Select Specified Events and enter the starting and ending dates when queried. You get a list of the Events and an offer for a printout or you can review the results on-screen.



Events can also be selected using the Events popup menu. It offers several Events related options in addition to the two mentioned above.

Build Events Menu by Events compiles a list of all the Due Events and re-builds the menu. When you click on the menu again, it lists the Due Events by their memos. Choose an Event from this list and all contacts with that Due Event are selected. How easy to print labels, make calls or whatever the event dictates.

Build Events Menu by Contacts compiles a list of all contacts with a Due Event and re-builds the menu with this list. Choose a name from the menu and that contact record is instantly selected. It's up to you to figure out what to do with it at that point.

Note: This menu is also in the Data Record, but there it includes Events & Notes Window to bring you to this window.

Comments

Comments are the same here as in the Data Record window. Anything you enter in this window is also shown in the Data Record window. If you're one of those who skips about in manuals to find just what you need when you need it, look in this chapter for more about Comments under the Data Record heading.

Comments is for anything you want to record about this contact that doesn't go somewhere else. The Contacts file always recycles to show Comments in the bottom of the Data Record window when you first open the file.

Tip:

Hold the Shift key and click on any of these buttons to move the first event into the cell named on the button.

Use Shift plus Cntl/RClk to apply it to all selected Contacts

Meetings

Meetings is the place to make notes about person-to-person times with this contact. Yes, we have Sales Calls below, but it's not necessarily a sales pitch every time you see a contact,. Sometimes you've gotten together to discuss how a job is to be done or maybe a social encounter. Good notes here impress your contact with your great memory. Wow, that conversation took place two years ago.

Phone Calls

Here you can enter any phone notes. You can update the Phone Calls cell from the Task Timer. Transfer a memo made in there into this Phone Calls cell *(see the chapter on Task Timer file).*

Sales Calls

It's always nice to know when and how often you've hustled someone's business. Actually, it's good business to track Sales Calls. Every time you call on someone, make a note of it here along with something about how it went and what was discussed. You can see at a glance if it's been too long since your last pursuit and get a pretty good idea of where you gave it up.

Transactions

When you post an Estimate, Open Job or Invoice from Worksheet, or post any type of Submission or Invoice from Stocksheet, you can make an entry in Transactions to record each transaction with the contact. *(See Post Report in the chapters on Worksheet and Stocksheet.)*

Mailings

This field is for keeping track of correspondence, promo mailings, any missive you send. The Correspondence file can add notes here, too. *(see the chapter on the Correspondence file)*. The Notations menu, available in the label and envelope printing forms in Contacts can also add mailing memos to the Mailings cell. *(see the section on Forms in this chapter.)*

Note: All six of the large cells above have buttons for titles. When you click on any of the titles, InView inserts the current date in front of any existing entry and stands ready for you to add notes in the cell. The new entry is separated from previous entries by a bullet (sorry, not silver.) Hold the Opt/Alt key and click on the button to include the current time.

Hold the Shift key and click any of these buttons to insert the 1st Event ahead of anything that's already in the selected cell. If the date entered for the 1st Event is not current, you are asked if you want today's date entered instead. The 1st Event is then cleared out of its position and a 2nd or 3rd Events moves up.

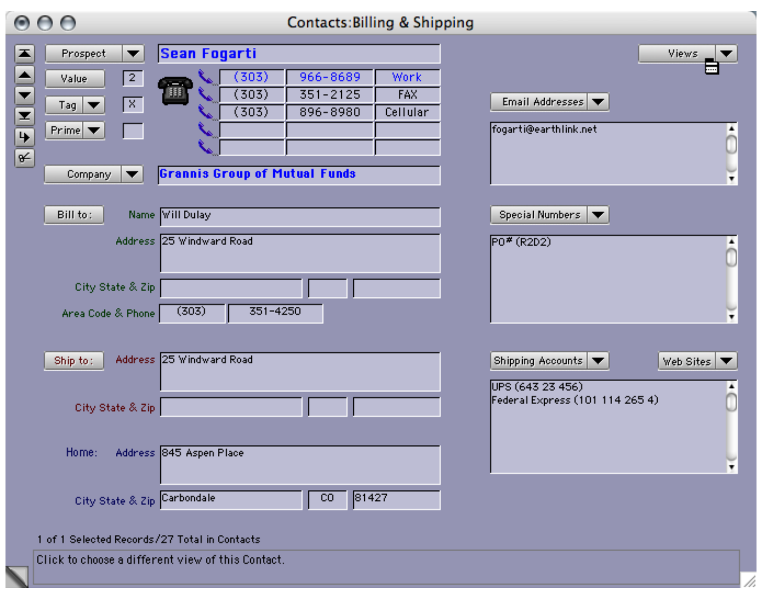
Notation for All Selected

Notation for All Selected is a popup menu listing the six fields above. When you choose a field name from the menu a dialog box opens where you enter a memo to add to the named field. The date stamped memo is inserted at the front of the field. Instead of adding it only to the contact record you're viewing, the current record, the memo is inserted in the field for all of the currently selected contacts. Save time. Quickly update entire sets of contacts at once.

Remember, the record count at the bottom of most Contacts windows shows you how many records are currently selected out of the total number in the file.

Billing & Shipping

This window is comparatively simple to look at, but saves valuable time when you're in a hurry to deliver a job or send a hot bill. It has the alternate addresses and special purpose numbers involved in billing or paying bills and shipping accounts for this contact. Billing & Shipping is another 3x5



card in the stack for this contact. It holds information used by Worksheet and Stocksheet for invoicing and by the Contacts file for shipping. The Name, Phone Numbers, Company, Category, Value, Tag and Prime are in this window, too.

Billing Address

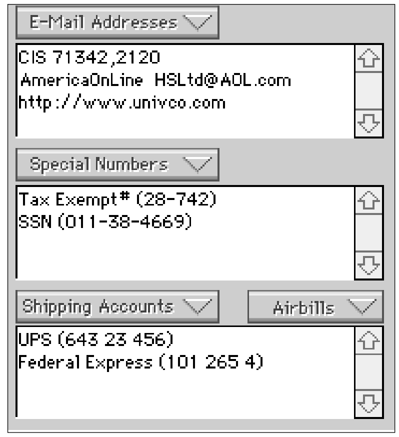
The first set of cells is for entering the name and address where your bill is to be sent. When you prepare an Invoice, Worksheet and Stocksheet pick up the information here if it is different from the contact's address entered in the Data Record.

Only the parts that are different need to be entered for the Billing Address, so don't waste your time duplicating any portions of the contact's that are the same as in the Data Record.

Shipping Address

If you regularly ship things to this contact at an address different from the address on Data Record, enter the portions of the address that differ here. If you ship to the contact's working address, the same as it appears in the Data Record, enter nothing in Shipping Address.

Email Addresses



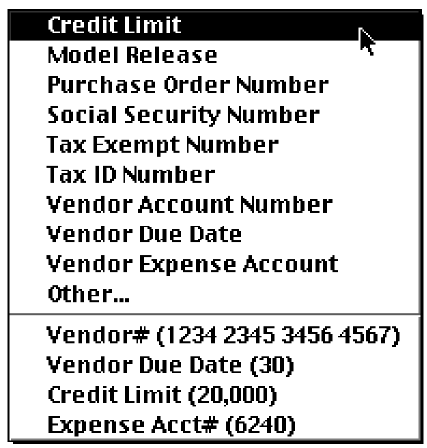
It's nice to have a contact's Email addresses handy and this is the place to keep them. It's more than handy though. When you create Email in the Correspondence file, here is the place InView looks for the contact's Email address. If there's more than one account listed, the first one is used.

The Email Addresses menu offers some help entering Email addresses and address order in the list. First on the menu is Rotate Address Order. This moves the last Email address in the list to the top. Every time you choose it, the process repeats. Toggle any address to the top of the list with no more than a few clicks.

Although you can type Email addresses right in the cell, using Enter New Address opens a dialog for your entry then takes care of separating multiple email address for you.

Email cc's to Clipboard, located at the bottom of the menu, assembles a list of email addresses for bulk email. Select all the people to whom you want to send the same email, then make this selection from the popup menu. The clipboard is then loaded with a list of their email addresses, separated by commas and ready for you to paste into the Cc: field of your email program.

Special Numbers



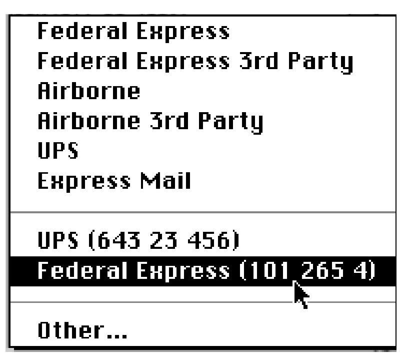
Most of your contacts won't have Special Numbers, but there are times when you need make certain specialized information accessible to other InView & StockView files. These include Sales Tax, Resale License numbers, Tax Exempt numbers, Social Security numbers and so on. Special Numbers is the place to enter those.

Several files look into this cell for anything marked for use in those files. For instance, Worksheet looks here for Tax Exempt and Purchase Order numbers when processing an invoice and Checkbook looks here for Social Security numbers when processing 1099's or Vendor Account #'s or default Chart of Accounts Code for Checks and Payables entry.*(See information on the uses of the various numbers in the chapters about the files that use them.)*

Whether entering new or modifying an existing number, use the menu to select it. The Special Numbers menu lets you select the type of number you're entering and makes sure that it is worded and formatted just right. Spelling, spacing and everything else is critical for other files to access the Special Number information. When they look for information, they're very picky. If the wording and form for the number is not right, they just pass on their way.

After choosing your Special Number, your computer's insertion point is flashing between an open and close parenthesis. Enter your number between the parenthesis.

Shipping Accounts



This cell is for listing courier accounts for this contact.

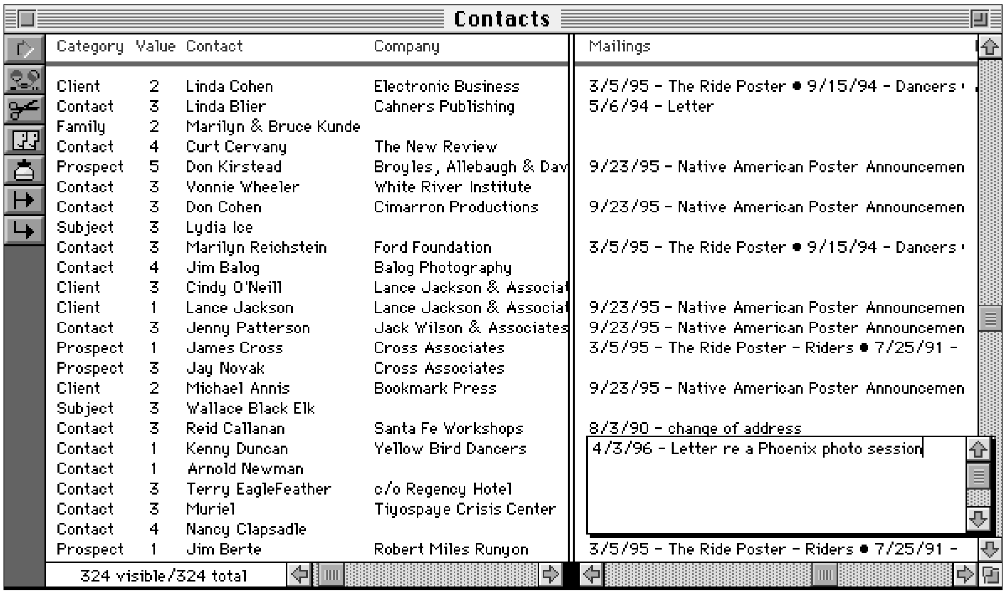
Be sure to use the Shipping Account menu to enter or change accounts. The menu allows you to select from the shipping companies listed and then enters parentheses, ready for you to fill in the numbers. Pick your company and start right in typing the account numbers. If an entry already exists for a particular company but you need to change or correct it, select the shipping company from the menu and its account number is highlighted, Any typing you do now replaces the highlighted numbers.

Web Sites

To the right of Shipping Accounts is a menu where you select any listed courier to have your browser connect to their web site.

Data Sheet

Data Sheet is the core of the Contacts file. Every other window provides a view of some of the information in the Data Sheet. To open Data Sheet, choose Data Sheet from the Views menu in any of the other Contacts windows or select Data Sheet from the Windows menu, or type Cmd/Ctrl-/ (back slash, it's on the question mark key)



Data Sheet is really handy to see many records at the same time.The Data Sheet displays every field of the Contacts file in rows and columns. Each horizontal row represents one contact's record. Each vertical column represents one field.

The Data Sheet can display one, some or all of your contacts' records depending on what records you Select at a given moment. Unselected Contacts are temporarily hidden from view, but are not gone, honest. The scroll bars on the side and bottom of the Data Sheet window let you scroll up and down through the records or to the left and right through the fields.

Tip: Click on the record counter and the Find/Select dialog box opens. Neat, huh?

The bottom of the Data Sheet window displays a record counter that shows how many of the records are presently selected, out of the total number of records in the database. ◀ *Tip*

Splitter Bar

Between the record counter and the left scrolling arrow at the bottom of the window is a small black rectangle. This is a screen splitter that makes it possible to see widely separated parts of the Data Sheet at the same time. For example, by using the screen splitter, you can be viewing the contact's Name in one side of the split window and the Company Notes in the other side. Each section of a split window scrolls independently, right and left, through the fields. Up and down scrolling moves both split sections of the window simultaneously.

To use the screen splitter, depress the mouse on it and drag it into the position you want. To restore the window to an unsplit view, drag the splitter bar back to its original position.

Although you can enter data in this window, you'll probably find it much more convenient to enter in other windows.

Cells in the Data Sheet are unique in that their sizes can be adjusted, and the adjustment can be made while opened or closed. These adjustments are covered in the Getting Started chapter, but it's worth repeating a few reminders here.

To adjust Field widths, click on the field title and drag left or right. The cursor changes to a horizontal, double-tipped arrow when you're on the right spot. Open cells are adjusted by moving the cursor to a fine point in the lower corner of the cell until the cursor arrow inverts. On left justified cells it's the lower right corner and on right justified cells it's the lower left corner. Click and drag left or right, up or down to get the cell to the size that suits you.

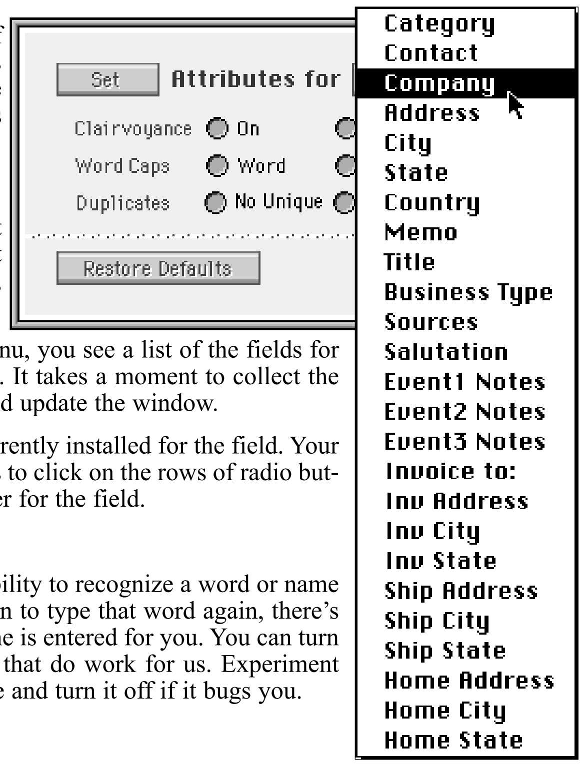
A closed cell is the "active" cell if it is highlighted. Unlike other windows of the Contacts file, in the Data Sheet you must double-click to open a cell. Cut, Copy and Paste work in an active cell whether it's open or closed.

Printing the Data Sheet window produces a list of the entries, row by row. Be aware that this prints every cell in every row and every column and can gobble up a lot of paper. Adjust the column width to suppress some data and expand others. *Tip* ➧

Power Users' Tip:
In the Data Sheet only, hold the Shift key and select About Contacts to toggle the menus from standard to expert. Expert menus expand the menu listings to include full Panorama Sort and Math menus. These menus can trash the file real quick in the hands of the inexperienced!

Field Attributes

Customize Contacts to suit your way of working by selecting Field Attributes from the Windows menu. This opens the dialog window where you select settings you want.



Select A Field

Before any attributes can be set, you must select the field you want to work on. Sort of like, "How can you have any pudding, if you don't kick your feet?"

When you click on the Select A Field menu, you see a list of the fields for which you can set attributes. Choose one. It takes a moment to collect the current settings for the field you chose and update the window.

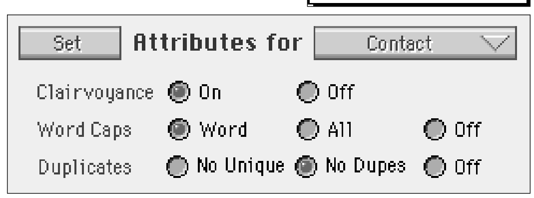
The window shows you the Attributes currently installed for the field. Your mission, should you choose to accept it, is to click on the rows of radio buttons to indicate the settings that you prefer for the field.

Clairvoyance

Clairvoyance is Panorama's marvelous ability to recognize a word or name that you typed in previously. As you begin to type that word again, there's an "Aha!" and the rest of the word or name is entered for you. You can turn it off, but we seldom do. We like things that do work for us. Experiment with this. You can always come back here and turn it off if it bugs you.

Word Caps

The choice of Word Caps determines whether or not every word in an entry automatically begins with a capital letter. This relieves you of having to move your pinkie to the Shift key so often. If Word Caps is set to Word in a field, the first letter of each new word is automatically capitalized. Ensuing letters are lower case unless you use the Shift key. *Tip* ➧



Tip:
To override Word capitalization in exceptional cases, type the first letter twice then delete the one that is capitalized. For example: a name, "De Soto," is made to read "de Soto" by typing "Dde Soto" and deleting the "D".

All

This makes every letter entered in the field uppercase. Once set to All caps, you cannot type a lowercase letter into the field. It's uppercase or nothing.

Off

This leaves the process of upper or lower case letters entirely up to you.

Duplicates

No Unique

Duplicates set to No Unique challenges anything new and different entered in the field. You can override this choice on the fly, but you're alerted that you've broken your own rule. No Unique works well in fields like Category where entries repeat over and over. It's not a good choice for the Contact field since all the contact names should be unique.

No Dupes

This sets the challenge if you enter anything twice. You can charge ahead and enter it anyway, but you get warned. No Dupes is the recommended setting for Contacts since duplicate names can cause problems. It's an undesirable setting for fields like Category or Business Type.

Off

You're on your own. No safeguards, no alerts, just anything that you want to enter in the selected field.

Set

You've made your choices, now a click on the Set button and InView takes a moment to get your selections installed.

Repeat the procedure for other fields you wish to modify and you're almost ready to enter data in the Contacts file.

Restore Defaults

If at some point, now or next year, you decide you really liked our settings, Restore Defaults will put all of the above Field Attributes back the way you found the software on your doorstep. Don't you wish that kids and pets were that easy?

Done

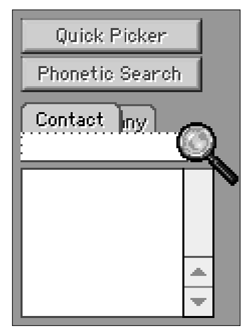
This is the window's exit. Walk, don't run, please.

Searching for Contacts

Okay, you've gotten half a zillion names entered into your Contacts file. That's got to be satisfying, but what good is all that typing if you can't find anybody again? Fortunately, in InView's Contacts you've got the best searching tools available.

For starters, there's Select a Contact and Select a Company in the Search menu. And, using the Find/Select in the Search menu, search any field or combination of fields for anything. We're going to skip these pearls for now, though. They're covered a bit later in the section on the Search menu. There's also a very important section in the Getting Started chapter on Finding Information. Do yourself a big favor and read them. Knowing how to use the Search menu profoundly influences on how much you get out of this software.

String Search



We believe the String Search, the bottom of the three unique searching tools with the magnifying glass, will be the one you use the most.

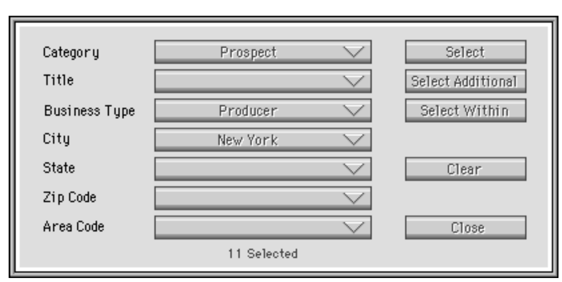
When you click on the magnifying glass icon, or in the cell with which it intersects, you've activated a search mechanism that scans the contact names for matches as you type in the letters.

As soon as you've entered two or more letters, the String Search window begins scanning the entire file for any name that has that string of letters in it. All matches are listed in the cell below. Keep typing and the list changes.

If the Contact Tab is in front, String Search builds a list of matching Contact names. Click the Tabs to bring the Company Tab in front before you start typing, and String Search builds a list of Company Names. Whichever tab is in the foreground determines which list String Search builds. Click on the tab to rotate back to front, or front to back. whichever you want.

To select a name shown in the list, double-click it and the Data Record displays that person's record while retaining the list. Double-click on another name listed to select it and on and on.

Hold the Cmd/Ctrl key and single-click on several names in the list. Each click successively highlights another name in the list as long as you click with the Cmd/Ctrl key down. Now, double-click on any one of the highlighted names and All the highlighted names are selected.



Delete the letters you entered, or click on the magnifying glass, or click the Tabs to clear the way for another search.

Quick Picker

When you click the Quick Picker button a window opens. Imagine that!

The Quick Picker searches a limited number of fields, but you can breeze through selections in those fields. At the left are the names of fields Quick Picker can search. To the right of the titles is a series of popup menus that are blank when the window opens. When you click on any of these menus, a list of the fields' entries appears.

Choose an item from any one of these menus to prepare the search to select any records with exactly that piece of data in that field. You can set the search to check one, a few or all the fields. The more you combine in a single search, the fewer matches you get. That's good when you want really tight criteria and a very precise hit. It's bad if you go too far and nothing matches. If you set the City for Chicago and the Zip Code for 01740 (Hey! That's not an Illinois zip code!), you get only is those records you mis-typed when they were entered.

If you search for Client, Art Director, Manufacturer, Cleveland, and Tennessee all at once, other than Magic Chef, you may not get many matches. Unless your criteria is pretty much cut and dried, it's best to use a series of searches to compile the set you want.

Select, Select Additional and Select Within allow you to expand and/or pare down selections and zero in on the set you really want.

Every time you make a selection, the count at the bottom of the window updates to show the number of records currently selected. When you first open the window the counter displays a number even though you haven't made any picks yet. This is because some number of records, at least one, is already selected.

The Quick Picker makes no changes to the content of the Contacts file. It simply changes which records are selected or unselected. Explore its possibilities without fear of hurting anything.

Select

The Select button separates every record that matches your settings from the rest and they become the only selected records in the file.

Select Additional

Select Additional hangs on to the currently selected records, whether they meet your new criteria or not, and adds any records that do match your criteria to the selected set. If you have New York and Miami already selected, you can use Select Additional to add Vancouver.

Select Within

Select Within checks through the currently selected records to eliminate any that don't meet new criteria. Records that were not already selected aren't even considered. If you have Prospects and Clients already selected, you can use Select Within for the Business Type, Publisher. Clients and Prospects who are not Publishers are eliminated from the selection (not from the Contacts file, so don't worry about them) and Publishers who are not Clients or Prospects are ignored.

Clear

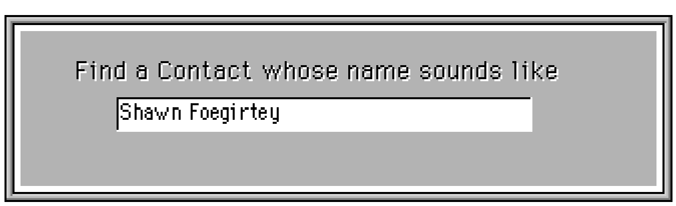
To clear all the menus of their settings, click on the Clear button. The current selection of records is unaffected.

To clear a single menu in the Quick Picker window, click on the menu and slide off the list without making a selection. In other words, pick nothing from the menu.

Close

Click on the Close button to close the window without affecting the current selection of records in the Contacts file.

Phonetic Search



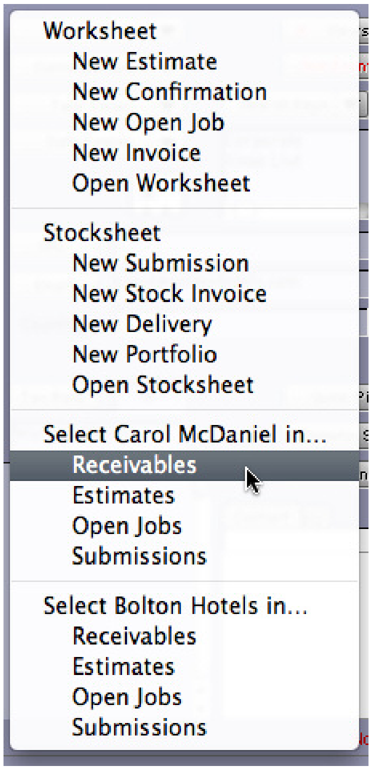
How often have you had a voice on the other end of the phone with a name you couldn't quite spell? And there are so many unusual spellings of a seemingly common name. Here's the cure. If you can get the first letters right, InView can find the name. The Phonetic Search works only on the Contact field.

Lawree Wizer locates Lorrie Weiser, Horris Robinson finds Horace Robynsen, Graham Smith finds Graeme Smythe, Marsha Stevens locates Marcia Stephens and Twoloose Laytrack can even find Toulouse Lautrec. Fillis Dylar does not find Phyllis Diller because those first letters have to be right. You're destined to play with this feature, we did.

Transfer Functions

Immediately to the right of the last Phone Numbers in the Contacts Data Record window are four buttons that initiate activity for this contact in other files. Beneath "Create a New Entry for this Contact in" are Transactions, Correspondence, Task Timer and Date Keeper. Each of these buttons opens another file and installs specific contact information in a new record or report. Each button has a near equivalent in the Transfer menu, but with fewer options for formatting the new entries in those files. Each of these files has a chapter dedicated to detailed descriptions of its use.

Transactions



Click and hold the mouse on the Transactions button. What appears in the popup menu depends on what HindSight files you have installed. You may see all or some of the following.

With InView installed the popup menu lists the kinds of reports you can build in Worksheet: Estimate, Confirmation, Open Job or Invoice. To create one of these reports, choose it or select Worksheet from the Transfer menu. In either case the Contact's name, address and phone number are transferred to the Worksheet. If you use the Transfer menu, versus this popup menu, the new report is an Estimate but you can readily change that within Worksheet.

The bottom section of the Transactions menu allows for quickly locating transactions for the Contact or Company by choosing any item listed below "Select So and So in…" Receivables, Estimates, or Open Jobs.

With StockView installed, Stocksheet and its reports are listed: Submission, Stock Invoice, Delivery or Portfolio. Choose one of these or select Stocksheet from the Transfer menu and the Contact's name, address and phone number are installed on a new report in Stocksheet. If you use the Transfer menu, the new report is a Submission, but you can change it easily within Stocksheet.

The "Select So and So in…" section of this menu lists Submissions to quickly locate any submissions in the Submission file for the active contact.

Correspondence

The Correspondence popup menu lists Letter, Fax or Email. All of these open the Correspondence file with a new communique and the contact's name, address and salutation are installed and ready to go. Type the contents of your correspondence and print. Now that's mail merge! ➧ *Tip*

Tip: If the Contact has more than one e-mail address, each one is listed in the menu as a choice.

Use the "Select in Correspondence for Contact" to select all past letters, faxes, or email currently in the Correspondence file written to the active contact.

Task Timer

Clicking on the Task Timer button transfers the contact's name, company and phone numbers to a new record in the Task Timer file for documenting and timing any task for this contact. All of you who charge by the hour, stand up and smile.

Use the "Select in Task Timer for Contact" to select all past phone calls or tasks currently in the Task Timer file for the active contact.

Date Keeper

When you and your contact set an appointment to show your stuff or discuss a job or just have lunch, use the Date Keeper button in the Data Record window to open the Date Keeper file and add an entry. Your contact's name is transferred to the Date Keeper for you to add the specifics.

Use the "Select in Date Keeper for Contact" to select all past or scheduled events currently in the Date Keeper file for the active contact.

Menus

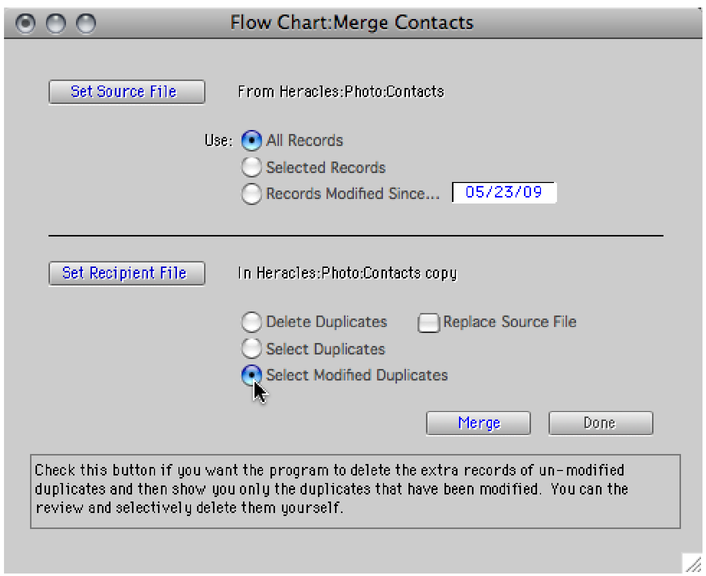
As we mentioned earlier the File and Edit menus are, for the most part, standard menus. Their functions are covered thoroughly in the Getting Started section. The exception in the Contacts File menu is Merge Contacts.

File Menu

Merge Contacts Files

Merge Contacts allows different copies of the same Contacts database to be used separately and then re-united. You can input new names into a Contacts file on one computer and later add them to the Contacts file on another computer.

If you take a copy of Contacts on a business trip and modify it, or for some personal reason you created two folders of HindSight software and want to combine the information in both in a single Contacts file, you need Merge Contacts.



Unlike other InView files' merging, Contacts has a number of merging controls and options. In order to accommodate these options, the merging is actually built into and performed from the Flow Chart. When you select Merge Contacts, the Flow Chart opens and shifts to a window titled Merge Contacts. You can Open the Flow Chart if you prefer and select Contacts Merge Setup from Flow Chart's Windows menu. *Warning!* ➧

Warning!

Nothing is perfect. Even if you make no mistakes, things can go wrong. Hardware fails, software develops errors due to conflicts, power goes out at critical moments. Protect yourself with backup copies of your files before undertaking critical data transfers.

Merge Contacts Setup

In the Merge Contacts window, you have decisions to make. The most important is identifying the files that are to be merged: the Source and the Recipient. The Source File is the file you are transferring from and the Recipient is the file you are transferring to. Typically, the Recipient is the Contacts file where you start all this. The Source file and the Recipient file have options that determine how and what happens during the merging process.

The Source File

The Source file must be a current version Contacts file. It can be on another disk or computer, connected by network or modem, or it can be in another folder on your hard disk.

The Source file can be in the same folder with the Recipient file, but the names of the Source file and the Recipient file must be different in some way because identically named files can't coexist in the same folder. Rename the Source file Contacts copy or New Contacts or `Contacts, anything to differentiate them. If you try to drag a file named Contacts into the folder where a Recipient file named Contacts is stored, your computer's gonna try to replace the Recipient file with the Source file. That's not what you want at all.

To Make a Copy of Contacts

Lacking a network connection or as a simple matter of personal preference, if the Source file is on another computer you need to get a copy of the source Contacts file onto the computer destined to perform the merge.

At the Desktop level of the computer holding the Source file, make a duplicate of the Contacts file. To do this, open the folder containing the source Contacts file. Click once to highlight it. On Macintosh, use the Duplicate command in the File menu of the Finder. A new file named "Contacts copy" appears in the folder. On Windows, use the Copy command in the Edit menu followed by the Paste command. A new file named "Copy of Contacts" appears in the folder.

The "copy" can now be transferred via email, network or SneakerNet to the computer that has the Recipient Contacts file in the folder containing Flow Chart and the Recipient Contacts file. (We're assuming you know your computer's basics of dragging files to and from floppy disks). Actually, the Source file, Contacts copy or Copy of Contacts, can be just about anywhere on your hard disk, but is probably most convenient to keep Recipient and Source close together.

The Recipient File

The Recipient file also must be a current version, InView III, Contacts file. This is the destination file for records from the Source file. As records are about to be added to the Recipient file, the two files are compared. Settings in the Merge Contacts window determine how the records are treated.

Note: To obtain maximum speed merging Contacts files located on different computers connected via network or modem, place both Recipient and Source files on the computer you're using.

Set Source File

You may start a merge by identifying either file, but for ease of explanation, let's start by identifying the Source.

To establish the file records are coming from, click on the Set Source File button. An Open File dialog box opens. Locate and select the Source file, the one with "copy" as part of the file name... presuming you duplicated it in the Finder and transferred the copy to the folder with your Recipient file. Now, click on the Open button or double-click on the file name. That file name is installed as the Source file.

Set Recipient File

Click on the Set Recipient File button to repeat this procedure to identify the Recipient file. If either the Source or Recipient are not identified, no merge will take place. *Tip*

Tip: Once set, the names of the files you selected are remembered from one merge session to the next. If you use exactly the same name for the Source file, say Contacts copy, for each merge, you only have to identify the files in the Merge Contacts dialog box the first time you do a merge.

Set Recipient File

Several controls let you to decide which records from the Source file are merged with the Recipient file and how they are treated in the Recipient file. In the top of the window, you must indicate what records you want used from the Source file. Records from the Source file are added to the Recipient file according to the Source File Settings you make in this dialog box.

All Records

If you indicate All Records, every single record in the Source file is compared to every single record in the Recipient file. This could be a very lengthy merge operation depending on the size of the files you are merging and the speed of your computer. It's also likely to be unnecessary if these two files are merged frequently or hardly spend any time apart.

Selected Records

To merge only certain records from the Source to the Recipient file, do a Find/Select for only those records you want transferred from Contacts copy. Save when the search is completed, then indicate Selected Records in the Merge Contacts dialog box. This option lets you decide, using your own criteria, which records to transfer. For network or modem merges this is usually the speediest way.

Records Modified Since...

Use this to transfer records entered or modified on or since a specific date. Click Records Modified Since… and enter a date. Records modified prior to that date are presumed unchanged and remain untouched in the Recipient file.

Note: When you make new entries into Contacts, the mere act of entering the data marks a record Modified the day it is entered, therefore, new records are also transferred when you choose Records Modified Since... .

Recipient File Settings

The Recipient file is the final resting place for records transferred from the Source file. You need to tell the electrons inside your computer what to do.

A momentary look at the technique of merging records may help you grasp the concept behind some of these options. Records for the same contact that exist in both files are temporarily duplicated in the Recipient file. These duplicates are handled according to the Recipient file settings.

Delete Duplicates

If you choose Delete Duplicates, then the older of duplicate records is purged. The most recently modified record in a set of duplicates is retained. In other words, the most recently modified of the two records for the same contact is the one kept.

Replace Source File

Replace Source File applies only if you also select Delete Duplicates. After the duplicates have been run out of town, InView saves the new version of your Contacts file in place of both the Source and Recipient files. Thus both are freshly updated matching copies of the Contacts file. When you choose this option, the replacement is not made until you give a final OK click in a dialog box that appears after the rest of the merge is complete.

Select Duplicates

If you choose Select Duplicates, records duplicated in the merging process are selected and displayed, whether they have changes or not. Many of them may be exact duplicates. It's your job, then, to go through the records and decide which of the duplicates to delete and which to retain. Have fun!

Select Modified Duplicates

Select Modified Duplicates tells the program to select and display only duplicated records that have differing dates and/or times of modification. At least one of them has been changed. Unmodified duplicates are deleted. This lets you go through only modified records and decide which records to purge and which to keep.

Conservative Settings

The safest combination of settings is to set the Source file for Records Modified Since... a date, and set the Recipient file for Select Modified Duplicates. This lets you monitor the merge. You have more control over which record prevails and which bites the dust. *Tip* ➧

Tip:
After you use Conservative Settings and finish making decisions, hold the Opt/Alt key and click on the Set Source File button to have InView replace the Source file with your handiwork.

Cavalier Settings

To do the most automated merge, set Records Modified Since...a date, and set the Recipient file to Delete Duplicates and Replace Source file. If we were less generous in our programming, this would be our only method. We use it.

Merge

When everything is set, click on the Merge button and let'er rip. The two files are merged, compared, duplicate entries located and handled according to your choices and then the files are combined into the Recipient Contacts file. If you checked Replace Source File, a dialog asks to make sure you really mean it before finishing the job.

When the Merge is completed a dialog window let's you know. *Warning!* ➧

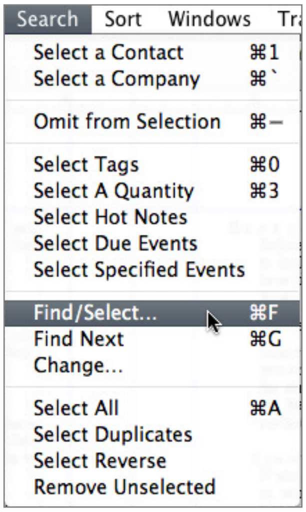
Warning!
If the Mission Completed window doesn't appear, the Merge was not properly completed. Something went awry. ALWAYS protect yourself with current back ups and give your merged Contacts file a quick visual inspection to be sure things are okay.

If you regularly use more than one computer and you didn't use the Replace Source File option, may we suggest that you now transfer a copy of your fine, updated Contacts file to the disk or computer that has the original Source file? You did all this to have matching files, at least for a little while.

When you close the window or click on the Done button to exit the Merge Contacts window, InView offers to change the date you chose in the Records Modified Since... dialog to today's date. This works as a reminder of the date you last merged and prepares for the next time you use it. By remembering your file settings and dates, you're always ready to Merge Contacts files without redoing the settings.

Search

Before you get rolling in the world of Searches, take a moment to look at the Search menu illustration. There are Cmd/Ctrl keys listed by many of the selecting choices. These speed up things and quickly become second nature.



Select a Contact

Select a Contact, Cmd/Ctrl-1, opens a search dialog box where you enter the name of the contact you are seeking. You reach the same point by using Find/Select, Cmd/Ctrl-F, and indicating that you want to search the Contact field. Clairvoyance

If you didn't turn it off in Field Attributes, Clairvoyance kicks in, using the Find/Select dialog, as soon as you type enough of a name to recognize a name already in Contacts.

Clairvoyance works only if you type the first name and use the appropriate upper and lower case letters. Z could get you Zach Archer when you really wanted Joe Zent. The Contains search option may select more than one name. If you search for a name that contains John, the records selected could range from John to Johnson to Upjohn.

Select a Company

Select a Company works exactly the same as Select a Contact. It just looks for companies, instead of people.

Omit from Selection

Omit from Selection unselects the currently active record. The record is not deleted, but simply send to the background, shortening your list of selected records by one.

Select Tags

Select Tags selects all records in the file that are tagged.

Select A Quantity

This selection allows you to designate a number, then reduces the number of currently selected Contacts to that number.

This is useful, for instance, if you can only send 250 email messages per day but your targeted group is 600 names. Use this to select 250. The next day, select the targeted group, then use Find/Select to SelectWithin - Mailings - Not Contains and enter a key phrase of the previous day's Mailings Memo, or the date, to get those within the target group who have not yet received the email. Select another 250. On the third day you have just 100 remaining Contacts to get the email.

Select Hot Notes

Select Hot Notes locates all contact records with a Hot Note attached. No matter which window you're in when you activate this selection, you switch to the Data Record. All records with Hot Notes are there. Review them using the arrows in the Tool Palette.

Select Due Events

Select Due Events searches the list of dates in Events to find entries for today or an earlier date. A date earlier than today, something you either haven't done or forgot to remove from the window, continues to appear when you use this selection. Remember to cancel completed Events using the Up or Down arrow in the Notes & Events window.

When Select Due Events completes its search, a dialog box asks if you want a printed report. If you decline the printout, the selected records and events are in the Contacts Data Record window. Go over them individually there or collectively in the Data Sheet window. The printed report is a list of the contacts with Due Events, their address and phone number and the date and note regarding the Event.

Select Specified Events

Select Specified Events selects only Events with a specific starting and ending date. A dialog opens asking for the starting date, then another dialog asks for the ending date. Enter these dates using the mm/dd/yy format. Events that fall within that date range are selected. *Tip*

Any of the formats in our Tip can be used in any combination for the same search, so indicating the starting point in one way doesn't require entering the ending date in the same format.

Tip:

Use keyboard shortcuts to enter the dates: T means today. Adding positive or negative numbers to the T indicates the number of days before or after today. Try entering T-10 (the letter t followed by a minus sign and the number ten) for a starting date and T5 as the ending date, this selects Events scheduled from ten days prior to today through five days after today. To select a single day, enter the same date for both the starting and ending dates. If your calendar isn't handy and you don't feel like hunting for it, type "last Friday", "yesterday", "tomorrow" and "next Tue" to find Due Events on those days. You can even use a three letter abbreviation for days of the week. It's three letters regardless of what the standard abbreviation for that day might be. Yes, Thu for Thursday. You can enter 6/15 or 12/1 and the year is added automatically. Keep in mind, though, that the nearest year, six months ahead or behind, is the year automatically entered.

In order to accommodate these liberal date searches, slashes between day/month/year are not automatically entered when you use our Tip options. As a result, to use the mm/dd/yy format you type in the slashes.

You can conduct your own search for Events. If you want to look ahead and see what's scheduled for a particular date, Select All, then sort the columns of Event dates in the Data Sheet window. You can scroll through the list or use Find/Select to locate a particular date or range of dates and all the other Events are shown in chronological order.

Find/Select...

Find/Select... opens the standard Panorama select dialog. The search parameters lets you search in any data field for any data. Click on the double arrows below the Find button to expand the dialog.

We don't mean to insult your intelligence, but understanding the difference in the search options And and Or as well as knowing the difference between Find, Select, Select Additional and Select Within and how to use these tools makes a big difference in how effectively you Search and Select data. Each produces a distinctly different result.

Be sure to look at the Getting Started chapter to learn the full potential of Searches.

Find Next

Find Next resumes hunting for matches after a Find is located. Remember, Search only scouts among the records you have Selected at the moment. If the first Find isn't the one you want, the search picks up at that point and resumes looking among the selected records, still using the same criteria, until it finds another match. Use Find Next to repeatedly locate other occurrences until no further matches are found. At that point you hear a beep. There are no more.

Change...

Change... opens a dialog where you enter data as it exists in a field plus what you want that data changed to. The change affects only records selected at the moment, and, in those, only the field highlighted when you activate Change.

Select All

Select All selects every contact in your database. If you choose Select All in a single record window, you still see only one record at a time. Just in case you're not sure glance down at the record counter in the lower left hand corner of the window to confirm that all are selected. In the Data Sheet or List windows, you can see the full set of records in your file.

Select Duplicates

Select Duplicates selects and displays all contacts listed more than once in the file. You can then "cherry pick" to decide which ones should be deleted. *Tip* ➧

Tip: Hold Cntl/RClk as you choose Select Duplicatesfrom the menu to have any duplicated Contacts automaticaly deleted by the process.

Hold the Opt/Alt key to choose duplicates by Company name instead. There is no auto delete for Company since there may legitmately be several records with the same Company.

Select Reverse

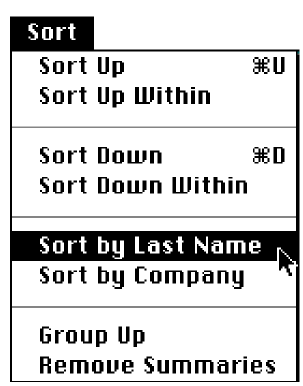
Select Reverse de-selects all the currently selected records and selects all the records that weren't unselected. Sometimes it's easier to pinpoint and select records you don't want rather than ones that you do want. If you just used Select All, there's nothing to reverse to. You end up with all records.

Remove Unselected

Remove Unselected deletes, yes, we said *deletes*, all unselected records in the database! Before doing this, Save. If you change your mind after deleting these unselected records, you can Revert to Saved in the File Menu and retrieve all the deleted records. The only other salvation is to close the file and click No, you DON'T you want to save changes before closing.

Sort

The Sort menu works nicely in more than one place, but it's especially useful in the Data Sheet. You can look at all the selected records in alphabetical, numerical or chronological order depending on the field you Sort.



Sort Up

Sort Up sorts the active field in an ascending order. Choose the records you want to look through using the Select menu, then choose Sort Up from the Sort menu.

Sort Up Within

Sort Up Within does an additional sort using a different field without disrupting any preceding sorts. If you Sort by State, then click in the

City field and choose Sort Within, the state names remain in alphabetical order, but within each state, the cities are alphabetized. Now Sort Within on the Zip codes and you have the zip codes in order for each cities.

Sort Down & Sort Down Within

Sort Down and Sort Down Within work in the same as Sort Up Within except that the order is reversed to descend.

Sort by Last Name

Sort by Last Name sorts contacts by last names. Company name will be used if there is no Contact listed. If only some records are selected when Sort by Last Name is activated, InView asks if want just these or all records sorted.

Most variations of last names can be sorted, including “Del Rio”, “Smith, Jr.”, “Bache-Wilder” and the like, without being confused by middle names and initials. It’s not infallible though. In our tests a three part last name like “Van Der Goot” got sorted with the D’s. When the best guess at a last name just doesn’t make the grade, add a touch of guidance. To place a marker in the name, type two spaces, instead of one, in front of the first letter of the last name. The spaces act as a flag indicating where the last name begins. Our example above, Van Der Goot, is forced properly into the V’s with very little effect on the look of the name when you print it.

> *Warning!*
>
> Grouping a field where every entry is different, Name, for instance, is probably not useful since every record then becomes a group.

Sort by Company

Sort by Company sorts contacts by their company name. Contacts without a company are at the top of the list. This sort even makes sure that companies whose names begin with “The” are sorted properly.

Group Up

Group Up sorts the active column and creates a special Summary Record at the end of every set of grouped records. The most common fields to group include Source, Company and City. The selected records are in alphabetical order and every set of records becomes a group. For example, each Company is a group with a Summary Record inserted at the end of the group. ♦ *Warning!*

> *Warning!*
>
> A normal data record can accidentally be converted to a Summary Record if you click to the far left of the record in the Data Sheet. You can tell you’ve done this if a small + sign appears at the left of the record and the entire row of data is bold. To undo this mistake, click again to the far left of the record and it is restored to its Data Record condition. It’s also possible to convert a Summary Record to a normal record. To reestablish it as a bold Summary Record, click to the far left of it.

Remove Summaries

Remove Summaries deletes the Summary Records created by using Group Up. Removing the summaries has no affect on your data records. ♦ *Warning!*

Group Up and Remove Summaries are most effective in the hands of advanced user. If you’re unsure about what they do, feel free to experiment and learn, keeping in mind that Revert to Saved is the ultimate undo, but it only works if you Save before experimenting and do not Save during the experiment. If you want to experiment, make a backup copy for experimenting.

Notation

The Notation Menu is available only in the label and envelope printing windows. With it you can add a date stamped memo to the Mailings field of a contact record (just like clicking on the Mailings button in Events & Notes) or to all the selected records (just like choosing Mailings in the Notation for All Selected menu in Events & Notes). When you choose Notation, a dialog box opens. Type in the notation to add to the Mailings cell.

Windows

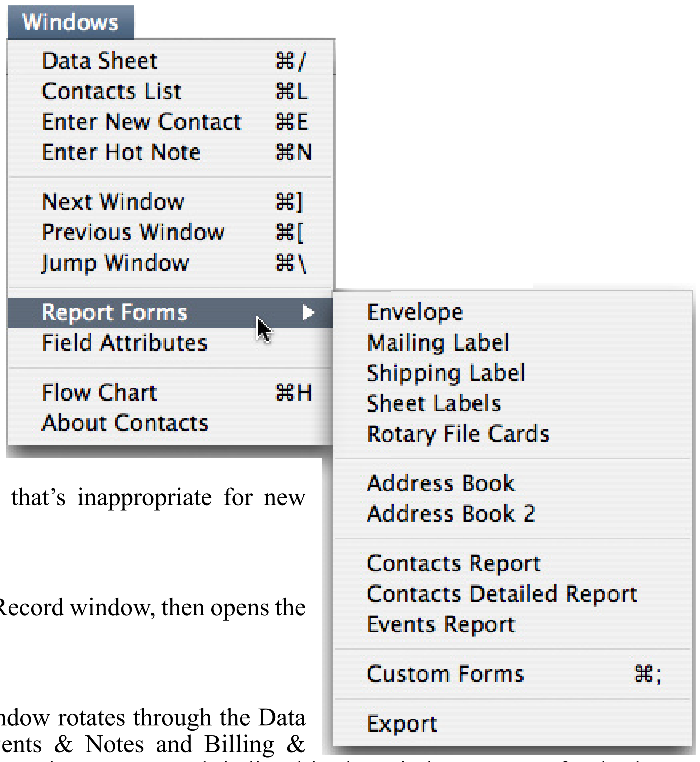
Data Sheet
Data Record

Data Sheet opens the Contacts Data Sheet. When the Data Sheet is open, this menu item toggles to read Data Record. Where you go when you choose this depends on where you start. It toggles, remember. If you’re viewing a single record window, you toggle to the Data Sheet. If you’re viewing the Data Sheet or the Contacts List, you toggle to the Data Record. ♦ *Tip*

> *Tip:*
>
> To view either the Data Record, Marketing Profile, Events & Notes or Billing & Shipping at the same time as another window of this set, open any one of the windows, hold the Option key and select the additional window from the Views popup menu.

Contacts List

The Contacts List is the only window, other than the Data Sheet, that shows you more than one contact at a time. To open the Contacts List window select Contacts List from the Windows menu or type Cmd/Ctrl-L. Unlike the Data Sheet, the Contacts List only shows some of the fields: Contact, Company, City, State, Area Codes and the Phone numbers from the Data Record. Click on the title of any of the fields to sort the field.



The left side of the window is lined with a check box for each contact. These boxes are the same Tag boxes that appear in all windows of Contacts (except the Data Sheet). You can Tag records in this, as well as the other windows *(see Tags in this chapter)*. The active record is the one that is highlighted!

Enter New Contact

Enter New Contact adds a new, blank record to the file and opens the Name cell ready for you to start typing. You can use Cmd/Ctrl-E to start a new record. If you're in a window that's inappropriate for new entries the Data Record opens.

Enter Hot Note

Enter Hot Note opens the Data Record window, then opens the Hot Note memo cell.

Next and Previous

Next Window and Previous window rotates through the Data Record, Marketing Profile, Events & Notes and Billing & Shipping windows, in that order or in reverse. Each is listed in the Windows menu of only those four views.

Jump Window

Jump Window is the same as activating either Next or Previous twice. With four views available this function takes you quickly from any one of them to two views away.

Report Forms

Report Forms opens a sub-menu listing all the printing forms in Contacts and gives access to the forms for reports and editing graphics. For Contacts reports, envelopes, rotary file cards and labels, it is also your access for printing. *(There's more information about these forms, including the Custom Forms, and their features in the section on Reports Forms later in this chapter.)*

Field Attributes

Field Attributes opens the window where you customize your copy of Contacts. *(See the section titled Field Attributes earlier in this chapter.)*

Graphics Mode

Graphics Mode is only available in the windows used for printing labels, reports and forms. When you open Graphics Mode, using either the menu or Cmd/Ctrl-Y, the tool palette changes to include new tools. The menus change, also, to graphics editing mode where you manipulate the appearance and printed output of forms. *(See the chapter on Printing and Editing Reports for more information on editing report printouts.)*

Flow Chart

Flow Chart opens the Flow Chart and lets you swiftly navigate among all the HindSight files you bought. Remember "H" for Home; Cmd/Ctrl-H takes you home.

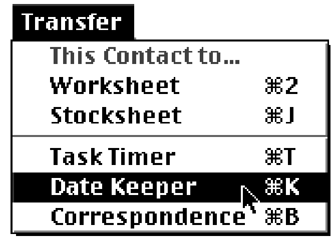
About Contacts

About Contacts reminds you that when it's created, it's copyrighted and tells what version of Contacts you have.

Note: In the Data Sheet only, hold the Shift key and select About Contacts to toggle the menus from standard to expert. Expert menus expand the menus available to include the full Panorama Sort and Math menus. Use them with caution!

Transfer

This menu moves contact information to the file you select. Each listing has an equivalent button on the Contacts Data Record.



Worksheet

This opens the Worksheet file and puts the name of the contact in the header of a new report. Worksheet opens by default as an Estimate. To select a different kind of report, click the mouse on the report's Status. If you use the Transactions menu button in the Contacts Data Record to perform the same task, the button lets you pre-select the kind of report to create.

Task Timer

Task Timer opens the Task Timer file and installs the name and the first phone number of the contact, the active record. The entry is dated and ready to place a call and/or start racking up the time.

Date Keeper

Date Keeper opens and places the name of the active contact in a new entry then stops for you to enter details of the entry.

Correspondence

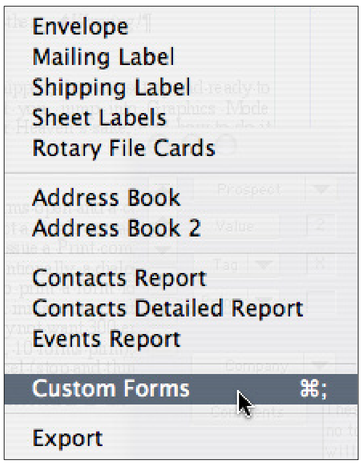
Correspondence opens and transfers the name of the active contact in the Correspondence file. Through the Contacts file, you can select a set of contacts to receive the same letter, fax or Email.

The chapters on these files give you more details about each of them. ♦ *Warning!*

> *Warning!*
> All these files must be in the same folder as the Contacts file in order to exchange information from one to another.

Report Forms

Although you can customize all the forms in the Contacts, as shipped, they are set up and ready to use with no adaptations, if they suit you. If they don't suit you, jump into Graphics Mode (Cmd/Ctrl-Y) and prove your prowess. Make 'em right. But for Heaven's sake, read how to do it first! *(See Printing and Editing Reports.)*



To Print a Form

Select Print from the File menu while you have any of these forms open and a contact selected. In most printing situations, say an envelope or an airbill, you Select a single contact record using the Search/Select function, so there's no problem. It is possible to issue a Print command when many Contacts records are Selected. If you do that, accidentally or intentionally, a dialog asks if you want the active one printed (the one you are looking at) or intend to print a form for all the Selected Contacts. Obviously, if you have 300 contacts selected and you initiate the printing of labels, you probably want all 300, but if you're in an envelope form you may not want 300 envelopes. The dialog gives you three choices: Selected (if 10 contacts are selected, 10 forms print), Active Only (one form is printed for the contact whose record is active), and Cancel (stop and think about it).

Another way to print just one form when several Contacts are Selected is to use Print This Record in the toolbar at the left of the report window.

Note: Paper stocks and printers change constantly. In many cases these forms have comments added in their windows to advise you of any updated information.

Envelope

This prints business size (#10) envelopes, one or a thousand.

Note: It's pre-set for a printer that feeds #10 envelopes sideways. It's probably necessary to change the Page Setup, in the File menu, to Landscape the first time you use this Envelope form.

Mailing Label

The Mailing Label is pre-set to print a single cut label. We can't know what size your labels are, so, it's likely that some fine tuning of the address placement is necessary. As with any other form adjustment, that's done in the Graphics Mode.

Shipping Label

The Contacts Shipping Label is pre-set to print a single cut label similar to the Mailing Label. It uses the Contact's Ship To Address if one exists. If a Ship To Address is not present, Shipping Label will use the the mailing address instead.

Sheet Labels

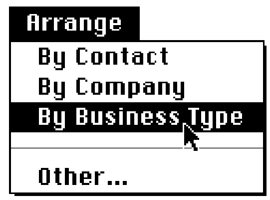
Sheet labels is set for sheet-fed printing with a laser or inkjet printer using 8.5x11 inch label stock such as Avery 5160/5260.

Rotary File Cards

Rotary file cards come in a wide variety of stock and have changed frequently. *(See the comments in the window for the paper stock this form is pre-set for.)*

Address Book

The Address Book prints a pocket notebook size directory of contacts, alphabetized by Last Name, by Company Name, Business Type or by your choice of any other data field in the Contacts file. It prints only the contacts you have Selected when you choose to print an Address Book.



The Address Book is preset to print on an 8.5x11 inch page but is scaled suitably for organizers such as the Day Runner. We use Avery 41-256 pages, the same stock used in the Date Book of the Date Keeper file.

When you open the Address Book report form it has a menu titled Arrange which controls the order of the Address Book. The first three choices are obvious. Choose By Contact to organize the book by your contacts' last names, By Company for company names and By Business Type for a yellow pages kind of alphabetized business organization. Other… allows you to specify any other field you may want to use, but to work properly, that requires a little help from you.

When you choose Other…, InView checks to see what field is active in the Data Sheet, then asks you to affirm that's the field you meant to use. If it's not the one you want, the Data Sheet reappears and a dialog suggests you try again. Click on the field that you do want to sort by, re-open the Address Book form and try again. Of course, if you clicked on the right field the first time, you're probably already printing.

Contents of an Address Book

Make your choice of records for the Address Book using one of the Select options. Next a dialog box asks if that's what you really mean or if you'd rather go ahead and include all your records. Either way, the records are automatically sorted and grouped. It takes just a moment. When that's finished, the Print dialog appears. Time to print your pages.

You can alternate the pages during printing with a sheet fed printer. When the print run is halfway through, a dialog tells you to flip and re-insert the pages. Make sure that the first page in for the second pass is the same one that was first through on the first pass. It takes a little experimentation to get it right. Try selecting just a handful of contacts for a test run. First to print are odd numbered pages, then even. There it is, a very nicely organized book with printing on both sides. Slick, huh?

Note: Background printing must be turned off to print the alternating pages.

After Printing an Address Book

When printing is completed or canceled, there's one more step. We mentioned that your data is Sorted and Grouped. Grouping creates extra, temporary Summary records at the end of each group. They serve as the headings for each group, separating the A's from the B's from the C's and so on. At some point, these Summary Records need to be removed in order to resume normal use of the Contacts file.

A dialog box offers to do that task as soon as printing is completed or canceled. You may decline for a quick peek at Print Preview or to make Graphics adjustments or whatever else you have in mind. If you do decline, the Summary Records are automatically removed when you close the Address Book form window by clicking on the Close Box in the upper left hand corner. We do try to look after you, you know.

When you make a new selection from the Arrange menu, InView automatically removes any Summaries already there and creates the appropriate new Summaries.

Note: There is a slim chance that you could leave the Summaries in place when you close this window. If Summaries appear next time you open this window, get them gone using Remove Summaries in the Sort menu.

Contacts Report

The Contacts Report is a straightforward listing of contacts' address information and your comments. Revise the report form and print any contact information you want. As shipped, it is set to print the Name, Company, Address, the first three Phone Numbers and Comments from the Data Record.

Contacts Detailed Report

The Contacts Detailed Report is the all inclusive report in Contacts. It has all of a contacts data in one report and requires a full sheet of paper for each person.

Events Report

Events Report opens the template for printing Due Events entered in the Events & Notes window. Typically you Print this report using Select Due Events or Select Specific Events in the Search menu of the Events & Notes window. When you make one of these selections, a dialog appears asking if you want a printed report. This is the report template that's used for that report. We put it here to give you another way to access and revise the graphics.

Export

Export opens a small window set to save a text file, also known as an ASCII file, to disk. This is for times when you need to export some or all of your contacts for use with another program, a DOS or Windows 95 based computer, or send the data to yourself via Internet. First, select the records to be exported . Choose Export from the Reports Menu. A dialog asks for your OK to Save the ASCII file. *Tip*

Tip:

InView comes with a file named "Contacts Utility." Contacts Utility has much easier and more capable export features. We left this Export form here for you oldies, but goodies, who are used to seeing here.

Contacts Utility should be located in your folder with the other HindSight files, and it's real simple to use for both importing to, and exporting from Contacts. Check out it's Documentation menu for help.

Custom Forms

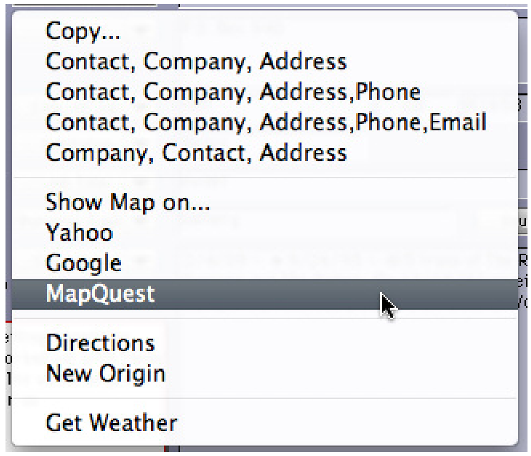
Custom Forms

Custom Forms opens a window listing any custom forms you've created. Beside the list are buttons giving you some options for dealing with your custom forms. With the exception of New and Close, click on one of the Custom forms listed to highlight it then click on the button that represents the action you want to take with the highlighted form. Click on Open to open it, Print to print it, Edit to revise it; Rename to give it a new name and Delete to delete it. Click New to create a new custom form or Close to get outta there.

Custom Forms also offers you the very attractive option of creating numerous forms of your own in a separate file. Attractive because it protects such forms from being reset when installing upgrades. See the section in Printing & Editing Reports chapter on Custom Forms.

Maps and Weather

Both the Address and City, ST Zip popups in the Contacts Data Record give you access to Maps and Weather based on the location of the displayed Contact. *Tip* ➧



To view a Map, choose one of the named map sites under Show Map in the popup menu. A selection opens your default browser and connects to the map site you've indicated.

There are entries that can cause the map to be blank indicating that the selected map site didn't find the address as displayed. Typos are an obvious cause, but if the street address is not on either the first or second line of the Address cell it will not be detected. If suite or apartment numbers are included but are not on either a separate line or set off by a comma, they're often treated as a part of the street address and may not be found.

Tip:

Maps and Weather use your browser to go to the appropriate web sites.

Therefore, a live internet connection is necessary for them to work.

Directions

To get driving directions, choose Directions from the menu and Yahoo maps is used to show how to get from your point of origin to the location in the Contact's record. If you've filled out the Company Info in Flow Chart, the address entered there is used as the starting point.

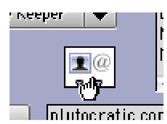
If you need a different or edited point of origin, choose New Origin, make the appropriate entries and then choose Directions. Once changed, if you Save in Contacts before Quitting, the New Origin is retained for future use. It can be changed again and again as desired and does not affect the Company Info.

Get Weather

When you choose Get Weather, your browser is directed to AccuWeather.com and the weather forecast for the Contact's location is displayed.

vCard Import and Export

Got an iPhone or Blackberry? This is a feature for you. The Contacts Data Record has the ability to import or export vCard formatted data.



Export vCard

To export, Select the Contact or Contacts to be exported. For exporting just the displayed Contact, click on the vCard icon in the Contacts Data Record. To export all selected Contacts, press Opt/Alt and click and hold on the vCard icon to produce a popup menu. Choose Export vCards. In either case, a window opens for you to select the name and destination of the exported vCard data.

Import vCard

vCard data can be imported from a file exported from another vCard application. Such files are named with a ".vcf" suffix. To import a ".vcf" file, drag it from the desktop onto the vCard icon in the Contacts Data Record. Or, in the Contacts Data Record press Opt/Alt and click and hold on the vCard icon to produce a popup menu. Choose Import vCards to open a window in which you can locate the file to be imported.

vCard data can also be imported by dragging one or many cards from another vCard program onto the vCard icon in Contacts.

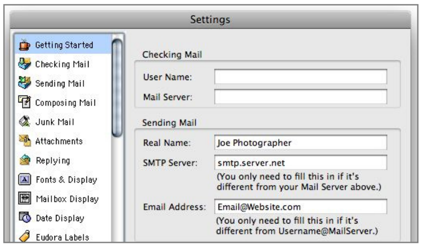
When importing vCard data, Contacts checks for any duplicates involved. Only exact matches can be detected. If duplicates are detected, you're asked how to deal with them. Click on No to have only any new names added. Click on Yes to have the new imported data replace existing data. Click Cancel to stop and review the selected set of duplicate entries.

When the import is completed, you're asked if you want to Save. If you have any doubts, don't. Check your data then Save or either use Revert to Saved or close the file without saving to undo the import.

Bulk Email via Eudora

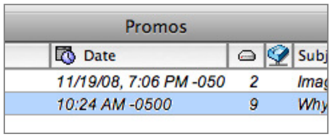
This method of sending bulk email from Contacts provides by far the easiest method yet for sending bulk email - or even one message - including images and font styles within the email, or to send attachments.

Unlike sending email through Correspondence, you cannot include personalization within the body of the email itself, so there is no ability to insert personalized touches like "Hi Joe, how's life in New York these days...". This new method does address each email individually though which helps prevent your message from being filtered as spam and does keep it personalized to that level.



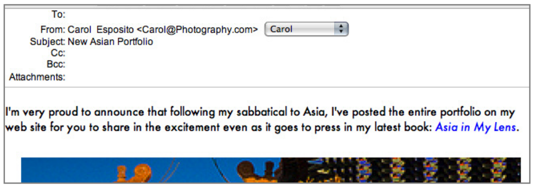
You do need Eudora installed and set up on your computer. Eudora is a free and excellent email program available for download from http://Eudora.com If you prefer to utilize other software as your primary email program, Eudora can be configured solely for sending email. Just leave the Checking Email portions of the setup empty as shown here.

Usage



Make a new Eudora Mailbox named Promos. Create an email message, sans Recipient, in Eudora exactly as you want everyone to receive it and save it in that Promos mailbox. To do that you simply Save the new message, then Transfer or drag it from the Out mailbox to Promos.

> *Tip:*
>
> Although you can include all sorts of exotic fonts in outgoing email, your recipient sees them using fonts installed on their computer.
>
> Stick to relatively common fonts for the best results - no matter what email software you're using to send your email



The message can include styled fonts and images or any other format that Eudora permits, making the potential very broad. ➧ *Tip*

You can have any number of ready to go emails in the Promos mailbox. Whichever one is LAST in the list is the one that gets used. If the Promos mailbox is sorted by date, to make an earlier message become the last message, open it, make any minor change such as adding and deleting a space and Save. You can also sort the mailbox by Subject, Priority or any other column. Whichever message is at the bottom of the list is the one that will get used.

Now select the Contacts you want to receive this email. *Hold Option and click on the Email button in the Contacts Data Record.*

Your intentions are confirmed then Contacts starts processing the last message it finds in the Promos mailbox. You will have a chance to check them as they sit queued in the Out mailbox for sending.

A Mailing Notation is added to each Contact's record using the Subject of the email message.

While the process of creating messages is running it's best to avoid clicking between InView and Eudora. Their inter-dialog can be interrupted which creates an error message such as "There is no last message in the Promos mailbox."At that point the process comes to a grinding halt.

If the process of creating and queuing messages is interrupted for any reason, you can use Find/Select to SelectWithin Mailings Not Contains and some piece of the Mailings memo being added. That selects the remaining Contacts for whom no message has yet been created.

Advisories

Send yourself as many test emails as it takes to get it right before sending to large numbers of people.

Be sure your ISP won't cut you off if you send too many emails in a single day. Some limit you to 200 and disable your service for 24 hours if you try to exceed it. Keep in mind that this is a per day limit, not per blast. Leave yourself a bit of wiggle room for some regular email exchanges.

Be aware of current spam rules before sending quantities of email. Look on our support forums at http://hsltd.us/hsforums/Forums.html in the FAQ section for a post on Email Promotions and SPAM for useful information.