



Sample Features in a Contact Management System



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Main Menu



All systems will open with an attractive Main Menu that incorporates your Organization's color scheme and logo.

This helps users navigate to the various system components and exit from the program.

Custom Contact Screens

All screens are customized with the fields and attributes that are important to you. For example, this client needed to track standard contact information as well as 'code' each contact with various attributes such as Constituency, Interests, Affiliations, and List Sources.

The screenshot shows a contact record for Ms. Lynn M. Lear, Director at Softek Services, Inc. The interface includes fields for contact details, a large text area for comments, and several dropdown menus for categorizing the contact. Metadata fields at the bottom show the record was entered on 4/30/01 and changed on 6/3/01 by user Admin.

The Comments field can be used to store general comments and notes about the contact.

Custom buttons can be added to help add/delete contacts, add new contacts in the same organization, or copy a contact's name and address to the clipboard so you can paste his/her information into any other Windows program.

The Date Entered, Date Changed, and User Name can be entered automatically.

Activity/Notes Log

An Activity/Notes Log can be used to store structured activity and notes. This information can easily be queried by Activity Code or Date Range in order to provide useful management reports.

Activity Code	Date	Comments (Shift-F2 to expand)	Username	Co
Sent Information	5/31/01	to assistant regarding services.	krosen	
Meeting	6/1/01	Will meet to review information.	krosen	
Followed Up	6/3/01	to see if she needed any additional information.	krosen	

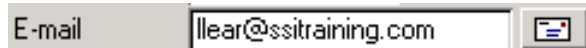
Record: 1 of 3

Custom Activity Codes can be entered here.

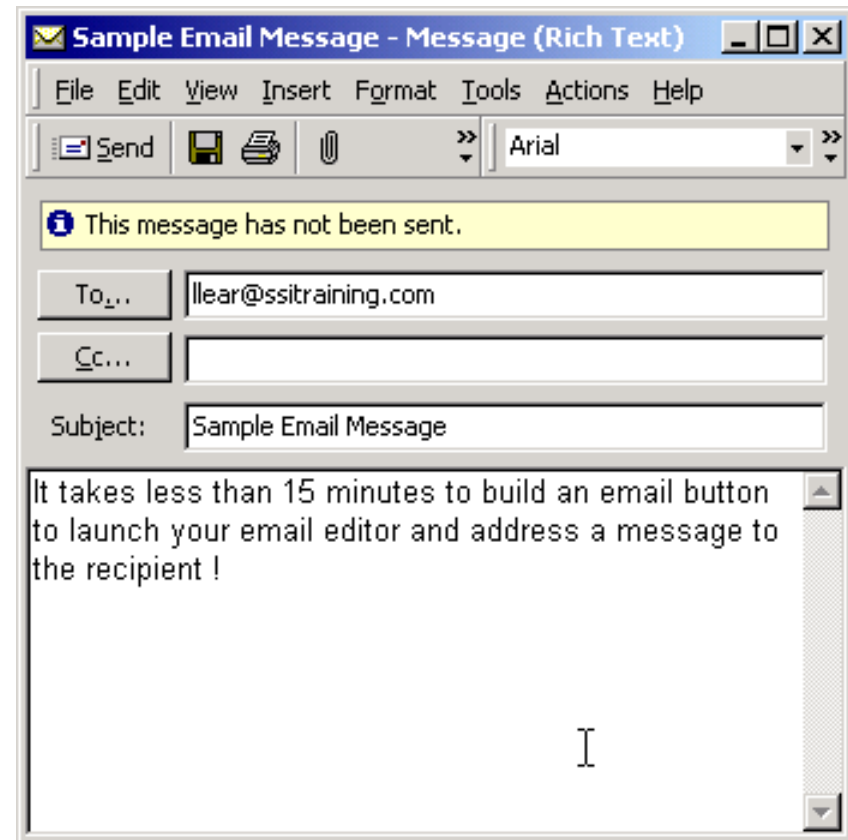
The current date will be inserted automatically, but you can enter your own date if desired.

Your username will be inserted automatically here.

Automatic Email



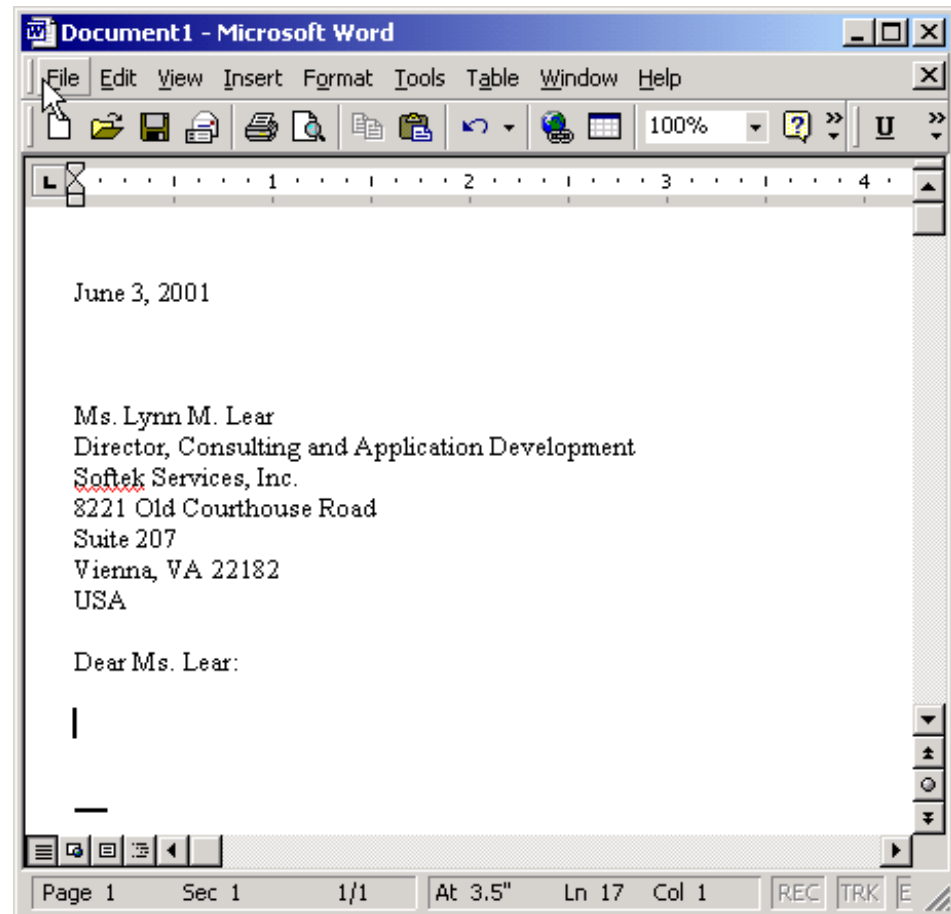
An Email button can be built to automatically launch your email program and address a new message to the recipient.



Copy Name and Address

Copy Name and
Address to Clipboard

A big time saving tool is having the ability to copy a contact's name and address to the clipboard so you can paste his/her information into another Windows program for a addressing a letter or envelope.



Multiple Contacts Within Orgs

Quite often, you will need to track multiple Contacts within the same Organization. Therefore, the Organization field could be more dynamic by displaying a drop-down list with all the unique Organization names entered into the system. A user can select an Organization from the list or start typing a name. When typing, the system automatically fills in the name as it finds matches.

Contact	Ms.	Lynn	M.	Lear	
Title	Director, Consulting and Application Development				
Organization	Softek Services, Inc.				EDIT

Clicking the EDIT button next to the Organization name on the Contact screen displays Organization information. This screen is used to store the main address and phone number for an Organization, which could be different than the Contact's information. This screen also lists all Contacts related or linked to the Organization.

Organizations [Close & Save]

Organization	Softek Services, Inc.	Acronym	Softek	Phone	(703) 506-8000
Street1	8221 Old Courthouse Road	OrgID	1959	Fax	(703) 506-8002
Street2	Suite 207				
Street3					
City/ST/Zip	Vienna VA 22182	Web	www.ssitaining.com		
Country					

Notes: This screen is used to store general information about the Organization. In most contact management systems, users need to track multiple contacts for various organizations. On the bottom of this screen, you will see all the contacts related to the current organization. Double-clicking on a contact will automatically take you to the Contact's information.

Related Contacts

Contact
Lynn Lear
Charlie Martinez

Note: Double-click on any Contact to View his/her details.

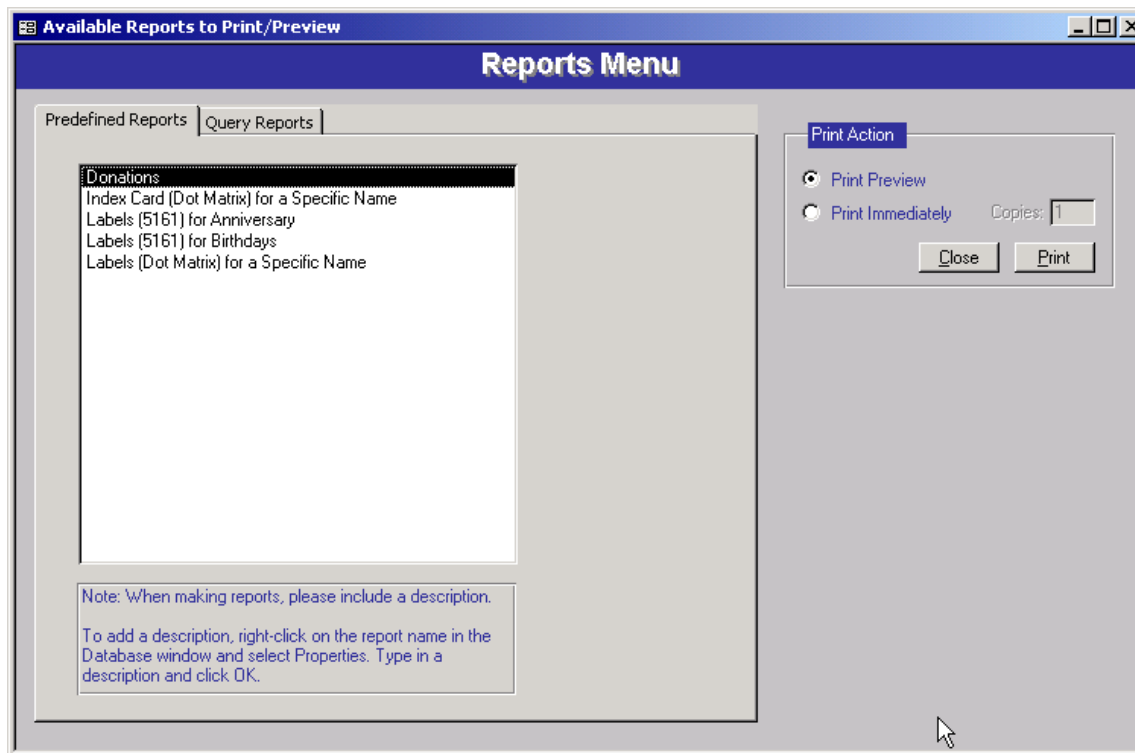
Record: 1 of 2

Date Entered: 6/3/01 Date Changed: 6/3/01 User Name: Admin

Record: 1959 of 1959

Easy to Print Reports

Although Softek can create custom reports for any new system, we like to encourage our clients to participate in the report creation process, if desired. With a little training and guidance, users can create their own custom reports. Our Report Menus are designed to show all reports created by either Softek or you.



Custom Report Interfaces

Custom Report interfaces can also be created based on the types of items you print most often. For example, the interface below was designed for a client that always printed labels or lists, but for various categories of contacts. This screen allows a user to select multiple categories and other coding fields, then print.

The screenshot shows a window titled "Available Reports to Print/Preview" with a sub-header "Reports Menu". The window is divided into several sections:

- Predefined Reports / Query Reports:** A tabbed interface with "Query Reports" selected.
- Select Contacts Matching:** A section with two lists:
 - ALL of the following Codes:** A list box containing "Caller", "CVLA", "Defendant", "Defense Attorney", "Email", "Fair Volunteer", "Investigating Officer", "Invite to Memorial Service", "Judge", "KC", and "Local Clergy".
 - ANY of the following counties:** A list box containing "Allegany", "Anne Arundel", "Baltimore City", "Baltimore County", "Calvert", "Caroline", "Carroll", "Cecil", and "St. Charles".
- Select a Format:** A list box containing "Labels - Dot Matrix", "Labels - Laser 5161", and "Listing".
- Print Action:** A section with two radio buttons: "Print Preview" (selected) and "Print Immediately". A "Copies:" field is set to "1". There are "Close" and "Print" buttons.
- Include Members Only:** A checked checkbox.
- Include X-Deleted:** An unchecked checkbox.

Custom Query/Export

Custom Query and Export interfaces can also be created to help users with little Access or database experience find and extract information.

Step 1: Select the Field, Comparison, and Enter Selection Criteria.

Step 2: Add the criteria to the area below. You can also delete criteria if you make a mistake.

Advanced Search

Query / Export

Close

Set Search Criterion | View Search Results | Export Selected Fields

Step 1: Select Field, Comparison, and Write Selection Criteria

Field: Constituency | Comparison: Equals (exact) | Criteria: Corporation

Step 2: Add Criteria to Area Below

Show records that meet the following criteria:

- [X] [State] Is Equal To Virginia

Step 3: Display Records | Clear All Criteria

Step 3: Display the records.

Query Results/Group Email

The Query results will appear on its own tab. After reviewing the results, users can easily click back on the first tab if they need to adjust the criteria.

The screenshot shows a window titled "Advanced Search" with a sub-tab "Query / Export". The window contains a table with the following data:

Prefix	FirstName	MI	LastName	Suffix	Title	Organization	Street1
Ms.	Lynn	M.	Lear		Director, Consulting and Appli	Softek Services, Inc.	8221 Old Co
Mr.	Charlie		Martinez		Senior Developer	Softek Services, Inc.	8221 Old Co

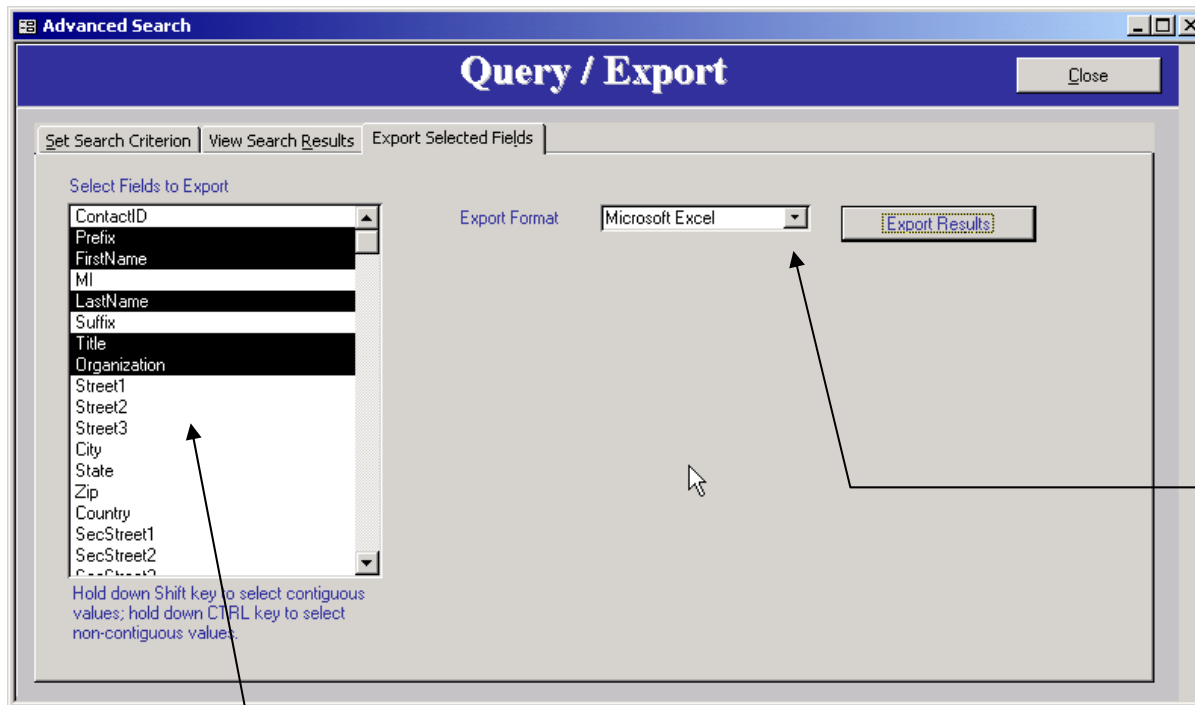
At the bottom left of the window is a button labeled "Send Group Email". At the bottom right, it says "Record Count: 2".

This will automatically launch your email program and address a new message to the entire group.

A record count appears.

Export Query Results

This Export screen allows users to select any combination of fields and the file format to export.



Users can select the file format (Excel, Ascii, Word Mail Merge, etc.)

Users can select their own combination of fields depending on the purpose of the export.



More

This was just a sample of some time-saving Contact Management features that can be built into any custom system.

Softek would be glad to demonstrate additional systems or provide ideas for custom features that would help better organize, manage, and process your information technology needs.

Please call or email if you would like to schedule a free initial consultation to meet our staff and learn more about our services.



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