

# CONTACTS DATABASE

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## 2 Revision History

The following table lists all revisions (including the original document) to this procedure, the date, and the reason for the revision.

Rev.	Rev. Date	Description of Change
00	2/10/07	Version 3.0

### 2.1 Discussion

Networking is the key to success in business. You need to know not only the basic contact information such as telephone number and address, but also where you met the contact and when it is time to follow up contact.

### 2.2 Database Setup

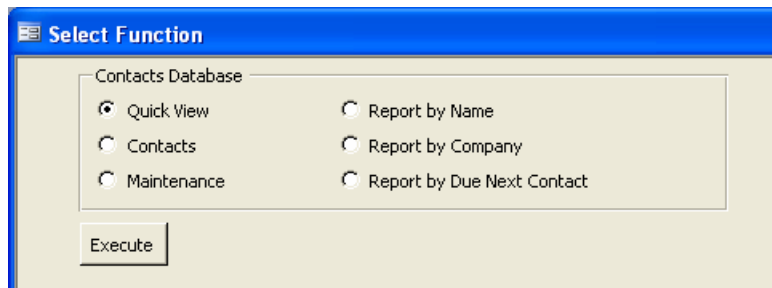
The database is a stand-alone database. Download it to any appropriate directory and rename it as desired.

## 3 Using the Database

Opening the database launches the main control panel, through which all functions are accessed.

### 3.1 Main Control Panel

Figure 1 – Main Control Panel



**Note:** When first using the database, it is recommended that background information such as default city and state, city names, phone types, etc. be set up using the maintenance function. See section 3.1.3.

The left side of the control panel accesses data entry functions. The right side of the control panel accesses report information.

### 3.1.1 Quick View

It is not necessary to run a report to look up data for a contact. You can find a person's name using the quick view function.

Figure 2 – Quick View Panel

Add	Name	Company	Lookup by
Edit	PVT Beetle Bailey, Infantryman	U.S. Army	BaileyBeetle
Edit	Mr. Fred Flintstone, Dino Operator	Slate Construction Company	FlintstoneFred
Edit	Mr. Elmer Fudd, Small Game Hunter		FuddElmer

Right click in either the company field or Lookup by field to sort the Quick View data for the most useful view.

Clicking on the Edit button will bring up the Detailed Contacts Information Screen (See Section 3.1.2) that contains all the important information for the contact. This screen can be used to update information for the contact.

Clicking on the Add button at the top of the Quick View Screen also opens up the Detailed Contacts Information Screen, this time to add a new record.

### 3.1.2 Contacts

Selecting the Contacts option opens up the Detailed Contacts Information Screen for data entry in a traditional screen-by-screen mode.

Figure 3 - Detailed Contacts Information Screen

ID	Title	First Name	Last Name	Job Title	
2	Mr.	Fred	Flintstone	Dino Operator	
<b>Full Name</b>		<b>Lookup Under</b>		<b>Level</b>	<b>Days</b>
Mr. Fred Flintstone, Dino Operator		FlintstoneFred		B	60
<b>Company Name</b>			<b>Company Type</b>		
Slate Construction Company			Mining and Manufacturing		
<b>Street Address</b>		<b>Post Office Box</b>		<input type="checkbox"/> Personal <input type="checkbox"/> Business <input type="checkbox"/> Network <input type="checkbox"/> Other	
111 Tarpit Drive				Other Type	
Bedrock	CA	90218-			
<b>Contact Information</b>				<b>e-Mail and Web Site</b>	
Cell Phone	(777) 555-8888				
				Referred by	WashingtonGeorge
				Source	
<b>Comments</b>				First Contact	2/10/2007
				Last Contact	2/10/2007
				Next Contact	4/11/2007
<b>Copy Address</b>					

**Table 1 – Detailed Contact Information Screen Field Definitions**

<b>Field</b>	<b>Description</b>
ID	Record ID field. It is used internally and cannot be changed.
Title	Personal Title such as Mr., Ms. Sen., etc.
First Name	First Name
Last Name	Last Name
Job Title	Position held by the person such as Executive Vice President, CFO, Sales Representative, etc.
Full Name	Full Name including the above information. This field is calculated automatically from the information provided above. It consists of Title + First Name + Last Name + Job Title. This information can be edited manually if it is not what is desired to be seen on reports. Once this field is filled in, it is not re-calculated.
Lookup Under	Sort Field: This field is also calculated from the above information. It consists of Last Name + First Name. This information can be edited manually if it is not what is desired to be seen on reports. Once this field is filled in, it is not re-calculated.
Level	How often to contact the person. The drop down values for this field is defined in the maintenance section (See section 3.1.3.4). The values that come with the database are A, B, and C representing contact at 30, 60, and 90 days respectively.
Days	Number of days to contact. This field is filled in automatically based on the level specified in the previous field. It can be overwritten with any numerical value.
Company Name	Company Name
Company Type	Company Type. Although there is no fixed list of company types it is recommended that the user develop categories so as to make this field more useful.

Field	Description
Address Information	<p>The next block of fields contain information for mailing purposes. The right side is the street address and the left side is the post office box. It is assumed that the street address and post office box are in the same city and state.</p> <ul style="list-style-type: none"> <li>• City: The default city is defined using the Defaults Screen (See Section 3.1.3.5). The drop down list is defined using the Cities Screen (See Section 3.1.3.1). Free form entry is also allowed.</li> <li>• State: The default state is defined using the Defaults Screen (See Section 3.1.3.5). The dropdown list is defined in the States Screen (See Section 3.1.3.2). Free form entry is also allowed.</li> <li>• There are two fields for zip code. The first is associated with the street address, the second is associated with the Post Office Box.</li> </ul>
Contact Types	<p>These 4 check boxes and field are used to flag the type contact the person is.</p>
Contact Information	<p>Phone information: Up to 5 different phones can be tracked for the person.</p> <ul style="list-style-type: none"> <li>• Phone Type: the first of the phone fields is the phone type (Business, Toll-Free, Cell, etc.). The drop down list for phone type is defined using the Phone Type Screen (See Section 3.1.3.3). Free form entry is also allowed.</li> <li>• Phone number: This field is the actual phone number. It is automatically formatted to (NPA)-NXX-XXXX.</li> <li>• Extension: This field can be used for a phone extension although any text value can be entered.</li> </ul>
e-Mail and Web Site	<p>Two fields are provided to enter email address and web site address.</p>
Referred by	<p>This field can be used to record the person who referred you to the contact. The drop down list contains all the other contacts in the database, but free form entry is also allowed.</p>
Source	<p>This field can be used to record the source of the contact such as Chamber of Commerce After Hours, Technical Seminar, etc.</p>
Comments	<p>This field can be used to record miscellaneous comments.</p>
First Contact	<p>Enter the date of first contact here. By default the current date is entered.</p>
Last Contact	<p>Enter the date of the latest contact with the person. If a value is not already filled in the current date is entered by default.</p>

Field	Description
Next Contact	<p>If a last contact is entered, and level and days are also filled in, the database will re-calculate a next contact date by adding the number of days specified in the Days Field to the Last Contact Date.</p> <p>The calculated value can be overwritten, but will be recalculated when a new last contact date is entered.</p>
Copy Address	<p>This button copies the person's name and address to the Window's Clipboard from where it can be pasted into other applications.</p>

### 3.1.3 Maintenance Forms

There are four maintenance forms to set the Cities, Phone Types and Level of Contact used in the various drop down lists and to set the default city and state.

**Figure 4 – Table Maintenance Form**

The screenshot shows a window titled "Maintenance Items" with a light beige background. Inside the window, there is a list of five radio button options: "City Table", "State Table", "Phone Types", "Level of Contact", and "Defaults". The "State Table" option is selected, indicated by a filled radio button. Below the list of options is a button labeled "Execute".

### 3.1.3.1 City Table

The City Form is used to enter in a list of cities to be used by the drop down list in the address section.

**Figure 5 – City Form**

City Name	
▶	Albany
	Hartford
	Hoboken
	Middletown
	New York City
	Paramus
	Rochester
*	

To add a city, simply enter it in on the last line. It will automatically be sorted into alphabetical order on the drop down list. To delete a city click on the right-pointing triangle (▶) at the left of the record and press the delete key.

### 3.1.3.2 State Table

The State Form is used to enter in state information. The database comes with this table populated with United States states, territories and military address codes.

**Figure 6 – State Form**

State Name	Abbreviation
▶ Armed Forces Americas	AA
Armed Forces Middle East	AE
Armed Forces Europe	AE
Armed Forces Canada	AE
Armed Forces Africa	AE
ALASKA	AK
ALABAMA	AL
Armed Forces Pacific	AP
ARKANSAS	AR

To add a state, simply enter it in on the last line. It will automatically be sorted into alphabetical order by state name on the drop down list. To delete a state click on the right-pointing triangle (▶) at the left of the record and press the delete key.

### 3.1.3.3 Phone Types

The Phone Types Form is used to enter in the phone types used in the drop down list. The database comes with this table populated with the values shown below.

Figure 7 – Phone Types Form

Phone Type	Sort Order
▶ Home Phone	1
Business Phone	2
Cell Phone	3
Pager	4
Toll Free	5
Fax	6
*	0

To add a state, simply enter it in on the last line. It will automatically be sorted in order by the value entered in the Sort Order Field on the drop down list. To delete a state click on the right-pointing triangle (▶) at the left of the record and press the delete key.

### 3.1.3.4 Level of Contact

The Level of Contacts Form is used to enter in how often a person should be contacted. The database comes with this table populated with the values shown below.

Figure 8 – Level of Contact Form

Value	Days between Contacts
▶ A	30
B	60
C	90
*	0

To add a level, simply enter it in on the last line. It will automatically be sorted in order by the value entered in the Value Field on the drop down list. To delete a level click on the right-pointing triangle (▶) at the left of the record and press the delete key.

### 3.1.3.5 Defaults

The default city and state can be set using this form.

Default Name	Value
City	New York City
State	NY

Records can not be added or deleted from this form. Furthermore, the Default Name field is locked and the set defaults "City" and "State" cannot be changed. The only values that can be changed in this table are the default values.

### 3.1.4 Report by Name

Clicking this option results in a dialogue box that directs the use of a mail merge template supplied with the database. (See Section 4).

### 3.1.5 Report by Company

Clicking this option results in a dialogue box that directs the use of a mail merge template supplied with the database. (See Section 4).

### 3.1.6 Report by Due Next Contact

Clicking this option results in a dialogue box that asks for the number of days into the future to search for contacts due. For example, entering in 90 days will get all contacts due within the next 90 days. Overdue contacts are also shown.

**Figure 9 – Contacts Due Report**

<b>Contacts Due Report</b>		
No stars = due in over 30 days / * = due within 30 days / ** = due within 7 days / *** = overdue		
<b>Due next on Thursday 02/15/2007</b>		
Mr. Elmer Fudd, Small Game Hunter	Business Phone (888) 555-1234 1234	**
<hr/>		
<b>Due next on Monday 03/12/2007</b>		
PVT Beetle Bailey, Infantryman		*
<hr/>		
<b>Due next on Wednesday 04/11/2007</b>		
Mr. Fred Flintstone, Dino Operator	Cell Phone (777) 555-8888	
<hr/>		

Dates are presented in ascending order (earliest date first).

## 4 Using Mailmerge

MS-Access has good reporting capabilities, but MS-Word provides a much better means to format the data into a telephone-book-like structure. To accomplish this function, two MS-Word Mailmerge Templates have been provided: mail\_merge\_company and mail\_merge\_name.

Unfortunately, Microsoft has never figured out the concept of a relative path (I.e, there is no provision to tell MS-Access or Word, "Look in the same directory with you, dummy."). You will either have to name your servers the same as mine, or map your drives the same as me. In either case, you'll also have to have the same directory structure.

Because Mailmerge uses an absolute pathname, you will have to map the data source and probably reset the sort options.

Since each version of MS-Word implements a completely different way of doing mail merges (it gets increasingly complicated as Microsoft "improves" its products). I will not outline the procedures here.

Connect to the data source and select the query qry\_by\_company.

The results of the by company mail merge are shown in the following report. The by name report is the same except that the entries are sorted by name.

Figure 10 – Mail Merge Report

<b>ADDRESS BOOK</b>	
<b>BY COMPANY</b>	
<b>Acme / Acme Company</b>	<b>U.S. Army</b>
Mr. Elmer Fudd, Small Game Hunter 1818 Rabbit Road Paramus, NJ 09183 Business Phone .....(888) 555-1234 1234 Cell Phone .....(888) 555-2345	Mr. Bilbo Baggins, Freelance Bounty Hunter Thorin & Company 1 Bagshot Row Hobbiton, IE
Mr. Joe Palooka, Professional Boxer 1756 Ave B New York City, NY 10001 Home Phone .....(212) 555-8847 Business Phone .....(212) 555-7126 123 Toll Free .....(888) 555-8892	PVT Beetle Bailey, Infantryman U.S. Army Camp Swampy Blackstone, VA 24567
Wyle E. Coyote, Inventor Acme / Acme Company 12 10345th Street Phoenix, AZ 99837 wcoyote@splat.net Home Phone .....(765) 555-7483 Cell Phone .....(765) 555-9347	
Ms. Blondie Bumstead, President Catering by Blondie 1785 W. 34th Street New York City, NY 10023 bbumstead@good2eat.com Home Phone .....(212) 555-2746 Business Phone .....(212) 555-0256 Toll Free .....(212) 555-9947 Fax .....(212) 555-8372	
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Mr. Fred Flintstone, Dino Operator Slate Construction Company 111 Tarpit Drive Bedrock, CA 90218 Cell Phone .....(777) 555-8888	