



# Quick Reference Guide

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## Getting Started – PC

Before signing into the Wired system the following options must be setup on your Internet Browser. This will ensure that the Wired system will function efficiently.

1. The Webpage must be refreshed everytime it is displayed.
  - a. **Internet Explorer (IE)** – TOOLS-> INTERNET OPTIONS-> GENERAL TAB -> Browser History -> Settings -> Every time I visit the webpage.
  - b. **Firefox** – TOOLS -> OPTIONS -> TOOLS-> ADVANCED TAB -> Cache – Use up to 0 MB of space for the cache.
  - c. **Safari** – EDIT -> PREFERENCES -> ADVANCED TAB -> Click on Show Develop menu in menu bar. Click on the DEVELOP TAB from the TOOLBAR – Check the Disable Caches.
2. Setup the Pop-up blockers (Wired utilizes POP-up).
  - a. **IE** – TOOLS -> INTERNET OPTIONS -> PRIVACY TAB. If you have the Turn on Pop-up Blocker checked continue to the Settings and add the WiredContact under the Address of website to allow and press ADD
  - b. **Safari** – EDIT -> PREFERENCES -> Under the Web Contact uncheck Block pop-up windows
3. Setting Cookies
  - a. **IE** – TOOLS-> INTERNET OPTIONS -> Under Settings click on the ADVANCED button and check – Override automatic cookie handling, First-party Cookies: Accept and Third-party Cookies: Accept and OK
  - b. **Firefox** – TOOLS -> OPTIONS -> PRIVACY TAB -> Under the Cookies section click on Accept cookies from site
  - c. **Safari** – EDIT -> PREFERENCES -> SECURITY TAB -> Under Accept Cookies ->

## Getting Started – MAC

Before signing into the Wired system the following options must be setup on your Internet Browser. This will ensure that the Wired system will function efficiently.

1. The Webpage must be refreshed everytime it is displayed.
  - a. **Firefox** – Select FIREFOX on the TOOLBAR -> Select Preferences -> Open the Advanced TAB -> Select the Network TAB – Under the Offline storage : Use up to 0 MB of space for the cache
  - b. **Safari** – Open the SAFARI Menu -> Select the Preference option \_ . Select the Advanced TAB -> Check the box : Show Develop menu in Menu Bar -> Click on the Develop Menu (on TOOLBAR) and Click on the Disable Caches.
2. Setting the Cookies
  - a. **Firefox** – Select FIREFOX on the TOOLBAR -> Select Preferences -> Open the Privacy TAB -> Under the Cookies section Check: Accept cookies from site –OR- Uncheck Accept cookies from site AND click on the EXCEPTION button and enter the WiredContact address to the list of exceptions
  - b. **Safari** – Open the SAFARI Menu -> Select the Preference option -> Open the SECURITY TAB and Under the Accept cookies section Check: Only from sites you navigate to.
3. Setup the Pop-up blockers
  - a. **Firefox** – Select FIREFOX on the TOOLBAR -> Select Preferences -> Open the Content TAB -> Uncheck the Block pop-up window – OR- leave the box checked and click on the EXCEPTION button and enter the WiredContact address to the list of exceptions
  - b. **Safari** – Open the SAFARI menu -> Uncheck the Block Pop-up Windows (if checked)


## Logging on Wired & My Record

Sign onto the Internet and type in the Web Address provided to you by your systems administrator. The WIREContact logon screen should then appear

User Name:  Password:

Type in your User Name (which is NOT case sensitive) and Password (which IS case sensitive) and press Login

**DEMO Site – <http://demos.wiredontact.com>**

The MY RECORD usually appears the first time you sign-in. You can also click on  to view and update MY RECORD.

MY RECORD – This is all the information about you, which can be used on E-mails, Letters, etc.

<b>Company</b>	Stevens Electronics	<b>Address</b>	505 Semson Street
<b>Contact</b>	Gail Stevens		
<b>Title</b>	General Manager		
<b>Department</b>		<b>City</b>	Syracuse
<b>Phone</b>	312-443-4700	<b>State</b>	NY
<b>Mobile Phone</b>	312-485-9425	<b>Zip</b>	19130
<b>Fax</b>		<b>Country</b>	United States
<b>Salutation</b>		<b>Country</b>	United States
<b>ID Status</b>	Customer	<b>ERail HTML</b>	gail@yahoo.com
<b>Industry</b>		<b>URL</b>	
<b>Region</b>		<b>Last Results</b>	
		<b>AUM</b>	



Complete the screen (if you have dynamic pages, the information will be saved automatically, if not press SAVE).

You can come back to MY RECORD to update it at any time.

To Logoff the system press



## Edit User Settings

On the MY RECORD  you also have the capability of Editing your User Settings .



WiredContact Enterprise  
User Settings Dialog

A PIN is an additional layer of security. Up to 12 characters. Can be reset by your administrator. Used to access this dialog.

PIN:

UserID: Gail Stevens      Active Edit On  Active Edit Off

Password:       Active List Edit:  
Confirm Password:       Click to Show Edit  Always Show Edit

Country Code: +1

Timezone Offset:

Forget alarms older than: 14 days

Start Page: lookup

Show Reply Address List

Show Signatures

Import Text Data    Import Data from Databases

- **Pin** is a Password for the User Settings. It can be as long as 12 characters.
- **UserID** – Defaults to your Wired User Name
- **Active Edit On / Active Edit Off** – You have the ability to turn on / off the ACTIVE EDIT capability by clicking on these radial buttons.
- **Password / Confirm Password** – You can change your Wired Password here. You must type it in both fields to confirm that you have typed it correctly.
- **Country Code** - Type in the Country Code +1 for the USA. This is the number which will be used on the phone numbers.
- **Timezone Offset** – If the time from where your server is located. If your server is on Eastern Standard time and you live in Pacific Coast time, set this to -3.
- **Forget Alarms older than** – You can specify the number of days to remove alarms from your system.
- **Start Page** – Use the dropdown menu to select the screen which comes up when signing on to Wired.
- **Show Reply Address** – Click here to enter a reply e-mail address
- **Show Signature** – Click here to enter your electronic signatures

## Customer Accounts – Basic Look-up



Clicking on this icon on the SIDE BAR will automatically bring you to the Look-up screen, regardless of what screen you are presently on.

There are 3 sections to Look-up screen.

1. Field (indicated in red)
2. Operands (indicated in green)
3. Values (indicated in blue )

### Steps for Look-up

1. Click on Field's blue drop down to locate the field that you want to search on.
2. Click on the operands blue drop down to locate the type of operand to use for the search
  - a. \*= starting with
  - b. = equal to
  - c. =\* ending with
  - d. >= greater than or equal to
  - e. <= less than or equal to
  - f. \* contains
3. Click on the value field and enter the information you want to search on.
4. Click on the button
5. Your results will display on the bottom of the screen it will display the number of contact which met the criteria | Showing 1-25 of 99

## Customer Accounts – Advanced Look-up

There are 3 advanced options to the right of the look-up boxes.

- **Or Look-up** – There are 2 main reasons to use OR look-up.
  - If you want ANY of the entered criteria to be True (i.e. If the Last Meeting or Attempt was before 06/01/2008)

- If you want to locate multiple items for one field.(i.e. If you want to see your clients in NY, NJ or PA)

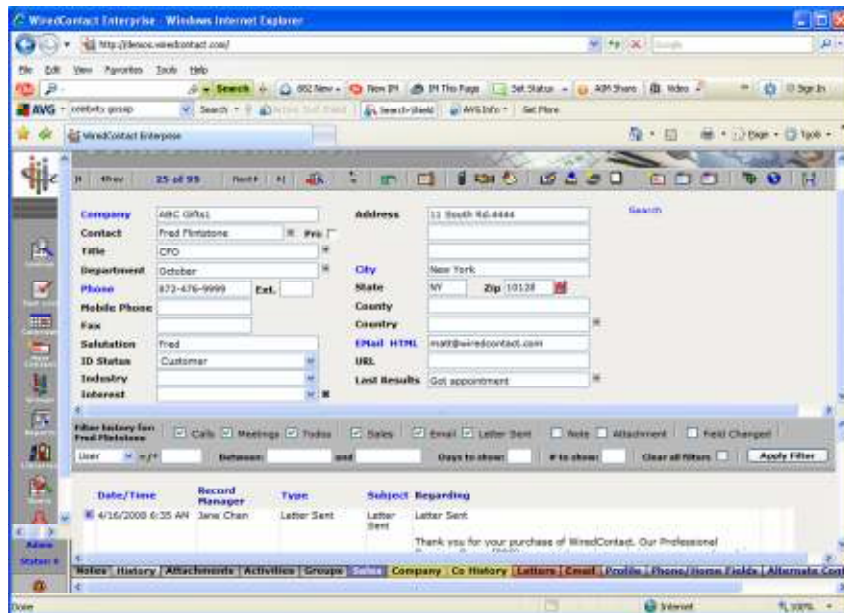
- **Add to Look-up.** If you have already performed a look-up and now you want to add another group to the current look-up
- **Narrow Look-up** – If you want only a sub-set of the current look-up.

There is a Keyword search, to locate your contact by entering a part of the name of the contact, company, state, etc.

Once you have a look-up displayed to can limit or exclude items, by checking the box to the left of the contact record and selecting – Lookup Selected or Omit Selected

## Customer Accounts – Contact Record

Once you have located your contact the following information is available (the information on the contact screen can be customized, so if you want additional information, contact your system administrator)



### Drop Down Box Options:

- - Allows you to type your own information or select the + to select an item from the drop down box.
- - Requires you to select an item from the drop down box.
- - Allows you to select multiple items from the drop down box
- Zip code connection. By entering a zip code the city, state and county automatically populate

## Customer Accounts – Contact Icons

There are many options available to you by using the icons across the top of the Contact record. These include:

- Go to the First Contact from Look-up list.
- Go to the previous record from Look-up list.
- 22 of 56** - Displays the Current record of look-up of # of records.
- Go to the next contact from the look-up list
- Go to the Last Contact from the Look-up list
- Return to the Look-up (perform another search)
- Refresh the current contact screen.
- Review & undo changes made to Current contact
- Go to MY RECORD
- Schedule a call with the current contact
- Schedule a meeting with the current contact
- Schedule a "ToDo" with the Current contact
- Record a Call/Meeting/ToDo to History (skip Task List)
- Attach a file (Word, Excel, etc.) to the current contact.
- Create a New Sales Activity/Opportunity for the current contact
- Enter a new note for the current contact.
- Create a New Contact
- Create a New Contact by duplicating the fields of the Current contact.
- Create a New Contact by copying the primary fields of the current contact
- Directions to the Contact
- Map
- Merge the contact with another contact record



## Customer Accounts – TABS

Along the bottom of the screen are additional features available from the TABs. Additional TABS can be added by your system administrator.



**Notes** - View all the notes entered for a contact

**History** - View the history of a contact including the meetings, Calls, Todos, Sales, E-mails, Letters, Notes, Attachments and Field Changes

**Attachments** - See all the attachments (word, excel, etc.)

**Activities** - See all the future plans for contact ( calls, meetings, Todos)

**Groups** - View (add) groups that the contact belongs to.

**Sales** - View all the sales opportunities for the contact (Open, Closed-Won, Closed-Lost)

**Company** -

**Co History**

**Letters** - All the letter templates available to send to the contact

**Email** - All the e-mail templates and features to e-mail the contact

**Profile** - Profile (additional fields) available about the contact.

**Phone/Home Fields** - Additional fields to enter the phone and home information.


**Alternate Contact** - Additional fields to enter more contacts

## Task List – Scheduling Appointments

There are 3 main types of appointments in the Wired system: Calls, Meetings and Todos. These can be scheduled from the Look-up Screen, Contact Information screen or the Calendar. If you are on the Look-up screen or Contact Information screen (after you select the contact) you select from one of three icons to make your appointment:

### Types of Meetings:

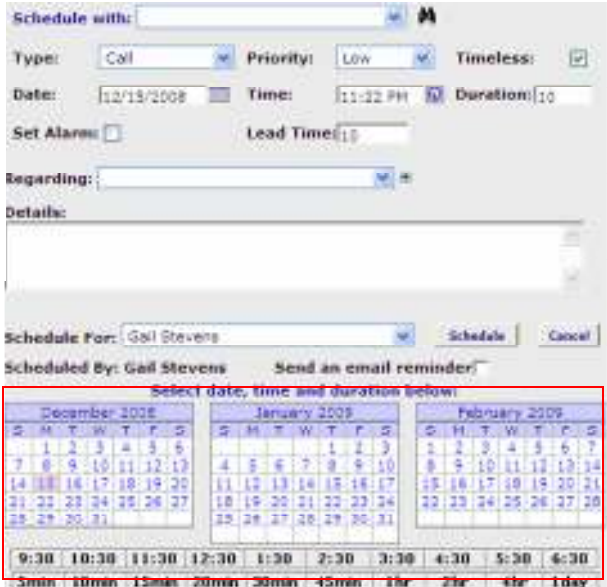
 - Schedule a Call

 - Schedule a Meeting

 - Schedule a ToDo

The following screen will appear (if you are on the calendar, you would select a Date/Time and the same screen appears):

Who  
What  
When  
About



Schedule with:  M

Type:  Priority:  Timeless:

Date:  Time:  Duration:

Set Alarm:  Lead Time:

Regarding:

Details:

Schedule For:

Scheduled By:

Select date, time and duration below:

December 2008							January 2009							February 2009						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6		1	2	3	4	5	6	7	1	2	3	4	5	6	7
7	8	9	10	11	12	13	8	9	10	11	12	13	14	8	9	10	11	12	13	14
14	15	16	17	18	19	20	15	16	17	18	19	20	21	15	16	17	18	19	20	21
21	22	23	24	25	26	27	22	23	24	25	26	27	28	22	23	24	25	26	27	28
28	29	30	31				29	30	31					29	30	31				

9:30	10:30	11:30	12:30	1:30	2:30	3:30	4:30	5:30	6:30
Sun	10min	15min	20min	30min	45min	1hr	1hr	1hr	1hr

Click on a Date/Time

**Who** is the meeting with, **What** type of meeting is it, **When** is the meeting plan and **What** is the meeting **About**.

## Task List – Reviewing the Task List

The Task List provides you a quick view of all your scheduled activities (Meetings, Calls and ToDOs) in one area. This list can also be printed to bring with you through the day



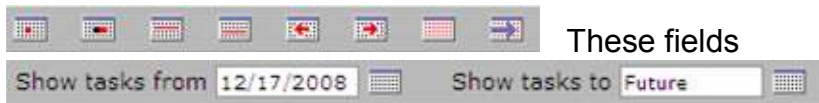
### How to Filter the Information you see:

Check off the boxes or enter information on the 2<sup>nd</sup> line



### Task List Views Available:

These icons set .....



These fields

**NOTE:** You can also enter dates by typing them in these fields or selecting the calendar to the right.

### View Definition from left to right:

- View Today
- View Tomorrow
- View This Week
- View Next Week
- View Past – From 1<sup>st</sup> day on system till today
- View the Future from today to any future appt
- Show ALL Task from start of system
- Rollover – move TASKs from current date to another date  
(ex. why – if you were out sick)

- Select another person's task list to view
- Print the Task List

## Task List – Printing the Task List

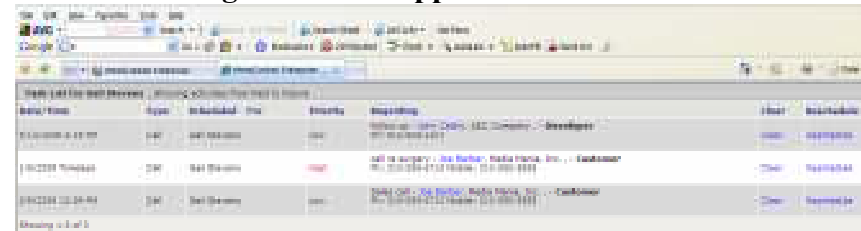
1. Click on the Task List icon
2. Select the Date range for the tasks that you want to print.



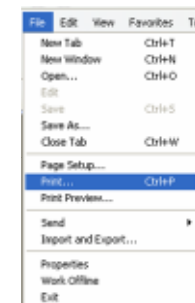
3. The Task List will display



4. Click on the Print Task List button the following screen will appear:



5. Select File -> Print



6. Select your print and press PRINT

## Task List – Clearing the Appointments

Clearing appointment happen when you've completed, need to make notes or cancel an appointment. Depending on the **TYPE** of appointment will determine what options you have when clearing an appointment.

The process starts when you first navigate to the TASK LIST and select **Clear** .button which is to the right of the appointment information. A screen which is similar to the make an appointment screen will appear.

Results: Call Complete

TYPE	Clear Options
CALL	Call Attempted Call Completed Call Erased Call Left Message Call Received
CUSTOMER SERVICE	Call Completed
MARKETING CALL	Call Completed
MEETING	Meeting Erased Meeting Held Meeting Not Held
OTHER	Attachment Field Change Letter Sent Note
SALE	Closed/Won Sale
SERVICE CALL	Call Complete
TODO	E-mail Sent E-mail Fax Sent ToDo Done To Do Erased To Do Not Done

After you press **Clear** the information will be removed from the Task List. The highlighted items above will be moved to the HISTORY TAB

## Task List – Rescheduling Appointments

There are many times when you plan an appointment and need to re-schedule. There are 2 ways to re-schedule appointments. The first is one appointment at a time and the other is a group of appointments at a time (i.e. out sick and need to re-schedule).

### Re-schedule a single appointment:

On the TASK LIST click on the **Reschedule** button and the following screen will appear:

**Reschedule**

Enter a new Date/Time and press **Reschedule** .  
NOTE: Any of the information can be updated on this screen.

Date/Time

1/6/2009 8:00 AM

You can also click on the 1/6/2009 8:00 AM and the date/time will become underlined in a blue dashed line, which means you can type the new date/time/

### Changing multiple appointments to a new date/time

Click on the ROLLOVER button and all the appointments on the displayed task list will display. Check the box under the **Selections** and select a date to move the appointments to and press Roll Over Selected

Roll Over Selected to 1/17/2009



## Calendar – Overview

To navigate to the Calendar click on the icon



The Wired Calendar provides you the capability to plan your schedule, view your schedule or modify your schedule.

You can view the calendar by:

Day Week Month

Select the left arrow to view previous dates

Select the right arrow to view the next dates

- Pressing on the binoculars will move all the contacts presently displayed on your calendar view to the look-up screen so you can further review the contact

- If you have the security access to view multiple employee's schedule, press this button to select the person's schedule you would like to view.

- If you are on the Day or Week view of the calendar, each time slot will have an to open the window to schedule a new appointment or to view an appointment.

- (FILE->PRINT) – If you want to print the current view of the calendar (to take with you).

## Calendar – Scheduling Appointments

Navigate to the Calendar click on the icon



Click on the + sign on the Date/Time you want to schedule an appointment

	Sunday February 8	Monday February 9
7:00 AM		
7:30 AM		
8:00 AM		
8:30 AM		
9:00 AM		
9:30 AM		
10:00 AM		

The Appointment schedule screen will then appear

**Schedule with:** John Cellini

**Type:** Call **Priority:** Low **Timeless:**

**Date:** 2/9/2009 **Time:** 9:00 AM **Duration:** 10

**Set Alarm:**  **Lead Time:** 10

**Regarding:**

**Details:**

**Schedule For:** Gail Stevens **Schedule** **Cancel**

**Scheduled By:** Gail Stevens **Send an email reminder**

Enter the Type of Appointment, Date/Time (timeless), Duration of the appointment, Regarding and Details.

You can also set an ALARM and Lead Time for the alarm.

## Calendar – Viewing Appointments

Click on the Calendar icon











You can view the calendar by

- Day 
- Week 
- Month 

The calendar displays 3 months at a time. To see months prior or after this point use the Left ← & Right → arrows.

All the appointments which have been scheduled will appear on the calendar with an icon indicating the type of appointment:

Call 	Other 
Customer Service 	Sales 
Marketing Call 	Service Call 
Meeting 	To Do 

If you are on the **Day** view you will see the icon, with the details of the appointment. If you are not on the Day view, to view the details of the appointment, click on the icon and the appointment detail will appear. You can view or modify this information.

## New Contacts – Entering a New Contact

Click on the New Contact icon




The Contact Information will appear:


Fill in all the applicable information. (This screen can be modified to add/remove fields – contact your system administrator).





The screenshot shows a form for entering a new contact. It is divided into two main columns: 'Company' and 'Address'. The 'Company' column includes fields for Contact, Title, Department, Phone, Mobile Phone, Fax, Salutation, ID Status, Industry, Interest, Carrier, and Business Type. The 'Address' column includes fields for City, State, Zip, County, Country, EMail HTML, URL, Last Results, Ins. Type, and Client Billing. There are also checkboxes for 'Pri' and 'M'.


You also have the ability to add additional information using the icons across the top of the CONTACT screen


Schedule a Call 


Schedule a Meeting 


Schedule a To Do 


Write an Appointment to History 


Attach a File 


Create a New Sales Opportunity 


Add a New Note 


Add another New Contact 

Duplicate a Contact (All Fields) 

Duplicate a Contact (Primary Fields) 

Directions 

Map 

Print 

## Groups – Starting a New Group

**GROUPS** are a convenient way to organize the quickly access a group of related contacts which you frequently use.

1. Create a Group by clicking on the sidebar icon





2. Click on the New Group icon on the top bar



3. The following screen will appear:


Group Name	<input type="text"/>	SIC Code	<input type="text"/>
Description	<input type="text"/>	Industry	<input type="text"/>
Division	<input type="text"/>	Revenue	<input type="text"/>
Region	<input type="text"/>	Number of Employees	<input type="text"/>
Ticker Symbol	<input type="text"/>	Referred By	<input type="text"/>
URL	<input type="text"/>		

4. Fill in all the applicable fields. If the **SAVE** disk is not present, the information will be automatically saved
5. View your Groups by clicking on the  icon **MY GROUPS**
6. View your recently accessed Groups by clicking on the  icon **ALL RECENT GROUPS**

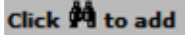
## Groups – Adding to Groups

There are many methods to adding a contact(s) to a Group.


### LOOKUP

1. Perform a LOOKUP of a group or single contact.
2. Once the listing in the LOOKUP results has the contacts to be added press the ADD TO GROUP 
3. This will display the LOOKUP GROUPS screen.
4. Locate the Group and **SELECT** the Group and the contacts will be added to the Group

### GROUP – CONTACT TAB -

1. Locate the GROUP and display the details of the Group.
2. Select the CONTACT TAB on the Group detail screen.
3.  which will bring up a Contact Lookup screen.
4. Enter the criteria to locate the Contact and once you select the Contact, it will be added to the Group.

### CONTACT – GROUP TAB -

1. Locate the Contact from the Lookup screen.
2. View the Contact Information record and select the GROUP TAB.
3.  which will bring up a Group Lookup screen.
4. Enter the criteria to locate the Group and once you select it, the contact will be added to the Group.

## Groups – Viewing Groups




On the sidebar select the Group icon

Like the Lookup, the Group section has the ability to locate Groups by using search criteria.

Enter the information to locate the GROUP and press



The Groups which meet the criteria will display in the results section below. You can modify the columns which display in the results section by using the Change Field icon


To view the details of a Group, click on the  and the Group Record will display. The top of the screen will display the details about the Group. On the bottom of the screen there are multiple TABS which can provide additional Information.

- **Contact** – Displays a listing of all contact in the group.
- **Notes** – Notes written about the Group
- **History** – History of all activity for the Group
- **Activity** – All planned activity for the Group
- **Sales** – Sales projects for the Group
- **User Fields** – Place to define your own fields
- **Address Fields** – Additional Address Information.
- **Group Status** – Status information on the Group

## Groups –Deleting Accounts from a Group

There are multiple ways to remove a CONTACT from a Group.

### CONTACT – GROUP TAB

1. Lookup the Contact and click on the GROUP TAB. All the Groups the Contact is affiliated with will display.
2. Next to each group will be a **red dash** . Click on the red dash.
3. You will be prompted with a question confirming if you want to remove the contact from a Group



4. OK will remove the Contact from the Group. Cancel will KEEP the contact with the Group.

### GROUP – CONTACT TAB

1. Lookup the Group on the GROUP screen and view the details of the Group.
2. Select the CONTACT Tab, which will display all the Contact affiliated with the Group. Next to each Contact is a **red dash**. Click on the red dash of the contact to be removed.
3. Once you click on the dash the Contact will be removed from the Group.

NOTE: If you do not see the RED DASH, you do not have the security access to remove the records. Call your system administrator for assistance.

## Reports – Running a Standard Report



Select the Report icon from the sidebar.

### WiredContact comes with the following Standard Reports:

1. Sales Reports
2. Contact Reports
3. Activity Reports
4. History Reports
5. Timeline

### Next to the report is an indication on how the report pulls information.

1. **This MONTH** – Pulling the information in your database which meets the current month's activity
2. **Today's Date** – Pulls all the information in your database which meets the Current Date.
3. **Lookup** – This report will provide information on all the Customers which are presently in your lookup. This information can be obtained from performing a Lookup or performing a Query and moving the information to a Lookup. If running one of these reports, first ensure the records are in your lookup before going to the REPORT section.
4. **Last Week** – Pulls all the information in your database which meets the criteria for Last Week.

### To run a Report

1. Go to the Report section
2. Click on the Report you want. [Click on EXCEL if you want the report in Excel format]
3. If the Internet options were setup to allow pop-ups, the report will appear. All reports also are saved in the Personnel Library (under Reports).

\*\* See you System Administrator for Additional Reports.

## Reports – Running a Wizard Report



The Report Wizard provides you the options to build your own report. After moving to the REPORT section, click on one of the Wizard Report icons.

1. Select a Report Template (this will define what fields will print on your report. Use the dropdown menu to view all the available templates.)

Select a template: SummarySales (select sorts).f

2. If you have access to multiple user, select which user's information you want on the report.

Select from:

- Drew Smith
- George Carter
- Jane Chan
- Jen Jones
- Juliette Ross
- Lesley Anderson
- Matt Vocci
- Ralph Rosarky
- Robin Henry
- Wendy Rudofker

Selected:

- Gail Stevens

3. Enter the Data Range of the Report

Select a date range:

Close Date between and

4. Enter the Criteria (use the dropdowns)

Select criteria:

Not = And Or

5. Enter your Sorting requirements

Sort by:

Summary on this field? no Descending

6. Limit the information from a Group, Lookup or save a the Lookup after the report runs.

Limit To Group:

Limit To Lookup: Save Results To Lookup:


7. Enter the Name and Format (.html, .xls, etc) of the report and Press Request Report

Request Report Please wait... sale\_report.html





## Library – Main Library

The Main Library is a place where your organization can place documents for your use. While everyone can view the information, only your system administrator can add or remove documents.

To get to the Library click on the  icon found on the side bar.




Under the LIBRARY Folder there can be two types of folder.

- The folder without the plus  when clicked on, will display the documents within the folder.
- The folder with the plus  when clicked on, will open one or more sub-folders. Sub-folders can also contain folders.

The documents which are in the folder display on the right-hand side of the screen. You can open these documents by clicking on them.

## Library – Personnel Library

The Personnel Library is a place where you can keep your documents, reports and queries. If your REPORT did pop-up while running or if you need to refer back to it, HERE is where you come.

To get to the Library click on the  icon found on the side bar. The Personnel Library is on the lower portion of the screen. The default folder under the Personal Library are:



- New Folder. (Adding a New Folder)

1. First Click on the Folder that you want this new folder to go under (it could be the Personal Library, Queries, etc.) For this example I am placing a new folder under the REPORTS folder.
2. Click on the New Folder button
3. Enter the folder name and UPDATE.



- Add File – (Adding a New Document)

1. Open the Folder for where you want the document to go and press the Add document icon.



2. Browse and locate the file and press UPDATE.

## Query – Basic

The Query process is a more advanced lookup to locate customer contacts. There are more fields available to you and search capabilities.



1. Click on the sidebar icon
2. On the Top of the screen you enter your criteria

- a. Use the Dropdown menu to locate the field(s) you want to search on
- b. Enter the operand for the search
- c. Enter the information you are looking for
- d. If entering multiple lines and ALL the lines must be true, don't check the OR box. If ANY of the information can be true, check the OR box.
- e. If mixing AND / OR in the criteria, you must use the parenthesis.
- f. If the information you are looking for should NOT be True, click on the NOT box.

3. Once all the information has been entered, click on the Query NOW button and the results will display on the bottom of the screen.

If you want to move the results of the QUERY to the LOOKUP (to work with the records or for reporting purposes), click on the Copy to Lookup.

Query Results: [Copy to Lookup](#)

## Query – Advanced

Rules when running more complex Queries:

### 1. Operands

- = EQUAL TO
- > Greater Than
- >= Greater Than & Equal to
- < Less Than
- <= Less Than & Equal to
- <> is not equal to
- contains:** field has this
- starts with:** fields start with
- ends with:** field ends with
- month=** date field equal this month

2. If you are mixing AND / OR you must use parenthesis around the Fields. If searching for the same field use OR (State = NY, NJ or PA)

### Advanced Query Examples –

Locate ALL the Customer's in PA who are listed as Prospect A -OR- Prospect B:

Find all the Customers and Prospects (A or B) which you met with:

Display all the Customer that have e-mail addresses:


Find ALL the Customers in NY, NJ or PA


Find all your Meetings in the Month of October

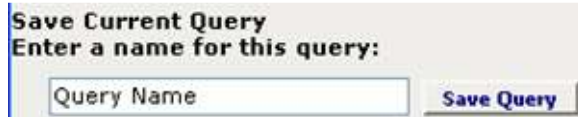
## Saving Queries

If you use the same **QUERIES** over and over, you can save them.

1. Go to the Query section
2. Enter the criteria for the Query
3. Run the Query and validate that the records returned is the information you were looking for.


If you want to modify the query, use the REFRESH button, which will bring up the Last Query which you ran .

4. If you are satisfied with the results, press the Save Last Query button 
5. You will be prompted to enter a name for the QUERY



6. Enter a meaningful query name and press the SAVE QUERY button.

### The next time you want to run a **SAVED** Query



1. Go to the Query section
2. Click on the My Saved Query folder . You will have two types of SAVED

- **Public Query** – Queries which can be used by anyone in your organization
- **My Saved Queries** – Queries which YOU have saved and can be used only by you.

Click on the query you want to run (the saved query will display on the QUERY screen). You can run the query as is, or modify it and Press **QUERY NOW** .

## Modify Drop Down Values

You must have the permission set to update this option. If the information is not available on your screen, contact your system administrator to make the necessary updates.

1. Start the process at MY RECORD  [3<sup>rd</sup> icon from the left of the LOOKUP view].
2. Click on the  Edit User Settings
3. At the bottom of the screen there are 3 options, click on the 3<sup>rd</sup> option – Field Dropdowns

Import Text Data    Import Data from Database    **Field Dropdowns**

4. Select the Table, Field and Show - Dropdowns

Modify database dropdowns/popups: select the table, then select the field, then click on the Show link to show the list.



\*\* In this example I am updating the ID/Status dropdown.

5. The Current Values of the Dropdown will appear. You can Add, Remove or Update values, by clicking in the box and making the changes.

#### Dropdown Information for Field IDStatus:

Competitor  
Customer  
Director  
Friend  
Supplier  
Vendor  
Broker  
Prospect A  
Prospect B  
Client  
Candidate  
Developer  
Suspect  
Franchisee  
Candidate  
Life Insurance  
XYZ

6. Once the Updates are done you can:

Close Window    Remove Duplicates



**NOTES**

**NOTES**