



Training Course: Lookup

Tuesday, January 14, 2009
10:00 – 11:00 am EST



Agenda



- **Overview of the Lookup Screen**
 - Icon across the Top & Down the side
- **Performing a Basic Lookup**
 - Fields
 - Operands
 - “What” you are looking for
 - Getting Results
- **Navigating the Lookup Results**
 - More Detail
 - Jump
 - Look-up Selected vs. Omit Selected
 - Making Appointments from the Lookup
 - Creating e-mails from the Lookup
 - View the Contact record (s)
 - Changing Column Headings
- **Advanced Lookup**
 - OR Lookup
 - Add to the current Lookup
 - Narrow the current Lookup
 - Key Word Search
- **Questions & Answers**

Overview of the Lookup: icons



TOP LOOK-UP ICONS:

- My Contact
- Recent Contact
- My Record
- New Contact
- Entire look-up:
 - New Note
 - Schedule Call
 - Schedule Meeting
 - Schedule DoTo
 - Refresh Look-up
- Group Look-up
- History Look-up
- Sales Look-up
- Activity Look-up
- Change Fields
- Print
- Previous Look-up

Top Bar icon changes depending on the screen that you are on.

Left Bar icon are ALWAYS present

Lookup:

Company	*=		State	=	
Last Name	*=		State	=	
First Name	*=		State	=	
Company	>=		Zip	*=	
Phone	*=		Country	*=	

Keyword Search: **Lookup Now**

Lookup Results:

Contact	Company	City	Email	State	ID Status
<input type="checkbox"/> John Smith	<input type="checkbox"/> John Smith Co	Aliso Viejo		MA	<input type="checkbox"/> Customer
<input type="checkbox"/> Tom Gallagher	<input type="checkbox"/> WiredContact				<input type="checkbox"/> Customer
<input type="checkbox"/> Sergio Craig-Ward	<input type="checkbox"/> WiredContact UK	Philadelphia	sergio@wiredcontact.co.uk	East Sussex	<input type="checkbox"/> Customer
<input type="checkbox"/> Tom Jones	<input type="checkbox"/> Jones & Company		wendy@wiredcontact.com		<input type="checkbox"/> Web Lead
<input type="checkbox"/> *Paul King	<input type="checkbox"/> WiredContact UK	Philadelphia	paul@wiredcontact.co.uk	East Sussex	<input type="checkbox"/> Client; Friend

Showing 1-5 of 5

Previous: 1 2 3

Lookup: Fields & Operands



Fields:

To find the contacts you are looking for. Use the to view all the fields available to you.

Values:

The information you are looking for. The + will provide you with a drop down box of values.

Lookup:

Company	<input type="checkbox"/>	*=	<input type="checkbox"/>	<input type="text"/>	+	State	<input type="checkbox"/>	=	<input type="checkbox"/>	<input type="text"/>	+
Last Name	<input type="checkbox"/>	*=	<input type="checkbox"/>	<input type="text"/>	+	State	<input type="checkbox"/>	=	<input type="checkbox"/>	<input type="text"/>	+
First Name	<input type="checkbox"/>	*=	<input type="checkbox"/>	<input type="text"/>	+	State	<input type="checkbox"/>	=	<input type="checkbox"/>	<input type="text"/>	+
Company	<input type="checkbox"/>	>=	<input type="checkbox"/>	<input type="text"/>	+	Zip	<input type="checkbox"/>	*=	<input type="checkbox"/>	<input type="text"/>	+
Phone	<input type="checkbox"/>	*=	<input type="checkbox"/>	<input type="text"/>	+	Country	<input type="checkbox"/>	*=	<input type="checkbox"/>	<input type="text"/>	+

Keyword Search:

Operands:

- *= - Starting with
- * - Containing
- = - Equal to
- =* - Ending with
- >= - Greater than or equal to
- <= - Less than or equal to

Lookup NOW Button:

Depending on what we entered find the results and display them below

Lookup: Getting Results



Lookup

Lookup:

Company	*=	A	+	State	=		+
Last Name	*=		+	State	=		+
First Name	*=		+	State	=		+
Company	>=		+	Zip	*=		+
Phone	*=		+	Country	*=		+

Keyword Search: **Lookup Now**

- 1st Enter the information you are looking for:
 - Example above – All companies starting with “A”
 - All customer ins a State, City, Zip Code, etc..
- 2nd Press button **Lookup Now**
- 3rd – See Results of LOOK-UP below

Lookup: Getting Results



- The Look-up results provided you with all the contacts where the COMPANY started with “A”

Lookup Results: Jump: [1] [50] [100] [150] [200] Jump To: >>

Contact		Company	City	Email	State	ID Status
<input type="checkbox"/> blank name		Abbott	Columbus		OH	<input checked="" type="checkbox"/>
<input type="checkbox"/> blank name		ABC	Burbank		CA	<input checked="" type="checkbox"/>
<input type="checkbox"/> blank name		ABC	Hatboro	bill@ms.com	PA	<input checked="" type="checkbox"/> Shareholder
<input type="checkbox"/> blank name		AccruePartners	York		SC	<input checked="" type="checkbox"/>

At the bottom of every Look-up Results page you will see

- How many contacts were found (234 in this example)
- How many pages exist

Select Next/Prev to see the next/previous page of results

Select First/Last to go to the 1st or Last page of results



Move the results of a look-up to a Group

Showing 1-25 of 234 Next Last

Lookup: Navigation the Results



- Update contact information directly from the look-up by clicking on the field to be updated (this will turn underline the field with a blue line).

Company	City
<input type="text" value="Abbott"/>	<input type="text" value="Columbus"/>

- Update the field with the new information
- If there are more than 2 pages of results, you can jump to the 1st, 50th, 100th, 150th or 200th record or enter a **Jump To** [record #]

Jump: [1] [50] [100] [150] [200] Jump To: >>

- If you want to work with a selected group of records from the lookup (make appointments, view contact information, send e-mails, etc.), you can keep or remove records from the look-up results by checking off boxes and using the Lookup Selected or Omit Selected buttons

<input checked="" type="checkbox"/>	George Carter		<input type="checkbox"/>	ABC Gifts
<input checked="" type="checkbox"/>	Andrew Cassin		<input type="checkbox"/>	ACT Today
<input type="checkbox"/>	Steve Charles		<input type="checkbox"/>	ABC Inc.

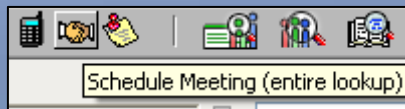
Showing 50-74 of 234 First Prev Next Last


- **Lookup Selected** – will keep the records that you checked
- **Lookup Omit** – will remove records that you checked

Lookup: Navigating the Results



- If you want to make an appointment for the entire lookup press the Call, Meeting or To Do (or note) from the icons across the top. An appointment screen will appear to enter the Date/Time, Regarding and details.



- To view the contact information from the Look-up click on the  and the following will appear:

Contact		Company	City	Email
blank name		- e Another	London	
 Company	Another	Address	16 Thee Street	Create Date 5/19/2005 2:45 PM
Contact				Edit Date 8/12/2005 9:37 AM
Title				Sales Rep
Department		City	London	
Phone	013-445-6663 Ext.	State		Zip
Fax		Country	UK	
Salutation		e-mail		
ID Status		Last Results		
Web Site				

- Close the screen by using the blue up arrow.

Lookup: Navigating the Results



- To view the History or Scheduled appointments, click on the and the icons will appear

State		ID	Status
OH			
CA			

- The will display the saved history of the contact and the will display the future scheduled appointments for the file.
 - » Example of History Information (same information you would see on the contact History TAB)

Date/Time	Record Manager	Type	Subject	Regarding
1/6/2009 12:00 AM	Wendy Smith	Note	Leads	List from ABC Company



- » Example of the Future Information (same information you would see on the contact Activity TAB)

Date/Time	Type	Priority	Scheduled For	Scheduled By	Regarding	Clear	Reschedule
7/17/2008 11:00 AM	Meeting	High	Jen Jones	Jen Jones	Demonstration	Clear	Reschedule
7/31/2008 3:20 PM	Todo	Low	Zach Paul	Zach Paul	Assemble catalogs	Clear	Reschedule
11/19/2008 7:06 AM	Call	Low	Zach Paul	Zach Paul		Clear	Reschedule

- Click on the up arrow to close the History or Activity window
- Click on the left arrow to close the icons

Lookup: Navigating the Results



- To send an e-mail to a customer from this Look-up results, click on the  and the e-mail window will open, already addressed to the contact.
- To view the details of the contact record, click on one of the  and the following screen will appear:


The screenshot shows a software interface titled "Contact Information". At the top, there is a navigation bar with "Prev", "3 of 230", and "Next" buttons, along with various icons. The main area contains a form with the following fields:


Company	ABC	Address	11 S. York Rd.	Search
Contact	<input type="text"/>		<input type="text"/>	
Title	<input type="text"/>	City	Hatboro	
Department	<input type="text"/>	State	PA	Zip 19040
Phone	<input type="text"/> Ext. <input type="text"/>	County	<input type="text"/>	
Mobile Phone	<input type="text"/>	Country	<input type="text"/>	
Fax	<input type="text"/>	E-Mail HTML	bill@ms.com	
Salutation	<input type="text"/>	URL	<input type="text"/>	
ID Status	Shareholder	Last Results	Discussed opportunities	
Industry	<input type="text"/>			
Interest	Yes			

At the bottom, there is a navigation bar with the following tabs: Notes, History, Attachments, Activities, Groups, Sales, Company, Co History, Letters, Email, Profile, Phone/Home Fields, Alternate Contact, Status, Library.

Lookup: Navigating the Results



- Changing Column Headings  found on the icons across the top of the lookup page. This allows you to change the columns (what displays and the order it displays) in the Lookup results section.

1. Click on the 
2. The current field listing will display
3. Change the field(s) that you want (in this example field 4 was changed from e-mail to zip) and press SAVE
4. Now the LOOKUP results display:

Select Column fields:

1. Contact*	<input type="checkbox"/>
2. Company*	<input type="checkbox"/>
3. City	<input type="checkbox"/>
4. Email	<input type="checkbox"/>
5. State*	<input type="checkbox"/>
6. ID Status*	<input type="checkbox"/>

4. Zip

Save

Lookup Results: Jump: [1] [50] [100] [150] [200] Jump To: >>

Contact	Company	City	Zip	State	ID Status
<input type="checkbox"/> blank name	Abbott	Columbus		OH	<input checked="" type="checkbox"/>
<input type="checkbox"/> blank name	ABC	Burbank		CA	<input checked="" type="checkbox"/>
<input type="checkbox"/> blank name	ABC	Hatboro	19040	PA	<input checked="" type="checkbox"/> Shareholder

Lookup: Advanced Lookup



Lookup:

Company	=		+	State	=		+
Last Name	=		+	State	=		+
First Name	=		+	State	=		+
Company	>=		+	Zip	=		+
Phone	=		+	Country	=		+

Or Lookup
Add To Lookup
Narrow Lookup

Keyword Search: **Lookup Now**

There are a couple of advanced functions on the lookup - OR, ADD TO and NARROW.

- **OR Lookup** – If you use the same field value more than once in the look-up criteria, then you will need the OR Look-up box checked. [Example – Find all the Customer in NY, NJ and CT (state=)]
- **ADD TO Lookup** – If you like the results you have, but need to add more contacts to it, enter new criteria and check the ADD TO Look-up [Example: You have displayed all the contacts from NY to make an appointment for a Sales Show, but decide to also add your contacts from NJ. Enter State=NY, check the Add To Look-up and the results will be both your NY and NJ Customers.
- **Narrow Lookup** – This is the opposite from ADD TO. If you have displayed your contacts from NY and NJ and decide to only make appointments for NJ, enter State = NY, click on Narrow Look-up and your results will be NJ Contacts only.

Questions & Answers



WIREDCONTACT