

LISTS OF CONTACTS - PRINT AND EXPORT

Index-> CLI - Contacts Lists

Management Windows

ACCOUNTING Management Window (AC)
Chart of Accounts, Financials, Trial Balance, Transactions, Journal Entries

COST CODES Management Window (CC)
Cost Codes, Master Pricing, General Matls and Labor Check Lists

JOBS Management Window (JO)
Jobs and Job Lists

VENDORS and PAYABLES Management Window (AP)
Vendors, Lists, Payables Transactions, 1099's, Waivers, Insurance Audits

CUSTOMERS / PAYORS and RECEIVABLES Mgt Window (AR)
Payors or Customers, Lists, Receivables Transactions, Invoices, Statements

BANKING Management Window (BA)
Bank Account Balances, Reconciliations, Bank Ledgers, Deposits, Checks

PAYROLL Management Window (PM)
Employees, Lists, Payroll Processing, W2s, 941, Unemp., Other PR Reports

CONTACTS, Labels, Letters, Etc. Management Window (CN)
Contacts, Lists, Labels, Letters, PostCards, and Activity Reports

DOCUMENTS (DOX)

To print lists of Contacts OR to export lists of contacts to an Excel spreadsheet, type 'CLI' into the Index field on the Navigation/Home window.

OR, click on the Contacts link under the Management Window, and use the Contact Lists button on the window that opens.

On the 'Contacts Lists - Criteria and Reports' window, use the 'From' and 'To' fields to select the contacts or other criteria to display in the list window. Click the 'View All' button to show all contacts.

Use toolbar buttons to print various types of Contact Lists reports.

See next page for information about exporting lists to an Excel spreadsheet.

REPORTS-> Sorted Lists | Grouped Lists | Go To Labels, Letters, and Postcards | Go To Contacts Management

Contacts Lists - Criteria and Reports

Use the Toolbar at the top of the window to view CHS Payor/Customer List Reports.

View All

	From	To	
CONTACT	ALAMOTITLE	zzztest	Reset
CONTACT TYPE	AGENT	SUPPLIER	Reset
SOURCE	Employees Table	Vendors Table	Reset

View Contacts Not Shown

Save As Excel Spreadsheet

NOTE: Labels can be printed for selected Contacts by using the Contacts Management Reports screen.

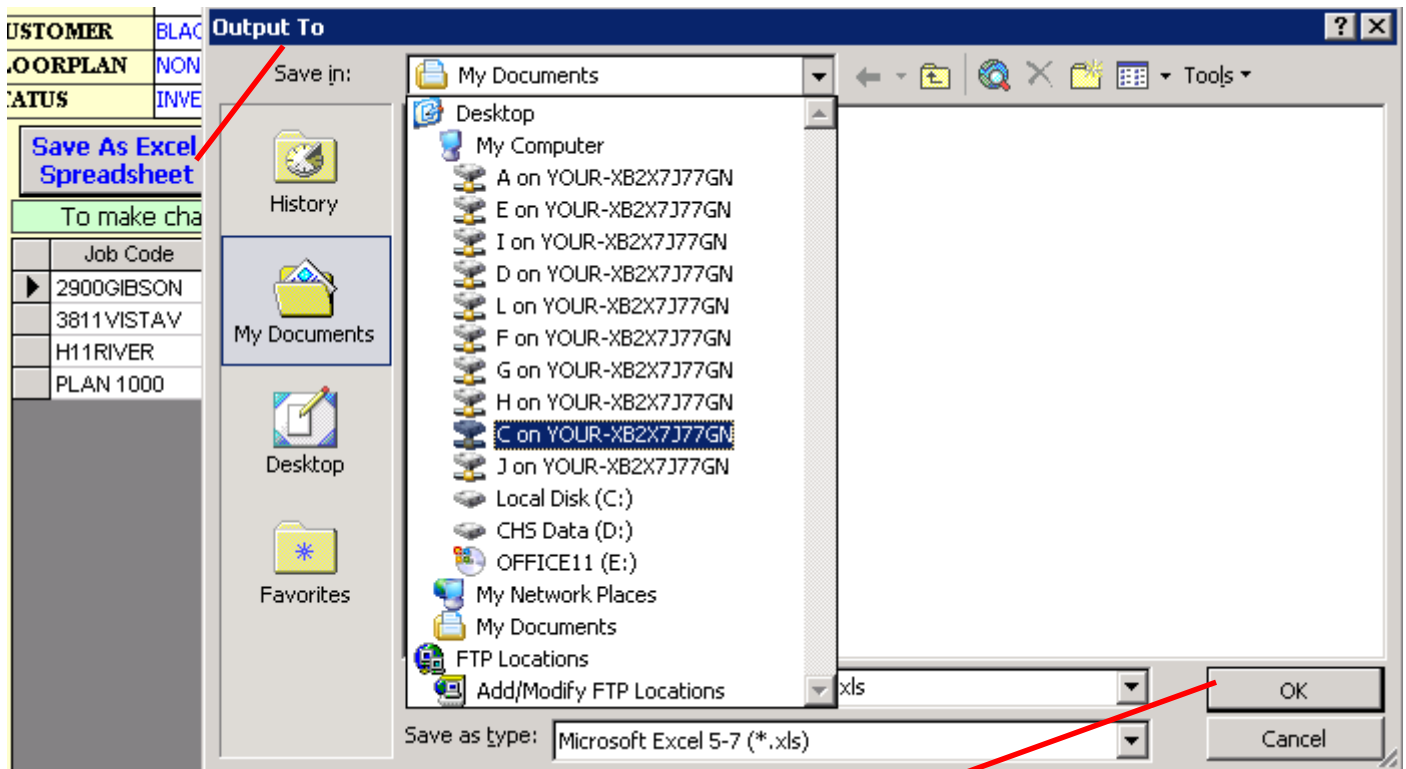
To make changes to the Contact's setup record, Double Click on the Edit Field for a Contact in the list below.

Contact ID	Edit	Vend/Emp	Payor	Name	Type	Source	Contact Names
▶ ALAMOTITLE	Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALAMO TITLE COMPANY	PAYOR TABLE	Payors Table	
AMEX	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AMERICAN EXPRESS	SUPPLIER	Vendor/Emp Table	Americ
AMEXOPTI	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AMEX OPTIMA	OVERHEAD	Vendor/Emp Table	Americ
ARROYO	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ARROYO FRAMING, INC.	SUB-CONTRACTOR	Vendor/Emp Table	Leo Arroyo PO Bo:
ATABEXAR	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ATA/BEXAR TAXIDERMY	OVERHEAD	Vendor/Emp Table	
AUDIOVID	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUDIO VIDEO ENVIRONMENTS	SUB-CONTRACTOR	Vendor/Emp Table	3456 M
AUSBLDG	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUSTIN BUILDING PRODUCTS	SUPPLIER	Vendor/Emp Table	13724
AUSBUSJO	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUSTIN BUSINESS JOURNAL	OVERHEAD	Vendor/Emp Table	
AUSCOUNT	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUSTIN COUNTERTOPS	SUB-CONTRACTOR	Vendor/Emp Table	11108
AUSPROF	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUSTIN PROFESSIONAL COURIERS	SUPPLIER	Vendor/Emp Table	149 Te
AUSSTAR	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUSTIN STAR ROOFING	SUB-CONTRACTOR	Vendor/Emp Table	Tom Davis 1608 V
AUSWROUG	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUSTIN WROUGHT IRON	SUB-CONTRACTOR	Vendor/Emp Table	Reece Jackson 222 W
BANKOFAM	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BANK OF AMERICA	OVERHEAD	Vendor/Emp Table	P.O. Br
BATCITY	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BAT CITY PRODUCTIONS	OVERHEAD	Vendor/Emp Table	Joseph Maloukis P.O. Br
BEAUCHAM	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KENNETH D. BEAUCHAMP	SUB-CONTRACTOR	Vendor/Emp Table	Kenneth D. Beauc 1343 C
BETTERBB	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BETTER BUSINESS BUREAU/CENTRAL TEXAS	OVERHEAD	Vendor/Emp Table	2101 S
BETTIS	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BETTIS SERVICE COMPANY, INC.	SUPPLIER	Vendor/Emp Table	5306 M
RINCH&M.I	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RIFNIFFR RINCH&M	OVERHEAD	Vendor/Emp Table	1000 T

Record: 1 of 142

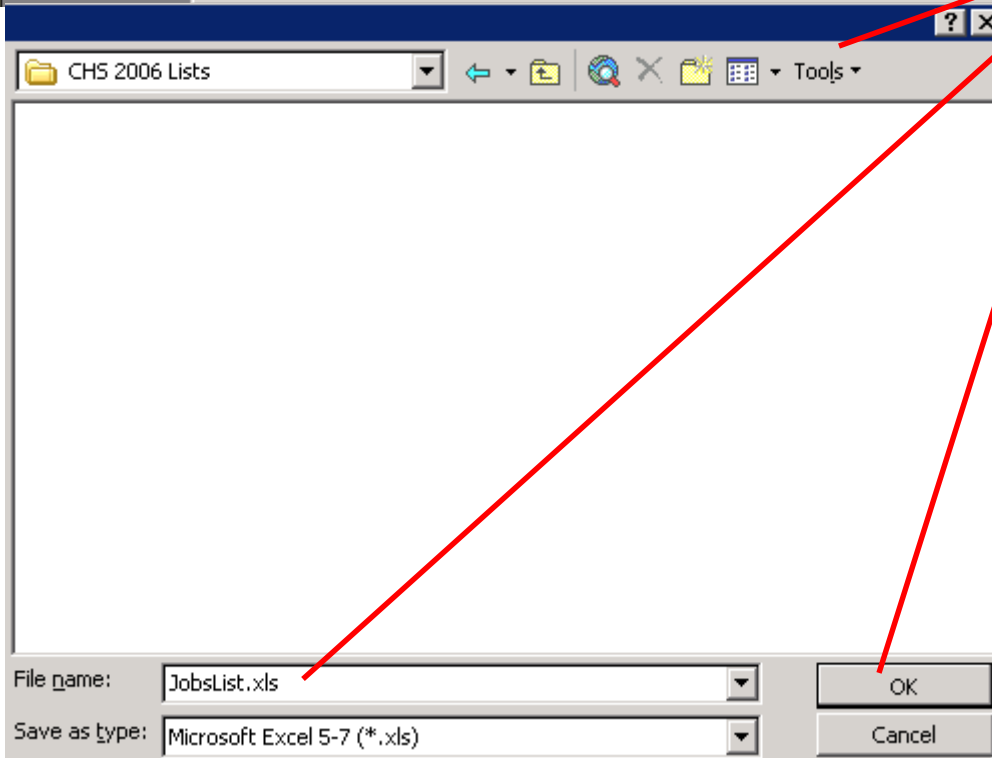
EXPORT LIST DATA TO AN EXCEL SPREADSHEET

You can save the list data by clicking the button labeled 'Save As Excel Spreadsheet'.



Assign an appropriate name to the file.

Then click the OK button. When it is finished, you will receive a message that it has been saved. To open the file, open Microsoft Excel, and open the file from wherever you saved it.



NOTE TO REMOTE USERS:

IF you save a file to 'My Documents' on the Remote Server, you will not be able to open it until it is downloaded to your own computer. Please follow the instructions in the 'Remote User Guide' about downloading files from the server to your own computer.

IF you navigate to your own computer to save the file, then downloading as mentioned above will not be necessary. HOWEVER, it CAN be faster to quickly save to My Documents on the server and then download later. This will avoid waiting for the program to calculate AND download at the same time.