

Contacts Management

Find-> **BROWNJAC** Add New Contact Report of Activities For Contact Shown Delete

CONTACT ID BROWNJAC **TYPE (select or type)>** CUSTOMER **ACTIVITY NOTES**

NAME JACK AND JILL BROWN Had meeting to sign contract. Jack is hoping that we can begin as soon as possible. We discussed beginning on December 1 and that the project will take 6 months.

SETUP DATE 11/9/2003 **SOURCE (select or type)>** PAYORS TABLE

CONTACT(S) Jack and Jill Brown

Salutation Name(s) Jack and Jill Brown

ADDRESS 100 BROADWAY

CITY AUSTIN

STATE TX **ZIP CODE** 78704-

Email: JackAndJill@somewhere.com

Entry Date	Activity (select or type)	To Do Date	Done Date	Job	NOT
12/15/2001	Call To Make	12/16/2001		H11RIVE	Need
12/15/2001	Phone Call Received	12/15/2001	12/15/2001	H11RIVE	Jack called to say he was concernec
12/2/2001	Began project	12/2/2001	12/2/2001	H11RIVE	
11/20/2001	Contract Signed	11/20/2001	11/20/2001	H11RIVE	Had meeting to sign contract. Jack is
11/15/2001	2nd Meeting	11/15/2001	11/11/2003	H11RIVE	Finalized plans
11/1/2001	Note	11/1/2001	11/1/2001	H11RIVE	Children: Rob, Mary, and Julie
11/1/2001	1st Meeting	11/1/2001	11/1/2001	H11RIVE	Met with Jack and Jill reviewed poss

HINT: Using the space bar will place a check mark in the check box field. [New Activity Line](#)

[Close Notes](#) [Open Payor Setup Screen](#)

Contacts Management Reports, Letters, Etc.

	FROM	TO	
Contacts	ABCAPPLI	ZURICH	Reset
Setup Date	11/9/2003	5/5/2004	Reset
Type	CUSTOMER	CUSTOMER	Reset
Source	PAYORS TABLE	VENDOR TABLE	Reset

Open Table for Exporting Data to Other Programs

[Print Contacts List](#) [Post a Done Activity](#) [Labels](#)

[Create Letters/Store](#) Bid Letter [Letters](#)

[Create Postcards/Store](#) Open House Party [Postcards](#)

Reports below will be based on selections above, AND on Selections below.

Activity	Meeting	Prepare Contract	Reset
Entry Date	12/1/2002	11/25/2003	Reset
Jobs	0	ZZZZZZZZZZZZ	Reset
User	Joe	Misc	Reset
Priority #	0	99	Reset

[Activities List](#) None [Letter/Letterhead](#)

5/13/2004 [-< To Do List](#) [Labels - 3 Across 1" x 2 5/8 Avery 5160"](#)

[Labels - 2 Across 5 Down \(Avery 5163\)](#)

Send Contacts data to other programs ... like Outlook Express address book!

Design and store Letters and Postcards; send to all selected contacts! Can also select contacts from a check list.

<p>FANTASTIC BUILDERS, INC. Invites You To Join Us</p> <p>OPEN HOUSE PARTY!</p> <p>For: Jack and Jill Brown 11 River Run Road Austin, TX 78704</p> <p>DATE: November 15, 2003</p> <p>RSVP: Carol 512-693-4103</p>	<p>FANTASTIC BUILDERS, INC. 1000 SOMEWHERE DR. Austin, TX 78704 (111) 111-1111</p> <p>Arroyo Printing, Inc. PO Box 416111 Austin, TX 78704-0027</p> <p>Your Logo Here!</p>
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<p><i>Your Logo Here!</i></p> <p>FANTASTIC BUILDERS, INC. 1000 SOMEWHERE DR. Austin, TX 78704 (111) 111-1111</p> <p>11-Nov-03</p> <p>JACK AND JILL BROWN 100 BROADWAY AUSTIN, TX 78704</p> <p>Dear Jack and Jill Brown,</p> <p>Enjoyed meeting with you and discussing your plans to build a new home.</p> <p>At Fantastic Builders, we take your dreams for your home seriously because we realize it is one of the most important undertakings of your life.....</p> <p>You can type whatever you like to be included in your letter. Assign a Letter Title at the top of the screen so that it can be selected by its title.</p> <p>Thank you again, and please feel free to call me with any questions.</p> <p>Sincerely,</p> <p>John Smith, Builder Fantastic Builders, Inc.</p>	<p>FANTASTIC BUILDERS, INC.</p>
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