Enter a New Contact

Entering new Contacts into your database is one of the most basic functions of the software.

Start by opening the Contacts file. Although it can be done in any of several windows, we'll use the Data Record. Go the the Windows menu and choose Enter New Contact, or type Cmd/Ctrl-E. Think of **E** for **E**nter.



A new record is added to the Contacts file and the cursor automatically locates itself in the cell for the Contact name. Type the person's name and then press the Tab key to move on to the Company cell. Enter the Company Name, press Tab to move on to the Address.

For US addresses, before you Tab out of the Address cell, hold down the Opt/Alt key. Then, keeping the key down, press the Tab key to jump over the City and State to the Zip Code. Enter the Zip Code, press Tab and the City and State are entered for you.

And so on...

As you enter data and press the Tab key you are taken from cell to cell until you've accessed them all. Whether you fill each one or not is your choice, the program doesn't demand it. Of course, omitted data may be a headache later when you need to phone or write and a vital piece is missing.

Once you've finished filling in the cells, review some of the options available in the popup menus to help you label and identify the type of entry this Contact represents. For instance, the Category in the upper left identifies the Contacts as a Client, Prospect, Vendor or....whatever. This information helps you find people and groups later.

Three additional windows are available for entering and maintaining other, optional information about each Contact. Click on the Views popup menu, in the upper right corner, to move to the Marketing Profile, Events & Notes or Billing & Shipping. Together with the Data Record these four windows contain all of the information about any one Contact.

The Data Sheet view has other, better purposes than data entry.

