

TRAINING SESSION: 1

Here are some of the key take-away's from the call that you need to be mindful of:

- ✓ Households or Companies must be entered first – Contacts are added to Households or Companies.
- ✓ When adding a Company, Household or Contact, use only the “Add Company” “Add Household” or “Add Contact for” from the Edit drop down menu at the top. Do not use the ones with the words “Lead” in them.
- ✓ Field Entry Protocols
 - Names should be a combination of Upper and Lower case just as you would write it
 - Households with Married/Common-Law families: Spouse & Spouse in the First Name Field ie: Jack & Jill. Remember to use that “&” sign and not the word “and”.
 - Where the spouse has a different last name: First Name Last Name & First Name is what should go in the First Name Field. This is for mail merge purposes so you don't have a bunch of clean up to do each time you want to run a mail merge.
ie: Jack Sparrow & Jill
The 2nd spouse's last name will always go in the Last Name Field (as in the case above, Last Name field would be Jill's last name)
 - Phone numbers should be entered with dots between each of the components and include 1 and area code ie: 1.403.932.4728
- ✓ Household Key Fields include items pertaining to the entire household. (Children from previous marriages should be added under the “Family” Key Field for the specific Contact.
- ✓ Contact Information Key Fields are Client Specific and include F.O.R.M. information that is unique to the individual client.
- ✓ If you log in and go to your Contact List (on the Left Navigation Pane) and all of your contacts have disappeared, DON'T PANIC! Just choose “All Entries” from the View drop down menu at the top.
- ✓ To search for a Contact, use the top right search box and type in the contact's name or portion thereof.
- ✓ To log out of the system, there is an icon at the top right hand corner where it shows your name and is beside the search string. Click on that icon and “Log Out”. Once at the login screen, now is a good time to bookmark this site 😊