Jumsoft

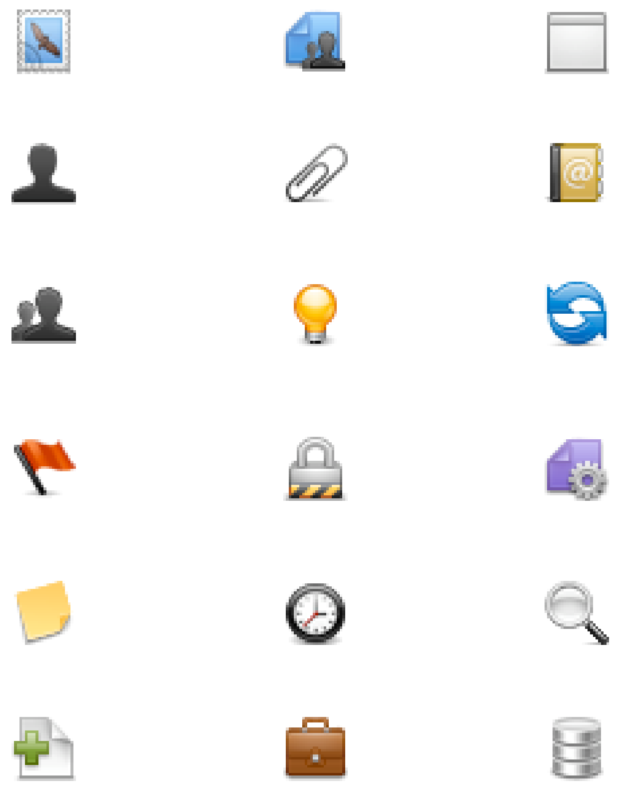
Relationship

Quick Start Guide

About Relationship

About Relationship 1.0
Relationship helps people organize and manage their contact information, titles (roles, i.e., CEO, Manager, Worker, etc.), campaigns and resources quickly and easily. It has all the features required for personal or small business use.

Relationship is perfect for those who don't have much time to learn complex customer relationship management applications. It is an easy-to-use yet powerful application that lets you collect information about your customers, partners and suppliers, organize contacts by groups and Smart Groups, add custom columns or subcolumns to groups, manage events, write and send e-mails, manage campaigns for contacts, manage associations, add attachments and notes to contacts, import tab-delimited files and export v-cards.



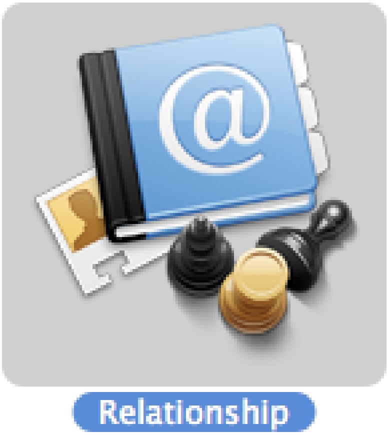
Install and Launch Relationship

Download Relationship
Relationship is a free download at www.jumsoft.com/relationship. If you don't have it yet, go, and get it.

Install Relationship
You don't need to install Relationship. Once downloaded, it will automatically drop the Relationship icon onto your desktop. Move that icon to your Applications folder.

Launch Relationship
If not already open, use the Finder to locate Relationship, and double-click it to launch it.

Relationship Demo
The demo provides you with a fully-functional version of Relationship with which you can experiment and use. Although it includes everything that a licensed copy has, the demo version will expire 15 days after you launch it for the first time.

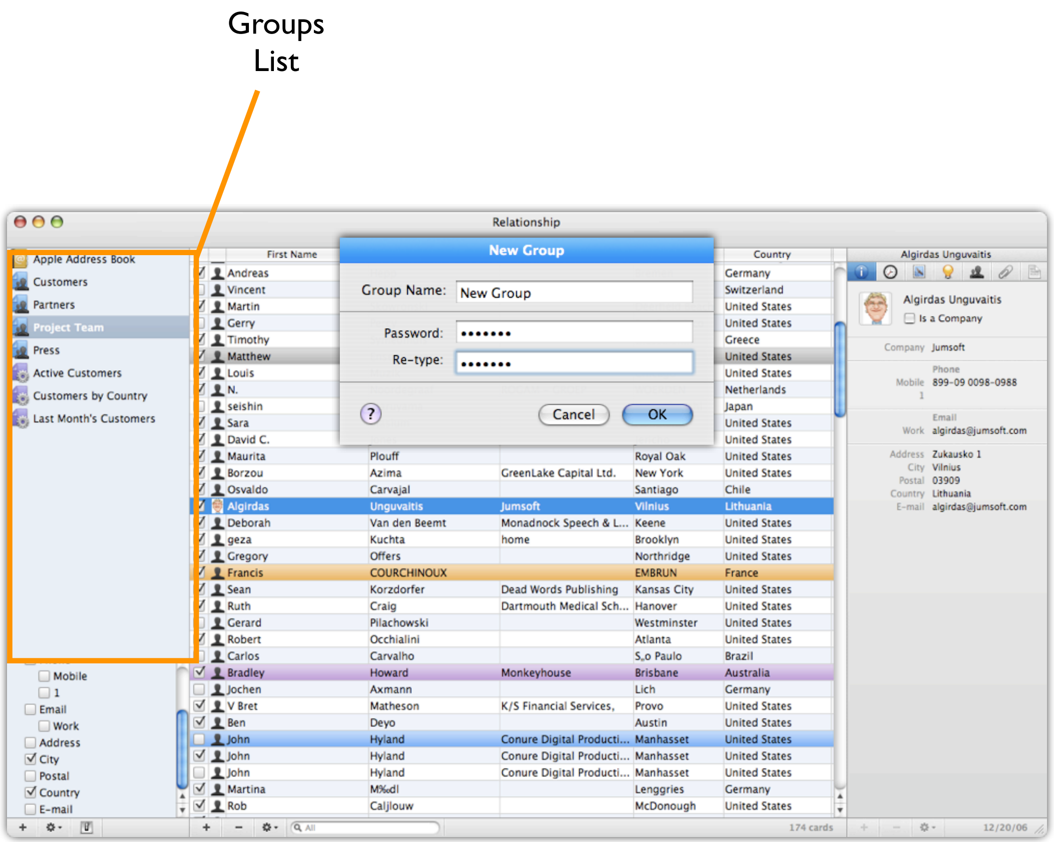


Creating your first Contacts Group

Creating a New Contacts Group
To create a new contacts group, select the File>New Group menu, or click the Add Group button at the bottom of the groups list. A setup sheet will appear. Type a name for your group, and you are done.

When the contacts group has been created, it will appear in the Group List view. You can select it, and start adding your contacts.

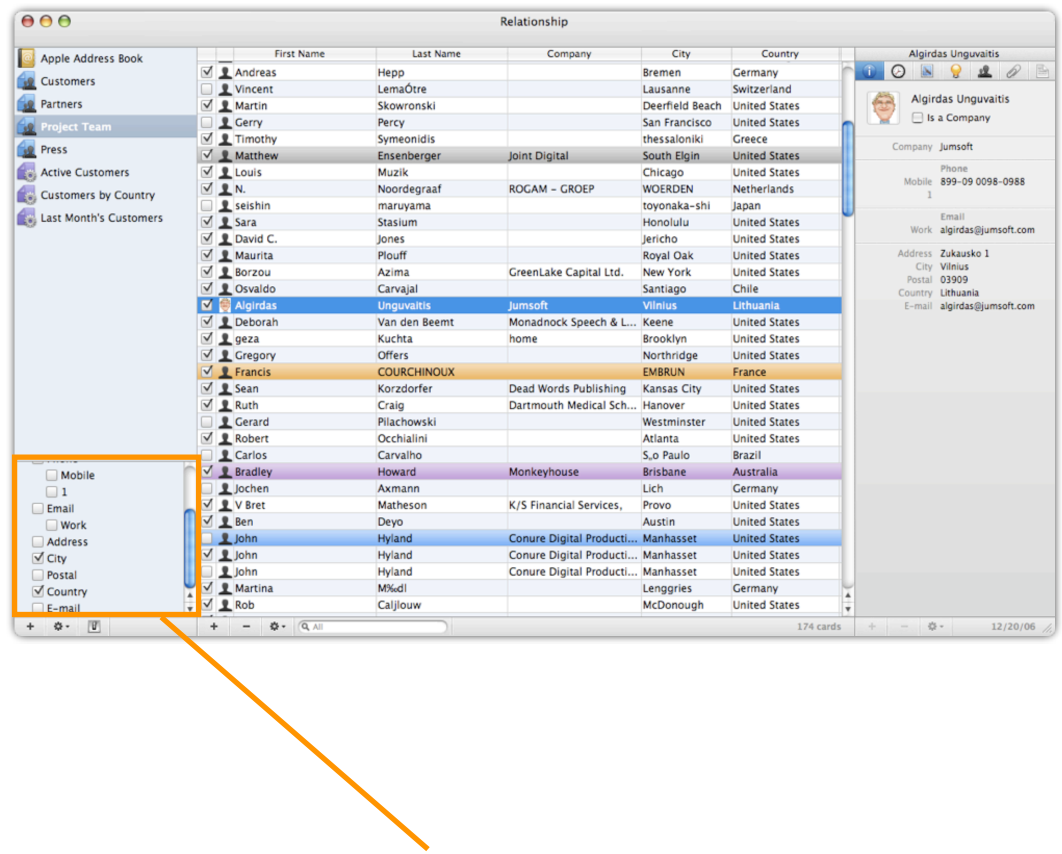
Creating Smart Group
Once you have begun working on a number of groups, you may wish you could organize and access contacts that don't exist in just one group. That's where Smart Group enters the picture. Smart Group allows you to gather and automatically update information from all other accounts based on the criteria you specify. To create a smart group, choose File>New Smart Group. A setup sheet will appear. First, name your group. Second, choose the criterion upon which you want to base the contacts selection, e.g., person or company name, address or purchased product. To use more than one criterion simultaneously, click the "+" button. After all criteria have been designated, click OK, and your new smart group will appear in the Groups list.



Columns in Relationship

Adding more Information to Contacts
You can add custom information about contacts by adding more columns. Relationship provides default columns for your convenience, but you can also add, delete, rename or hide columns by selecting a group and using the Group Action button found at the bottom of the Groups List.

Creating your own column
To create your own customized columns for a group, select the group, and select Add Column from the Group Action button menu. A new column appears. Change it to the name you want, and presto, you have your own column. If you would like to have a more organized list of columns, just add a new column, and choose Add Subcolumn from the Groups Action menu.



Columns

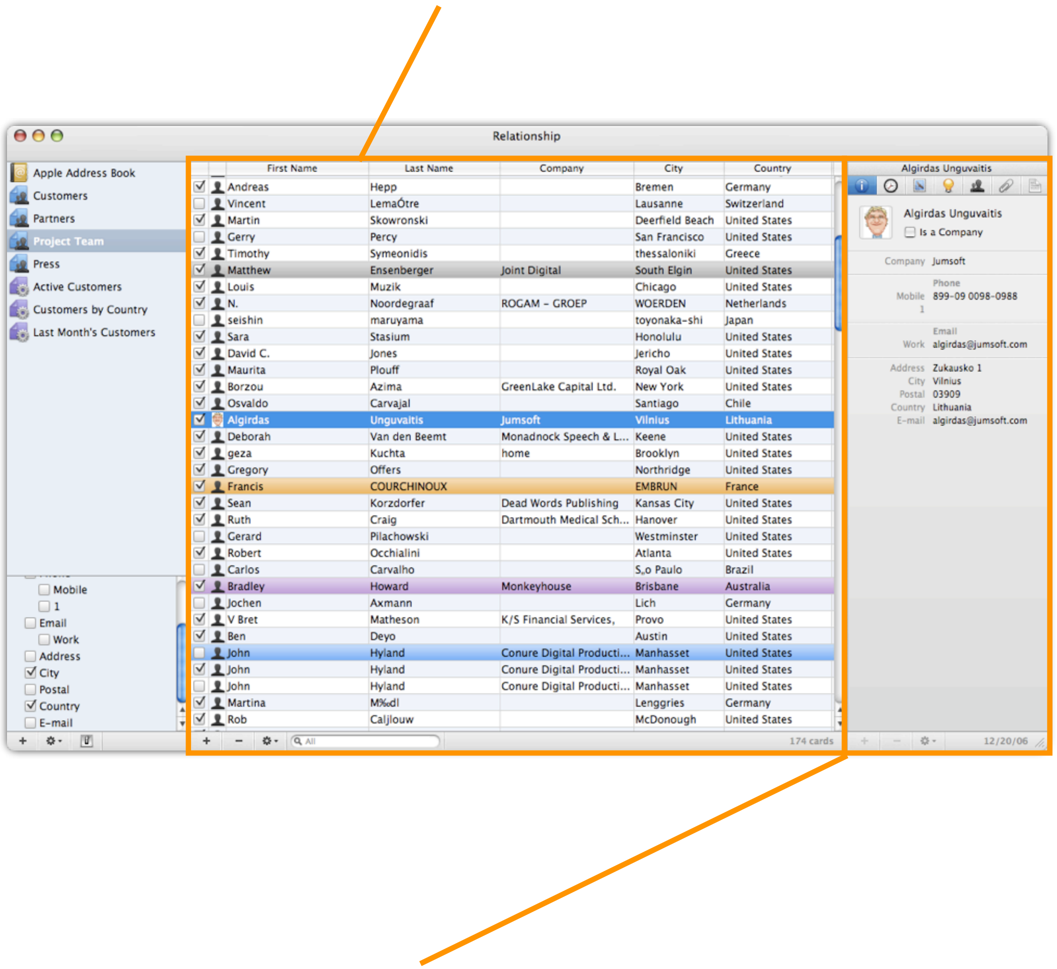
Creating and Editing Contacts

Creating a Contact
Working with contacts is the most important Relationship function.
To add a contact to the contacts list, select the group to which you want to add the contact and either click the Add button in the Relationship contacts list or select Action menu>Add Contact. Set up a contact, and click OK.

To edit the created contact, double-click it in the contacts list, or select Action menu>Edit Contact.

To delete a contact, click the remove button, or select Action menu>Remove Contact.

Contacts

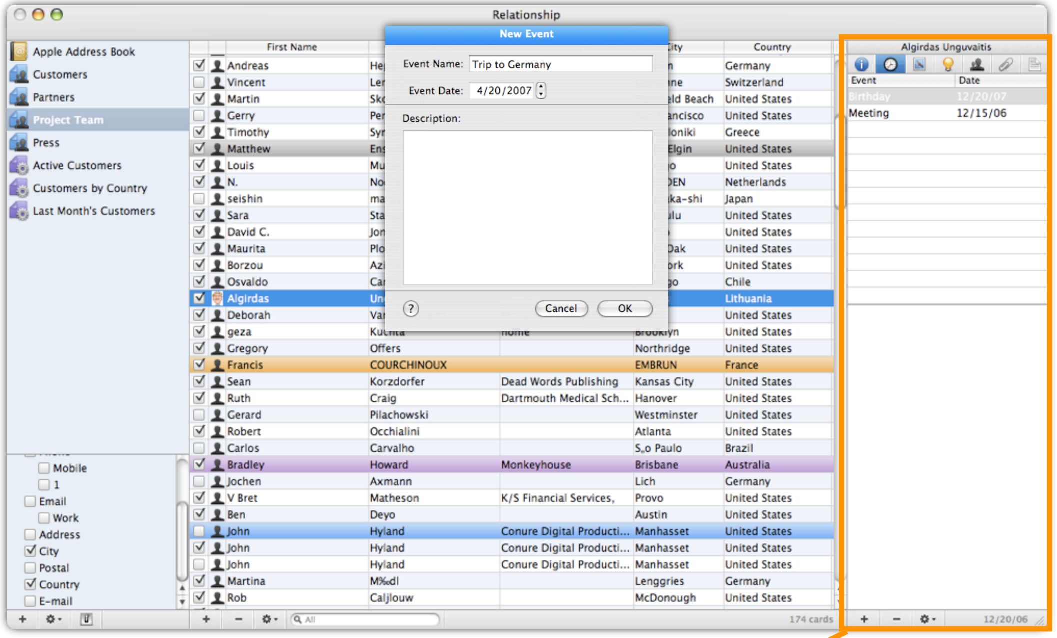


Contact Info

Events in Relationship

Each person or company in your contacts list can have many events.

To add an event for your contact, simply choose the events tab in the info view of Relationship and click Add button at the bottom of that view. Type the name of the event, set up the event date, add description and click OK. The created event now appears in the selected person's Event info view.




Events Tab

Sending E-mails

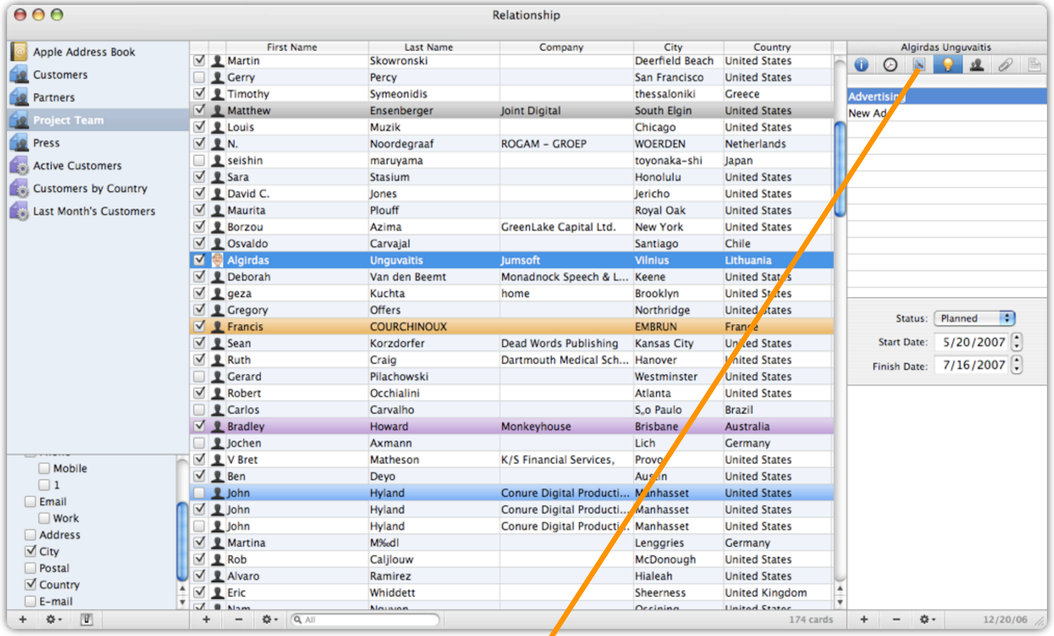
Sending E-mails with Relationship

If you send e-mails using Relationship, sent e-mails are stored in the Relationship database. You can always see what emails were sent to contacts.

Relationship uses Apple Mail to send e-mail. Relationship lets you choose the recipient and type a message.

To send an e-mail to your recipient, select the E-mails tab in the info view of Relationship, and click Add button. A Send E-mail sheet appears. Choose contact's work, home or any other e-mail address. Type the message subject and the message, and click the Send button.

Relationship will launch Apple Mail to send your e-mail.

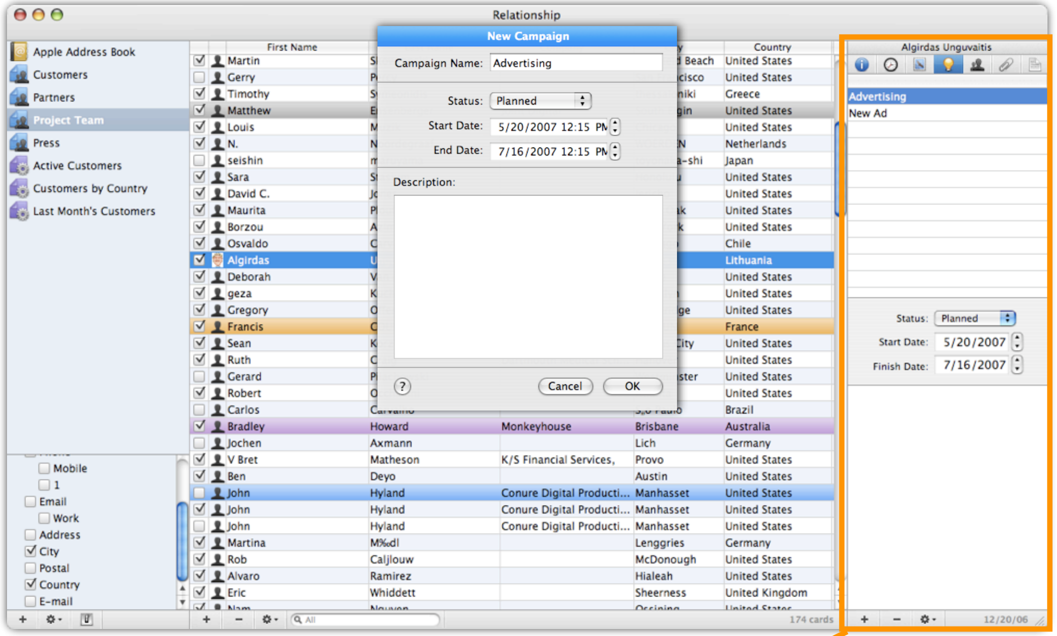


E-mails Tab

Ading Campaigns to Contact

Campaigns in Relationship
You are probably having some marketing campaigns that you would like to attach to your customers.

To add a campaign, select the Campaigns tab in the Relationship info view, and click Add button at the bottom of the view. A New Campaign sheet will appear. Type a name for the campaign, select status, choose start and finish dates, add some notes and click OK. You are done.



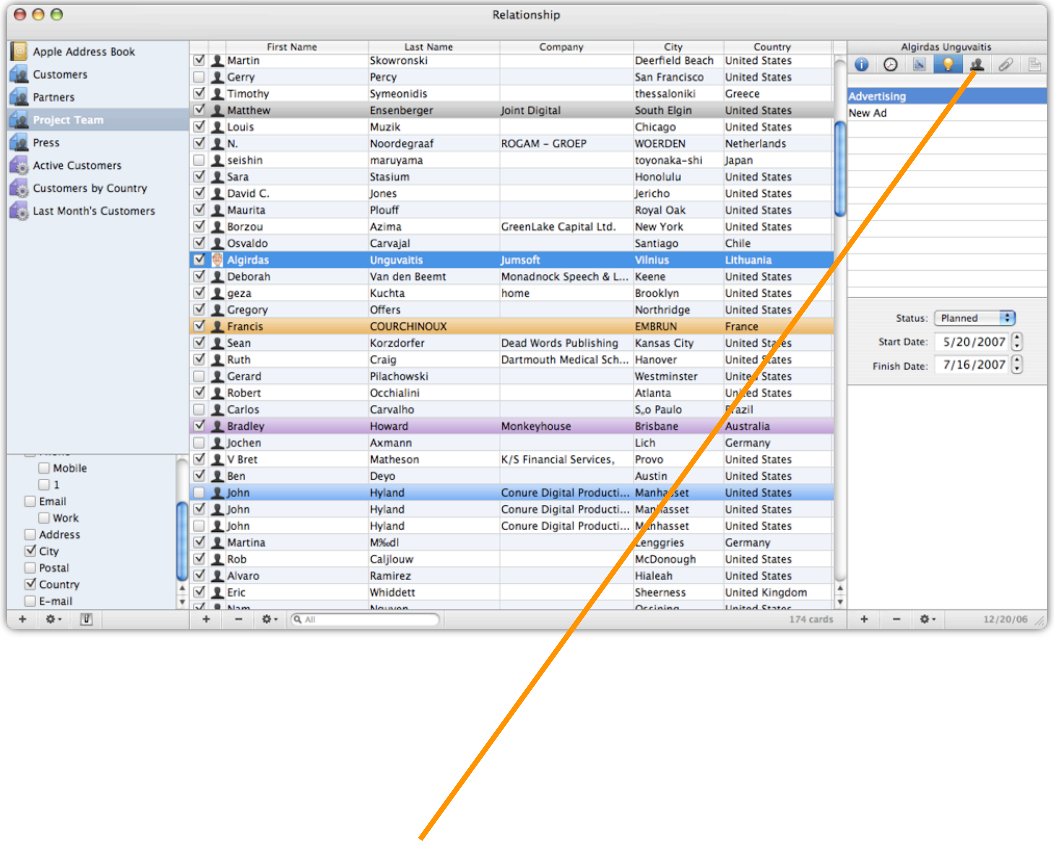
Campaigns Tab

Working with Associations

Working with associations

If you wish to manage contacts' associations with other contacts in your Relationship database, you may do so by selecting the Associations tab in Relationship's info view and click Add button at the bottom of the view.

First, assign the title of the selected contact, for example, 'CEO', and then type a name of any person in your contacts who CEO is assigned to. Add some notes if you wish, and click OK. You are done.



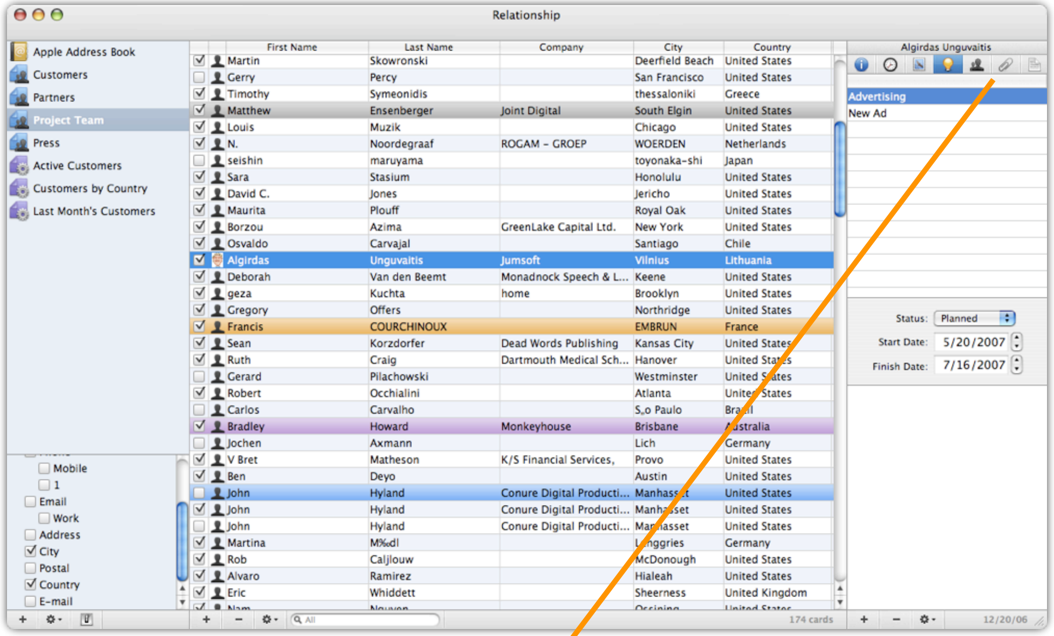
Associations Tab

Attaching files to contacts

Attach file to contact

You can attach any files to contacts in Relationship. Select the contact to which you would like to attach a file. Then select the Attachments tab in the info view, and click Add. An open sheet appears. Select the file on your hard disk, and click OK. The file is now attached to the contact. You can also drag and drop a file onto the Attachments view to attach a file.

When you have some files attached, you can quickly and easily reach them by clicking the arrow near the file's name.



Attachments Tab

Registering your Relationship Application

Please purchase your Relationship license
The purchase of a Relationship license allows you to add and work with an unlimited number of contacts and groups indefinitely, and of course, it enables Jumsoft to continue cooking up great new software feasts for your Mac.

If you already have your serial number, choose License from Relationship, click Enter License button and enter your license code. Click License Now, and you are done. Your Relationship records will be unaffected.

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