Relationship

User's Guide

www.jumsoft.com/relationship

Contents

www.jumsoft.com/relationship

Relationship Features

Jumsoft Relationship is a powerful and easy-to-use and customer relationship management application for Mac OS X. It has all the features that you could need for home or small business CRM needs.

Main Features

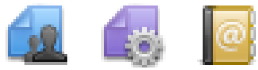
With Relationship you can:

- create Groups for contacts in your company, customers, friends, business partners, and others.
- create Smart Groups for your contacts.
- customize contact information: add or remove custom columns in seconds.
- manage events associated with each contact.
- work with Mac OS X Address Book within Relationship.
- write and send emails.
- add campaigns for every person.
- manage contact associations.
- add any files (attachements to your contact.
- enjoy the CRM with easy-to-use and fun user interface.

Working with Groups and Contacts

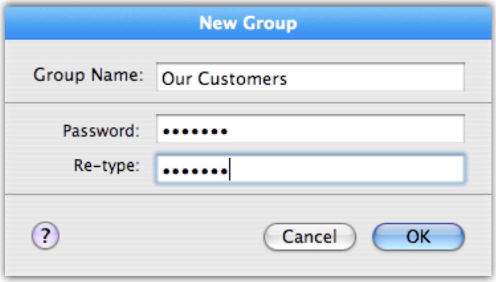
Groups in Relationship

Relationship gives you the option of setting up three types of groups: Group, Smart Group and Mac OS X Address Book.



Creating New Group

To create a simple 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: enter a group name. This name will appear in the Groups list.



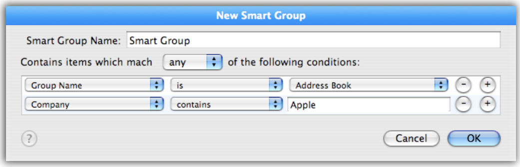
You can use a password to protect your group so nobody else on your Mac is able to view the contacts in your group. Also, you can password protect all your Relationship database. To do that, choose the Relationship>Preferences>Security and click "Set Password" button.

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

Creating Smart Groups

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 groups based on the criteria you specify. To create a smart group, choose File>New Smart Group. A setup sheet will appear:

1. First of all name your Smart Group, e.g. Customers from Europe.



2. Secondly, choose the criterion upon which you want to select the contacts. To use more than one criterion simultaneously, click the "+" button.

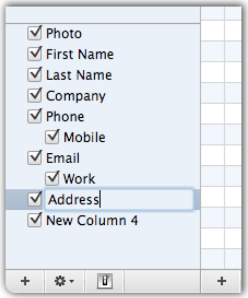
3. After all the criteria have been set, click OK and your new smart group will appear in the Groups list. Anytime you select that smart group you will automatically be shown updated information based on the criteria you are using. To change the criteria of a smart group, select the group and choose Edit Smart Group from the Groups Action menu.

4. Click OK

When the group has been created, it will appear in the Groups List view.

Setting up 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 Groups Action button found at the bottom of the Groups list. Default columns in Relationship include the following:



- Photo
- First Name
- Last Name
- Company
- Phone
- Email

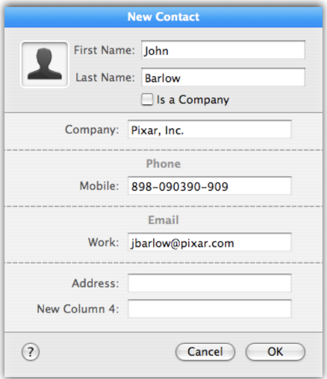
To create your own customized columns for a group, select the group and choose Add Column from Groups Action button. And untitled item appears. Change it to the name you want and presto: You have your own column. If you would like to organize your columns (for example Phone: Mobile, Home, Work), just add a new column and choose Add Subcolumn from the Columns Action menu. A new subcolumn will appear and you can name it whatever you like.

To hide a column, just uncheck the little check box next to it. To delete one, click on the Groups Action button and choose Remove Column.

Working with Contacts

Working with contacts is the most important Relationship function.

To add a contact to the contacts list, select the group you want to add the contact to and either click the Add button in the Relationship contacts list or select Action menu>Add Contact.



The New Contact sheet will appear: type the proper information into the fields that appear. Default fields are First Name, Last Name, Company, Mobile Phone and Work Email.

You may add as many fields as you like. Field are the created by adding custom colums.

To add a photo for contact, simply drag and drop any photo on the photo field in the New Contact sheet.

When fields are filled Click OK and you are done.

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.

Labels

Relationship features a colorful Labels system to make it easier to categorize and work with all the many contacts you may wind up with in any given group.

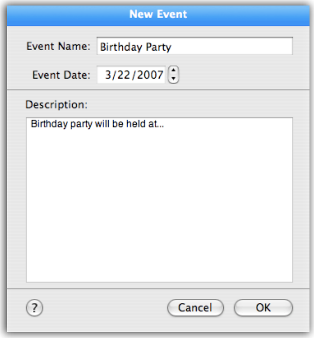
You can attach a label color to any contact. For example, red might indicate a very important contact or group of contacts, while gray signals low significance. To attach a label color just click on the Action button in the contacts list on the bottom toolbar.

To change the names of the colored labels choose Relationship>Preferences>Labels.

Events, Emails, Campaigns, Associations and Attachments

Add Events

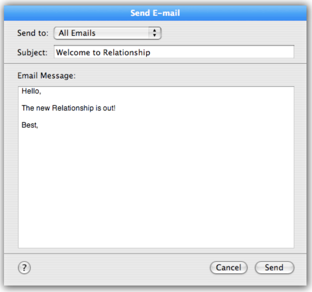
Each person or company in your contacts list can have many events.



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.

Write and Send Emails

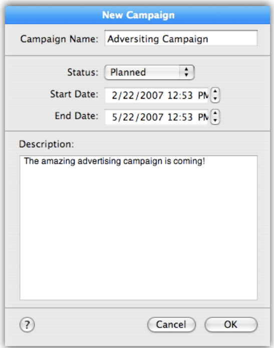
If you send e-mails using Relationship, sent e-mails are stored in the Relationship database. You can always see what emails were sent to contacts. Relationship uses Apple Mail to send e-mail.



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.

Manage Campaigns

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



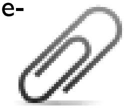
To add a campaign, select the Campaigns tab in the Relationship info view, and click Add button at the bottom of the view. A New Campaign sheet will appear. Type a name for the campaign, select status, choose start and finish dates, add some notes and click OK. You are done.

Manage 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.

Add Attachments



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.

Import and Export

If you are switching from another CRM application, you are never isolated with Relationship. The application is based on standards. Relationship can import tab-delimited files and export vCards.

To import tab-delimited file select File menu>Import.

To export vCard, select File menu>Export.

Relationship Database

If for some reason, you would like to access your Relationship database, it is located at your Home Library>Application Support>Jumsoft>Relationship

When you get a new Mac and wish to move your Relationship database from to the old one to the new one, simply transfer all the Library or copy the Jumsoft folder to your new Mac's Application Support folder in the Home Library.

Software Update

Relationship can check for updates and automatically notify you. Use Preferences>Software Update to turn this function on or off.

Jumsoft

www.jumsoft.com

info@jumsoft.com