Relationship

User Manual

A tutorial for Relationship, a CRM application
for small or home-based businesses

Relationship

User Manual / Table of Contents

Getting Started

Importing and Exporting

Contacts

Security

Contact Us

Overview

Welcome to Relationship! This manual will help you find your way around the Relationship application. Whether you have just downloaded Relationship for the first time and are looking for a way to get started, or you have been using the tool for several years, but still need some expert tips, this guide will help you make the most of what Relationship has to offer and will turn complicated customer relationship management into a straightforward and trouble-free task. First of all, let's begin with a few notes about how to use the Relationship User Manual.

- The Table of Contents page contains a brief overview of the manual's contents, allowing you to browse through the chapter headings and page numbers. Click on the page number to quickly access a desirable topic.
- Use the search function in your PDF viewer to find a specific topic you would like to learn about–e.g., "stickies" or "smart group."
- If you are reading this manual in PDF format, you can use the hyperlink function to quickly jump to another section for more information on the topic. To do so, look for underlined phrases and click on them.

Minimum System Requirements

- Mac OS X 10.5 Leopard or later
- 512 MB of RAM
- 22 MB of hard drive space

Note: You must purchase Mac OS X 10.5 Leopard if you are upgrading from an earlier version.

Updating Mac OS X 10.5 to the latest version

1. Choose Apple menu > Software Update. A dialog box appears, listing new or updated software available for your computer.
2. Follow the onscreen instructions to update Mac OS X to the latest version.

Installation and Help

Installing Relationship

1. Download the Relationship application from our Web site: http://www.jumsoft.com/relationship/.
2. Once the download is completed, move the Relationship icon from the Downloads folder to the Applications folder.
3. Open your Applications folder and drag the Relationship icon onto your Dock to keep it there for easy access.
4. Click the Relationship icon on your Dock to launch the software.
5. The Welcome Screen appears. Choose the relevant method to open the application:
   - Open the Sample Data File: Opens the sample file, which automatically becomes your current data file and can be used as a starting point for your permanent database.
   - Open an Existing File: Opens the data file from the earlier version of Relationship (provided you have used the earlier version).
   - Start from Scratch: Opens an empty file. You can open the Welcome Screen anytime by selecting Help > Welcome Screen in case you want to remove your current data and start from scratch.

Note: If you are trying to transfer your old database from Relationship 1, you have to choose "Open an Existing File."

Help documentation

- Quick Start Guide: Click this option to download a short introductory tutorial from our Web site. This guide is a great starting point for novice Relationship users; it introduces you to some key terms and the basic features of the application.
- Relationship Help: Click this option to open Relationship Help, the built-in documentation for the application. Search for answers to your questions or browse through the different categories for information on every detail of the software. If you prefer a printable version of the documentation, you can download the Relationship User Manual in PDF format from our Web site: http://www.jumsoft.com/relationship/.

Registration Info

Each time you launch Relationship in trial mode, you will be encouraged to purchase the full version. Purchasing the Relationship 2 license allows you to add and work with an unlimited number of contacts and projects and, of course, enables Jumsoft to continue creating great new software for your Mac. If you decide to purchase one or more copies, simply visit our Web store at *www.jumsoft.com/store* or select Relationship > License and click on Buy Relationship.

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

Note: A license code is the equivalent of a serial number.

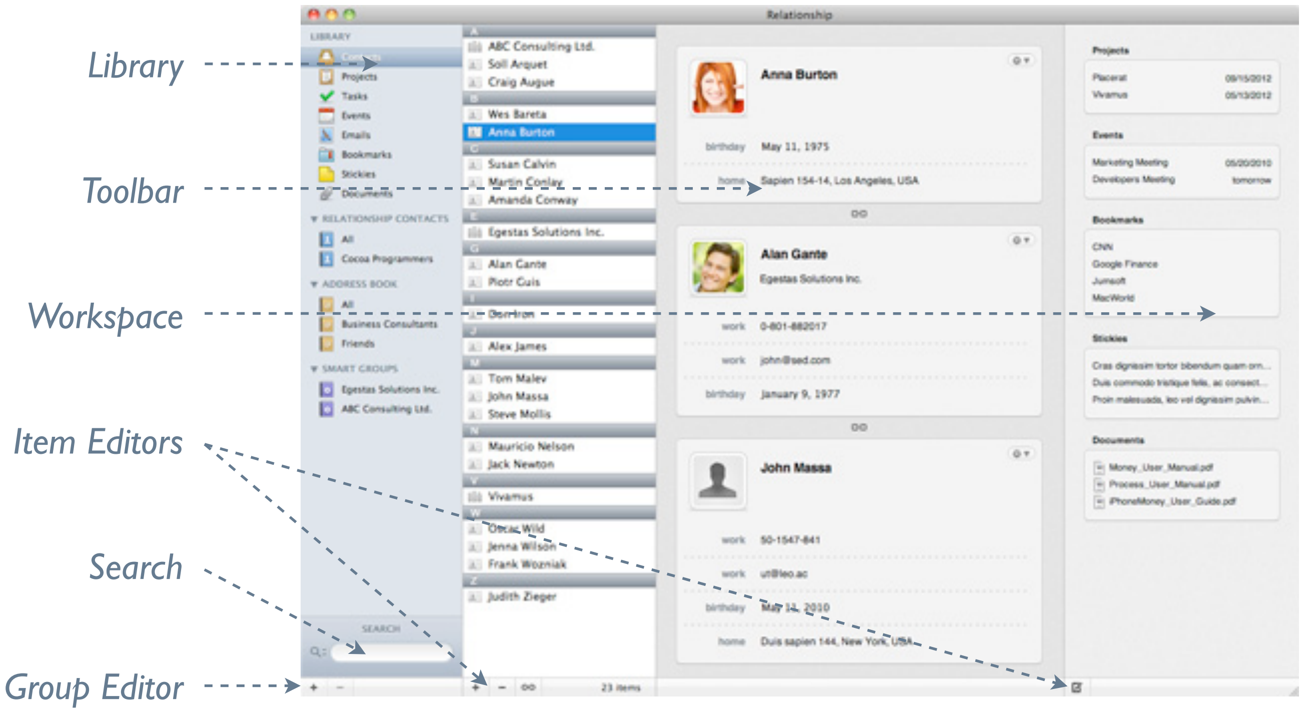
Interface

There are several functions of Relationship that you will be using on a regular basis. They add up to the interface with which you will become most familiar.

Icon	Function	Description
	Contacts	Displays a list of all your Relationship/Address Book contacts and their details; also, allows for adding, editing, removing them, or linking them to other functions, e.g. projects, events, etc.
	Projects	Allows you to add, edit, and view projects.
	Tasks	Allows you to add, edit, and view tasks.
	Events	Allows you to add, edit, and view events.
	Emails	Allows sending and receiving email messages directly in Relationship; stands for the Inbox where the messages are displayed.
	Bookmarks	Allows adding bookmarks of your key Web sites and viewing them directly.
	Stickies	Allows you to add, edit, and view sticky notes.
	Documents	Allows you to add documents from your hard drive and arrange them on various shelves.
	Address Book Group	Displays a list of Address Book contacts grouped together according to your chosen criteria.
	Relationship Group	Displays a list of Relationship contacts grouped together according to your chosen criteria.
	Smart Group	Allows you to gather and automatically update information from all other groups based on the criteria you specify.
	Private Contact	Indicates contact details for an individual.
	Company Contact	Indicates contact details for a company or organization.

Icon	Function	Description
	Project Notes	Allows you to add notes to projects.
	Drafts	Displays draft email messages.
	Sent	Displays sent email messages.
	Trash	Displays deleted email messages.
	RSS	Displays RSS feeds entries.
	Get Mail	Downloads new email messages.
	New Message	Starts a new email message.
	Reply	Allows replying to an email message.
	Reply to All	Allows replying to all contacts related to an email message.
	Forward	Allows forwarding an email message.
	Delete	Removes a selected email message.
	Flag	Marks a selected email message with a flag symbol.
	Back	Shows the previous page of a Web site.
	Next	Shows the next page of a Web site.
	Email	Shows the home Web site, provided you have indicated it.
	Refresh	Reloads the current Web page.
	Add Bookmark	Adds the current Web site to your bookmark list.
	All Bookmarks	Shows/hides your bookmark list.

Main Window



Library

- Displays lists of all main tools found in Relationship:
    - Contacts: Contains a list of all your contacts as well as their details and related items.
    - Projects: Displays a list of all your projects as well as their details and related items.
    - Tasks: Contains a list of all your tasks.
    - Events: Shows your event calendar.
    - Emails: Allows integrating your email accounts into Relationship.
    - Bookmarks: Contains a list of your bookmarks.
    - Stickies: Displays a wall of sticky notes.
    - Documents: Stores various documents from your hard drive, arranged on shelves.
    - Contact group lists:
        - Address Books contacts
        - Relationship contacts
        - Smart groups
- To show or hide the group lists, click the disclosure triangles.
- To open an item in the Workspace, click on the item in the Library.

Workspace

Displays a list of contacts, a project, the sticky wall, the browser window, etc., depending on the Relationship function selected.

Toolbar

Displays a list of tools depending the Relationship function selected: contact linking, project list, bookmark list, mailboxes, etc.

Item Editors

Depending on the Relationship function selected, allows adding, removing, editing, or sorting various items: contacts, projects, events, etc.

Search

Allows searching by keywords within all sections of Relationship.

Group Editor

Allows adding or removing a new Address Book, Relationship, or smart contact group.

Relationship Menu

Menu name	Action	Keyboard Shortcut
About Relationship	Displays the basic information about Relationship and a link for further information.	
Preferences	Allows modifying various preferences: general, template, backup, update, security, users, email accounts, and signatures.	⌘,
Check for Updates	Searches for available updates and displays them.	
License	Allows entering the license code after purchasing the application.	
Services	Displays a list of various applications and features: e.g., Mail, Skype, TextEdit, etc.	
Hide Relationship	Hides Relationship.	⌘H
Hide Others	Hides all open applications except Relationship.	⌥⌘H
Show All	Shows all open applications.	
Quit Relationship	Closes Relationship.	⌘Q

File Menu

Menu name	Action	Keyboard Shortcut
Save	Saves any unsaved changes.	⌘S
Import	Imports data from a file on your hard drive.	
Export	Exports data to a file on your hard drive.	
Backup to MobileMe	Performs data backup to your MobileMe account.	
Revert from MobileMe	Loads data from a backup file on your MobileMe account.	

Edit Menu

Menu name	Action	Keyboard Shortcut
Undo	Reverses the effect of the last action made. Choose Undo repeatedly to step back through all changes made.	⌘**Z**
Redo	Brings the undone action back. Choose Redo repeatedly to redo all recent Undos until the Undo list is empty.	⇧⌘**Z**
Cut	Removes the current selection and inserts it in the Clipboard.	⌘**X**
Copy	Makes a copy of the current selection for the Clipboard.	⌘**C**
Paste	Inserts the contents of the Clipboard at the insertion point.	⌘**V**
Delete	Deletes the current selection from your document.	
Select All	Selects all entries in the Workspace.	⌘**A**
Find	Allows finding and replacing text in selected entry box.	
Spelling	Opens the spelling and grammar window.	
Special Characters	Opens the special characters window.	⌥⌘**T**

Font Menu

Menu name	Action	Keyboard Shortcut
Show Fonts	Opens the Fonts window.	⌘T
Bold	Makes selected text bold.	⌘B
Italic	Makes selected text italic.	⌘I
Underline	Underlines selected text.	⌘U
Bigger	Increases the font size of selected text.	⌘+
Smaller	Reduces the font size of selected text.	⌘-
Kern	Adjusts white spacing in a proportional font.	
Ligature	Allows joining two symbols into a single element.	
Baseline	Allows creating subscript and superscript characters.	
Show Colors	Opens the Colors window.	⇧⌘C
Copy Style	Copies the font style of selected text.	⌥⌘C
Paste Style	Applies a copied font style to selected text.	⌥⌘V

Action Menu

Menu name	Action	Keyboard Shortcut
Add Item	Varies depending on the item selected in the Library. For example, in the Projects list, this menu item will create a new project.	⌘N
Add Relationship Group	Creates a new group of Relationship contacts.	⌥⌘R
Add Address Book Group	Creates a new group of Address Book contacts.	⌥⌘A
Add Smart Group	Creates a new smart group of contacts.	⌥⌘S
Add Contact	Allows creating a new contact.	⇧⌘N
Add Project	Allows creating a new project.	⇧⌘P
Add Task	Allows creating a new task.	⇧⌘T
Add Event	Allows creating a new event.	⇧⌘E
Add Bookmark	Allows creating a new bookmark.	⇧⌘B
Add Sticky	Allows creating a new sticky note.	⇧⌘S
Add Documents	Allows adding a new document from your hard drive.	⇧⌘D
Write Email	Allows writing and sending an email message directly in Relationship.	⇧⌘W

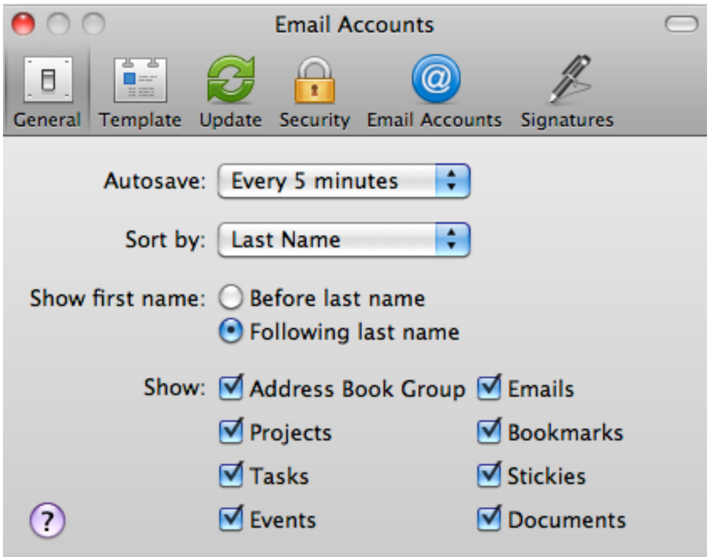
Window Menu

Menu name	Action	Keyboard Shortcut
Minimize	Minimizes the Relationship window.	⌘**M**
Zoom	Increases the Relationship window to the maximum.	
Bring All to Front	Brings all Relationship windows on top of other applications' windows.	
Relationship	When checked, puts the main Relationship window on top of other windows, e.g., Preferences.	

Help Menu

Menu name	Action	Keyboard Shortcut
Search	Provides a shortcut to any action in Relationship. Type a keyword for the action you are looking for, and Search will list all relevant actions.	
Relationship Help	Opens Relationship Help.	
Quick Start Guide	Opens Relationship Quick Start Guide.	
Relationship User Guide	Opens Relationship User Guide.	
License Agreement	Displays the license agreement for Relationship.	
Release Notes	Lists new features for the current and previous versions of Relationship.	
Send Feedback	Opens a blank email to *info@jumsoft.com*.	
Welcome Screen	Opens the Welcome Screen.	

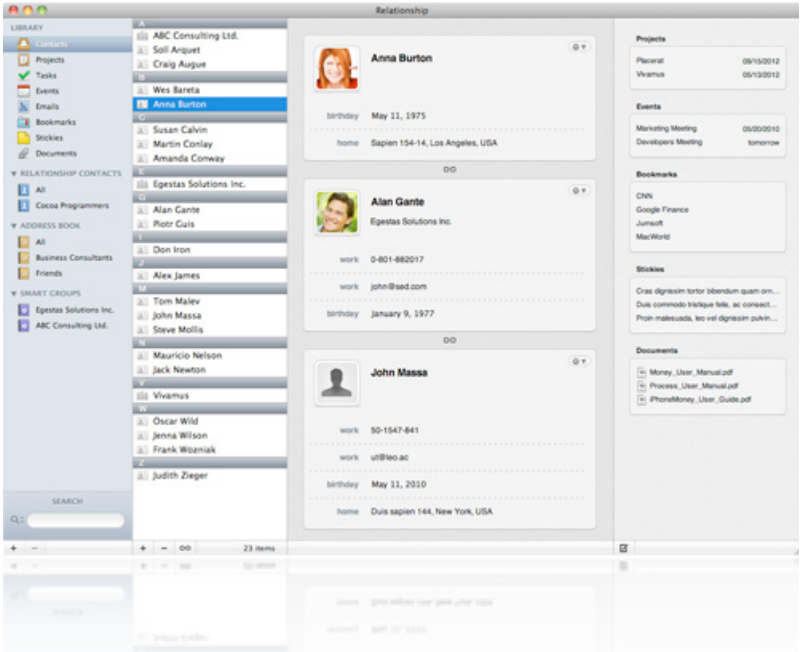
Preferences



The Preferences sheet can be found by selecting Relationship > Preferences. It contains six sections:

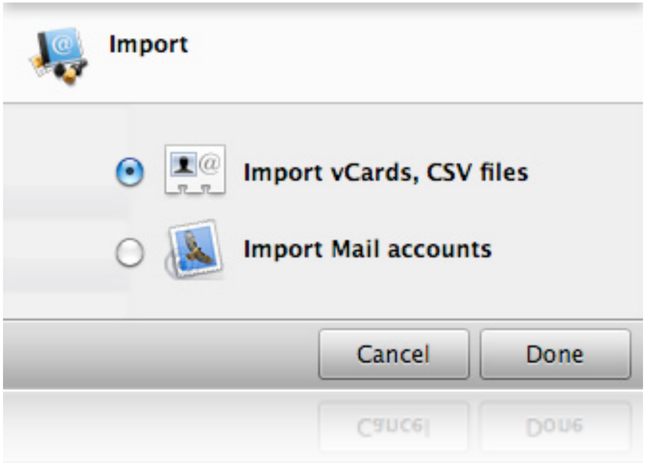
- General. You can specify the contact sorting and autosaving preferences as well as the items to be displayed in the Library.
- Template. This section allows you to set the default fields to be displayed in contact windows–e.g. phone, email, birthday, etc. You can also create your own custom fields here.
- Update. This section allows checking for updates or setting Relationship to check automatically each time the application is started.
- Security. Set a password to secure your Relationship database. Every time you start Relationship, you will be asked to enter the password.
- Email Accounts. Enter one or more email accounts to integrate them with Relationship. Also, choose how frequently Relationship should check for new messages.
- Signatures. Allows you to set the signatures to be used with your email accounts.

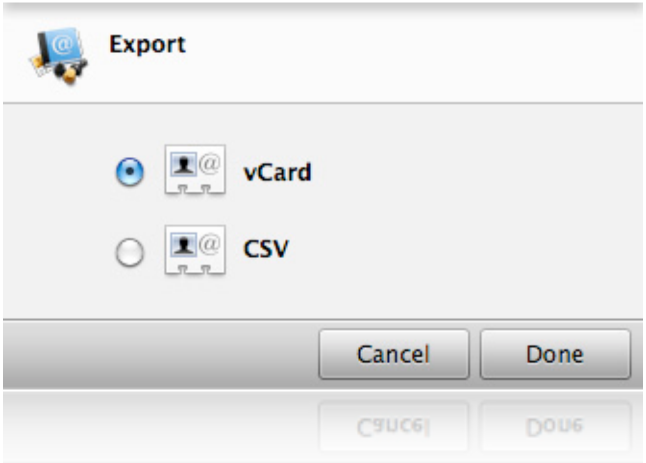
Linking



Linking is the process of connecting the elements of Relationship for keeping related data together. By linking your contacts and projects to various objects in your database, you can record past and current information and view it in one place. Linking is the glue that holds all your information together and maintains a frame of reference within your random bits of data.

Formats





If you are switching from another CRM application, you are never isolated with Relationship. The application is based on standards, and it supports vCard and CSV data files, allowing you to import your contact data from other applications. It also offers the possibility of importing your accounts from Apple Mail. Relationship files can be exported to vCard and CSV.

vCard

vCard is a file format standard for electronic business cards, supported by many personal information management applications. Relationship supports this format for both import and export.

Comma-Separated Values (CSV)

Personal information managers may make your data available in a common text format, CSV. The format separates data into fields representing a bit of information about each contact, such as an address or a phone number. The order of the fields should be consistent throughout the file. These files can be viewed and edited in Numbers and Microsoft Excel.

Mail Accounts

Relationship can quickly import your accounts and emails from Apple Mail. Note that syncing with other email clients is performed via Preferences > Email.

Procedures

Importing vCards or CSV files from your hard drive

1. Select File > Import > Import vCards, CSV files.
2. Choose a data file on your computer.
3. Select an existing contact group to add the new contacts to, or create a new one.
4. Click Open.

Importing accounts from Apple Mail

1. Select File > Import > Import Mail Accounts.
2. If you have only one account within Apple Mail, leave its box checked. If you have more than one, you may choose to uncheck some of them.
3. You can choose not to import previously received email messages to Relationship by checking the "Do not include emails" box.
4. Click Done.

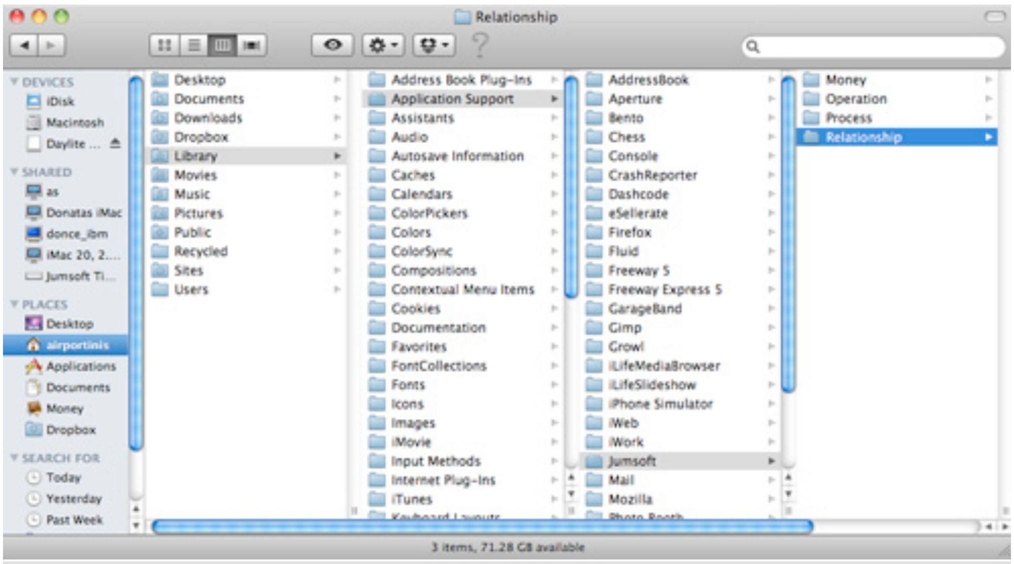
Note: The "Do not include emails" option does not fully work if you use the IMAP protocol for your email account. With IMAP, your existing messages will eventually be loaded to Relationship anyway. However, they will be downloaded from a server rather than imported, which will take a lot more time than a simple import procedure.

Exporting data to vCards or CSV

1. In the Library, select a contact group to be exported. You can also select a number of specific contacts to be exported, as opposed to the whole group.
2. Select File > Export.
3. Select the file format.
4. Choose a location on your computer.
5. Click Export.

Note: Exported data is not the same as a data backup. To restore Relationship to a particular moment in time, you need to have performed an account backup and to follow the backup with an account revert.

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 the old one to the new one, simply transfer the entire Library or copy the Jumsoft folder to the Application Support folder in the Home Library of your new Mac.

Contacts Overview

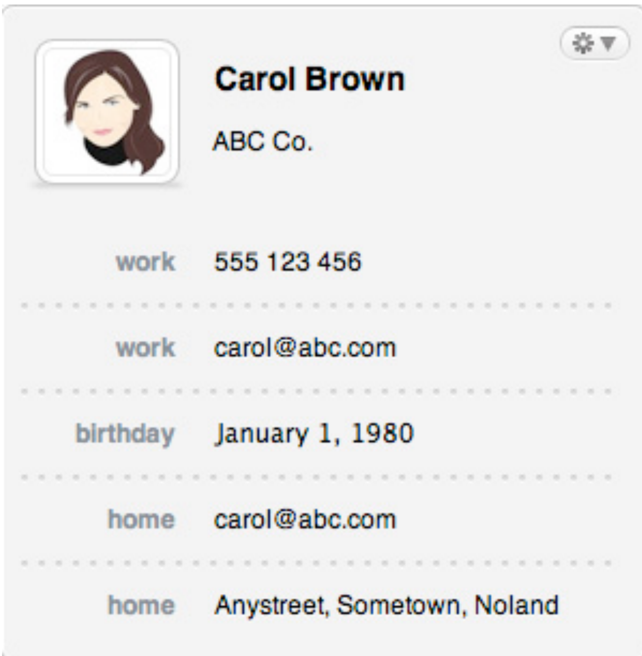
A contact in Relationship represents an individual or an organization. It may be someone you know personally, a customer, or a partner-company. All information concerning the contact (such as date of birth, middle name, phone number, email address, etc.) is stored in a contact record.

Contacts can be linked to virtually any other Relationship object, such as projects that the contacts may be involved in, tasks you may have to perform for the contacts, events they may take part in, emails you have exchanged, and various references in the form of bookmarks, documents, and stickies.

You can classify contacts into groups, which are in turn divided into Address Book and Relationship contacts, allowing you to sync the two applications while retaining the borderline between the separate contact sets. You can use groups to organize large numbers of contacts or to send bulk mail out to a bundle of individual or company contacts as part of a marketing campaign.

There is another type of contact group called Smart Group. It allows you to gather and automatically update information from all other groups based on the criteria you specify.

The full list of your contacts is kept at the very top of the Library, while contact groups can be found at the bottom of Library. You can either keep the groups hidden under the "Address Book," "Relationship," and "Smart Groups" names or press the disclosure triangles to see the full lists.



New Contact

Opening the Add Contact sheet

- Select Action > Add Contact.
- Move your cursor to the Contacts section of the Library, and click the "+" button that has appeared.
- Select Contacts in the Library, and click the "+" button in the left Item Editor.

Adding Contact options

Click on a respective field to edit it. Click the "+" or "-" buttons to add or remove items. You can specify some options to be displayed in Preferences > Template.

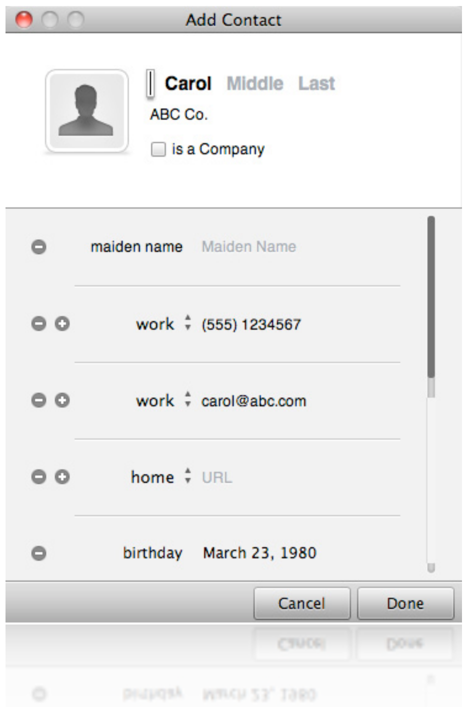
- Name. Select in Preferences whether to display a title and a middle name.
- Company.
- Maiden name.
- Phone (work, home, mobile, main, home fax, work fax, pager, other).
- Email (work, home, other).
- URL (home, home page, work, other).
- Birthday.
- Dates (anniversary).
- Related names (father, mother, parent, brother, sister, child, friend, spouse, partner, assistant, manager, other).
- Instant messaging: AIM, ICQ, MSN, Jabber, Yahoo (home, work, other).
- Address: street, city, state, ZIP, country (home, work, other).
- Notes

When editing the Add Contact options, you can indicate whether the contact is a company.

Adding a contact portrait

- Drag an image file from Finder onto the portrait field.
- Click on the portrait field. Then select a file from recent pictures, take your own snapshot, or open your hard drive to select an image file.
- To remove a portrait, right-click on the image.

When you are finished editing the contact details, click Done. After the contact is created, it appears in the Contacts section of the Library. To edit a contact, double-click on it. To view items linked to a contact, add new ones, or remove unwanted links, click the List button in the right Item Editor.



Linking Contacts

Opening the Linking sheet

- Select a contact, and click on the Link icon in the left Item Editor.
- Select a contact, click on the List button in the right Item Editor, and click on the "+" button next to an appropriate item type.
- Select a contact, click on the Gear icon on the contact card, and select Link.

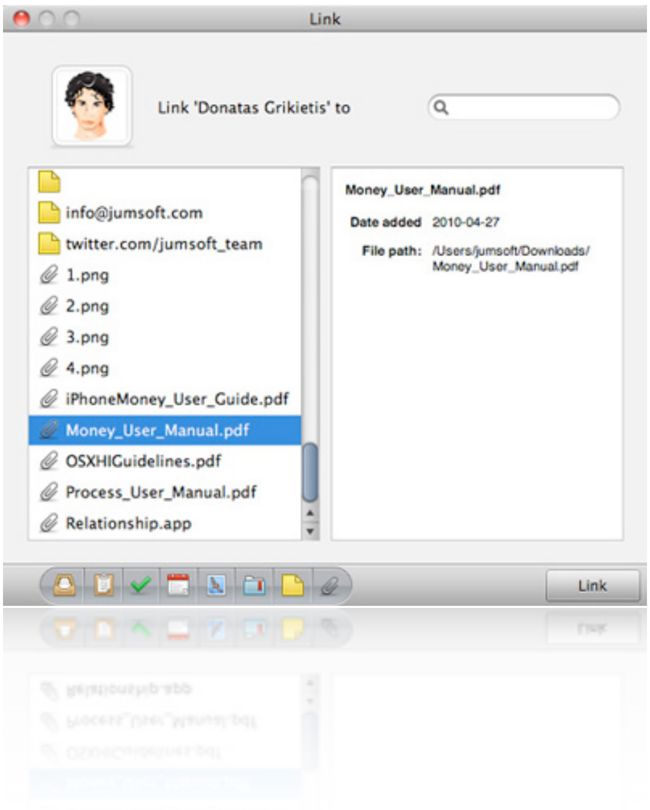
Linking a contact

1. Open the Linking sheet.
2. In the bottom bar, select one or more appropriate item types: projects, tasks, etc.
3. Select relevant items in the left pane; hold the Cmd button to select more than one item.
4. When you are finished choosing items for linking, click Link.

Unlinking an item

- To unlink other contact, click on the Gear icon on its pane, and select Unlink.
- To unlink any other item, click on the List button in the right Item Editor to open the Linking sheet, and select "-" for the item you want to unlink.

After you link a contact to a number of items, the contact window will contain references to these items with the possibility of clicking on them for viewing or editing. All linked items except for other contacts are displayed in the Toolbar (it can be opened by clicking on the "+" button in the right Item Editor). Linked contacts are displayed separately, on the right-hand side of the Workspace, and can be edited, linked further, or unlinked by clicking a gear symbol at the top-right corner of their cards.



Contact Groups

A group is a collection of individual and/or company contacts that have something in common, as defined by you. You can use groups to organize large numbers of contacts or send bulk mail-outs to a bunch of contacts as part of a marketing campaign.

All groups are divided into Address Book and Relationship contacts, allowing you to sync the two applications while retaining the borderline between the separate contact sets.

Creating a group

1. Select Action > Add Address Book/ Relationship Group, or click the "+" button in the Group Editor and select New Address Book/Relationship Group.
2. Enter a group name, which will appear in the Groups list.

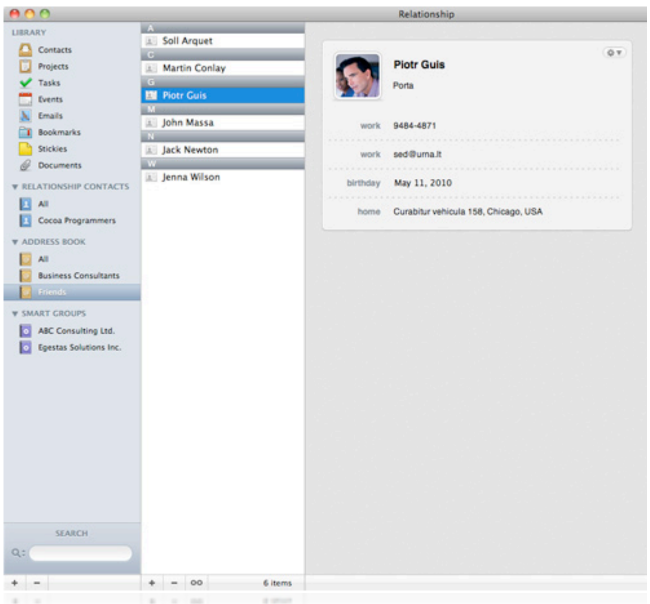
After the group has been created, it appears under the Address Book or Relationship headings in Library. You can show/hide the group lists by clicking on the disclosure triangles next to them.

Managing a group

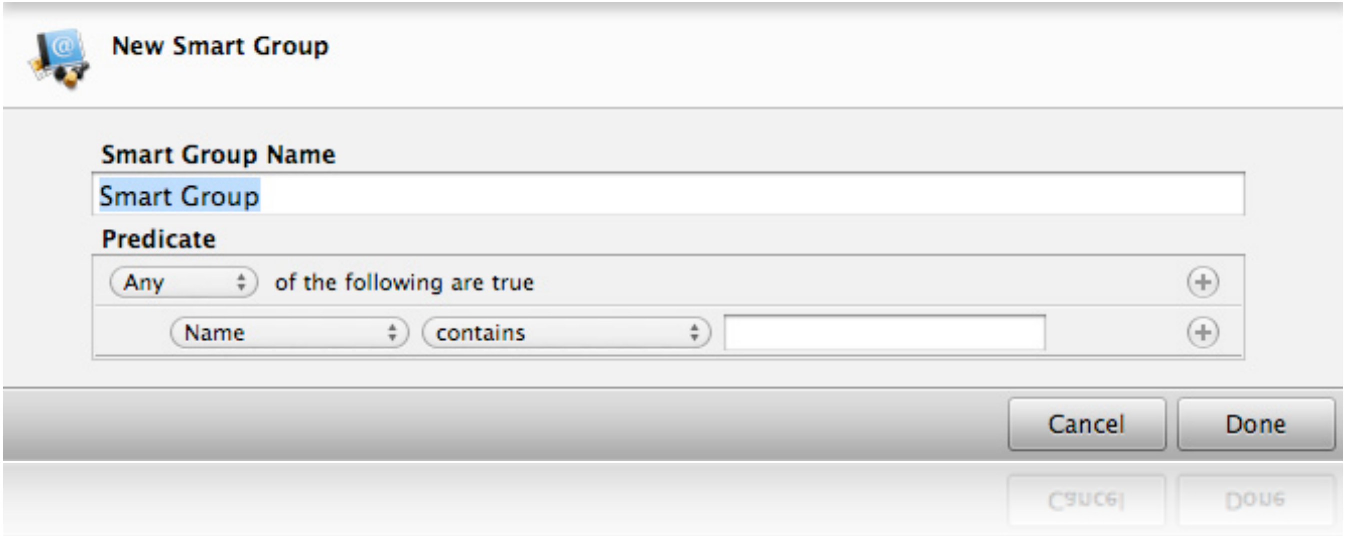
- To add a contact:
  1. Select the group.
  2. Click the "+" button that has appeared next to its name.

or

  1. Select Contacts.
  2. Drag a selected contact to the group name in the Groups list.
- To remove a contact:
  1. Select the group.
  2. Right-click on the contact.
  3. Choose Delete Contact. The contact will remain in the general Contacts list.



Smart Groups



When working with a number of different contact groups, you may wish to organize and access contacts that exist in more than one group. Smart Group allows you to gather and automatically update information from all other groups based on the criteria you specify.

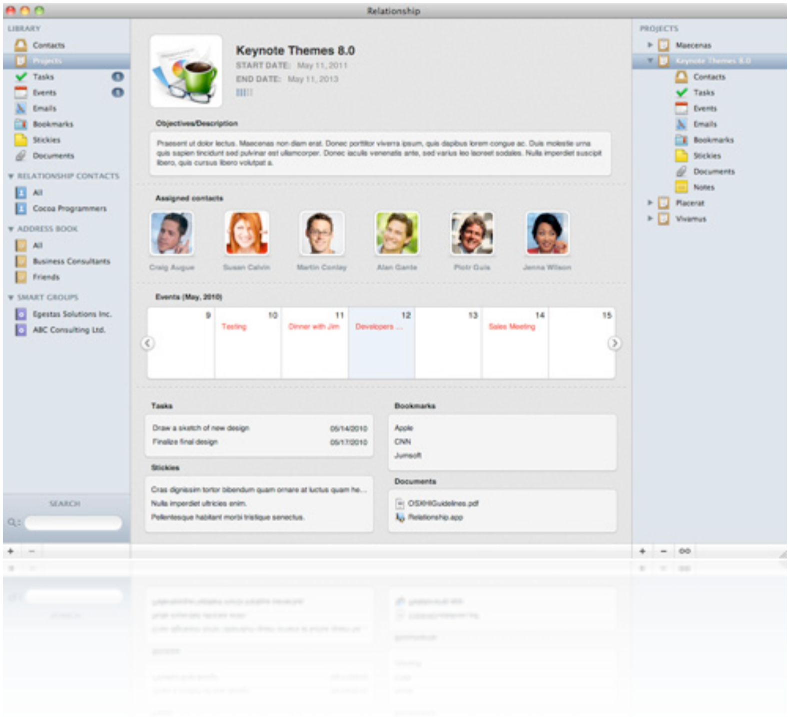
Creating a Smart Group

1. Select Action > Add Smart Group, or click the "+" button in the Group Editor and select New Smart Group.
2. Choose a name for the group.
3. Choose the criterion upon which contacts should be selected. To use more than one criterion, click the "+" button. The selection of criteria is presented in the following way:

"Any/All" of the following are true:
"Name/First Name/Last Name/Company/Email" "contains/begins with/ends with/is/is not" [field to enter a keyword]

Any time you select the Smart Group, you will automatically be shown updated information based on the criteria you have chosen. To change the criteria of a Smart Group, right-click on its name in the Library and select Edit Group.

Projects Overview



Projects are a powerful tool for managing your business; they allow you to plan, organize, and follow relevant information that aids in sorting out multi-step objectives for individuals or teams.

A project contains fields that record the start date, due date, priority, and objectives of the project. You can also see an event timeline and linked contacts, tasks, documents, notes, etc. in the Workspace upon selecting a project.

New Project

Adding a project

1. Move your cursor to Projects in the Library and click the "+" that has appeared, or select Projects and click the "+" button in the right Item Editor.
2. Enter the project information in the Add Project sheet:
   - Project Name
   - Start Date (optional)
   - Due Date (optional)
   - Priority: 0 for lowest and 5 for highest priority
   - Objectives
3. Click Done to save the project. It will be displayed in the Project list in the Toolbar.

Managing a project

- Click the disclosure triangle next to the project name in Toolbar to view linked items–e.g., tasks and documents.
- To add important details and comments, select Notes within the project.

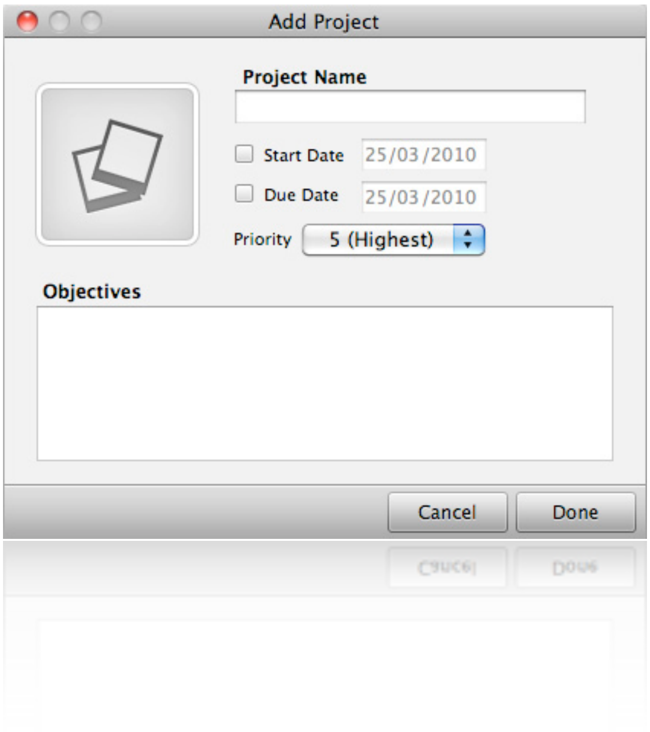
Linking a project

1. Select a project and click the Link button in the right Item Editor.
2. In the Linking window that has appeared, select one or more appropriate item types: contacts, tasks, etc.
3. Select relevant items in the left pane; hold the Cmd button to select more than one item.
4. When you are finished choosing items for linking, click Link.

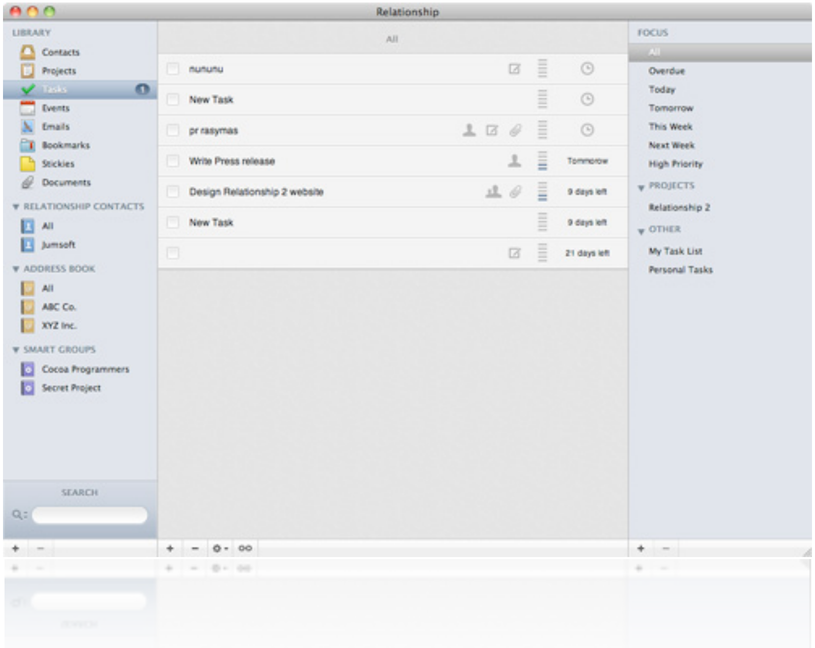
After you link a project to a number of items, the project window will contain references to these items with the possibility of clicking on them for viewing or editing. All linked items are also displayed in the Toolbar.

Deleting a project

1. Select the project you want to delete in the Toolbar.
2. Press the "-" button in the right Item Editor.



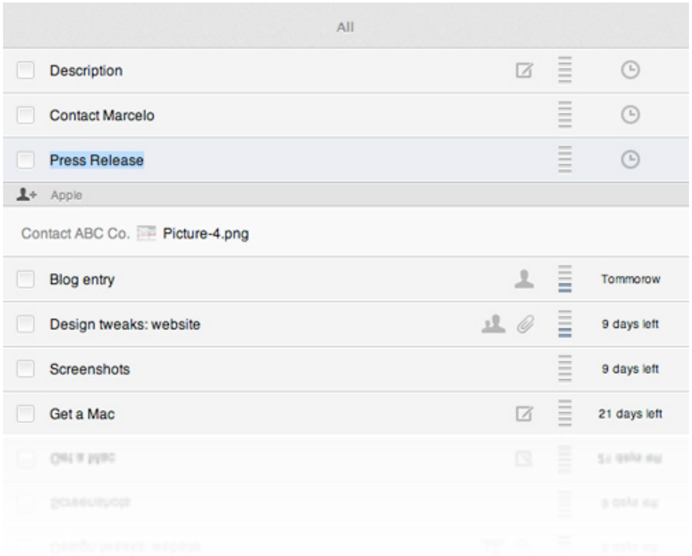
Tasks Overview



A task is a piece of work that you want to do. In Relationship, you can create tasks to maintain a record of what work needs to be completed within a certain time frame. For instance, "an article that should be completed this week" is appropriate for a task. Besides, you can make a note of tasks that should be performed by your colleagues or subordinates.

When you create a task, you can record information about it, such as related project, contact, or document, due date, and priority. Assigning priorities to tasks enables you to clearly distinguish the key tasks. You can enter all your tasks in the Tasks window, planning your work in one place, or add them as you manage your projects. Besides, you can create multiple task lists according to your needs.

New Task



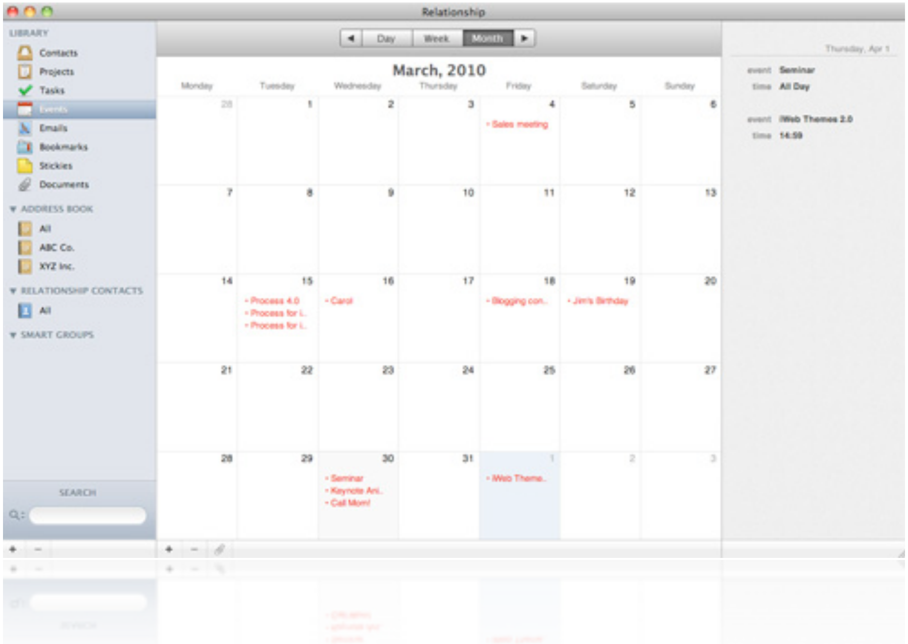
Adding a task

1. Move your cursor to Tasks in the Library and click the "+" that has appeared, or select Tasks and click the "+" button in the left Item Editor.
2. Enter the task information in the Workspace:
    - Task Name
    - Priority: 0 for lowest and 5 for highest priority
    - Due Date
    - Task owner (related contact): click the Add Contact icon on the left
    - Notes
3. Add a related document by dragging and dropping it on the Notes space.
4. The task will be displayed in the All section in the Toolbar as well as in its parent project and relevant date or priority groups (Today, Next Week, High Priority, etc.)

Managing a task

- To mark a task as completed, check the box on the left of the task row.
- To add a task to another project or to change its date or priority, you may drag the task with the cursor onto a relevant group in the Toolbar.
- To change the sorting order, click the Gear button in the left Item Editor.
- To link a task to an item, select it and click the Link button in the left Item Editor.
- To delete a task, select it and click the "-" button in the left Item Editor.
- To create a new task list, click the "+" button in the right Item Editor.

Events Overview



An event is an appointment that you have agreed to have at a certain time on a specific date. For instance, you agreed to meet with your client John Doe on March 30th, between 10 a.m. and 11 a.m.

Normally, you would create appointments for your contacts; however, in Relationship you can also create events that are linked to projects for giving the events a more powerful context. The event window records specifics about where and when the event will happen, which are later displayed in the Toolbar. If you have all-day events that span one or more complete days (such as a conference), you could use the all-day event feature.

If you have events that are repetitive, you can repeat them daily, weekly, monthly, or yearly until you come to a finish date. For example, a weekly sales meeting or gym session can be set up as an event a repeating event.

Set up alarms, so that you will never forget about an upcoming event. You may choose a silent reminder message or one with a sound. You can also set up a file that should be opened or a script that should be run on the selected date. The reminder message would pop up in the iCal Alarm window.

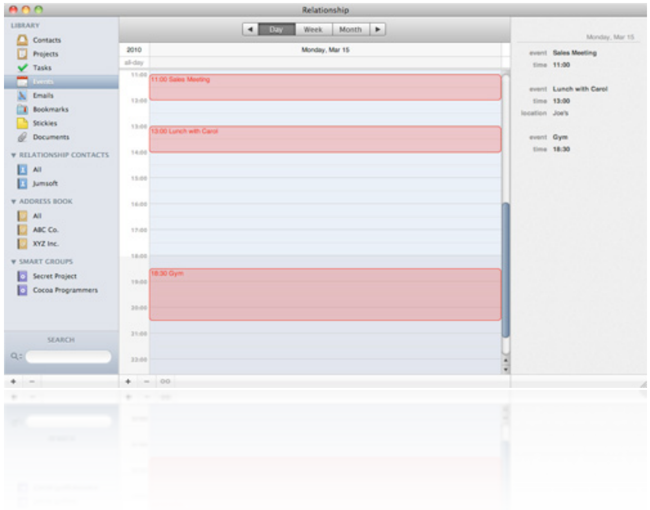
Event Views

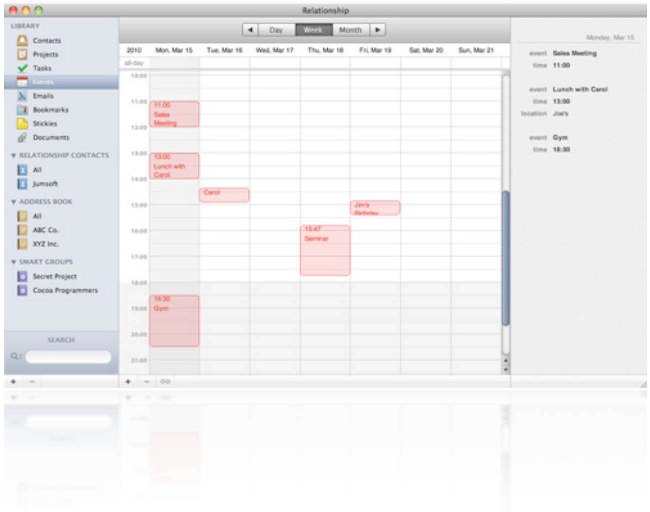
You can view events by day, week, or month. You can also change what days and times appear in the Workspace.

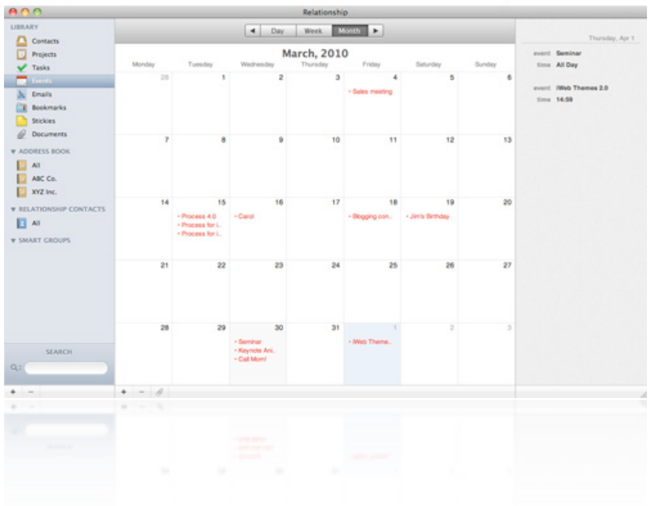
To view the events for the current day, week, or month, click the Day, Week, or Month button at the top of the Events Workspace.

To flip through different days, weeks, or months, use the left or right arrows next to the View buttons.

To see events that are earlier or later in the day, use the scroll bar on the right side of the Workspace in the Day view.







New Event

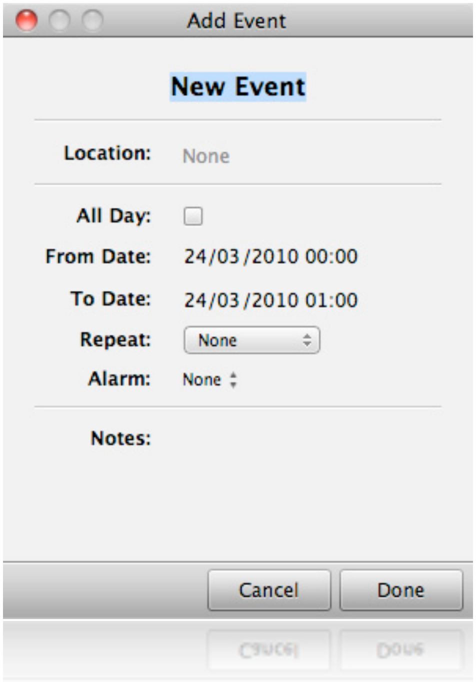
Adding an event

1. Move your cursor to Events in the Library and click the "+" that has appeared, or select Events and click the "+" button in the left Item Editor.
2. Enter the event information in the Add Event window that has appeared:
   - Event Name (default name is New Event)
   - Location
   - All Day: Check the box if the event should last all day long.
   - From Date
   - To Date
   - Repeat (none, every day, every week, every month, every year)
   - Alarm (none, message, message with sound, open file, run script)
   - Notes
3. Click Done to save the event. All events of the day, week, or month (depending on the view) are displayed in Workspace, while the Toolbar shows a detailed list of events set for a selected day.

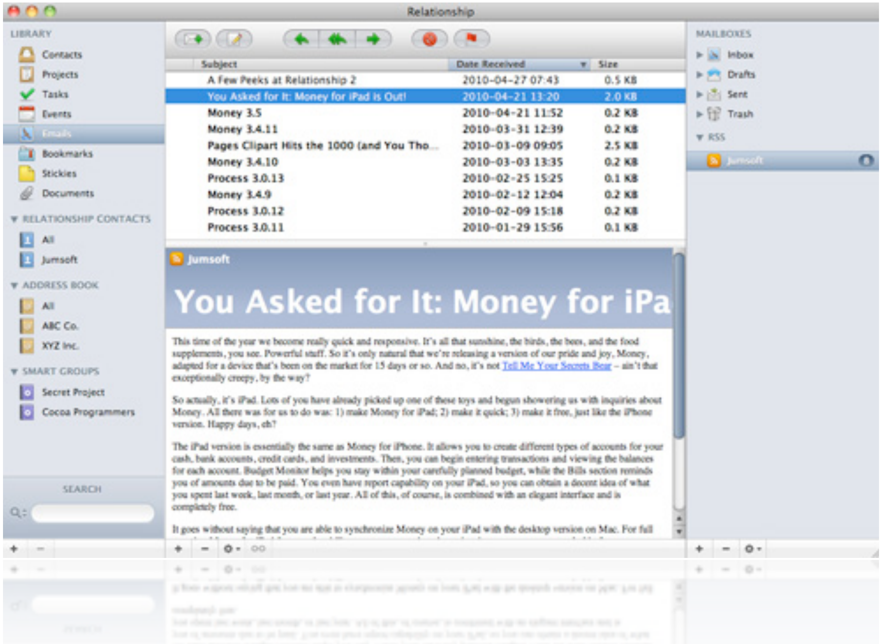
Note: All-day events are shown across the top of the day in Day or Week view.

Managing an event

- To change the time or day of an event, drag it to the new time or day in the Workspace.
- To change an event's duration, drag the event's top or bottom edge. (You can resize events only in the Day or Week view.) If the event is an all-day event, in Week view, drag the left or right side of it.
- To edit other characteristics of an event (e.g., its name, how often it repeats, or whether it has an alarm), double-click the event.
- To link an event to a contact, select the event and click the Link button in the left Item Editor.
- To delete an event, select it and press Delete or click the "-" button in the left Item Editor.



Emails Overview



The Emails section allows you to integrate one or more email accounts with Relationship to send and receive messages directly in the application. This feature also allows creating and managing email campaigns based on your contact groups. Email messages may be linked with contacts and projects.

Your email messages are stored in mailboxes, which are displayed in the Toolbar:

- Inbox, for messages you have received (with a separate inbox for each email account)
- Drafts, for messages you have written and saved, but have not sent.
- Sent, for copies of messages you have sent.
- Trash, for messages you have deleted.

A separate section in the Toolbar displays the RSS feeds you have chosen to follow. To add an RSS feed, click the "+" button in the right Item Editor.

Customizing the Emails Workspace

- To change or reverse the message sort order, click a column header in the Workspace. For example, to sort messages by sender, click the From column header.
- Rearrange the order of the displayed columns by dragging the column headers left or right. To adjust the column width, drag the separator lines between the column headers.

Email Accounts

Relationship gives you the option of setting up your email accounts in the Preferences section or, if you use Apple Mail, simply importing your Mail account information.

Adding an account in Preferences

1. Go to Preferences > Email Accounts.
2. Click the "+" button.
3. Enter the New Email Account information:
   - Account Name: The name that will be displayed in your inbox accounts list in the Emails Toolbar.
   - Full Name: The sender name that will be displayed to your recipients.
   - Email Address
   - Password: The existing password for accessing the email account you are trying to integrate.
4. If you are adding a Gmail, AOL, AIM, GMX, mac.com, or me.com account, you may choose to set it up automatically from this point.
5. In all other cases, click Continue and enter further information (you can find it in your email client settings):
   - Account Type: POP3 or IMAP
   - Incoming Mail Server
   - Port
   - Username
   - Password
   - Use Secure Sockets Layer (SSL): Check the box for a secure connection to a mail server. SSL prevents other users from "listening in" to your communication to gain unauthorized access to data.
6. Again, click Continue and enter further information (you can find it in your email client settings):
   - Outgoing Mail Server
   - Port
   - Use Secure Sockets Layer (SSL): Check the box for a secure connection to a mail server.
   - Use Authentication: Check the box to add security to your outgoing communication. Then enter the following:
     - Username
     - Password
7. Click Done when you are finished.

Importing Mail accounts

1. Select File > Import > Import Mail Accounts.
2. Select which of your Mail accounts you wish to import.
3. Check the "Do not include emails" box if you use a POP account and you do not wish to import any existing messages. With IMAP, they will be downloaded anyway.
4. Click Done to import the accounts.

You can select the frequency of checking for new email messages in Preferences > Email Accounts.

Email Messages

Creating a new message

- Move your cursor to Emails in the Library and click the "+" that has appeared.
- Select a contact in the Contacts Workspace, right-click, and select Write Email.
- Press the New Message button at the top of the Emails Workspace.
- Click the "+" button in the left Item Editor.

You may create your email signatures in Preferences > Signatures and add them to your messages automatically. To add a file attachment from your hard drive, click Attach and select the relevant file. To save the message and send it later, click Save As Draft.

You may also reply to or forward received messages. To do that, click the Reply, Reply to All, or Forward button at the top of the Emails Workspace.

Sending a message to multiple contacts

- Select several users by holding Cmd and clicking on their names in Contacts. Then, right-click and select Write Email.
- To send an email to a whole group, select the group and press Cmd + A. Then, right-click and select Write Email.

Deleting a message

1. Select the message you want to delete.
2. Click the Delete button at the top of the Emails Workspace or the "-" button in the left Item Editor.

Deleted messages remain in the Trash mailbox in Toolbar until they are permanently erased. To erase deleted messages, open Trash and repeat the standard deleting procedure.

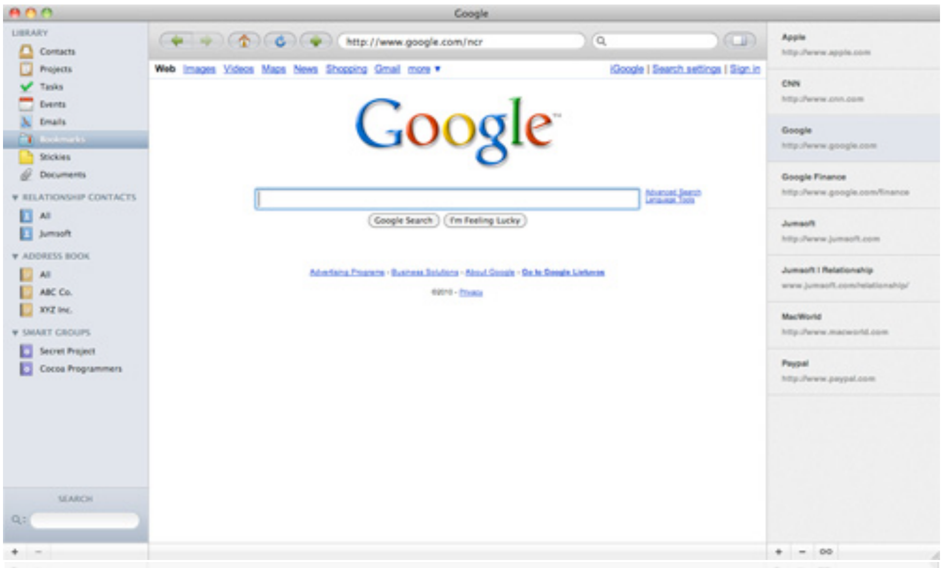
Flagging a message for action

1. Select a message in the Workspace.
2. Click the Flag button at the top of the Emails Workspace. Alternatively, right-click the message and select Mark > As Flagged. The latter method can also be used to mark messages as read, unread, or unflagged.

Linking messages

1. Select the message you want to link.
2. Click the Link button in the left Item Editor and select one or more contacts or projects to link to.

Bookmarks Overview



Relationship has an embedded browser, which allows browsing the Web without leaving the application. Bookmarking lets you easily return to your favorite Web pages and link them to your selected contacts or projects.

The bookmark list is displayed in the Toolbar, but can be hidden by clicking the List button at the top of the Bookmarks Workspace.

New Bookmark

Adding a bookmark

1. In the embedded browser, go to the Web page you want to bookmark.
2. Click the Add button next to the Web address field.

or

1. Move your cursor to Bookmarks in the Library and click the "+" that has appeared, or select Bookmarks and click the "+" button in the right Item Editor.
2. Type a name for the bookmark in the Add Bookmark window that appears.
3. Type the URL address.
4. Click Done.

To open a bookmark in the Workspace, click on its name in the Toolbar.

To move through your recently visited pages, click the Back and Forward buttons at the top of the Workspace.

Deleting a bookmark

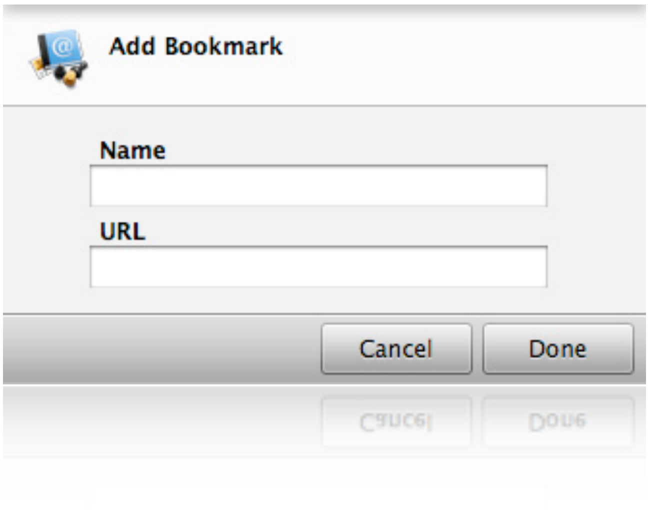
1. Select the bookmark you want to delete.
2. Click the "-" button in the left Item Editor.

Returning to the original bookmark

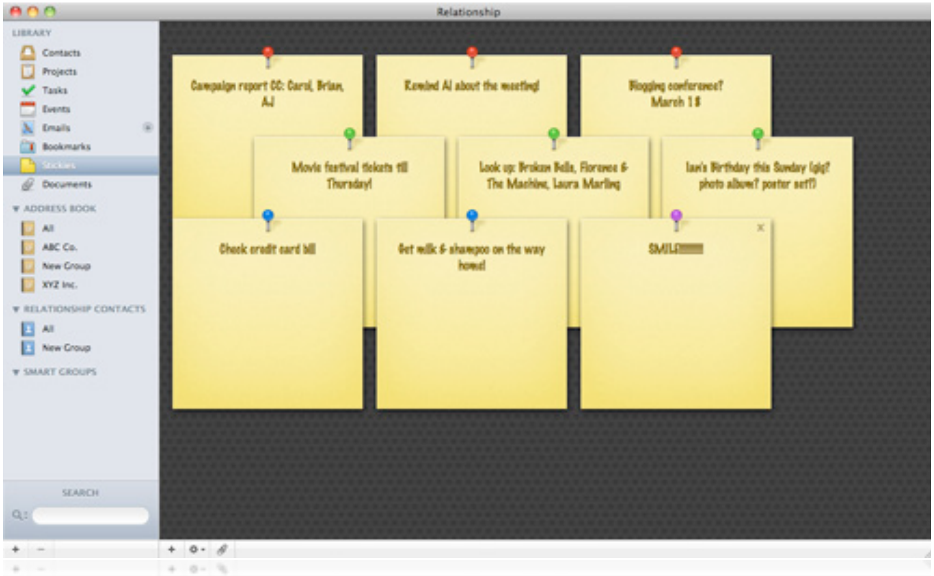
1. Click on a bookmark to view it in the Workspace.
2. Visit some Web pages. For example, follow some links or type an entirely new Web page address and browse it.
3. Click the Home button at the top of the Workspace to return to the original bookmark.

Linking bookmarks

1. Select the bookmark you want to link.
2. Click the Link button in the right Item Editor, and select one or more contacts or projects to link to.



Stickies Overview



A sticky note is a brief record of information that can be created on its own or linked to a contact or project in your database. These notes are supreme for reminders and bits of data that do not fit anywhere, but that are nevertheless valuable and cannot be lost—for example, a list of colleagues for participation in talks with a client.

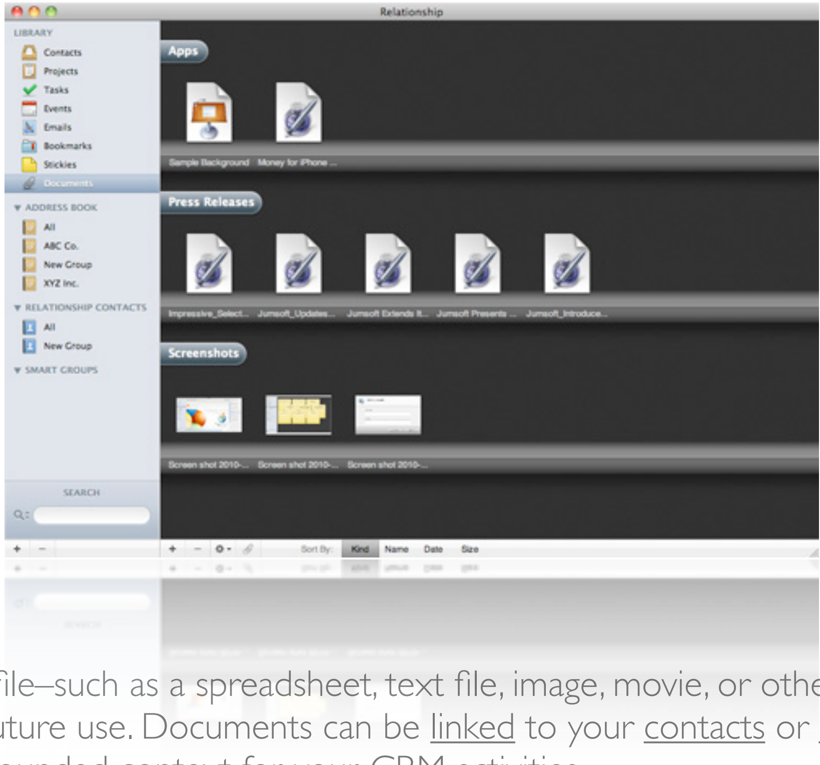
Creating a sticky note

1. Move your cursor to Stickies in the Library and click the "+" that has appeared or select Stickies and click the "+" button in the left Item Editor.
2. Type text in the note that has appeared.
3. Click on the pin to choose a color mark (e.g. red for work notes, green for leisure, etc.).

Organizing sticky notes

- To reposition a note, drag it with the cursor.
- To organize a number of notes, click on the Gear button in the left Item Editor and select Tile Items or Cascade Items.
- To link a note to a contact or project, click on the Link button in the left Item Editor.

Documents Overview



A document is a file–such as a spreadsheet, text file, image, movie, or other–added to Relationship for future use. Documents can be linked to your contacts or projects to achieve a better-rounded context for your CRM activities.

Arrange your documents on shelves or sort them by name, size, and other parameters.

New Document

Adding a document

- Move your cursor to Documents in the Library and click the "+" that has appeared.
- Select Documents and click the "+" button in the left Item Editor.
- Drag a file from Finder and drop it on the Workspace.

Creating a new shelf

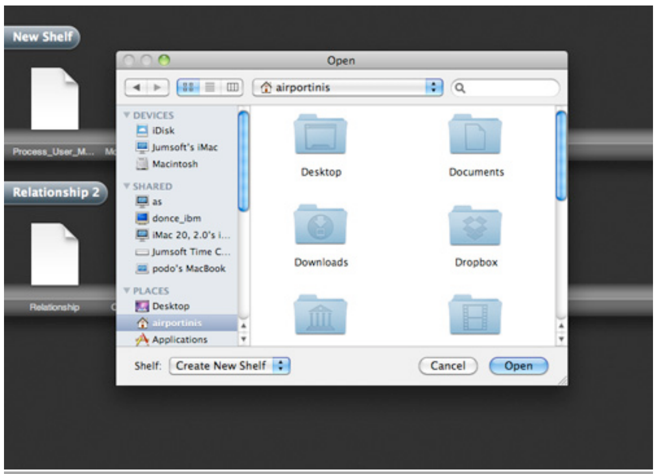
- Click on the Gear button in the left Item Editor and select Add New Shelf.
- When adding a new document, notice the Create New Shelf pop-up in the Open window. If you choose to create the new shelf, the newly added document will be automatically placed in it.

Managing documents

- Right-click on a document for the following options:
  - Open
  - Open With (presents a choice of applications for opening the file)
  - Quick Look
  - Slideshow
  - Delete
- To change the documents' sorting order, make a choice in the left Item Editor (by kind, name, date, or size).
- To move a document from one shelf to another, drag it with the cursor.

Linking a document

1. Select the document you want to link.
2. Click the Link button in the left Item Editor and select one or more contacts or projects to link to.



Password

If you share your computer with other users, you may be concerned that they could access your CRM records. You will be pleased to know that Relationship provides simple password protection to lock your sensitive data away from unwanted visitors.

Enabling password protection

1. Select Relationship > Preferences > Security.
2. Click Set Password.
3. Enter and confirm the password in the sheet that appears.

The next time you try to open Relationship, the password field will appear. Enter the password and press Enter (Return).

Disabling password protection

1. Select Relationship > Preferences > Security.
2. Click Remove Password.
3. Enter the password in the sheet that appears.

Backup

One of the best ways to protect your Relationship data is to back it up regularly. Relationship makes it very easy to back up your data to your MobileMe account. If you do not have a MobileMe account, you can learn more about it on Apple's Web site.

Backup to MobileMe

1. Select File > Backup to MobileMe. Relationship will automatically access MobileMe using the account information you have indicated in Apple > System Preferences > MobileMe. If Relationship has a problem connecting to MobileMe during the backup process, check your configuration settings there.
2. During the backup, Relationship saves a compressed copy of your data file to the following location: iDisk/Documents/Jumsoft/Relationship/. The file called datafile_backup.dat will be overwritten after every backup you perform.

Restoring data from MobileMe

Select File > Revert from MobileMe. Relationship will automatically access MobileMe.

Note: When you use Revert, all your local data in Relationship will be overwritten and will not allow a recovery.

Thank you for using *Relationship*!

If you have any problems with the application, please visit our Web site at *www.jumsoft.com/support* or write an email to *info@jumsoft.com*.

For more information about Jumsoft products and services, visit our Web site at *www.jumsoft.com* or email us at *info@jumsoft.com*.

The Jumsoft Team
http://www.jumsoft.com