

# **CorpComContact**

**Web-based Contact Management with Integrated  
Multi-media Distribution Services**

## **CorpComContact User Manual**

CORPORATE **COMMUNICATIONS** CENTER, INC.

# CorpComContact User Manual

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# FOREWARD

## ***About This Guide***

From sending e-mail broadcasts, to managing your clients and prospects, this guide illustrates how to get things done efficiently and quickly. There are examples and screenshots to make following along a snap.

This guide is intended for end-users; admin only functions are not covered.

## ***CORPCOM BASICS***

### ***Parent—Child Relationship: Accounts and Contacts***

Corpcom has separate record layouts for Parent and Child records. The default names are Accounts (a Parent record typically used for company names) and Contacts (a Child record used for individual names).

A parent record may be linked to as many child records as necessary, but a child may have only one parent record. Thus an Account (typically a company or organization) may have:

- No contacts linked to it
- One contact linked to it
- Multiple contacts linked to it

Conversely, a Contact (typically, an individual) may be or have:

- Linked to no accounts, the contact is an entry for an individual only.
- A link to one account. For example, the individual contact works for a given company. ( A single contact may not be linked to more than one account)-

Your administrator may have chosen a different context for the parent/child metaphor. For example: Schools and Teachers, or Buildings and Tenants.

We've used "account" and "contact", where "account" is the parent and "contact" is the child throughout this manual. E.g. an account can have any number of contacts associated with it, but a contact will only be related to one account.

## Typographic Conventions

Description

### *Convention Example*

**Check for the confirmation e-mail.**

**Words in bold indicate an instruction or critical information. Text directing you to a figure, illustration, or table will be bolded as well.**

**Click *Delete* to remove the record.** Italicized words are used for emphasis.

*Delete* is permanent—there's no way to recover a deleted record.

## Screenshots

We've included various screenshots to give you a visual aid to go along with the text throughout the guide. We use the *default layout* and *default theme*. Keep in mind that your screen may look different, depending on your layout and theme choices.

## Help

In the upper right-hand corner, just below your username, you'll notice an icon. The *question mark* launches our online help system.

## Online Help

The question mark in the upper right of each screen launches our online help system. Help on this topic displays a selection of key topics based on the screen you're viewing.



**Figure A**

*FAQ's* will close help and navigate to a list of frequently asked questions.

*Question/Feedback*--ask a question we haven't covered or assist us in improving CorpCom with a suggestion or observation. **Enter your desired text in the box and click the submit button.**

## SCREEN LAYOUTS

### ***Navigation Button Row – Top of Screen***

At the top of most screens you will see a row of context-sensitive buttons. These are to reach: "Find Contact", "Find Account", "Add Contact", "Go to Contact Listing", "Go to Account Listing", "Compose Letter", etc. If you are in an Administrator account, other buttons are available to customize the system for all users.

Click a button to open the desired screen.

## ***LEFT HAND VERTICAL MENU BAR***

At the left side of all screens a vertical menu helps you navigate to various operations.

- Security and Settings - Allows you to customize your screens and password
- My List - Reaches various list maintenance operations
- Communications - Opens email and fax broadcast
- Configurations - Administrator accounts only. Customization, user-defined fields

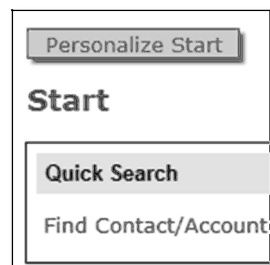
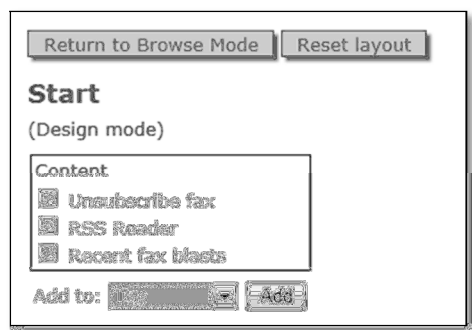
# START

## Overview

The Start screen is made up of panels that provide quick access for entering data/retrieving most up-to-date information. You may personalize the layout and content of this screen to suit your needs. Choose from 13 available panels by using drag-and-drop operation in Design mode.

## Design Mode

Click Personalize Start, located at the top left.



You are now in *design mode*. To reposition a panel, drag the menu bar with the cursor. A horizontal blue line indicates a valid drop point. You have four sections in which to drop panels: *top*, *middle left*, *middle right*, and *bottom*. Any panels that you close will appear under content. **To clear all panels**

**and start from scratch, click Reset Layout located at the top of the page.**

**Adding panel(s): checkmark, choose a section, click Add.**

To exit design mode at any time, **click anything on the left-hand menu or mouse-over Options and select “Return to Browse Mode”**.

## Recent updates

A quick glance at your Recent Contact/Account updates shows records you or other users have added or updated. **Click more to navigate to the detailed info page.**

## Statistics

Three different statistics categories are available as individual panel. Select Context and Lookup field to generate a quick count of those records. User-Defined fields of numeric data type also tally the sum of value assigned to each record.

Auto-Logs keep track of changes made to User-Defined fields tagged by your administrator. When an update is made on a tagged User-Defined field, the system captures both the original and revised value, along with the date time and User ID information. These log entries serve as a tool to monitor how active a given record is. These log



entries serve as a tool to monitor the activity of checkbox, radio button or dropdown list fields. Multi-word field names (up to 50 characters), may serve as scripts to define actions to be taken. Clicking the appropriate checkbox tracks the dates various activities are marked as complete.

## Filter Statistics

Filter statistics works in conjunction with three other statistic panels. **Click Filter to view the list of filters you've created.** Selecting a filter applies it to your opened statistic panels. In other words, the counts/sums in statistic panels reflect only records returned by the selected filter. **Remove reverts to the counts/sums of unfiltered list.**

## Recent e-mail campaigns and fax blasts

*Recent e-mail campaigns* and *fax blasts* allow you to check the status of your broadcasts. **Click Job No. to glance at the job status. Click details to look up or opt-out a specific e-mail address in that broadcast.** You can also do this from the start page via the *unsubscribe e-mail* or *unsubscribe fax* panels.

## Unsubscribe

Use Unsubscribe tools when you need to add a Contact to CorpCom suppression/Opt-out list. **Type e-mail address/fax number into its respective field, and click Submit.** The individual remains in your list, but his/her address will be automatically excluded from future e-mail/fax lists. An Opt-out entry stays in CorpCom suppression list, even when the Contact record is removed permanently.

## Quick Search

Quick Search is reached from the Start screen and also from the row of buttons at the top of most screens. These screens include the Contact Detail, Account Detail, Contact Listing and Account Listing screens. Click the “Find Contact” or “Find Account” button to open the search function.

See the “Find Account or Contact: Quick Search and Advanced Search” section later in this manual for details on how to use the search functions.

Start	
<b>Quick Search</b>	
Find Contact/Account	<input type="text" value="Last Name or Account Name"/> <input type="button" value="Search"/> <a href="#">Advanced Contact Search</a> <a href="#">Advanced Account Search</a>
<b>Menu shortcuts</b>	
<a href="#">Account listing</a> <a href="#">Contact listing</a> <a href="#">Add Account</a> <a href="#">Add Contact</a>	

## CONTACT LISTING AND ACCOUNT LISTING SCREENS

The Contact Listing and Account Listing screens display row-by-row listings of contacts or accounts. The screens are reached by clicking on Contact Listing or Account Listing in the left hand vertical menu, or on the buttons for “Go to Contact Listing” or “Go to Account Listing” found at the top of most screens

### ***Listing Screen Features***

- **Navigation Button Row** – Top of screen. Buttons to reach other screens
- **Filter Tabs** – Horizontal set of tabs to select and apply a filter and view results
- **Listing of All Filters** bar. Click the down-arrow icon to open a filter list or create a new tab
- **Filter Counts** bar – Click the down arrow icon to open a set of counts for the active Filter Tab
- **Alphabetic Index Section Selector** – Following “[All]”, the A B C D ...Z selector tool, used to display records by letter of the alphabet, or by clicking [All], the entire list.
- **Page Navigation Arrow Icons** - Right of screen arrows ◀ ▶ to page through the list
- **Column Headings** – Click a heading to sort the page by that column. Click again to reverse
- **Listing Entries** – Each row shows a company (Account) or individual (Contact).
- **Page Number and Record Count** – Bottom of screen.

### **Contact Listing Screen**

Find Contact	Find Account	Add Contact	Delete selected records	Add selected records to Action List	Configure column layout												
Enable/Disable fields	Rename field																
<b>Contact Listing</b>																	
ALL RECORDS my test filter test state test zip My Action List 1																	
Listing of all Filters																	
Filter Counts																	
<b>Contact - A</b> Switch to Account listing																	
Selection letter below indexed by: Last Name																	
[All] A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																	
# of Records/page: 50																	
Page 1 of 5																	
◀ ◁ 1 ▷ ▶ ▶▶																	
<table border="1"><thead><tr><th></th><th>Company Name</th><th>Last Name</th><th>First Name</th><th>Title</th><th>Department</th></tr></thead><tbody><tr><td>Detail</td><td>AABC Sample Company</td><td>Aable</td><td>Bill</td><td>Vice President</td><td>Marketing</td></tr></tbody></table>							Company Name	Last Name	First Name	Title	Department	Detail	AABC Sample Company	Aable	Bill	Vice President	Marketing
	Company Name	Last Name	First Name	Title	Department												
Detail	AABC Sample Company	Aable	Bill	Vice President	Marketing												

### ***Navigation Buttons***

The row of buttons at the top of the screen used to reach other screens such as “Find Contact”, “Add Contact”, etc. These are context sensitive buttons which vary from screen to screen.

### ***Filter Tabs***

A horizontal row of tabs used to control which records are shown in the list. Click the tab “ALL RECORDS” to display the full list, page by page. The other buttons represent various filters which can be applied. Clicking a filter button will apply the filter and

display the resulting filtered records in the listing below. The active tab is shown in a solid color.

To apply a different filter click one of the other tabs. Creation of new filter tabs is described in the Listing of All Filters section below.

## Filter Tab Types

**Fixed Tabs.** These tabs, including the leftmost “ALL RECORDS” tab are always visible on the Listing Screens. They are designed for use by all users in your organization. Fixed Tabs can be changed, new ones created, or deleted from the Administrator’s Account.

**Removable Tabs.** Tabs marked with an “X” may be removed by clicking the X. Removing a tab does not delete the underlying filter, however it does delete the tab itself. To restore a removed tab you must recreate it using the “Create Tab” command opened from the “Listing of All Filters” bar.

The screenshot shows the 'Account Listing' interface. At the top, there are three tabs: 'ALL RECORDS', 'Filter B' (with an 'X' icon), and 'Filter A' (with an 'X' icon). Below the tabs is a section titled 'Listing of all Filters' with a checkbox. A message states: 'To create a shortcut (tab) for a view, click 'Create tab' link next to the View Description.' Below this, there are two radio buttons: 'My Filters' (selected) and 'All shared Filters'. A page indicator shows 'Page 1 of 3'. A table follows with a 'View Description' header. The table has four rows, each starting with a 'Create tab' link and followed by a filter description.

	View Description
Create tab	2009 Office of the Directors
Create tab	Annual Rep, Contact and Account Count
Create tab	Annual Rep, Contacts&Accounts, All Categ, Multiple
Create tab	Annual Rep, Contacts, All Categ, One copy, domesti

## Viewing Filters and Creating Filter Tabs – “Listing of All Filters” Bar

Click “Listing of all Filters” to drop down list of all available filters. This opens a filter utility to:

Limit the list to My Filters or expand to All Shared Filters

Create tabs for filters

**My Filters and All Shared Filters Buttons.** Click My Filters to list only those filters created in your account and those you’ve copied from shared filters. Click All Shared Filters to list all filters.

Note that the function cannot prevent viewing or use of your filters by other users. The function does not control which Tabs are displayed. Tabs are controlled by the Create Tab command and removed by the “X” icon within the tab itself.

A tab may not exist for a filter you see on the list and need. Use “Create Tab” as described below.

Create tab. Click “Create Tab” to the left of the filter you want to use. This will create a tab for the filter. The active tab is highlighted and the resulting list is also displayed.

You may create tabs for multiple filters; however for easy navigation, you should only add tabs for filters that are commonly used. When you exceed four tabs, click the arrow buttons ◀ ▶ at the right of the tabs bar to scroll through them.

Click on a tab to make it the active tab. The active tab is highlighted with a solid color, depending on the color scheme you have chosen for your account. An active tab displays the list based on its underlying filter. Click the x inside a tab to remove it. When you remove an active tab, the listing reverts back to the left-most tab. The left-most tab will always be the unfiltered list. It is the default tab and cannot be removed.

**You may toggle between account and contact listing views using the “Switch to Account Listing” or “Switch to Contact Listing” link shown on each screen.**

### ***“Listing of All Filters” compared to “Filter Management”***

The menus reached from Listing of All Filters, a bar shown on Listing Screens, helps you use filters.

- view a list of filters,
- click a tab to display a filtered list
- create tabs and remove tabs.

Menus reached from Filter Management, a tab on the left of all screens, helps you build and modify filters:

- View a list of filters
- Inspect a filter (The terms within the filter)
- Copy a filter
- Modify a filter
- Write a new filter
- View counts of accounts and contacts produced by a filter. (Filter Counts described below also shows counts)

See the chapter “Filter Management” for instructions on writing filters.

### ***Filter Counts Menu Bar***

Click on this bar to open a set of counts produced by a filter. The Contact Listing screen shows counts of contacts, the Account Listing screen shows count of accounts.

The counts are presented in a grid. The first line shows counts of records selected by the filter.

The second line shows the total records in the data base.

Three columns are presented for both rows. For contacts the columns are:

- |          |   |
|----------|---|
| Column 1 | Contacts With No Link To an Account   |
| Column 2 | Contacts Linked To An Account   |
| Column 3 | Total Contacts – Includes both contacts linked to an account and individual contacts with no link to an account. The counts are non-duplicated – a name is counted only once. |

A similar grid is used for accounts on the Account Listing screen.

The Filter Management menu, described in a later section, provides both the Contact and Account numbers in a single six-column grid.

## Alphabetic Index Section Selector

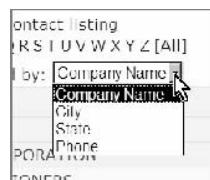
The alphabetic row lets you click on a letter to restrict the list.

Depending on whether you are in the Contact Listing screen or Account Listing screen, you will see the bolded word **Contact** or **Account**, followed directly a letter, or the word [All]. If a letter, that will be the only section of the alphabet displayed in the list. The All signifies that you can page through the entire list.

## Column Headings

The default column headings are Company Name, First Name, Last Name, Title and Department. Your Administrator may define a different set of columns. Alternate headings might be Phone Number, Address, City, State, ZIP, Email Address, etc. A small window is displayed above the alphabet row. This allows you to choose which column the alphabetic selector feature operates on. Choose the column you want as the index from the dropdown list, then click an index letter (A-Z), or [All]. CorpCom displays records beginning with the index letter. If All is selected it starts at the beginning of the list.

For example, if you want to list all records whose city starts with “B,” choose City as the index and B as the index letter.



There are two cases when CorpCom

displays zero records:

1. No records contain the field. E.g., you select *Phone*, but none of your records contain phone numbers.
2. No fields begin with the letter. E.g., you select *State* and the letter *B*, but there are no states in the U.S. that begin with *B*.

You may also see rows with no entry for Company Name, Last Name, etc. This indicates that there is a record, probably entered with a Title or Department only, but no person or firm name exists. The record may be valid. Or, you can inspect the de

Click a column header to sort alphanumerically. This sorts the entries on the page only,

not the entire database. Clicking detail navigates to the full record.

Company Name	
Detail	AABC Sample Company
<input type="checkbox"/>	AABC Sample Company
Detail	AABC Sample Company
<input type="checkbox"/>	AABC Sample Company
Detail	AABC Sample Company
<input type="checkbox"/>	AABC Sample Company

## Page Numbers and Record Count – Bottom of Screen

In the bottom left the page number and number of pages is shown. For example: Page 1 of 15, or Page 3 of 15. Below that the Total Records shows the number of records selected by the filter. This will match the Total counts shown by the more detailed “Filter Counts” dropdown previously described.

Bottom right of the screen provides an arrow ◀ ▶ navigation tool to navigate forward and back through pages, or by using the dropdown box to a specific page number.

## Listing Rows – Click “Detail” to Open Full Edit Screen for a Record

Each row in the list shows a record. Click the word “Detail” to the left of a name to open a “Contact Detail” or “Account Detail” screen. These screens are full edit screens that show all database fields.

**Checkboxes Left of Names.** A checkbox is seen at the left of each listing line. The boxes may be checked to mark an entry for **Deletion** or **Add to Action List**.

To delete a record(s): Click the checkbox(es) next to the records you want to delete, then in the top of screen “Navigation Button Row” click the “Delete Selected Records” button. You will be given a warning “Are You Sure You Want to Delete These Record(s). Confirm your choice. The records will be permanently deleted.

For Action List selections see the section below.

## Menu Shortcuts

Click Add Account or Add Contact, depending on which type of record you’re viewing, create a new record.

Click on *Find Account* or *Find Contact* to navigate to the respective search screen. More information on using the search function can be found on page (enter page number).

Find Contact/Account	Last Name or
<b>Menu shortcuts</b>	
Account listing	
Contact listing	
Add Account	
Add Contact	
Find Account	
Find Contact	
Schedule fax blast	
Schedule e-mail campaign	
Export list	
Distribution Chart	

## DETAIL SCREENS – ACCOUNTS AND CONTACTS

### **Contact Detail Screen -Address Fields**

Contacts may hold two addresses:

1. Individual address such as home address and
2. Account Address, such as the company address.

**Address Type.** The Address Type dropdown list lets you specify which address will show in the address fields. You can toggle between the Individual Address view and the Account Address (typically the contact’s company address) view using the dropdown.

An Account Address exists only if the contact is linked to an account.

**Editing Addresses.** Select the address type from the dropdown bar for editing. Individual addresses may be entered or modified in the Contact Detail screen.

Note that the address data for Account Addresses (shown greyed-out) must be entered on the Account Detail screen. Move to the Account Detail screen, enter or update the new account address on the Account Detail screen, then switch back to the Contact Detail screen to see the entry listed on the contact screen. When you switch away from the Contact Detail screen, then return back from the Account Detail screen, note that the address shown on the Contact Detail screen will default to whichever address is specified in the Address for Mailings buttons.

Further note that the buttons for “Address for mailings” and “Address Type” dropdown work independently. This allows you to change address data in either the Account Address or the Individual Address without changing the specification for which address to export for mailings.

**Update Button.** Be sure to click the “Update” button if you want to save any changes to the Address Type status or to any changes to Address, City, State, Zip, etc.

### **Contact Detail Screen – Edit Individual Address or Account Address**

Note: Address Type displayed will be the one used in Exports and Listing Screens.

Address Type	Individual Address	
Address 1	Select one	Address Type
Address 2	Account Address	
	Individual Address	
City	Dallas	
State	TX	
ZIP	00000	
Country		
Owner	Office of President	
Response		
Source		

### **Account Detail Screen -Address Fields**

Accounts (typically companies) are limited to a single address. Account address field

names are preceded with the letters AC (for Account). This helps you distinguish between account address data and contact data fields if you export the list to Excel.

1. Individual address such as home address and
2. Account Address, such as the company address.

## Creating a Record

After clicking *Add new account* or *Add new contact* from the top row button menu, you will be presented with a blank edit screen in which to enter the new account/contact data. After you have filled on all the relevant fields, click Save.

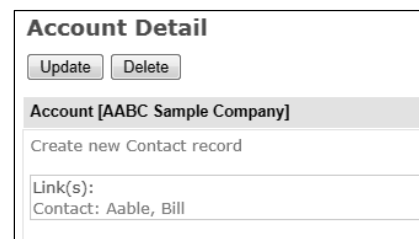
If you have a contact that will be linked to an account you may have two scenarios:

- An account already exists - Open the account detail, then click “Create new record”. Enter the new contact data, then save.
- Contact
- Account does not yet exist - Create a new account first, enter the account data, click “Save”, then from the resulting Account Detail screen, click “Create new Contact record”. Enter the new contact data, then save.

## Linking an Account


When adding a contact, you can link it to an account. You can add a contact directly automatically linked to an account by clicking the *Create new Contact Record* link on an account screen. This screen also lists all other contact associated with the account.

The alternative way to link a contact to an account is to click on the Account bar of a contact and enter the account name in the provided field. Click View Results. A list of matches is shown below. Click select next to the correct account. Your contact is now linked to the selected account.



Account Detail	
Update	Delete
Account [AABC Sample Company]	
Create new Contact record	
Link(s):	
Contact: Aable, Bill	

## Contact Detail Illustration



Contact Detail	
Edit Contact	
Update	Delete
Account [AABC Sample Company]	
Contact is linked to AABC Sample Company	
Unlink	
To link to a different Account record, enter part of the Account name in the search field below:	
<input type="text"/>	View Results

You can unlink a contact from an account by clicking the unlink icon next the account name. If you choose to delete an account which is linked to a contact, be sure to unlink any contacts you wish to keep before making the deletion. When the



Account is deleted any linked contacts will be deleted as well.

## Agenda

Any events, notes, and journals you set in *Calendar* appear in the *Agenda* accordion panel for the account/contact they're linked with. *Communication Log* displays fax and e-mail broadcast activity for that record.

Agenda		
<input checked="" type="radio"/> Event <input type="radio"/> Note <input type="radio"/> Journal <input type="radio"/> Communication Log <span style="float: right;">New Entry</span>		
Date/Time	Subject	Description
3/16/2012 2:30:00 PM	-Unassigned-	Meeting

Click *New Entry* to jump to event creation in *Calendar*.

## Associations

Use *Associations* to form links between records in CorpCom. This is an easy way, for example, to make your own shortcuts in order to jump between related contacts and accounts.

**Association**

View or create relationship with other Account or Account.

☒ Association(s) with Account  
☐ Association(s) with Contact

No association found  
To create an association with a Account, enter the name below:

## FIND ACCOUNT OR CONTACT: QUICK SEARCH AND ADVANCED SEARCH

### Using Quick Search or Advance Search

These functions allow you to quickly “Find” or “Search For,” an individual person (contact) or company (account). Look at the top menu bar of most pages and you will see buttons for “Quick Search” and “Advance Search”. Quick Search may also be found on the Start Menu.

Clicking on one of the buttons takes you to the Search functions Quick Search and Advanced Search:

Quick Search

Find Contact/Account

---

Advanced Search

Enter value(s) in one or more fields in the edit screen below, then click **Find All**  Match

## Quick Search

Quick Search provides a single window to enter either a last name or company name. The system will find and show a list of any matches. The system looks for both partial and full character matches.

1. First it looks for the first characters you enter to match a name.
2. If you continue typing a full name, the system will look for an exact match.
3. If neither a full name or first characters-typed match is not found, the system will look for a character string match within the name, and will display any matches.

Thus you don't need to specify whether you want first few characters, full name or contains-characters match. The system will intelligently look for all three and will display the correct matches in the Search Results widow. Click on the word **DETAIL** next to results person name or company name desired. This will open a Contact Detail or Account Detail edit screen.

## Quick Search Results Menu.

Search Results

Find Contact/Account   [Advanced Contact Search](#) [Advanced Account Search](#)

Drag a column header and drop it here to group by that column

1

Page size: 20

2 items in 1 pages

	Name	Address	City	State	Zip
	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
DETAIL	Corporate Communications Center Inc	4031 Harry Hines Blvd.	Dallas	TX	75219
DETAIL	Corporate Communications Center, Inc.	245 Walnut Lane	Oak Brook	IL	60523-1450

1

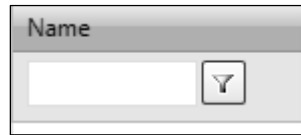
Page size: 20

2 items in 1 pages

Page 18 of 55

Some Quick Searches may yield a large number of matches. If so, two tools are available to find the exact entry desired in the list of matches. The first allows you to group entries by column. This may be used if you have a large number of result entries to look through and you want to inspect your list of results by City, State or ZIP.

A second tool, the small windows below each heading may be used to further filter a long list of results to find the name desired. Enter a few characters in the box, then click the Filter icon.



## ***Advanced Search***

Advanced Search allows you to search on multiple fields at once. It is available for Contacts or Accounts. The advance search windows look similar to full edit screen. Enter characters in any combination of fields, for example “Last Name” and “City”, then click the “Find All” button. It will display a list of any matches. Unlike Quick Search, the Advance Search does not use the grouping or filter tools because the list of matches is typically quite small.

Advance Search allows you to search by any field or combination of fields such as Phone Number, ZIP code, Email Address, category, document code, etc.

A window allows you to specify whether you want to search by the first few characters, by a full match or by a string of characters within a name.

## EXPORT WIZARD

The Export utility uses a wizard-style approach. It allows full/partial extract of your CorpCom list.

**Select a filter containing records that you want to export.** *Selected* filter panel displays the filter's name and total record count. To export the entire CorpCom list, select *\_Master List*. You may only export one filter at a time. Selecting a different filter will replace any previously selected one. **Click Next.**

**Tip:** Select e-mail/fax exclusion to leave out any records referenced in Opt-out list.

The screenshot shows the 'Export List' wizard with the 'Export Wizard' tab selected. On the left, there are input fields for 'Selected filter (Count):', 'Selected field(s):', and 'Result:'. The main area displays a table of filters to select from. The table has three columns: 'Select', 'List (filter) Description', and 'By'. The filters listed are: ALL RECORDS (System), 2009 Office of the Directors (C43CCC), Annual Rep, Contact and Account Count (C43CCC), Annual Rep, Contacts&Accounts, All Categ, Multiple (C43CCC), Annual Rep, Contacts, All Categ, One copy, domesti (C43CCC), Annual Rep, Contacts, All Categ, One copy, Intl (C43CCC), Board of Governors - Governors (donald), CFL (C43CCC), CFL - TEST (C43CCC), and Cntct-All documents plus Acct-All documents (C43CCC). Below the table, there is an 'Exclusion' dropdown menu with options: None, Exclude records found in Do Not Email list, and Exclude records found in Do Not Fax list. Navigation buttons 'Next' and 'Start over' are at the bottom right.

Select	List (filter) Description	By
Select	ALL RECORDS	System
Select	2009 Office of the Directors	C43CCC
Select	Annual Rep, Contact and Account Count	C43CCC
Select	Annual Rep, Contacts&Accounts, All Categ, Multiple	C43CCC
Select	Annual Rep, Contacts, All Categ, One copy, domesti	C43CCC
Select	Annual Rep, Contacts, All Categ, One copy, Intl	C43CCC
Select	Board of Governors - Governors	donald
Select	CFL	C43CCC
Select	CFL - TEST	C43CCC
Select	Cntct-All documents plus Acct-All documents	C43CCC

**Contact and/or Account fields that you need to export.** The top to bottom order of the fields in *Selected fields panel* reflects the field sequence in export file. Both the Account Fields and Contact Fields are available by clicking the appropriate bar. **Uncheck to remove from Selected fields panel. Click Next.**

The screenshot shows the 'Export List' wizard with the 'Export Wizard' tab selected. On the left, there are input fields for 'Selected filter (Count):', 'Selected field(s):', and 'Result:'. The main area displays instructions: 'Check the Account or Contact Fields to include in the export file. Select fields in the order desired for columns in the table. Your organization may have pre-defined field selections. Click Select Stored Templates to check. New selections may be named as a Stored Template for future use.' Below the instructions, there is a section titled 'Select Stored Templates:' followed by a table of fields. The table is divided into 'Account Fields' and 'Contact Fields'. The fields listed are: AC-Address 1, AC-Address 2, AC-City, AC-Country, AC-State, AC-ZIP, Fax, Federal Reserve Banks (FRB), Foreign, FRB Libraries, High Schools (HS), Junior Colleges (JC), Publication.AR, Publication.CFEU, Publication.CFL, Publication.EP, Publication.PW/EDNV, and Publication.RU. Each field has a checkbox next to it.

Select Stored Templates:		
Account Fields		
<input type="checkbox"/> AC-Address 1	<input type="checkbox"/> Fax	<input type="checkbox"/> Publication.AR
<input type="checkbox"/> AC-Address 2	<input type="checkbox"/> Federal Reserve Banks (FRB)	<input type="checkbox"/> Publication.CFEU
<input type="checkbox"/> AC-City	<input type="checkbox"/> Foreign	<input type="checkbox"/> Publication.CFL
<input type="checkbox"/> AC-Country	<input type="checkbox"/> FRB Libraries	<input type="checkbox"/> Publication.EP
<input type="checkbox"/> AC-State	<input type="checkbox"/> High Schools (HS)	<input type="checkbox"/> Publication.PW/EDNV
<input type="checkbox"/> AC-ZIP	<input type="checkbox"/> Junior Colleges (JC)	<input type="checkbox"/> Publication.RU

**Select export file format and type the file name, then click Run.** Download button will appear when export file is ready. Upon clicking the button, your browser will display a

File Download dialog box. Save the file to your computer.

**Export List**  
Export | Import

Export Wizard

Export as  
Comma separated value (.csv)

File name  
CorpComList.csv

Previous Run Start over

**Stored Templates for Repetitive Exports.** You may have certain export field selections you use repetitively. Once defined, these selections are stored within the Export List wizard (see screen-shot below labeled “Export List”.) Within the “Select Templates” section of the Export List screen, see the list of any templates already created for your organization. Click “Select” at the left of the template name you wish to select. This will cause the list of desired fields to be exported to be displayed in the Selected Field(s) section on the left of the screen. Then proceed with the Wizard using the “Next” button in the lower right.

Export Wizard

Check the Account or Contact Fields to include in the export file. Select fields in the order desired for columns in the table. Your organization may have pre-defined field selections. Click Select Stored Templates to check. New selections may be named as a Stored Template for future use.

**Select Stored Templates:**

		Template Name	Date Created	
Select	22	All Fields	5/24/2010 9:33:18 AM	Remove
Select	37	All Fields	11/15/2010 9:56:27 AM	Remove
Select	38	All Fields zzz	11/15/2010 9:57:26 AM	Remove
Select	39	All Fields zzz	11/15/2010 9:58:10 AM	Remove
Select	46	CoNameBank	9/12/2011 11:45:19 PM	Remove
Select	31	JOHNS TEMP	9/10/2010 2:23:54 PM	Remove

To define a new set of fields to be stored as a template, first select the desired fields as described in the instructions above. Then, use the “Save Field Selections As Template” option at the bottom of the screen to save the selection. First, give the field selection a name and enter it in the box left of the “Save As New Template” button. Click the button to save your field selection and template name. Click “Select Templates” above to refresh and see your new template name in the list. The new Stored Template will also be assigned an associated ID number. A Stored Template may hold both Account and

Contact fields.

**Modifying Existing Stored Templates.** Select the template you wish to edit, use the click boxes to add or delete fields, (both Accounts and/or Contacts), then click “Save Template Updates” to keep the modified template under its old name.

Alternatively, use the “Save As New Template” button to store it without overwriting the original template. In this case, give your modified template a new name by entering the new name in the box just to the left, then click “Save Template”. This sequence allows you to keep both the old template and the modified version. If you do not enter a new name for your modified Stored Template the system will create a new template using the old name coupled with a new number.

**Stored Template** The sequence described above uses the menu boxes shown below:

Create Stored Template from field selections above - Save As New Template. To modify existing Stored Template, check/uncheck Account/Contact Fields above, then Save As New or Save Template Updates.

CoNameBank

Save As New Template

Save Template Updates

Save As New – New or modified template - Enter new name (or system uses existing name with new number)

Save Template Updates – Saves modified template under existing Stored name and number.

Previous

Next

Start over

# IMPORT WIZARD

The Import utility uses a wizard-style approach. Know your source file name and location before you begin. The utility supports only Comma Separated Value (.csv) format. Complex files may need to be transformed and loaded by the technical staff at Corporate Communications Center, Inc.

**Click *Browse* to locate the file that you want to import.** Remember to click Upload before moving to the next step.

*Source fields* list box displays all fields contained in your .csv file. To map *Source* to *Destination* one field at a time, **highlight a field from *Source* and its destination, then click *Connect*.** Verify each pair of mapped fields listed on *Mapped fields* panel. Click disconnect icon next to a pairing to undo its mapping. Toggle between Account/Contact to display fields from either context. Click Next.

**Tip:** You can map a source field to more than one destination field, but you still need to map one field at a time.

The screenshot shows the 'Import List' window with the 'Import' tab selected. On the left, a sidebar shows 'Uploaded file (Count): Import.csv' and 'Mapped field(s): Source <=> Dest' with a mapping for 'CompanyName <=> Company Name'. The main area is titled 'Import Wizard' and contains the instruction: 'Mapping source fields: Select 'Source' and 'Destination' fields, then press 'Connect' button.' Below this, there are two list boxes: 'Source fields' containing 'CompanyName', 'Fax', 'FN', and 'LN'; and 'Destination fields' containing a dropdown menu set to 'Account' and a scrollable list of fields including 'A-Occupation', 'Account Manager', 'Address 1', 'Address 2', 'Address Type', 'Asset', 'City', 'Company Type', 'Country', 'Created', 'Division', 'Document.Annual Report', 'Document.Christmas Cai', 'Document.News Release', and 'Document.Proxy'. A 'Connect' button is positioned between the two list boxes. At the bottom right, there are three buttons: 'Previous', 'Next', and 'Start over'.

If necessary, you may designate default values to the rest of destination fields. **Highlight a field and type into/select a value from *Default value*.** Remember to click *Set Default* button before selecting another destination field. Click disconnect icon next to the destination field to undo. **Click Run to start import routine.**

**Import List**  
Export | Import

...

**Uploaded file (Count):**  
Import.csv

**Mapped field(s):**  
**Source <=> Dest**  
 LN <=> LN  
 Fax <=> Fax  
 FN <=> FN  
 CompanyName <=> Company Name

**Result:**

**Import Wizard**

Setting default value(s): Select a destination field and provide the corresponding value, then press 'Set' button.

Destination fields

Account

Market Cap Preference

Optional 1

Optional 2

Optional 3

Optional 4

Optional 5

Optional 6

Other Fax

Other Phone

Owner

Phone

Reference Code

Region

Remarks

Response

Default value

☒ High Yield

☐ Large Cap

☐ Mid Cap

☐ Small Cap

Set Default

Previous Run Start over

Upon completion, Result panel displays the number of records successfully imported into CorpCom. **Click *Download* button to review which records did not get imported, if any.** Contact the technical staff at Corporate Communications Center for help with any import errors.

**Import List**  
Export | Import

...

**Uploaded file (Count):**  
Import.csv

**Mapped field(s):**  
**Source <=> Dest**  
 LN <=> LN  
 Fax <=> Fax  
 FN <=> FN  
 CompanyName <=> Company Name

**Result:**  
Import Result: 0 of 0

Import routine is complete. Click 'Download' button to review any errors.

Download Start over



# FILTER MANAGEMENT

## What is a filter?

A filter or query is a set of conditions designed to select records from the list based on the content of one or more fields. It can be made up of a simple condition, or a compound condition. Compound conditions are made up of multiple conditions connected by *And* or *Or*. There is no limit to the number of simple conditions that can be present in a filter. Every record in the database is matched against the filter, those that meet the filter conditions are selected for viewing on the screen, printing in a report, exporting to a file or generating a list count.

Using the filter you may select sub-lists from the database. Filters apply to both accounts and contacts. CorpCom's filter utility allows you to use point and click techniques to build a query, name it and store it for repetitive use.

## Filter Management

Filters generate lists of contacts and accounts that meet specified conditions. The resulting sub-lists are used for:

- Contact Listing Screen

- Account Listing Screen

- Generating List Counts Export lists to Excel, CSV and text files

- Email and Fax Broadcasts

The Filter Management utility is opened from any screen from the left-hand vertical menu bar. Click "Filter Management" to open the Filter Mgmt and Counts screen.

## Filter Management and Counts Screen

This screen provides a list to view filter names, open counts, copy a filter, revise a filter and create a new filter. It also lets you control whether you view only your own filters or system-wide filters. *My Filters* displays only those filters that you've created. Click on the column names to sort the filters ascending/descending.

The screen is arranged in columns and rows. Each row shows a filter.

Create new FilterRemove Selected Filters

### Filter Mgmt and Counts

Click "Revise" right of desired filter to view filter and counts

☒ My Filters☐ All shared Filters

1 of 3

Counts	Name	Owner	Date	
+ <input type="checkbox"/>	2009 Office of the Directors	C43CCC	5/13/2009 4:14:00 PM	Copy Revise
+ <input type="checkbox"/>	Annual Rep, Contact and Account Count	C43CCC	10/29/2010 3:12:00 PM	Copy Revise

## Counts

To the left is a column of “+” (plus) signs. Clicking the + opens a count grid for the filter.

It shows counts for both contacts and accounts and has subtotals for contacts linked to an account and contacts with no link to an account. It shows counts for totals compiled by the filter as well as counts for the entire database.

Filter Mgmt and Counts

Click "Revise" right of desired filter to view filter and counts

My Filters

All shared Filters

1

of 4

Counts	Name	Owner	Date	
+ <input type="checkbox"/>	ALL RECORDS	System	1/1/0001 12:00:00 AM	Copy Revise
+ <input checked="" type="checkbox"/>	2009 Office of the Directors	C43CCC	5/13/2009 4:14:00 PM	Copy Revise
+ <input checked="" type="checkbox"/>	Annual Rep, Contact and Account Count	C43CCC	10/29/2010 3:12:00 PM	Copy Revise

To delete filters permanently, checkmark them and click Remove Selected Filters from the shortcuts popup. Grayed out (non-editable) filters were created in older versions of Corpcom. These filters cannot be revised or cloned, but you can still use them in the screens listed above.

## Filter Builder Screen

Reach the Filter Builder Menu from the Filter Mgmt and Counts Screen:

Create New Filter button	Top button row
Copy	Left of each filter name row
Revise	Far left of each filter name row

The Filter Builder menu uses point and click methods. Filters may have one condition line or multiple condition lines. Each line represents one condition. A condition specifies a field (last name, city, category, date added, document code, etc.) and a value that the field must match.



## Create New Filter, Revise or Copy Filter

Click the Create New Filter button at the top of the screen. Click Revise to edit the filter. Click Copy to clone the filter, with the option to revise, and save it as a new filter.

**Tip:** Cloning makes it easy to create a filter with similar conditions.

Click Create new Filter from the shortcuts popup to open a blank Filter Builder. If you click Copy or Revise next to the filter name on the filter listing screen, Filter Builder will open with all the conditions listed for editing.

## Naming Filters

When naming a filter, choose a short description that will assist in its use. The name might describe the conditions contained in the filter, might identify the list or use other terms that will identify the list in a useful way.

Return to Filter listing

### Filter Builder

Filter Name

☐ Show as child tab  
☐ Show as parent tab

Result Panel						
	Contacts With No Link To Account	Contacts Linked To An Account	Total Contacts	Accounts With No Links to Contact(s)	Accounts Linked to Contact(s)	Total Accounts
Total Selected via This Filter						
Total Available in Database						

Mode:  
☒ Basic ☐ Detail

### Context and Field Name

*Context* selection dictates the location of the *Field Name*.

### Operators

The *Operator* compares the *Field Name* contents with the Value. Clicking the dropdown arrow will list your choices. The operator choices displayed will depend on the field name selected in the box to the left.

#### Operators for fields with alphabetic data:

*Is equal to* Looks for records that exactly match the value you select *Is not equal to* Looks for records that do not match the value *Starts with* Matches the initial character(s) you enter in the value field. *Contains* Matches a character string within the value you enter *Is Blank* Looks for records where the specified field is blank *Is not blank* Looks for records where the specified field contains any data

#### Operators for fields with numeric data:

*Is equal to* Field Name contents are equal to the number specified *Is not equal to* Does not equal the value, may be either greater than or less *Is greater than* Field Name contents are greater than the Value *Is less than* Field Name contents are less than the Value *Is blank* Field Name contains no data *Is not blank* Field Name contain data

## Operators for fields with dates

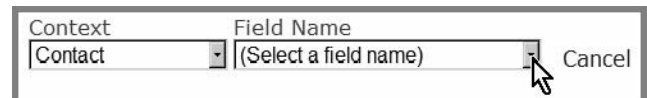
*Is greater than* Dates older than the date value entered

*Is less than* Dates more recent than the date value entered

## Value

The value box lets you type in the value that the field must match (or, most not match if you have chosen the “is not equal” operator). Lookup fields are a special case. Do not type in the value, instead select from the list of values by clicking on the dropdown.

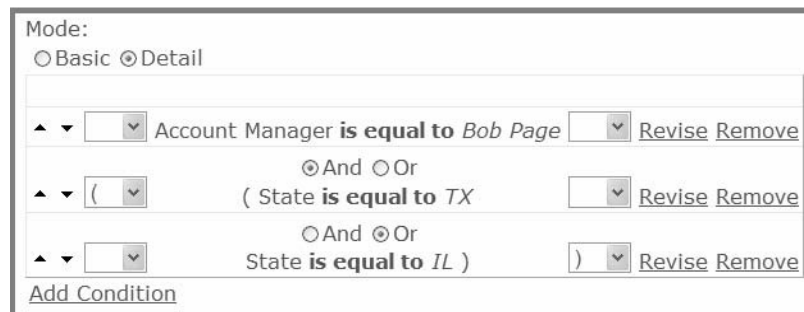
Pick an Operator and Value. The filter engine compares the Field Name to the Value, using the Operator as the relationship. **Click OK.** Adding more than one condition causes the engine to potentially return fewer matches.



The second and any successive lines will require use of the “And/Or” function. Filter Builder defaults to *Basic* mode, in which the use of *And* operator is implied. To use “Or” connector, you need to switch to *Detail* mode.

## Detailed Mode

*Detail* mode allows for advanced/complex filtering (compounding conditions). The *parentheses* and the *And/Or* operators become available.



## And/Or

The “And/Or” options do not show until you have two conditions. And/Or is used to connect condition lines.

Use “*And*” to create a sub-list of only those records that fulfill *both* conditions. This is the same as using *Basic mode*.

Use “*Or*” to retrieve those records that fulfill *either* of the condition independently.

The difference between “And” and “Or” becomes more pronounced when several lines are created. Multiple “Ands” will produce fewer records and multi-line “Ors” will return more records. Parentheses

Some filters use open and close parenthesis marks to control the order in which condition within the filter are evaluated. Nested, multi-level parentheses are permitted.

Operations within the innermost set of parentheses are evaluated first. Operations within the next level are evaluated next and then those in the outermost set of parentheses. Lastly, operations outside of the parenthesis are performed.

**Tip:** The number of open parentheses must match the number of close parentheses.

Call your assigned account manager at CCC if you need assistance on building multiline filters with parenthesis or other filter questions.

## Result Panel

This is a small box with the counts grid in the middle of the Filter Builder screen. After you add a query, the *Result Panel* displays six numbers. The *Result* number is how many records matched your filter. The *Total* number is how many records CorpCom filtered. It shows results for both Contacts and Accounts, including those linked and unlinked. During the writing and re-writing of filters, the grid can help you evaluate the desired results. This lets you see the effect of using various operators, parenthesis and conditions during a single filter writing session.

Note that this grid is the same one opened directly from the Filter Mgmt and Counts screen using the + sign operators.

Result Panel

	Contacts With No Link To Account	Contacts Linked To An Account	Total Contacts	Accounts With No Links to Contact(s)	Accounts Linked to Contact(s)	Total Accounts
Total Selected via This Filter	10	25	35	0	19	19
Total Available in Database	2,220	7,744	9,964	4,415	6,263	10,678

Mode:  
☐ Basic ☒ Detail

▲ ▼

(

▼

(Contact - City is equal to dallas )

▼

Revise Remove

Add Condition

## EXAMPLE Basic Filter

For this example, we need to create a filter that pulls all contacts that are in the city of Dallas. We are an account manager. Here's how we've set up this filter:

[Return to Filter listing](#)

**Filter Builder**

Filter Name  [Save](#)

☐ Show as child tab

☐ Show as parent tab

**Result Panel**

	Contacts With No Link To Account	Contacts Linked To An Account	Total Contacts	Accounts With No Links to Contact(s)	Accounts Linked to Contact(s)	Total Accounts
Total Selected via This Filter	10	25	35	0	19	19
Total Available in Database	2,220	7,744	9,964	4,415	6,263	10,678

Mode:  
☒ Basic ☐ Detail

[Revise](#) [Remove](#)

Add Condition

1. Type the *Filter Name*, e.g.: “Dallas Contacts”
2. Click *Add Condition* to add a condition line.
3. Select “*Contact*” from Context dropdown. Field Name appears. Chose which field in the record you want to match, which in this case is “*City*”.
4. Under Operator, select “is equal to”
5. Since *City* is a lookup type field, Value field shows a list of predefined *Cities*. Select “*Dallas*”.
6. Click OK to insert the condition into the list of conditions. Click *Revise* to edit it. Click *Cancel* at any time during condition selection to back up one step.

If you create a new filter or make any changes to an existing filter, remember to click the *Save* button to store it in the system.

We've successfully created the filter.

The *Result Panel* shows us that CorpCom searched a total of 9,964 records and found 35 that matched our query.

Result Panel						
	Contacts With No Link To Account	Contacts Linked To An Account	Total Contacts	Accounts With No Links to Contact(s)	Accounts Linked to Contact(s)	Total Accounts
Total Selected via This Filter	10	25	35	0	19	19
Total Available in Database	2,220	7,744	9,964	4,415	6,263	10,678

## EXAMPLE Advanced Filter

Now we need to find all of Mr. Page's contacts that reside in either the state of Texas of

Illinois. Make sure you are in *Detail* mode. Follow the first six steps outlined above. The next steps are to add two condition lines to specify Texas or Illinois contacts.

To add a condition line for State = “TX”:

7. Click *Add Condition* to add a condition line. Make sure to use an open parenthesis.
8. Select “Contact” from *Context*. Select “State” from *Field Name*.
9. Pick “is equal to” from *Operator*.
10. Since *State* abbreviation is used in this database, type “TX” in *Value* field. Click OK to insert the condition to the list.

Now we need to add another condition for State = “IL”.

11. Click Add Condition. Do NOT open with a parenthesis.
12. Select “Contact” from *Context*. Select “State” from *Field Name*.
13. Pick “is equal to” from *Operator*. Type “IL” in *Value* field.
14. Close the parenthesis opened in the previous condition with a closing parenthesis.
15. Since we want all Bob Page’s contacts that reside in EITHER the state of Texas or Illinois, make sure the connector between the last two condition lines is set to “Or”.

Mode:  
☐ Basic ☒ Detail

▲ ▼ [ ] Account Manager **is equal to** Bob Page [ ] [Revise](#) [Remove](#)

☒ And ☐ Or

▲ ▼ ( [ ] ( State **is equal to** TX [ ] [Revise](#) [Remove](#)

☐ And ☒ Or

▲ ▼ [ ] State **is equal to** IL ) [ ] [Revise](#) [Remove](#)

[Add Condition](#)

Note that the use of parentheses on the first condition line is optional.

Filter Name  [Save](#)

**Result Panel** [ ] [ ] [ ] [ ] [ ]

Result  
**10**

Total  
**138**

Mode:  
☒ Basic ☐ Detail

Account Manager **is equal to** Bob Page [Revise](#) [Remove](#)

and

( State **is equal to** TX [Revise](#) [Remove](#)

or

State **is equal to** IL ) [Revise](#) [Remove](#)

[Add Condition](#)

In the completed filter, CorpCom narrowed our results from 11 to 10.

## Action Lists

You may have a special project that requires you to compile a list of select Accounts/Contacts. While a filter allows you to pull out records based on specific conditions/patterns, Action lists provide a way to build a list of individually selected records.

To add a contact to an action list, go to the Contact Listing screen. Note the checkboxes to the left of each contact entry.

1. Click the checkbox next to any contact(s) you wish to add to the Action list.
2. In the top of screen button row click “Add selected records to Action List”
3. Use the Action List tab to view the newly added entries to your action list.
4. (If there is no Action List tab you must create one, instructions below)
5. To remove a record(s) from the action list, view the list using the Action List tab, click the checkbox(es) next to the record(s) you wish to remove, then click “Remove selected records from Action List” button in the top of screen row.
6. To clear the entire Action List, click the top row button “Clear my Action List”. This does not delete any records, but does remove their links to the action list.

**Action List Tab.** The Action List tab works like other tabs. To create or re-create this tab go to the Contact Detail or Account Detail screen, then click the “Listing of all Filters” bar. Navigate through the list of filters to a permanent one named “My Action List 1”.

Create tab. Click “Create Tab” to the left of the line holding My Action List 1. This will create a tab for the action list. The action list tab is highlighted and the resulting action list is also displayed.

The list does not make a copy of a record; rather it stores references to the actual records in CorpCom. Consequently, the reference is removed when you delete the record permanently from CorpCom. The Action list holds the references until you decide to remove the selected record or remove all records from the action list.

**” Tip:** If you are working on a new project, you may want to clear the Action List before adding a new set of select Accounts/Contacts to your new action list.



# THE REPORT WIZARD

Corpcom allows you to create various reports using pre-made templates. Below is a list of what each report will contain.

Address Listing	Name, title, company name, address, phone, email
Avery Listing	First name, last name, address, city, state, zip
Detail Listing	Name, title, company, address, phone, fax, email, owner, source, status, account mgr, group/subgroups, documents
Phone Listing	One line per record, name, company, phone, fax, email
List Distribution Sheet	Count totals by all group/subgroups and document codes
Note Listing	By name & date, a printout of notes in the notes section

Reports are available in Word (.doc), Rich text (.rtf), Plain text (.txt), and PDF (.pdf).

**Click *Manage Report Templates* in the Shortcuts menu to customize reports.**

Manage Report Templates

Report

...

Selected report (Format):

Selected sub-list (Count):











Sort order:

Result:

Report Wizard

Click one of the Output format icons to select the report template and format that you wish to generate. Click magnifying glass icon to view the document layout.

1 2

Report name and Output format	Report Type	Author	*
    Address Listing 2	Listing	Handoyo	
    Address Listing	Listing	Handoyo	

Click the icon to the right of *Author* to view a report *template*. This allows you to view the selected template in Word format.

**Click the icon of the preferred format. Click next.**

Report

...

Selected report (Format):

Address Listing 2  
(.DOC)

Selected sub-list (Count):

Sort order:

Result:

Report Wizard

Select the sub-list to populate the report template.

1 2 3 4 5

Filter Description	By	Date
Select _Master	CCCDemoIR	5/24/2007 8:48:00 PM
Select 10K	CCCDemoIR	5/9/2003 4:06:00 PM
Select 10K TEST	CCCDemoIR	6/5/2003 11:26:00 PM

Shortcuts

**Select the filter to use as the data source. Click Next.**

**Click the checkboxes in the order you wish the report to be sorted.**

For instance, if you want to sort a report by last name, then first name, check the first name checkbox, then the last name checkbox.

**Report** Shortcuts

Report Wizard

Check the field(s) you wish to use to sort. Select the fields in the order in which you'd like the list sorted.

**Account fields**

**Contact fields**

☒ Contact.Title ☒ Contact.City ☐ Contact.State  
☒ Contact.ZIP ☒ Contact.Country ☐ Contact.Phone  
☒ Contact.Ext ☐ Contact.Fax ☐ Contact.Email

**Click Finish.**

Large reports will be split into multiple files.

**Click the numbers below Result to download each part of the report.**

**Report** Shortcuts

Report Wizard

Check the field(s) you wish to use to sort. Select the fields in the order in which you'd like the list sorted.

**Account fields**

**Contact fields**

☒ Contact.City ☒ Contact.State ☐ Contact.Zip  
☐ Contact.Country ☐ Contact.Phone

Click on the batch number to download the report.

1 2

Previous Finish Start over

## Report Management

You can create, edit, and delete reports using the Report Management screen.

When creating a template there are a few simple guidelines to follow. Each report template must start with «TableStart:Record» and end with «TableEnd:Record».

Between these tags add the fields you want your report to display. They should be in the following format: «Context.Field Name».

Here are some examples.

«Contact.First Name»

«Contact.Middle Name»

«Contact.Last Name»

«Account.Company Name»

You can look at existing report layouts by clicking the icon to the right of the author.

Report Management

Shortcuts

1 2

Report name and Output format	Report Type	Author	*
<input type="checkbox"/> Address Listing 2	Listing	cccdemoir	
<input type="checkbox"/> Address Listing	Listing	cccdemoir	
<input type="checkbox"/> Avery 5160	Label	cccdemoir	
<input type="checkbox"/> Detail Listing By Group	Listing By Group	cccdemoir	
<input type="checkbox"/> Detail Listing	Listing	cccdemoir	

1 2

To upload a report template, browse and select the Word template that you wish to upload. Click Upload

Type of report  
☐ Listing ☐ Label & Letter ☐ Summary Page (Count, Stats) ☐ Letter ☐ Listing By Group

Does the template contain user-defined fields?  
☒ Standard and user-defined fields ☐ Standard fields ☐ User-defined fields

Once you have created your report template, upload it by clicking the browse button and locating the file.

**Choose the type of report using the radio buttons. Choose what type of fields the reports contains.**

**Click upload.**

Feel free to contact CCC is you need assistance creating report templates.

Delete reports by clicking the checkbox next to the report and click Remove Selected Report Templates under the shortcuts menu.

# CALENDAR ACTIVITIES

## ***Calendar Overview***

*You'll use the Calendar to track upcoming meetings (events), store commentary (notes), and as a reminder system.*

*Daily View* shows you calendar activities listed by hour.

**Click a day on the mini-calendar to switch days, and click an hour to create a new event or explore an existing one.**

*Weekly View* displays each weekday and any scheduled activities.

**Click on a day to open the event planner for that day.**

*Monthly View* gives you a traditional calendar display.

**Click on a day to open the event planner for that day.**

*Listing View* displays a listing of Events and Notes in chronological order.

**Click on view to display the details for a particular event.**

## ***Event Types***

There are three types of calendar entries.

*Events Scheduled* are used to schedule a meeting or phone call notes. Events are normally used in a shorter fashion for describe an upcoming activity for the calendar. Although the event will have one of the predefined subjects that you click in from the list, you may type in a longer description in free form style.

*Notes* can be any length and used for any subject. Notes are used to type-in any desired information in free-form style. Text or data from various Windows applications such as Word or Excel may be pasted into the note using the clipboard. Your formatting will not carry through; the data is stored as text. Although notes are stored by date, they are not meant to be used as a calendar entry for the future. Future calendar items are called events.

*Journal* entries keep a record of your communications. It can track everything sent to a prospect so you are able to inspect the journal of what they have received. Journal entries are automatically added when you do a fax or email broadcast.

## ***Reminders***

The calendar utility includes a reminder system to notify you via email of an upcoming event. The reminder time may be set from a range of a few minutes to a few days of the event. The reminder is sent to your default email address or to an email address that you enter into the reminder utility.

Recurring events may also be scheduled for various intervals and time horizons.

Use the *Event Planner* to schedule appointments.

## Click Calendar ► Add Activity

Daily view
Weekly view
Monthly view
Add activity
Add batch entry
Delete selected records

### Activity - List View

#### My Activity Listing

---


Event Planner
Save

Type: Event ▼

**General**

Appointment ☒ Private
Subject -Unassigned- ▼
Start Time 03/19/2012 08 00 AM Local time
End Time 03/19/2012 08 30 AM Local time
Description Meeting with prospective client

**Linked to record:**

Activity linked to Contact record: 
Search context ☒ Account ☐ Contact
Type name to search aabc View Results


Select	AABC Sample Company	Dallas

Select *Private* to hide it from the *All records* list. Set *Start time* and *End time* to reflect when your event will begin and end.

*Linking* your event to an account or contact adds it to the record detail screen.

Linked to Account [AABC Sample Company]

Activity linked to AABC Sample Company 

**To remove the link, click the *broken link* icon.** *This removes the event from the record detail screen.* 

With *Reminder* enabled, you'll get an e-mail at the specified *Within-time* before the event start time. If you set a *Recurrence*, you'll be reminded for each one.

**Tip:** set up an e-mail account that automatically forwards or CC's to a group of people and put that address in the *Deliver to* box. Result: everyone on the list receives event reminders from CorpCom.

Linked to Account [AABC Sample Company]

**Reminder**

Options ☐ Enable

Within 5 Minutes ▼

Deliver To

**Recurrence**

Options ☒ Enable

Every Second ▼ Week ▼

☐ End After 0 occurrences

☒ End By 12/21/2007

Shortcuts Save

*End after* creates that many instances of the event. End by copies up to the selected date. **Click save at any time to save**

After your event is saved, you may edit it at any time. *Update ALL Occurrences* applies the edit to all copies you generated with *Recurrence*, while *Update this Event* applies the edit only to this instance. *Delete* will remove all occurrences of the event.

Update ALL Occurrences Update this Event Delete This Event

Last Modified by C43CCC on 3/19/2012 3:30:59 AM

## Journal and Communication Log

*Journal* displays logs of changes to user-defined fields. Your administrator must enable this feature. *Communication Log* tracks e-mail and fax broadcast activity.

**Contact Detail**

Edit Contact

Update Delete

Created on 3/16/2012 9:04:00 AM

Last modified by C43CCC on 3/16/2012 12:05:00 PM

Account [AABC Sample Company]

Contact [Bill Aable]

**Agenda**

☒ Event ☐ Note ☐ Journal ☐ Communication Log New Entry

Date/Time	Subject	Description
3/19/2012 2:30:00 PM	-Unassigned-	Journal Example
3/16/2012 2:30:00 PM	-Unassigned-	Meeting

## INSPECT DUPLICATE ACCOUNTS

To assist with managing your data you can use the Inspect Duplicate Accounts section to find duplicate accounts and consolidate the information.

When you first access this section you will be shown a list of all the duplicate accounts in your database. These accounts are considered duplicates if the names are exactly the same.

### Remove Duplicates

Select any two records to view them side by side and determine if you want to consolidate the accounts.

Compare Records

### Account

# of Records/page: 50

Page 1 of 48

1 of 48

	Company Name
Detail	ABC
Detail	ABC
Detail	Smart Smiths
Detail	Smart Smiths

Select two accounts by checking the checkbox next to the name.

Click on the Compare Records button and you will see both accounts information listed side by side. This is where you can choose to copy information from one account to the other and update the information in one account and remove the other account.

<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Pane 1</b></span> <div> <span>Update</span> <span>Delete</span> </div> <div>             Created on 3/19/2012 12:05:00 PM              Last modified by C43CCC on 3/19/2012 12:05:00 PM           </div> </div>		<div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>Pane 2</b></span> <div> <span>Update</span> <span>Delete</span> </div> <div>             Created on 3/19/2012 12:05:00 PM              Last modified by C43CCC on 3/19/2012 12:05:00 PM           </div> </div>	
<div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc;">Account [Example Company]</div> <div style="padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Add</span> <div>Move Contacts</div> </div> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="width: 45%;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Link(s):</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Contact: Example, Son</div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Company Name</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Example Company</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Response</div> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Owner</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">-Unassigned-</div> <div style="font-size: 0.8em;">▼</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Source</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Email</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Phone</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Ext</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Fax</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-Address 1</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-Address 2</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-City</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-State</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-ZIP</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-Country</div> </div> <div style="width: 50%;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">2148675309</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Send Email</div> </div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;">Remarks</div> </div> </div> </div>		<div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc;">Account [Example Company]</div> <div style="padding: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Link(s):</div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Company Name</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Example Company</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Response</div> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Owner</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">-Unassigned-</div> <div style="font-size: 0.8em;">▼</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Source</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Email</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Phone</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Ext</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Fax</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-Address 1</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-Address 2</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-City</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-State</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-ZIP</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AC-Country</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;">Remarks</div> </div> </div>	
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <b>Display In Pane 2</b>  <div>Select</div> </div> <div> <b>Company Name</b>              Example Company           </div> </div>		<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <b>AC-City</b>              Example Company           </div> <div> <b>Phone</b>              Example Company           </div> <div> <b>Fax</b>              Example Company           </div> <div> <b>Email</b>              Example Company           </div> </div>	
Total Records: 1			

To transfer contacts from one account to the other you can use the *Arrow*

*Buttons* located between the two panes. This will allow you to safely move the contacts over into the correct account before deleting the duplicate. Finish by clicking update to save all changes.

Note: If you choose to delete an account any contacts linked to that account will also be deleted.



# MANAGING AN E-MAIL BROADCAST

## Campaign Management Screen

The frame in the center of the screen displays the *Job Number, Status, Release Date/Time, and Campaign Description*.

Each e-mail campaign has a unique *Job Number*, which will expand to show the results of an e-mail, i.e. the number of successful, opened, and blocked e-mails.

**Click *Summary* next to the job number to get a detailed breakdown of the campaign results.**

*Scheduled/Immediate Releases* displays all submitted e-mail jobs.

**Click the *Test Run/ Drafts* to display all submitted test e-mails.**

Any job that has been placed on hold will be displayed when *On Hold Campaigns* is selected. **Click *Cancel* to delete the campaign or *Resume* to continue the campaign.**

Campaign Management - Email				
View				
<input type="radio"/> Scheduled/Immediate Releases <input type="radio"/> Test Run/Drafts <input checked="" type="radio"/> On Hold Campaigns <input type="radio"/> Recurring Campaigns				
		Status	Created Date/Time	Broadcast Description
Cancel	Resume	On Hold	3/19/2012 1:11:49 PM	Test

Recurring campaigns are displayed when you click the *Recurring Campaigns* radio button.

Click *Remove* to permanently delete the recurring campaign. Click *Load* to start a new e-mail using the campaign template.

## E-mail Options

The Opt-out line, the refer-a-friend opt-in line, and the physical address line can all be customized. **Mouse-over *E-mail Options* in the top right hand corner of the screen and click on a selection to navigate to the *Campaign Template* menu.**

**Click the link you wish to customize from the *Link Type* dropdown list.**

**Click *Create new* and enter the new link text in the provided HTML or TEXT editors. Click *Save* when you are finished.**

Campaign Template - Email

Link Type 

Select one  
Select one  
Opt-out link  
Physical address link  
Refer-a-friend link

Default Opt-out line  
To manage your s  
http://www.corpo  
{Address}.

Text Version:  
http://www.corpo  
{Address} To ma

Create new

TEXT Editor

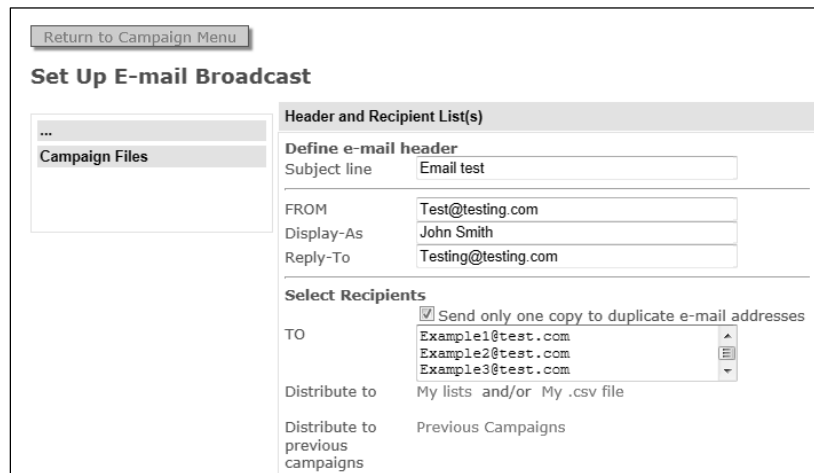
Save

Cancel

# SENDING E-MAIL BROADCASTS

## Preparing an E-mail Campaign

When preparing an e-mail campaign, the files and lists that you choose are displayed in the info window.



First, fill out the information under *Header and Recipient List(s)*.

## Define E-mail Header

**Type the *Subject Line* for your e-mail.**

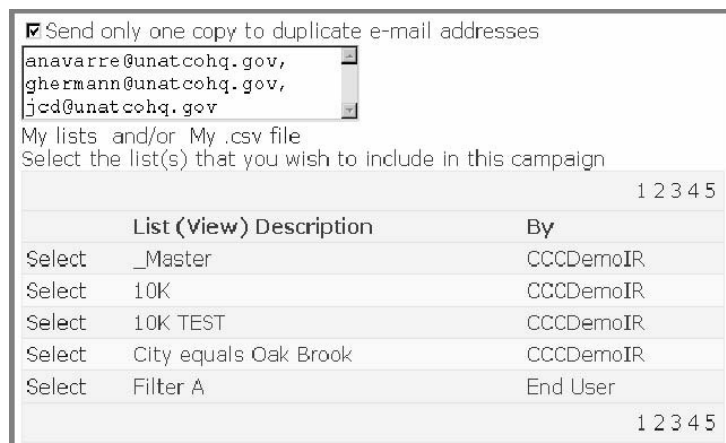
*FROM* is the e-mail address that the recipient will see the e-mail originating from.

*Display-as* is the name that is will be displayed as the sender.

*Reply-to* is the e-mail address that a recipient's responses will be sent to.

## Select Recipients

Click the check box beside *send only one copy to each recipient* if you wish to dedupe your list.



Manually enter e-mail addresses by entering them in the text box provided, inserting a comma between each entry.

**Click *My Lists* to use a list that you have in CorpCom. Click *Select* next to each list you wish to use for your e-mail. To use a list in .csv format, Click *My .csv file*.**

Step 1b: Map the fields that you wish to use in

☒ First row contains field names

Source fields	Destination fields
<a href="#">Click here to Map</a>	Record ID
<a href="#">Click here to Map</a>	E-mail Address (required)
<a href="#">Click here to Map</a>	Display-As
<a href="#">Click here to Map</a>	ColumnC
<a href="#">Click here to Map</a>	ColumnD
<a href="#">Click here to Map</a>	ColumnE
<a href="#">Click here to Map</a>	ColumnF
<a href="#">Click here to Map</a>	ColumnG
<a href="#">Click here to Map</a>	ColumnH
<a href="#">Click here to Map</a>	ColumnI

[Done](#)

**Click *browse* and choose a .csv file. Click open and upload.**

*Note:* you must map the fields in your .csv file now. E-mail Address is the only required field.

If the first row of your .csv file contains column names, click the checkbox at the top of the mapping section.

For each destination field, choose the correct column from the dropdown list. For example, to map the e-mail address, click the drop down box next to “E-mail Address” and choose the e-mail.

You can also limit the recipients of your fax to those that have or have not received one of your previous broadcasts.

**Click *Previous Campaigns* next to *Limit scope to...***

Choose *received* or *did not receive* from the dropdown box and choose the appropriate campaign(s).

## E-mail Message Body

**Message Body**

Specify source of e-mail message

☐ Upload e-mail message from my computer. You may upload .htm and/or .txt from your computer.

☒ Compose new e-mail message

---

Compose your e-mail message below. Press 'F12' to toggle between full and normal window. Click 'Save Message' button when you are finished"

Css Class: Normal Times New Roman 3 (12pt)

**B I U** [Text formatting icons]

Please join me in welcoming our newest field operative, JC Denton.

☒ Normal ☐ HTML

**Click the *Upload e-mail message from my computer* radio button to upload an html body. After choosing the .htm file, click *upload*.**

**Click the *Compose new e-mail message* radio button to type in your e-mail message directly into the text box.**

## Attachments

The screenshot shows a web interface for adding attachments. It has three main sections: 'Header and Recipient List(s)', 'Message Body', and 'Attachment'. The 'Attachment' section is active and contains the following elements: a heading 'Insert files (optional)', a text instruction 'Browse your computer for the attachment document to insert', a 'File name' text input field, a 'Browse...' button with a mouse cursor pointing to it, a 'File format' dropdown menu currently showing 'Choose One', and an 'Upload' button at the bottom.

Click **browse** and find the document you want to attach. After choosing a document, select the file format from the dropdown list and **click upload**. Repeat this process for each document.

Click the *Preferences* bar when you're done.

## Preferences

CorpCom offers a default *opt-out line* that is added to the bottom of the e-mail by default. If you have your own opt-out line in the body of the e-mail you can choose *Insert my own opt-out ink* from the drop-down.

You can add Corporate Communications Center's postal address or your own address by choosing the option from the *Postal address* drop-down.

A *Forward-to-friend link* can be added to your e-mail so that the recipient can easily share your e-mail with others. They will be given a link that allows them to be added to the distribution list.

The screenshot shows the 'Attachment' section with a 'Preferences' sub-section. It includes the following settings: 'Subscription management options' with dropdowns for 'Opt-out link †' (Default Opt-out line), 'Postal address †' (Default Physical Address line), 'Forward-to-friend link' (N/A), and 'Update Profile link' (N/A). A note below states: '† CAN-SPAM compliance: select one if you do not have your own address included in the message body.' The 'HTML e-mail tracking options' section has checkboxes for 'Track:' with 'Open rate' and 'Click-thru rate'. The 'Submission options' section includes a 'Reference Code' field, 'E-mail confirmation to' (fax@corpcom.com), 'Owner' (-Unassigned-), and a 'Save as template ‡' checkbox (unchecked) with the text '(only on immediate/scheduled launch mode)'. A footnote at the bottom reads: '‡ This job can be stored as a template for future releases. Use campaigns'.

## HTML Tracking

CorpCom can track which recipients open your e-mail and what links within your e-mail they follow. Enable these options by clicking the *Open rate* and *Click-thru rate* checkboxes.

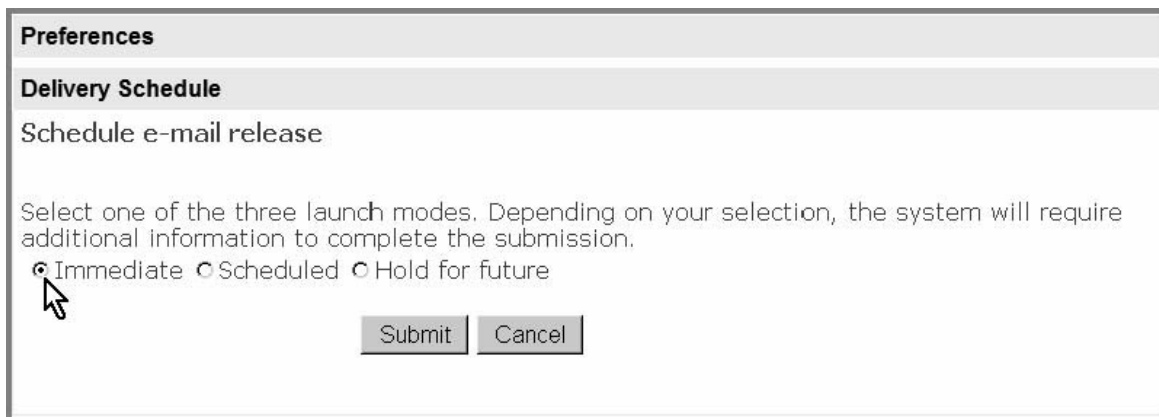
## Submission Options

The *Reference Code* is the description used when viewing the list of previous e-mail broadcasts.

When you submit an e-mail broadcast, a confirmation e-mail is sent to the address you enter here.

Selecting the owner for a job allows you to track who submitted the broadcast.

If you use the same layout for an e-mail multiple times, try saving a template. Click the checkbox if you wish to create a template for the current job.



The screenshot shows a 'Preferences' dialog box with the 'Delivery Schedule' tab selected. The title bar says 'Preferences'. Below the tab, the text 'Schedule e-mail release' is displayed. A paragraph of text reads: 'Select one of the three launch modes. Depending on your selection, the system will require additional information to complete the submission.' Below this text are three radio button options: 'Immediate' (which is selected), 'Scheduled', and 'Hold for future'. A mouse cursor is pointing at the 'Immediate' radio button. At the bottom right of the dialog are two buttons: 'Submit' and 'Cancel'.

## Delivery Schedule

There are three e-mail scheduling options:

- 1 **Immediate** submits the e-mail as soon as you click **Submit**.
- 2 **Scheduled** allows you to choose a submission date beforehand.
- 3 **Hold** suspends your job until you resume. Access suspended jobs via the **On Hold Campaign** screen.

## MANAGING A FAX BLAST

### ***Campaign Management Screen***

The frame in the center of the screen displays the *Job Number*, *Status*, *Release Date/Time*, and *Campaign Description*.

Each fax blast has a unique *Job Number*, which will expand to show the results of a fax, i.e. the number of successful or undeliverable faxes.

**Click *Details* next to the job number to get a detailed breakdown of the campaign results.**

*Scheduled/Immediate Releases* displays all submitted fax blasts.

**Click the *Control Copies* radio button to display all submitted test faxes.**

Any job that has been placed on hold will be displayed when *On Hold Campaigns* is selected.

**Click *Cancel* to delete the campaign or *Resume* to continue the campaign.** Recurring campaigns are displayed when you **click the *Recurring Campaigns* radio button.**

View				
<input type="radio"/> Scheduled/Immediate Releases <input type="radio"/> Control copies <input type="radio"/> On Hold Campaigns <input checked="" type="radio"/> Recurring Campaigns				
		Status	Created Date/Time	Campaign Description
Remove	Load	Template	10/23/2007 11:43:17 AM	test

**Click *Remove* to permanently delete the recurring campaign. Click *Load* to start a new fax blast using the selected template.**

# SENDING FAX BROADCASTS

## Preparing a Fax Blast

When preparing a fax blast, the files and lists that you choose are displayed in the info window.

**Clicking the Recycle Bin icon removes incorrect lists or files.**

First, fill out the information under *Header and Recipient List(s)*.

List (View)	Description	By
Select	_Master	CCCDemoIR
Select	10K	CCCDemoIR
Select	10K TEST	CCCDemoIR
Select	City equals Oak Brook	CCCDemoIR
Select	Filter A	End User

## Define Fax Header

*Campaign Name* will be used as the description displayed when viewing the listing of previous faxes.

*FROM* will be displayed at the header of the fax.

## Select Recipients

Click the checkbox beside *send only one copy to each recipient* if you wish to dedupe your list. To manually enter fax numbers, enter them in the text box with a comma between each entry.

Click *Managed Lists* to use a list that you have in CorpCom. Click *Select* next to each list you wish to use for your fax.

☒ Send only one copy to duplicate fax number

5151155511, 3215469807

Managed Lists and/or .csv file upload  
 Step 1a : Press "Browse" button to locate computer, then click "Upload"

Step 1b: Map the fields that you wish to use

☐ First row contains field names

Source fields	Destination fields
<a href="#">Click here to Map</a>	Record ID
<a href="#">Click here to Map</a>	Fax number (required)
<a href="#">Click here to Map</a>	Display-As
<a href="#">Click here to Map</a>	ColumnC
<a href="#">Click here to Map</a>	ColumnD
<a href="#">Click here to Map</a>	ColumnE
<a href="#">Click here to Map</a>	ColumnF
<a href="#">Click here to Map</a>	ColumnG
<a href="#">Click here to Map</a>	ColumnH
<a href="#">Click here to Map</a>	ColumnI

[Done](#)

You can also upload lists in the .csv file format.

**To use a list in .csv format, click *.csv file upload*.**

**Click browse and choose a .csv file. Click open and upload.**

*Note:* you must map the fields in your .csv file now.

If the first row of your .csv file contains column names, click the checkbox at the top of the mapping section.

For each destination field, choose the correct column from the dropdown list. For example, to map the fax number, the drop down box next to "Fax Number" and choose the fax number.

You can also limit the recipients of your fax to those that have or have not received one of your previous broadcasts.

**Click *Previous Campaigns* next to *Limit scope to...***

Choose either "received" or "did not receive" from the dropdown box and choose the appropriate campaign(s).

**Fax Blast**

Shortcuts

Header and Recipient List(s)

**Fax Documents**

Fax body files  
 Browse your computer for the Fax document to include

File name:  [Browse...](#)

File format: [Choose One](#)

[Upload](#)

**Click the *Fax Documents* bar.**

## Fax Body Files

**Click *browse* to choose the document(s) you want to fax.**

After choosing a document, select the file format from the dropdown list and click upload. Repeat this process for each document, uploading them in the order you want them to be sent, i.e. the first document you upload will be the first document to come out of the recipients fax machine.

**Once you have finished uploading your document(s), click the *Preferences* bar.**



<b>Header and Recipient List(s)</b>	
<b>Fax Documents</b>	
<b>Preferences</b>	
<b>Opt-out</b> The law requires that you have a 24 hour, toll free opt-out number on your document. As part of our fax services, we provide the following opt-out line with option code exclusively assigned to you. For more info, please contact support at 888-760-6034 or email fax@corpcom.com.	
To remove your fax number from our distribution list, please call 877-422-2867 Option Code 2701	
<b>Transmission options</b>	
Resolution	Standard ▾
Paper size	Letter ▾
<b>Submission options</b>	
Owner	-Unassigned- ▾
E-mail confirmation to	fax@corpcom.com
Save as template ‡	<input type="checkbox"/> (only on immediate/scheduled launch mode)
‡ This job can be stored as a template for future releases. Useful for repetitive/recurring campaigns	

## Opt-Out

Each fax should have an opt-out number and pin at the bottom. Keep in mind that this opt-out line must be added manually.

## Transmission Options

There are two resolution options for your faxes: *standard* and *fine*. Standard is sufficient for most faxes but fine resolution may be necessary if there are detailed pictures in your document. If you're not sure, send yourself a test using standard resolution. If it doesn't look clear, try another test using fine resolution.

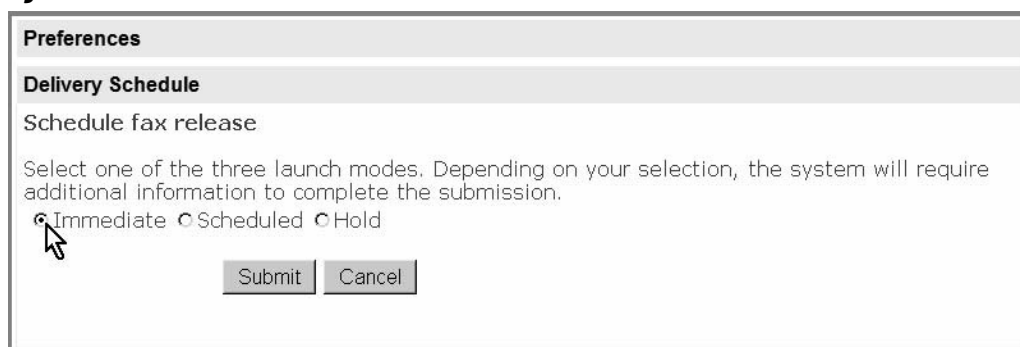
You may also choose the paper size needed for your fax, either *Letter* or *Legal*.

## Submission Options

Selecting the owner for a job allows you to track who submitted the broadcast. When you submit a fax, a confirmation email is sent to the address you enter here. If you use the same layout for a fax many times, it may be useful to save a template.

**Click the checkbox if you wish to create a template for the current job.**

## ***Delivery Schedule***

A screenshot of a software window titled "Preferences". Inside, there is a sub-section titled "Delivery Schedule". Below this title is the text "Schedule fax release". A paragraph of instructions follows: "Select one of the three launch modes. Depending on your selection, the system will require additional information to complete the submission." Below the text are three radio button options: "Immediate", "Scheduled", and "Hold". The "Immediate" option is selected, and a mouse cursor is pointing at it. At the bottom of the window are two buttons: "Submit" and "Cancel".

**Preferences**

**Delivery Schedule**

Schedule fax release

Select one of the three launch modes. Depending on your selection, the system will require additional information to complete the submission.

☒ Immediate ☐ Scheduled ☐ Hold

There are three fax scheduling options:

- 1 *Immediate* submits the fax as soon as you click *Submit*.
- 2 *Scheduled* allows you to choose a submission date beforehand.
- 3 *Hold* suspends your job until you resume. Access suspended jobs via the *On Hold Campaign* screen.

## **ORDER FULFILLMENT**

### ***Order Status***

**Click a letter (A-Z), or [All].** CorpCom displays records that contain the index field beginning with the selected letter.

The list displayed will show the Order Status, Order Number, recipients name, company, and order date.

**Click *Manifest* to view a detailed list of items in the order.**

### ***Inventory Listing***

**Click a letter (A-Z), or [All].** CorpCom displays records that contain the index field beginning with the selected letter. A list of all items and quantities is displayed.

### ***Fulfillment Leads***

**Click a letter (A-Z), or [All].** CorpCom displays records that contain the index field beginning with the selected letter.

A list of leads is displayed. **Click *Import* next to each lead that you want to add to your database as a new contact.**

## YOUR PASSWORD

We store your CorpCom password in a secure database using industry-standard encryption. You are the only person who knows your password and we cannot retrieve it. Making a strong password is one of the easiest and most effective ways of protecting your data.

### ***Strong Passwords...***

are *at least* 8 characters long. You may use *up to* 50.

do *not contain* your name, company name, computer logon username, pet name, birthday, or any other piece of information that anyone could easily find out about you.

do *not contain* complete words you could find in the dictionary.

are *fundamentally different* from other passwords you are using or previous passwords you have used. If you use the same password for your e-mail account, computer logon, CorpCom login, etc., a thief only needs one password to compromise *all of your data*.

use a *combination* of...

- . UPPERCASE and lowercase letters ( A-z )
- . Numbers ( 0-9 )
- . Punctuation and other Symbols ( \$,%,\*,~,@... )

### **Strong Passwords Made Easy**

#### ***EXAMPLE***

1. Think of a sentence or phrase. Make it *strange* or *bizarre* in some way and you'll find it hard to forget.

**The Milky Way Galaxy Loves Blue Orange Juice**

2. Take the first letter of each word and mix upper and lowercase.

**tMwGlBoJ**

3. Add a number you can remember to both sides.

**1984tMwGlBoJ4891**

4. Your password is now stronger than average and very difficult to compromise. You can make it practically airtight by adding a few special characters. Do a final check and make sure it meets our “best practices” criteria and you’re **done**.

### ***Changing Your Password***

When you log in for the first time, you'll be prompted to change your password, and you may do so at any time thereafter. As you enter characters for your new password, our system will report its strength level.

**Click My Profile ► Password.**

## Resetting Your Password

Click *Forgot Password*

You'll see a unique six-character security code to prevent an accidental reset. If you can't read it for any reason, just *refresh the page* in your browser.

**Enter the code, your username, click submit.**

You'll be asked to answer the *security question*\* that you submitted when you first logged in. You'll receive an e-mail from support@corpcom.com with your new password, randomly and securely generated by our system.

When you log in with your temporary password, you will be prompted to change it.

\*If you can't remember the answer to your security question, you won't be able to reset your password automatically. You may call us at 888-760-6034 toll-free during regular business hours and we'll assist you.

If it's after hours, send an e-mail to support@corpcom.com and we'll contact you with further instructions.

## Personalization

Click My Profile ► Personalization.

The screenshot shows a web application interface. On the left is a sidebar with a 'Security and Settings' menu. Under 'My List', 'My Profile' is highlighted. The main content area is titled 'My Profile' and contains a 'Personalization' section. This section includes a dropdown for 'Default Time Zone' set to '(GMT -06:30)', a text instruction about time zones, and two sets of radio buttons for 'Default Layout' (DefaultLogin, Default) and 'Default Theme' (Brown).

Security and Settings	
My Profile	
Logout	
My List	
Start	
Contact Listing	
Account Listing	
Import and Export	
Filter Management	
Reporting	
Calendar	
Inspect Duplicate Accounts	
Communications	
Fax Blast	
E-mail Campaign	

### My Profile

#### Personalization

Please set the default value according to your local time zone. All references to date/time information throughout the application is based on this value.

Default Time Zone

Select from the available layouts and themes to show a personalized look and feel throughout the application.

Default Layout ☐ DefaultLogin ☒ Default

Default Theme ☐ Brown

Set your default time zone. All timestamps in CorpCom are based on your selection. You may also change layout and theme. *Layout* determines where the navigation menu is anchored while *theme* selects a color combination and a graphic across the top.

The last option in My Profile is *e-mail*. If your e-mail address changes, update it in CorpCom *immediately*.

The screenshot shows the 'Security Question' page, specifically the 'E-mail' section. It contains a text instruction about temporary passwords, and three input fields for 'Current e-mail', 'New e-mail address', and 'Re-type e-mail', all containing the value 'enduser@corpcom.com'. A 'Save' button is at the bottom.

### Security Question

#### E-mail

Your temporary (reset) password or all other mail below.

Current e-mail

New e-mail address

Re-type e-mail

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## ***Support Information***

**Telephone** (regular business hours)  
(888) 760-6034

**E-Mail**  
support@corpcom.com

# CORPORATE **COMMUNICATIONS** CENTER, INC.

4030 Harry Hines Blvd. Dallas, TX 75219

(214) 871-2941

1-888-760-6034

**[www.corpcom.com](http://www.corpcom.com)**