2

Organisations & Contacts

All data pertaining to businesses and people, is centrally located in the Organisation section of PRIMO.

The Organisation record has four or five pages:

- Address page: contains the organisation's address, SIC codes, attributes and contacts linked to it (e.g. employees). The address page also contains internal information such as, the status of the record (e.g. whether it is still "Active"), the agent responsible for the record, remarks written about the record, etc.
- Virtual Fields page: this page only appears if your Program Administrator has created virtual fields for the Organisation section (cf.section entitled “Virtual Fields“, Chapter 15, “Administration“, page 15-6).
- Properties page: lists all properties linked to this organisation record.
- Requirements page: lists all requirements linked to this organisation record.
- Activities page: lists activities linked to this organisation record, such as phone calls, meetings, to-dos, histories, memos, letters, OLE documents, etc. The activity list can be filtered to show only those activities specific to properties or requirements linked to the organisation record.

If your Program Administrator has created virtual fields for the Organisation section, a page containing these virtual fields is automatically inserted into the organisation record.

Similarly, if your Program Administrator has created virtual fields for the contact section, a page containing these virtual fields is automatically added to the contact record. To view virtual fields for a contact, open a contact record from the list found on the Address page of the Organisation record.

Creating an Organisation Record

1. In this section you will learn how to create an Organisation record.
2. Open the "Data" menu or click on the "New" icon on the icon menu bar and select "Organisation" from the "New" sub-menu.

   The following window will open:

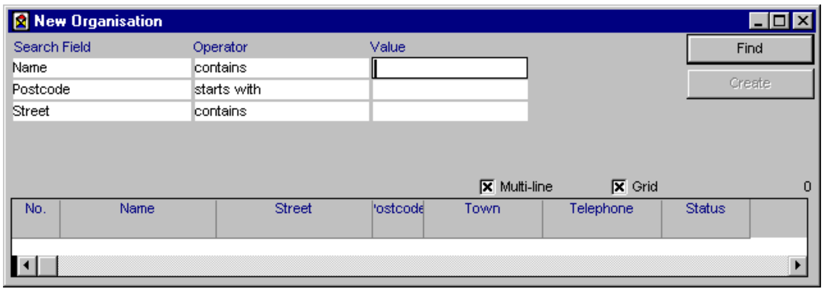

Fig. 2-1: “New Organisation” Window

   In order to prevent duplication, you must first search the PRIMO database to make sure that the organisation record you wish to create does not already exist. You can search the database using the following preset search criteria:

   Name: Input the name of the organisation you're looking for. The search is not case sensitive. In general, entering one word is more than enough.

   Postcode: If the organisation you are looking for is a common one, enter the Postcode to narrow the search.

   Street: Enter the street where the organisation is located if, for example, you can not remember the organisation’s name.

3. Click on the "Find" button.

   Any organisation that matches your search criteria is listed in the list section of the window. The number at the top right of the list shows the number of records found.

   Check to see if any of the records listed below happens to be the organisation you were intending to create. If you are uncertain about any record, you may open it in order to view it in more detail.

➔ **Tip:**
To add a contact to an organisation record, do not create a new organisation record. Instead, open the organisation record you wish to add a contact to, and add the contact from there. For more information on how to add a contact to an organisation record, see the section entitled “Creating, Deleting and Editing Contacts“ in this chapter, page 2-10.

✓ **Prerequisite:**
You have concluded your search and the organisation record you wish to create does not exist in the PRIMO database.

4. Click on the "Create" button.

A blank Organisation record will open:

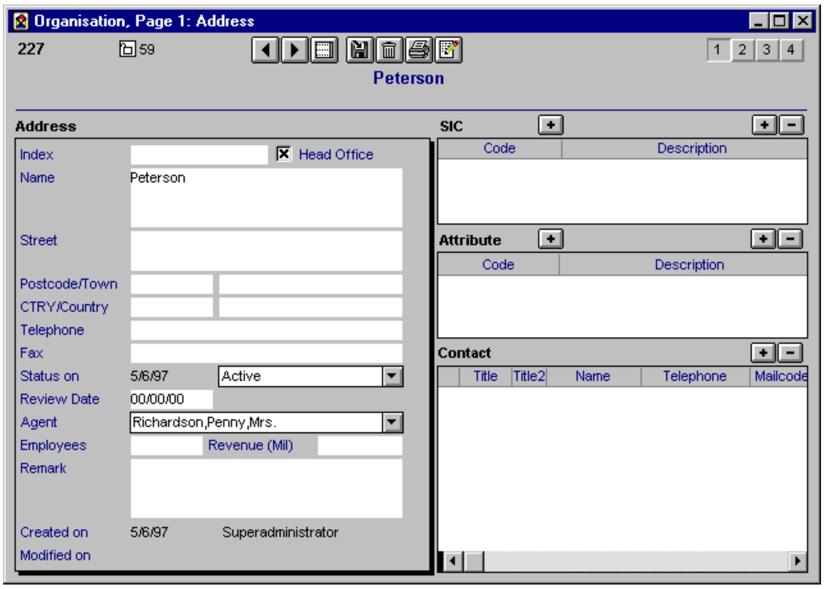

Fig. 2-2: Window: "Organisation: Address page"

The Address page of the Organisation record is divided into five sections:

The **Record Header** contains the record toolbar with icons such as the delete, save, print and new letter icons. (Cf. section entitled "Record Headers", Chapter 1, "Basic Functions", page 1-12). Under the record icon bar is the title bar which shows the organisation's name, phone number and mail recipient once this information has been entered.

The **Address** section contains the name, address, telephone numbers and other information pertaining to the organisation. Additional information may be added in the Remark field.

The **SIC Code** section contains the code on the left and the description on the right. (Cf. section entitled "Adding and Deleting SIC Codes" in this chapter, page 2-6).

The **Attribute** section gives you the possibility of assigning user-defined attributes to an organisation. The attribute code is on the left, the description on the right. (Cf. section entitled "Adding and Deleting Attributes" in this chapter, page 2-8).

The **Contact** section contains a list of contacts associated with the organisation (usually employees).

➔ **Tip:**
To see more information regarding a contact (e.g. contact's extension or fax number), either widen the organisation record window, use the scrollbar at the bottom of the contact section, or open the contact record. For more information on how to add, delete and process contact records, see the section entitled “Creating, Deleting and Editing Contacts“ in this chapter, page 2-10.

A description of each individual text field comes next.

Organisation: Address page

This section explains how to enter information into the following sections of the Address page of the Organisation record:

- the address,
- SIC Codes,
- Attributes,
- Contacts

Any additional functions are described in the section entitled “Special Options“ in this chapter, page 2-13.

Entering the Address

The address that applies to both the organisation and any contact associated with the organisation is entered in the left side of Organisation: Address page. To enter information in the address section, proceed as follows:

✓ **Prerequisite:**
You have created a new organisation record and a window entitled "Organisation, page 1: Address" is open.

Input data into the address fields by tabbing from field to field.

The fields have the following meaning:

Index: Give the organisation a short name that you can use when searching for this record. With big organisations, use their standard acronym (e.g. IBM), for other corporations, use the most appropriate part of the name (e.g. last name for organisations that use a person's name).

Name: Enter the organisation's full name in this field. Pressing the enter key will begin a new line in the Name field.

Street: Enter the street address or post office box in this field. Pressing the enter key will begin a new line in the Street field. Do not enter both the street address and post office box in the Street field, since these two addresses may have different postcodes. If you wish to enter both addresses, enter the one not used for mailings in the "Remark" field.

Postcode/Town: Enter the postcode in the field on the left and the town in the one on the right.

CTRY/Country: Enter the country code (e.g. USA) in the field on the left and the country spelled in full (e.g. United States of America) in the field on the right.

➔ **Tip:**
PRIMO automatically remembers postcodes and country codes. If you enter a postcode that PRIMO already knows and tab to the next field which is the "town" field, PRIMO will enter the name of the town automatically. The opposite is also true. If you do not know the postcode affiliated with an address, but do know the town, enter the town then tab back (Shift + tab) to the postcode field. If there are several postcodes available for a town, you will be given a list to choose from. You can also enter the postcode manually.

Country codes and countries are work the same way.

Telephone: Enter the organisation's main phone number. You should also enter the town/area code. For example: 0171 123 4567.

Fax: Enter the organisation's main facsimile number. Enter the number as described above.

⚠ **Important:**
Make sure the facsimile number is entered correctly, or you will have problems with automatic faxing when that capability is enabled in a later version of PRIMO.

Status: PRIMO automatically enters "Active" in the status field when you create an organisation record. All organisation records that are currently being used are given an "Active" status. To change the status of a record from "Active" to "Inactive" or "Archived", click on the down arrow in the status field and select another status. Some PRIMO versions also have a status entitled "Mailings" (cf. section entitled “Record Status“, Chapter 1, “Basic Functions“, page 1-36).

Whenever a status is changed, the date of this change is automatically saved in the date field on the left of the status field. This date cannot be modified. When you first create a record, the date beside the automatically entered "Active" status will be that of the record’s creation date.

Review: Clicking in this field will open a pop-up calendar: For more detailed information on the review option see Chapter 8, “Review Dates“.

Agent: When you create an organisation record, your name is automatically entered into this field, as PRIMO assumes you are the person responsible for this record. You may select another agent from the drop down list.

Employees: Enter the number of employees working for the organisation in this field.

Revenue (Millions): Enter the organisation's revenue in this field (e.g. 30.0 = 30 Million)

Remark: Write any remarks you may have about the organisation in this field. You may also enter a second address in this field if you wish (since no virtual fields are provided for a second address).

Created on: Your name and the date are automatically inserted in these fields when you create a new organisation record. This information cannot be modified manually.

Modified on: Your name and the date are automatically inserted in these fields when you save the organisation record you have just created. Each time a user modifies this record, the date the record was modified and the name of the user who modified the record will automatically be entered in the "Modified on" fields. This information cannot be modified manually.

➔ **Tip:**
If you cannot see the “Created on” and “Modified on” fields, use the scrollbar on the right of the Address section to scroll down to those fields. (You may also increase your window size.)

The following illustration shows the Address page of a completed Organisation record:

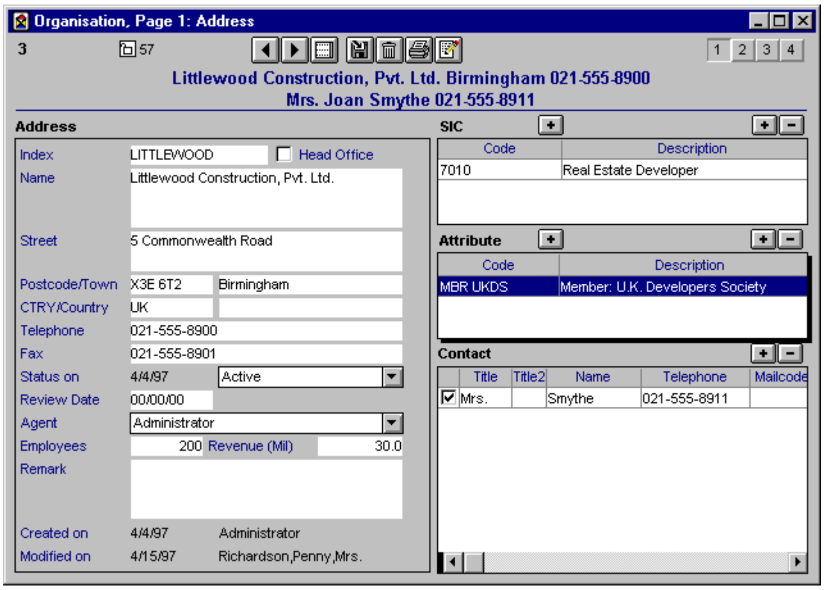

Fig. 2-3: Completed Organisation record: Address Page

Adding and Deleting SIC Codes

➔ **Tip:**
You can add your own SIC codes to PRIMO (cf. section entitled “Branchencode“, Chapter 15, “Administration“, page 15-18). Upon request, Eisen & Partner GmbH can import a standard list of SIC Codes into your database.

SIC codes and their descriptions are displayed in a list on the upper right-hand-side of the Organisation Address page. The following examples describe how to link SIC codes to an organisation.

Example A:

To search for SIC Codes by code, click on the plus icon located above the “Code” field of the SIC Code section.

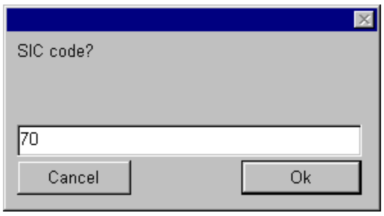

Fig. 2-4: Enter SIC Code Dialogue Box

Example B:

To search for SIC Codes by description, click on the plus icon located above the "Description" field of the SIC Code section.

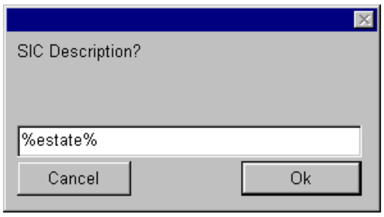

Fig. 2-5: Enter SIC Description Dialogue Box

Whether you search for SIC Codes by code or by description, both the code and the description will be displayed in the SIC Code section. An organisation record can have more than one SIC Code.

If you do not know the SIC code or description you are looking for, click on one of the plus icons and click on “OK”, and PRIMO will list all available SIC Codes. Since there may be thousands of SIC Codes, it may be better to narrow your search by using jokers (cf. section entitled “Searching Using the Joker Symbol“, Chapter 1, “Basic Functions“, page 1-31).

When you use jokers to search for a SIC Code, PRIMO will give you a list of industries that fit your search for you to choose from. As an example we searched for all SIC Codes whose description contained "%estate%. We obtained the following results:

Fig. 2-6: Dialogue Box showing SIC Code search result

Select the SIC Code you wish to add to the SIC Code section and click on "OK". If you enter the exact SIC code, it will automatically be added to the list without displaying the dialogue box.

To delete a SIC code from the SIC Code section, select it and then click on the minus icon located above the "Description" field of the SIC Code section.

Adding and Deleting Attributes

➔ **Tip:**
Adding and deleting attributes is handled in same way SIC Codes are handled. The only difference being that attributes are determined by your Program Administrator and are not necessarily industry-specific like SIC Codes. (Cf. section entitled “Merkmale bearbeiten“, Chapter 15, “Administration“, page 15-20).

Attribute codes and their descriptions are listed on the middle right-hand-side of the Organisation Address page. The following examples describe how to add attributes.

Example A:

To search for an attribute by code, click on the plus icon located above the "code" field of the Attribute section.

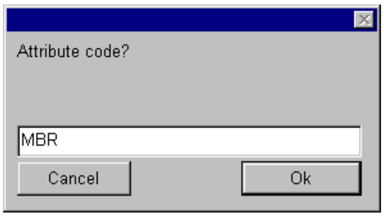

Fig. 2-7: Enter Attribute Code Dialogue Box

Example B:

To search for an attribute by description, click on the plus icon located above the "description" field of the Attribute section.

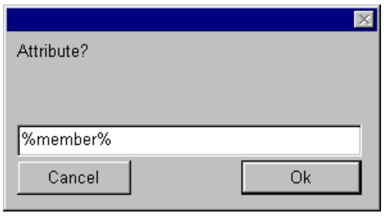

Fig. 2-8: Enter Attribute Description Dialogue Box

Whether you search for attributes by code or by description, both the code and the description will be displayed in the attributes list. An organisation record can have more than one attribute entry.

If you do not know the code or description you are looking for, click on one of the plus icons and click on “OK”, and PRIMO will list all available attributes. Since there may be thousands of attributes, it may be better to narrow your search by using jokers (cf. section entitled “Searching Using the Joker Symbol“, Chapter 1, “Basic Functions“, page 1-31).

When you use jokers to search for an attribute, PRIMO will give you a list of industries that fit your search for you to choose from. As an example we searched for all attributes whose description contained "%member%. We obtained the following results:

Fig. 2-9: Dialogue Box showing Attribute search result

Select the attribute you wish to add to the attribute section and click on "OK". If you enter the exact attribute code, it will automatically be added to the list without displaying the dialogue box.

To delete an attribute from the attributes section, select it and then click on the minus icon located above the "Description" field of the attributes section.

Creating, Deleting and Editing Contacts

The Contact section is located in the lower right-hand-side of the Organisation record Address page. A check-mark next to a contact's name signifies that this is the "mail recipient" for this organisation. This contact therefore becomes the default person to send mail to (you may have more than one "mail recipient"). The check-box next to a contact's name is the only editable field in the Contact section. To edit any other aspect of a contact record, you must open that record.

⚠ **Important:**
Don't accidentally check or uncheck the "mail recipient" check-box (e.g. when clicking in the row with the mouse, avoid clicking on the check-box)

To add a contact to the Contact section of the Organisation Address page, click on the plus icon located above the Contact section. This will open a blank Contact record.

To delete a contact from the Contact section, select it and click on the minus icon located above the Contact section. Contacts linked to properties or requirements cannot be deleted. If you need to delete a contact record, you must first delete it from the property or requirement records it is linked with. Or better still, replace it with another contact (cf. section entitled "Property: Contact Section", Chapter 3, "Properties", page 3-7 and section entitled "Requirement: Address page", Chapter 4, "Requirements", page 4-6).

To see a contact's record in detail, double-click on the contact's row. Or if you prefer using the keyboard, select the row and then press F2.

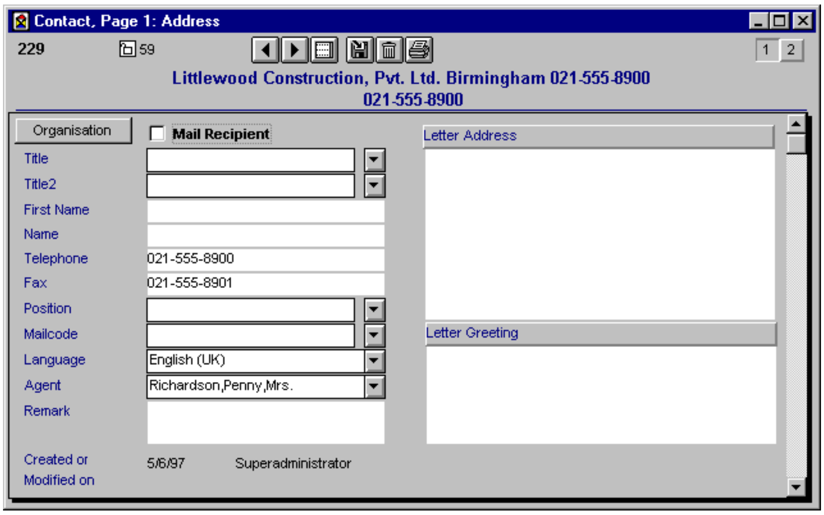

Fig. 2-10: Blank Contact Record

The Contact record is divided into three sections:

- Record Header
- Contact Information
- Mailing address and greeting

Located below the record header icon bar is the title bar containing the organisation's name and phone number and the contact's name and phone number. This information is automatically displayed into the title bar once it has been entered in the information section of the Contact record.

Clicking on the "Organisation" button located in the upper left corner of the contact record window, will take you to the Organisation record this contact is associated. The contact record will remain open in the background.

Enter information regarding your contact as follows:

Mail Recipient: By default, the first contact added to the organisation is checked as the "mail recipient". However, you can change this selection by checking the "mail recipient" check-box for the contact(s) you wish to choose as your "mail recipient". Your "mail recipient" should be the person(s) you'll be corresponding with the most often. Selecting a "mail recipient" considerably simplifies the composition of address lists for mailshots (cf. section entitled “Special Options“ in this chapter, page 2-13).

The principal mail recipient for an organisation is the one that appears in the title bar of the Organisation record.

➔ **Tip:**
The "mail recipient" check-box is the only field that can be edited both in the Contact record and in the Contact section of the Organisation record.

Title 1: Enter the contact's title (e.g. Dr., Mr., Mrs., Miss, Lord).

Title 2: Enter the contact's second title or qualifications (e.g. Ph.D, D.Ed, M.D.).

First Name: Enter the contact's first name.

Surname: Enter the contact's last name/surname.

Telephone: The organisation's main telephone number is automatically entered into this field when you add a contact to an organisation. You may add the contact's extension to this number or type in a new one if necessary.

Fax: The organisation's main fax number is automatically entered in this field when you add a contact to an organisation. If the contact has a different fax number, type it in manually. Since future versions of PRIMO will allow direct faxing, it is important to use a standardised format when entering fax numbers.

Position: Choose the contact's position within the organisation from the drop down list.

Mailcode: Choose a mailcode from the drop down list (for more information on mailcodes cf. section entitled “Special Options“ in this chapter, page 2-13). For an explanation on how to add mailcodes, see the section entitled “Modifying Item Lists“, Chapter 15, “Administration“, page 15-15.

Language: Choose the language that the contact speaks from the drop down list. PRIMO uses this information when creating the contact’s mailing address and greeting (cf. section entitled “Mailing Lists“, Chapter 11, “Mailings“, page 11-6). The default language is UK English. However, Eisen & Partner, GmbH can install additional languages upon request.

Agent: When you create a new contact record, your name is automatically entered into this field, as PRIMO assumes you are the person responsible for this record. You may select another agent from the drop down list.

Remark: Enter any information you wish regarding the contact in this field (e.g. private telephone number, car phone, e-mail address). The type of information you would enter into the Remark field would not be covered by virtual fields (if any have been added).

Editing A Contact's Mailing Address and Greeting

For every contact record you create, you must supply the contact's mailing address and greeting. This is the information that is used by PRIMO whenever you write a letter, do a mailshot or send an offer.

➔ **Tip:**
The procedure for an organisation with no contact is explained in the section entitled “The “No-Name” Contact“ in this chapter, page 2-14.

PRIMO generates three different address and greeting formats from which you can choose:

- **Formal**

  Mr. James Godfrey
  President, Godfrey & Associates
  65 Somerset Place
  London W1E 3T2

- **Informal**

  Mr. James Godfrey
  65 Somerset Place
  London W1E 3T2

- **Married Couple**

  Mr. and Mrs. James Godfrey
  65 Somerset Place
  London W1E 3T2

1. Click on the button entitled "Letter Address" located above the address text field.

   The following pop-up menu opens:

Fig. 2-11: “Address Format” Pop-up Menu

2. Select an address format from the pop-up menu.

PRIMO automatically enters the contact address information into the text field below the "Letter Address" button using the format you have selected.

3. Click on the "Greeting" button.
4. Select a greeting format from the open pop-up menu.

   PRIMO automatically enters the contact information necessary to formulate the greeting you have selected.

➔ **Tip:**
To modify the address and greeting formats PRIMO automatically generates, simply enter the appropriate field and edit the text.

Clicking on the "Organisation" button will take you back to the Organisation record without closing the Contact record or saving any data you have entered. To close the Contact record, proceed as explained in Chapter 1, “Basic Functions“. To save data you have entered in the Contact record, click on the diskette icon on the Record Header Icon Bar. If you have not saved any changes at the time of closing the Contact record, a dialogue box will open asking if you would like to save the changes you have made. Click on "OK". PRIMO will save the changes and then automatically close the record

⚠ **Important:**
PRIMO will not let you close or save a Contact record if you have not supplied a mailing address and greeting for that contact.

➔ **Tip:**
PRIMO does not automatically generate a formatted address or greeting for a contact record, since there are three formats to choose from. Also, having to select a format yourself enables you to verify the address and greeting and to make any necessary changes.

Once you've saved and closed the new contact record, it will appear listed in the Contact section of the Organisation Address page.

To edit a contact record, select it from the Contact section list and double-click on it or press F2.

To delete a contact from the Contact section of the Organisation record, Address page, select it and click on the minus icon (or click on the Contact record’s trash icon on the Record Header Toolbar if the Contact record is open). The contact will disappear from the contact section list. You cannot delete contacts that are linked to properties or requirements. You would have to assign another contact to those properties or requirements before being able to delete the contact record.

Special Options

The Contact record contains several special options.

Mailcode

The Mailcode option gives you the possibility to make a note of what type of information or mailshot a contact should get on a regular basis. Let's assume your organisation produces monthly market reports that you would like to send to specific contacts: You could create a mailcode entitled "R" for "Report" and apply that code to each appropriate contact record. When you need to send out the market reports, you would only need to search for all contacts with the mailcode "R". To learn how to create mailcodes, see the section entitled “Modifying Item Lists“, Chapter 15, “Administration“, page 15-15.

Mail Recipients

The first contact that you add to an Organisation record will automatically be checked as that Organisation's "mail recipient". As you add contacts to the Organisation record's Contact section, you can choose to change the default "mail recipient" and/or have more than one "mail recipient". However, only the first contact checked as a "mail recipient" will be mentioned in the Organisation record's title bar.

The “No-Name” Contact

If you do not know the name of a contact at an organisation, you may address correspondence directly to the organisation. To do this, enter the term "Sir/Madam" into the name field. Do not enter anything into the Title1 and Title2 fields. Select the formal address format from the “Letter Address” pop-up menu, and select the formal greeting from the “Greeting” pop-up menu. Do not forget to check this "no-name" contact as a "mail recipient" so that you may search for it when you wish to do a mailshot.

This option of creating a "no-name" contact allows you to send a mailshot to an organisation at the same time as you're sending one to several contacts. In this way, you do not need to do two mailshots, one for organisation records with no contacts (using "Organisation" layout), and one for organisation records with contacts (using "Contact" layout). For more information on mailshorts, see the section entitled “Mailing Lists“, Chapter 11, “Mailings“, page 11-6.

Contact, Additional Page: Virtual Fields

The Program Administrator can add an additional page containing virtual fields to the Contact section (cf. section entitled “Virtual Fields“, Chapter 15, “Administration“, page 15-6). The Program Administrator can use any of the virtual fields available to him/her and can set up the virtual fields page to look the way he/she wants. An illustration of this follows:

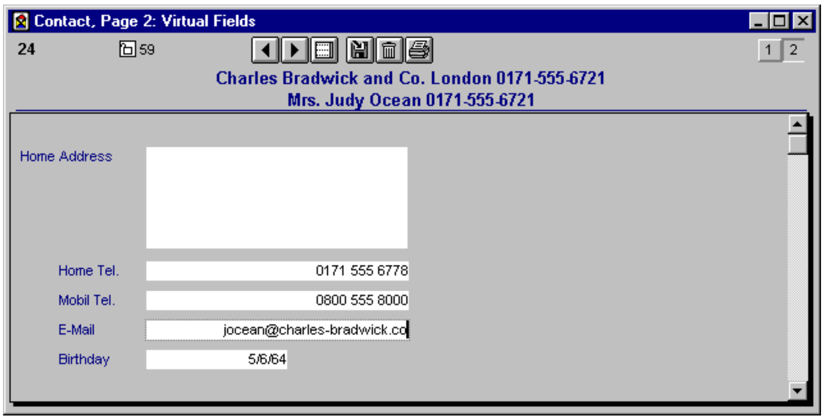

Fig. 2-12: Contact: Virtual Fields page*(Example)*

This page may look completely different in your version of PRIMO, since it is created by your Program Administrator. The fields that appear in this illustration may not appear on your virtual fields page.

Organisation: Virtual Fields page

The Program Administrator can insert an additional page containing virtual fields into the Organisation section (cf. section entitled “Virtual Fields“, Chapter 15, “Administration“, page 15-6). The Program manager can use any of the virtual fields available to him/her and can set up the virtual fields page to look the way he/she wants. For an example of what a Virtual Fields page may look like, see Figure 2-12 above.

Organisation: Properties page

Property records linked to the Organisation record are listed on this page. From here you can open any linked property record, and can even create a new property record which will automatically be linked to the Organisation record. For more information regarding creating property records see the section entitled “Creating Property Records“, Chapter 3, “Properties“, page 3-3.

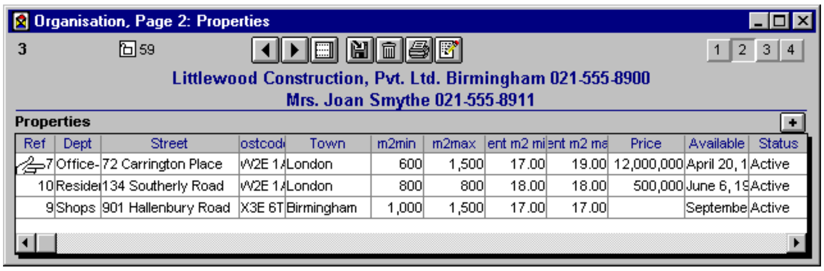

Fig. 2-13: Window “Organisation: Properties page“

The list displays the following basic information about each property record:

- Property record number
- Department
- Address
- Available surface
- Rent price and Purchase price
- Date available
- Property status
- Agent responsible for record

➔ **Tip:**
To modify a property record listed on the Properties page of the Organisation record, you must open it.

To open a property record in a list, select the one you wish to open and double-click on it or press F2.

To create a new property record, click on the plus icon located above the Properties list.

You can sort the properties listed on the Properties page of the Organisation record. For an explanation on how to sort lists, see the section entitled “Sorting Lists“, Chapter 6, “Lists“, page 6-12.

Organisation: Requirements page

Requirement records linked to the Organisation record are listed on this page. From here you can open any linked requirement record, and can even create a new requirement record which will automatically be linked to the Organisation record. For more information regarding creating requirement records see the section entitled “Creating Requirement Records“, Chapter 4, “Requirements“, page 4-2.

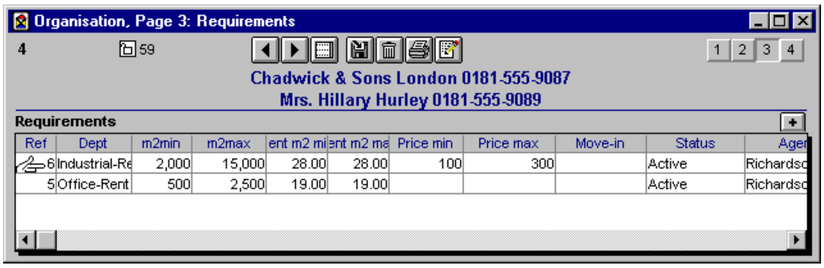

Fig. 2-14: Window “Organisation: Requirements page

The list displays the following basic information about each requirement record:

- Requirement record number
- Department
- Surface required
- Offered rent price and sale price
- Date available
- Requirement status
- Agent responsible for record

➔ **Tip:**
To modify a requirement record listed on the Requirements page of the Organisation record you must open it.

To open a requirement record in a list, select the one you wish to open and double-click on it or press F2.

To create a new requirement record, click on the plus icon located above the Requirements list.

You can sort the requirements listed on the Requirements page of the Organisation record. For an explanation on how to sort lists, see the section entitled “Sorting Lists“, Chapter 6, “Lists“, page 6-12.

Organisation: Activities page

The last page of the Organisation record lists all activities linked to this organisation record, such as phone calls, meetings, to-dos, histories, memos, letters, OLE documents, etc.

From here you can open any linked activity record, and can even add an activity record to the Organisation record. For more information regarding creating activity records see Chapter 5, “Activities“.

You can sort the activities listed on the Activities page of the Organisation record. For an explanation on how to sort lists, see the section entitled “Sorting Lists“, Chapter 6, “Lists“, page 6-12. Furthermore, several filters are available to reduce the list of activities to those you are interested in.

There are several filters you can choose from. For example, you can start by reducing the list of activities to only those pertaining to a certain property linked to the Organisation record. You can then further reduce the list to activities of the type "History". This particular example demonstrates how you could inform a client about offers concerning a specific property they have listed with you.

The Activities page is always located on the last page of a record (Organisation, Property and Requirement), and works the same way for all records. The only difference being the choice of filters from one type of record to another. For a more detailed explanation of the Activities page, see the section entitled “The Activities page for Organisation, Property and Requirement Records“, Chapter 5, “Activities“, page 5-2.