

How to add a contact to StoneWorks

The following is the procedure for entering a contact.

When entering a contact, please be sure to check to see if the contact already exists before entering as a new contact. If contact already exists, you can review the information and make any necessary updates to the file. If needed, a duplicate copy of the contact can be made that allows you to add another person to the same company or allows you to change the address information if necessary. After the contact has been entered into the system, an ID number will be automatically assigned to that contact. When looking for an existing contact, you can look it up by name, address or ID number. If contact does not exist in system, then proceed with entering information as a new contact.

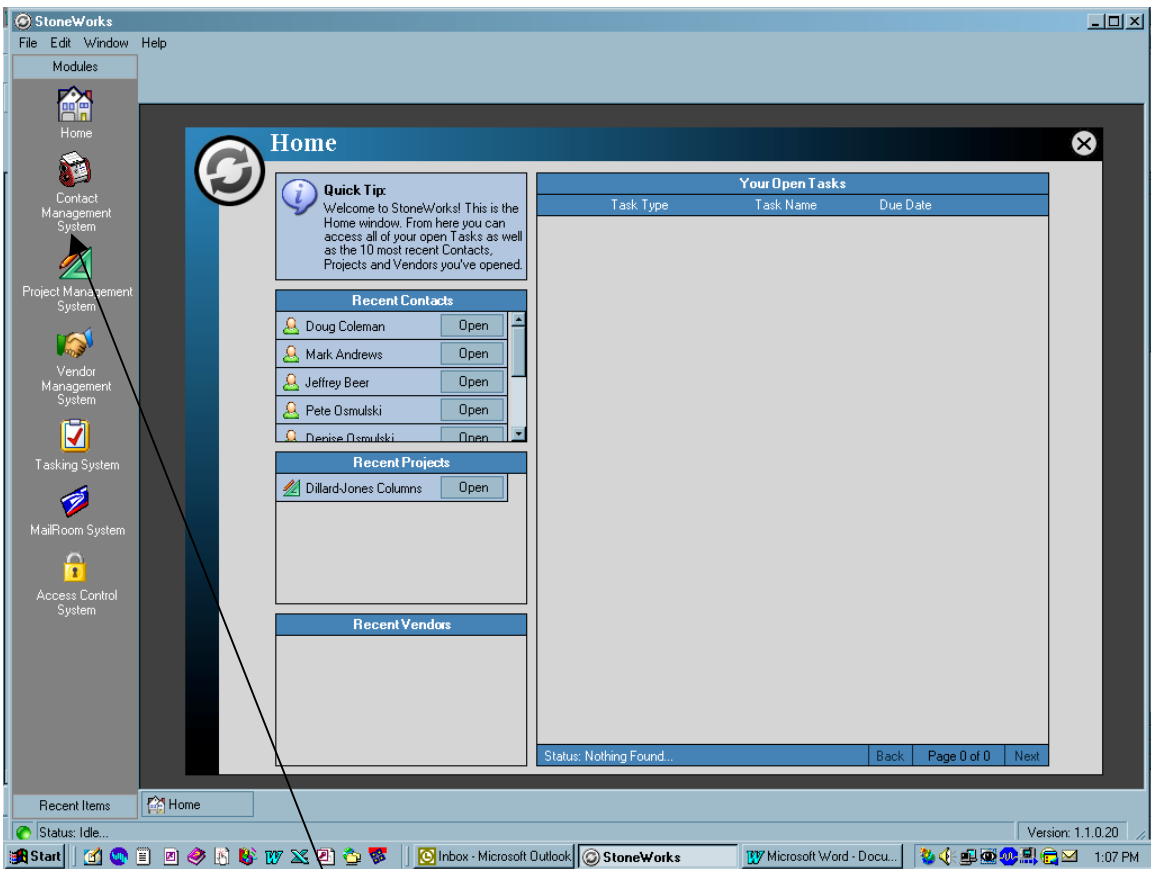
Here are some additional points to keep in mind while entering new contacts:

Duplicate check:

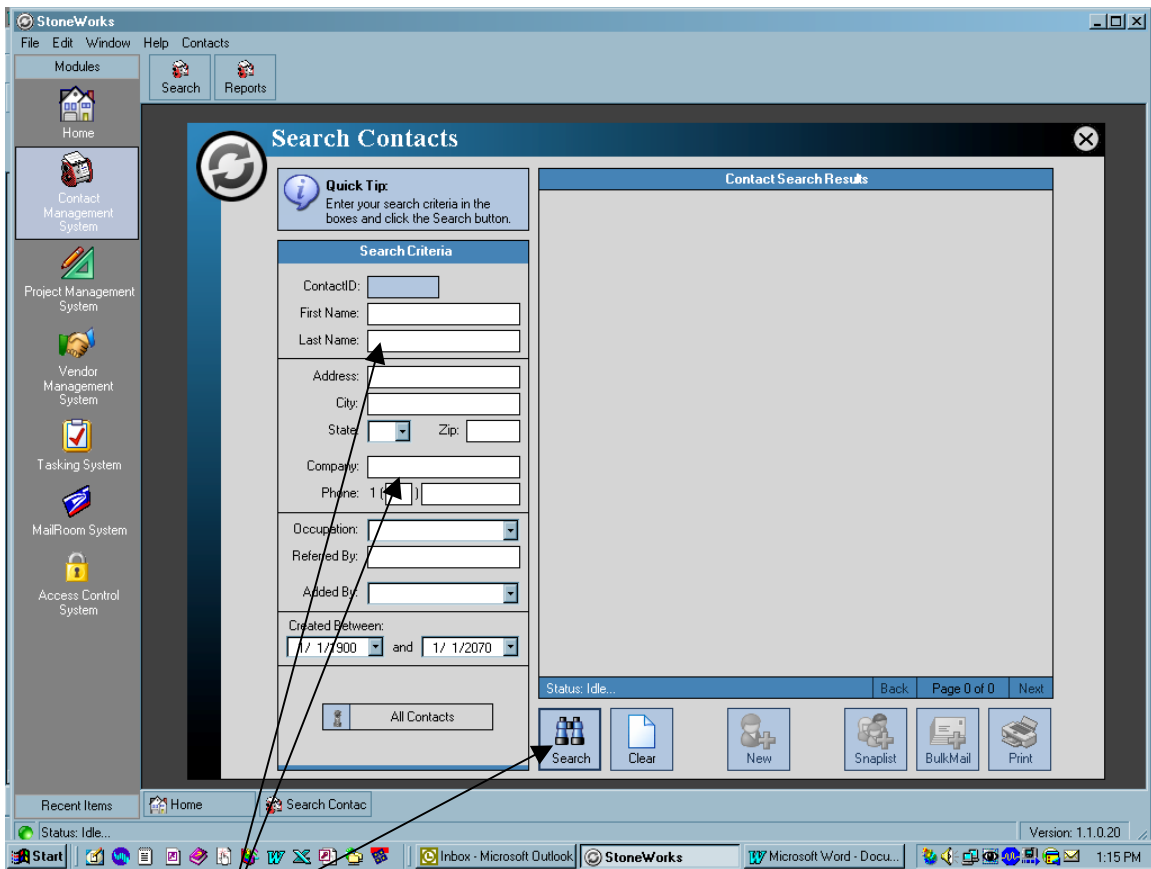
- Enter minimal information for the duplicate check.
 - Only the last name, or the first part of the name of a company.
- Please check carefully and diligently for duplicates. There are far too many in the database. Minor differences in data entry can result in the same person or company being entered several times. Take the time to check alternate spellings and perhaps based on the city only. This is not to avoid sending out catalogs, but to keep all contact information together.
- If you get a lot of matches, enter the state code, using the State Code list to make sure you have the correct code

Company names:

- Do not enter any name as starting with “The.” When searching, try both with and without “The” to verify no duplicates. If you find any with “The,” please delete the first word. Too many companies get buried that way and we have many duplicates.
- Do not enter any foreign addresses (including Canada and Mexico) in Contacts, unless you have a compelling reason. If we FedEx them catalogs, we need their FedEx account number, or a credit card number with expiration date, and be sure to indicate “Bill Recipient” on the Fed Ex form (we accept Visa, MasterCard or Discover only – no American Express). A physical, U.S. address is also required – no P.O. Boxes. Do **NOT** enter their credit card number into the database, as this is a privacy issue. (UPS is not an approved vendor, and we prefer FedEx if possible. UPS charges us to come to our property for any pickup.)
- Do **not** use punctuation in entering company names in the database. When entering a company name that includes initials, do not use periods or spaces between the initials. For instance, it would be CSCS – not C.S.C.S. or C S C S.



From StoneWorks HOME page, enter Contact Management System

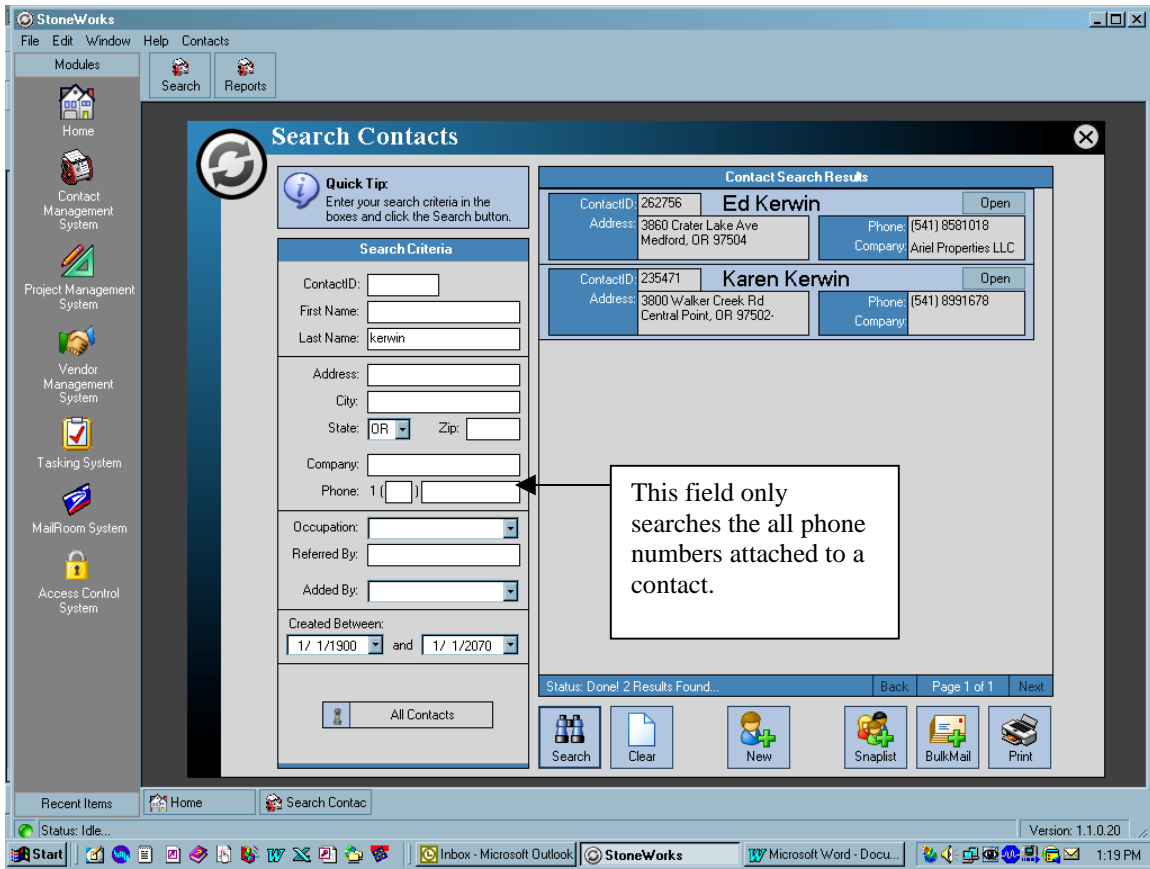


Enter the new contact name and "Search"

1. Enter **last name** of end user or part of **company name** if for a company.

NOTE: Be aware that minor variations can result in duplicates not being found – too much information entered in the screen narrows the search too much. So, enter Jones Arch NOT Jones Architecture, Inc.

2. If a large number of contacts come up with last name or company name, enter the **state**. Then press search again to narrow the field.
3. Be careful, sometimes both husband and wife will call at different times. If Mary Smith is at the same address as John Smith, do not enter separate contacts for both – one will do.



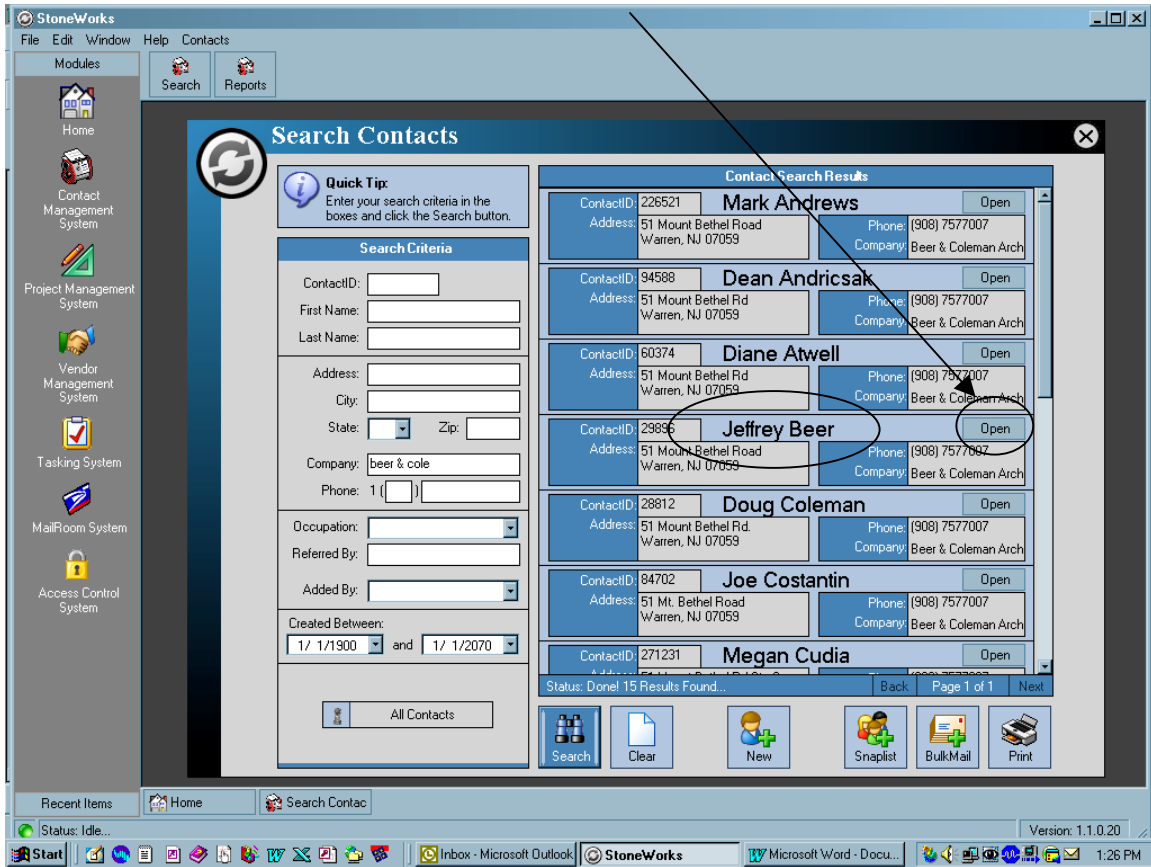
In this particular case we are entering Kerwin by last name and state only. The search pulled up both Ed and Karen.

If neither Ed nor Karen is the right contact, you can now enter your new contact information – you can not do this until after you have searched for duplicates (either by a different spelling or such).

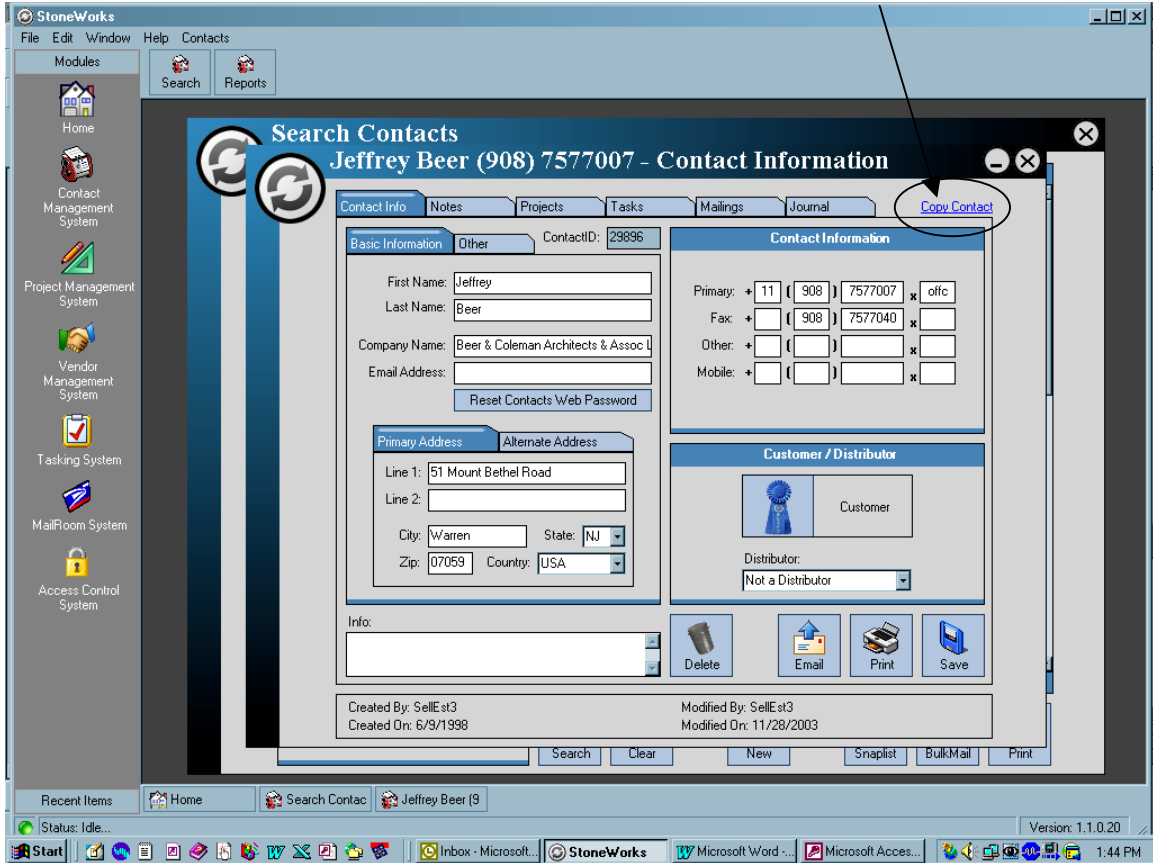
If you want to enter a new contact from scratch, **stay on this screen** to make entering information easier. Fill all fields down thru “occupation” before pressing NEW and skip to page # 8 to continue with directions.

If you want to make a duplicate from an existing contact, see pages 5 thru 7.

If you are searching **company names** and the correct company comes up, but not the person you need – you can save time by using the “copy contact” feature. Pick any contact for the appropriate company, after you have confirmed the mailing address. Hit “OPEN” to open that contact.

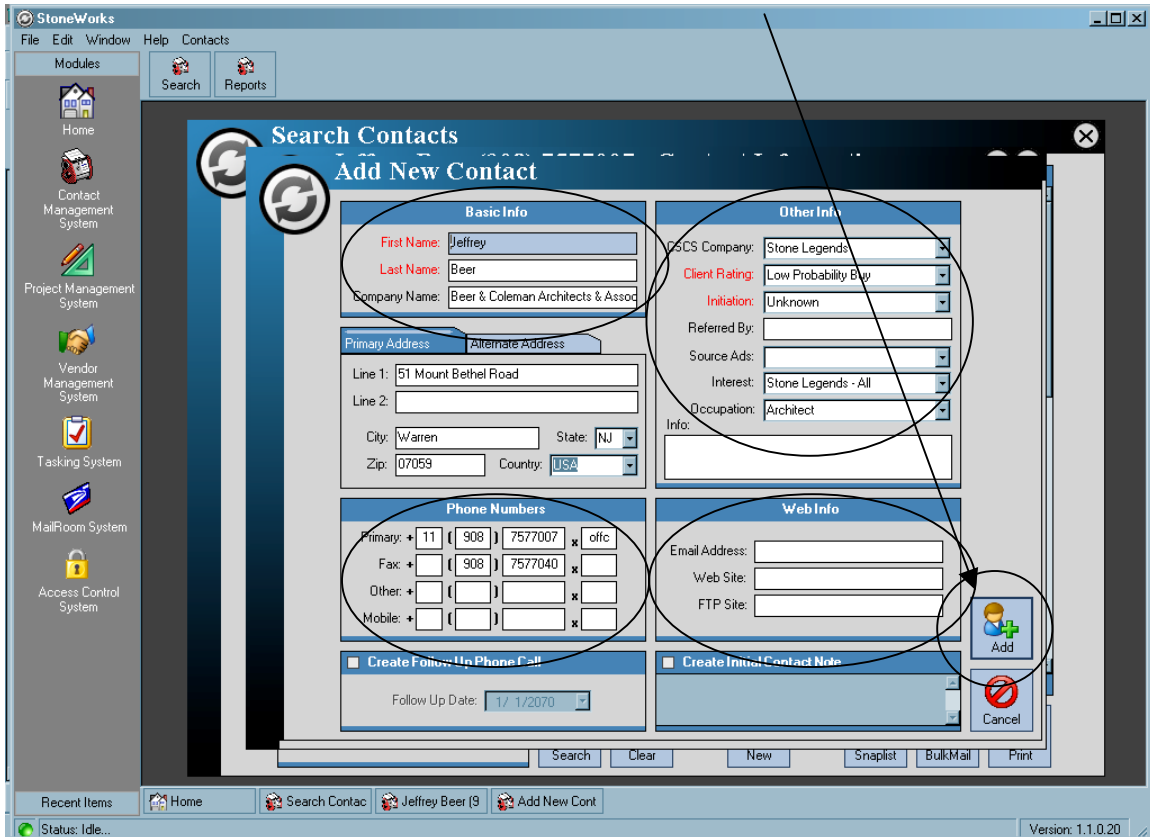


After opening that contact – hit “copy contact” button in upper right of screen.



Now you can modify the contact first name and last name. Also verify the phone number, fax number and if they have a cell number or email address we can include, their occupation (sometimes Architects are listed as Designers. Or you can further qualify an Architect as Residential or Commercial. Finally, verify the client rating.

Once all input is complete you can hit the “add” button.



If this is a new contact – continue filling out StoneWorks as noted.

Use the spaces as indicated to enter the rest of the contact information. Input the information carefully. Verify spelling of names and cities as needed. Remember that people do not like their names misspelled. Debbi is not the same as Debby or Debbie. Shawn could also be Sean or even Jon.

When entering a **Company Name**, **do not use punctuation**, like periods or spaces for initials, or commas between names.

Use “&” not “and.”

If at all possible, get at least a **Voice Phone Number** with area code. With companies, try to get the fax number also.

If a company, be sure to get a specific person as “Contact.” You may have to probe gently, but we need that information.

The screenshot shows the StoneWorks application interface. The main window is titled "Add New Contact" and is divided into several sections: "Basic Info", "Other Info", "Primary Address", "Phone Numbers", "Web Info", "Create Follow Up Phone Call", and "Create Initial Contact Note". The "Basic Info" section has fields for First Name, Last Name (filled with "Kerwin"), and Company Name. The "Other Info" section has dropdown menus for CSCS Company, Client Rating, Initiation, Referred By, Source Ads, Interest, and Occupation, along with an Info field. The "Primary Address" section has fields for Line 1, Line 2, City, State (filled with "OR"), Zip, and Country (filled with "USA"). The "Phone Numbers" section has fields for Primary, Fax, Other, and Mobile, each with a plus sign and a small icon. The "Web Info" section has fields for Email Address, Web Site, and FTP Site. The "Create Follow Up Phone Call" section has a "Follow Up Date" field filled with "10/25/2006". The "Create Initial Contact Note" section has a large text area. The interface includes a sidebar with icons for Home, Contact Management System, Project Management System, Vendor Management System, and Tasking System. The bottom of the window shows a taskbar with various application icons and a system tray with the time "1:49 PM".

Put phone # given in "Primary" slot – even if it is a cell phone. The cell number can be duplicated in the Mobile slot. But only the "Primary" number shows in the listing. If it is not filled, then we might not know that we have a phone number for that contact.

Use this field if contact describes a project or interest in particular products. If they mention the project phase or time schedules, please list that information. Try to get as much information as possible.

**** Company called & occupation** are critical to using the database. Do NOT leave empty. The **Company** name chosen will determine the automatic follow-ups for letters and postcards.

Under “Occupation” see the following:
For homeowners use: “End User”

For companies use: “Builder” or “Architect” or “Mason.” Avoid “Other”, “Remodel”, “New Construction” or “Restoration” as occupation – as this is actually project information and can go into “notes” at the bottom right of screen.

StoneWorks
File Edit Window Help Contacts
Modules
Search Reports
Home
Contact Management System
Project Management System
Vendor Management System
Tasking System
MailRoom System
Access Control System
Recent Items Home Search Contact Add New Cont
Status: Idle...
Inbox - Micr... StoneWo... Microsoft... Microsoft A...
Version: 1.1.0.20
1:49 PM

Choose the nearest appropriate occupation for the contact. For instance, not just Architect, but Architect – Residential, if you happen to find out that they only do residential work. If they do both, residential and commercial, leaving it as “Architect” only is adequate.

StoneWorks
File Edit Window Help Contacts

Modules
Search Reports

Home
Contact Management System
Project Management System
Vendor Management System
Tasking System
MailRoom System
Access Control System

Recent Items: Home Search Contact Add New Cont

Status: Idle... Version: 1.1.0.20

1:49 PM

Search Contacts
Add New Contact

Basic Info

Click the arrow next to **“Initiation”** field. Choose the appropriate way we learned of this contact. Usually it will be **Faxed In, Mailed In, Phoned In** or **Web site**.

Zip: Country: USA

Other Info

CSCS Company: Client Rating: Initiation: Referred By: Source Ads: Interest: Occupation: Info:

Web Info

Email Address: Web Site: FTP Site:

Create Initial Contact Note

Follow Up Date: 10/25/2006

Search Clear New Snaplist BulkMail Print

Cancel

Contact Company – choose the company that the contact called. If this is a phone call, what line did they use? If a Bingo Card label, the contact company will be listed on the label. If you are entering a handwritten sheet, it should be indicated.

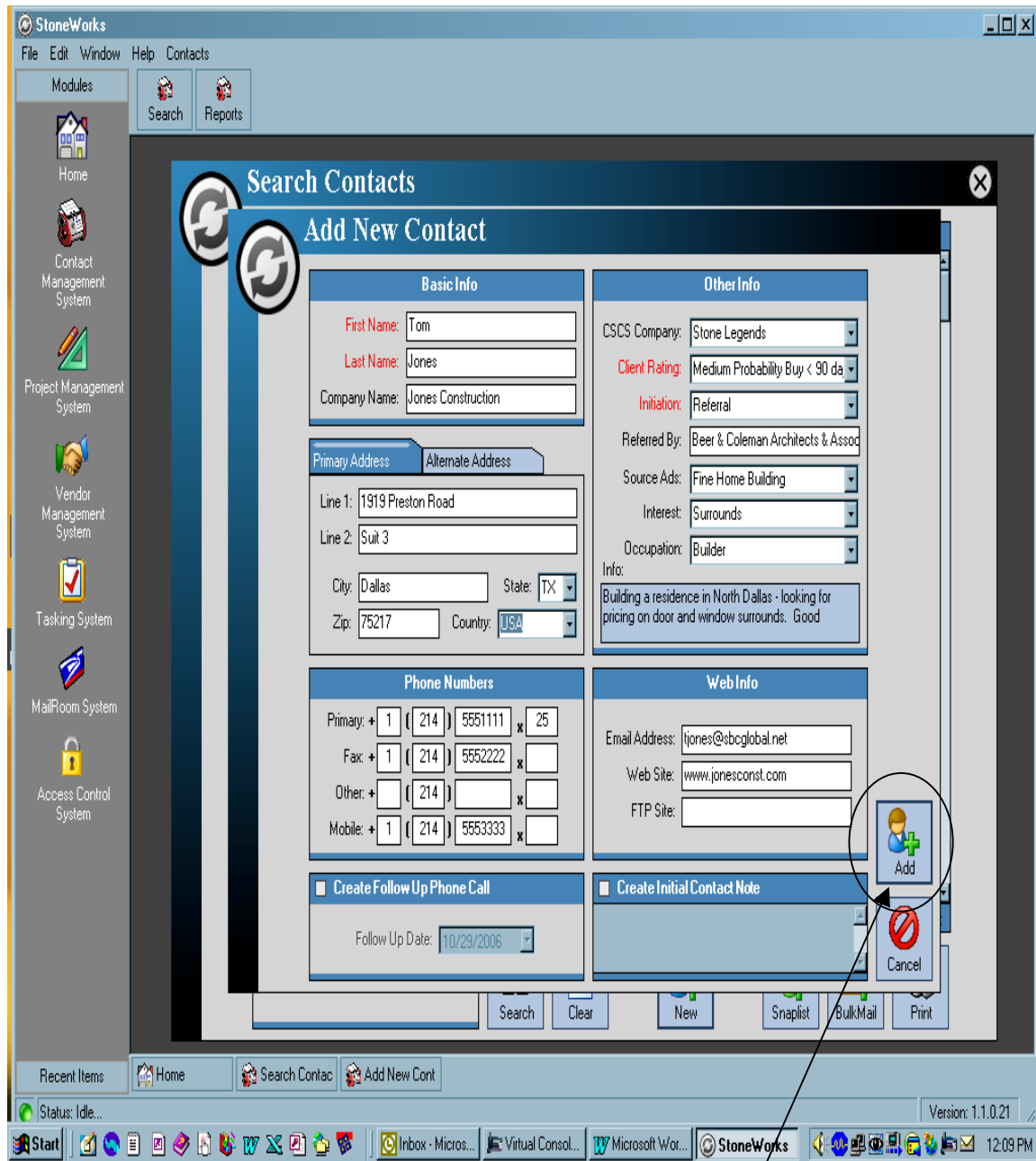
Contact Source Ads: This is **critical** to our advertising program. Ask: “Where did you hear about us?” Do not suggest publications – for accurate results, we need unaided recall of where the ad was run.

Use this field for additional info regarding themselves or their company.

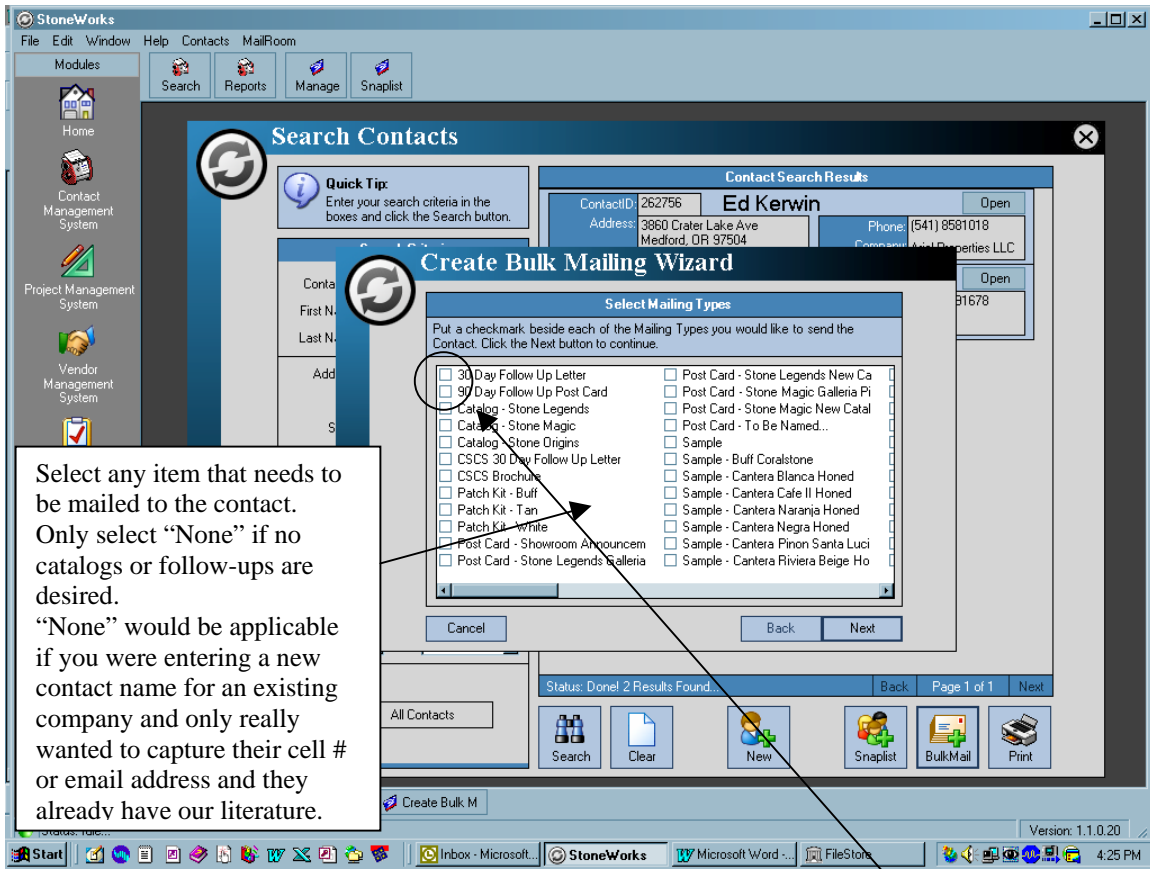
Client Rating – see FileStore # 43913 for our definitions of ratings.

See next page for a good example of a completely filled out form.

Good Example of a completely filled out new contact page:



Once the page is **completely** filled out – you can now hit “ADD” to add the contact to the database.



** Follow-up will automatically be checked based on "Company Contacted"
Do not revise this for the initial setup call.

Select material to be mailed:

1. **All Stone Legends contacts** get Stone Legends, Stone Origins and Stone Magic catalogs, unless they have a current Stone Magic catalog received recently and want Stone Legends to go with it
2. **All Stone Magic contacts** get only the Stone Magic catalog. Occasionally they will want columns and balustrade also but that is not normal. If so, send them Stone Legends too.
3. **Stone Origins contacts** get Stone Origins and Stone Magic.
4. **Business contacts** (professional & trade), such as architects and builders, send all three catalogs (Stone Legends, Stone Magic, Stone Origins).

Do not send samples to a first-time contact – unless you have a good reason.

Tell the prospect to look over the catalog first and if they are interested, we will send samples at that time.

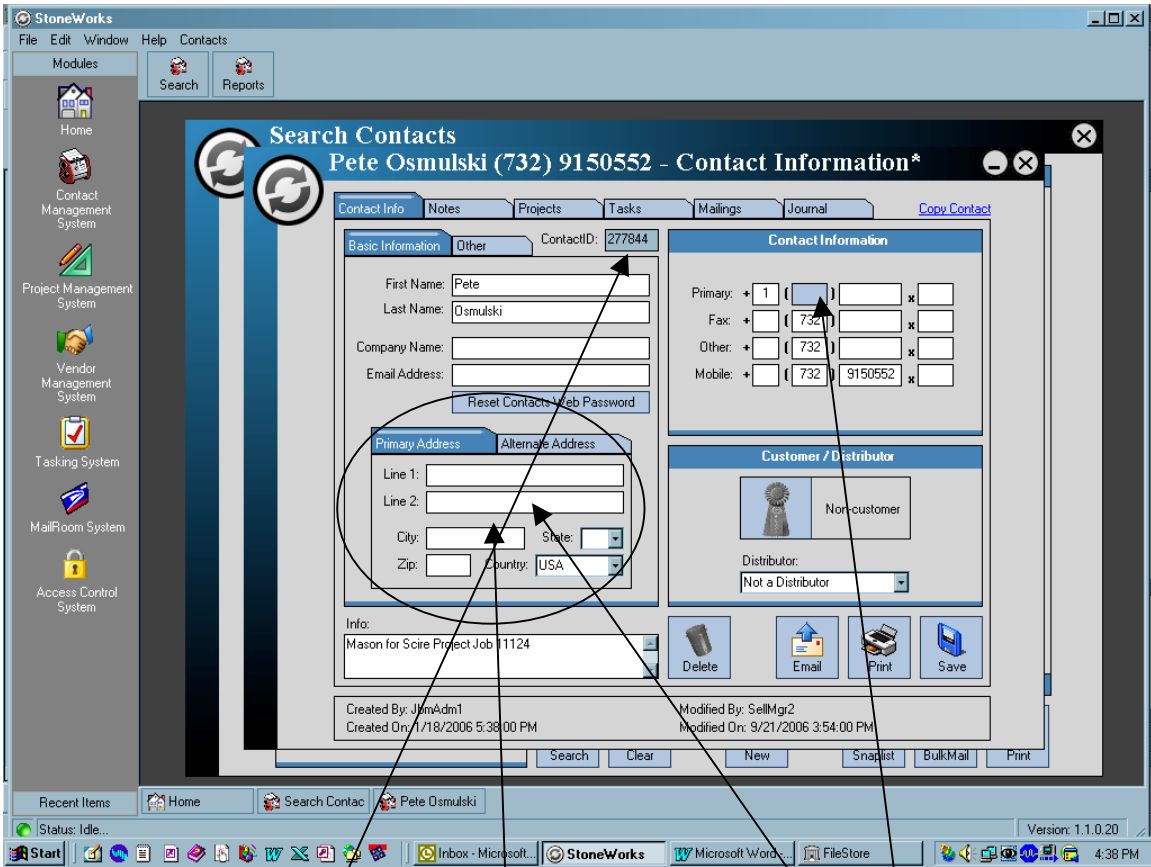
"SL Catalog" is our main architectural cast stone product line (this is a 500 page catalog and is sent out bulk mail and generally arrives in 4 to 5 weeks).

"SM Catalog" is our cast stone fireplace line

"SO Catalog" is our cut or natural stone products line

(SM & SO catalogs are mailed out 1st Class and generally are received within 1 week)

Example of a poorly filled out Contact Form.



Contact has now been added and assigned a contact ID.

This screen is an example of a poor contact set-up...
No address information – no primary phone information.

Do not set up mailing for contacts without a mailing address.