CONSTITUENT SERVICE SOFTWARE
Version 1.0

INTRODUCTION

Constituent Service Software is a constituent tracking tool that allows you to:

- Find constituent information quickly
- Produce reports
- Keep in contact with your constituents

Constituent Service Software is designed for maximum ease of use while providing critical information and tools to run a service office.

For options to:	See:
Select activities from the Main Screen	Chapter 1
Search for constituents and view constituent information	Chapter 2
Generate worksheets	Chapter 3
Enter data	Chapter 4
Print mailing labels, enevelopes or form letters; export data for mail merge	Chapter 5
Add or edit user-defined fields	Chapter 6
Write and print form letters	Chapter 7
View and edit issues	Chapter 8
View/edit casework and add casework actions	Chapter 9
Run reports	Chapter 10
Change your password; enter caseworkers; update fields; append user-defined fields; update your constituent database; append new constitutents; export user-defined fields	Chapter 11
Select search criteria	Appendix 1
Back up and compact the database	Appendix 2
Read helpful tips	Appendix 3
Learn about printing and previewing	Appendix 4
See field descriptions	Appendix 5

INSTALLATION

1. Insert the CD into your CD-ROM drive.

2. Click Start and select Run.

3. Type d:setup (or e:setup if your CD-ROM drive is e:).

4. Use all the default settings that Constituent Service Software suggests to you during the setup. If the program files are not in c:\constit, the program will not run.

   If you cannot use the defaults, please contact Arcos Software Technical Support at 773-281-9512.

The setup program builds a group of icons for Constituent Service Software. Some of them are used only for maintenance (See Appendix 2.)

If you need to place the data file (consdata.mdb) anywhere except c:\constit (the default directory during installation), please add the following line to the [Run-Time Options] section in the c:\windows\const.ini file: *Consdata=<path>* with no spaces and no ending backslash. (Replace *<path>* with your path.) In addition, you must change the path of the consdata.mdb file in the Compact_Restore consdata.mdb icon. (Call 773-281-9512 if you need help with this.) If you have moved the data file from c:\constit, delete it from the c:\constit directory.

RUNNING CONSTITUENT SERVICE SOFTWARE

To start Constituent Service Software, double-click the Constituent Service Software icon:

arcos

You are then asked for a Logon Name and a Password.

- The Logon Name is **Manager**. This logon provides full access to the program If your job requires that you perform data entry only, type **Guest** in the Name field. You will have restricted access to the program.

- The default password is **MANAGER**. (You must type this in all caps.) Once inside the program, you can change your password. The Guest logon name needs no password.

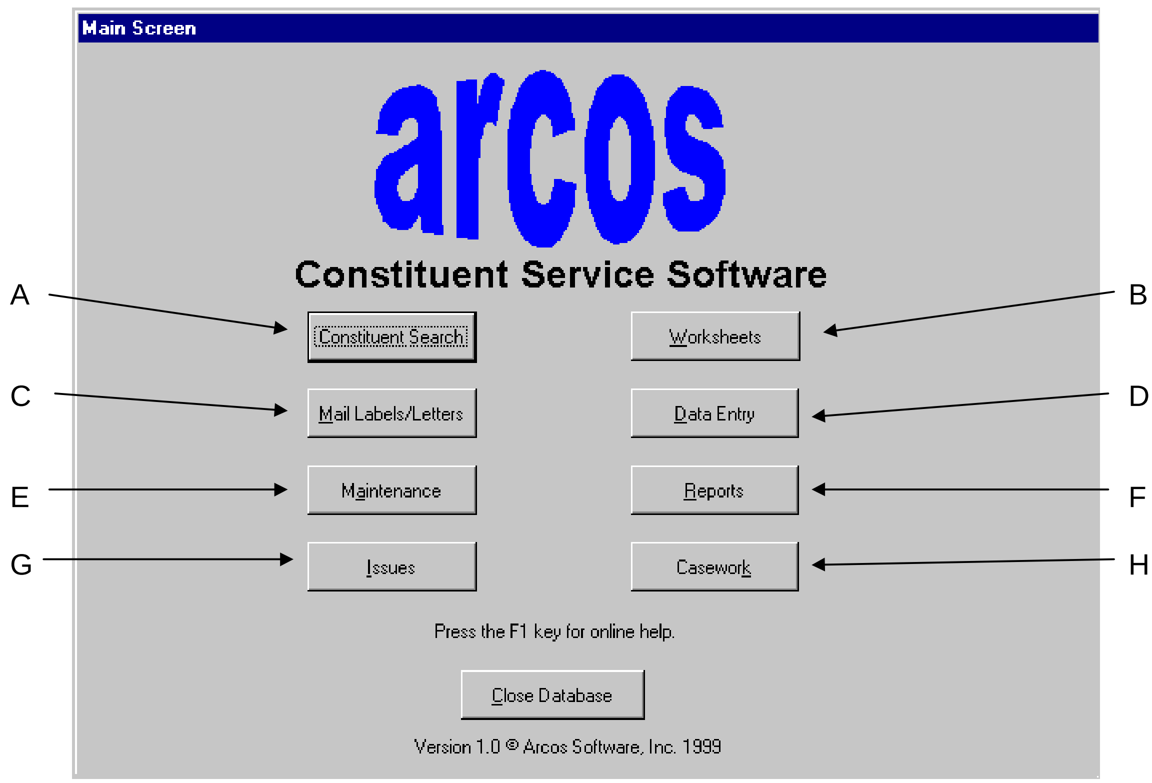
CHAPTER 1 – MAIN SCREEN

This chapter briefly describes the capabilities of Constituent Service Software.

Note - If you logged in as 'Guest', you will not have access to Mail Labels/Letters, Maintenance, Worksheets or Reports.

Constituent Search

Click the Constituent Search button (Fig.1 - A) to open a screen where you can look up a constituent by address, last name, or telephone number. From the accessed screen, you can view or enter extensive information about the constituent, add constituents or delete constituents. For more information, refer to Chapter 2 -- Constituent Search.



Worksheets

Click the Worksheets button (Fig.1 - B) to open a screen where you can produce custom worksheets for your search criteria. For more information on Worksheets, refer to Chapter 3 -- Worksheets.

Mail Labels/Letters

Click the Mail Labels/Letters button (Fig.1 - C) to produce mailing labels, form letters, envelopes, or export mailing information to Microsoft Word or WordPerfect files. Additionally, you can export mailing data to a mail house for inkjetting directly onto your mail pieces. For more information on Mail Labels/Letters, refer to Chapter 5 -- Mailing Labels.

Data Entry

Click the Data Entry button (Fig.1 - D) to enter information gathered from Worksheets. For more information on data entry, refer to Chapter 4 -- Data Entry.

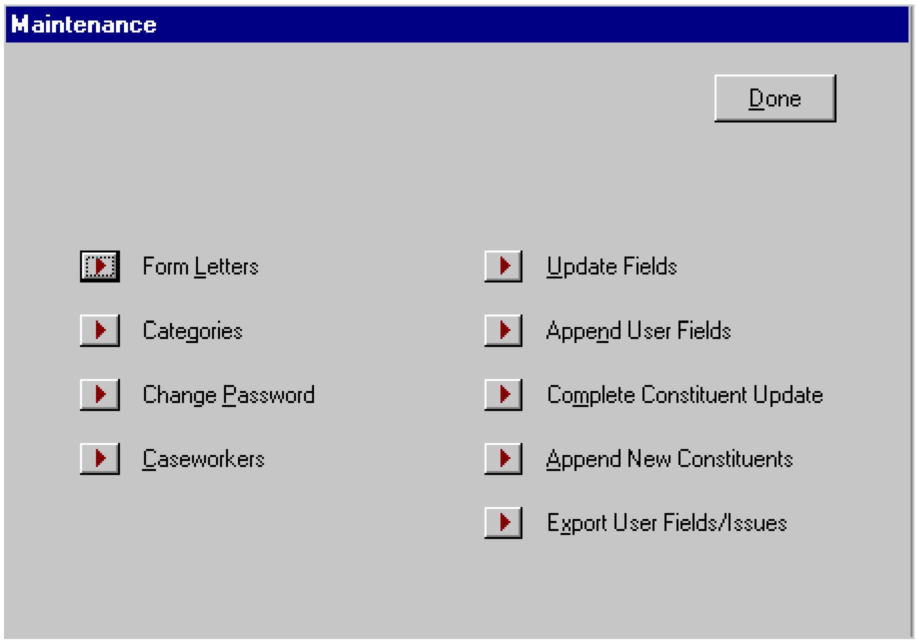


Fig. 2

Maintenance

Click the Maintenance button (Fig.1 - E) to display the Maintenance (Fig.2) screen. From this screen, you can

- Write customized form letters. For more information, refer to Chapter 7 -- Form Letters.
- Set up categories for user-defined fields. For more information, refer to Chapter 6 -- User-Defined fields.
- Change your password. For more information, refer to the Changing Your Password section in Chapter 11 -- Maintenance.
- Maintain a list of employees. For more information, refer to the Employees section in Chapter 11 -- Maintenance.
- Update fields. For more information, refer to the Updating Fields section in Chapter 11 -- Maintenance.
- Append user fields. For more information, refer to the Append User Fields section in Chapter 11 -- Maintenance.

- Perform a complete constituent update. For more information, refer to the Complete Constituent Update section in Chapter 11 -- Maintenance.

- Append new constituents. For more information, refer to the Append New Constituents section in Chapter11 -- Maintenance.

- Export a file containing your user-fields and issues. For more information refer to the Employees section in Chapter 11 -- Maintenance.

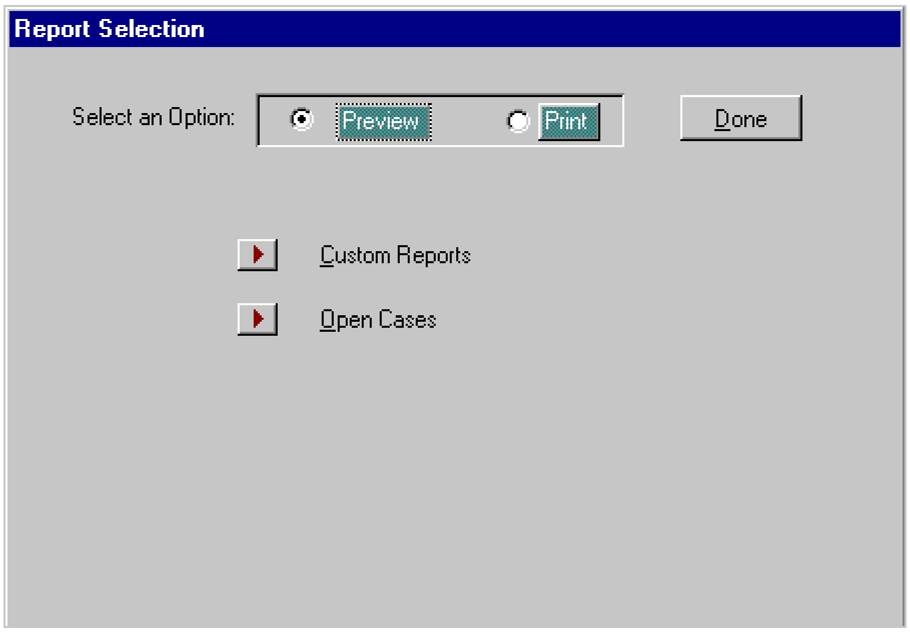


Fig. 3

Reports
Click the Reports button (Fig.1 - F) to bring up the Report Selection screen (Fig.3) From this screen, you can print:

- Custom Reports

- Open Cases

For more information, refer to Chapter 10 -- Reports.

Issues
Click the Issue button (Fig.1 - G) to display the Issues section where you can view and edit constituents' stances on issues. For more information, refer to Chapter 8 -- Issues.

Casework
Click the Casework button (Fig.1 - H) to display the Casework section where you can view and edit casework your office is working on. For more information, refer to Chapter 9 -- Casework.

CHAPTER 2 – CONSTITUENT SEARCH

In the Constituent Search section, you can locate any constituent in the district by typing in any part of the last name, address or phone number. You can then view constituent information, edit constituent information, add constituents and delete constituents.

To access the Constituent Search option, click the Constituent Search button on the Main Screen. You can also access this option by holding down Alt and pressing the S key.

SEARCHING FOR A CONSTITUENT

Limiting Search By County or City

This feature allows you to limit your search to a specific geographic area to speed up searches and limit the number of names returned.

1. Select the county or city from the drop down list (Fig.1 - A). You do not have to make a selection if you want to search the entire database. If you do use this option, you can select only one county or one city at a time.

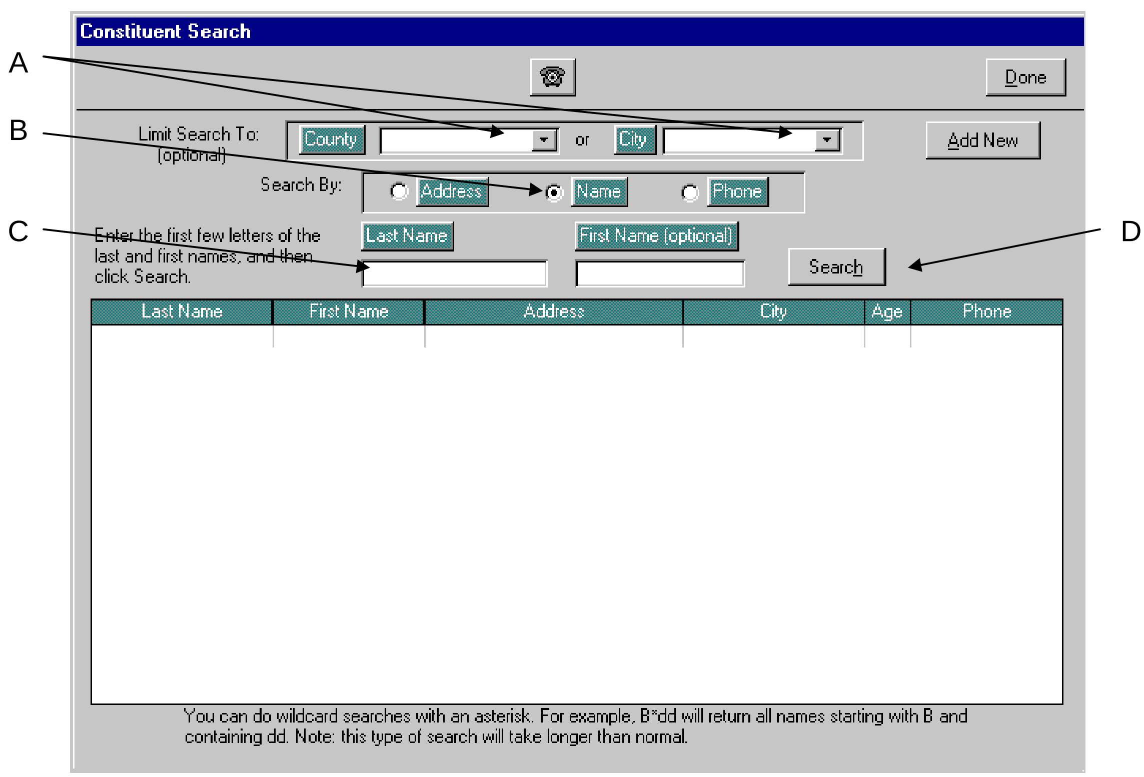


Fig. 1

2. Determine how you wish to find the constituent:

   - by name
   - by phone number
   - by address

   Refer to the following sections for specific instructions.

By Name

This feature allows you to look up constituents by name.

1. Click the small circle in the "Search By" section next to Name (Fig.1 - B). (Name is the default setting and is automatically selected when you access this feature.)

2. Type in the last name (Fig.1 - C) and first name (optional).

3. To search,
   - click the Search button (Fig.1 - D)
     (or)
   - press the TAB key and then the ENTER key.

This search displays all constituents whose last name (and first name) begins with the letters you typed in. (For more information, see the Wildcard Searches section in this chapter.)

HINT - It is not necessary to type in the first name or the entire last name. Only the first few letters of the last name are usually necessary.

By Phone Number

This feature allows you to look up constituents by phone number.

1.Click the small circle in the "Search By" section next to Phone (Fig.2 - A).

Fig. 2

2. Enter the phone number (Fig.2 - B) you wish to find.

3. After entering the phone number, search by:
   - clicking on the Search button (Fig.2 - C)
     (or)
   - pressing the TAB key and then the ENTER key.

Remember that many constituents have unlisted phone numbers, so they will not appear in the display.

HINT - It is not necessary to type in the entire phone number. Type in the area code, prefix and as much of the number as you know. The more you type in, the faster the search is. (For more information, see the Wildcard Searches section in this chapter.)

By Address

This feature allows you to look up constituents by street address.

1. Click the small circle in the "Search By" section next to Address (Fig.3 - A).

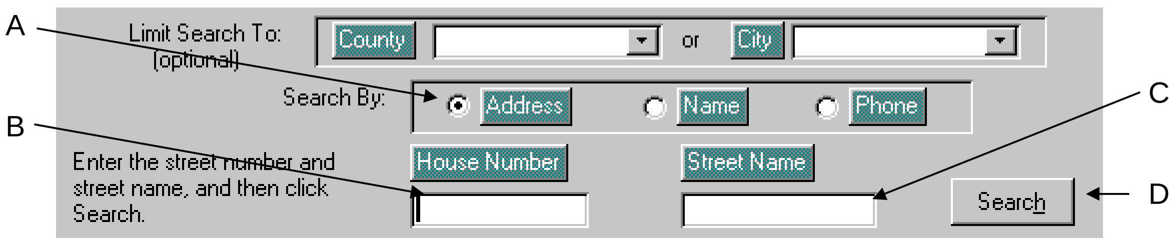


Fig. 3

2. Enter the House Number (Fig.3 - B) and Street Name (Fig.3 - C).

3. After entering the information, search by:
   - clicking on the Search button (Fig.3 - D)
     (or)
   - pressing the TAB key and then the ENTER key.

HINT - You do not need to type in the entire Street Name. Only the first few letters are needed. If you do not know the constituent's house number or you want to see an entire street of constituents, you can just type in the street name and it displays all constituents who live on that street. If you want to see constituents on a specific block, type in the hundred for the block. For example, 500 displays the entire 500 block of the street, or 2500 displays the entire 2500 block.

Some street names in the database have a direction (e.g., W First St.). These are sorted alphabetically among streets without directions. So, W First St. comes after all addresses on First St. (For more information, see the Wildcard Searches section in this chapter.)

Wildcard Searches

Wildcard searches allows you to find a constituent even if you have incomplete information about that person. You can use an asterisk (*) or question mark (?) in place of unknown characters for wildcard searches.

The asterisk represents any letter or combination of letters.

For example, if you are attempting to find a constituent by name and typed T*dd in the Last Name field, anyone with a last name beginning with T and containing two d's next to each other would appear. For example, Tadd, Todd, Tedder, Troadde, etc. would appear. (Do not use asterisks with phone number searches. You will get unexpected results.)

The question mark represents only a single letter or number.
For example, if you entered T?dd in the Last Name field, anyone with a last name beginning with T and ending with two d's would appear. For example, Tadd and Todd would appear.

Always put a question mark in place of any unknown number in a phone number.
If you were to type in a phone number such as 708-555-12??, then 708-555-1211, 708-555-1212, 708-555-1223, etc. would appear. Try not to use a question mark in the area code or first two digits of the prefix, because the search takes considerably longer.

Use wildcards cautiously. Searches take longer when using wildcards. Whenever possible, do not use a wildcard as the first character. If a wildcard is the first character, the search could take several minutes.

VIEWING CONSTITUENT INFORMATION

After you use the Search option, the Constituent Search screen displays a list of constituents who match your search criteria. This screen only provides limited data about each constituent. You can add a new constituent by clicking Add New (Fig.4 - A). For more information, refer to the Adding a Constituent section in this chapter.

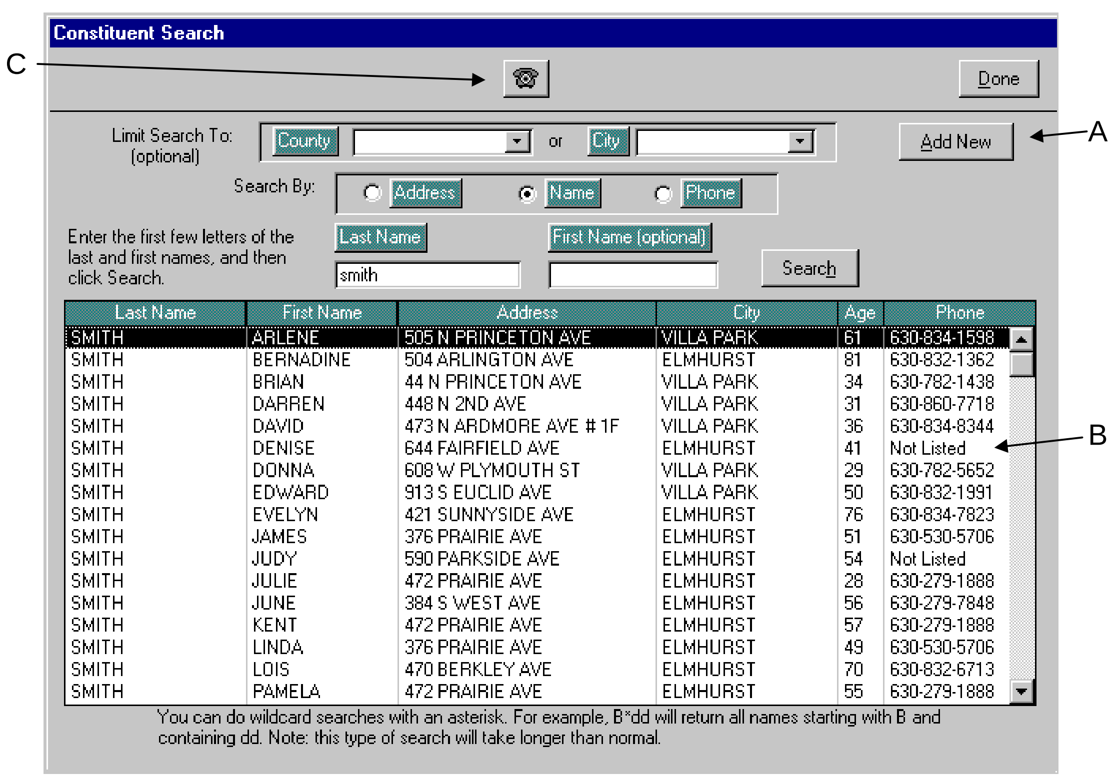


Fig.4

To see more information about the constituent, you can

- double-click anywhere in the line (Fig.4 - B) where the constituent is displayed
  (or)
- select (highlight) the constituent either by clicking with the mouse or using the ↑ or ↓ keys, and then pressing the ENTER key.

The Constituent Search detail screen (Fig.5) appears.

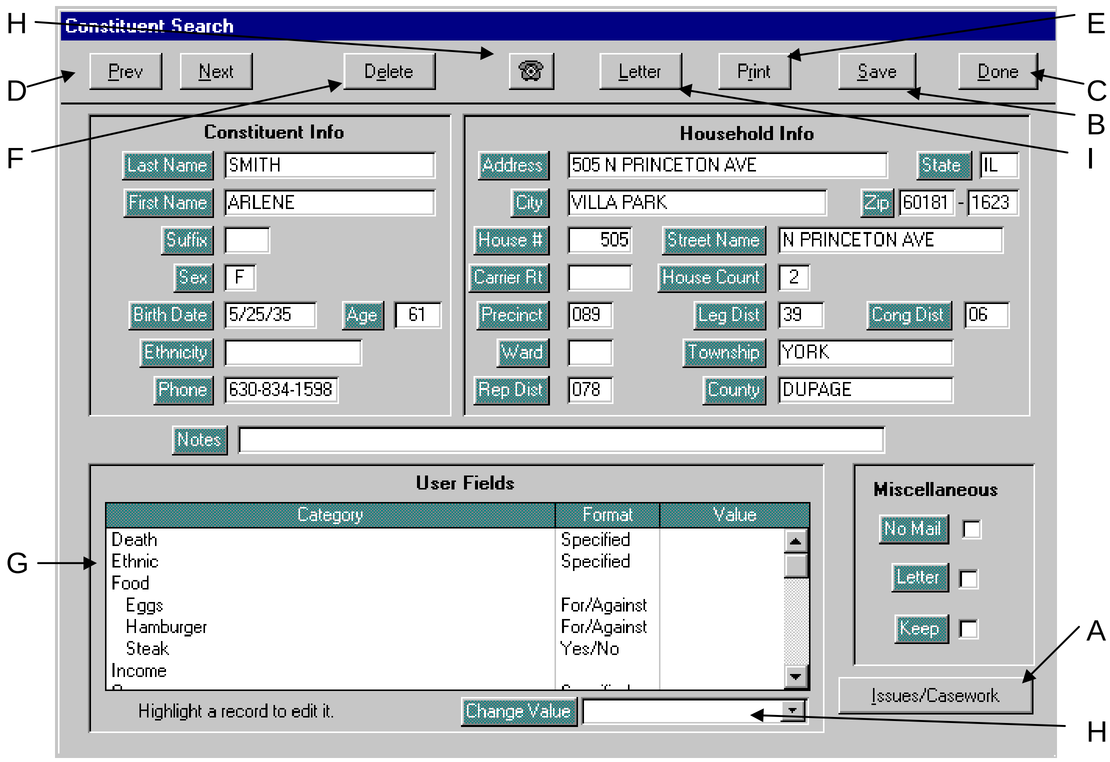


Fig.5

EDITING CONSTITUENT INFORMATION

From the Constituent Search detail screen, you can change the constituent's information if you have proper authorization. However, any user can enter information into Letter, No Mail and Keep fields. (For explanations of these fields, refer to Appendix 5.) By clicking on the Issues/Casework button (Fig.5 - A), you can enter information about stances on issues and casework. (For more information about these fields, refer to Chapter 8 -- Issues and Chapter 9 -- Casework.)

To change the constituent's current information,

1. Tab to the field (or click in it).

2. Type the new information.

3. **Click the Save button** (Fig.5 - B*). If you do not click the Save button, the changes will not be recorded.*

4. When you are finished, click the Done button (Fig.5 - C) to return to the previous screen. To speed up the display of constituents, the list is not refreshed. Therefore, any changes you made will not appear in the list. To see your changes, re-run the search by clicking the Search button (Fig.3 - D).

To cancel changes made to a record (before they are saved),

1. Click the Done button (Fig.5 - C).

2. Respond Yes, you do want to leave the record without saving your changes.

To view the previous or next constituent, click the Prev or Next buttons (Fig.5 - D).

To print any of these screens, click the Print button (Fig.5 - E).

To delete a constituent, click the Delete button (Fig.5 - F). *Once a constituent is deleted, he or she is permanently removed from your list.*

HINT - When editing address information, refer to the Entering Address Information section in this chapter.

ADDING A CONSTITUENT

To add a constituent to your list, click the Add New button (Fig.4 - A) on the Constituent Search screen. A screen (Fig.6) appears where you simply type in all the information you have about the new constituent.

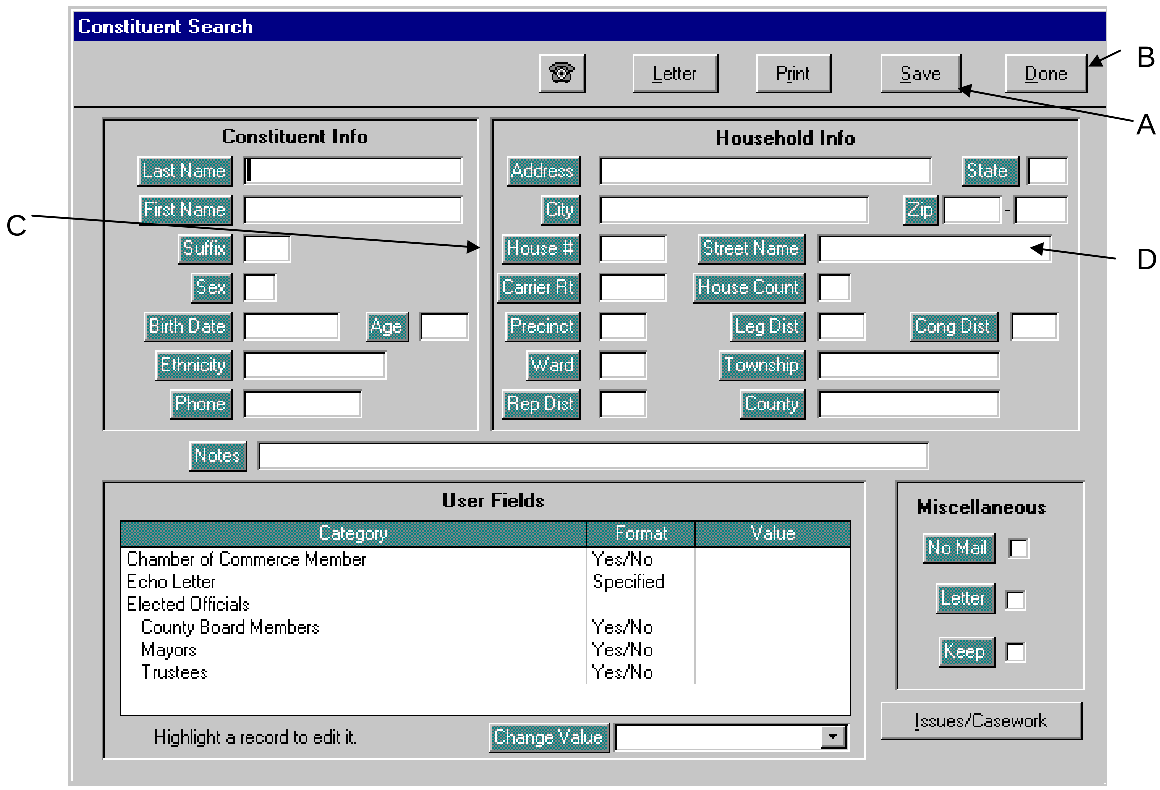


Fig.6

You must click the Save button (Fig.6 - A) for the new constituent to be added to the data. If you do not click Save, the constituent will not be included. After clicking Save, you will automatically be able to enter another new constituent.

When you are finished, click the Done button (Fig.6 - B) to return to the previous screen. To speed up the display of constituent, the list is not refreshed. Therefore, any additions you made will not appear in the list. To see your additions, re-run the search by clicking the Search button (Fig.3 - D).

Be careful not to enter a constituent who is already listed. To determine if the constituent is already in the system, perform a careful search using the methods previously described to ensure that you are not duplicating constituents.

HINT - When adding address information, refer to the Entering Address Information section in this chapter.

ENTERING ADDRESS INFORMATION

When entering Address, House Number and Street Name information, use the following guidelines.

Address
When adding or editing an address with an apartment number, use the format 101 N MAIN ST # 123 for best householding results. Use '#' instead of APT (UNIT, LOT, etc.), and make sure there is a space before and after the '#'.

House Number, Street Name
The House Number (Fig.6 - C) field must contain only numbers (no letters). It is used to sort records on worksheets and to generate postal bar codes. The Street Name field (Fig.6 – D) is used to sort records on the worksheets. Enter the House # and Street Name based on the following examples:

Address	House Number	Street Name
101 N MAIN ST	101	N MAIN ST
101 1/2 N MAIN ST	101	N MAIN ST
101 N MAIN ST # 123	101	N MAIN ST
COUNTRY CLUB HILLS	0	COUNTRY CLUB HILLS
17W124 N MAIN ST	124	N MAIN ST 17W
RR1	0	RR1
RR1 BOX 101	101	RR1
PO BOX 3	3	PO BOX

CONSTITUENT SEARCH SCREEN SECTIONS

For more detailed information on the following fields, refer to Appendix 5 - Fields.

Constituent Info
This section of the Constituent Search detail screen displays personal demographics including the constituent's name, sex, birth date, age and telephone number.

Household Info
This section of the Constituent Search detail screen displays dwelling information including the constituent's address, the number of registered voters in the home and which districts they reside in.

Notes
You can enter miscellaneous notes about the constituent. To display more than one line of notes, either Tab into or click your mouse in the Notes field. To shrink the field back to one line, either Tab out of the Notes field or click your mouse in another field.

Miscellaneous
This section of the Constituent Search detail screen displays requests for no mail to be sent, people who will be sent a form letter and people to keep during the next update. To indicate a Yes for any of these boxes, click in the box and an X appears. Or, you can press the TAB key on the keyboard to highlight the box and then press the spacebar. To remove the X from a box, either click it again or Tab into it and press the spacebar.

User Fields

From the Constituent Search screen, you can enter information into your user-defined fields. (See Chapter 6 for a description of how to set up these fields).

To enter information into a field, first select the field from the list (Fig.5 - G). Then click (or Tab into) the drop down box at the bottom of the screen (Fig.5 - H). This displays a list of possible values for that field. Select a value from the list or enter a value if there are no selection values.

These fields can be used to track any information. For example, if you want a list of all local elected officials, you could add fields for Mayors, Village Trustees, County Board Members, etc. and record the information here.

These fields can also be used for letters you send out frequently. For example, if you send letters to students who make the honor roll in college, you can add a user-defined field for Honor Roll. To send the letters, go to the Mail Labels/Letters screen, select Honor Roll = Yes as the criteria and run the letters. (For more information on mailings, refer to Chapter 5 -- Mailing Labels.)

Issues

This section of the program displays the constitutent's stance on issues. (See Chapter 6 for a description of how to set up the issue categories). Click the Issues/Casework button to display the Issues list (Fig.7 – A).

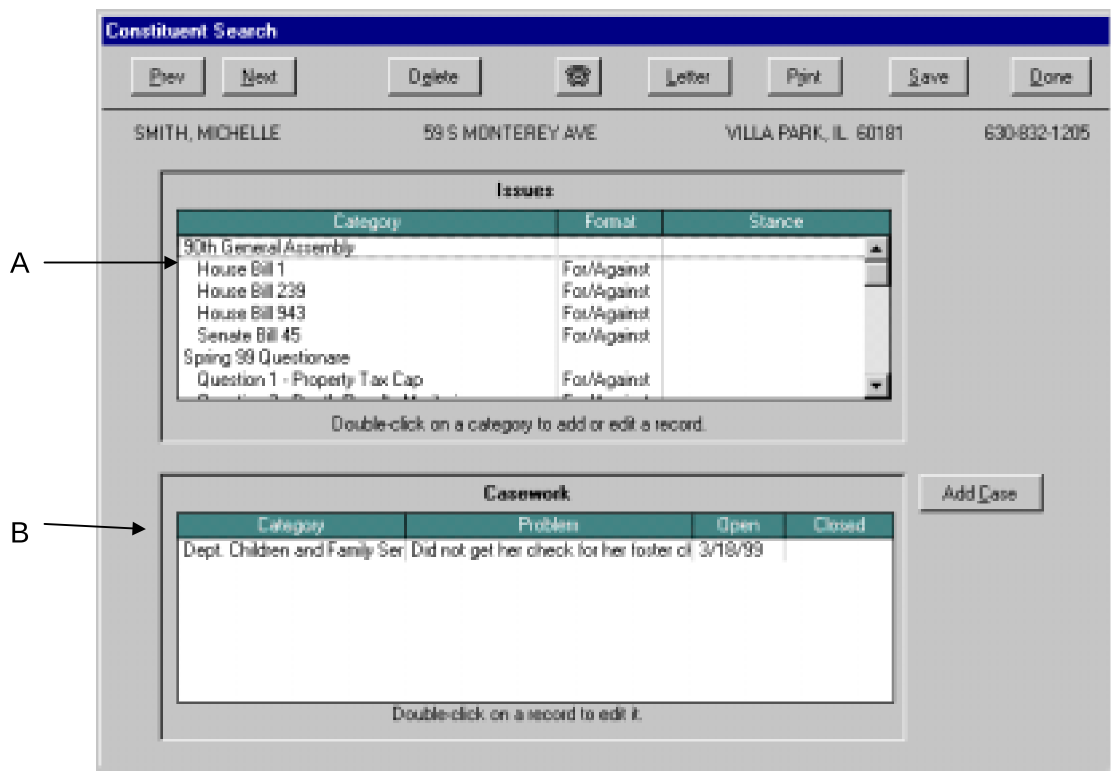


Fig. 7

Use this section to record all communications (calls, letters, etc.) that are received regarding issues. This includes, but is not limited to, legislative issues. For example, if you receive a letter asking for a Yes vote on House Bill 239, click on House Bill 239 in the Issues list. Then, record the letter.

This can also be used to record Questionnaire responses. You could enter Questions as Question 1 - Property Tax Cap, Question 2 - Death Penalty Moratorium, Question 3 - Most Important Issue as subcategories of Spring 99 Questionnaire.

To enter or edit information in a field,

1. Double-click on an issue in the list. The Issues screen (Fig.8) appears.

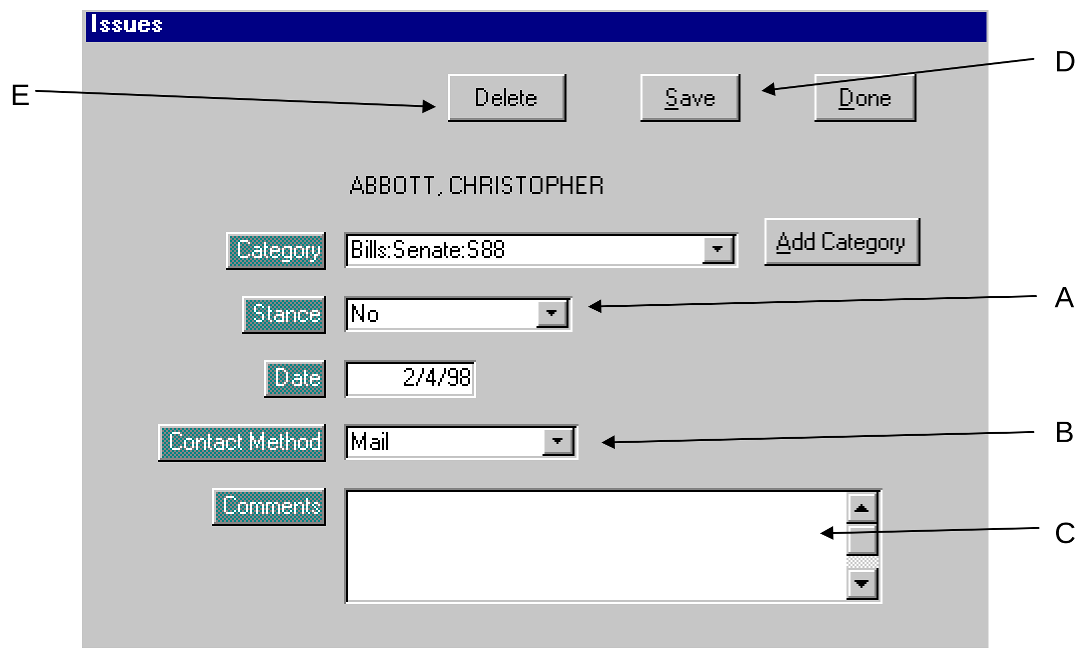


Fig. 8

2. Choose a Stance from the drop-down list (Fig.8 - A).

3. If needed, enter a Contact Method (Fig.8 - B) and comments (Fig.8 - C).

4. Click the Save button (Fig.8 - D) to save the record.
 (or)
 Click the Delete button (Fig.8 - E) to delete the record.

Casework

This section of the program displays casework for the constituent. Click the Issues/Casework button (Fig.5 – A) to display the Casework list (Fig.7 – B).

If you are a state candidate, you may want to set up the categories as different agencies and the subcategories as the type of problem. For example, Dept. of Public Aid would have the subcategories of Medicare, Food Stamps, etc.

To add casework for the constituent,
1. Click the Add Case button. The Cases screen (Fig.9) appears.

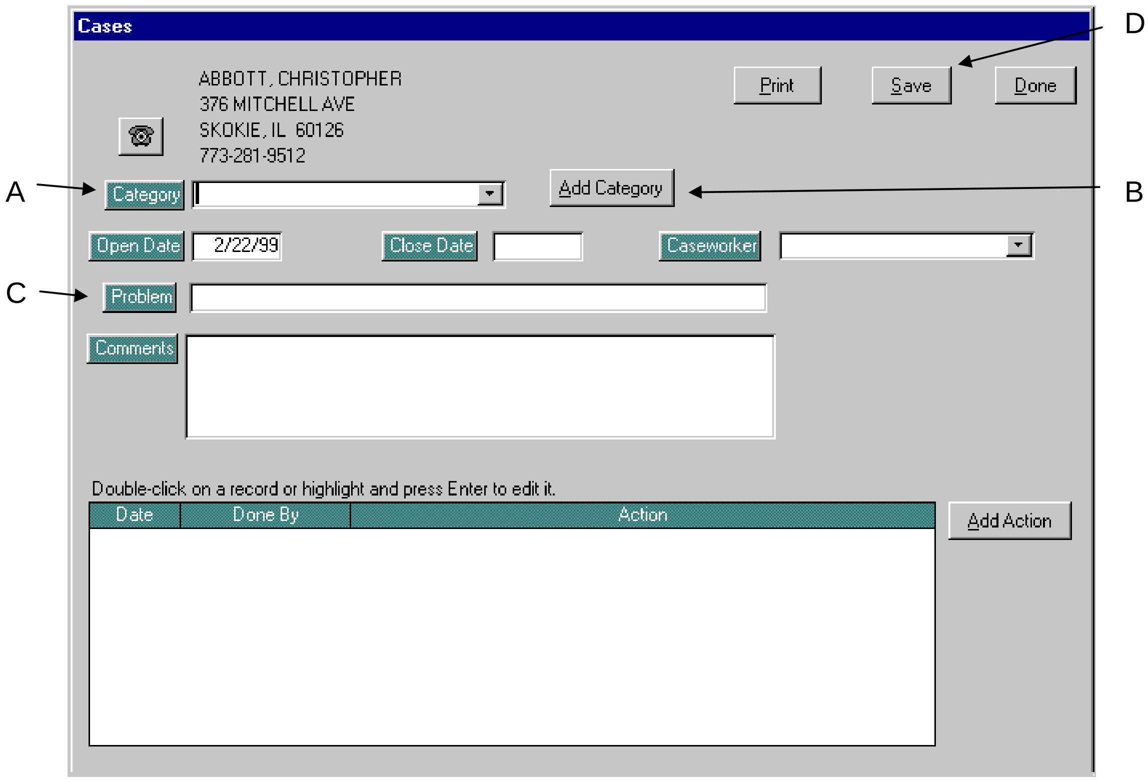


Fig. 9

2. Select a Category from the drop-down list (Fig.9 - A). Or to add a new category, click the Add Category button (Fig.9 - B). (See Chapter 6 for a description of how to set up the casework categories.)

3. Enter the problem (Fig.9 - C).

4. Optionally, enter other information in the appropriate fields

5. Click the Save button (Fig.9 - D) to save the record.

To edit a casework record,
1. Double-click on a record in the list (Fig.7 - B). The Cases screen (Fig.10) appears.

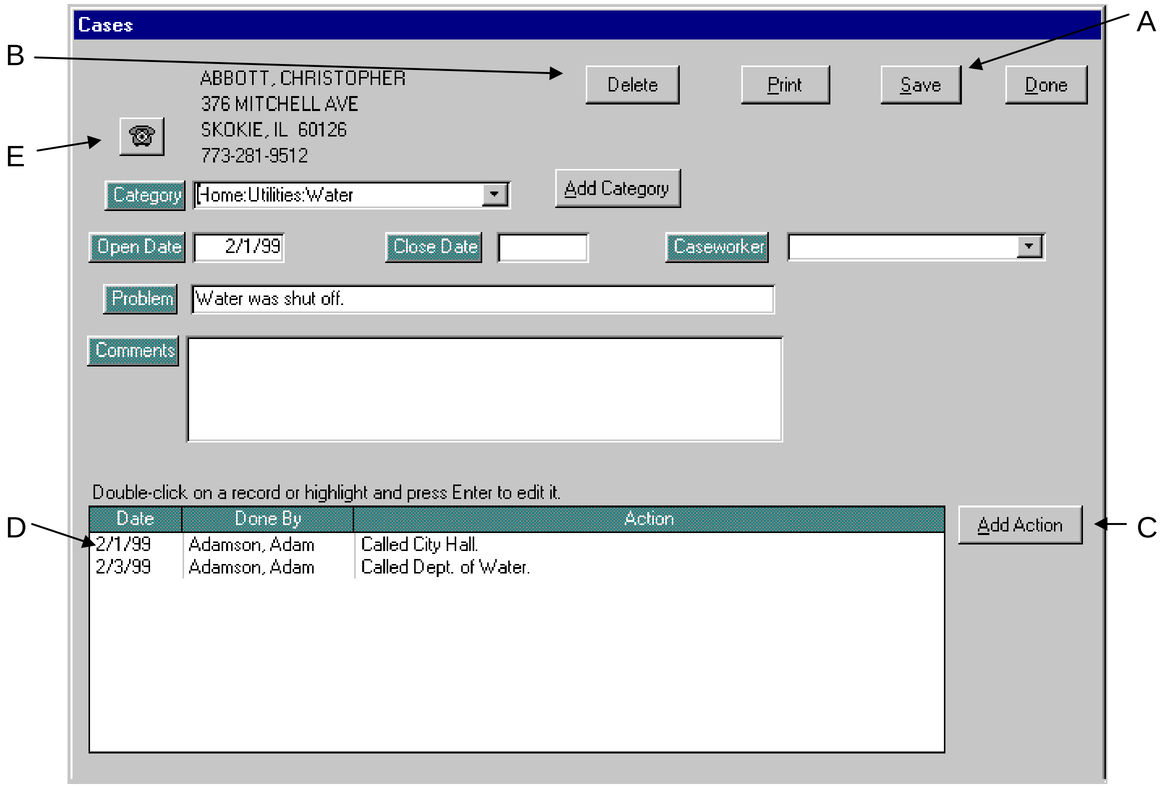


Fig. 10

2. Make the appropriate changes.

3. Click the Save button (Fig.10 - A) to save the record.
   (or)
   Click the Delete button (Fig.10 - B) to delete the record.

To add actions for casework,

1. Click the Add Action button (Fig.10 - C) on the Cases screen. The Case Actions screen (Fig.11) appears.

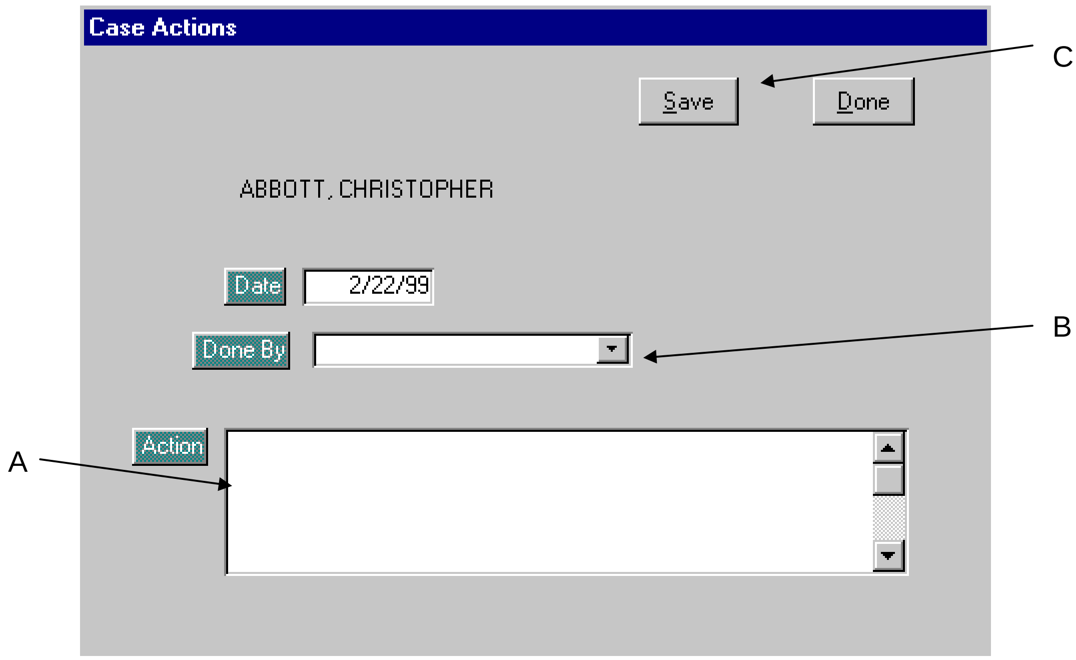


Fig. 11

2. Enter the Action (Fig.11 - A) that was done.

3. Optionally, select the name of the person who performed the action from the Done By drop-down list (Fig.11 - B).

4. Click the Save button (Fig.11 - C) to save the record.

To edit an action for casework,

1. Double-click an action in the list (Fig.10 - D) on the Cases screen.

2. Make the appropriate changes.

3. Click the Save button to save the record.
   (or)
   Click the Delete button to delete the record.

PHONING A CONSTITUENT

You can automatically phone a constituent if you have a modem and are able to use a phone receiver on the same phone line as the modem. Be sure the modem is already functioning properly.

To phone a person in the search list results,

1. Highlight a name in the list (Fig.4 - B).

2. Click the Phone button (Fig.4 - C).

3. Click the OK button on the AutoDialer window.

4. As the call is dialing, pick up the receiver.

To phone a person from the Detail screen (Fig.5),

1. Click the Phone button (Fig.5 - H).

2. Click the OK button on the AutoDialer window.

3. As the call is dialing, pick up the receiver.

To phone a person from the Cases screen (Fig.10),

1. Click the Phone button (Fig.10 - E).

2. Click the OK button on the AutoDialer window.

3. As the call is dialing, pick up the receiver.

PRINTING A LETTER TO A CONSTITUENT

To print a letter to a selected constituent,

1. Click the Letter button (Fig.5 - I) on the Detail screen of the constituent.

2. Make selections as they appear. (Refer to Chapter 7 -- Form Letters for more information on printing form letters.)

EXITING CONSTITUENT SEARCH

To exit Constituent Search screen after saving any new or modified information, click Done until you return to the Main Screen. You may also press the Esc key to return to the Main Screen.

CHAPTER 3 – WORKSHEETS

Worksheets print out a standard format of names, addresses, phone numbers, age and sex based on selection criteria in alphabetical order. Worksheets can be helpful if the elected official wants to contact any group of constituents you have marked in the program. For example, you may want to print a list of all who oppose House Bill 235.

Worksheets can also be helpful to run lists for the Data Entry screen, since constituents on the Data Entry screen will be in the same order as on the worksheet.

To access Worksheets, click the Worksheets button on the Main Screen. The Work Sheets screen (Fig.1) appears.

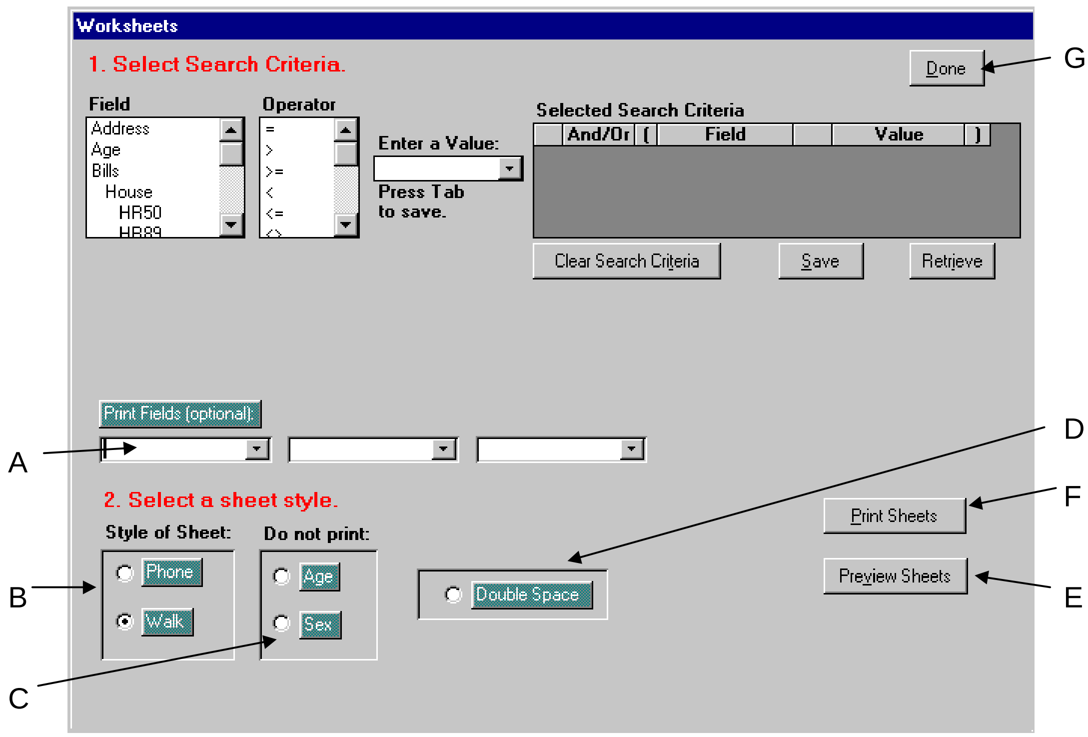


Fig. 1

1. Enter the search criteria for consitutents to be included on the worksheets. (For more information on selecting search criteria, refer to Appendix 1 -- Selecting Search Criteria.)

2. You can include up to three additional fields on your worksheets. To select a field, click the down arrow to display the list of fields (Fig.1 - A). Then, click one to select it.

   If a constituent has no information entered for a user-defined field, the following will display on the worksheet: Y N for a Yes/No field; F A for a For/Against field. If your user-defined field uses specified or unspecified values, the space under the field name will appear blank.

3. In the Style of Sheet section, click the small circle next to either Phone or Walk to select the style of sheets needed (Fig.1 - B). Walk style sheets have all constituents listed on them, whereas Phone style sheets have only those constituents for whom telephone numbers are available.

4. If you do not want to print Age or Sex on the sheets, click the appropriate radio button(s) in the Do Not Print section (Fig.1 - C).

13. To double space the sheets, click the circle next to Double Space (Fig.1 - D).

14. Click the Preview Sheets (Fig.1 - E) or Print Sheets (Fig.1 - F) button to preview or print the sheets. (See the Print Preview section in Appendix 3 -- Printing for a description of how to use this feature.) A screen displays showing the number of records matching your selection criteria. Click OK to continue or Cancel to return to the Worksheets screen.

15. If you clicked OK, the Input Screen (Fig.2) appears. Enter a title (Fig.2 - A) you want to appear on the worksheets, and click the OK button (Fig.2 - B).

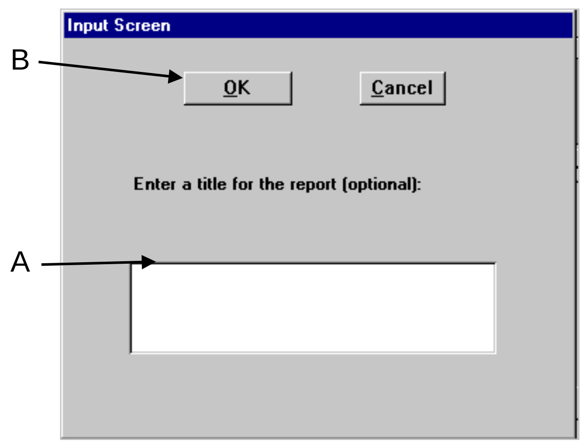


Fig. 2

15. Click the Done button (Fig.1 - G) to return to the Main Screen. You may also press the Esc key to return to the Main Screen.

CHAPTER 4 – DATA ENTRY

The Data Entry screen allows you to enter the results of your Worksheets into the database. It is an effective way to quickly enter data into multiple fields. You can first run a worksheet for a group of people (e.g., by Zip Code or one of your user-defined fields).Then, use that Worksheet # for data entry. The people appear in the same order as on the worksheet.

From the Main Screen, click the Data Entry button. The Data Entry screen (Fig.1) appears.

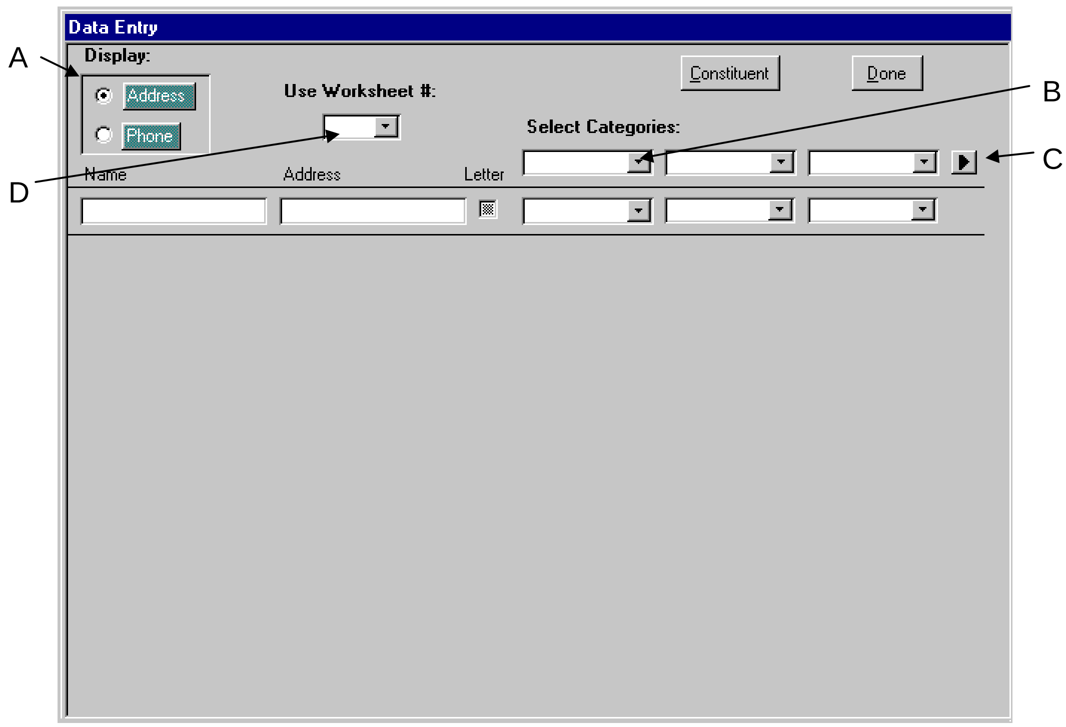


Fig.1

DISPLAYING A LIST OF CONSTITUENTS

1. In the Display box (Fig.1 - A),
   - Click Walk Sheet if you are entering information from a Walk Sheet.
   - Click Phone Sheet if you are entering information from a Phone Sheet.

2. If you are not entering information from user defined fields, skip this step. Select up to five user defined fields to display. To select these fields, choose a field from the drop down list (Fig.1 - B). Click the right arrow (Fig.1 - C) to display four more drop-down lists.

3. Type in the worksheet number or select it from the drop down list (Fig.1 - D). The list of constituents displays (Fig. 2).

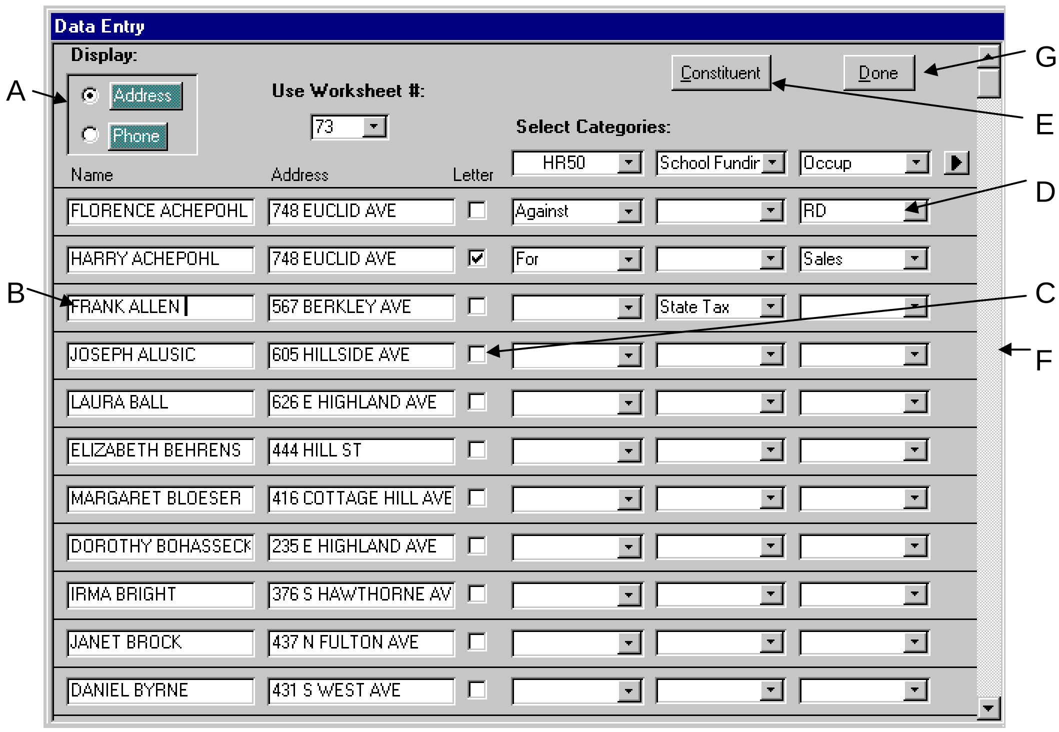


Fig.2

HINT - You can toggle between the display of phone numbers and addresses by clicking in the Display box (Fig.2 - A). Select Walk Sheet for address, or Phone Sheet for phone numbers. To change the constituents displayed from a Walk or Phone sheet, you must select the display first and then select the Worksheet.

If you decide to display user-defined fields after the data is displayed, you must repeat all steps. You cannot just select the user-defined fields.

ENTERING DATA

The list of constituents on the screen (Fig.2) is in the same order as they appear on your sheet.

Enter the information into the appropriate fields. You can either click the box or use the keyboard to navigate the screen. Use the ← and → keys to move from field to field; use the ↑ and ↓ keys to move from record to record. Also, press the TAB key to move right one field at a time. Hold down the SHIFT Key and press the TAB key to move left one field at a time.

Finding a Constituent in Your List

Sometimes you need to find a constituent in the middle of a multi-page list. To find the constituent on the screen,

1. Put the cursor in the Name field (Fig.2 - B).

2. Press the F3 key on your keyboard.

3. Type the last name of the constituent in the input box.

4. Click the OK button.

The cursor goes to the first match on the last name. If this is not the person you want, repeat steps 2-4 until you reach the correct person.

Entering Phone Numbers

To enter phone numbers, you must be displaying the phone sheet. To do this, click the Phone Sheet radio button in the Display box (Fig.2 - A). Then, change the phone number as you would change any field.

Phoning a Constituent

To phone a constituent, you must be displaying the phone sheet. To do this, click the Phone Sheet radio button in the Display box (Fig.2 - A). The Dialer button (Fig.3 - A) appears. Place the cursor anywhere on the line for the person you want to dial. Then, click the Dialer button.

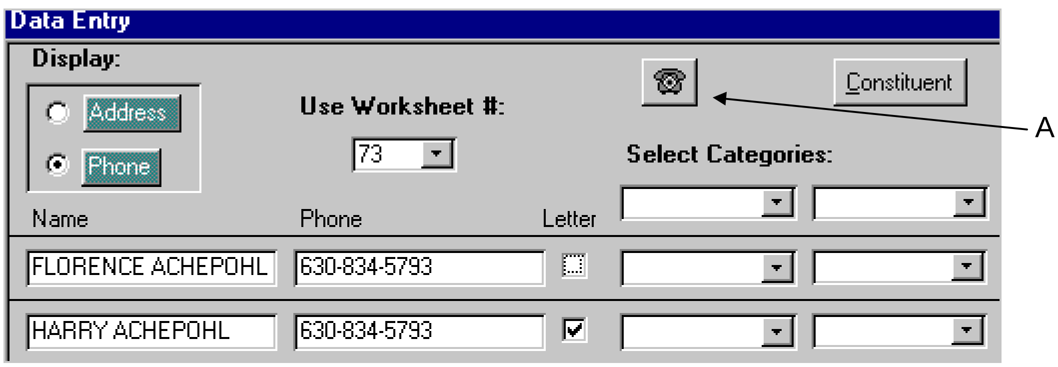


Fig. 3

Entering Data into Checkboxes

To enter information in the Letter box (Fig.2 - C), simply click the box. Or tab into it, and press the SPACE BAR. An X appears in the box, indicating that it has been selected. Repeat this procedure to unmark the box.

Entering Data in User-Defined Fields

As you tab into a user-defined field (Fig.2 - D), previously-specified values appear in the list. Select one of these values. If no values appear, you can enter any value. To get to the other user-defined fields, go to the rightmost user-defined field and press the TAB key. This allows you to scan through all of the user-defined fields. Use TAB to move forward and SHIFT-TAB to move backward in this section of the form.

Changing Other Constituent Information

If you need to change other constituent information, such as address, put the cursor in one of the fields for the constituent you need to change. Then, click the Constituent button (Fig.2 - E). The Constituent Search screen for that person appears. Make your changes and click the Save button.

Note - The Constituent button will not appear if you have logged in as Guest.

The Scroll Bar

The scroll bar (Fig.4 - F) can be used to move up and down the list if you need to skip a section of constituents.

Leaving the Data Entry Screen

Click the Done button (Fig.4 - G) to return to the Main Screen. You may also press the Esc key to return to the Main Screen.

CHAPTER 5 -- MAILING LABELS

The Mailing Labels screen can be used to produce mailing labels, form letters, mail merge export files or to export mailing information to a disk.

Constituent Service Software households your data. This process will take some time, but this helps prevent two pieces of mail from going to the same house. (If you do find two pieces of mail going to the same house, you can go to the Constituent Search screen, select the constituent and click the circle next to "No Mail" in the Miscellaneous section.)

To access this screen, choose Mail Labels/Letters from the Main Screen. The Mailing Labels screen (Fig.1) appears.

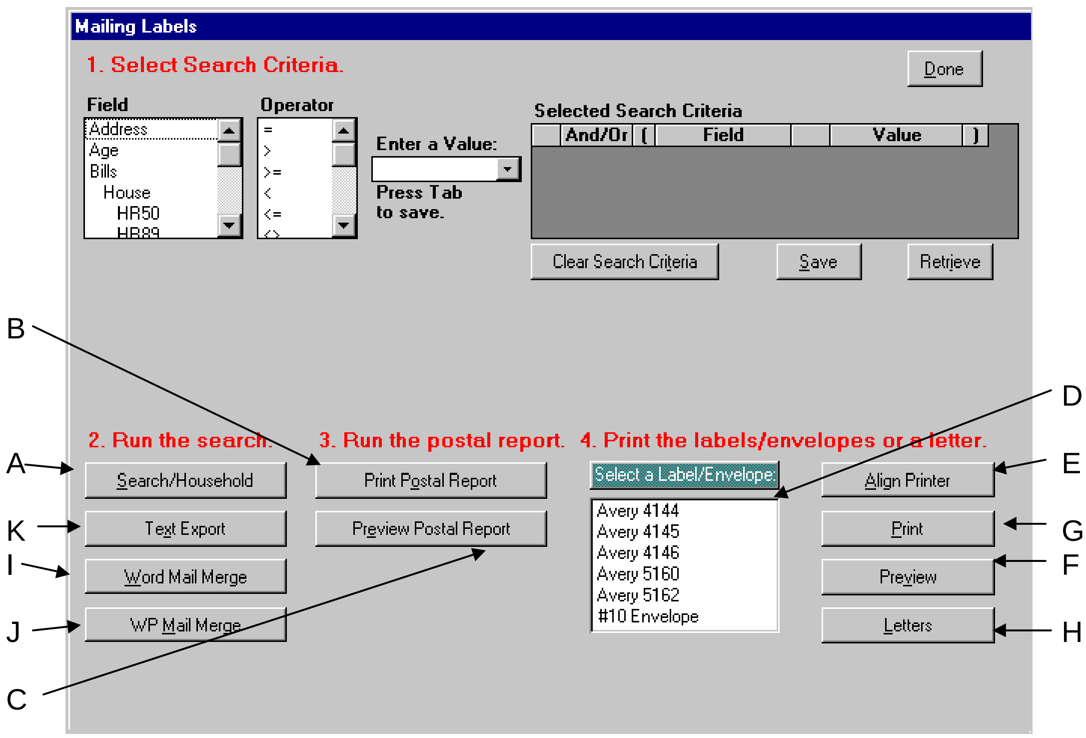


Fig.1

HOUSEHOLDING

1. Enter the search criteria for consitutents to be included in the mailing. (For more information on selecting search criteria, refer to Appendix 1 -- Selecting Search Criteria.)

2. Click the Search /Household button (Fig.1 - A). A box displays asking you to confirm your selections (Fig.2). **Please read this information carefully, because it will tell you exactly which constituents will be selected for the mailing.**

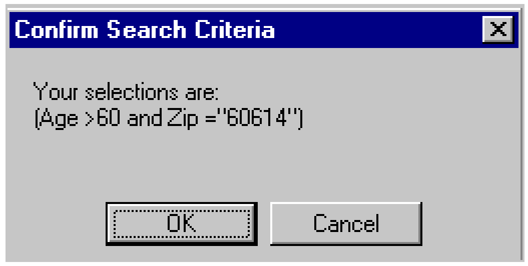


Fig. 2

3. Click the OK button if the search criteria are correct. You will then see a box indicating the total number of constituents in your selection. The total number in the selection is in direct proportion to the time the householding takes. The more constituents you have selected, the longer the householding takes. (Estimate 1 minute per 5000 constituents.)

4. Click OK to the confirmation if the total number is acceptable. Otherwise, click the Cancel button. The Run Householding? screen (Fig.3) appears.

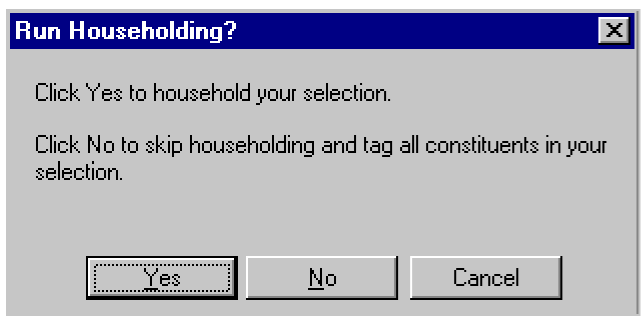


Fig. 3

4. Click the Yes button to household your selection.
   (or)
   Click the No button to skip householding and send the mailing to all selected constituents.

Caution! - Once householding has started, let it go to completion. Turning off your computer during this process will damage the database.

After the householding is complete, a screen displays showing the total number of households in the mailing. Use this number to make sure you have enough labels or mail pieces.

Once a selection is householded, it is stored in the database until the next time you household. Therefore, you can run householding one day and print labels the next day as long as you do not re-run householding in between.

POSTAL REPORT

Click the Print Postal Report button (Fig.1 - B) to print (or the Preview Postal Report button (Fig.1 - C) to preview) a report for the post office showing how many automation and nonautomation mail pieces in each rate category are going to each zip code. This is required by the post office for the lowest possible postal rates.

The Postal Report is based on a postal sort. This sort has to be done once after each new householding. If you have already done a postal sort after the last householding, you do not have to run the sort again.

PRINTING LABELS, ENVELOPES OR FORM LETTERS

Selecting a Label/Envelope

Select a label from the Select a Label/Envelope list (Fig.1 - D). Avery 4144 and 4145 are continuous labels for dot matrix printers and do not print postal barcodes. Avery 4146 labels are continuous labels for dot matrix printers and do print postal barcodes. Avery 5160 is for labels for laser and inkjet printers and does not print postal barcodes. Avery 5162 is for labels for laser and inkjet printers and does print postal barcodes. The #10 Envelope choices print directly onto #10 envelopes and give you the option to print or not to print barcodes.

The labels/envelopes that print postal barcodes are based on a postal sort. This sort has to be done once after each new householding. If you have already done a postal sort after the last householding, you do not have to run the sort again.

When you preview or print labels/envelopes, you will get an option to print ‘OR CURRENT RESIDENT.’

Aligning Printer

If using continuous labels, click the Align Printer button (Fig.1 - E). This will print XXXXX's across a few labels to let you line align the labels in the printer.

Previewing Labels

Click the Preview button (Fig.1 - F) to view the labels before you print them. (See the Print Preview section in Appendix 3 -- Printing for more information.)

Printing Labels

Click the Print button (Fig.1 - G) to print the labels. Be sure that you have the correct printer selected in the Windows Control Panel under Printers. Also, you can turn off Print Manager in the Control Panel to speed up the printing process. To reprint labels that jammed during printing, use the Preview function. At the bottom of the Preview screen, you can type the page number that you need to redo in the Page field. Then, print only the needed pages.

Form Letters

Click the Letters button (Fig.1 - H) to print form letters. The letters will be addressed to the households in your search. (See Chapter 7 for information on Form Letters.)

When you run the Letters, you will be asked if you will be using labels/envelopes with postal barcodes. This is to determine the sort order of the letters. The labels/envelopes that print postal barcodes are based on a postal sort. This sort has to be done once after each new householding. If you have already done a postal sort after the last householding, you do not have to run the sort again.

EXPORTING DATA

You can export your data to external word processing programs to allow greater flexibility with mailing options. This can include more complex form letters, labels, etc. You can also export a text file to send to a mail house.

Fields for word processing are exported in the following order:

1. Informal Name: 'First Name' or 'Last Name + Family'
2. Formal Name: 'Mr./Ms. + Last Name' or 'Last Name + Family'
3. Full Name: 'Mr./Ms. + First Name + Last Name' or 'The + Last Name + Family'
4. Street Address
5. City, State Zip
6. Carrier Route
7. Delivery Point Code
8. County
9. Township
10. Precinct
11. Phone

Word Mail Merge

Click the Word Mail Merge button (Fig.1 - I) to export the mailing information into a file which can be read by Microsoft Word. When you click this button, it saves the information to a file named wordmail.doc in the c:\elect directory. It overwrites any previous Word Mail Merge file which exists, and you will lose the old data.

To use this file, go into Microsoft Word. From the Tools menu, select Mail Merge and follow the instructions. When it asks you to Get Data, select Open File and choose c:\elect\wordmail.doc. (See your Microsoft Word manual for more information.)

WordPerfect Mail Merge

Click the WP Mail Merge button (Fig.1 - J) to create a file to be used with WordPerfect Merge. The file, wpmail.txt, is placed in the c:\constit directory and will overwrite any existing file with this name. This is a tab-delimited text file.

To use this file,

1. Open WordPerfect for Windows.

2. Open the wpmail.txt file and select Convert File Format.

3. In the Convert File Format dialog box, select ASCII Delimited Text as the file format. Click the OK button.

4. Enter information in the Import Data dialog box:

   a. Select ASCII Delimited Text for the Datatype.

   b. Select Merge Data File for Import As.

   c. Select Tab for Delimiters/Field.

5. Click OK.

6. After the file is imported, save the file under another file name. (See your WordPerfect manual for more details.)

Text Export

Click the Text Export button (Fig.1 - K) to create a comma-delimited text file that can be sent to a mail house. The fields are in this order:

1. Informal Name: ‘First Name’ or ‘Last Name + Family’
2. Formal Name: ‘Mr./Ms. + Last Name’ or ‘Last Name + Family’
3. Full Name: ‘Mr./Ms. + First Name + Last Name’ or ‘The + Last Name + Family’
4. Street Address
5. City
6. State
7. Zip
8. Plus Four
9. Carrier Route
10. Delivery Point Code
11. Line of Travel (LOT)
12. Direction

CHAPTER 6 -- USER-DEFINED FIELDS

Constituent Service Software allows you to add an unlimited number of fields that you can customize to track different issues, constituent concerns, occupations, casework, etc.

To use this feature, click the Maintenance button on the Main Screen and then click Categories on the Maintenance screen. The Categories List screen (Fig.1) appears.

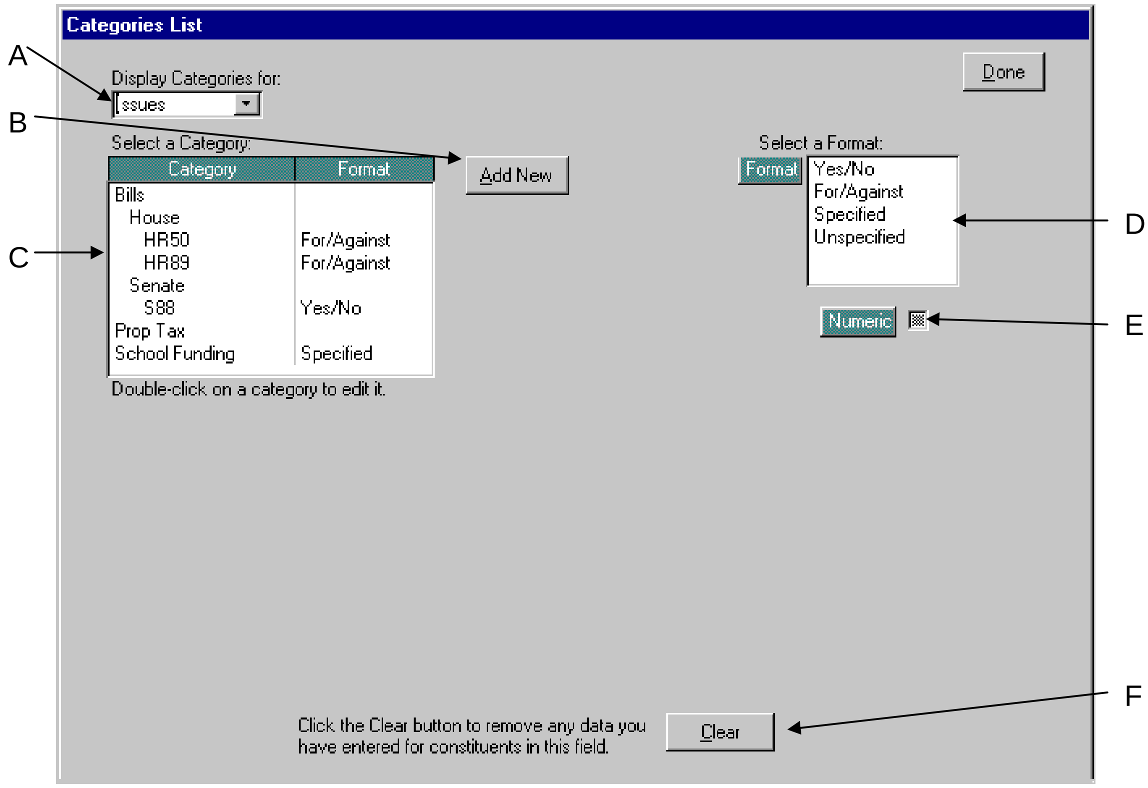


Fig.1

ADDING USER-DEFINED FIELDS

To add a new field (category),

1. Select the section from the Section drop-down list (Fig.1 - A) to view existing categories in that section. The User Fields section is used for general tracking on the Constituent Search or Data Entry screens. The Issues section is used to track constituents' stances on issues. The Casework section is used to track casework done for constituents.

2. Click the Add New button (Fig.1 - B). The Categories screen (Fig.2) appears.

3. Select the section from the Section drop-down list (Fig.2 - A) in which you want this category to appear.

4. Click in the Category field (Fig.2 - B) and enter a category.

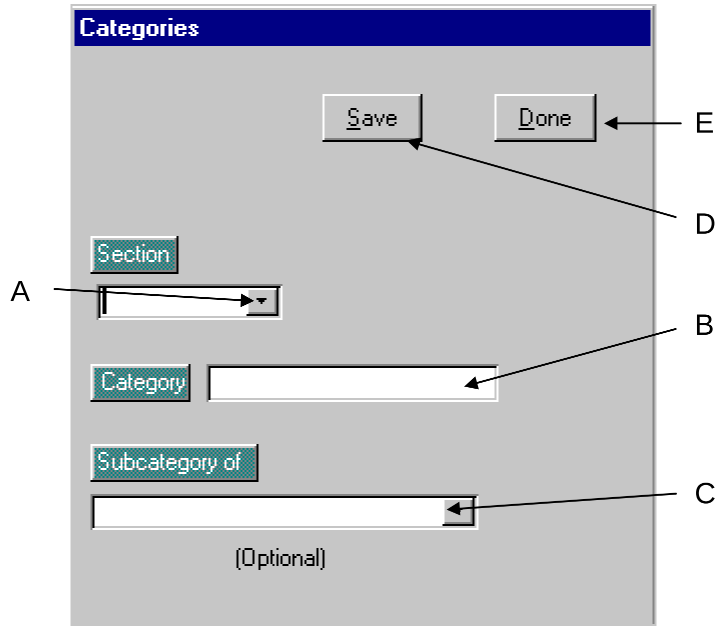


Fig.2

5. If you would like the category to be a subcategory of another category (that you have already entered), choose that category from the drop down list (Fig.2 - C).

6. Click the Save button to save the name. (Fig.2 - D).

7. Click the Done button (Fig.2 - F) to return to the Categories List.

8. Click the field you have just added in the Select a Category List (Fig.1 - C).

9. Select a format for the field from the Select a Format list (Fig.1 - D). You have four choices for field formats:
    a. Yes/No
    b. For/Against
    c. Specified
    d. Unspecified

- If you select one of the first two choices, you are limited to those possibilities in that field. If you chose option a or b, there are no additional criteria to define.

- Option c, Specified, means that you will provide a list of values appropriate for that field. To do so, click Specified in the Select a Format list. Please see the Working with Specified fields section at the end of this chapter for more information about working with Specified fields.

- Option d, Unspecified, means that there is an unlimited range of possible values. If you choose Unspecified, there are no additional criteria to define.

10. If you would like the program to treat the field as a number, click in the square next to Numeric (Fig.1 - E). This allows you to treat your data as numbers rather than text. The text string ‘20’ is considered to be greater than ‘100’, but the numeric ‘100’ is greater than ‘20’. Be careful which fields you are designating as numeric. Zip codes are not numeric; they are a text string of numbers. Currency and counts are numeric.

EDITING USER-DEFINED FIELDS

Changing a Category

1. Select the section from the Section drop-down list (Fig.1 - A) to view existing categories in that section.

2. Double-click a Category in the Select a Category list (Fig.1 - C). The Categories screen (Fig.3) appears.

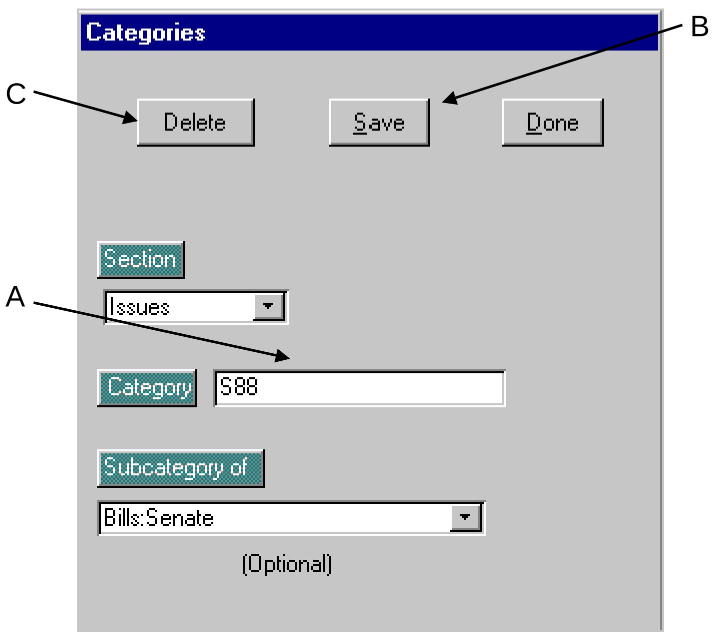


Fig. 3

3. Type over the old name in the Category field (Fig.3 - A).

4. Click the Save button (Fig.3 - B).

Deleting a Category

1. Double-click a Category in the Select a Category list (Fig.1 - C). The Categories screen (Fig.3) appears.

2. Click the Delete button (Fig.3 - C).

Caution! - Do not delete a category if it has subcategories. If you want to delete a category and all its subcategories, you must delete each individual subcategory.

Changing a Category Format

1. Select the Category in the Select a Category list (Fig.1 - C).

2. Select another format from the Select a Format list (Fig.1 - D).

Clearing Data from a User-Defined Field

If you are done with a user-defined field, you can clear all constituent data for this field by clicking the Clear button (Fig.1 - F).

Caution! - This button clears your database of all information in this category. It is often helpful to keep this information for a long time, so clear the fields only if you need to.

If you have subcategories, the data is probably in the subcategory fields. You must select the subcategory to delete the data.

WORKING WITH SPECIFIED FIELDS

Follow the instructions for adding a User-Defined Field earlier in this chapter. Click on the Category. Select Specified as the format if not already selected. The 'Values for this Field' section appears on the User-Defined Fields screen (Fig.4). (Remember only fields with the Specified format will have values.)

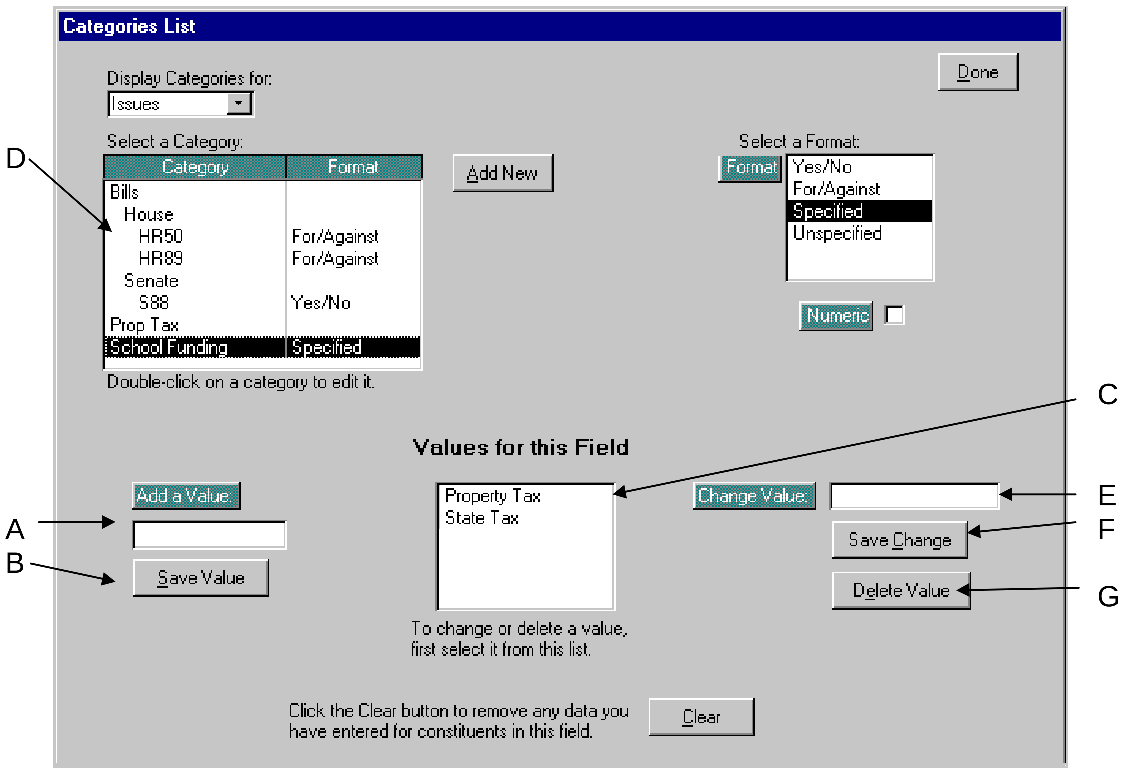


Fig.4

Adding a Value

1. Click in the Add a Value box (Fig.4 - A) and type in the value.

2. Click the Save Value button (Fig.4 - B) to add the value to the list of Values (Fig.4 - C) in the center of the screen.

Changing a Value

1. Select the field in the Select a Field list (Fig.4 - D).

2. Select a value from the Values list (Fig.4 - C).

3. Type your new value in the Change Value box (Fig.4 - E).

4. Click the Save Change button (Fig.4 - F). This will change only the possible values displayed for this field. It will not affect any data already entered into the database.

Deleting a Value

1. Select the field in the Select a Field list (Fig.4 - D).

2. Select a value from the Values list (Fig.4 - C).

3. Click the Delete Value button (Fig.4 - G).
4. Click Yes at the prompt to delete the value.

CHAPTER 7 -- FORM LETTERS

Constituent Service Software allows you to write and send many different form letters. To use this feature, click the Maintenance button on the Main Screen and then click Form Letters on the Maintenance screen. The Form Letters screen appears.

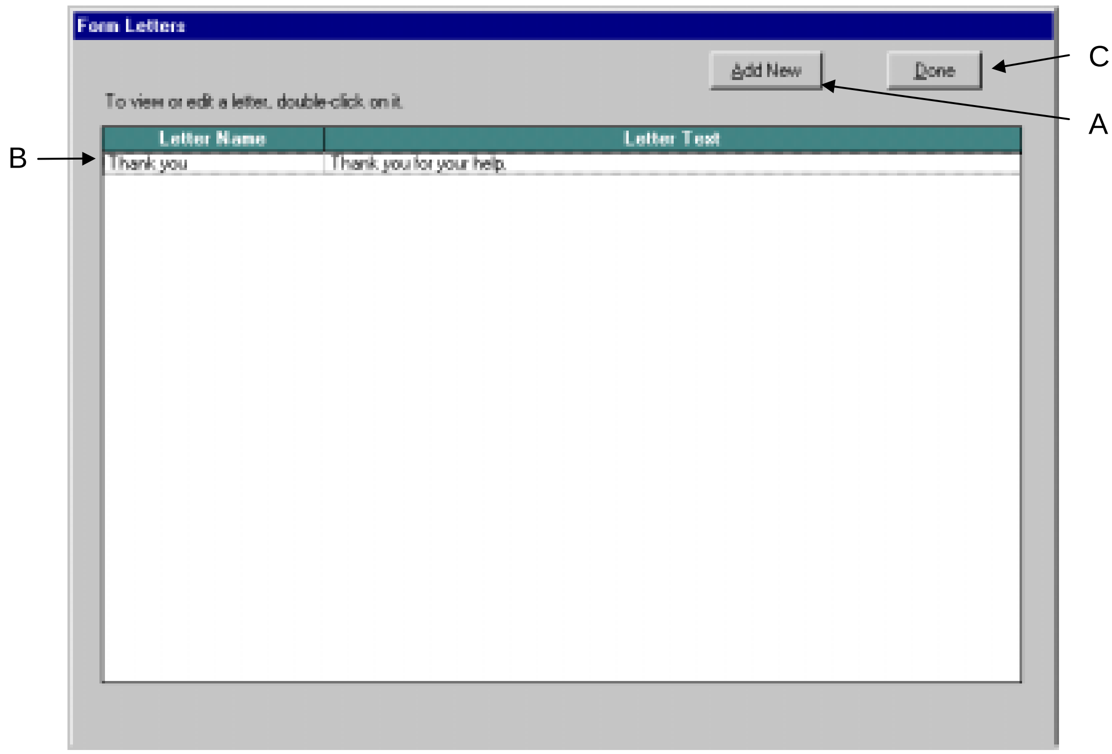


Fig.1

ADDING A LETTER

1. Click the Add New Button (Fig.1 - A). This brings up the Letter Text screen (Fig.2) where you can name your letter and type in the text.

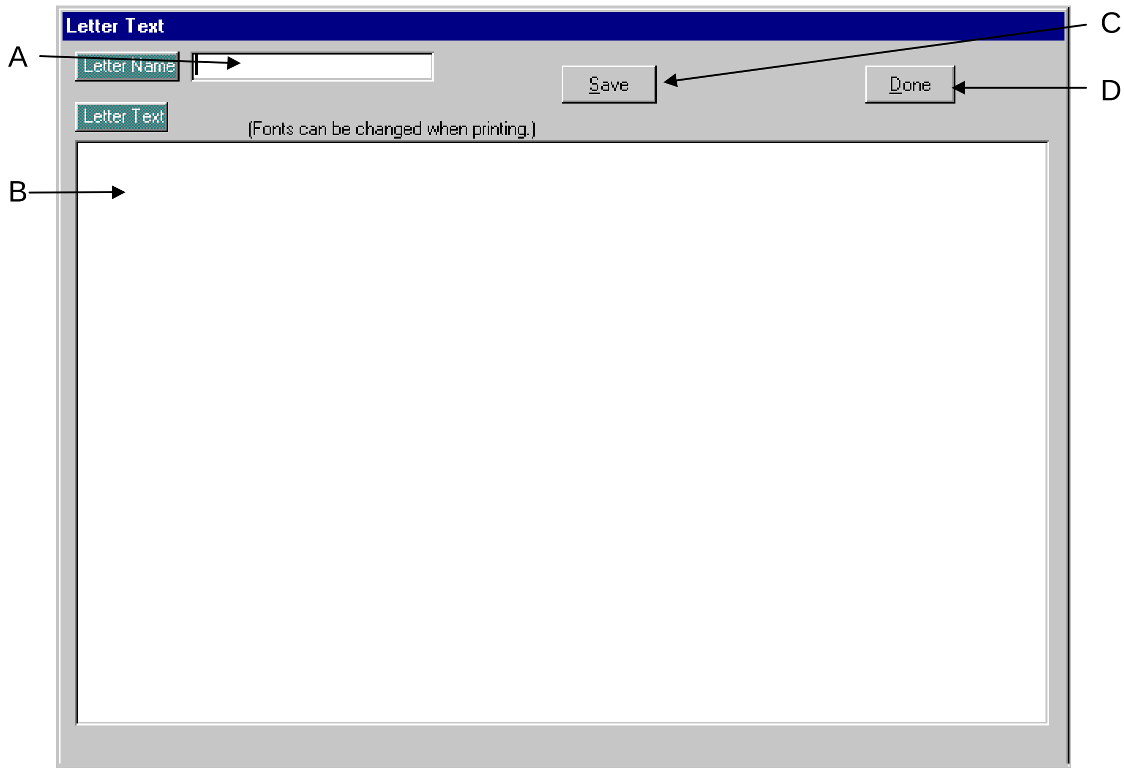


Fig.2

2. Click in the Letter Name field (Fig.2 - A) and type in a name for the letter.

3. Tab to the Letter Text box (Fig.2 - B) and type in the text of your letter. Always begin your letter in the upper left hand corner of the Letter Text box.

Note - The letter text appears on this screen in the default font. You can change the font and size when you print the letter. Refer to the Printing Form Letters section in this chapter.

4. Click the Save button (Fig.2 - C) to save the letter. If you do not save it, it will not be available to use later.

5. When you are done entering your letters, click the Done button (Fig.2 - E) to return to the previous screen.

To exit the Form Letters screen, click Done (Fig.1 - C). The Main Screen appears.

EDITING A LETTER

To edit a letter already on the list (Fig.1 - B), double-click the letter in the list to bring up the Letter Text screen (Fig.3). You will then be able to edit it. When you have finished, click the Save button (Fig.3 - A).

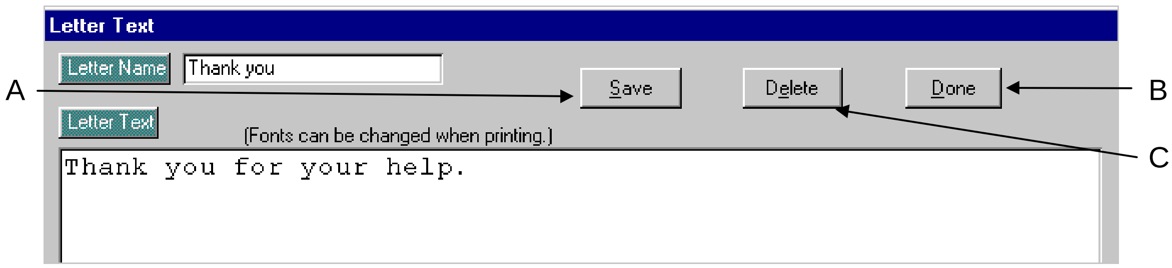


Fig.3

When you are done editing your letters, click the Done button (Fig.3 - B) to return to the previous screen.

To exit the Form Letters screen, click Done (Fig.1 - C). The Main Screen appears.

DELETING A LETTER

To delete a letter already on the list (Fig.1 - B), double-click the letter in the list to bring up the Letter Text screen (Fig.3). Click the Delete button (Fig.3 - C). Click Yes at the prompt to delete the letter.

To exit the Form Letters screen, click Done (Fig.1 - C). The Main Screen appears.

PRINTING FORM LETTERS

To print form letters,

1. Click the Mail Labels/Letters button on the Main Screen. The Mailing Labels screen appears (Fig.4).

2. Select the search criteria by following the instructions Appendix 1.

3. Click the Search/Household button.

4. Click the Letters button.

You can then preview or print the letters. Letters are printed on 8½” x 11” paper, and you can choose the amount of space you need for your letterhead and margins. You can also choose formal or informal style. The greeting in the letter for the informal style is ‘Dear First Name.’ (If the First Name is a single initial, the informal greeting is ‘Dear Mr. (or Ms.) Last Name.’) The greeting in the letter for the formal style is ‘Dear Mr. (or Ms.) Last Name.’ For families, both styles are ‘Dear + Last Name + Family.’ In addition, the formal style contains an address with ‘Mr. (or Ms.) + First Name + Last Name’ or ‘The + Last Name + Family.’ You can also select the font for the letter. Refer to the example in the next section for more details.

Example

In the following example we will send a letter to all families who live in Zip Code 60101.

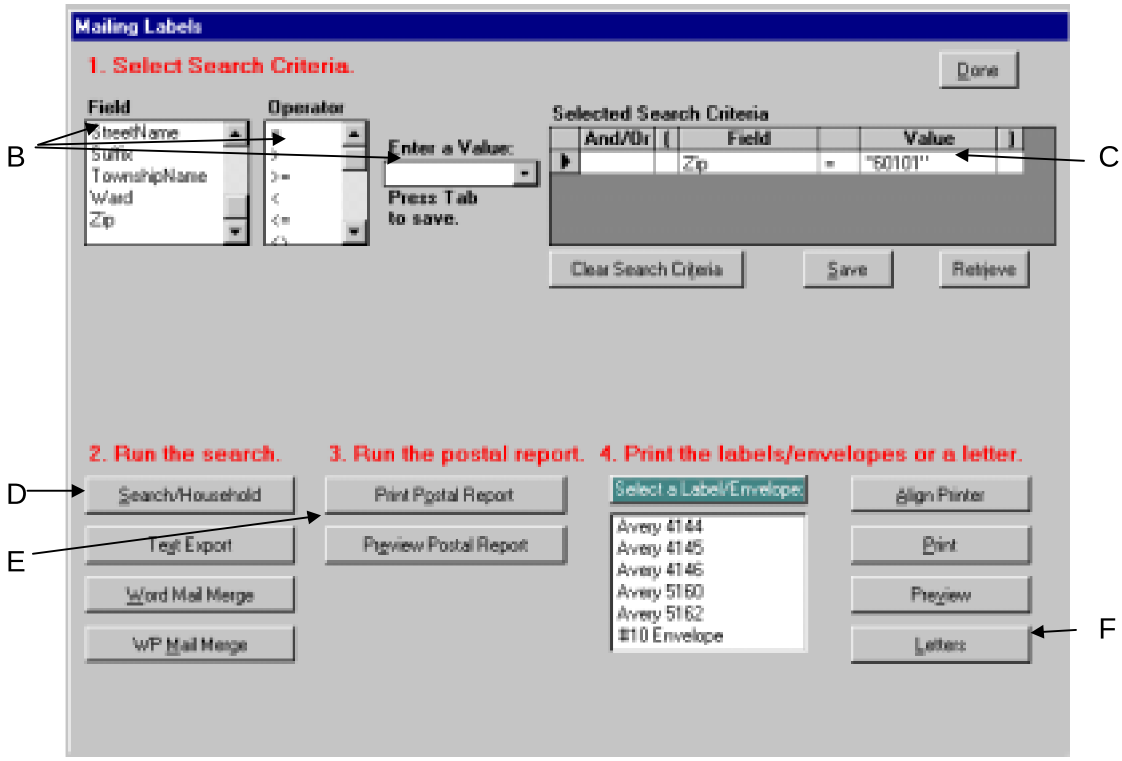


Fig.4

1. From the Main Screen, click the Mail Labels/Letters button.

2. Use the Field, Operator, and Value areas (Fig.4 - B) of the screen to select "Zip = 60101". Press the Tab key. The Selected Search Criteria (Fig.4 - C) box should now read “Zip=60101.”

3. Run the Search/Household (Fig.4 - D) to ensure no two pieces are going to the same home.

4. Run the Postal Report, if needed (Fig.4 - E).

5. Click the Letters button at the bottom right of the screen (Fig.4 - F). You are asked if you will be using labels/envelopes with postal bar codes for these letters. If yes, you are asked if you need to run a special postal sort. This needs to be run only once for the current householding, and you may have already run it for the postal report. Finally, the Letters screen displays (Fig.5).

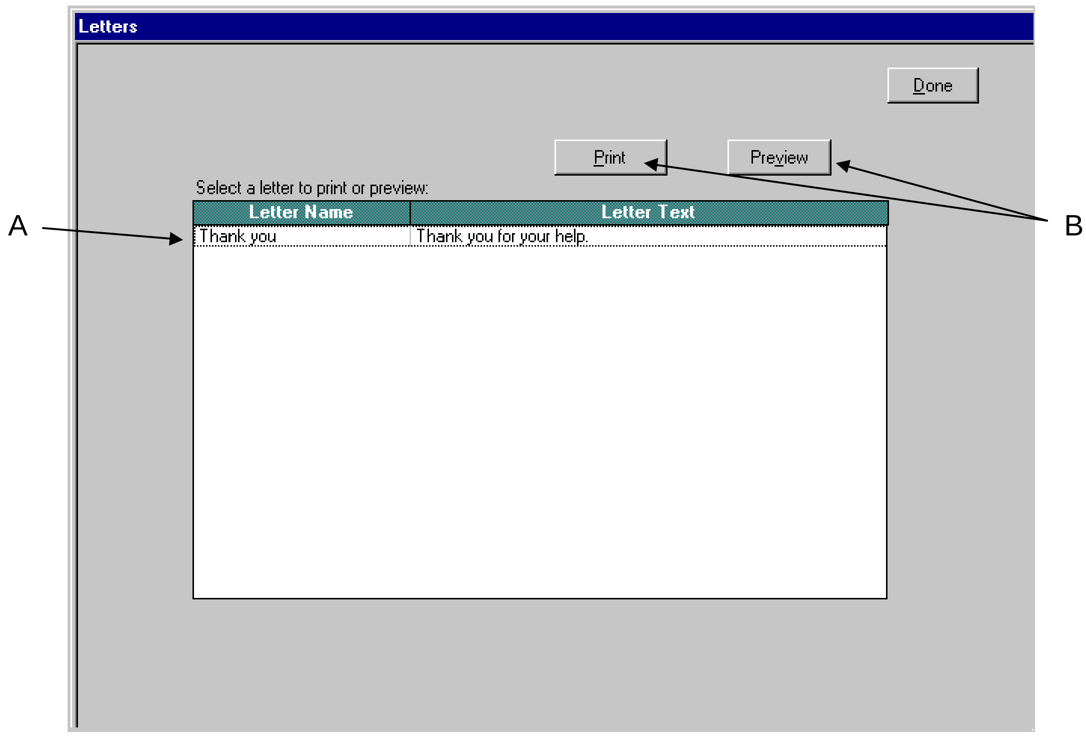


Fig.5

6. Click a letter in the list (Fig.5 - A). (You may also double-click a letter to view or edit its text.)

7. Click the Preview or Print button (Fig.5 - B) to preview or print the letters. The Choose Letter Style screen (Fig.6) displays.

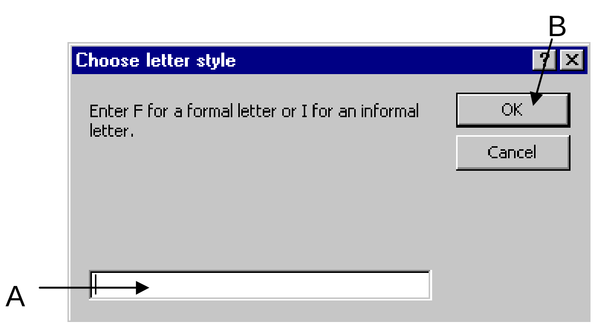


Fig. 6

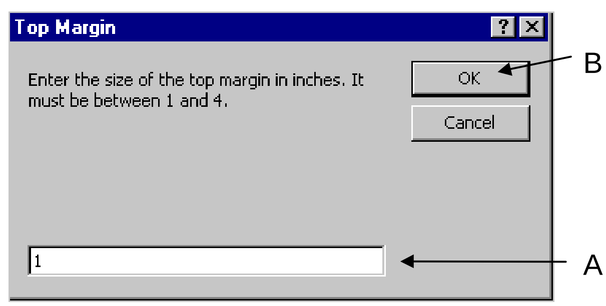


Fig. 7

9. Enter F for formal style or I for informal style (Fig.6 - A) and click the OK button (Fig.6 - B).

10. Enter the size of the top margin in inches (Fig.7 - A) and click the OK button (Fig.7 - B).

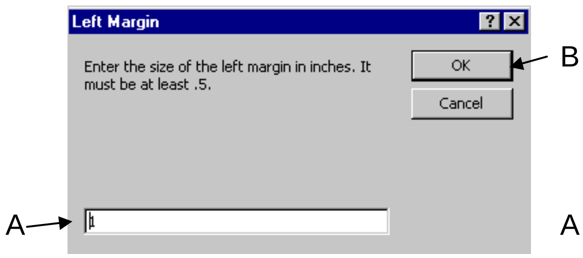


Fig. 8

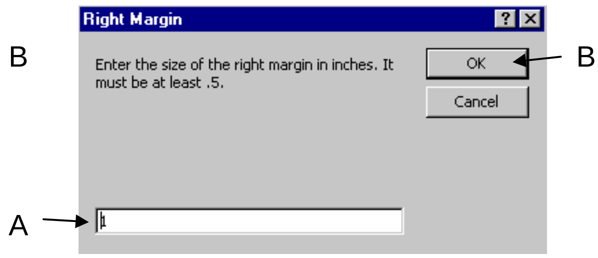


Fig. 9

11. Enter the size of the left margin in inches (Fig.8 - A) and click the OK button (Fig.8 - B).

12. Enter the size of the right margin in inches (Fig.9 - A) and click the OK button (Fig.9 - B).

13. Select a font from the font list (Fig.10 - A) and a size from the size list (Fig.10 - B). A sample of the font and size you selected appears in the Test Your Font box (Fig.10 - C). Click the OK button (Fig.10 - D).

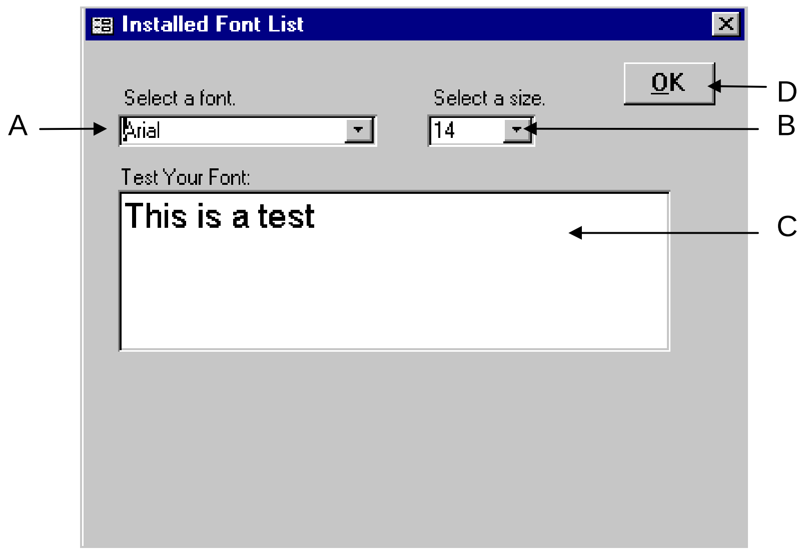


Fig. 10

To return to the Main Screen, click Done as many times as necessary.

Hint - If you wish to print labels or envelopes to accompany your form letters, you do not need to rerun the search. The computer always saves the last mail sort, so your labels or envelopes will match the form letters exactly.

CHAPTER 8 -- ISSUES

In this section of the program, you can view and edit constituents' stances on issues. To enter a new stance for a constituent, you must go through the Constituent Search screen. (For more information, refer to the Issues subsection in Chapter 2 -- Constituent Search.)

To view and/or edit the Issues list,

1. On the Main Screen, click the Issues button or hold down the Alt key while pressing the I key. The Issue List screen (Fig.1) displays.

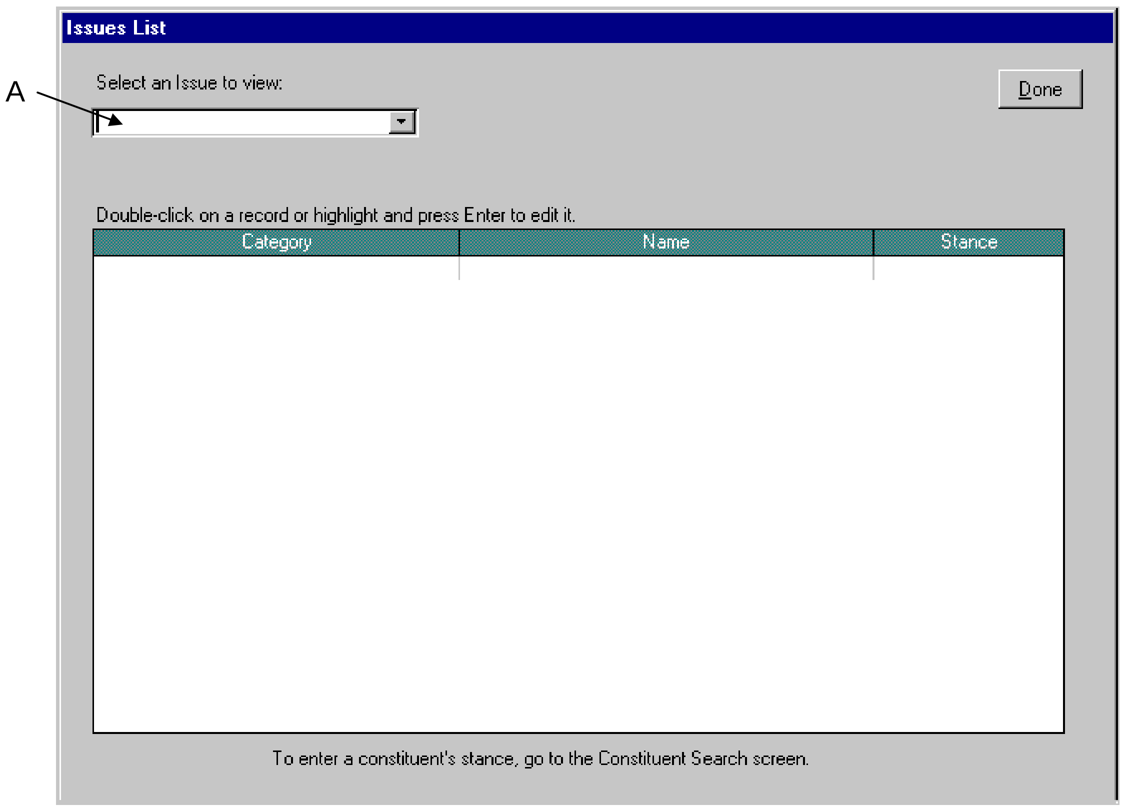


Fig. 1

2. Select an issue from the Select an Issue to view drop-down list (Fig.1 - A). Records for that category display (Fig.2). If you select a subcategory, only records for that subcategory display. If you choose a category that has subcategories, all records for that category and its subcategories display.

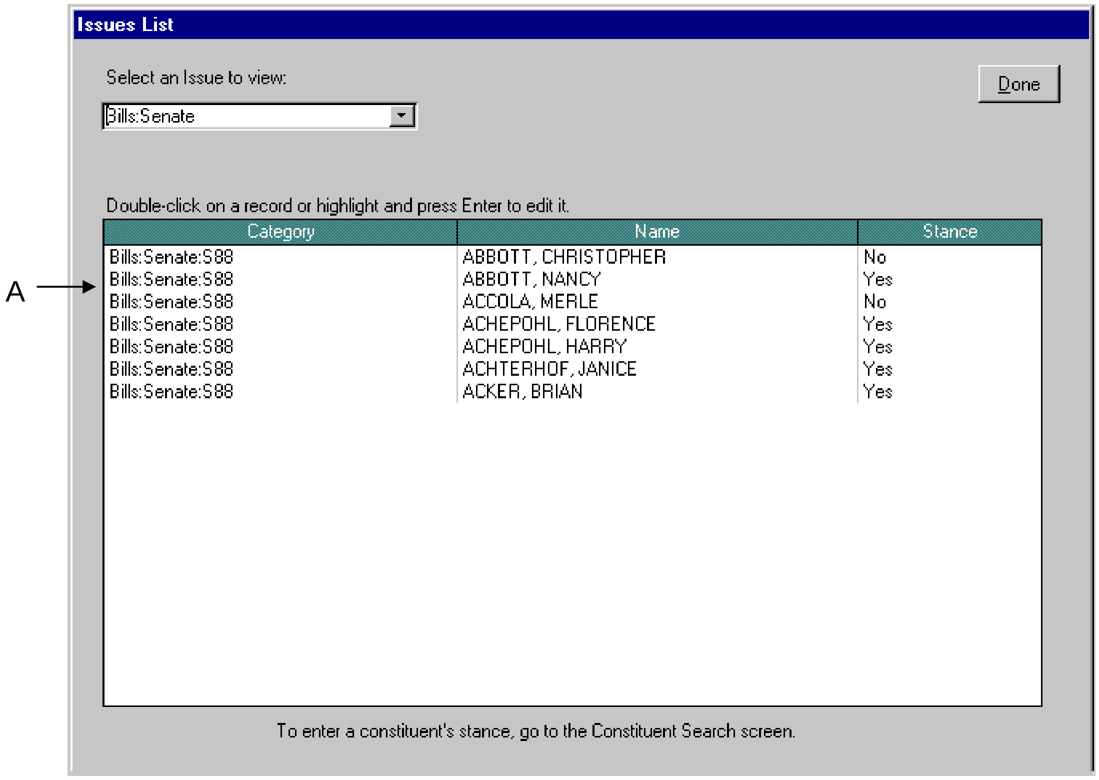


Fig. 2

3. Double click on a record in the list (Fig.2 - A). The Issues screen (Fig.3) displays.

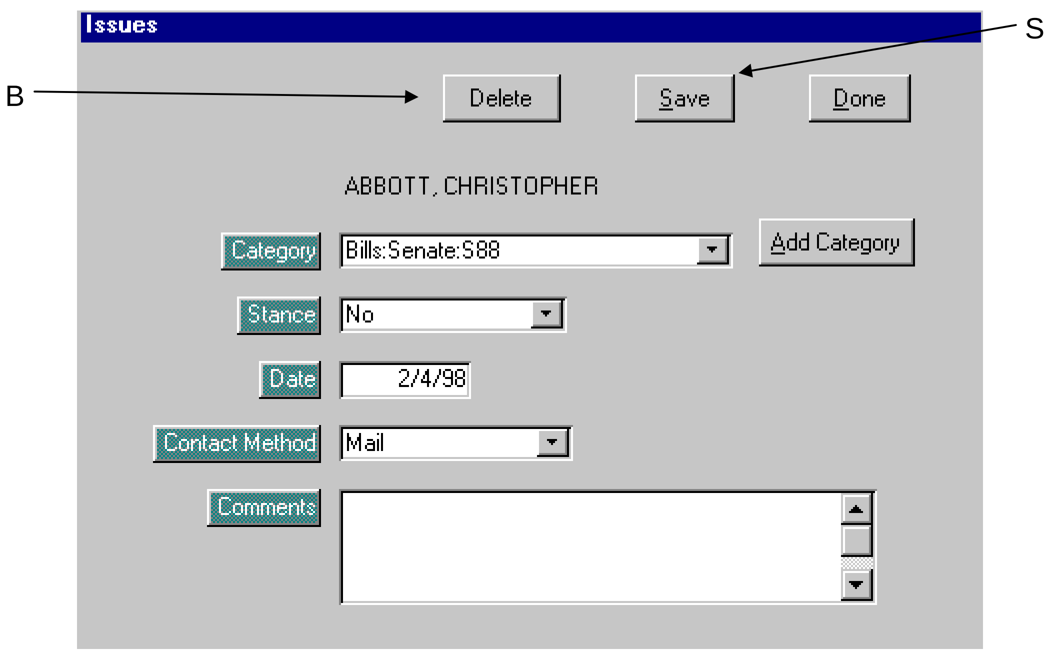


Fig. 3

4. Make changes and click the Save button (Fig.3 - A) to save the record.
   (or)
   Click the Delete button (Fig.3 - B) to delete the record.

CHAPTER 9 -- CASEWORK

In this section of the program, you can track constituents' probems and the actions you've taken on them. To enter a new case for a constituent, you must go through the Constituent Search screen. (For more information, refer to the Casework subsection in Chapter 2 -- Constituent Search.)

VIEWING/EDITING CASEWORK

To view and/or edit the Casework list,

5. On the Main Screen, click the Issues button or hold down the Alt key while pressing the K key. The Casework List screen (Fig.1) displays.

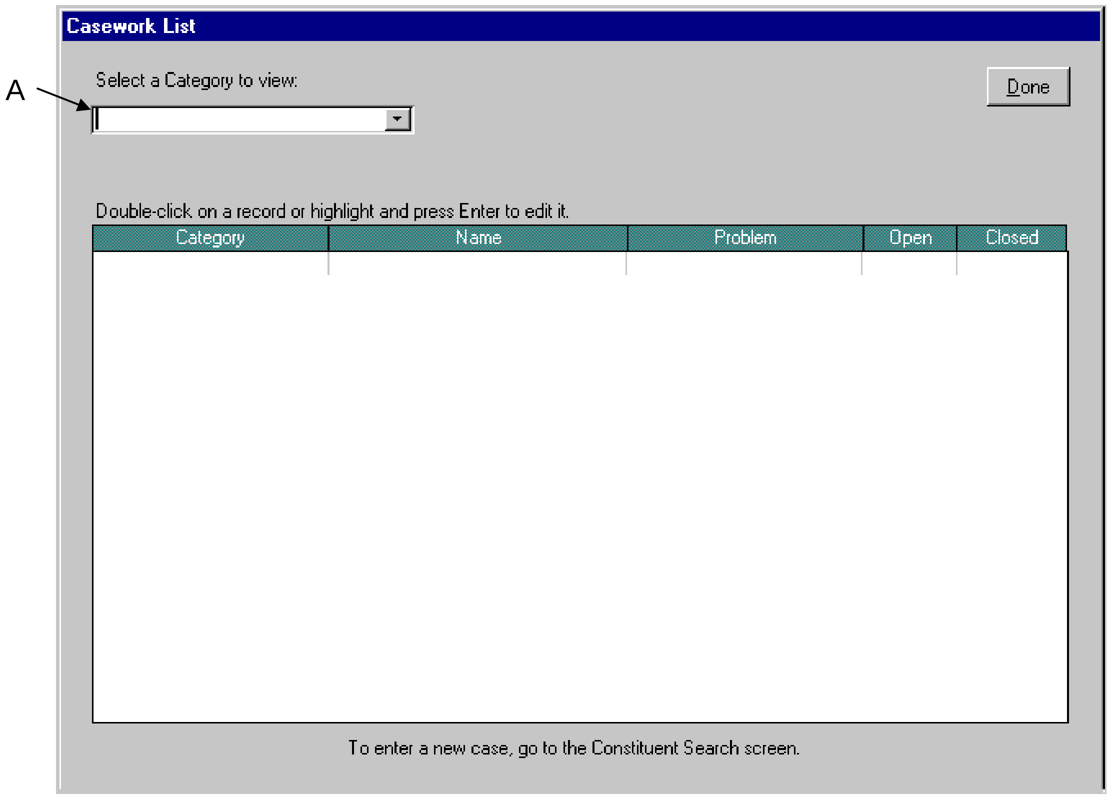


Fig. 1

6. Select a category from the Select a Category to view drop-down list (Fig.1 - A). Records for that category display (Fig.2). If you select a subcategory, only records for that subcategory display. If you choose a category that has subcategories, all records for that category and its subcategories display.

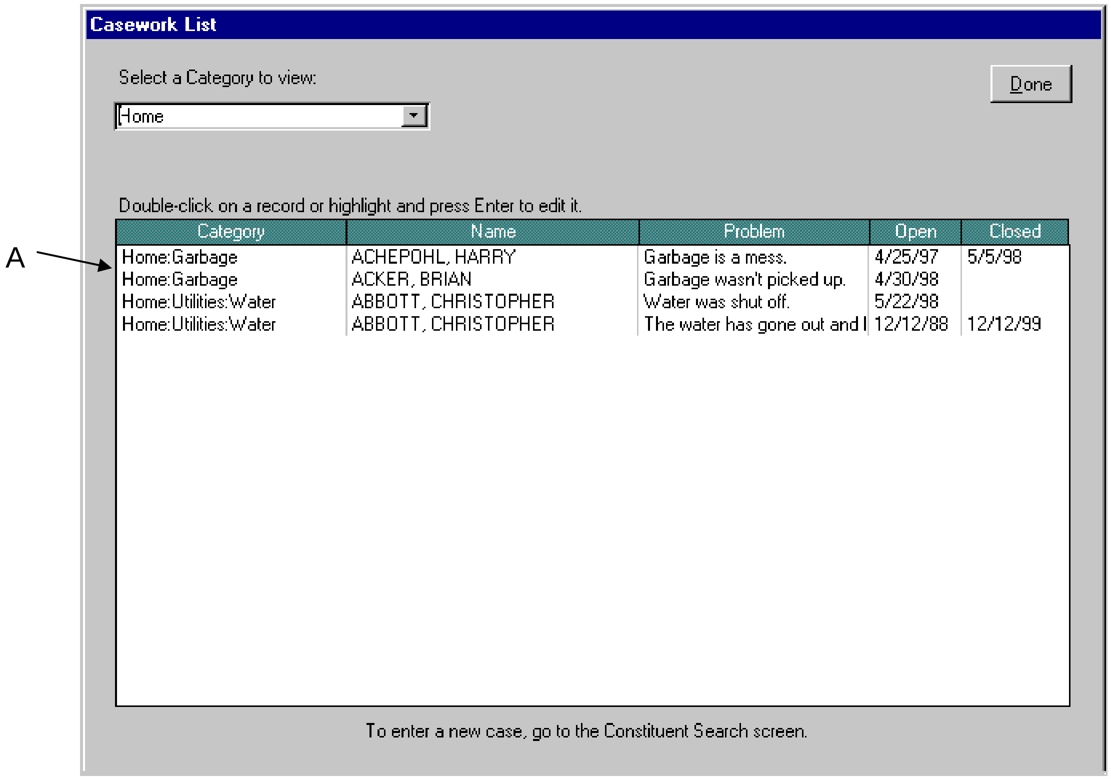


Fig. 2

7. Double click on a record in the list (Fig.2 - A). The Cases screen (Fig.3) displays.

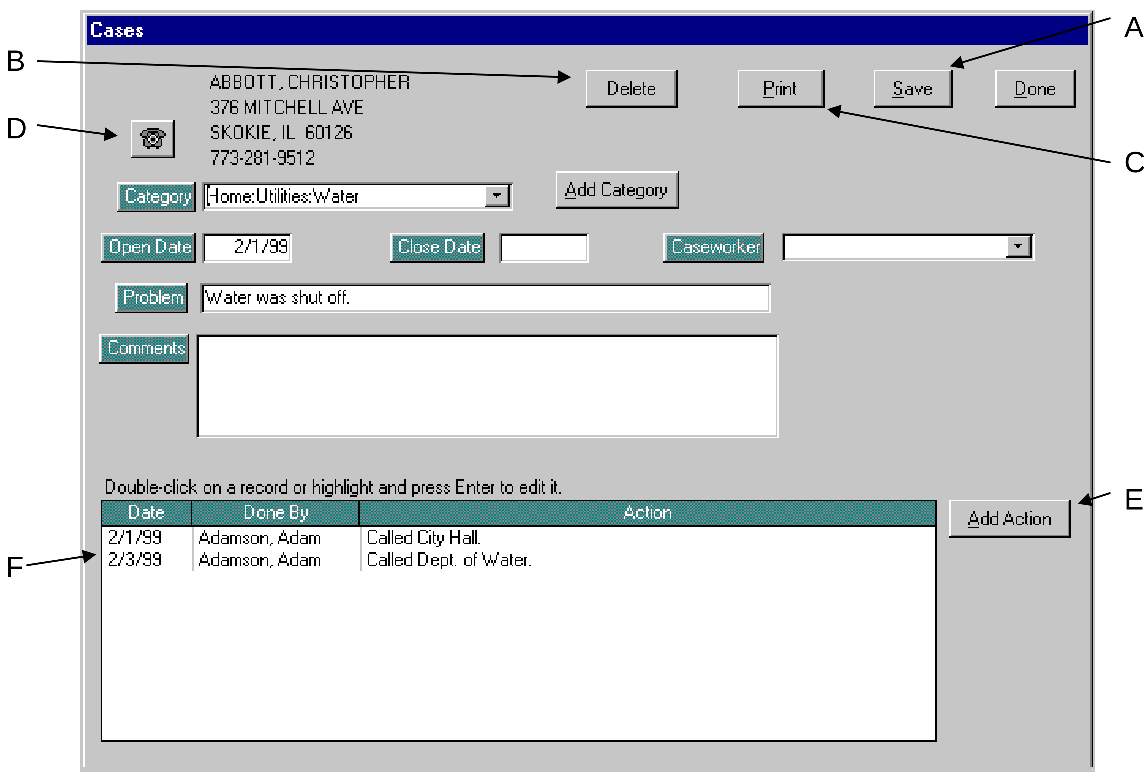


Fig. 3

8. Make the appropriate changes.

9. Click the Save button (Fig.3 - A) to save the record.
   (or)
   Click the Delete button (Fig.3 - B) to delete the record.

You can print out a report of the case and all actions by clicking the Print button (Fig.3 - C).

You can automatically phone a constituent if you have a modem and are able to use a phone receiver on the same phone line as the modem. Be sure the modem is already functioning properly.

To phone a person from the Cases screen,

4. Click the Phone button (Fig.3 - D).

5. Click the OK button on the AutoDialer window.

6. As the call is dialing, pick up the receiver.

CASEWORK ACTIONS

To add actions for casework,

5. Click the Add Action button (Fig.3 - E) on the Cases screen. The Case Actions screen (Fig.4) appears.

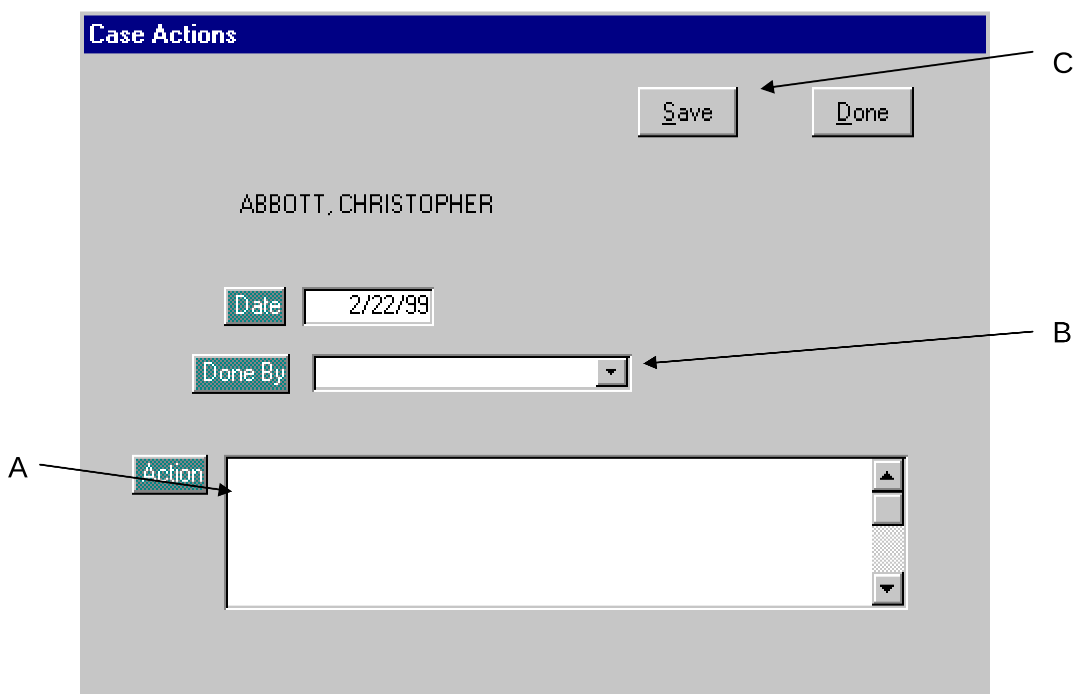


Fig. 4

6. Enter the Action (Fig.4 - A) that was done.

7. Optionally, select the name of the person who performed the action from the Done By drop-down list (Fig.4 - B).

8. Click the Save button (Fig.4 - C) to save the record.

To edit an action for casework,

4. Double-click an action in the list (Fig.3 - F) on the Cases screen.

5. Make the appropriate changes.

6. Click the Save button to save the record.
   (or)
   Click the Delete button to delete the record.

CHAPTER 10 -- REPORTS

Clicking the Reports button on the Main Screen displays the Report Selection screen (Fig.1).

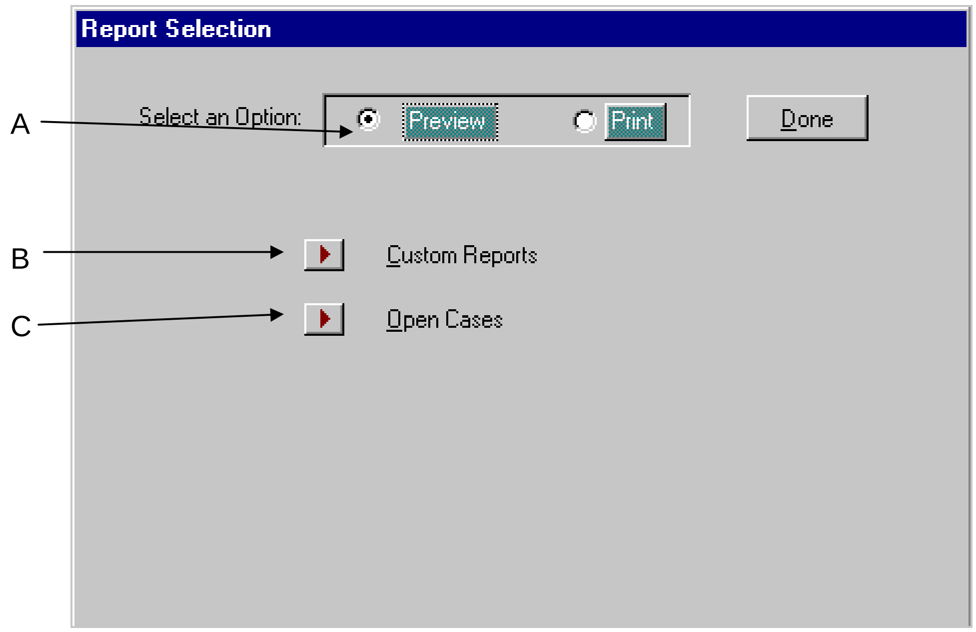


Fig.1

1. In the Select an Option box (Fig.1 - A), select/click Preview or Print to either preview the reports or to print them. This will apply only to the Open Cases report.

2. Click the arrow next to the report name to select the report you would like to preview or print.

CUSTOM REPORTS

Using the Custom Reports Feature, you can select which fields to print on your report. To print a custom report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the R key. The Report Selection screen (Fig.1) appears.

2. Click the Custom Reports button (Fig.1 - B) or hold down the Alt key and press the C key. The Custom Reports screen (Fig.2) appears.

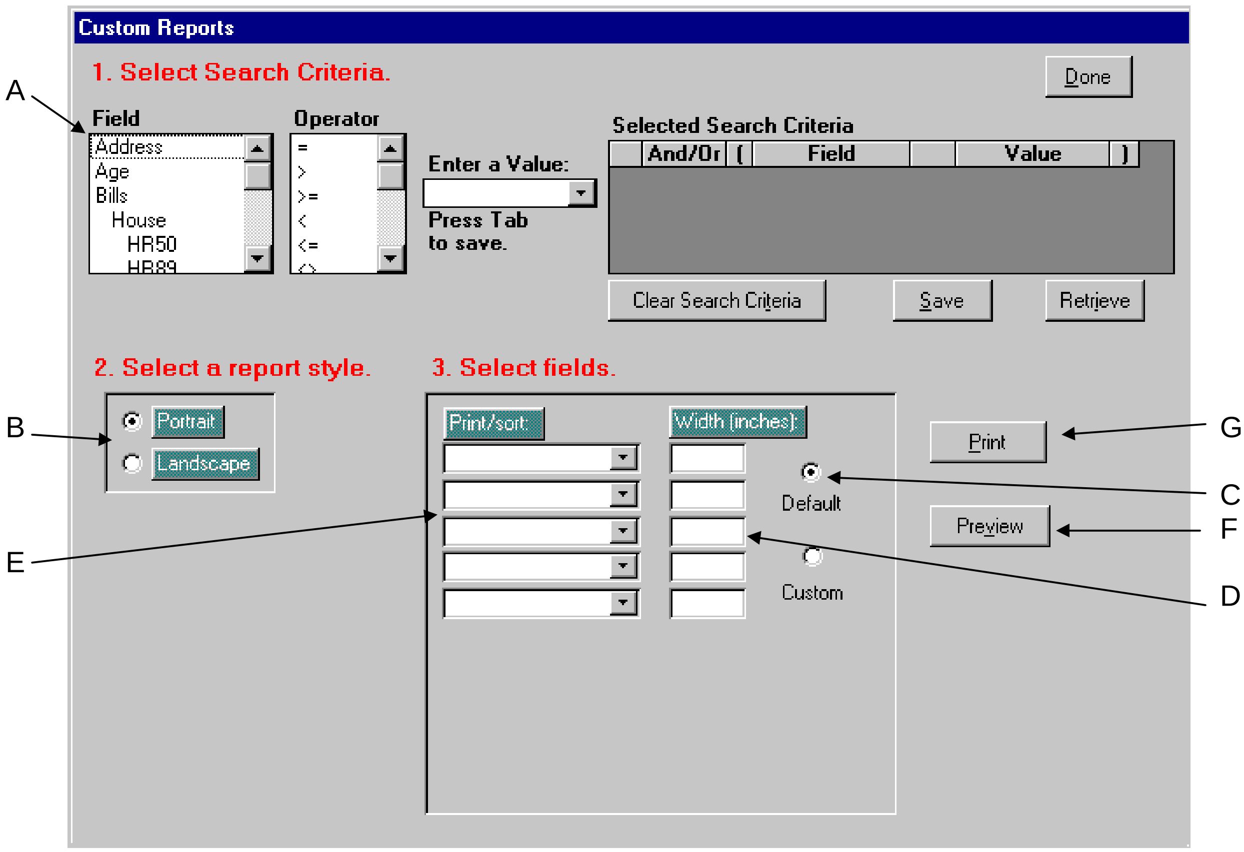


Fig. 2

3. Select your search criteria in the 'Select search criteria' section (Fig.2 - A). (For more information of selecting search criteria, refer to Appendix 1 -- Selecting Search Criteria.)

4. Select a report style (Fig.2 - B). Portrait reports allow up to seven fields, while landscape reports allow up to ten fields.

5. Select either default or custom field widths (Fig.2 - C). The default setting allows five fields for portrait and seven fields for landscape reports. All fields widths are 1.5 inches. The custom setting allows seven fields for portrait and ten fields for landscape reports. You must manually enter the widths for each field (Fig.2 - D).

6. Select the fields you want to appear on the report (Fig.2 - E). The report sorts on each field listed.

7. Click the Preview button (Fig.2 - F) to preview the report
 (or)
Click the Print button (Fig.2 - G) to print the report.

OPEN CASES

The Open Cases report prints out a page for each open case and includes detail about the case and a list of actions done for that case.

To print an open cases report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the R key. The Report Selection screen (Fig.1) appears.

2. Click the Open Cases button (Fig.1 - C) or hold down the Alt key and press the O key. The Open Cases report either prints or previews depending on which option you chose (Fig.1 - A).

CHAPTER 11 -- MAINTENANCE

CHANGING YOUR PASSWORD

To change your password,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

2. Click the Change Password button or hold down the Alt key and press the P key. The Change Password screen (Fig.1) appears.

3. Type your current password into the first text box (Fig.1 - A).

   NOTE - Passwords are case-sensitive.

4. Type your new password into the second text box (Fig.1 - B).

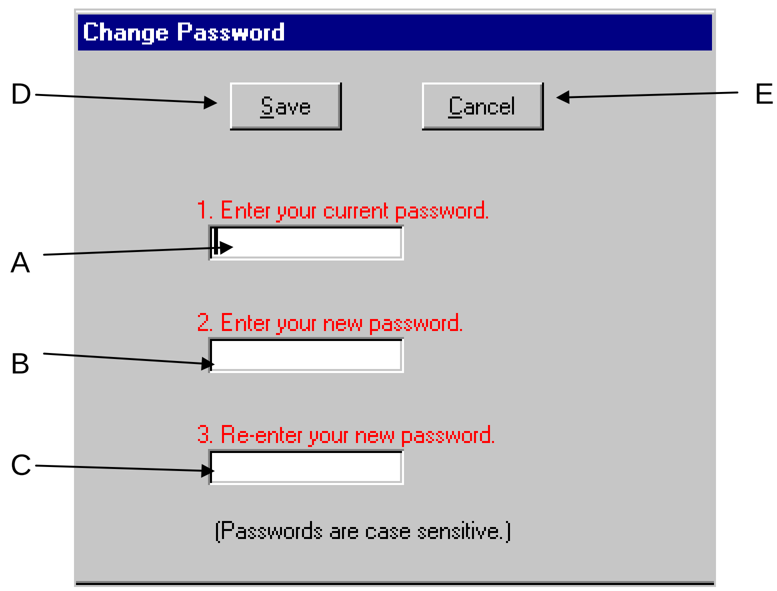


Fig. 1

5. Confirm your new password by re-typing it into the third text box (Fig.1 - C).

6. Click the Save button (Fig.1 - D) to save your changes.
   (or)
   Click the Cancel button (Fig.1 - E) to cancel your changes.

Caution! - Write down your password and keep it out of the open but in a place you can remember. If you forget your password, you will not be able to get back into the program.

CASEWORKERS

In this section of the program, you can enter the names of people who work in the office. This list of names appears in the Casework section. To get into this section of the program,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

2. Click the Caseworkers button on the Maintenance screen or hold down the Alt key and press the C key. The Caseworker List screen (Fig.2) appears.

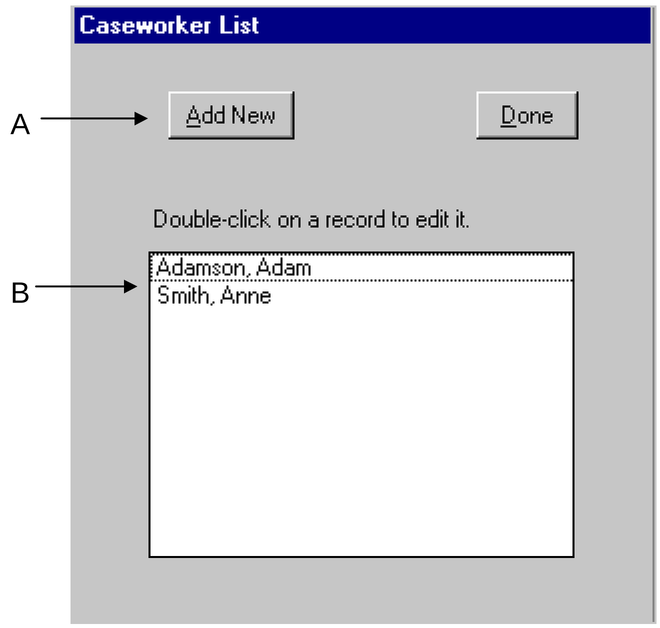


Fig. 2

To add a caseworker,

1. Click the Add New button. The Caseworkers screen (Fig.3) appears.

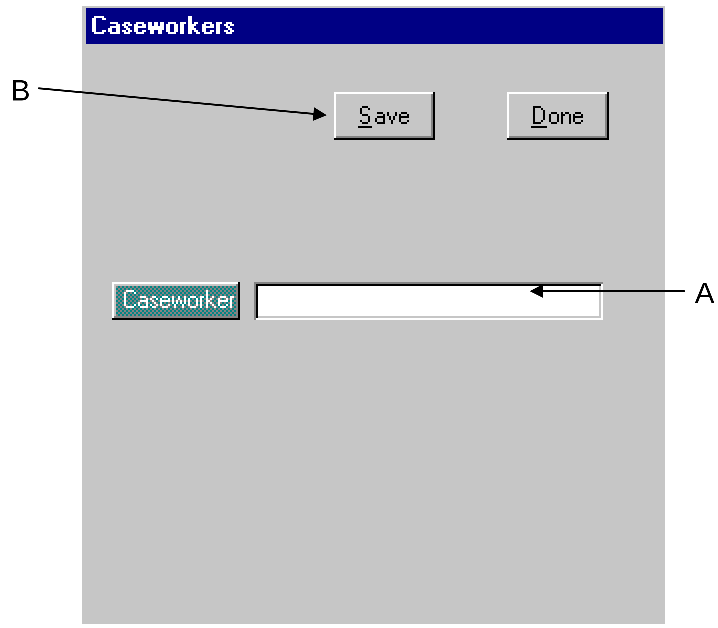


Fig. 3

2. Enter the name of the caseworker (Fig.3 - A).

3. Click the Save button (Fig.3 - B) to save the record.

To edit or delete a casworker record,

1. Double-click on an employee in the list (Fig.2 - B). The Caseworkers screen (Fig.4) appears.

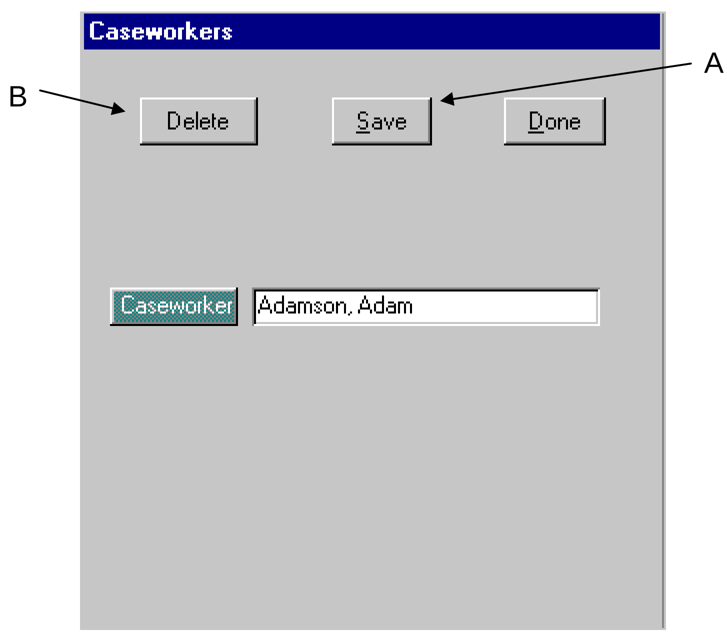


Fig. 4

2. Make the changes.

3. Click the Save button (Fig.4 - A) to save the record.
   (or)
   Click the Delete button (Fig.4 - B) to delete the record.

UPDATE FIELDS

This feature allows you to update specific fields (e.g., CarrierRoute) with new data from Arcos Software. To perform the update,

1. Make a backup of your database (c:\constit\consdata.mdb).

2. Follow the instructions that come with the diskette to install the new data files.

3. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

4. Click the Update Fields button or hold down the Alt key and press the U key.

5. Answer the confirmation prompts as they appear on the screen.

APPEND USER FIELDS

This feature allows you to append non-standard information (occupation, etc.) into your user-defined fields. This can only be used with information that comes from Arcos Software.

To perform the Append,

1. Make a backup of your database (c:\constit\consdata.mdb).

2. Follow the instructions that come with the diskette to install the new data files.

3. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

4. Click the Append User Fields button or hold down the Alt key and press the N key.

5. Answer the confirmation prompts as they appear on the screen.

COMPLETE CONSTITUENT UPDATE

This feature allows you to perform a complete constituent update with new data from Arcos Software. This process updates your current constituents based on an ID. If the ID in the new data matches an ID in the old data, that record is updated with the new data.

If the ID in the new data does not match an ID in the old data, that new constituent record is added to your database. In cases where an old ID does not match a new ID, the old record is deleted if there is no case history for it. Therefore, you will see the same constitutent listed twice if its ID is not in the new file and it has some case history. You should manually update the old record with the new informaton and delete the new record.

If you have added constituent records manually to your database, those records will not have an ID that matches the new data. Therefore, those records are deleted. To prevent those records from being deleted, you can click the Keep box on the Constituent Search screen (For more information, refer to Chapter 2 - Constituent Search).

To perform the update,

1. Make a backup of your database (c:\constit\consdata.mdb).

2. Follow the instructions that come with the diskette to install the new data files.

3. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

4. Click the Complete Constituent Update button or hold down the Alt key and press the M key.

5. Answer the confirmation prompts as they appear on the screen.

APPEND NEW CONSTITUENTS

This allows you to append (add) constituents to your database. This may be done to increase the geographic area of your database or to add recently registered constituents. This feature will not make changes to any of your existing constituent information.

To perform the append,

1. Make a backup of your database (c:\constit\consdata.mdb).

2. Follow the instructions that come with the diskette to install the new data files.

3. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

4. Click the Append New Constituents button or hold down the Alt key and press the A key.

5. Answer the confirmation prompts as they appear on the screen.

EXPORTING USER-DEFINED FIELDS/ISSUES

This function allows you to export a file containing categories for user-defined fields and issues along with constituent values for these categories. This file can then be imported into supported software programs.

To create the export file,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the A key. The Maintenance screen appears.

2. Click the Export User Fields/Issues button or hold down the Alt key and press the X key.

3. Answer the confirmation prompts as they appear on the screen.

APPENDIX 1 -- SELECTING SEARCH CRITERIA

In many sections of Constituent Service Software, you can choose which constituents are included on worksheets, reports or mailings. All of these screens have the same search layout.

Select your search criteria or retrieve previously saved search criteria. Leaving this section blank gives you every constituent in the database.

Setting up new search criteria

1. Use Field the box directly under "Other Criteria" on the left of the screen to select a field to search on (Fig.1 - A). This box lists all fields, including your user-defined fields. Click the field you want to search by. It will be highlighted with black.

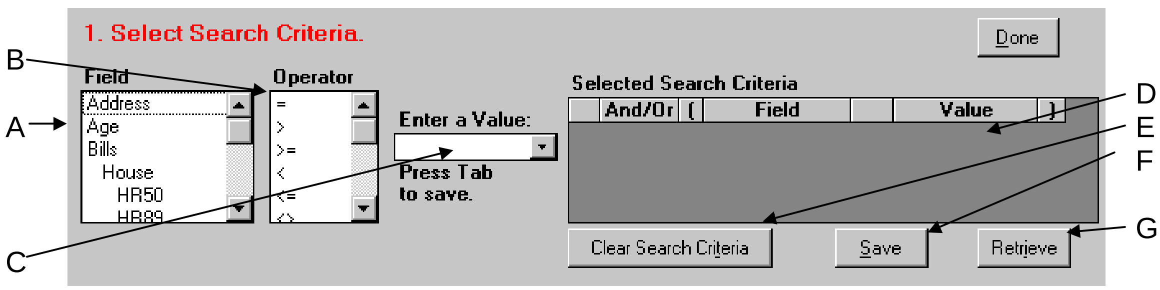


Fig. 1

2. Select an operator from the Operator list (Fig.1 - B). This determines how your selected field will be searched. The operators are:

=	equal to
>	greater than
>=	greater than or equal to
<	less than
<=	less than or equal to
<>	not equal to
Either	meets either of several criteria for a field
Is Null	used to search for empty fields
Is Not Null	used for finding any value in a field
Like	like

Use the Is Null operator to search for empty fields. For example, you can find constituents who have not expressed an opinion on one of your listed issues. First, select that issue from the Field list. Then select is null from the operator list and press the Tab key.

Use the Is Not Null operator to search for any constituent who has a value in that field. For example, you could find all of the people you have contacted regarding their views on a new airport (whether they are for or against it). First, select your field from the Field list. Then, select Is Not Null from the operator list and press the Tab key.

Use the Either operator to search for constituents who meet one of several criteria for one field. For example, you can find constituents who live in any of several zip codes. Select the Zip field. Then, select the Either operator. Next, enter a value. Press the Tab key and the *Add Another Value?* message appears. Click the Yes button and add enter another value. After you have entered your last Zip, click the No button on the *Add Another Value?* Message.

Use the 'Like' operator for wildcard searches using an asterisk (*). For example, to find all constituents born in October, choose BirthDate, select 'like' from the operator list and enter 10/*/* in the value section (see step c.). Or, to select all constituents with last names beginning with B, select 'like' and type B* in the value section. Be careful using this operator; it can sometimes return unexpected results.

3. Now, enter a value (Fig.1 - C). For many fields, the Enter a Value drop-down list will already have a listing of possible values. Click the down arrow (↓) and you will have a list of possible values for this field (or tab into the box for the list to open up). In fields with many possible values (such as Age), simply type a value into the box.

4. Once you have selected a field, an operator and a value, press the TAB key to move the information into the Selected Search Criteria box on the right side of the screen (Fig.1 - D).

5. You may now go back and repeat steps a-d as many times as necessary to limit the scope of your selection. In this example (Fig.2), Age>=60 and Zip=60614 means that only constituents 60 years of age and older living in Zip Code 60614 will be selected.

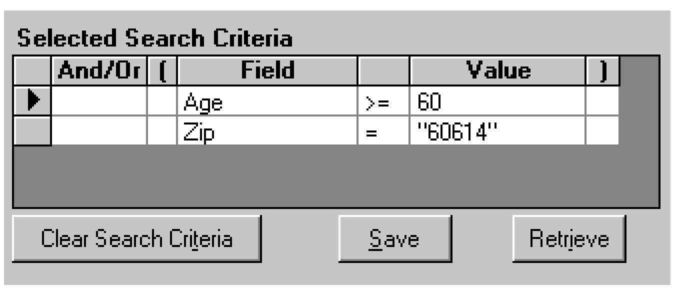


Fig. 2

6. To clear your selections and begin a new search, click the Clear Search Criteria button (Fig.1 - E). You can also correct mistakes in the search value you entered by changing it in the Selected Search Criteria box. Be careful to change only the values and not the special characters (", #) that are automatically entered for each entry.

Including OR in your searches

When you add search criteria to the Selected Search Criteria box, Constituent Service Software assumes there is an AND before each line. If you need to use OR in your searches, you must type directly into the Selected Search Criteria box. For example, if you wanted to select individuals who were over 60 and live and either Zip Code 60614 or 60657, you would need to enter OR in the And/Or columns for the appropriate search criteria. To do so,

a. Place the open parenthesis in the open parenthesis column (Fig.3 - A) at the beginning of the selection in which you would like OR to be used by placing your cursor in the column and typing **(**.

b. Type the word 'or' into the And/Or column (Fig.3 - B) on all lines which the parentheses will contain.

c. At the end of the selection, place a closed parenthesis in the closed parenthesis column (Fig.3 - C) by placing your cursor in the column and typing **)**.

Hint - Use OR searches cautiously. If you don't set up the criteria correctly, you will get unexpected results. You can use the Either operator for many OR searches.

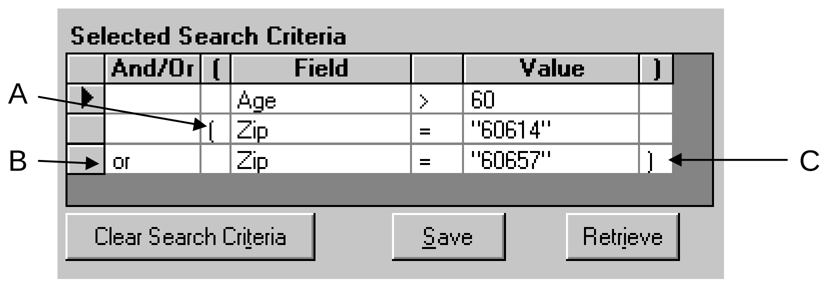


Fig. 3

Including User-Defined fields in your searches

If you have subcategories in your user-defined fields, you can search all subcategories with one line. For example, if you have House Bills as a category and ten different bills as subcategories, you might want to find all constituents who are 'For' any of the ten bills. Instead of entering a criterion for each bill, you can enter House Bills = 'For'.

Contact Date is the date a user defined field was last changed. For example, you entered Crime as the Most Important Issue for a constituent on 12/7/97. Now, you want to see a list of constituents for whom you had entered crime as the Most Important Issue on that date. To use Contact Date as a criterion, enter it in the Selected Search Criteria immediately following the Most Important Issue line.

To find all constituents who were contacted on a certain date, use the Contact Date as the first line of your criteria.

7. You can save your Selected Search Criteria if you know you will need these same criteria again. To save your search criteria,

   a. Click the Save button (Fig.1 - F). The Save Search Criteria screen (Fig.4) appears.

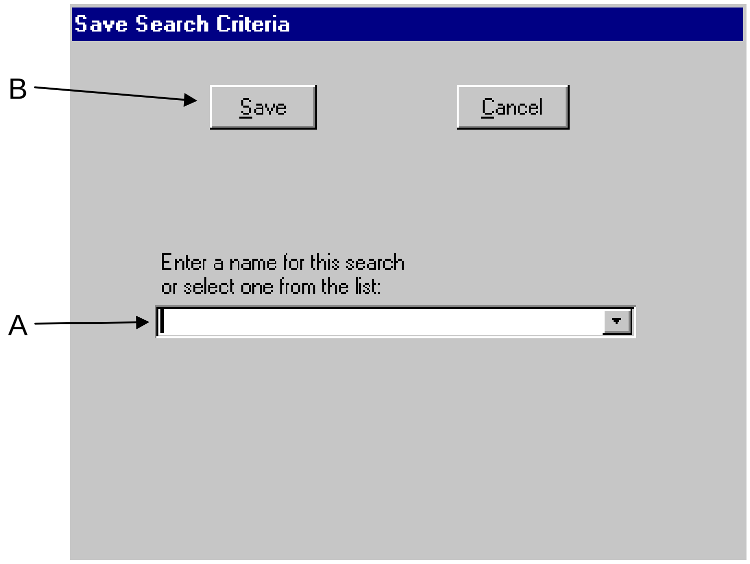


Fig. 4

b. Either enter a new name for the search, or select one from the list to replace an existing search (Fig.4 - A).

c. Click the Save button (Fig.4 - B).

Retrieving previously saved search criteria

1. Click the Retrieve button (Fig.1 - G). The Retrieve Saved Search Criteria screen (Fig.5) appears.

2. Highlight a name in the list (Fig.5 - A).

3. Click the OK button (Fig.5 - B).

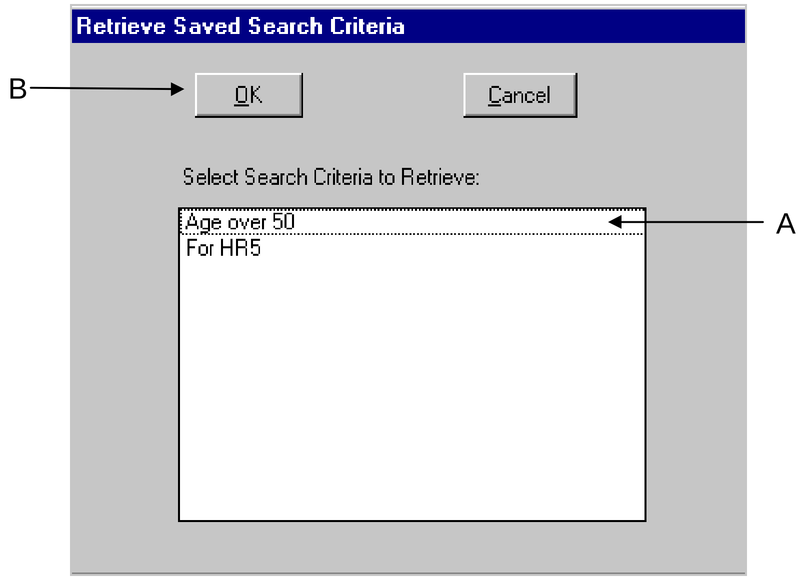


Fig. 5

Note - If you change the search after you retrieve it, the changes will not automatically be saved. You must click the Save button and save it under the old name to replace the old search or a new name to keep the old search in addition to the new one.

APPENDIX 2 -- MAINTENANCE

BACKING UP THE DATABASE

As with all data files, and especially databases, you should make regular backups. If you enter data for eight hours every day, you might want to make backups every day. If you don't change any data for a week, you don't have to make a backup for that period of time.

The only file that needs to be backed up is consdata.mdb in the c:\constit directory. This file contains all of your data and is several megabytes in size. The Constituent Service Software program, itself, is in another file. Since you can always replace this file from your original CD, you don't need to back up this file.

Here are two options for making backups. The better options cost more money, but it is more efficient in the long run.

i. You can buy either an internal or external tape backup. All you have to do is to run the backup program for the unit, and your selected files are backed up on one tape. There are several kinds of tape backup units on the market.

ii. You can get an external drive such as a Zip drive. These are easy to hook up and the disks hold at least 100 megabytes.

ii. You can buy backup software. In this case, your data is stored on diskettes. Since diskettes store a relatively small amount of information, you will have to use several diskettes to back up the file. Windows comes with this type of software.

COMPACTING THE DATABASE

Whenever you delete information from a database, its space in the file is not completely eliminated. So, after a lot of information is deleted, there is a lot of unused space in the database. Therefore, you must regularly compact the database. This will remove this unused space (making the file size smaller) and also make the indexing work more efficiently.

To run a compaction, double-click the appropriate compact icon that is in your Constituent Service Software group. It will first run a repair and then a compaction. The compaction of consform.mdb will take only several seconds. The compaction of consdata.mdb, however, will take several minutes. Different circumstances require different compacting techniques.

- If you use Constituent Service Software only to view data, you don't have to compact consdata.mdb. But, if the consdata.mdb file is growing noticeably in size, or if Constituent Service Software seems to be giving you incorrect information, run the compaction. Under normal use, compact this file every month or two.

- If you frequently run postal reports,or use Search Criteria on Worksheets or Mailing Labels, compact consform.mdb at least twice a month. Under normal use, compact this file once or twice a month.

- If your computer loses power while Constituent Service Software is undergoing critical processing (such as householding), you may get an error that the database is corrupted. In this case, run the compaction on consdata.mdb.

APPENDIX 3 -- USER TIPS

GENERAL TIPS

Searches are not case sensitive. This means, for example, that on the Constituent Search screen you can type in Smith, smith, SMITH or any combination of upper and lower case, and all occurrences of the value will be found.

Constituent Service Software will keep track if you make on a screen. If you do not save your changes before clicking the Done button, you will be asked if you want to close the screen without saving your changes. If you click 'Yes', the screen will close without saving your changes.   If you click 'No', the screen will not close and you can then click Save. You can click 'No' if you decide that your entries are incorrect and you do not want to save them.

You can go to other programs while keeping Constituent Service Software open by using this technique: Hold down the Alt key and press the Tab key. Each time you press Tab, you will see the name of a program that is currently running in Windows. When you see the one you want, release the Alt key.

KEYBOARD TIPS

For people who prefer the keyboard over the mouse, there are several alternatives to the mouse.

Most buttons you see on the screen will have one letter underlined on the button. When you see this, you can do the equivalent of clicking the button by holding down the Alt key and pressing that letter on the keyboard.

Instead of clicking the Done button to leave a screen, you can press the Esc key.

There are drop-down lists or always-open lists on several screens. You can choose an item from a list by Tabbing into the list (or clicking into it) and using your up and down arrows to move to different items in the list. Alternatively, you can type in the first letter of your selection, and the highlight will move to the first matching item in the list. If more than one item matches, you can type the second letter. You do not have to use your mouse; just tab out of the list and the highlighted item will be selected.

To move from field to field, you can either press Tab or Enter.

In fields that have check boxes, you can use the Spacebar to put an X in the box or to remove the X.

APPENDIX 4 -- PRINTING

PRINTING TIPS

You can print reports just by clicking the Print button on a screen. But, there are some settings you might want to change before printing.

Constituent Service Software uses the default printer you have chosen in Windows. But, you may be using a laser printer for some reports and a dot matrix printer for labels. You then need to change your default printer. You change the default printer from Windows Desktop.

1. Go to Start.
2. Select Settings.
3. Select Printers.
4. Click the new printer.
5. Select File from the menu
6. Select Set as Default. (Make sure you also connect the new printer to your computer.)

Alternatively, you can select another printer from the Print Preview screen (see the Print Preview section below).

PRINT PREVIEW

On most screens, you have the option to print or preview a report. The Print option sends your report straight to the printer. The Preview option allows you to display the report on the screen before you actually print it.

When you are on the Print Preview screen, you can zoom in and out of the display by just clicking on the report.

To page through the report, click the arrows at the bottom left of the screen. The left arrow brings up the previous page, while the right arrow brings up the next page. The arrows with the vertical bar brings up the first page (left arrow) or the last page (right arrow). You can go to any page by typing the page number in the Page box at the bottom left of the screen and pressing Enter.

Printing

To print from the Print Preview screen:

1. Click the Print button.

2. Click OK to print the whole report. Or, type in the range of pages in the From and To boxes and click OK.

Changing the Printer

To change the printer from the Print Preview screen:

1. Click the Print button.

2. Click the Setup button.

3. Select a different printer from the drop-down list under Specific Printer.

4. Click OK.

APPENDIX 5 -- FIELDS

The following is a list of fields in Constituent Service Software which can be used for searches with Mailing Labels, Worksheets, Form Letters, etc.

Field Name	Field Type	Description
Address	Text	The full address including house number, street name and unit number.
Age	Number	The age of the constituent on the date of the next election.
AgeRange	Text	The age range of the constituent (A=18-29; B=30-49; C=50-64; D=65 and over).
Birthdate	Date	The constituent's birth date.
CarrierRoute	Text	The postal carrier route in which the constituent lives. The format is either the letters C or R followed by three digits.
CongDist	Text	The number of the federal Congressional district in which the constituent resides. The number will be between 1 and 20.
County	Text	The county in which the constituent lives.
Ethnicity	Text	The ethnicity of the constituent based on Last Name.
HouseCount	Number	The number of registered voters in the family.
HouseNumber	Number	The number in the constituent's street address. For example, in the address 1005 Washington St., this field would read 1005.
Keep	Yes/No	If marked Yes, the record will not be deleted during an update even if the new data does not include this constituent.
Last Name	Text	The constituent's last name.
LegDist	Text	The state Senatorial District in which the constituent resides.
Letter	Yes/No	Tag constituents to send them form letters.
OddEven	Text	This indicates whether HouseNumber in the street address of the constituents home is an odd or even number. The letter **O** represents Odd and the letter **E** represents Even.
Phone	Text	The constituent's telephone number.
RepDist	Text	The number of the State Representative district in which the constituent lives.
Senior	Yes/No	Indicates if the constituent is 55 years old or older.
Sex	Text	The constituent's sex. **M** stands for Male and **F** stands for Female. **S** stands for unknown sex.
StreetName	Text	The name of the street on which the constituent resides.
Ward	Text	The ward in which the constituent lives.
Zip	Text	The constituent’s zip code, either a five or nine digit number.