

Getting Started *with the* PressFile

Use this guide side by side with the PressFile for a quick introduction.

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The PressFile manages your contact lists, helps you create new lists, and helps you reach your contacts—one at a time or all at once, via email, letter, fax or telephone.

2. Contacting People page 8

The PressFile manages your contact lists, helps you create new lists, and helps you reach your contacts—one at a time or all at once, via email, letter, fax or telephone.

3. WebLinks page 11

The PressFile also helps you conduct research on a contact, by quickly locating pertinent web-based information and by using web services to validate email addresses and clean U.S. postal addresses.

4. Shared History page 12

If you choose, the PressFile will automatically record the history of your contacts via email, phone and letter. You can share this history with your colleagues, so that your entire workgroup can be kept up to date on your company's contact history with an individual.

5. On Target page 13

The PressFile will help you form new lists quickly and precisely, so that your communications can be efficiently and carefully targeted. You can make your lists available to your entire workgroup as well. And you can take your list with you, by syncing it with your Palm™ or PocketPC™.

6. Timely Connections page 16

The PressFile connects with calendar applications such as Microsoft Outlook™, Entourage™ and iCal™. You can create a new calendar event or reminder in these popular calendar applications, directly from the PressFile.

7. Housekeeping page 17

Any database that contains thousands of names must be maintained. The PressFile makes housekeeping easy through quick access to a Possible Dupes menu, as well as instant reports on records with missing emails, incomplete addresses or no contact history.

Using this guide

Your PressFile may require logging in. If so, please do so. This guide begins with the PressFile's main window, which is the first window you see when you begin using the PressFile, right after you have logged in.

Your version of the PressFile may have customizations that cause the windows to vary in appearance slightly from the descriptions included here. However, the three columns of the main window will still work in the same fashion.

A note on responsiveness: the speed of a multi-user database

Your entries in the PressFile are immediately made available to as many as a few hundred of your colleagues over the network. At times, you may find that the PressFile takes a few seconds to redraw the screen. If you believe that the PressFile is responding too slowly, contact your network administrator.

1. Meet the PressFile

A short introduction to the PressFile's main window

Orgs & Lists

Both Organizations and Lists are groups of people in the PressFile. Lists are groups that you can create for a specific purpose, and Organizations are by their very nature groups of people. The PressFile gives you quick access to both.

Click **Orgs** at the top of the left column, then click **Lists**. You will see the column below changes to show the type of group you've selected.

Organizations

Click **Orgs** at the top of the left column. Then select one of the organizations in the column. The members of that organization show to the right.

The screenshot shows the PressFile interface with the 'Orgs' tab selected. The left pane displays a list of organizations with their counts. The 'BOSTON GLOBE' organization is selected, showing 15 members. The right pane displays the details for Peter N. Stearns, including his title (Editor), email (PStearns@test.com), phone (555-1212), and address (4400 University Dr., Ms 3a2, Fairfax, VA 22030-4444).

Name	Count
123	1
456	1
60 MINUTES	2
AMAZON.COM	5
AMERICAN HERITAGE	1
AMERICAN PROSPECT	2
ARTFORUM	2
BOSTON GLOBE	15
BOSTON MAGAZINE	2
CBS SUNDAY MORNING	2
CHARLIE ROSE SHOW	2
CHICAGO TRIBUNE	5
CHILD	2
CHRONICLE OF HIGHER EDUCATION	6
CNN	2
COMMONWEAL	2
CRITICAL REVIEW	1
DALLAS MORNING NEWS	2
DATELINE NBC	2
DEPT OF HISTORY	2
DETROIT NEWS	2
DISCOVER	3
ENTERTAINMENT WEEKLY	2
FEED MAGAZINE	2

Name	Count
Alex Beam	1
Charles Boer	1
Nils Bruzelius	1
Christine Chinlund	1
Jan Freeman	1
Ellen Goodman	1
Lynda Gorov	1
Sheryl Julian	1
Michael Kenney	1
Dolores Kong	1
Bruce McCabe	1
Eileen McNamara	1
David Nyhan	1
Diego Ribadeneira	1
Kate Zemicke	1

Peter N. Stearns (2)

full name Peter N. Stearns (2)
title Editor
email PStearns@test.com
phone 555-1212
phone 555-1212
fax 555-1212
greeting Peter

Address 1 2 List notes: Appleby - Review ...

organization JOURNAL OF SOCIAL
office George Mason University
street 4400 University Dr., Ms 3a2
city ST zip Fairfax VA 22030-4444
country

medium Print
frequency
distribution
Patron
Type Org | Colleagues (0)

web
WebLinks
notes

Click **Org Info** at the top of the center column. The address of the organization shows in the **Org Info** panel, along with other details about this organization. Click **People** at the top of the center column to return to the members of the organization.

The screenshot shows the PressFile interface with the 'Org Info' panel selected. The interface includes a top navigation bar with 'Orgs', 'Lists', 'Org Info', 'People', 'Details', 'Keywords', and 'History'. A search bar is present above the 'Orgs' and 'Lists' tabs. The main content area is divided into two columns. The left column displays a list of organizations with checkboxes and a 'Count' column. The right column displays detailed information for the selected organization, 'BOSTON GLOBE'.

All 78 shown	Count
<input type="checkbox"/> 123	1
<input type="checkbox"/> 456	
<input type="checkbox"/> 60 MINUTES	2
<input type="checkbox"/> AMAZON.COM	5
<input type="checkbox"/> AMERICAN HERITAGE	1
<input type="checkbox"/> AMERICAN PROSPECT	2
<input type="checkbox"/> ARTFORUM	2
<input type="checkbox"/> BOSTON GLOBE	15
<input type="checkbox"/> BOSTON MAGAZINE	2
<input type="checkbox"/> CBS SUNDAY MORNING	2
<input type="checkbox"/> CHARLIE ROSE SHOW	2
<input type="checkbox"/> CHICAGO TRIBUNE	5
<input type="checkbox"/> CHILD	2
<input type="checkbox"/> CHRONICLE OF HIGHER EDUCATION	6
<input type="checkbox"/> CNN	2
<input type="checkbox"/> COMMONWEAL	2
<input type="checkbox"/> CRITICAL REVIEW	1
<input type="checkbox"/> DALLAS MORNING NEWS	2
<input type="checkbox"/> DATELINE NBC	2
<input type="checkbox"/> DEPT OF HISTORY	2
<input type="checkbox"/> DETROIT NEWS	2
<input type="checkbox"/> DISCOVER	3
<input type="checkbox"/> ENTERTAINMENT WEEKLY	2
<input type="checkbox"/> FEED MAGAZINE	2

BOSTON GLOBE details:

- by: Colleen Lanick
- created on: 5/30/2000
- for: Colleen Lanick
- Address: [Empty field]
- organization: **BOSTON GLOBE**
- office: [Empty field]
- street: 135 Morrissey Blvd
- city ST zip: Boston MA 02107
- country: [Empty field]
- medium: [Empty field]
- frequency: [Empty field]
- distribution: Patron
- Type: [Empty field]
- main phone: (456) 789-4561 x24
- main fax: (123) 456-7894 x5
- circulation: [Empty field]
- demographics: [Empty field]
- notes: [Empty field]

Categories:

- Top Tier Media
- Technology
- Arts & Culture
- Politics
- Conklin Campaign
- Other...

Extra: Select an organization, then shift-click to select a second or third organization. The members of all the selected organizations show to the right.

Click **+** to add a new organization to the PressFile. You may duplicate an existing entry, or start with a blank entry.

Lists

Click **Lists** at the top of the left column. Then select one of the lists in the column. The members of that list show to the right.

The screenshot shows the PressFile software interface. The 'Lists' tab is selected in the top left. A list of 25 members is displayed in the center column. The 'Details' tab is selected in the top right, showing information for Peter N. Stearns, including his full name, title (Editor), email (PStearns@test.com), phone (555-1212), fax (555-1212), greeting (Peter), and address (George Mason University, 4400 University Dr., Ms 3a2, Fairfax, VA 22030-4444).

Click **List Info** at the top of the center column. Details of this list are shown in the **List Info** panel. Click **People** at the top of the center column to return to the members of the list.

The screenshot shows the PressFile software interface with the 'List Info' panel selected. The panel displays details for the 'Ad Hoc List', including the name, creator (Tio), creation date (3/13/2003), and a notes field. The 'People' tab is selected in the top right, showing a list of 25 members.

Extra: Select any list, other than the 'ALL PEOPLE' list, then shift-click to select a second or third list. The members of all the lists show to the right.

Click **+** to add a new list to the PressFile. You may duplicate an existing list, start with a blank list, or create a dynamic list whose membership matches a list filter. (See the heading on *Filtering Columns*, below, for more information.)

People

If it is not already selected, click **People** at the top of the center column. Then select one of the people in the column. Details on this person show to the right.

The screenshot shows the PressFile interface with the 'People' column selected. The 'Details' panel for Erica Ainsbury is visible on the right. The 'Details' panel includes the following information:

- full name: Erica Ainsbury
- title: EDITOR
- email: EAinsbury@test.com
- phone: 555-1212
- fax: 555-1212
- greeting: Erica
- Address 1: 2 List notes: Ad Hoc List
- organization: ASCAP NEWS
- office: DEPT OF PSYCHIATRY &
- street: University Of Texas Medical
- city ST zip: Galveston TX 77555-0428
- country:
- medium:
- frequency:
- distribution:
- Patron Type:
- Org | Colleagues (0)
- web: nyt.com
- WebLinks:
- notes:

Extra: The **People** column has a back button and a forward button. Click the arrows above the checkboxes in the center column to step backward and forward through the various **People** you have viewed today.

Click the three choices at the top of the right column: **Details**, **Keywords & History**. Note that each panel contains a set of information about the selected person.

On the **History** panel, select the tabs labeled 'Contacts' & 'List Membership'. The 'Contacts' tab shows contacts with the selected person, while the 'List Membership' tab shows selected lists.

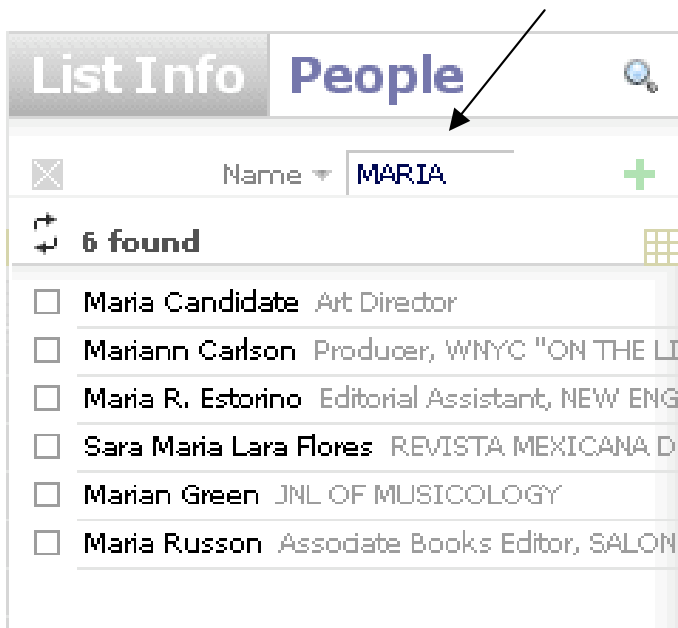
The screenshot shows the 'History' panel for Leon Wieseltier. The 'Contacts' tab is selected. The 'List Membership' tab is also visible. The 'Contacts' tab shows a table with the following information:

date	project
5/20/03	project 1
type	creator
	Albert

Click **+** to add a new person to the PressFile. You may duplicate an existing entry, or start with a blank entry.

Filtering Columns

The columns in the PressFile can be filtered, using the filter box at the top of each column. Choose a filter type, such as 'Name', and enter characters to narrow the column to only those items that match those characters. For instance, enter "MA" to find names that begin with those letters, such as Matheson or Maria.



Extra: you can find people by their initials by entering the initials separated by a space. To find John Smith or Janet Samuels, you could enter "J S". Wildcard searches are also possible, using the "" (asterisk): enter "J*SON" to find Jason, Jackson or Johnson.*

2. Contacting People

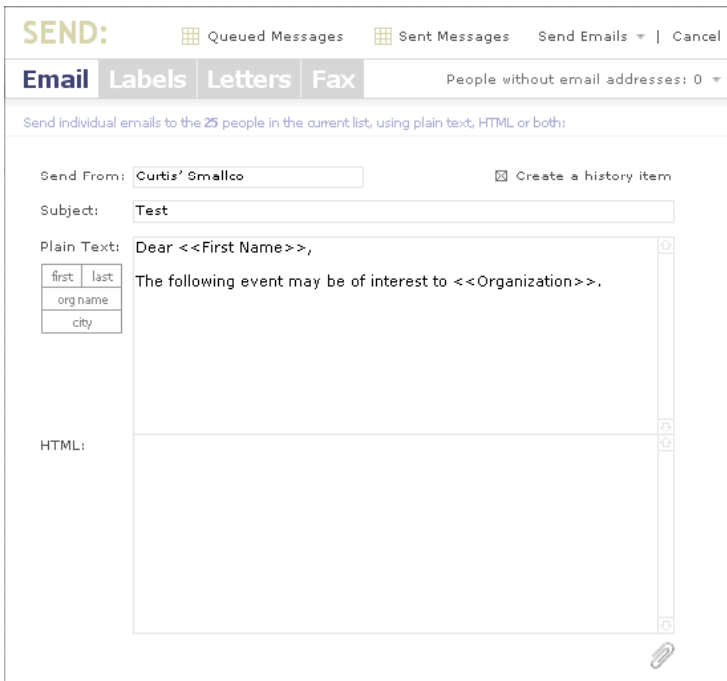
Get in touch, one by one or a whole list at once.

Top Row Buttons

The top row of the PressFile's main window provides a number of different ways to contact people.

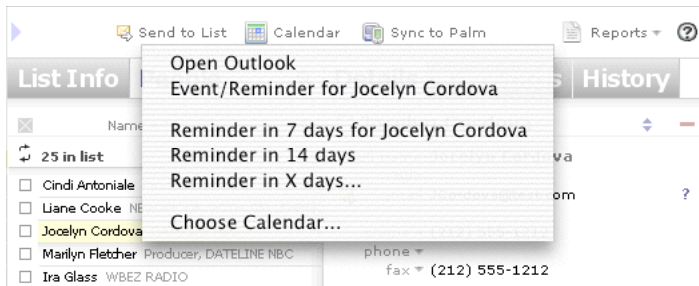


Click 'Send to List' to show your options for reaching all the **People** currently in the center column. You can send email, print labels or letters, or with additional software, you can fax to a group.



Select each of the panels, **Email, Labels, Letters & Fax**, to view the options available for that panel. Every panel offers the option of creating a history item for every person contacted, by clicking the checkbox labeled 'Create a history item'.

Click 'Calendar' to create an event, reminder or appointment for the selected person. This menu of choices creates an entry in your calendar: Microsoft Outlook on Windows, and Entourage or iCal on the MacOS. (Other calendar applications may be supported by custom scripting. Please contact your administrator for more information.)



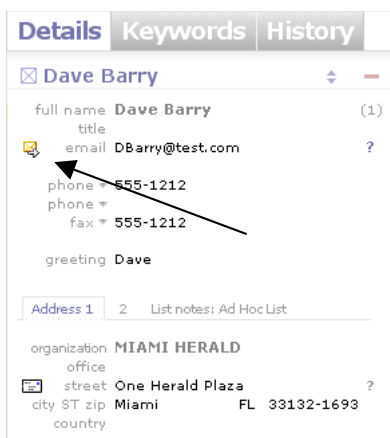
Click 'Palm Sync' to send info on your current **People** to your Palm™ or PocketPC™.

Click 'Reports' and select 'Report Templates' to view your current **People** in a Microsoft Word document. These documents may be form letters, label templates or custom reports. Save a copy of one of the templates supplied with the PressFile, and customize it to your needs. Then save it to the same PressFile templates folder, so it may be quickly accessed from the 'Reports' menu.

The PressFile report templates are stored in your computer's main Documents folder.

Reaching the Selected Person via email

Select a person in the center column, and click the **Details** pane. If there is no email address in the email field, enter one. Then click the email icon, to the left of the email address. The PressFile will address a new email message to the selected person in your default email software. (If no message is created, check your computer's default email settings, or contact your administrator.)



The PressFile will ask if you wish to create a history item for this email. If you say 'Yes' a new contact item will be created for this person.

Beginning a Letter to the Selected Person

If there is no street address, enter one. Then click the letter icon, to the left of the street address. This opens the PressFile templates folder, which contains a PressFile letterhead template and may also contain templates customized for your needs. Open a template of your choosing, and it will be merged with data for the selected person. *(If no templates folder is found, or if it is empty, contact your administrator.)*

Details	Keywords	History
☒ Dave Barry		
full name	Dave Barry	(1)
title		
email	DBarry@test.com	?
phone	555-1212	
phone	555-1212	
fax	555-1212	
greeting	Dave	
Address 1 2 List notes: Ad Hoc List		
organization	MIAMI HERALD	
office		
street	One Herald Plaza	?
city ST zip	Miami FL 33132-1693	
country		

The PressFile will ask if you wish to create a history item for this letter. If you say 'Yes' a new contact item will be created for this person.

Dialing the Selected Person's phone number

Whether you are on the **Details**, **Keywords** or **History** pane, you can click the selected person's name to quickly send an email or dial their phone number. Phone dialing can be configured to dial through your phone system, or through your Bluetooth-enabled mobile phone. *(Phone dialing must be enabled for your installation of the PressFile. Contact your administrator for more information.)*

3. WebLinks

Use resources on the web to help you work with contacts

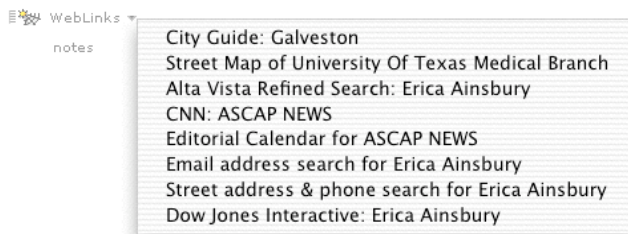
Validate emails, Clean U.S. postal addresses

As part of a PressFile support agreement, you may have the PressFile check whether email addresses are valid, and format U.S. postal addresses to the standards of the United States Postal Service. This service may also be available for other regions of the world.

These web services are accessed via buttons to the right of the email address and street address fields, found on the selected person's **Details** pane. Click the web service icon to engage the service.

Link to web-based content for a person

From the bottom of the selected person's **Details** pane, click 'WebLinks'. Select an item to show web content for this person in your default browser. *(If your browser does not open, confirm your default internet settings.)*



4. Shared History

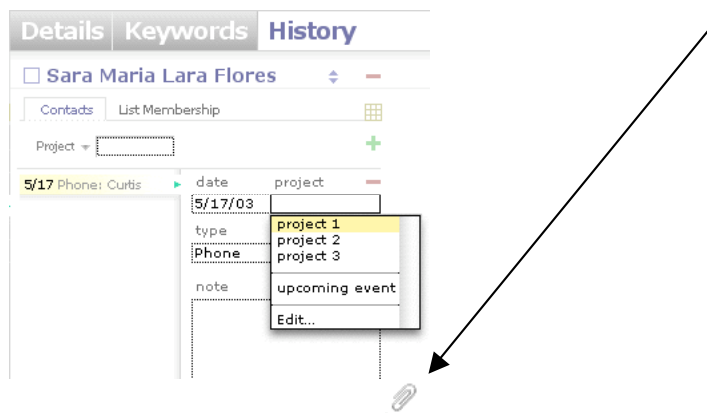
Find out who did what with whom, and log your own contacts

Logging Contacts

The PressFile will automatically log your emails, calls and letters if you wish. You can also enter these contacts if they happen away from your desk.

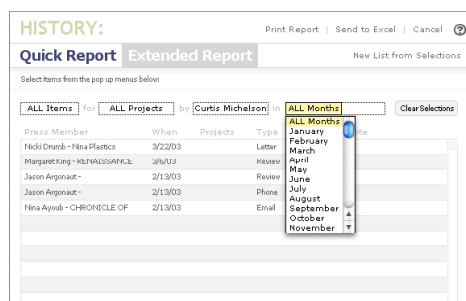
Click **History** and select the 'Contacts' tab. Click **+** to add a new history item. You may select a project for this item, as well as a contact type. For instance, if you placed a phone call for the Acme Corporation, you might choose 'Acme' as the project and select 'phone' as the type of contact.

Link a document to this history item by clicking the paperclip icon at the bottom of the 'Contacts' tab. To ensure that your colleagues can reach the document, link only to documents on shared network volumes.



Quick Reports

In the top row buttons, click 'Reports' and select 'Quick Report'. From this reports window, you may select a group of history items, for instance, all contacts for 'project 1' in April, and print a report. You may also create an Excel spreadsheet, or make a new list with the contact names. For more complex reporting needs, click **Extended Report**.



5. On Target

Focus your lists precisely.

Finding People

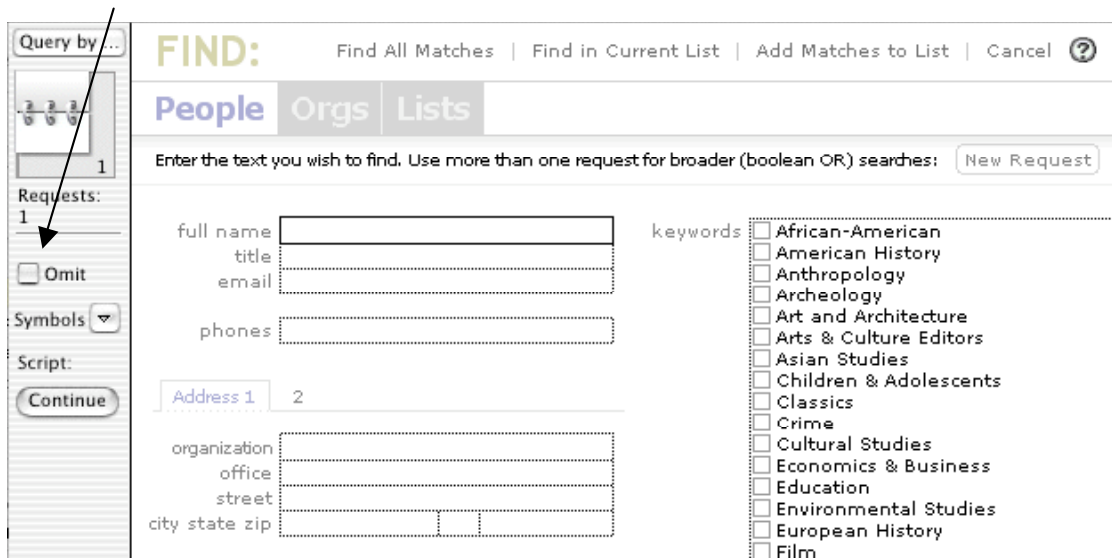
Click the magnifying glass icon to find **People, Lists or Orgs.**



Enter your search criteria, then click one of the three query options:

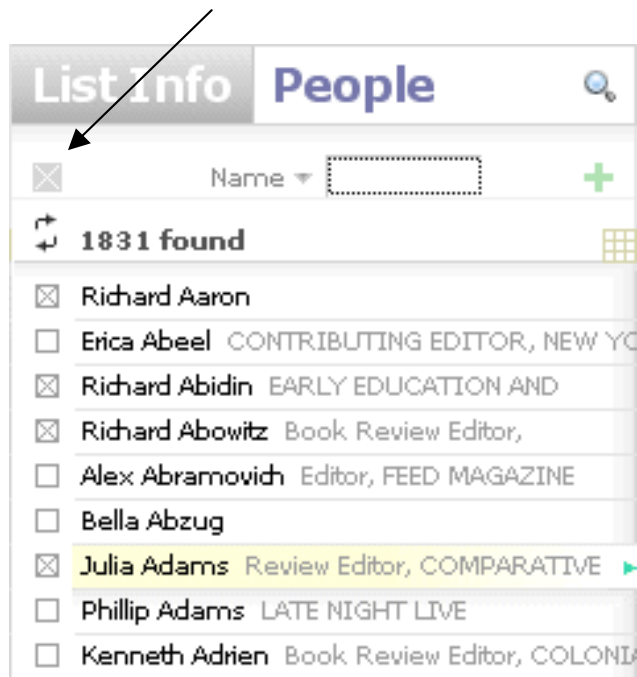
- Find All Matches—queries across all entries
- Find in Current List—queries only the items already in the column
- Add Matches to List—finds items that are not already in the column.

You may also choose to omit items that match your query, by clicking the 'Omit' checkbox at the left. For more on finding records, consult your FileMaker Pro manual.



Marking Records

Click the checkbox to the left of a person, list or organization to mark it. Once you have marked your records, you may show or omit only the marked records. Click the Show-Omit icon directly above the column's checkboxes, and select an option from the menu.



Making New Lists

You can make new lists in any of the following ways:

- Find people by clicking the magnifying glass icon
- Mark a set of people and then recall them from the Show-Omit menu
- Combine a set of existing lists
- Find contacts in the Quick Report window, then click 'New List From Selections' at the upper right.

When the names you want are showing, click **+** to add a new list to the PressFile. You may also duplicate an existing list, start with a blank list, or create a dynamic list whose membership matches a list filter.

Updating Lists

There are a few ways to update a list. Try these approaches with sample lists:

1. Select a list, then mark a few people for omission, by clicking the checkbox to the left of their names.
2. From the Show-Omit menu, select 'Omit Marked People'.
3. Click **+** and select 'Update <list name> with Current People', or click 'Update List?' at the top of the column.

If you would like to update a list that is not selected:

1. Assemble the desired names in the **People** column, by finding or marking records.
2. Ctrl-click on the list you would like to update.
3. From the menu, select 'Update <list name> with Current People'.

To add or remove people from a list one at a time:

1. Select the person you would like to remove or add to a list.
2. Click the **History** pane, and select the List Membership tab.
3. Find the list by using the filter box at the top of the column. You may need to uncheck the checkbox labeled 'only lists with <person's name>'.
4. Check the grey box to the right of the list.

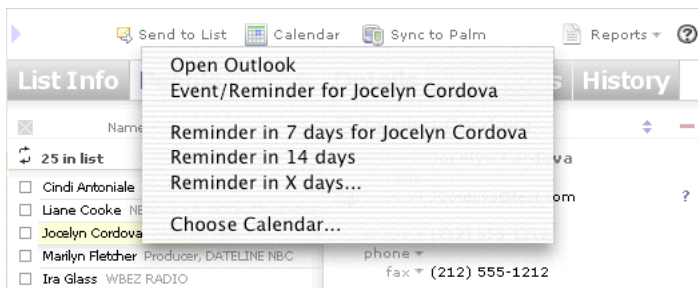
The screenshot shows the 'History' pane for 'Julia Adams'. The 'List Membership' tab is active. A filter box at the top of the list is set to 'APPLEBY'. The list contains three entries: 'Appleby - Inheriting the Revolution', 'Appleby - Review Copy', and 'Appleby - Tour'. The first two entries have a green checkmark in a grey box to their right, and an arrow points to this box. The third entry has a grey box with a grid icon. The 'only lists with Julia Adams' checkbox is unchecked.

6. Timely Connections

Link your PressFile contacts to your calendar, your Palm and the web

Calendar Events

In the top row buttons, click 'Calendar'. If your calendar program is not mentioned in the first menu item, select 'Choose Calendar...'. The PressFile opens any calendar application for which you can supply a file path, and can create appointments in Microsoft Outlook™, Entourage™ and iCal™.



Palm Sync

Click the 'Sync to Palm' button to take the current **People** column with you on your Palm™ or PocketPC™.

Web Content

Click the **Details** pane, and select the 'Weblinks' menu, below the street address. The menu items will bring you directly to web content pertaining to the selected person.

If you have subscribed to the PressFile's Web Services, you can validate email addresses automatically, without having to send emails and wait for them to bounce. You can also format United States postal addresses to the standards of the U.S. Postal Service, including the automatic addition of zip + 4 extensions.

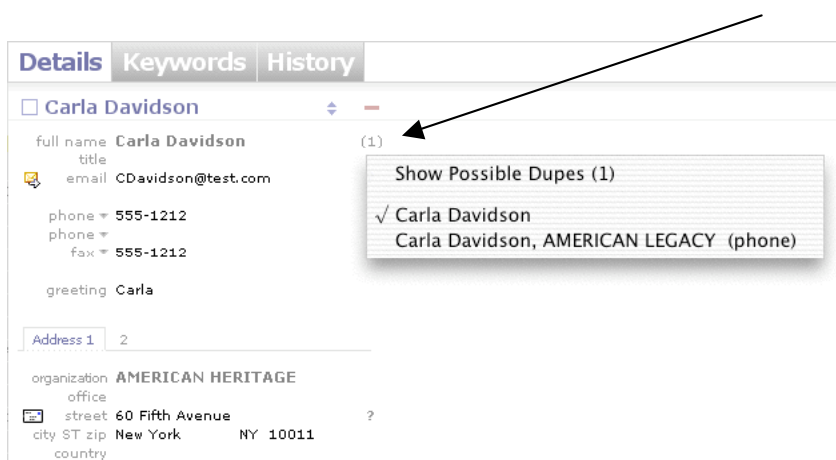
7. Housekeeping

Keep your data up to date by checking for duplicates and incomplete records

Possible Dupes

Duplicate records are a fact of life in large databases. Many times, the duplicate records will have similar but not identical names. The PressFile helps you find records that have similar names as well as similarities in other fields such as phone numbers or postal codes.

When you select a name that is a possible duplicate, you will see a number in parentheses to the right of the name field on the **Details** pane. Click the number to show the Possible Dupes menu.



Select one of the names listed in the menu to show that record. The record you are viewing will have a checkmark.

If you decide to delete a record with possible dupes, you may wish to reassign the history items that belong to the record you're removing. To reassign all the history items for a possible dupe, click the **—** to the right of the person's name and select 'Reassign history items to...'. Select the record you would like to receive the history items from the submenu.

To reassign a single history item for a possible dupe, click **History** and select the 'Contacts' tab. Select the history item you would like to move, and click the **—** at the right edge of the 'Contacts' tab. Select 'Reassign this item to...' and select the record you would like to receive the history item from the submenu.

You can also find all the possible dupes in a list. Select the list, then select the 'Show-Omit' menu (the grey checkbox at the top left in the **People** column). Select 'Possible Dupes', then select 'Show', 'Omit' or 'Mark' from the submenu.

Records missing addresses or contact history

Select the list you wish to check, then select the 'Show-Omit' menu (the grey checkbox at the top left in the **People** column). In addition to 'Possible Dupes', you can check for:

- Bad or Missing Emails—fields that are empty or invalid
- Incomplete Addresses—missing a postal code, for instance
- People with No History—records that have no recorded contact items

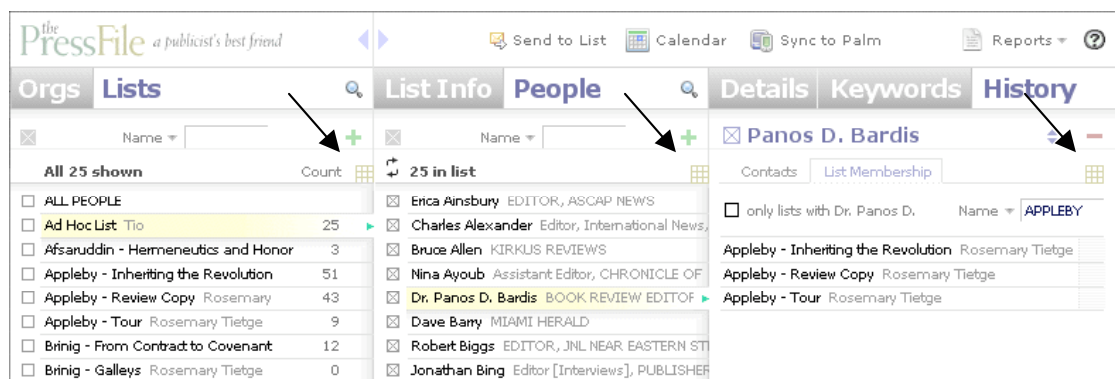
Select one of these items, then select 'Show', 'Omit' or 'Mark' from the submenu.

Advanced Features

Table views, FileMaker features

Table Views

Every PressFile column offers quick access to a table view. Look for the 'Table Grid' icon at the upper right corner of each column.



Click the 'Table Grid' icon to display a new window containing a scrolling list of the contents of the column.

This table view is a full-featured FileMaker window, where you can:

- Click the column headings to sort by that column
- Resize or reorder the columns by clicking and dragging
- Perform finds
- Replace the contents of a field across all found records.

To learn more about these features, consult the FileMaker Pro manual.

FileMaker Features

This version of the PressFile uses FileMaker Pro as its database engine. FileMaker offers additional features to PressFile users, such as:

- Web publishing via XML
- SQL integration
- Customized interfaces

The PressFile's FileMaker foundation offers the ability to customize virtually any aspect of the software. For more information, consult the FileMaker Pro manual, or call your PressFile support staff.

PressFile Support

Get more out of the PressFile through fee-based support

Support Options

The PressFile's quarterly service options include web services, phone support and screensharing over the web. Support is also available on an hourly basis. For more information, visit

pressfile.com/support

or call:

U.S.: 8-PressFile (toll-free, 877-377-3453)

International: +305-273-6096

or write:

help@pressfile.com