

## Conventions for Entering Contact Information

Applies to:  Outlook 2000  Outlook 2002  Outlook 2003  RetailManager  Excel  
 Access

### Background:

We have used Outlook as the basis in the example for correctly structuring and entering contact information into a database, but the conventions also apply to a RetailManager, Excel, Access, or any other customer database.

If working from an Existing database, we recommend exporting first to Excel, and cleaning up the database in Excel. This is far easier to do in Excel.

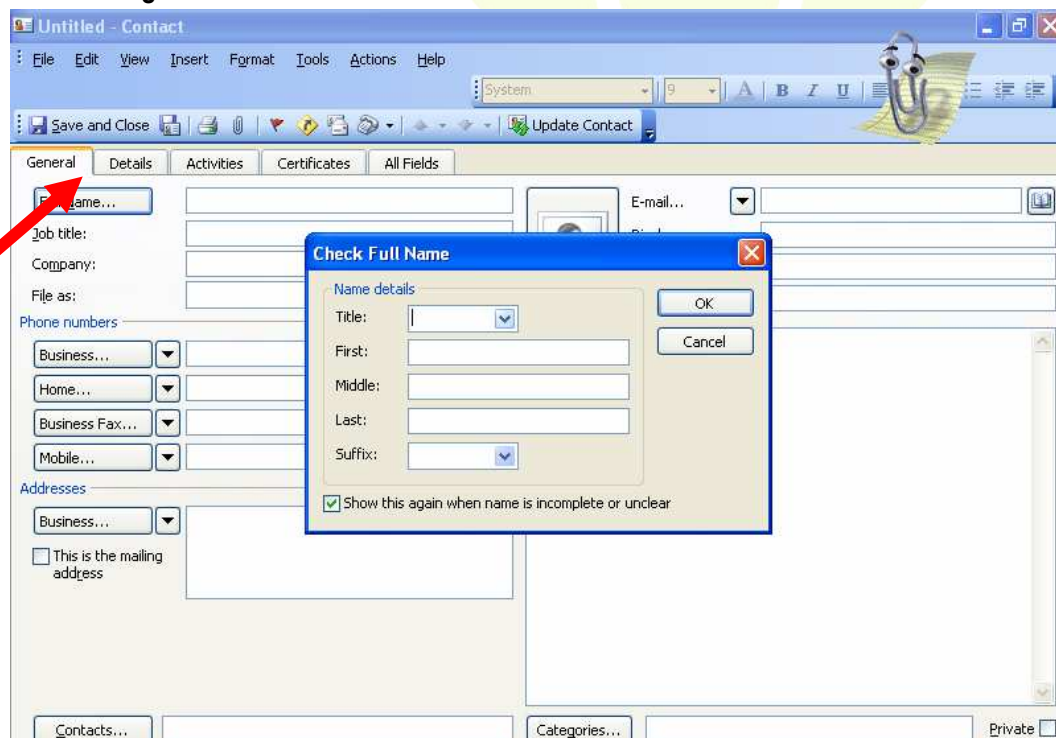
### Outlook:

As the Outlook Contacts folder is essentially a database made up of fields, it is essential that we use both the right fields to enter the relevant information, and that we are consistent in the way in which we enter that information. For example, we may want to contact only those Contacts who live in South Australia. But unless we enter in all those contacts using a consistent format, we will not be able to find them easily. We follow Australia Post addressing conventions – all states should be entered as abbreviations only – IE SA, NSW etc – no full stops. All suburbs should be entered in CAPS (You can easily change this in Excel using the **UPPER** function. These conventions ensure consistency).

### Contact Name:

Although the **Full Name** field appears to be only one field, it is actually a combination of fields. Always click on the Full Name field to enter the data to ensure we have the first and last names entered in the right fields.

#### 1. Entering Husband and Wife details:



## TRAINING NOTES

If you communicate jointly with both husband and wife, it is best to enter **John & Mary** in the first name field, and their surname in the Last Name field. In this way, your merged letters, when selecting the **First Name** field in the merge, will be addressed Dear **John and Mary** (If you need to communicate with both separately, create a new contact record for each).

### 2. Entering partner details when different surnames:

John Smith and Mary Jones are a couple. Enter **John and Mary** in the first name field, and then **Smith/Jones** in the last name field.

### 3. Entering 'Mr J Smith' and other derivations with Titles and no first name:

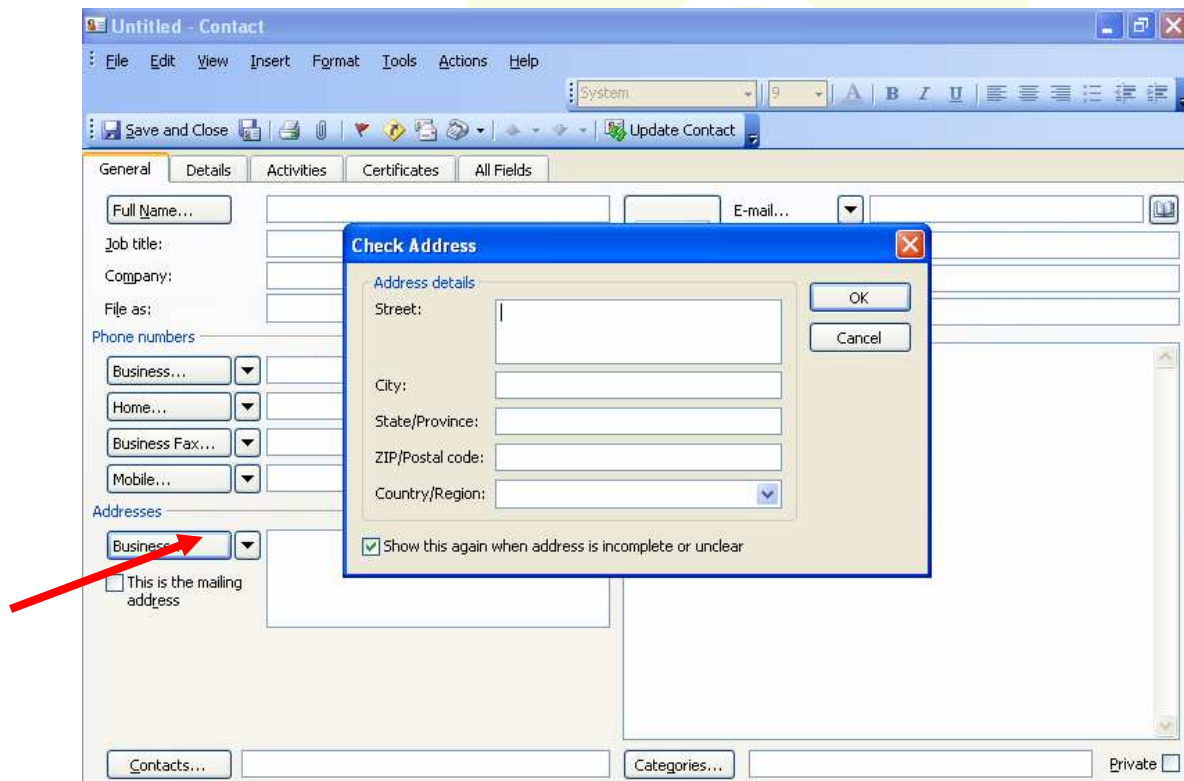
If we enter **Mr J** in the first name field, then our merged letters and emails will be addressed **Dear Mr J**. Enter **Mr Smith** in the first name field, and nothing in the last name field.

### 4. Entering Titles:

Titles are very rarely used these days in addressing letters. Even on the front of the envelope, we will use **John and Mary Smith**, not Mr and Mrs. The only exceptions may be **Dr** and **Professor**. In this case, enter **Dr John** or **Professor John** in the first name field. If a contact has told you that they are a Dr or Prof when you have asked for their name, they will generally want that to be acknowledged!

### Entering Address Information:

As with the full name field, the **Business Address** field is a summary of a number of fields. Always click on the **Business Address** field to enter in address details, as per the figure below.



The screenshot shows the 'Untitled - Contact' window with a 'Check Address' dialog box open. The dialog box contains the following fields:

- Street: [Text input field]
- City: [Text input field]
- State/Province: [Text input field]
- ZIP/Postal code: [Text input field]
- Country/Region: [Dropdown menu]

There are 'OK' and 'Cancel' buttons in the top right of the dialog box. A checkbox at the bottom of the dialog is checked and labeled 'Show this again when address is incomplete or unclear'. In the background, the 'Business Address' dropdown menu in the 'Addresses' section of the contact form is highlighted with a red arrow.



## TRAINING NOTES

1. Enter the street address all on **line 1**.
2. Always enter the **STATE** as per Australia Post's desired formatting – in Abbreviation with no full stops. Use SA, VIC, NSW, QLD, NT, TAS, WA and ACT **always** to maintain consistency (See the training notes for **Aus Post Addressing Guidelines**). And remember, if you don't have the State entered in a separate field, it will be difficult – if not impossible, to find everyone who lives in your state, if you are planning an event, or in another state, or if you are having preview/product launches, so that you can invite your clients, or let them know of new distributors in their state.
3. Always enter the **SUBURB** in Upper case.
4. If the contact lives in Australia, and the majority of your contacts are Australian based – enter nothing in the Country field (Saves time – one less entry) – when you want to filter on contacts to select just those in Australia, then we set the conditions for the Country field to “is empty”.
5. If the contact does not live in Australia, select the country from the drop down list.

### Three types of Addresses:

There are 3 types of addresses you can enter for an Outlook Contact – Business, Home and Other. However, most companies will only require one address – the main mailing address. As the Business Address is the one displayed when you open the Contact form, use this address even if it is a home address – it is simply where you want mail to go to. Then in mail merges, we always use the Business Address fields – makes life easier! 😊



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