

Quick start guide

Create contacts

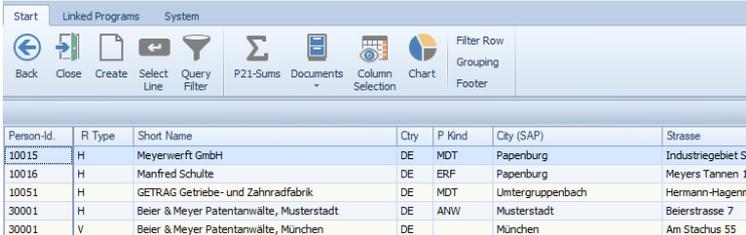
1. Open the person management via the main menu or start from another data management.
2. A search filter for "contact-search" is displayed. To create new contacts click the "Create" button or press the F5 function key.

3. If the option "Re-Input check" in the so-called company settings (basic settings) is disabled, (Purpose: avoid creating redundant contacts) , PatOrg continues with step 7. However, if the option is enabled, a window for re-entry control is displayed. The search word should be a part of the name of the new person.



4. When clicking the "Next" button PatOrg is checking whether there are already person records, which contain the search word in the fields short name, person name or address.

5. If the search term was not found, PatOrg will continue with Step 7. However, if the search term was found a list of persons containing the search word is shown. Now you need to check if the new contact is already on the list and therefore no new record needs to be created. If necessary, a person record can be opened for a detailed view by double-clicking on the appropriate line or by selecting a line and pressing the "Enter" key or button. By pressing the Escape key or button you can jump back to the list.



Person-Id.	R Type	Short Name	Ctry	P Kind	City (SAP)	Strasse
10015	H	Meyerwert GmbH	DE	MDT	Papenburg	Industriegebiet S
10016	H	Manfred Schulte	DE	ERF	Papenburg	Meyers Tannen 1
10051	H	GETRAG Getriebe- und Zahnradfabrik	DE	MDT	Umlergruppenbach	Hermann-Hagenr
30001	H	Beier & Meyer Patentanwälte, Musterstadt	DE	ANW	Musterstadt	Beierstrasse 7
30001	V	Beier & Meyer Patentanwälte, München	DE		München	Am Stachus 55

6. By pressing again the "Create" button, PatOrg continues the creation of person records.
7. A window for selecting a person mask is displayed. The right person type to determine the mask layout can be selected by double-clicking or by means of selecting a line and pressing the Enter button or key.

8. Then a blank contact record with fields corresponding to the selected mask is displayed and is ready for data entry.

9. Save person record via clicking on the "Save" button or pressing the F12-key.

The newly created person can now be used in many ways in the program. Typically, contacts are added to cases and marked with special features (e.g. client, inventor) Furthermore, the new contact can be used for form letter-processing.

In the following, only the most important fields in a person record are explained. For more information about data fields, see the context help system of PatOrg that can be opened at any time via the "?" button on the top right corner.



P01 Basic data

Type of record H V A

The letter above the person ID. designates the record type. It specifies whether it is current record a principal character (H), a contact within a company (A) or an address variant (V).

Person-Id.

The person ID is automatically assigned by PatOrg when you first save a person (4- to 6-digit number).

Short name

For legal entities, the name of the company / organization is entered or alternatively an abbreviation. For individuals, a uniform syntax of the short name, such as "last name, first name" or "last name first name" is recommended.

P02 Address

Language

The selected language controls letter generation and issuing of invoices.

Address layout

Address additives and special formatting is enabled on this field especially in the case of natural persons and contacts which will be used when generating letters. For example, in correspondence to individuals typically the letter will be addressed as "Ms." or "Mr." which should be written before the name of the contact. When using the "Show address layout" button adjacent to the address layout field the current address layout rule will be applied and displayed in a separate window. In this way the address layout can be checked.

Person name

In this field, enter the full company name for legal persons and for individual persons the name with title and first name.

Home address and PO Box address

For storage house and mailbox address is one text field available.

Salutation

The salutation of- the current person is entering it exactly as it should also be done on the issue of letter mail in this field.

Greeting

Depending on the input speech greeting predefined formulas are provided.

For further questions, please contact our support team by phone +49 (0) 4962 9119-0.