

MEMOS Database

JOBZ! users who take advantage of the MEMOS module know that it is a powerful and easy-to-use communications tool.



MEMOS is a correspondence database that is capable of producing a wide range of formats, from quick memos and formal business letters to project schedules and letters of transmittal.

Documents are branded with your letterhead and include your personal signature. Emailing, printing on paper or emailing a PDF is a snap.



But the really cool thing about MEMOS is that is that each of your missives can be automatically linked to a contact in your ADDRESS module, or to a specific job in the JOBS module, or both.

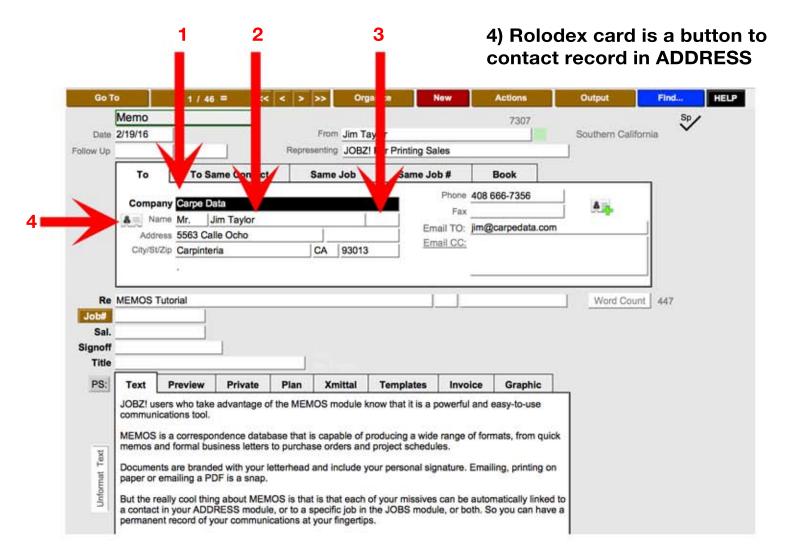
So you can have a permanent record of your communications at your fingertips.

You can easily clone a previous memo or start from pre-written templates that are shared among your workgroup.

Let's start with the most basic use. From the Home Screen or from the MEMOS tab, use the red New button, select New Memo, and you will be taken to the INPUT screen.

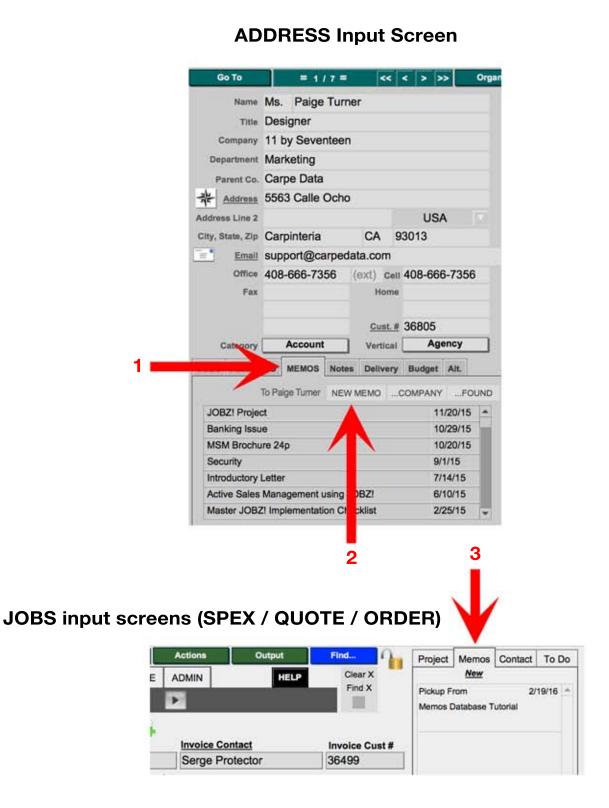
1) Select a company name from your contacts, then 2) a person at that company. Or, 3) select a contact by name instead of company.

Their address information is placed automatically.



This will automatically link the memo to the contact, shown in a portal on that contact's ADDRESS input screen, from which you can return to the document later (1).

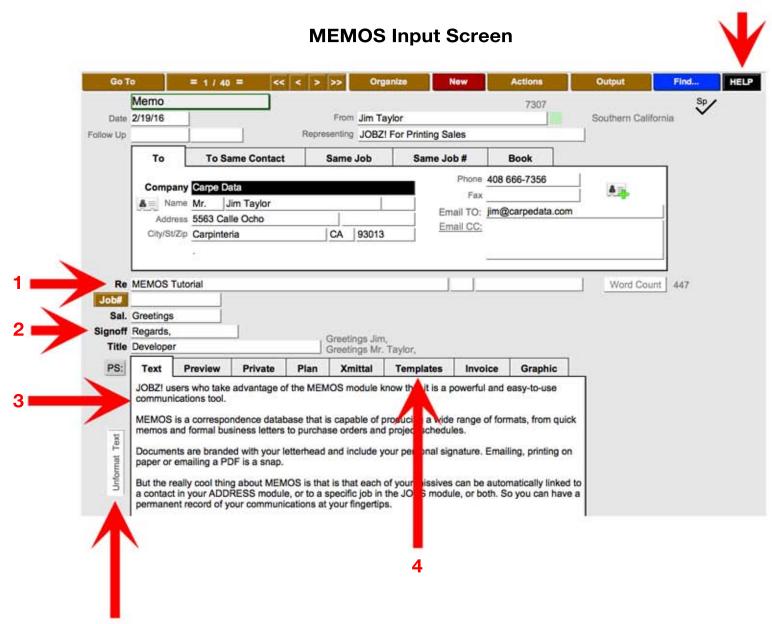
You can also start a New Memo from this portal (2), or from a similar portal within a job (3). You can enter a recipient manually without creating a contact.



Start to compose the memo by entering a subject in the Re: field (1). If you have created the memo from within a job, the subject will automatically be the job's title.

Choose a Salutation, Signoff and your Title, or enter whatever you like in these fields (2).

In the Text field (3), type your text, or click the Templates tab (4) to use something that you or someone else in your workgroup has saved as a Template, such as Introductory Letter, or Equipment List, etc. (Pull down Actions > Save as Template to create one.)



Click Unformat Text button to clear font formatting from pasted text.

When you are ready to go, select the Output pull-down, and either choose one of the formats listed there, such as Memo, or select Output Menu to see all the possible formats.

From whatever format you selected, pull down Output again and decide among the choices there, including a simple Email, Email PDF, PDF, or Print.

Of course, there is a HELP button at the top of the INPUT screen with callouts to explain the features.

There are a host of other capabilities here that you can explore on your own, but the basics are easily mastered, and can enable you to take your communication skills to the next level.



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