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Error! Bookmark not defined.

cBizOne



Welcome to cBizOne On-Line Help

This on-line help manual is designed to instruct users how to perform each feature and task within cBizOne.

You can explore the Contents from the list on the left and click on the selection you want to view for step-by-step instructions including screen shots.

You can also select the Search tab on the left and type in a word or phrase to find any matches within the on-line help system. Your results will display below the search box. Simply click on the result to navigate to that set of instructions.

If you are unable to find what you are looking for, please email support@cbizsoft.com and describe in detail what it is you need assistance with and a ticket will be automatically created and we will assist you in a timely manner.

Also, please send us a Screen Shot of the issue. To create a screen shot, click on <Print Screen> Key, open blank MS Word document, and paste the image into it.

Following is a list of common support requests. Please review these links and if one addresses your issue, click on it to be taken to step-by-step instructions.

1. [Installing cBizOne on Vista](#)
2. [Unable to send eMails using your Mail Server \(SMTP Server\)](#)
3. [Sending Mails using Outlook](#)
4. [cBizBar \(not visible in Outlook or not working\)](#)
5. [Corrupted License File \(Fatal Error 13, etc, when cBizOne is started\)](#)
6. [Installing cBizOne & Connecting cBizOne to cBizSoft Hosted Database](#)
7. [Installing cBizOne & Connecting cBizOne to HCA Hosted Database \(Note: Only for HCA Members\)](#)
8. [Installing cBizOne & Connecting cBizOne to Self Hosted Database](#)
9. [Backup/Restore cBizOne \(or moving cBizOne to a new computer\)](#)
10. [License Expired](#)
11. [License Transfer](#)

Thank you for choosing cBizOne and we look forward to working with you.

cBizSoft's mission is to help Staffing Companies become dramatically more productive and competitive by exploiting the full power of its solutions

General

Options:

On the **Tools** menu, click **Options** to show the [Options window](#). Options window has the following tabs:

- [My Record Tab](#)
- [General Tab](#)
- [EMail Tab](#)
- [Calendar Tab](#)

- **Options in My Record Tab**

1. Enter information about you, which will be used to build the 'VCF' card for outgoing mails.

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- **Options in General Tab**

1. **Database Options:** You can choose MS Access or SQL Server database option. If you choose MS Access as your Database, it will set cBizOne.mdb as your default database. If you choose SQL Server, you will need to enter a [DSN Name](#) in the Database box.
2. **Hosted/Remote Database:** If you are accessing the cBizOne database (SQL Server) remotely, you can check the Hosted/Remote Database box for load-on-demand for optimal remote speed and performance.
3. **cBizOne Data Folder:** If you prefer to share data (Contacts, Consultants, etc.) with multiple users on your network, you may move this folder to a shared network folder and set all users to point to this folder. Otherwise, the given default is recommended.
4. **Employee Resumes Folder:** This is the default folder for the Resumes of consultants who are your employees. You can overwrite this value for any given consultant.
5. **Non-Employee Resumes Folder:** This is the default folder for the Resumes of consultants who are NOT your employees. You can overwrite this value for any given consultant.
6. **Archived Employee Resumes Folder:** This is the default folder for the Resumes of consultants who are archived (Consultants who do not work for you anymore). You can overwrite this value for any given consultant.
7. **Documents Folders:** This is the default folder for the Documents attached to any Entity. You can overwrite this value for any given entity.

8. **Resumes Folder - WEB:** While composing the 'Hotlist', cBizOne automatically inserts WEB Resume Links into the 'Hotlist' if you specify the location of resumes on the WEB. This is optional.
9. **Auto Login:** By checking Auto Login, cBizOne will automatically open when you launch it. If this box is unchecked, you will need to click login from the launch screen.
10. **Start Folder:** This drop down box allows you to select the folder that will load on default when you open cBizOne. Choose from Companies, Contacts, Consultants, Requirements and Calendar.

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- [Options in EMail Tab](#)

SetUp

1. **Outgoing Mail Server (SMTP):** Enter the name of your SMTP server.
2. **Username / Password:** If your SMTP server requires authentication, enter Username and Password. Normally these will be blank.
3. **Reply Address:** You can control where the mail will be 'Replied-To', if the receiver of your mail 'Hits' the 'Reply' button.
4. **Your EMail Name:** Enter your EMail Identity, for example: "Kris, cBizSoft"
5. **EMail Signature:** This is the default signature for all mail types (Plain Mail, Hotlist Mail, Resume Mail and Reqlist Mail). You can [create and assign the default signature](#) for each type of mail.

Advanced

1. **Accounts/Identities:** You can create new or modify existing accounts.
2. **Default Salutation for EMail:** When sending personalized mail, you can customize the salutation for addressing your Contacts and Consultants.
3. **VCard Name:** The name entered here will be used as the attachment name when sending a VCard.
4. **When Sending Bulk Mail...:** When sending 'Bulk Mail' to your contacts, you can control how many contacts will be in the BCC for each mail.
5. **Spell Check Mail...:** Automatically check spelling before sending the mail.
6. **Disable "r;Powered By" Logo in Mails:** This feature is only available to paid customers. By clicking this box, you can remove the "r;Powered By" logo at the bottom of your sent email.
7. **When sending mail, show Icons in System tray:** If checked, it will show email Icons in the system tray when sending emails.
8. **Automatically CC to Email2:** By clicking this box, you will not only send email to the primary email address, but also any email address entered in the Email2 field.
9. **Test Mode:** This is a very useful feature when you are 'test driving the application'. If you turn the **Test Mode** On (checked), all the mails you send will be received by you instead of the recipient(s).

- [Plain Mail Tab, Resume Mail Tab, Hotlist Mail Tab, Reqlist Mail Tab](#)

Since there are four kinds of mails in our industry, cBizOne allows you to customize each type of mail. You can set the following defaults for each type of mail.

1. **Footnotes:** You can enter any text in this, which will be automatically added at the end of the given type of mail. For example, you may want to enter 'Anti-SPAM Disclaimer' in the **Footnotes** of the **Hotlist Mail** Tab.
2. The Mail Tab and Resume Mail Tab contain check boxes for Request Read Receipt and Request Delivery Receipt.
3. The Resume Mail Tab also contains a check box to automatically Attach Resumes when sending Resume Mail. If checked, you will not have to manually attach a resume when making a submittal.
4. The Hotlist Mail Tab includes a Subject box where you can enter a default subject line, which will show in Hotlist Email window.
5. In the Hotlist Mail Tab checking Post Consultants to Web sites when sending Hotlist, will automatically enable you to post your Consultants to our partner web sites when you send a Hotlist Email.
6. The Reqlist Mail Tab includes a Subject box where you can enter a default subject line, which will show in Reqlist Email window.
7. In the Reqlist Mail Tab checking Allow sending Reqlist to Consultants, will enable Reqlist choice in Email Menu in the consultant's folder.
8. In the Reqlist Mail Tab checking Post Requirements to Web sites when sending Reqlist, will automatically enable you to post your Requirements to our partner web sites when you send a Reqlist Email.

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- Options in [Calendar Tab](#)

1. **Default Reminder:** Turn this on (checked), if you want the application to automatically set a reminder every time you create an appointment.
2. **Work Start Time / Work End Time:** Your work start and end time. Used to shade the non-working hours in the calendar.
3. **First Day of Week:** You can customize the calendar to display the first day of week.
4. **Default Snooze:** You can set your default snooze time from the drop down menu.
5. **Share Calendar:** Check the option of 'Show other user's items in my calendar' to see other user's calendar items.
6. **Auto Reminders:** *Birthday, Availability, Visa Expiry, Employment Anniversary, Salary Review etc:* You can choose to remind automatically, and how many days ahead to remind, for the events of your Contact, Consultants.

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Create/Modify Users with Security Permissions:

CBizOne Standard comes with preset permissions. Advanced permissions in cBizOne Pro are highlighted in the Standard version but cannot be used.

On the **Edit** menu, select Users which opens a Users window.



- **To Create a New User**
 - Click on the **New** button, type the User name and Password
 - To give additional permissions, click the Permissions button.
 - If the user doesn't have admin privileges (Manage User Accounts), the user cannot create new UserIds.
- **To Modify a User**
 - Click on the **Modify** button, make the necessary modifications
 - If the user doesn't have admin privileges, all he can change is his password and can see what permissions he have.
- **To Delete a User**
 - Select on the User, which highlights Username.
 - Click Delete
 - If the user doesn't have admin privileges, the user cannot delete any Userid, including his own.

NOTE: By default User Admin as all the [privileges/Permissions](#) set to true.

Initially login as an Admin and then set the new users, if a user is given Manage User Accounts permissions, that user will have Admin privileges.

- **Permissions General:**

- Manage User Accounts: This user can create, modify and delete users and can manage all user permissions/privileges.
- Export Data (Self): If checked, this user can export only the items belonging to his Userid.
- Export Data (Others): If checked, this user can export all the items of other users except his Userid.
- Sync. With Outlook: If checked, this user can Sync data between cBizOne and Outlook.
- Run Reports: If checked, this user can run reports.
- Customize Database: If checked, this user can customize the database.
- Customize Forms/Run Customize Wizard: If checked, this user can customize forms and can run the customize wizard.
- Allow Lookup Setup: If checked, this user has the ability to customize the Lookup setup values.
- Allow Sending Emails: If checked, this user can send emails from the cBizOne application.
- Allow Posting to Web: If checked, this user can post Requirements list and Consultants list to Jobsites. Also the ability to FTP Requirements list and Consultants list to the desired site.
- Allow Global Data Changes: If checked, this user can modify the data globally in the cBizOne database by using FixData Program.

- **Permissions Companies:**

- **Modify Items of:**
 - <All> - This user can modify all Companies Items for all users in cBizOne
 - <None> - This user cannot modify any of the Companies items
 - <Self> - This user can modify Companies items belonging to them.
 - <user1, user2> - This user can modify Companies items of only selected users.
- Delete Items of:
 - <All> - This user can delete all Companies Items for all users in cBizOne
 - <None> - This user cannot delete any of the Companies items.
 - <Self> - This user can delete Companies items belonging to them.
 - <user1, user2> - This user can delete Companies items of only selected users.
- Mark as Private When a New Item is Created: If checked, it will create a Private Companies Item automatically for this user whenever a New Companies Item is created.
- These Users Can See My Private Items:
 - <All> - Everybody can see this user's Private Companies Items.
 - <None> - Nobody can see this user's Private Companies Items

- *<user1, user2>* - Only selected users can see this user's Private Companies Items
 - Can See Other User's Private Items: If checked, this user can see other user's Private Companies Items.
 - Allow Changing UserId of Other User's Items: If checked, this user has the ability to modify the UserIds of Companies Item, i.e. ability to change to different UserID or Add additional Usersid's.
 - Create/Modify/Delete Dynamic Views: If checked, this user has the ability to create, modify and delete Companies Dynamic Views.
 - Create/Modify/Delete Static Views: If checked, this user has the ability to create, modify and delete Companies Static Views.
 - Print Items: If checked, this user can Print Companies List Views.
 - Create MS Excel: If checked, this user can copy Companies list views to Excel Spreadsheets.
- **Permissions Contacts:**
 - Modify Items of:
 - *<All>* - This user can modify all Contacts Items for all users in cBizOne
 - *<None>* - This user cannot modify any of the Contacts items
 - *<Self>* - This user can modify Contacts items belonging to them.
 - *<user1, user2>* - This user can modify Contacts items of only selected users.
 - Delete Items of:
 - *<All>* - This user can delete all Contacts Items for all users in cBizOne
 - *<None>* - This user cannot delete any of the Contacts items.
 - *<Self>* - This user can delete Contacts items belonging to them.
 - *<user1, user2>* - This user can delete Contacts items of only selected users.
 - Mark as Private When a New Item is Created: If checked, it will create a Private Contacts Item automatically for this user whenever a New Contacts Item is created.
 - These Users Can See My Private Items:
 - *<All>* - Everybody can see this user's Private Contacts Items.
 - *<None>* - Nobody can see this user's Private Contacts Items
 - *<user1, user2>* - Only selected users can see this user's Private Contacts Items
 - Can See Other User's Private Items: If checked, this user can see other user's Private Contacts Items.
 - Allow Changing UserId of Other User's Items: If checked, this user has the ability to modify the UserIds of Contacts Item, i.e. ability to change to different UserID or Add additional Usersid's.
 - Create/Modify/Delete Dynamic Views: If checked, this user has the ability to create, modify and delete Contacts Dynamic Views.
 - Create/Modify/Delete Static Views: If checked, this user has the ability to create, modify and delete Contacts Static Views.
 - Print Items: If checked, this user can Print Contacts List Views.
 - Create MS Excel: If checked, this user can copy Contacts list views to Excel Spreadsheets.

- **Permissions Consultants:**

- *Modify Items of:*
 - *<All>* - This user can modify all Consultants Items for all users in cBizOne
 - *<None>* - This user cannot modify any of the Consultants items
 - *<Self>* - This user can modify Consultants items belonging to them.
 - *<user1, user2>* - This user can modify Consultants items of only selected users.
- *Delete Items of:*
 - *<All>* - This user can delete all Consultants Items for all users in cBizOne
 - *<None>* - This user cannot delete any of the Consultants items.
 - *<Self>* - This user can delete Consultants items belonging to them.
 - *<user1, user2>* - This user can delete Consultants items of only selected users.
- *Mark as Private When a New Item is Created:* *If checked, it will create a Private Consultants Item automatically for this user whenever a New Consultants Item is created.*
- *These Users Can See My Private Items:*
 - *<All>* - Everybody can see this user's Private Consultants Items.
 - *<None>* - Nobody can see this user's Private Consultants Items
 - *<user1, user2>* - Only selected users can see this user's Private Consultants Items
- *Can See Other User's Private Items:* *If checked, this user can see other user's Private Consultants Items.*
- *Allow Changing UserId of Other User's Items:* *If checked, this user has the ability to modify the UserIds of Consultants Item, i.e. ability to change to different UserID or Add additional Usersid's.*
- *Create/Modify/Delete Dynamic Views:* *If checked, this user has the ability to create, modify and delete Consultants Dynamic Views.*
- *Create/Modify/Delete Static Views:* *If checked, this user has the ability to create, modify and delete Consultants Static Views.*
- *Print Items:* *If checked, this user can Print Consultants List Views.*
- *Create MS Excel:* *If checked, this user can copy Consultants list views to Excel Spreadsheets.*

- **Permissions Requirements:**

- *Modify Items of:*
 - *<All>* - This user can modify all Requirements Items for all users in cBizOne
 - *<None>* - This user cannot modify any of the Requirements items
 - *<Self>* - This user can modify Requirements items belonging to them.

- *<user1, user2>* - This user can modify Requirements items of only selected users.
 - Delete Items of:
 - *<All>* - This user can delete all Requirements Items for all users in cBizOne
 - *<None>* - This user cannot delete any of the Requirements items.
 - *<Self>* - This user can delete Requirements items belonging to them.
 - *<user1, user2>* - This user can delete Requirements items of only selected users.
 - Mark as Private When a New Item is Created: If checked, it will create a Private Requirements Item automatically for this user whenever a New Requirements Item is created.
 - These Users Can See My Private Items:
 - *<All>* - Everybody can see this user's Private Requirements Items.
 - *<None>* - Nobody can see this user's Private Requirements Items
 - *<user1, user2>* - Only selected users can see this user's Private Requirements Items
 - Can See Other User's Private Items: If checked, this user can see other user's Private Requirements Items.
 - Allow Changing UserId of Other User's Items: If checked, this user has the ability to modify the UserIds of Requirements Item, i.e. ability to change to different UserID or Add additional Usersid's.
 - Create/Modify/Delete Dynamic Views: If checked, this user has the ability to create, modify and delete Requirements Dynamic Views.
 - Create/Modify/Delete Static Views: If checked, this user has the ability to create, modify and delete Requirements Static Views.
 - Print Items: If checked, this user can Print Requirements List Views.
 - Create MS Excel: If checked, this user can copy Requirements list views to Excel Spreadsheets.
- **Permissions Calendar Items/Tasks:**
 - Modify Items of:
 - *<All>* - This user can modify all Calendar Items for all users in cBizOne
 - *<None>* - This user cannot modify any of the Calendar items
 - *<Self>* - This user can modify Calendar items belonging to them.
 - *<user1, user2>* - This user can modify Calendar items of only selected users.
 - Delete Items of:
 - *<All>* - This user can delete all Calendar Items for all users in cBizOne
 - *<None>* - This user cannot delete any of the Calendar items.

- *<Self>* - This user can delete Calendar items belonging to them.
 - *<user1, user2>* - This user can delete Calendar items of only selected users.
- Mark as Private When a New Item is Created: If checked, it will create a Private Calendar Item automatically for this user whenever a New Requirements Item is created.
- These Users Can See My Private Items:
 - *<All>* - Everybody can see this user's Private Calendar Items.
 - *<None>* - Nobody can see this user's Private Calendar Items
 - *<user1, user2>* - Only selected users can see this user's Private Calendar Items
- Can See Other User's Private Items: If checked, this user can see other user's Private Calendar Items.
- Allow Changing UserId of Other User's Items: If checked, this user has the ability to modify the UserIds of Calendar Item, i.e. ability to change to different UserID or Add additional Usersid's.
- Create/Modify/Delete Dynamic Views: Ignore for now.
- Create/Modify/Delete Static Views: Ignore for now.
- Print Items: If checked, this user can Print Calendar List Views.
- Create MS Excel: Ignore for now.
- **Permissions Notes/Status:**
 - Modify Items of:
 - *<All>* - This user can modify all Notes/Status Items for all users in cBizOne
 - *<None>* - This user cannot modify any of the Notes/Status items
 - *<Self>* - This user can modify Notes/Status items belonging to them.
 - *<user1, user2>* - This user can modify Notes/Status of only selected users.
 - Delete Items of:
 - *<All>* - This user can delete all Notes/Status Items for all users in cBizOne
 - *<None>* - This user cannot delete any of the Notes/Status items.
 - *<Self>* - This user can delete Notes/Status items belonging to them.
 - *<user1, user2>* - This user can delete Notes/Status items of only selected users.
 - Mark as Private When a New Item is Created: If checked, it will create a Private Notes/Status Item automatically for this user whenever a New Requirements Item is created.
 - These Users Can See My Private Items:
 - *<All>* - Everybody can see this user's Private Notes/Status Items.
 - *<None>* - Nobody can see this user's Private Notes/Status Items

- *<user1, user2>* - Only selected users can see this user's Private Notes/Status Items
 - Can See Other User's Private Items: If checked, this user can see other user's Private Notes/Status Items.
 - Allow Changing UserId of Other User's Items: If checked, this user has the ability to modify the UserIds of Notes/Status Item, i.e. ability to change to different UserID or Add additional Usersid's.
 - Create/Modify/Delete Dynamic Views: Ignore for now.
 - Create/Modify/Delete Static Views: Ignore for now.
 - Print Items: Ignore for now.
 - Create MS Excel: Ignore for now.
- **Permissions Emails:**
 - Modify Items of:
 - *<All>* - This user can modify all Email Items for all users in cBizOne
 - *<None>* - This user cannot modify any of the Email items
 - *<Self>* - This user can modify Email items belonging to them.
 - *<user1, user2>* - This user can modify Email of only selected users.
 - Delete Items of:
 - *<All>* - This user can delete all Email Items for all users in cBizOne
 - *<None>* - This user cannot delete any of the Email items.
 - *<Self>* - This user can delete Email items belonging to them.
 - *<user1, user2>* - This user can delete Email items of only selected users.
 - Mark as Private When a New Item is Created: If checked, it will create a Private Email Item automatically for this user whenever a New Email Item is created.
 - These Users Can See My Private Items:
 - *<All>* - Everybody can see this user's Private Email Items.
 - *<None>* - Nobody can see this user's Private Email Items
 - *<user1, user2>* - Only selected users can see this user's Private Email Items
 - Can See Other User's Private Items: If checked, this user can see other user's Private Email Items.
 - Allow Changing UserId of Other User's Items: If checked, this user has the ability to modify the UserIds of Email Item, i.e. ability to change to different UserID or Add additional Usersid's.
 - Create/Modify/Delete Dynamic Views: Ignore for now.
 - Create/Modify/Delete Static Views: Ignore for now.
 - Print Items: If checked, this user can Print Email List Views.
 - Create MS Excel: If checked, this user can copy Email list views to Excel Spreadsheets.

To set **Auto login** on, On the **Tools** menu, click **Options** to show the Options window and select [General tab](#).

Views:

Views is a very powerful and unique feature of cBizOne, there are two distinct types of views &endash; **Dynamic and Static**.

Note: Views allows you 'see' data from a given entity (Ex. Contacts) with different perspective.

For example if you want to see:

- only the duplicate **Contacts** in your database (**Duplicates View**)
- only the **Contacts** who have been removed (**Archived View**)
- only the active **Contacts** (**Active View**)

These are 'simple' Views, i.e., information retrieved from any one entity (Ex. Contacts)

Dynamic Views Description

Dynamic views automatically group data into views based on rules defined by the user.

Static Views Description

Static Views are user defined ad hoc groupings of data, users create manually when needed.

Dynamic Views

Dynamic Views have a Collapsible folder list under each Entity in cBizOne. Views can be Created/Modified/Deleted by [right clicking](#) on the [Dynamic Views](#) Folder or by clicking on **View** menu, select **Views** and choose an Item.

- [Customize Existing Views](#)

To Customize the current view click on **View** menu, select **CurrentView** choose **Customize Current View**.

- To Add/Remove fields, select the desired fields and click on the Add/Remove buttons.

- To arrange the fields in the order you want, select the field and click on Move Up and Move Down buttons.
- To modify the SQL query click on Advanced(SQL) if it is enabled.

- **Create New Dynamic Views**

To create new views or edit all views click on **View** menu, select **CurrentView** and choose **Define Views**.

To create a new view, click on **New** button and choose the fields you need.

To modify a view, select the desired view and click on the **Modify** button.

To copy a view, select the desired view and click on the **Copy** button.

To rename a view, select the desired view and click on the **Rename** button.

To delete a view, select the desired view and click on the **Delete** button if it is enabled.

Select **Properties** for using the view for 'list view' or for 'emails' or for 'hiding the view'.

Note: Use **New SQL** and **Modify SQL** buttons if and only if, you are familiar with SQL statements for customizing the views.

Static Views

Static Views have a Collapsible folder list under each Entity in cBizOne. Views can be Created/Modified/Deleted by [right clicking](#) on the [Static Views](#) Folder or by clicking on **View** menu, select **Views** and choose an Item.

- **Creating a New Static View**

To create a New Static View, [right click](#) on a Folder and select **New Static View**. Create the View Name at the top and you can Customize the View and Click on OK.

- **Add Selected Items to a Static View**

You can add single or multiple list view items (using shift or control key for multiple selections) into a Static View by [right clicking on a selected item](#) from any View in a folder and selecting **Add Selected Items to a Static View** and choose a desired Static View.

You can also use drag and drop functionality from a list view to the Static Views with in that folder.

- **Removing Selected Items from a Static View**

To remove items from the Static View, open the desired Static View and select the items you want to remove and then click on Delete button or by [right clicking on a selected items](#) and choose **Remove selected items from the Static View**. This will not delete the items permanently from the database only from the selected Static View.

- **Deleting a Static View**

To delete a Static View, Open the desired Static View, [right click](#) on that Static View and Select **Delete Current Static View**. All items in that Static View will be removed as well as the Static View.

- **Mark Current View as Hidden**

If you want to hide a View, Open the View you want to mark as Hidden, then [right click](#) on that View and select **Mark Current View as Hidden**. Views marked as hidden will not show up when you select Show Non-Hidden Views.

- **Mark Current View as Non-Hidden**

To turn off the Hide feature for a View, first select Show All Views, then open the hidden view, [right click](#) on that View and select **Mark Current View as Non-Hidden**.

- **Show Non-Hidden Views**

To show Non-Hidden Views, [right click](#) on any Folder or View and select **Show Non-Hidden Views**. This will show all the Views which are not Marked Hidden.

- **Show All Views**

To show All Views, [right click](#) on any Folder or View and select **Show All Views**. This will show all the Views including the ones Marked Hidden.

Importing/Creating/Modifying

Import:

Contacts, Consultants can be directly imported from MS Outlook, Outlook Express. If you are using ACT, Goldmine, Maximizer, Netscape, Eudora or any other

contact/Email manager, you need to first export contacts from that application into comma separated/delimited format (CSV). Almost all the applications, including MS Excel allows to export into CSV format.

- [Import from MS Outlook or Outlook Express.](#)
 - [Import from Other applications \(ACT, Goldmine, Maximizer, Netscape, Eudora\)](#)
 - [Import from CSV file \(created in any other application\)](#)
- Import from MS Outlook or Outlook Express
1. On the **File** menu, click **Import and Export...**, which launches the [Import/Export Wizard](#). Select MS Outlook or Outlook Express depending on which application you are importing from and then click **Next** Button.
 2. Select Contacts or Consultants depending on what items you are importing and then click **Next** Button.
 3. Select the desired option in the Duplicates step. If you do not want duplicates (based on the EMail address), select **Do not import duplicate** items option. Click **Next** Button.
 4. Click **Finish** Button. Wizard will start analyzing your items to see how they are organized in Outlook (Categories, Groups, Folders). After analyzing, the wizard will present you [Item Categorization](#)

Create/Modify a Company:

- Click Companies folder in Folder List, to display Companies list.
- To create a Company:
 - On the **File** menu, click **New...**
- To modify a Company:
 - Double click on a Company in [List View](#) to show the Company [Window](#). (You can also open by clicking Open on the File menu)
- Enter/Modify all the desired fields or by using the default [LookUp Values](#).
- Click on Save and Close button on the [toolbar](#) in the Company Window. Automatically saves and closes the window.

Most of the Company fields are self-explanatory. The following fields need some description.

- **General Tab:**
1. **Phone Number fields:** These are smart fields. You can enter the phone number (10 digits) without any spaces or dashes. For example, you can enter 8005551212 x12. For entering country code (outside US, Canada), start with a plus (+) sign. You can click on the Lookup button on the phone number field to see how the application decoded your input. Also by clicking on the [Phone link](#) you can dial automatically, if you configure your computer with the Phone system.

2. **Categories** Button: You can assign multiple categories for each Company. Click on the Categories button and check the desired categories. For example, you can assign "Vendor, Prime Vendor, SAP Vendor" to a contact.
3. **Groups** Button: You can assign multiple **Groups** for each Company. Unlike categories, this allows you to 'profile' Company based on non-professional classification.
4. **Owners** Button: You can assign one or more 'Owners' for each Company. Owner is the person who will be interacting with this Company.

- **QNotes Tab:**

1. **Archived** Box: Check this field to Archive the Company.

- **User Fields Tab:**

1. Ten fields are provided for you to add additional data. You can customize the user fields by using the [Database Designer](#).

Create/Modify a Contact:

- Click Contacts folder in [Folder List](#), to display Contacts list.
- To create a Contact:
 - On the **File** menu, click **New...**
- To modify a Contact:
 - Double click on a Contact in [List View](#) to show the [Contact Window](#). (You can also open by clicking Open on the File menu)
- Enter/Modify all the desired fields or by using the default [LookUp Values](#).
- Click on **Save and Close** button on the [toolbar](#) in the Contact Window. Automatically saves and closes the window.

Most of the Contact fields are self-explanatory. The following fields need some description.

- **General Tab:**

1. **Full Name...:** This is a smart field. You can enter full name without capitalizing or punctuation. For example, you can enter 'mr john doe'. The application decodes the Title, First Name, Middle Name, Last Name and Suffix automatically. You can click on the Full Name button to see how the application decoded your input.
2. **Phone Number fields:** These are smart fields. You can enter the phone number (10 digits) without any spaces or dashes. For example, you can enter 8005551212 x12. For entering country code (outside US, Canada),

start with a plus (+) sign. You can click on the Lookup button on the phone number field to see how the application decoded your input. Also by clicking on the [Phone link](#) you can dial automatically, if you configure your computer with the Phone system.

3. **Company Name:** Enter the company name or click on the Lookup button to link the company if already exists or create a new company from the [link window](#).
4. **Send Hotlist:** Check mark if you will be sending hotlist to this Contact.
5. **Send Reqlist:** Check mark if you will be sending reqlist to this Contact.

- **Details Tab:**

1. **Address Link:** You can display the street map of the contact's address. Street map will be displayed in the built-in browser window. You can switch back to Contacts list by clicking on **Contacts** in the [Folder List](#).
2. **Categories** Button: You can assign multiple categories for each Contact. Click on the Categories button and check the desired categories. For example, you can assign "Vendor, Prime Vendor, SAP Vendor" to a contact.
3. **Groups** Button: You can assign multiple **Groups** for each Contact. Unlike categories, this allows you to 'profile' contacts based on non-professional classification.
4. **Owners** Button: You can assign one or more 'Owners' for each Contact. Owner is the person who will be interacting with this contact.

- **QNotes Tab:**

1. **Archived** Box: Very important field. If a contact requests you to 'remove' from the list, you should not delete the contact, instead Archive the contact. Same rule applies if the contact is obsolete.

- **User Fields Tab:**

1. Ten fields are provided for you to add additional data. You can customize the user fields by using the [Database Designer](#).

Create/Modify a Consultant:

- Click Consultants folder in [Folder List](#), to display Consultants list.
- To create a Consultant:
 - On the **File** menu, click **New...**
- To modify a Consultant:
 - Double click on a Consultant in [List View](#) to show the [Consultant Window](#). (You can also open by clicking **Open** on the **File** menu)
- Enter/Modify all the desired fields or by using the default [LookUp Values](#).

- Click on **Save and Close** button on the [toolbar](#) in the Consultant Window. Automatically saves and closes the window.

cBizOne automatically composes the Hotlist using the information entered for each consultant. Even though most of fields are optional, it is strongly recommended to enter all the known information for each Consultant, particularly in the **General Tab** and **Skills Tab**.

Most of the Consultant fields are self-explanatory. The following fields need some description.

- **General Tab:**

1. **Full Name...:** This is a smart field. You can enter full name without capitalizing or punctuation. For example, you can enter 'ms jane doe'. The application decodes the Title, First Name, Middle Name, Last Name and Suffix automatically. You can click on the Full Name button to see how the application decoded your input.
2. **Phone Number fields:** These are smart fields. You can enter the phone number (10 digits) without any spaces or dashes. For example, you can enter 8005551212 x12. For entering country code (outside US, Canada), start with a plus (+) sign. You can click on the Lookup button on the phone number field to see how the application decoded your input. Also by clicking on the [Phone link](#) you can dial automatically, if you configure your computer with the Phone system.
3. **Date fields:** You can click on LookUp Button on any date field to show the calendar.
4. **Availability Date:** Hotlist will contain only the Consultants who are available now and who will be become available within next 21 days.
5. **Availability Notice:** If the consultant is available but only with a 'Notice', you can enter the notice period. (For example: 2 Weeks).
6. **Send in Hotlist:** If you do not want a consultant to be included in the Hotlist even though the consultant is available, uncheck this field.

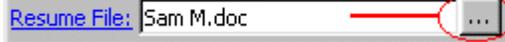
- **Details Tab:**

1. **Address Link:** You can display the street map of the consultant's address. Street map will be displayed in the built-in browser window. You can switch back to Consultants list by clicking on **Consultants** in the [Folder List](#).
2. **Categories** Button: You can assign multiple categories for each Consultant. Click on the Categories button and check the desired categories. For example, you can assign "W2, 1099, Full Time" to a Consultant.
3. **Groups** Button: You can assign multiple **Groups** for each Requirement. Unlike categories, this allows you to 'profile' Consultants based on non-professional classification.
4. **Owners** Button: You can assign one or more 'Owners' for each Consultant. Owner is the person who will be interacting with this Consultant.

- **Skills Tab:**

1. **Job Title:** Job title of the consultant. For example: Oracle DBA or Senior Web developer. Enter the Job Title or select from the [Lookup Window](#).
2. **Skills:** You can enter multiple skills separated by comma or selecting from the [Lookup Window](#).
3. **Additional Info:** You can use it for storing additional information of the consultant. This is used to compose outgoing Resume mail. Normally this is used for References of the Consultant.
4. **Resume File:** Enter the resume file name of the consultant.

You can use the browse button.



5. If you need to open the resume in MS Word, click [Resume File](#) link.

- **QNotes Tab:**

1. **Archived Box:** If a Consultant is terminated from your company, check this field to Archive the Consultant.

- **User Fields Tab:**

1. Ten fields are provided for you to add additional data. You can customize the user fields by using the [Database Designer](#).

Create/Modify a Requirement:

- Click Requirements folder in [Folder List](#), to display Requirements list.
- To create a Requirement:
 - On the **File** menu, click **New...**
- To modify a Requirement:
 - Double click on a Requirement in [List View](#) to show the [Requirement Window](#). (You can also open by clicking **Open** on the **File** menu)
- Enter/Modify all the desired fields or by using the default [Lookup Values](#).
- Click on **Save and Close** button on the [toolbar](#) in the Requirement Window. Automatically saves and closes the window.

cBizOne automatically composes a Reqlist using the information entered for each Requirement. Most of the fields are optional. At minimum, you need to enter **Requirement ID**, **Job Title** and **Description**.

Most of the Requirement fields are self-explanatory. The following fields need some description.

- **General Tab:**

1. **Requirement ID:** It generates a unique ID (Req-0001/Job-0001) or You can enter any unique ID. For example: CA-DBA-001.
2. **Contact:** Enter the contact name or click on the Lookup button to link to an existing contact or create a new contact from the [link window](#).
3. **Send in Reqlist:** If you do not want a requirement to be included in the Reqlist even though the requirement is open, uncheck this field.
4. **Categories** Button: You can assign multiple categories for each Requirement. Click on the Categories button and check the desired categories. For example, you can assign "Vendor, Prime Vendor, SAP Vendor" to a Requirement.
5. **Groups** Button: You can assign multiple **Groups** for each Requirement. Unlike categories, this allows you to 'profile' Requirements based on non-professional classification.
6. **Owners** Button: You can assign one or more 'Owners' for each Requirement. Owner is the person who will be interacting with this Requirement.

- **QNotes Tab:**

1. **Archived** Box: If a Requirement is closed or has no activity, check this field to Archive the Requirement.
2. **Closed Date:** Enter the closed date of the Requirement.

- **User Fields Tab:**

1. Ten fields are provided for you to add additional data. You can customize the user fields by using the [Database Designer](#).

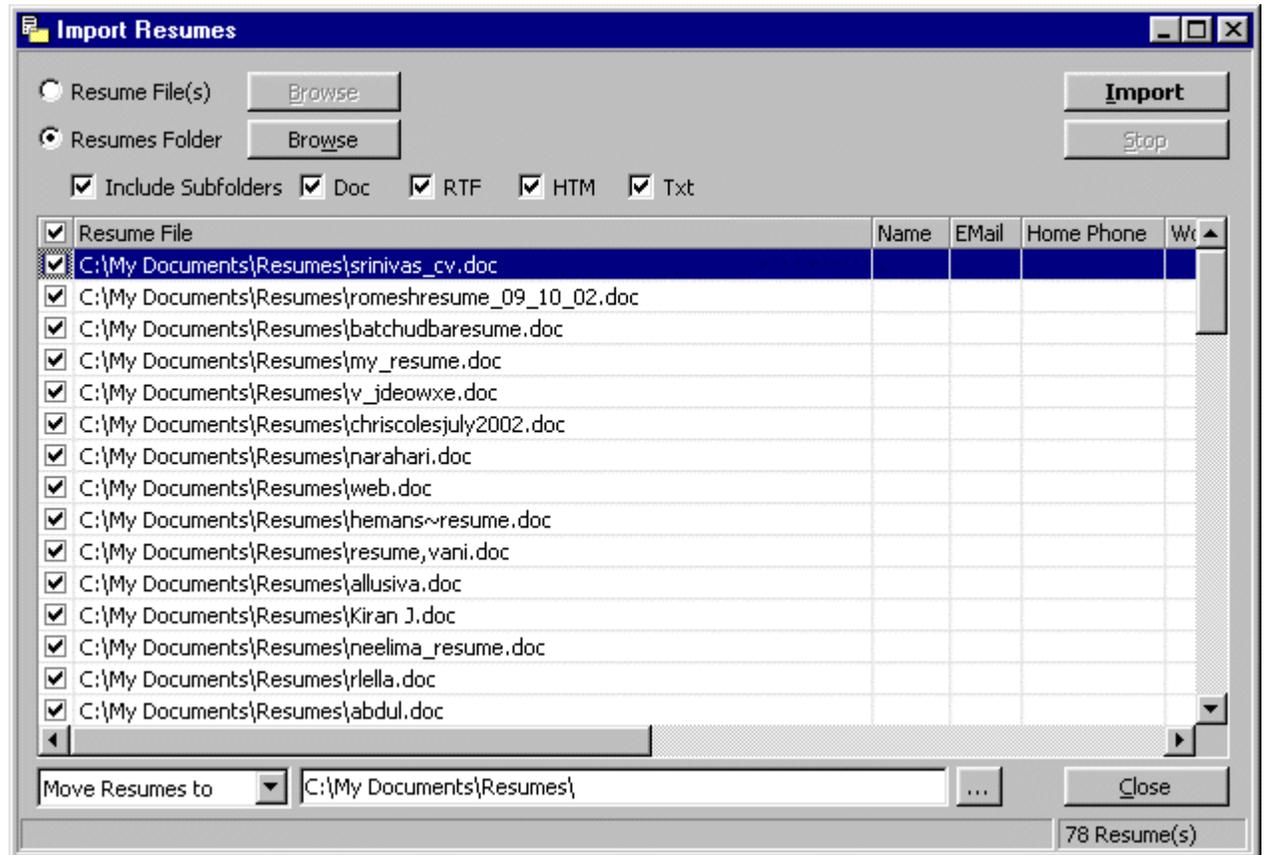
Importing Resumes:

- **Importing single Resume**

- On the **Tools** menu, select **Import Resume(s)** and choose **Single** or click on the Import Resumes icon on the Tool Bar.
- Select [Clip board](#) if the resume is already copied into the clip board, or select **File** and click on **Browse** to select the resume file and then click on **Next** for [Preview](#), or click on **Finish** to process the resume completely.
- Extracts all the skills matching the Primary skills of the consultant in the [LookUp Values](#). Also extracts Name, Phone Numbers, Email and Mailing address from the resume.
- You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
- You can check if the Consultant already exists by checking the duplicates option. If it is a duplicate, you can merge only the selected field values, click **Next** to finish.

- You can select the option of 'Directly add to the database' or 'show Consultant form'.
- You can also choose to attach the resume to the Consultant record, if selected Resume Folder and Name: You can Move/Copy Resume to a default Folder or click on browse to Move/Copy to a particular Folder.
- Click on **Finish** to process the Resume completely.

Importing multiple Resumes



- On the Tools menu, select **Import Resume(s)** and choose Multiple.
- In the Import Resumes window, select **Resumes Folder**.
- Check **Include Subfolders** (If you have any) and check the formats of resumes you want to import, viz. Doc, RTF, HTM and Txt.
- Click on the **Browse** button to select the desired folder to import the resumes from and click Open. (To Import just a few Resumes, use **Select/Unselect** the desired resumes.)
- Select the option of (Move/Copy/Donot Move) from the drop down menu and select the desired folder or use the default folder.
- To Import resumes into the application, click on the **Import** button by selecting all or only the desired resumes.
- Extracts all the skills matching the Primary skills of the consultants in the LookUp Values. Also extracts Name, Phone Numbers, Email and Mailing address from the resume.

Linking Requirements to Contacts:

For all the automatic cross link references you need to assign the Requirement to a Contact when creating a new Requirement.

- To assign a contact to a [Requirement](#), in the **General** tab click on **Contact [LookUp list](#)**, search and select the desired contact and click **OK** or create a new contact by clicking on the **New** button. To unlink the contact click on **Unlink** button.
- If you have already created a Requirement without assigning a Contact to the Requirement, you can create a manual link. Then, from the Contacts folder right click on the desired contact, and select **Link Requirements to Selected Contact** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Requirement and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Requirement and click on **Remove** button.

Linking Contacts to Companies:

For all the automatic cross link references you need to assign the Contact to a Company when creating a new Contact.

- To assign a Company to a [Contact](#), in the **General** tab click on **Company [Lookup List](#)**, search and select the desired Company and click **OK** or create a new Company by clicking on the **New** button. To unlink the Company click on **Unlink** button.
- To assign an already existing Contact to a company, from the Companies folder, right click on the desired Company and select **Link Contacts To Selected Company** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Contacts and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Contact and click on **Remove** button.

Linking Consultants to Companies:

For all the automatic cross link references, you need to assign the Consultant to a Company when creating a new Consultant.

- To assign a Company to a [Consultant](#), in the **General** tab click on **Company Lookup List**, search and select the desired Company and click **OK** or create a new Company by clicking on the **New** button. To unlink the Company click on **Unlink** button.
- To assign an already existing Consultant to a company, from the Companies folder, right click on the desired Company and select **Link Consultants To Selected Company** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Consultants and click on the **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on the **Remove** button.

Searching

Searching Contacts:

Search Bar					Advanced Find...	Clear Search
st		gl			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	Last Name	Company Name	Direct Phone	E Mail 1	Hot List	Req Li ▲

Searching is one most unique feature in cBizOne. Unlike most other Contact/EMail managers (like MS Outlook, ACT), cBizOne does instant **live** searching. For example, if you are searching for *Stephanie Johnson of Global Soft Systems*, you just need to enter "st" in the Name column and "gl" in the Company Name column of the Search Bar. It is proven that, it takes only 3 to 4 keystrokes and fraction of a second to locate a Contact from 10,000+ Contacts. Click **Clear Search** Button to display all Contacts.

- **Searching in one field:**
(For Example: First Name, Last Name, Phone Number, Company Name, EMail Address, etc.)
You can search on any known piece of information. You simply enter first few characters in the corresponding search column.
- **Searching in multiple fields:**
(For Example: First Name and Company Name and Direct Phone)
You simply enter few characters of the first name in the Name column and enter few characters of the company name in the Company Name column and enter few characters of the phone number in the Direct Phone column of the Search Bar.

- **Searching by partial word in one field:**

(For Example: all Contacts with the domain "hotmail.com")

Enter *@hot in the EMail column in the Search Bar. If you enter asterisk (*), the search will locate all the occurrences matching your entry, not just the ones which start with what you entered. For example if you enter *hos in the Last Name Search Column, the search will display all the last names starting with 'Hos' (like Hosman, etc.) and also all the last names containing 'hos' (like Ghosh, Hossain, etc.)

- **Searching by multiple words in one field:**

(For Example: all Contacts in Metro Dallas using area codes)

Enter 972,214,817 in the Direct Phone column in the Search Bar. If you enter a comma, the search will locate all the contacts matching either one. i.e. Matching any word.

Summary:

* (Asterisk) = search anywhere in the column, not just starting from left

, (Comma) = search for multiple - any word

; (Semi-colon) = search for multiple - all words

Searching Consultants:

Search Bar								Advanced Find...	Clear Search
Consultant I D	Display Name	Last Name	Home Phone	Work Phone	Job Title	Total Exp	U S Exp	R: ▲	

Searching is one most unique feature in cBizOne. Unlike most other Contact/EMail managers (like MS Outlook, ACT), cBizOne does instant **live** searching. For example, if you are searching for *Jay Rao, Oracle DBA*, you just need to enter "ja" in the Name column and "or" in the Job Title column of the Search Bar. It is proven that, it takes only 3 to 4 keystrokes and fraction of a second to locate a Consultant from 10,000+ Consultants. Click **Clear Search** Button to display all Consultants.

- **Searching in one field:**

(For Example: First Name, Last Name, Job Title, Home Phone, EMail Address, etc.)

You can search on any known piece of information. You simply enter first few characters in the corresponding search column.

- **Searching in multiple fields:**

(For Example: First Name and Job Title)

You simply enter few characters of the first name in the Name column and enter few characters of the job title in the Job title column of the Search Bar.

- **Searching by partial word in one field:**

(For Example: all Consultants with Java as primary skill)

Enter *Jav in the Primary Skills column in the Search Bar. If you enter asterisk (*), the search will locate all the occurrences matching your entry, not just the ones which start with what you entered.

- **Searching by multiple values in one field:**

(For Example: all Consultants with Java and EJB)

Enter *java;*ejb in the Primary Skills column in the Search Bar. If you enter a semi-colon (;), the search will locate all the consultants matching both. i.e. Matching all words.

Summary:

* (Asterisk) = search anywhere in the column, not just starting from left

, (Comma) = search for multiple - any word

; (Semi-colon) = search for multiple - all words

Searching Requirements:

Search Bar								Advanced Find...	Clear Search
Requirement ID	Job Title	Display Name	Company Name	Job Type	Location	Rate/Salary	Start Date		

Searching is one most unique feature in cBizOne. Unlike most other Contact/Email managers (like MS Outlook, ACT), cBizOne does instant **live** searching. For example, if you are searching for *Requirements* from *Global Soft Systems*, you just need to enter "gl" in the Company Name column of the Search Bar. It is proven that, it takes only 3 to 4 keystrokes and fraction of a second to locate Requirements from that company. Click **Clear Search** Button to display all Requirements.

- **Searching in one field:**

(For Example: Requirement ID, Job Title, Display Name, Company Name, etc.)

You can search on any known piece of information. You simply enter first few characters in the corresponding search column.

- **Searching in multiple fields:**

(For Example: Display Name and Company Name and Requirement)

You simply enter few characters of the name in the Display Name column and enter few characters of the company name in the Company Name column and enter few characters of the Requirement in the Requirement ID column of the Search Bar.

- **Searching by partial word in one field:**

(For Example: all Requirements with Java as Job Title)

Enter *Jav in the Job Title column in the Search Bar. If you enter asterisk

(*), the search will locate all the occurrences matching your entry, not just the ones which start with what you entered.

- **Searching by multiple values in one field:**

(For Example: all Requirements with Java and EJB)

Enter *java;*ejb in the Job Title column in the Search Bar. If you enter a semi-colon (;), the search will locate all the Requirements matching both. i.e. Matching all words.

Summary:

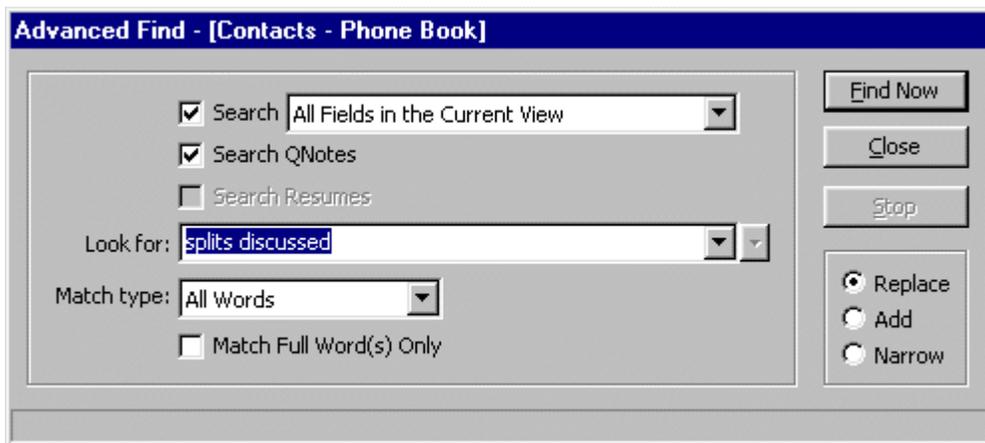
* (Asterisk) = search anywhere in the column, not just starting from left

, (Comma) = search for multiple - any word

; (Semi-colon) = search for multiple - all words

Searching through Notes and All Fields of Contact/Consultants:

Select the folder using [Folder List](#). Select the desired [View](#) of the Contacts or Consultants, then click on **Advanced Find** in the [search bar](#).



- Select **Search** (All Fields in the current View) or to **Search** for single field, select any desired field by clicking on dropdown button.
- Type in the search words, separated by spaces, in **Look for** field, select **Match type** and click **Find Now** button.
- Search will show all the Contacts matching the search criteria.
- To clear the search results, click on **Clear Search** button in the search bar.

Replace: Replaces the previous search results with the new search results

Add: Appends the new search results to the previous existing search results.

Narrow: From the existing search results you can narrow the result with the new search criteria.

Searching through Resumes of Consultants:

Select the Consultant folder using [Folder List](#). Select the desired [View](#) of the consultants, then click on **Advanced Find** in the [search bar](#).

Advanced Find - [Consultants - Active]

Search All Fields in the Current View

Look for: java

Match type: All Words

Match Full Word(s) Only

Search Resumes & QNotes: Use SQL Server's Full Text Search

		Keywords	
Resume	All	c++ corba ejb jsp	OR
Resume	All	java webmethods	AND

Clear

Lookup Field: Primary Skills

Lookup...

Saved Searches: Search 12/6/2004 7:56:33 PM

Save...

Find Now

Close

Stop

Replace

Add

Narrow

In Boolean search window you can search QNotes and Resume (Consultant Views only)

1. First you need to select Resume or QNotes and then Choose:
 - **All** - With all of these words
 - **Any** - With any of these words
 - **Exact** - With this Exact phrase
 - **None** - With none of these words
2. Then enter the desired keywords in the **Keywords** column separated by Space or Comma. Also you can enter the

keywords by selecting from the **Lookup Field** dropdown box and then clicking on the **Lookup** button and selecting the desired keywords from the lookup list.

3. If you are entering keywords in multiple lines you need to choose **AND/OR** for your Boolean searches.
4. If you made a mistake in your Boolean search string you can click on the **Clear** Button to start over.
5. If you want to save this Boolean search string click on **Save Searches** and name the string. You can later access saved search strings from the dropdown box.
6. When you done building your search, click on the **Find Now** button to run your search. If there are items matching your search criteria the Advanced Find window will close.

To view the resume, right click on desired Consultant and select Open Resume. Once Resume is opened, all the search words will be **highlighted**.

To clear this search click on Clear Search in the Search Bar.
If there are no records matching your search criteria Advanced Find window will stay open

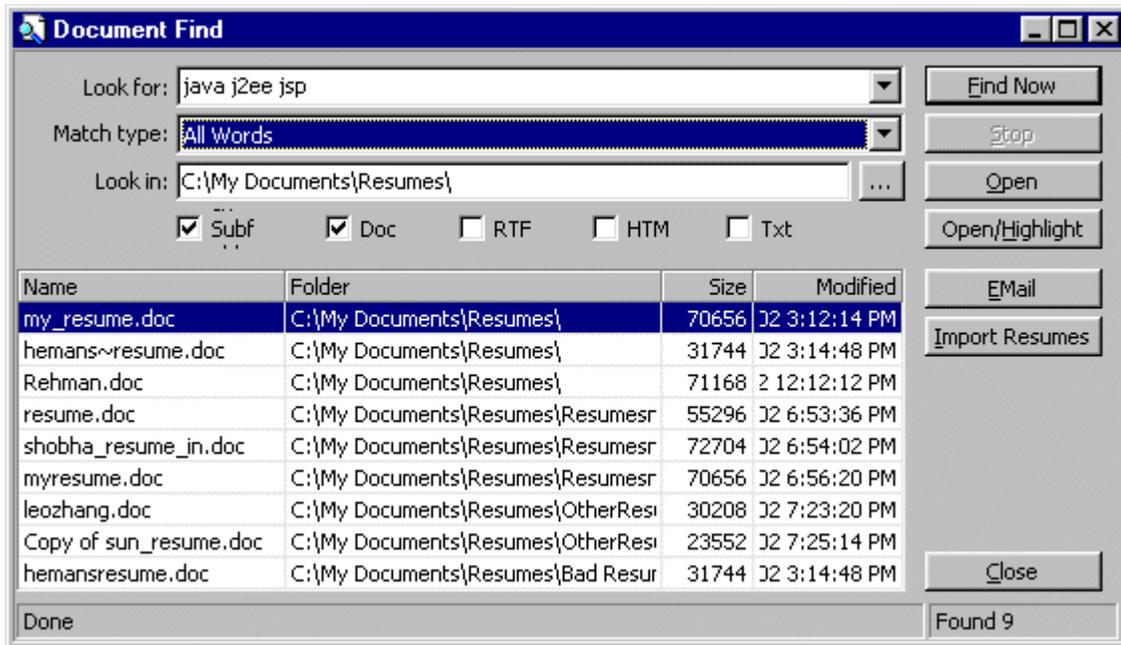
Replace: Replaces the previous search results with the new search results

Add: Appends the new search results to the previous existing search results.

Narrow: From the existing search results you can narrow the result with the new search criteria.

Searching documents (MS Word documents - *.doc, *.rtf):

On the **Tools** menu, click **Document Find** to show the Document Find Window.



Type in the search words, separated by spaces, in **Look for** field (to combine two words as one word, Ex: Visual Basic use "Visual Basic"), select **Match type**, select the folder in **Look in** field and click **Find Now** button. Search will show all the documents matching the search criteria. To view the document, select the document in the list, then either click on **Open** or **Open/Highlight**. Once document is opened using **Open/Highlight**, all the search words will be **highlighted**.

Email: Select the documents in the search window to be emailed and then click on **Email** Button, the email window comes up with attached documents, then select the contact to be emailed.

Import Resumes: Select the documents/resumes in the search window to be imported directly into cBizOne application then click on **Import Resumes** Button, it will extract all the key information from the resume and create a new Consultant record.

Searching Sent Mails:

Search Bar						
Sent From Name	Sent To Display Name	E Mail	Mail Type	Subject	Date	User I Ds

Searching is one most unique feature in cBizOne. Unlike most other Contact/EMail managers (like MS Outlook, ACT), cBizOne does instant **live** searching. For example, if you are searching for *Requirements* from *Global Soft Systems*, you just need to enter "gl" in the Company Name column of the Search Bar. It is proven that, it takes only 3 to 4 keystrokes and fraction of a second to locate Requirements from that company. Click **Clear Search** Button to display all Requirements.

- **Searching in one field:**

(For Example: First Name, Date, EMail Address, Subject, etc.)

You can search on any known piece of information. You simply enter first few characters in the corresponding search column.

- **Searching in multiple fields:**

(For Example: First Name and Subject)

You simply enter few characters of the first name in the Name column and enter few characters of the subject in the Subject column of the Search Bar.

(For Example: All the resumes sent to *John@abc.com*)

Enter "**r**" in the Mail Type column, "**john**" in the EMail column of the Search Bar.

- **Searching by partial word in one field:**

(For Example: Search for a EMail sent to Jane@abc.com with the word excellent some where in the subject)

Enter Ja in the EMail column and *exce in the Subject column of the Search Bar. If you enter asterisk ('*'), the search will locate all the occurrences matching your entry, not just the ones which start with what you entered.

- **Searching by multiple values in one field:**

(For Example: all Requirements with Java and EJB)

Enter *java; *ejb in the Job Title column in the Search Bar. If you enter a semi-colon (';'), the search will locate all the Requirements matching both. i.e. Matching all words.

- **Searching by partial word:**

(For Example: Search for a EMail sent to Jane@abc.com with the word excellent some where in the subject)

Enter **Ja** in the EMail column and ***exce** in the Subject column of the Search Bar. If you enter asterisk (*'), the search will locate all the occurrences matching your entry, not just the ones which start with what you entered.

- **Searching for a EMail which contains Java and EJB in the body:**

If you are not in the **All** view, [change the view](#) to **All**.

Enter *java;*ejb in the Body column in the Search Bar. If you enter a semi-colon (;'), the search will locate all the E-mails matching both. i.e. Matching **all** words.

Summary:

- * (Asterisk) = search anywhere in the column, not just starting from left
- , (Comma) = search for multiple - any word
- ; (Semi-colon) = search for multiple - all words

EMailing

Send EMail to Contacts:

For the regular EMail, Salutation (Dear John:) and Signature is composed automatically. Regular E-mails can be sent to one Contact or all Contacts.

- **Sending EMail to a Contact**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. If the Contact is not visible, [search the Contact](#).
3. Right click the Contact you want to send the Mail and then click **EMail Mail** on the shortcut menu to show EMail Window.
4. Type the EMail Subject and EMail body text.
5. Click **Send** button, to queue your Mail into Outbox Folder.

- **Sending Personalized EMail to all Contacts**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. Right click on any Contact, and then click **EMail Mail** on the shortcut menu to show EMail Window.
3. Click **Options** button, to show [EMail options window](#).
4. In the EMail options window, select **All in the Current View** in **Mail To** options and then click **OK** Button.
5. Type the EMail Subject and EMail body text.
6. Click **Send** button, to queue your Mail into Outbox Folder.

- **Sending Bulk EMail to all Contacts**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. Right click on any Contact, and then click **EEmail Mail** on the shortcut menu to show EMail Window.
3. Click **Options** button, to show [EMail options window](#).
4. In the EMail options window:
 - select **All in the Current View** in **Mail To** options.
 - check **Bulk Mail** and then click **OK** Button.
5. Type the EMail Subject and EMail body text.
6. Click **Send** button, to queue your Mail into Outbox Folder.

Send EMail to Consultants:

For the regular EMail, Salutation (Dear John:) and Signature is composed automatically. Regular EEmails can be sent to one Consultant or all Consultants.

- **Sending EEmail to a Consultant**

1. Click **Consultants** on the [Folder List](#) to open Consultants.
2. If the Consultant is not visible, [search the Consultant](#).
3. Right click the Consultant you want to send the Mail, and then click **EEmail Mail** on the shortcut menu to show EMail Window.
4. Type the EMail Subject and EMail body text.
5. Click **Send** button, to queue your Mail into Outbox Folder.

- **Sending Personalized EEmail to all Consultants**

1. Click **Consultants** on the [Folder List](#) to open Consultants.
2. Select the desired [View](#) (Ex. **Employees - All**)
3. Right click on any Consultant, and then click **EEmail Mail** on the shortcut menu to show EMail Window.
4. Click **Options** button, to show [EMail options window](#).
5. In the EMail options window, select **All in the Current View** in **Mail To** options, and then click **OK** Button.
6. Type the EMail Subject and EMail body text.
7. Click **Send** button, to queue your Mail into Outbox Folder.

- **Sending Bulk EEmail to all Consultants**

1. Click **Consultants** on the [Folder List](#) to open Consultants.
2. Select the desired [View](#) (Ex. **Employees - All**)
3. Right click on any Consultant, and then click **EEmail Mail** on the shortcut menu to show EMail Window.
4. Click **Options** button, to show [EMail options window](#).
5. In the EMail options window:
 - select **All in the Current View** in **Mail To** options.
 - check **Bulk Mail** and then click **OK** Button.
6. Type the EMail Subject and EMail body text.

7. Click **Send** button, to queue your Mail into Outbox Folder.

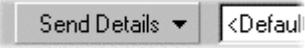
Send Resume:

Resume Mail is composed automatically, of the selected Consultants. The Resume EMail is composed with all the required information, which can be modified before sending the mail. Resume Mail can be sent to a Contact or a Consultant. Resume file (Word document) will be automatically attached.

- **Sending Resume to a Contact**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. If the Contact is not visible, [search the Contact](#).
3. Right click the Contact you want to send the resume, and then click **EMail Resume** on the shortcut menu to show [Resume EMail Window](#).
4. Open the dropdown list of the **Styles** Button and select the desired style.
5. Select the Consultant(s) in the [Consultant List](#) (Turn the check on).
6. Open the dropdown list of **Send Details** Button  and select the desired Resume Mail content.
7. Click **Send** button, to queue your Resume Mail into Outbox Folder.

- **Sending Resume to a Consultant**

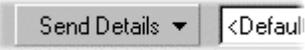
1. Click **Consultants** on the [Folder List](#) to open Consultants.
2. If the Consultant is not visible, [search the Consultant](#).
3. Right click the Consultant you want to send the resume, and then click **EMail Resume** on the shortcut menu to show [Resume EMail Window](#).
4. Open the dropdown list of the **Styles** Button and select the desired style.
5. Select the Consultant(s) in the [Consultant List](#) (Turn the check on).
6. Open the dropdown list of **Send Details** Button  and select the desired Resume Mail content.
7. Click **Send** button, to queue your Resume Mail into Outbox Folder.

Note: Styles are based on XML/XSL. You can create new styles and/or customize existing styles to suit your needs. Since this is beyond the scope of this tutorial, please contact our [support](#) team or visit <http://www.w3schools.com>

Send Hotlist:

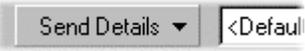
Hotlist is composed automatically, of all the available Consultants. The Hotlist EMail is composed with all the required information, which can be modified before sending the mail. Hotlist can be sent either 'personalized' or 'bulk' to all your Contacts (whose **Send Hotlist** is checked) in the current view. Make sure you are in the [Phone Book View](#) before sending. Hotlist can also be sent to only one Contact.

- **Sending Hotlist to all your Contacts (Personalized)**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. On **EMail** menu, click **Hotlist...** to show [Hotlist EMail Window](#).
3. Open the dropdown list of the **Styles** Button and select the desired style.
4. You can exclude one or more consultants from the Hotlist, by un-checking in the [consultant list](#).
5. Open the dropdown list of **Send Details** Button  and select the desired Hotlist content.
6. Click **Send** button, to queue your Hotlist into Outbox Folder. After queuing, cBizOne starts sending Hotlist to each Contact, whose '**Send Hotlist**' is checked.
7. Click on **Outbox** Folder in the [Folder List](#) to see the status of the Hotlist EMail.

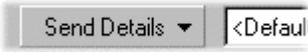
- **Sending Hotlist to all your Contacts (Bulk)**

Sending 'Bulk' is significantly faster than sending 'Personalized'. But there are some disadvantages in using 'Bulk' (see Bounce Wizard in cBizLook)

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. On **EMail** menu, click **Hotlist...** to show [Hotlist EMail Window](#).
3. Open the dropdown list of the **Styles** Button and select the desired style.
4. You can exclude one or more consultants from the Hotlist, by un-checking in the [consultant list](#).
5. Open the dropdown list of **Send Details** Button  and select the desired Hotlist content.
6. Click **Options** button, to show [EMail options window](#).
7. In the EMail options window, check **Bulk Mail** and then click on **OK** Button.
8. Click **Send** button, to queue your Hotlist into Outbox Folder. After queuing, cBizOne starts sending Hotlist to each Contact, whose '**Send Hotlist**' is checked.
9. Click on **Outbox** Folder in the [Folder List](#) to see the status of the Hotlist EMail.

- **Sending Hotlist to one Contact**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. If the Contact is not visible, [search the Contact](#).
3. Select the Contact by clicking on the contact.
4. On **EMail** menu, click **Hotlist...** to show [Hotlist EMail Window](#).

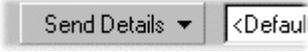
5. Open the dropdown list of the **Styles** Button and select the desired style.
6. You can exclude one or more consultants from the Hotlist, by un-checking in the [consultant list](#).
7. Open the dropdown list of **Send Details** Button  and select the desired Hotlist content.
8. Click **Options** button, to show [EMail options window](#).
9. In the EMail options window, select **Recipients in the Mail Window** in **Mail To** options, and then click **OK** Button.
10. Click **Send** button, to queue your Hotlist into Outbox Folder.

Note: Styles are based on XML/XSL. You can create new styles and/or customize existing styles to suit your needs. Since this is beyond the scope of this tutorial, please contact our [support](#) team or visit <http://www.w3schools.com>

Send Reqlist:

Reqlist is composed automatically, using all the open Requirements. The Reqlist EMail is composed with all the required information, which can be modified before sending the mail. Reqlist can be sent either 'personalized' or 'bulk' to all your Contacts (whose **Send Reqlist** is checked). Reqlist can also be sent to only one Contact.

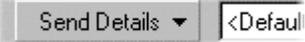
- **Sending Reqlist to all your Contacts (Personalized)**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. On **EMail** menu, click **Reqlist...** to show [Reqlist EMail Window](#).
3. Open the dropdown list of the **Styles** Button and select the desired style.
4. Open the dropdown list of **Send Details** Button  and select the desired Reqlist content.
5. Click **Send** button, to queue your Reqlist into Outbox Folder. After queuing, cBizOne starts sending Reqlist to each Contact, whose '**Send Reqlist**' is checked.
6. Click on **Outbox** Folder in the [Folder List](#) to see the status of the Reqlist EMail.

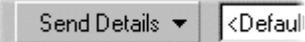
- **Sending Reqlist to all your Contacts (Bulk)**

Sending 'Bulk' is significantly faster than sending 'Personalized'. But there are some disadvantages in using 'Bulk' (see Bounce Wizard in cBizLook)

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. On **EMail** menu, click **Reqlist...** to show [Reqlist EMail Window](#).
3. Open the dropdown list of the **Styles** Button and select the desired style.

4. Open the dropdown list of **Send Details** Button  and select the desired Reqlist content.
5. Click **Options** button, to show [EMail options window](#).
6. In the EMail options window, check **Bulk Mail** and then click on **OK** Button.
7. Click **Send** button, to queue your Reqlist into Outbox Folder. After queuing, cBizOne starts sending Reqlist to all Contacts, whose '**Send Reqlist**' is checked.
8. Click on **Outbox** Folder in the [Folder List](#) to see the status of the Reqlist EMail.

- **Sending Reqlist to one Contact**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. If the Contact is not visible, [search the Contact](#).
3. Select the Contact by clicking on the contact.
4. On **EMail** menu, click **Reqlist...** to show [Reqlist EMail Window](#).
5. Open the dropdown list of the **Styles** Button and select the desired style.
6. Open the dropdown list of **Send Details** Button  and select the desired Reqlist content.
7. Click **Options** button, to show [EMail options window](#).
8. In the EMail options window, select **Recipients in the Mail Window** in **Mail To** options, and then click **OK** Button.
9. Click **Send** button, to queue your Reqlist into Outbox Folder.

Note: Styles are based on XML/XSL. You can create new styles and/or customize existing styles to suit your needs. Since this is beyond the scope of this tutorial, please contact our [support](#) team or visit <http://www.w3schools.com>

Advanced EMail Topics:

Some of the advanced features are explained briefly. These are generally used by 'Power-Users'.

- [Creating multiple HTML signatures.](#)
- [Using signatures.](#)
- [Multiple Accounts/Identities.](#)
- [Sending Emails Through Outlook](#)
- [Views in Email.](#)
- [MailTo switch from entities in E-mail Window.](#)
- [Sending mail \(Hotlist, Reqlist, etc.\) only to certain Categories, Groups, Owners.](#)
- [Sending mail \(Hotlist, Reqlist, etc.\) only to searched Contacts.](#)

- [Changing the order of Consultants or Requirements in the Hotlist/Reqlist.](#)
 - [Deleting queued EMail jobs from Outbox.](#)
 - [Stopping \(Pausing\) EMail Queues \(Hotlist, Reqlist, etc.\)](#)
 - [Address book in the mail Window.](#)
 - [Styles \(Stylesheets and Templates\)](#)
 - [Vcard Name](#)
- **Creating multiple HTML signatures**

Default signature is given in the Options Window. Signatures can also be used as standard template letters.

1. On the **EMail** menu, click **Mail...** to show EMail Window.
2. Click the New Signature button.



- 3.
4. Enter any text and then click **Close** Button.
5. Enter the Signature Name and click **OK** Button.

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- **Using signatures**

1. On the **EMail** menu, click **Mail.../Resume.../Hotlist.../Reqlist..** to show EMail Window.
2. Click on the desired Signature in the Signature Dropdown.

Note: Once you select a signature and send the mail, the same signature will be used next time for that Mail Type. For example, you selected "Hotlist Sig" and send the Hotlist, the "Hotlist Sig" will be automatically used for all the Hotlists in the future. That means you can assign four signatures for four types of Mail.

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- **Multiple Accounts/Identities**

1. On the **EMail** menu, click **Mail...** to show EMail Window.
2. Click the New Account button in the **From** field to show the [New Account Window](#)
3. You can also open [New Account Window](#) by clicking on **Tools** menu, click **Options**, select **Email** tab and choose **Advanced** Tab.
4. To send an e-mail without using your SMTP server select the option **Do not Use My SMTP Server**.
5. Enter the Account name and other pertaining information which is self explanatory and enter **OK** to create new account.

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- **Sending Emails Through Outlook**

1. On the **Tools** menu, click **Options**, select **Email** tab and choose **Setup** Tab. In the **Outgoing Server (SMTP)** field, type Outlook.
2. Or you can create a [New Account](#) and type Outlook in **Outgoing Server (SMTP)** and give account name as Outlook.

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- **Views in E-mail**

In the Resume or HotList/Reqlist mail window, if you want to select only the desired Consultants or Requirements based on the view, open the corresponding E-mail window, look for **View** and select the [desired View](#) from the drop down menu.

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- **MailTo Switch from entities in the E-mail Window**

After the E-mail window is open, you can switch between the entities for the desired recipients by clicking on the [tool bar MailTo](#) and select the desired entity.

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- **Sending mail (Hotlist, Reqlist, etc.) only to certain Categories, Groups, Owners**

1. On the **EMail** menu, click **Hotlist...**, to show Hotlist EMail Window.
2. In the EMail Window on [tool bar](#), click Options, to show [EMail Options Window](#).
3. In the EMail Options Window, click **Custom Filter** option, opens the [custom window](#).
4. Select (check) the desired Categories, Groups, Owners.
5. If you want to set this selection as the default for Hotlist, Click **Save as Default Filter**.
6. Click **OK** button to close EMail Options Window.
7. Click **Send** button.

You can do the same for Reqlist EMail or Regular EMail or Resume EMail.

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- **Sending mail (Hotlist, Reqlist, etc.) only to searched Contacts**

1. Search any combination of Fields using the Live Search Bar and/or Advanced Find. You will see the total number of items found during your search in the Status bar at the bottom left corner of cBizOne.
2. On the **EMail** menu, select Mail type.
3. In the EMail Window on [tool bar](#), click Options to show [EMail Options Window](#).
4. In the EMail Options Window, select **Search List in the Current View** (This will send emails only to the searched list of people) in **Mail To** options and then click **OK** Button.
5. Also you have the option of sending Bulk email or Personalized email

6. Click **Send** button.

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- **Changing the order of Consultants or Requirements in the Hotlist/Reqlist**

1. Click **Contacts** on the [Folder List](#) to open Contacts.
2. On **Email** menu, click **Hotlist...** to show [Hotlist Email Window](#).
3. Initially, Consultants are sorted by Job Title. If you want to rearrange the order of Consultants in the Hotlist Email window, use the drag and drop feature shown below on the left side of the check boxes of Consultants.



You can do the same for Reqlist Email or Resume Email.

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- **Deleting queued Email jobs from Outbox**

1. Open **Outbox** Folder.
2. Select the Email job you want to delete.
3. Click the **Delete** Button on the toolbar (or Delete Key on the keyboard).

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- **Stopping (Pausing) Email Queues (Hotlist, Reqlist, etc.)**

1. Open **Outbox** Folder.
2. Right click anywhere in the List View and then click **Stop Hotlist Queue** on the shortcut menu.
3. To start the queue, click **Start Hotlist Queue** in the shortcut menu.

You can do the same for Reqlist Email or Regular Email or Resume Email.

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- **Address book in the mail Window**

1. On the **E**Mail menu, click **Resume...**, to show Resume EMail Window.
2. In the EMail Window, click **To...** or **CC...** or **BCC...** Button to show [Address Book Window](#).

You can do the same for Regular EMail or Hotlist EMail or Reqlist EMail.

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Styles (Stylesheets and Templates)

Stylesheets

- **Using a Style Sheet to Send Email**

To send an email using a Style Sheet, open a new mail window, Select Styles then choose Style Sheets and select the desired Style Sheet. You can edit in the body of the email before sending.

Note: Stylesheets are based on XML/XSL. You can create new styles and/or customize existing styles to suit your needs. Since this is beyond the scope of this tutorial, please contact our [support](#) team or visit <http://www.w3schools.com> for more information.

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- **Templates**

Templates are HTML documents created in the cBizOne email window, Microsoft FrontPage or other web authoring tools.

- **Create a New Template Email in cBizOne**

To create a new Template from scratch in the body of the email, open a new mail window, Select Styles then choose Templates and select New. New Template Data can be inserted into a template by typing or copying and pasting from another source.

- **Create a Merge Fields Template**

- To create a Template email by pulling data from the cBizOne database and merging it into the email body, Open a mail window, Select Styles choose Templates and select Merge Fields.
- A list of all fields in the database (including all custom fields) will appear in vertical window on the right side of the email window.

- You can begin typing in the email body as you normally would and insert merge fields from the list on the right by selecting a database field and then clicking Insert. This process can be repeated as desired. When the merge email is complete, click send and the merge fields will automatically populate the data for the selected recipient's records from the database.

- **Saving Templates**

- If you want to save the Template you created, on the Email window, click on Styles choose Templates then Save As and give the name of Template and save it to a location of your choice.
- If you edit an existing Template and want to save your changes to the same Template, click on Styles then choose Templates then Save.

- **Send Email using an Existing Template**

If you are using a template created outside of cBizOne, open a new mail window, Select Styles then choose Templates select Open and select the document you want to use. You can then type in the body of a template email as well as merge database fields from cBizOne.

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- **Vcard Name**

1. On the **Tools** menu, click **Options** to show the [Options window](#), select the **Email** Tab and select the **Advanced** tab.
2. In the **Advanced** tab, **Vcard Name** field, you can enter a name for your Vcard.

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Web Posting

Post Consultants to Web Sites:

With few clicks, in couple of minutes, you can post your Consultants to the Web Sites. Your Consultants are accessible to tens-of-thousands of clients. Many of them do not and would not like to receive hotlists.

- **Posting Consultants to Web Sites:**

1. Click **Web/Posting** on the [Folder List](#) to show [posting home page](#).
2. Click on **Post Consultants** Tab.
3. Select the desired Web Sites and Select the Consultants to post.
4. Click on **Post** Button, to start posting.

5. After posting is finished, scroll down to see the posting success/fail report.

Note: If you have not registered with a Web Site, cBizOne will automatically create an account for you, when you post for the first time. Your eMail address is your Username and Password.

Post Requirements to Web Sites:

With few clicks, in couple of minutes, you can post your Requirements to the Web Sites. Your Requirements are accessible to tens-of-thousands of clients. Many of them do not and would not like to receive reqlists.

- **Posting Consultants to Web Sites:**
 1. Click **Web/Posting** on the [Folder List](#) to show [posting home page](#).
 2. Click on **Post Requirements** Tab.
 3. Select the desired Web Sites and Select the Requirements to post.
 4. Click on **Post** Button, to start posting.
 5. After posting is finished, scroll down to see the posting success/fail report.

Note: If you have not registered with a Web Site, cBizOne will automatically create an account for you, when you post for the first time. Your eMail address is your Username and Password.

Calendar (Scheduling Activities)

Scheduling:

- [Scheduling from an Entity](#)
- [Schedule a call/meeting/interview/other/event \(Activity Type\)](#)
- [Schedule a Task](#)
- [Scheduling From Calendar](#)
- Scheduling from an Entity

You can quickly schedule an appointment to any entity. This is a very useful feature, but rarely used in other applications like MS Outlook, etc., because you have to go through cumbersome steps and waits. In cBizOne, using Quick Search, this is easy to use.

1. Select the folder using [Folder List](#).
2. Select the desired item from the [List View](#). For example, *John Doe* in Contacts. You can quickly [search for a Contact](#) using Search Bar.
3. Right click on the item, point to **Schedule**, and then click **Call** or **Meeting** or **Interview** on the [shortcut menu](#) to show the [appointment window](#).
4. Select the appointment date and time and click **OK** button.

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- **Schedule a call/meeting/interview/other/event (Activity Type)**

You can schedule an activity for all the entities *Contacts/Consultants/Requirements/Companies* just by right clicking on any entity record.

- Select the **Sub-Type** from the lookup list and set the **Priority** from the lookup.
- Same appointment can be scheduled for multiple entities mainly used for reporting purposes. For Example, a Consultant is scheduled for an interview against the Requirement belonging to a Contact.
- Set the **Date, Time** and **Duration** to schedule the Activity.
- To activate the pop up reminder check **Reminder**.
- Type descriptive **Subject** for the activity or select from the lookup.
- Type **Notes** to add details about the activity.
- Check **Private** if you want to make private to you, so no other users can see it.
- Select **Ok** to schedule Activity.

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- **Schedule a Task**

You can schedule a Task for all the entities *Contacts/Consultants/Requirements/Companies* just by right clicking on any entity record.

- Select the **Sub-Type** from the lookup list and set the **Priority** from the lookup.
- Set the **Start Date** and **Due Date** to schedule the Task.
- To activate the pop up reminder check **Reminder**.
- Type descriptive **Subject** for the Task or select from the lookup.
- Type **Notes** to add details about the Task.
- Check **Private** if you want to make private to you, so no other users can see it.

- Select **Ok** to schedule Task.

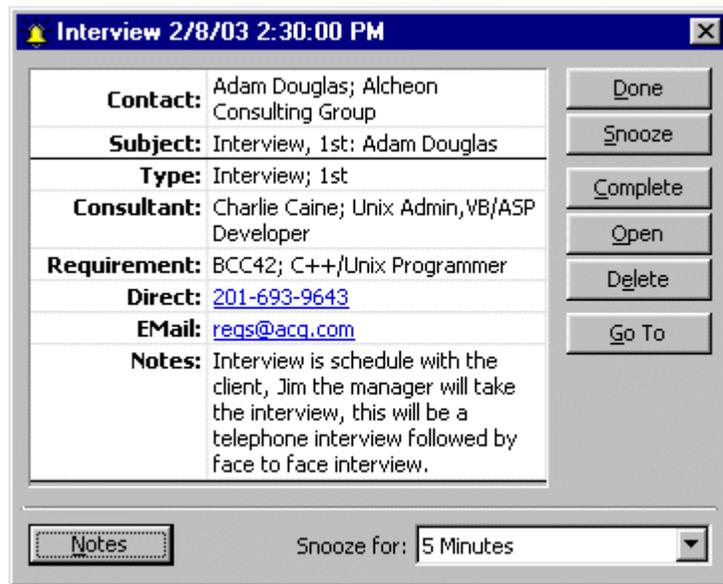
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- **Scheduling From Calendar**

Right Click in the time slot at which you want to schedule the activity, select **Schedule** and then select the type such as **Call** or **Meeting**.

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Popup Reminders:

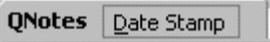


- To have the popup remind you again click on **Snooze** or change the **Snooze For** time and click on **Snooze**.
- To Dismiss the reminder click on **Done**.
- To Delete the reminder click on **Delete**.
- To Reschedule/Modify click on **Open**.
- To track your activities intelligently click on **Complete** and enter your completion and Result Codes.
- Click on **Go To** to see the details of the entity from which you scheduled this activity.
- To view the detailed notes of the current activity click on **Notes**.
- To dial or email click on the links in the reminder pop up.

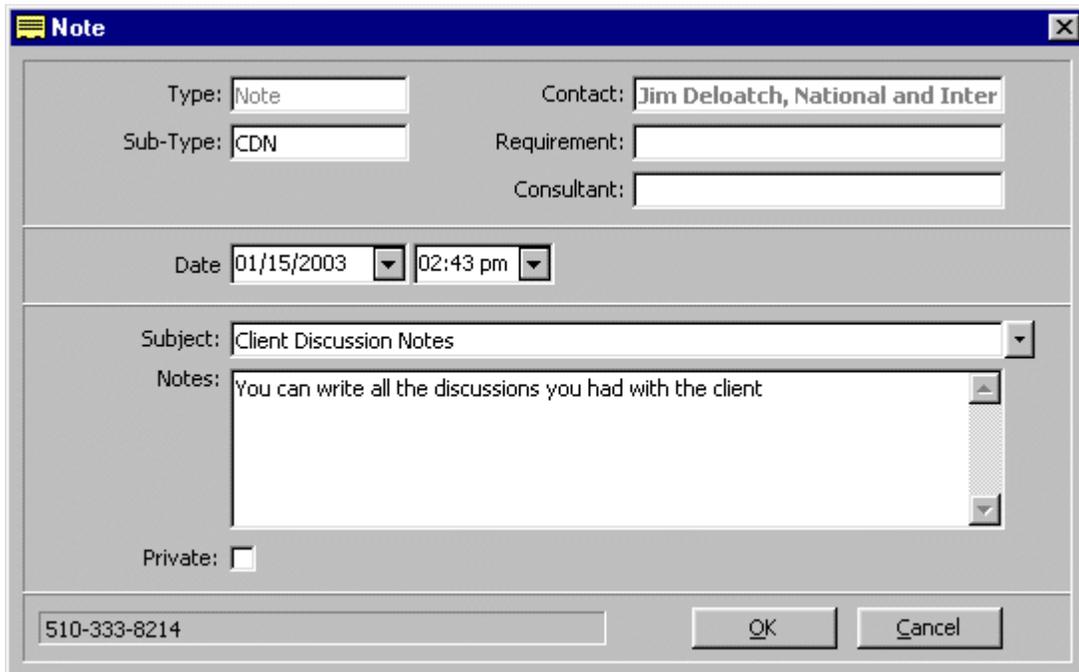
Notes/Attach Documents

Quick Notes:

You can quickly add notes to a Contact or a Consultant or a Requirement or a Company. This is a very useful feature, but rarely used in other applications like MS Outlook, etc., because you have to go through cumbersome steps and waits. In cBizOne, with the combination of Live Search and Auto Save Notes, this is easy to use and it is quick.

1. Select the folder using [Folder List](#).
2. Select the desired item from the [List View](#). For example, *John Doe* in Contacts. You can quickly [search for a Contact](#) using Search Bar.
3. All the existing notes, if any, for that item is displayed.
4. To add notes, click on **Date Stamp** Button.  It will create an entry with User ID with date stamp.
5. Enter your notes for the item. Notes will be saved automatically.

Intelligent Notes:



Note

Type: Contact:

Sub-Type: Requirement:

Consultant:

Date:

Subject:

Notes:

Private:

510-333-8214

You can Add an intelligent note for all the entities *contacts/consultants/Requirements/companies* just by right clicking on any entity record, Select **Note**.

- Select the **Sub-Type** from the lookup list.
- Type descriptive **Subject** or select from the lookup.
- Type **Notes** to add details about the note.
- Check **Private** if you want to make private to you, so no other users can see it.
- Select **Ok** to save it.

Documents:

The screenshot shows a 'Document' dialog box with the following fields and values:

- Type: Document
- Sub-Type: SUB
- Contact: Adam Smith, Synergy, Inc.
- Requirement: (empty)
- Consultant: (empty)
- Date: 01/06/2003
- Time: 02:32 pm
- Subject: SubContractor Agreement
- Notes: This is the standard subcontracting documentt from the client
- Private:
- Document: C:\Program Files\cBiz\DemoData\contract.doc

At the bottom of the dialog, there is a text field containing '972-777-7554', 'OK' and 'Cancel' buttons, and a button with three dots (highlighted with a red circle) for file selection.

You can attach any important documents for all the entities *contacts/consultants/Requirements/companies* just by right clicking on any entity record, Select **Document**.

- Select the **Sub-Type** from the lookup list.
- Type descriptive **Subject** or select from the lookup.
- Type **Notes** to add details about the note.

- Check **Private** if you want to make private to you, so no other users can see it.
- To attach a Document click on the Browse Button in the **Document** field and select from the folder list.
- Select **Ok** to save it.

Submitting/Linking/Placements

Submitting Consultants to Contacts/Requirements:

- **Submitting Consultants to Contacts**

1. To submit a Consultant (resume) to a Contact, right click on the desired Contact, and select **Email Resume** on the [shortcut menu](#) to show the [Resume Email Window](#). Select the desired Consultant from the [Consultant list](#) in the email window. This will automatically create a 'submittal link' of the Consultant to the Contact.

If you submitted the Consultant by other means (Web posting, Fax, etc.), you can manually create a 'submittal link' between the Consultant and the Contact. This can be done from Contacts or Consultants.

- Right click on the desired Contact, and select **Link Submitted Consultants to Selected Contact** in the [shortcut menu](#) to show the [Link Window](#). Search and select the desired Consultant and click on the **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on the **Remove** button.
- Right click on the desired Consultant, and select **Link Selected Consultant To Contacts (Submitted To)** in the [shortcut menu](#) to show the [Link Window](#). Search and select the desired Contact and click on the **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Contact and click on the **Remove** button.

- **Submitting Consultants to Requirements**

1. To submit a Consultant (resume) to a Requirement, right click on the desired Requirement and select **Email Resume** on the [shortcut menu](#) to show the [Resume Email Window](#). Select the desired Consultant from the [Consultant list](#) in the email window. This will automatically create 'submittal link' of the Consultant to the Requirement and in turn to the Contact, if the Contact is linked to the Requirement.

If you submitted the Consultant by other means (Web posting, Fax, etc.), you can manually create 'submittal link' between the Consultant and the Requirement. This can be done from Requirements.

- Right click on the desired Requirement, and select **Link Submitted Consultants to Selected Requirement** in the [shortcut menu](#) to show the [Link Window](#). Search and select the desired Consultant and click on the **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on the **Remove** button.
- **Submitting searched Consultants to Contacts/Requirements**

Once you have the searched list of Consultants, you can email those consultants to the desired contact/Requirement. Select the desired Consultants then Right Click, select **Email Selected Consultants Resume To** on the [shortcut menu](#).

Manually linking Submitted Consultants to Contacts, Requirements:

- **Submitting Consultants to Contacts**

If you submitted the Consultant by other means (Web posting, Fax, etc.), you can manually create 'submittal link' between the Consultant and the Contact. This can be done from Contacts or Consultants.

- Right click on the desired Contact, and select **Link Submitted Consultants to Selected Contact** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Consultant and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on **Remove** button.
- Right click on the desired Consultant, and select **Link Selected Consultant To Contacts (Submitted To)** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Contact and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Contact and click on **Remove** button.
- **Submitting Consultants to Requirements**

If you submitted the Consultant by other means (Web posting, Fax, etc.), you can manually create 'submittal link' between the Consultant and the Requirement. This can be done from Requirements.

- Right click on the desired Requirement, and select **Link Submitted Consultants to Selected Requirement** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Consultant and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on **Remove** button.

Manually linking Received Consultants to Contacts, Requirements:

- **Received Consultants to Contacts**

If you Received the Consultant (resume) by other means (Web posting, Fax, Split, Third Party, etc.), you can manually create 'Received link' between the Consultant and the Contact. This can be done from Contacts or Consultants.

- Right click on the desired Contact, and select **Link Received Consultants to Selected Contact** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Consultant and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on **Remove** button.
- Right click on the desired Consultant, and select **Link Selected Consultant To Contacts (Received From)** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Contact and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Contact and click on **Remove** button.

- **Received Consultants to Requirements**

If you submitted the Consultant (resume) by other means (Web posting, Fax, Split, Third Party, etc.), you can manually create 'Received link' between the Consultant and the Requirement. This can be done from Requirements.

- Right click on the desired Requirement, and select **Link Received Consultants to Selected Requirement** in the [shortcut menu](#), to show the [Link Window](#). Search and select the desired Consultant and click on **ADD** button. Click on **OK** to close the window. If you need to 'unlink', select the Consultant and click on **Remove** button.

Tracking Placements:

You can track placements against *consultants or Requirements* just by right clicking on Consultant record or Requirement record, Select **Status**.

Status of Charlie Caine, Unix Admin,VB/ASP Developer

Type: Contact:

Sub-Type: Requirement:

Consultant:

Date:

Subject:

Notes:

Private:

- Select the **Sub-Type** from the lookup list.
- Type descriptive **Subject** or select from the lookup.
- Type **Notes** to add details about the note.
- Placement of a Consultant is tracked against the Requirement belonging to a Contact.
- Select **Ok** to save it.

Reporting (Hardcopy, PDF, HTML)

Reports:

To run Reports, on the **Tools** menu, select **Reports** or click on **Reports** button on Tool Bar. cBizOne offers 6 categories of reports based on entity in the [Reports menu](#).

- Companies
- Contacts
- Requirements
- Consultants
- Calendar
- General

Companies: On a company level you can run the report of all the contacts belonging to the company and see all the Activities pending, History, Sent Mails and Resume Submittals.

Contacts: You can run the report of all the contacts or group of Contacts or a single Contact and see all the Activities pending, History, Sent Mails, Resume Submittals, Interviews, Placements and address labels.

Requirements: You can run the report of all the Requirements or group of Requirements or a single Requirement and see all the Activities pending, History, Resume Submittals, Interviews, Placements.

Consultants: You can run the report of all the consultants or group of consultants or a single consultants and see all the Activities pending, History, Sent Mails, Resume Submittals, Interviews, Placements and address labels.

Calendar: You run the report of all the activities or appointments of the logged in user.

General: You can run the detailed report of all the Users or a selected user, this report shows any new records created, appointments generated, resume submittals, emails sent by each user.

- **Generating a Report**

- To generate a report select the Report Category and select the desired Report.
- Click on **Preview** tab to see the result of the report, to print it click on **Print** Button.
- To print the report in a PDF or a HTML format, click on the respective button.
- To further customize the report, click on the [Options](#) button.
- Select the **Filter** you want to change the values, click on **Modify Filter** or Double click on the selected filter.
- For [Selected Values](#) you can Check All or selected only.
- For [Multiple Values](#) you enter the values by comma separated full words or partial words.
- For [Date Range Values](#) you can choose All or Selected, with in Selected you can choose **Range** (by checking dropdown box) or **Between** (by choosing the dates from the calendar).
- Select the **Sort** criteria to be sorted based on Ascending or Descending or None.
- Check **Show Notes** – If you want to have the Notes displayed in the report.
- Check **Show Sub-totals** – If you want to have the sub-totals displayed in the report.
- Check **Print these Options** – If you want to have the options you selected to be printed at the bottom of the report.
- Click on **Save Settings** button if you want to save the settings to run the same report again and then click **OK**.

Printing the views:

Along with the [extensive reporting](#), you can also print the views. This will be useful if you want simple printouts, like MS Excel Sheets.

1. Select the folder using [Folder List](#).
2. Select the desired View from the [View Dropdown](#).
3. On **File** menu, select **Print**, which shows the [Print Window](#).
4. Adjust the column widths as desired.
5. Click on the **Print** Button.

Lookups

Lookups:

Lookups are a special type of data entry window that you can access by clicking in those fields for which frequently used or standardized entries are appropriate. cBizOne's lookups allow you to set up standard values for many of cBizOne's data entry fields. These lookup values can be used to save time during routine data entry or to maintain uniformity in cBizOne's data fields.

- [Field Lookup Entry](#)

Click the triangle button in each field to see the define set of values and select the entry you want.

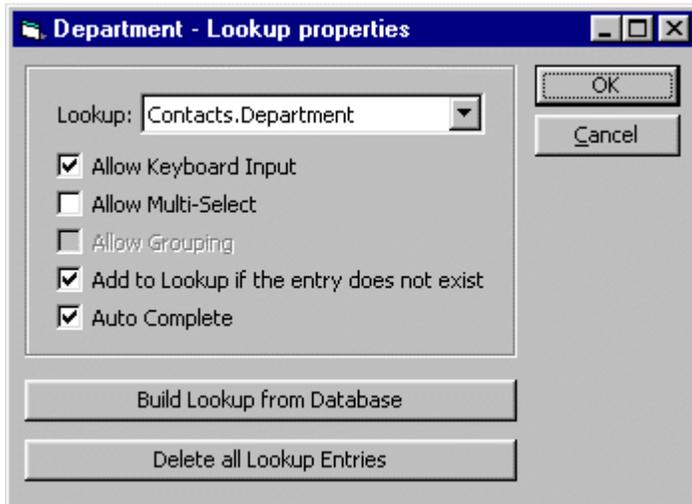


- [Add/Modify/Delete Values to a LookUp](#)

- From the lookup button on the field select **Lookup Window** a [new window](#) opens up.
- To enter a New Value click on **New** button and enter the code for **Value** and **Description** of the value and click **OK**.
- To modify an existing value click on **Modify** button and change the value and description.
- To delete the value click on **Delete** button.

- **Setup**

To change the properties of the field look entry click on **Setup** button



Lookup: This drop down box allows you to select the lookup field values from other fields or you can choose the default.

Allow keyboard input: If it is checked it will allow entering the values in the field or selecting from the lookup values else only selecting from lookup values.

Auto complete: This option will allow to auto complete the words from the lookup values as you type few letters in the fields.

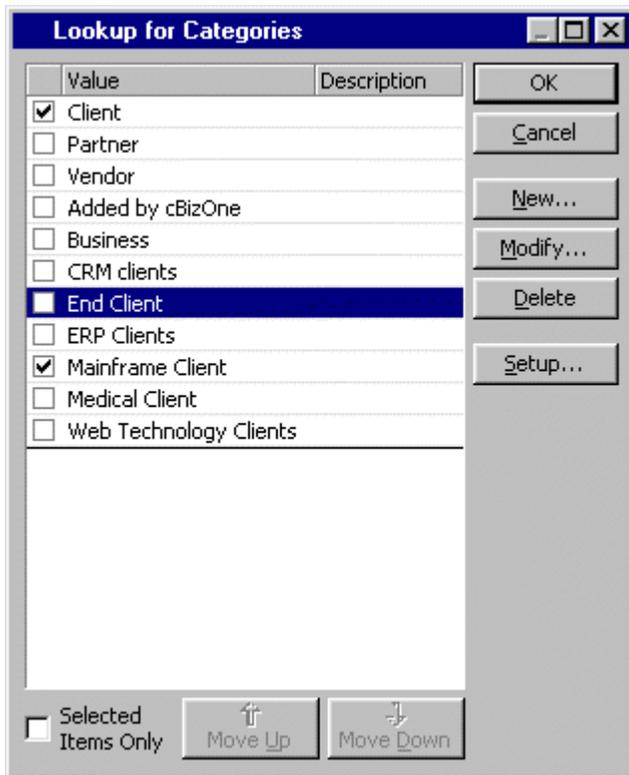
Add to lookup if the entry does not exist: If the field value you entered doesn't exist in the lookup it will automatically add into the lookup values.

Allow Multi-select: This selection allows to select [multiple values](#) for the field.

Allow Grouping: This feature is mainly used for the Consultant skills for [grouping](#). For example languages (Java, C++), Operating systems etc. You can create new group names or modify it, if you want to see all the skills selected for this field, check selected items only, then Move up and move down buttons are enabled so you can put the skills in the order you want it. Also you can collapse or expand the group skills by clicking button on top left of the window.

Create/Modify Categories, Groups, Owners:

To create/modify Categories, Groups, Owners click on the appropriate field name buttons or on the Lookup button. A window pops up.



where you can select one or more values of these field values or you can create new values. For more information on LookUp's please [click here](#).

Customizing

Customize Database (Database Designer):

- **Database Designer**

To customize the database fields, on the **Tools** menu, select **Customize** and choose **Database Designer**. cBizOne application closes and reopens in the design mode.

Changing Entity Captions

- To change the captions of the entities double click on any of the entity and change the [Caption](#) to desired name.

- **Caption/Singular Caption** replaces all the possible occurrences inside the application with the caption you choose here.
- If you like to remove/hide a entity in your folder list click on the **Hide** check box.

Edit/Modify Field properties

- To change the captions of the Field names first select the entity you want to change for and then click on the [Database Fields tab](#).
- Select the field and click on **Open** on the menu or double click on the field and change the **Caption/List View Caption**.
- You can change the **Field Size** and the **Default Value** if it is enabled.
- To remove/hide a field from the application check **Hide**.
- To delete a field completely from the application click on **Delete** if it is enabled.

Create New Field

- To create a [new field](#) click **New** on the menu and enter field **Name** in the caption and select the **Data Type** such as text/date/integer etc. Also if you click on **Usage** drop down box then you can select if it is a phone number or date for auto reminders.
- Use the [Form Designer](#) to place the new fields created at the desired location.

Customize Win-Forms (Form Designer):

- **Form Designer:**
 - To customize the lay out of your forms or to add New Tabs, on the **Tools** menu, select **Customize** and choose **Form Designer**.
 - Once the Customize Window opens up select the **Form Designer** which opens the [Form Modifier](#).
 - To Move a field, click on the Field (White box), and use the mouse to drag to the desired location. Also, you can use <CTRL> and Arrow Keys to move the field.
 - To Resize a field, Mouse-down on one of the "grab-handles" (eight small white squares) and drag. Also, you can use <SHIFT> and Arrow Keys to resize the field.
 - To Remove a field, click on the Field (White Box), and click on the "Remove" button on the Toolbar. Also, you can use <DELETE> key to remove the field.
 - To Change the field caption, right-click on the Caption, and enter the desired caption.

TIP: You can show a grid and Align the Fields to the Grid. Use the Options at the bottom of this window.

- To Add a new custom field, you first need to use the [Database Designer](#) to create the field. All the available fields (i.e. unused fields) will be shown on the **Fields list** on the left.
- To Add a field to the Form, Drag-and-drop the field from the **Fields List** on to the Form.
- To Add a new tab click on the menu bar **Tabs** and choose **Add Tab**.
- To Rename a tab click on the menu bar **Tabs** and choose **Rename Current Tab**.
- To Delete a tab click on menu bar **Tabs** and choose **Delete Tab**.

Click **Save and Close** to save the setting of your form design.

Customize Wizard:

The first and only staffing application which is completely customizable. All customizations are based on open standards (XML, XSL, XSLT, SQL).

cBizOne adapts to you and to your business needs, not vice-versa.

This wizard will help you customize some of the basic aspects of cBizOne. Further user customizations are available in the application.

To customize the entity names, on the **Tools** menu, select **Customize** and choose [Wizard](#).

Other

Data Mining Cross Tabs (XTabs):

Data Mining XTabs is the powerful feature of the cBizOne application, all the information is at your finger tips with few clicks away. Information can be viewed from any Entity level. This information can be customized to view the Data Mining info the way you want it. From within the XTabs you can access any information you need instantly.

QNotes		Activities	History/Notes/Mails	Requirements	Submitted	Received	Documents
Consultant	Job Title	How	Requirement	▼ Sent Date	User I D		
Pat Houston	C/C++ Programmer	Email		2/15/03 10:54:30 PM	cBizSoft		
Abraham		Email		2/5/03 2:34:12 PM	Bob		
Abraham		Manual	QA015	12/18/02 2:35:19 PM	Bob		
Abraham		Email	QA015	8/11/02 2:14:31 PM	sринi		
Ashok Sur	A/Developer	Manual		8/3/02 2:15:07 PM	sринi		
Pat Houst	mer	Manual		8/3/02 2:15:06 PM	sринi		
John Doe	er	Email		11/7/01 5:00:48 PM	Kris		

Following are the XTabs for the Contact Entity, which shows all the information for each Contact selected:

- [QNotes](#)
- [Activities](#)
- [History/Notes/Mails](#)
- [Requirements](#)
- [Submitted](#)
- [Received](#)
- [Documents](#)

- **QNotes**

1. To add notes, click on **Date Stamp** Button. It will create an entry with User ID with date stamp.
2. Enter your notes for the item. Notes will be saved automatically.

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- **Activities**

Shows all the Activities viz. Call, Meeting or Interview pending for this Contact.

- Right click on any of the item and select **Complete** if the Activity is completed.
- Right click on any of the item and select **Schedule** to reschedule a Call, Meeting etc.
- Right click on any of the item and select **Note** to write a note for the Activity.
- Right click on any of the item and select **Document** to attach a document for the Activity.
- Right click on any of the item and select **Open** to modify or to see the details of Activity.
- Right click on any of the item and select **Delete** to delete the Activity.

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- **History/Notes/Mails**

Shows all the history *viz.* Activities completed, Note, Sent and received mails for this Contact.

- Right click on any of the item and select **Open** to open the history item.
- Right click on any of the item and select **Delete** to delete the history item link for this Contact.

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- **Requirements**

Shows all the Jobs received from this Contact.

- Right click on any of the item and select **Schedule** to schedule a Call, Interview etc with the contact for this Requirement.
- Right click on any of the item and select **Note** to write a note for the Activity.
- Right click on any of the item and select **Document** to attach a document for the Activity.
- Right click on any of the item and select **Status** for tracking placements with the contact for this Requirement if you placed a consultant.
- Right click on any of the Requirement item column and select **Go TO** if it is enabled, to view more information of that column(Contact or Consultant or Requirement) and click **Back** button on the [Tool Bar](#) to go to previous folder you are in.
- Right click on any of the Requirement item column and select **Open** if it is enabled, to update or to see the information of the Requirement.

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- **Submitted**

Shows all the Consultants submitted to this Contact through Email or manually.

- Right from the submittals you can schedule the interviews, calls, note and placements, against the current Contact, the Consultant and if any to a requirement, just by right clicking on any of the submittal.
- Right click on any of the submittal column and select **Go TO** if it is enabled, to view more information of that column(Contact or Consultant or Requirement) and click **Back** button on the [Tool Bar](#) to go to previous folder you are in.
- Right click on any of the submittal column and select **Open** if it is enabled, to update or to see the information of the submittal.

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- **Received**

Shows all the Consultants received from this Contact.

- By right clicking on any of the item, you can schedule the interviews, calls, note and placements, against the current Contact and the Consultant.
- Right click on any of the item column and select **Go TO** if it is enabled, to view more information of that column(Contact or Consultant or Requirement) and click **Back** button on the [Tool Bar](#) to go to previous folder you are in.
- Right click on any of the item column and select **Open** if it is enabled, to update or to see the information of this item.

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- **Documents**

Shows all the documents attached to this Contact.

- Right click on any of the item and select **Open** to see the detail information of this item.
- Right click on any of the item and select **Open Document** to open the respective document.
- Right click on any of the document and select **Email Document** to Email the respective document to the Contact.
- Right click on any of the document and select **Delete Document** to delete the respective document link from the Contact. Your original document will not be deleted.

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Phone Dialer:

Using the cBizOne's Auto Phone Dialer you can perform hands free dialing to a specified telephone number. To use this feature, you must have a modem installed in your PC and set up the windows [phone dialer](#) to configure all the dialing properties.

To dial a Phone number

- In the list view click on the button right next to phone number to dial automatically.
- Open any entity window and click on any of the phone fields' link to dial automatically.
- Click on the dropdown of Dial button on the main tool bar and select the phone number to dial automatically.

Once the dialer window comes up you can pick up the phone or click **Hang-Up** on the [Dialer Window](#) to close the connection. To Re dial click on the **Dial** button.

You can set the Modem properties and TAPI properties by clicking on the [Options](#) on the dialer window.

Sync with Outlook:

On the **Tools** menu, select **Sync. with Outlook** or click on Sync Icon on the Tool Bar, opens a [Sync with outlook window](#).

Click on the [Options](#) and select the **Sync. Action** viz. Synchronize or Merge (cBizOne overwrites Outlook) or Merge (Outlook overwrites cBizOne).

If syncing for the first time with Outlook choose Merge (cBizOne overwrites Outlook) and make sure no contact records exists in Outlook. If you choose Merge (Outlook overwrites cBizOne) then make sure no contact records exists in cBizOne.

After the first time it defaults to Synchronize and it will sync the data from Outlook to cBizOne and from cBizOne to Outlook, so any updates or new records created will be synced with both the applications.

From Outlook you can sync with other PDA's.

Map cBizOne Entity Name to Outlook: This field information is used by the cBizOne application to represent if it is a contact or a consultant record for syncing. You can map it to any field in Outlook by selecting the dropdown box.

- **To Synchronize Contacts**
 - Select Sync. Contacts, and then select Contact Categories (All or Selected) and click **OK**.
 - Click on **Synchronize** button to sync the contacts.
 - Displays the result Added, Updated and Deleted.
 - Click **Close** to exit.

- **To Synchronize Consultants**
 - Select Sync. Consultants, Consultant Categories (All or Selected) and click **OK**.
 - Click on **Synchronize** button to sync the Consultants.
 - Displays the result Added, Updated and Deleted.
 - Click **Close** to exit.

Export:

Contacts, Consultants, Requirements, Companies and Calendar can be exported to comma separated/delimited format (CSV). Almost all the major Contact/EMail applications allow to import using this format.

- **Export from cBizOne to CSV format**
 1. On the **File** menu, click **Import and Export...**, which launches the [Import/Export Wizard](#).
 2. Select Export to Comma Separated File and then click **Next** Button.
 3. Browse and select the CSV file, to which the items will be exported.
 4. Select Contacts or Consultants or Requirements or Companies or Calendar depending on what items you are exporting and then click **Next** Button.
 5. Choose [Advanced Options](#) if you want export only part of the list.
 6. Click **Finish** Button to start exporting.

Backup:

- **How do I back up my data?**

All the information of your Companies, Contacts, Consultants, Requirements, Calendar, Sent Mails will be stored in the Access Database in a file **cbizOne.mdb**. This file can be located in **cbizdata** folder under '*C:\Program Files\cBiz\cbizData*' if you installed as standalone application. If you set it up in a network environment it will under **cbizdata** folder on your network. Also you can check the path of cBizOne Data folder in [Options window](#).

You need to back up the all the files and folders under the **cbizdata** folder, which also includes all the XML files and any customization files.

Note: We do recommend the backup at regular intervals so you will not lose your important information, incase if the database got corrupted or the hard disk got crashed.

Grab IT (Contact or Company information from signatures and Consultant resume from clipboard)

- **Capture Contact Information**

- First, copy the selected text (like signature) into the clipboard using copy command or control C.
- On the **Tools** menu, select **Grab IT** or click on the Grab IT icon on the Tool Bar.
- Extracts all the Contact information like Name, Phone Numbers, Email and Mailing address from the selected text which shows in the [preview](#) screen.
- You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
- You can check if the Contact already exists by checking the duplicates options. If it is a duplicate, you can merge only the selected field values, click **Next** to [finish](#).
- You can select the option of 'Directly add to the database' or 'show Contact form'.
- Click on **Finish** to complete the process.

- **Capture Company Information**

- First, copy the selected text (like signature) into the clipboard using copy command or control C.
- On the **Tools** menu, select **Grab IT** and choose **Company**.
- Extracts all the Company information like Company Name, Phone Numbers, Mailing address, WebPage from the selected text which shows in the [preview](#) screen.
- You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
- You can check if the Company already exists by checking the duplicates options. If it is a duplicate, you can merge only the selected field values, click **Next** to [finish](#).
- You can select the option of 'Directly add to the database' or 'show Company form'.
- Click on **Finish** to complete the process.

- **Capture Consultant Information**

- First, copy the selected text from the resume into the clipboard using copy command or control C.
- On the **Tools** menu, select **Grab IT** and choose **Consultant**.
- Extracts all the skills matching the Primary skills of the consultant in the [LookUp Values](#). Also extracts Name, Phone Numbers, Email and Mailing address from the resume.
- You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
- You can check if the Consultant already exists by checking the duplicates option. If it is a duplicate, you can merge only the selected field values, click **Next** to [finish](#).
- You can select the option of 'Directly add to the database' or 'show Consultant form'.
- You can also choose to attach the resume to the Consultant record, if selected [Resume Folder and Name](#): You can Move/Copy Resume to a default Folder or click on browse to Move/Copy to a particular Folder.
- Click on **Finish** to process the Resume completely.

cBizBar

Options:

On the **Tools** button ([cBizbar](#)), click **Options** to show the [Options window](#). Options window has the following tabs:

- [General Tab](#)
- [cBizOne Tab](#)

Options in General Tab_

1. **Duplicates:** To apply the duplicates filter check the field. A mail is a duplicate, if it is received from the same sender with same subject, same size and same day. You can move to a separate folder or mark the mail as duplicate.
2. **Mail to URL:** Check this field, if you want to automatically open the cBizOne Email window for all your default email window.

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Options in cBizOneTab

When ever you are adding Contacts and Consultants to cBizOne, using incoming mails, you can set the following defaults.

1. **Turn on 'Send Hotlist':** Check the field, if you want to send the 'Hotlist' to the newly added Contacts.
2. **Turn on 'Send Reqlist':** Check the field, if you want to send the 'Reqlist' to the newly added Contacts.
3. **Categories:** Enter the Categories name, you want to assign to the newly added Contacts/Consultants.
4. **Groups:** Enter the Groups name, you want to assign to the newly added Contacts/Consultants.
5. **Owners:** Enter the Owners name, you want to assign to the newly added Contacts/Consultants.

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Reply to a Mail using cBizOne or MS Outlook:

You can reply to a mail using either cBizOne or MS Outlook.

- If the mail is Replied using cBizOne, the mail will in the Outbox/Sent Mails folders of cBizOne.
- If the mail is Replied using MS Outlook, it will be in the Outbox/Sent Items folders of MS Outlook.

- **Reply to a Mail using cBizOne:**

1. Select the EMail, and then click **Reply** Button ([cBizbar](#)) to show EMail Window.
2. Enter the EMail content in the EMail Window of cBizOne.
3. Click **Send** button, to queue your Mail into Outbox Folder of cBizOne.

Note: On Windows 2000, under rare instances, the EMail Window is minimized. Simple click on the EMail Window Button on the Start Bar. We are investigating the problem.

- **Reply to a Mail using MS Outlook:**

1. Select the mail you want to reply.

2. Click **Reply** button on Outlook Toolbar to show Outlook's EMail Window.
3. Enter the EMail content.
4. Click **Send** button, to queue your Mail into Outbox Folder of MS Outlook.

Reply to a Resume request EMail:

You can respond to a EMail requesting a resume with few clicks. The reply mail will be composed automatically. The mail will be in the Outbox Folder of cBizOne. Once the mail is sent, it will be in the Sent Items Folder of cBizOne.

1. Select the EMail, and then click **Reply** Button ([cBizbar](#)) to show EMail Window.
2. Change the **Mail Type** to **Resume** in the EMail Window.



3. Select the Consultant(s) in the [Consultant List](#) (Turn the check on).
4. Click **Send** button, to queue your Resume Mail into Outbox Folder.

Note: On Windows 2000, under rare instances, the EMail Window is minimized. Simply click on the EMail Window Button on the Start Bar. We are investigating the problem.

Adding Contacts from Incoming Emails:

You can add a Contact with couple of clicks. The Contact will be added only if the Contact is not already in the cBizOne's database. That means the Contact will NOT be added, if the Contact has been archived in the past or the Contact is currently active.

1. Select the EMail, and then click **Add to** Button ([cBizbar](#)) and then select **Add to Contacts**.
2. Read the Status Bar message, which shows the result.

Note: If the incoming has a "VCF" attachment it will add/update the Person's Name, Company Name, Email Address, Phone Number and Fax Number. It can also add/update from the XML file.

Adding Consultants from Incoming Emails:

You can add a Consultant with couple of clicks.

1. Select the EMail, and then click **Add to** Button ([cBizbar](#)) and then select **Add to Consultants**.
2. Extracts all the skills matching the Primary skills of the consultants in the [LookUp Values](#). Also extracts Name, Phone Numbers, Email and Mailing address from the resume.
3. Consultant [window](#) shows up all the extracted information, make any necessary changes and click on **Save and Close**.

Note: If the incoming mail has an attachment it will extract all the information from it or from the body of an Email and attaches the email body to the notes field of the consultants.

Adding Requirements from Incoming Emails:

You can add a Requirement into the database with a couple of clicks. This email should be generated through a Requirement Web Form.

1. Select the EMail, and then click **Add to** Button (in the [cBizbar](#)) and then select **Add to Requirements**.
2. Read the Status Bar message, which shows the result.

Note: For setting up Web Forms, please contact us.

Import Resumes from Incoming Emails:

You can import resumes directly from an incoming Email attachment to the Consultant folder of cBizOne. You can import resumes from a single selected Email or a group of selected Emails.

- [To Import a Resume with single selected Email:](#)

- Select the EMail, and then click **Add to** Button ([cBizbar](#)) and then select **Add to Consultants**.
- This will go through [Import Resume Wizard](#).
- **To Import Resumes from a group of selected Emails:**
 - Select the E-mails, and then click **Add to** Button ([cBizbar](#)) and then select **Add to Consultants**.
 - This will process one email at a time.
 - Extracts all the skills matching the Primary skills of the consultants in the [LookUp Values](#). Also extracts Name, Phone Numbers, Email and Mailing address from the resume.
 - Consultant [window](#) shows all the extracted information, make any necessary changes and click on **Save and Close**.

Adding Email Addresses which are in 'To' and 'CC' (i.e. Recipients) to cBizOne Contacts:

Many times you will be receiving mails with thousands of Email addresses from your competition's address book. You can add these Contacts with couple of clicks. A Contact will be added only if the Contact is not already in the cBizOne's database. That means the Contact will NOT be added, if the Contact has been archived in the past or the Contact is currently active.

1. Select the EMail, and then click **Tools** Button ([cBizbar](#)) and then select **Add Recipients to Contacts**.
2. Read the Status Bar message, which shows the result.

Note: If you are adding thousands, this operation may take a long time (roughly 10 minutes per thousand).

Processing a 'Remove' Mail (i.e. Archiving a Contact):

You can remove a Contact (i.e. Archive) with couple of clicks, if you receive a Remove request mail. The Contact will be archived even when the mail is received from a forwarded address, if 'Bulk Mail' feature of the cBizOne was NOT used to send the mail.

1. Select the EMail, and then click **Archive** Button ([cBizbar](#)).
2. Confirm the 'Are you sure you want to Archive this Contact?' message box.
3. Read the Status Bar message, which shows the result.

Opening the Mail Sender (Contact) in the cBizOne:

You can open a Mail Sender (Contact). This feature is occasionally needed. For example, if *John Doe* sends you a mail indicating his phone number changed. You want to Open *John Doe* in cBizOne and modify his phone number.

1. Select the EMail, and then click **Tools** Button ([cBizbar](#)) and then select **Open Sender** to show the [Contact Window](#).
2. Modify the Contact as needed.
3. Click **Close**  button on the [toolbar](#) in the Contact Window. Automatically saves and closes the window.

Removing Contacts whose mails bounce repeatedly (Bounce Wizard):

You can remove Contacts if the mails sent to them bounce repeatedly. To use the Bounce Wizard, the mails should have been sent by cBizOne and the 'Bulk Mail' feature was NOT used.

1. On the **Tools** button ([cBizBar](#)), click **Bounce Wizard...**, which launches the [Bounce Wizard](#). Follow the instructions and then click **Finish** Button.

Note: Bounce Wizard will write a log file 'BounceArchiveLog.txt' in the installation folder (Example: 'c:\Program Files\cBiz\Temp').

Adding Notes to Incoming EMail:

You can attach Notes to incoming emails. This notes will NOT be sent, if you reply or forward the email with notes.

1. Select the EMail, and then click **Mail Notes** Button ([cBizbar](#)).
2. Click **Date Stamp** Button. Enter your notes for the EMail. Click **Close** to save it.
3. To view the Notes of the EMail, select the EMail, and then click **Mail Notes** Button ([cBizbar](#)).

Grab IT (Contact or Company information from signatures and Consultant resume from clipboard)

- **Capture Contact Information**

- First, copy the selected text (like signature) into the clipboard using copy command or control C.
- On the **GrabIT** Button ([cBizbar](#)), choose **GrabIT - Contacts**.
- Extracts all the Contact information like Name, Phone Numbers, Email and Mailing address from the selected text which shows in the [preview](#) screen.
- You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
- You can check if the Contact already exists by checking the duplicates options. If it is a duplicate, you can merge only the selected field values, click **Next** to [finish](#).
- You can select the option of 'Directly add to the database' or 'show Contact form'.
- Click on **Finish** to complete the process.

- **Capture Company Information**

- First, copy the selected text (like signature) into the clipboard using copy command or control C.
- On the **GrabIT** Button ([cBizbar](#)), choose **Grab IT - Company**.
- Extracts all the Company information like Company Name, Phone Numbers, Mailing address, WebPage from the selected text which shows in the [preview](#) screen.
- You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
- You can check if the Company already exists by checking the duplicates options. If it is a duplicate, you can merge only the selected field values, click **Next** to [finish](#).
- You can select the option of 'Directly add to the database' or 'show Company form'.

- Click on **Finish** to complete the process.
- **Capture Consultant Information**
 - First, copy the selected text from the resume into the clipboard using copy command or control C.
 - On the **GrabIT** Button ([cBizbar](#)), choose **Grab IT - Consultant**.
 - Extracts all the skills matching the Primary skills of the consultant in the [LookUp Values](#). Also extracts Name, Phone Numbers, Email and Mailing address from the resume.
 - You can make corrections either by typing in the grid or by dragging from the text box and dropping into the grid. After making the necessary changes, click on **Next** to check for [duplicates](#).
 - You can check if the Consultant already exists by checking the duplicates option. If it is a duplicate, you can merge only the selected field values, click **Next** to [finish](#).
 - You can select the option of 'Directly add to the database' or 'show Consultant form'.
 - You can also choose to attach the resume to the Consultant record, if selected [Resume Folder and Name](#): You can Move/Copy Resume to a default Folder or click on browse to Move/Copy to a particular Folder.
 - Click on **Finish** to process the Resume completely.

Duplicate Emails:

If you are receiving hundreds of Emails everyday, you can filter the duplicate Emails to go to the deleted items folder or to any other folder instead of coming to your inbox folder. An Email is treated as duplicate if it is received from the same sender with the same subject, same size and same day. To apply the duplicates filter:

- On the **Tools** button ([cBizBar](#)), click **Options** to show the [Options window](#).
- Check **Apply Duplicates Filter** and then select either Mark it as duplicate or move it to a specified folder.

Attaching Incoming Emails to an Entity:

You can attach any incoming Emails to any Entity (Companies, Contacts, Requirements, Consultants). To attach an Email to a Contact:

- Select the EMail, and then click **Link Mail To** Button ([cBizbar](#)) and then select **Link Mail To Contact**.
- A [window opens up](#), search and select the desired Contact and click **OK**.
- You can view the attached Email in [History X-Tabs](#) of Contacts.
- To see the contents of the attached Email, right click on the item in X-Tabs and click **Open**.

Note: You can even delete the email from outlook after linking the Email to the company/Contact/Consultant/Requirement. It will still show the body contents of the email in an HTML page.