

Global Address Master™ Startup Instructions

Opening Global Address Master™ for the First Time

Open Global Address Master™ from the desktop or from the start menu, under “All Programs”. The first time you open Global Address Master™, it will take care of a few more setup steps automatically. Please contact me if any message box shows up warning of any problem, so I can help you get set up.

Importing Contacts from Outlook

Once Global Address Master™ is open, you will be looking at the Main Page of the menu system. A good place to start is to import all your contacts from Outlook, if you have any there. From the Main Page, select “Update Contacts in Other Programs”, then select “Update To & From Outlook”.

A dialog box will open for you to select a contacts folder from Outlook. For example: “Personal Folders\Contacts”, or “Business Contact Manager\Business Contacts”. You will be prompted what to do with the first new address from Outlook. Answer by pressing “Append All From *{the name of your Outlook folder}*.” Once the addresses from any given folder are in Global Address Master™, you should not use the “Append All...” button again.

If you have additional folders in Outlook, you can repeat this process by adding another dataset. Run “Update To & From Outlook” again, and from the “Dataset Selector” dialog box select the “Add New” button. Selecting “Append All...” again will overwrite any overlapping contact records. By not selecting “Append All...,” you can have a chance to look at duplicates and merge them together manually, but you may have to answer the dialog box many times, because you’re not dismissing it with “Append All...”

Don’t worry about multiple datasets; even though Global Address Master™ brings them together, it also remembers from what dataset or datasets each record came and only updates each dataset with the records that belong to it. If a record belongs to more than one dataset, you can get rid of inconsistencies and begin to enjoy the advantages of Global Address Master™.

Editing Contact Information After Importing

Once you have one or more datasets, you can look at the records by going to the Main Page, then selecting “Add, Edit, or Lookup Contact Information”. This opens a contact data entry screen.

If there were any unresolved questions from the import, you may have already been prompted to resolve them and the contact data entry screen may have been opened for you. You don’t have to resolve these questions at this moment, but they are probably not very difficult. Mostly look for

textboxes with text highlighted in red. Some of these may be hidden until you click the tabs for the various pages in the middle of the screen.

Usually what's needed is for you to press a button to break something down into its parts; for example, if it's a name, pressing the arrow button pointing toward the parts will break it down into first, middle and last names; or if it's an address, pressing the arrow button pointing toward the parts will break it down into Street, City, State and Zip Code.

Sometimes what's needed is for you to compare two versions of a record to make sure all the best information is in one record, the keeper, and then you can archive the other record. In such cases a dubious record may be marked with "-OL" (for "Outlook") at the end of the File As entry, such as "Smith, John-OL".

If you accidentally find you have dozens of such dubious records and just want to delete them all, you can do so by selecting "Eliminate Duplicate Contacts" from the Main Page, then selecting "Delete All Dubious Contacts From Outlook".

Highlighting Fields Shared with Outlook

You may wonder which of the textboxes have data that is used by Outlook. You can highlight these by looking in the upper right of the screen, finding "Highlight Fields Used By", and selecting "Outlook". Any changes you make in these highlighted textboxes will be saved in Outlook the next time you perform the Update. Or, if you make changes to these items in Outlook, the changes will show up here the next time you perform the Update.

Running Frequent Updates

It's a good idea to run the Update process about once a day, to avoid making some changes in the Global Address Master™, and some in Outlook, on the same record. This may result in losing some of your changes, or you may end up dealing with the dubious record as outlined above. This is obviously not the preferred method.

Formatting Foreign Addresses

You may find it interesting to try entering foreign addresses. These can be broken down by pressing the button, and then if you aren't using the correct format for the foreign address, you will be asked whether you want to use the appropriate format for that country. (Sometimes the parts will not be correctly identified, so you will have to move them to the correct textbox; but if the person who submitted the address tried to follow that country's formatting rules, then incorrectly identified parts are likely to be a less frequent occurrence.) Once the parts of an address are in their correct places, you

can reformat the address as you like by selecting a different format from the list; you don't necessarily have to use the correct format for a given country.

Adding Name Blocks

Before you can print a contact's record, you will need to create a Name Block. Usually you can make a selection from the drop-down list. Making another selection will add that to the Name Block, until you have what you want. You can also edit the Name Block manually. The Name Block must be done for all contacts. It takes some work, but gives you the flexibility of controlling exactly what you want to appear at the top of the mailing label, regardless of which Address Block you use.

Specifying Mailing Address, Billing Address, Shipping Address and Return Address

Be sure to specify at least one address (Business, Home or Other) for the Mailing Address. You can also specify addresses for Billing and Shipping. Adding an address to Return Address adds it to a limited list from which you can select return addresses to use on envelopes.

Using "Selected" Contact Records

Near the upper right corner is a checkbox labeled "Selected". Any record that's selected will be included when you print labels or envelopes; if none are selected, none will print. You can find the next record that's selected by pressing the "Find Next Selected" button.

You can view all the records that are selected as a list by going to the Main Page, selecting "Select Contacts to Print Out or Work On", then "View Selected Contacts".

Selecting Subsets of Contacts

An efficient way to select contact records is to click on "Select Subsets of Contacts", also on the "Select Contacts..." page. You may want to start by pressing "Clear All Subsets".

Next you should include a broad subset, and after that you should exclude smaller subsets. For example, let's say you want to send a certain newsletter to everyone who has signed up for it and speaks English. You could Include subset of contacts where Categories contains "Newsletter X". (This depends on your previously marking the appropriate records with "Newsletter X" in the Categories textbox.) Press "Apply Selection". Now you could Exclude subset of contacts where Primary Language does not contain "English". Press "Apply Selection". You are now ready to print your labels or whatever. Press "Done" and you will see a list of all selected records. Make sure the list is correct and fix any discrepancies before going on. You may have to repeat the selection process.

Processing Combined Postal and E-mail Lists

If you want to send out a mailing to some with postal addresses and others with e-mail addresses, an efficient way to do this is to click on “Process Mailing (Combining Print & E-mail Lists)” from the “Select Contacts...” page. First you will see the “Select Subsets of Contacts” dialog box already described.

When you finish with this dialog box, you will be taken to a second dialog box, where you can select a subset of the above to which you want to send e-mail. A recommended way to do this is to categorize the postal records as “Newsletter X” and the e-mail records as “Newsletter X by E-mail”, for example. Now press “Process Mailing” and it will save a distribution list of e-mail addresses and mark the rest for printing labels.

You can copy the distribution list from the Notepad file to your clipboard and when you create the new message in Outlook, you can paste the distribution list in the “Bcc” field. This stands for “Blind carbon copy” and means that the entire distribution list will get their copy, but they won’t see a long list at the top of their e-mail. We do not yet offer the capability of sending a separate e-mail to each entry on the list.

Printing Labels, Envelopes, Mailing Lists, etc.

You can get to the page labeled “Print Labels, Envelopes, Mailing Lists, etc.” either from the Main Page or from the “Select Contacts...” page.

Presumably your contacts from Outlook have an address selected as the Mailing Address, either Business, Home or Other. This will show up accordingly in the Global Address Master™. But if any contact does not have a Mailing Address selected, it will print as a blank address. (Presumably you are checking all the labels in Preview before wasting paper.) So the way to fix a blank address is usually to go to that contact record and assign either Business, Home or Other to the Mailing Address.

Printing labels or envelopes is fairly self-explanatory. For printing envelopes you will need at least one return address. The way to do this is to open the contact data entry screen, find the record to use for a return address, and select that address as a return address. For example, navigate to the record for *Your Name* in the File As box. In the lower right, where it says “Return Address”, click the down arrow and select Business, Home or Other. Now this will show up in the dialog box for printing envelopes.

To adjust the margins for labels, when previewing them, you can use File, Page Setup to adjust the margins slightly. This should be done with care, and hopefully you won’t need to do so.

A Reference Mailing List is an address and phone list that you can print out and keep near your phone. You might also want to note address changes or the like to enter the next time you’re using the Global Address Master™.

Note-Taking Sheets are one sheet per selected contact that you can print out for an interview or more extensive notes.