

Newforma Contact Directory Quick Reference Guide

This topic provides a reference for the Newforma Contact Directory.

Purpose

The **Newforma Contact Directory** gives users access to the central list of companies and contacts in the Project Center Server database outside of any project team. Users can also access and send mail merged form letters or emails to any contact from the **Contact Directory**.

You must be a Content or Global Administrator to modify or add contacts and companies in the directory, add or update form letters and modify Keyword lists.

Audience

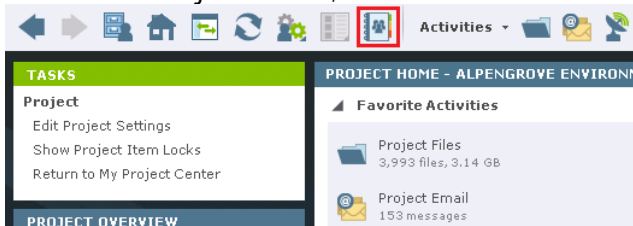
Internal project team members.

Key Features

- View company and contact information in Newforma Project Center, from Outlook via the Project Center Add-in for Microsoft Outlook, as a stand-alone application on your desktop, and via the Info Exchange website.
- Track notes and project assignments on contacts and companies.
- Use form letters to produce general mailings by merging contact information into your own customized Word merge templates.
- Generate emails to selected contacts.
- Allow Content and Global Administrators to modify keyword lists from the **Contact Directory**.

To access the Newforma Contact Directory

1. From within Project Center, select the **Newforma Contact Directory** button on the toolbar.



2. From Outlook, select the **Newforma Contact Directory** button on the **Newforma** toolbar.



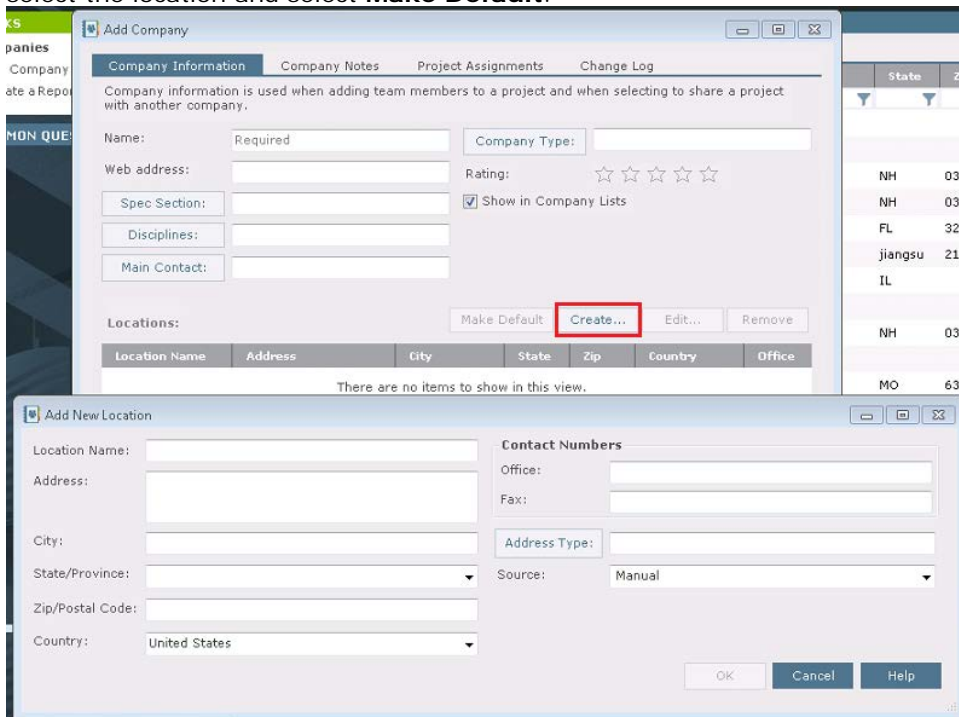
To add a company

You must be a Content or Global Administrator to add a company.

1. Before adding a new company, use the column filters to make sure the company does not already exist. If it does not exist, proceed to the next step.
2. To add a company to the **Newforma Contact Directory**, select the **Companies** tab and select **Add Company** from the **Tasks** panel.



3. Enter the company **Name** and other information you want to track in the **Add Company dialog box**.
4. Select **Create** in the **Locations** section to add at least one address location. Multiple locations can be added if needed. If there is more than one location, the default location is shown in bold. To change the default location, select the location and select **Make Default**.

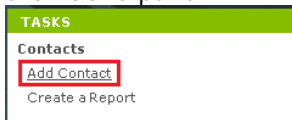


5. On the **Company Notes** tab select **Add** to add notes and relate them to a project, if desired.
6. The **Project Assignments** tab displays any projects on which the company has project team members or is assigned a role. This tab is empty for a new company.
7. Select **OK** to create the company.

To add a contact

You must be a Content or Global Administrator to add a contact. If you are adding multiple contacts for a company, it is best to add the company record first, then add the contacts.

1. Before adding a new contact, use the column filters to make sure the contact does not already exist. If it does not exist, proceed to the next step.
2. To add a contact to the **Newforma Contact Directory**, select the **Contacts** tab and select **Add Contact** from the **Tasks** panel.

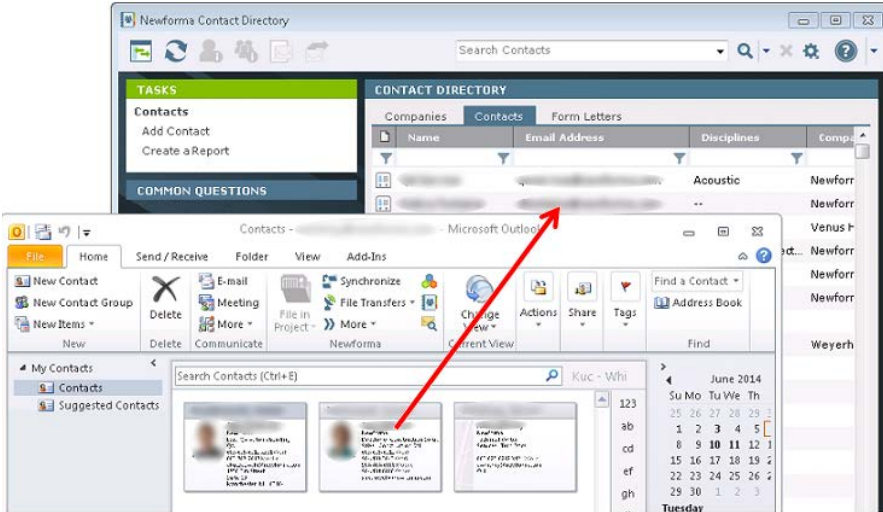


3. Enter the **Email Address**, **First Name**, **Last Name**, and other information you want to track in the **Add Contact dialog box**.
4. In the **Company** section, select **Company** to associate the contact with an existing company. Select the location for the contact from the **Office Location** drop-down. Select the **Use Office Address** checkbox if you want the address from the selected office location to be used. Otherwise, you can type in an address.

5. Select the **Show in Contact Lists** checkbox if you want this contact to be visible in contact dialog boxes and lists through Project Center.
6. Select **OK** to create the contact.

To add contacts from Outlook

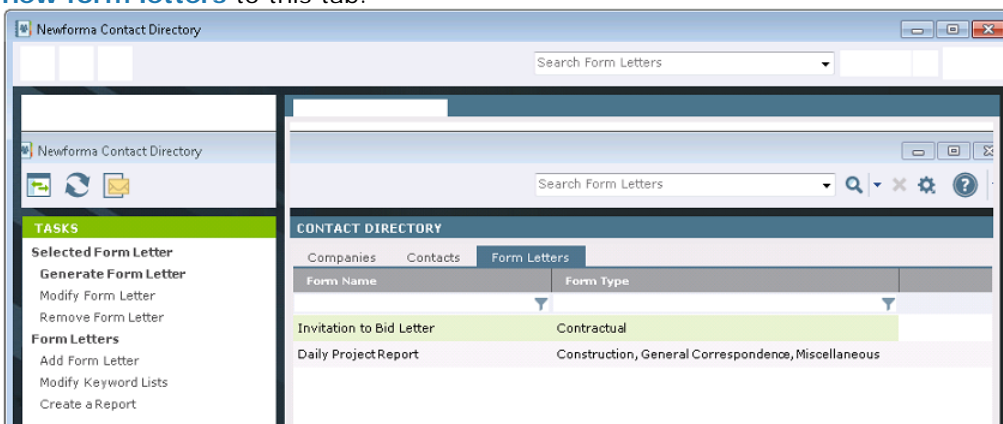
Another way to add contacts is to drag and drop them from Outlook (one at a time or multiples). Once added, select **Modify Contact** from the **Tasks** panel to edit the information if needed (example: edit the company with which they are associated). You can also select **Add to Outlook Contacts** from the **Tasks** panel if you want to copy a contact from Newforma back to Outlook.



To generate form letters or emails

Use the **Form Letters** tab to generate form letters or emails to one or multiple contacts listed in the directory.

If you have a Content Administrator's permissions you can also add, modify or remove form letters. Form letters are global, so forms that are added on a Project Center Server are replicated to all other Project Center servers in the enterprise, which allows for standardized form letters. Newforma uses Microsoft Word as the editor for forms used within Project Center and utilizes the mail merge engine to produce a completely customized look and feel for all Project Center forms. Please refer to [Modify the Supplied Microsoft Word Templates or Create a New Word Template](#) for adding or modifying form letter templates. Refer to Newforma Help for detailed instructions on [adding new form letters](#) to this tab.



1. To generate form letters or send email messages, select the form letter you want to generate. Select **Generate Form Letter** from the **Tasks** panel. The **Generate Form Letter dialog box** opens. Select the **Contacts** icon to select which contact(s) you want to send the form letter or email message to.

2. The **Choose Contacts** dialog box opens. Choose from **All Contacts** or open the drop-down to select from only internal or external contacts. Continue to filter the list using any of the columns to find the contacts you want, then select them all by filling in the checkbox at the top or select each contact's checkbox as needed. Select **OK**.

Name	Email Address	Disciplines	Company	Company Role	Work
<input checked="" type="checkbox"/> Carrie Fletcher	cfletcher@hardscape.com	Construction	Hardscape Construct...	--	999-7
<input type="checkbox"/> Albert Sanderson	albert@unitedconcrete.com	Concrete, Constru...	United Concrete Servi...	--	999-4
<input type="checkbox"/> Glenda Shaffer	gshaffer@yankeeconcrete.com	Concrete, Constru...	Yankee Concrete	--	999-2
<input checked="" type="checkbox"/> William Lockhart	wlockhart@superior.com	Construction	Superior Roofing & C...	--	999-3
<input checked="" type="checkbox"/> Jeff Weber	jweber@springfieldconst.com	Construction	Springfield Construc...	--	633-5
<input checked="" type="checkbox"/> Marc Rios	mrios@springfieldconst.com	Construction	Springfield Construc...	--	603-5
<input checked="" type="checkbox"/> Maryanne Giordano	mgjordano@springfieldconst...	Construction	Springfield Construc...	--	633-3
<input checked="" type="checkbox"/> Chet McFarland	cmcfarland@springfieldconst...	Construction	Springfield Construc...	--	603-5
<input type="checkbox"/> Anand Patel	apatel@springfieldconst.com	Acoustic, Architect...	Springfield Construc...	--	542-6

3. Continue to fill out the information needed on the **Step 1** dialog box, including specific information under the **Fields** section for project information, company logo and dates if needed. In the **Output** section, choose the letter format by selecting either **Word Document**, **PDF Document** or **Email Message** from the **Format** drop-down.

The screenshot shows the 'Generate Form Letter - Invitation to Bid Letter' dialog box. The title bar indicates 'Step 1 of 2: Choose Contacts, Field Values, and Output Options'. The main area is divided into several sections:

- Contact Name:** A list of contacts including Carrie Fletcher (Hardscape Construction), William Lockhart (Superior Roofing & Construction), Jeff Weber (Springfield Construction), Marc Rios (Springfield Construction), Maryanne Giordano (Springfield Construction), and Chet McFarland (Springfield Construction).
- Form Letter Instructions:** A text area containing 'No instructions were specified'.
- Fields:** A section with a 'Project' dropdown menu set to '1999009.00 - Alpengrove Environmental Science Ce'.
- Output:** A section with a 'Format' dropdown menu set to 'PDF Document', a 'Filename' text box containing 'Newforma Mail Merge', and a 'Save Copy In' dropdown menu set to 'Project Default Outgoing Folder'.
- Email Options:** A section with an 'Attachment Options' dropdown menu set to 'Attach to draft email message', a 'Subject' text box containing 'Invitation to Bid', and a 'CC:' text box.

Navigation buttons at the bottom include '< Back', 'Next >', 'Cancel', and 'Help'.

Create a Word Document or PDF

If you select Word Document or PDF Document, modify the default **Filename** as desired and indicate if and where you want to save a copy of the output. If you are not emailing the document, be sure to select **Do Not Send as Attachment** in the **Attachment Options** field, located under the **Email Options** section. Select **Next**.

This close-up shows the 'Email Options' section of the dialog box. The 'Attachment Options' dropdown menu is expanded, showing the selected option 'Do not send as attachment' with a small icon to its left.

Email with Attachment

If you want to send an email with an attachment, select either the **PDF Document** or **Word Document** format in the **Output** section. In the **Email Options** section select either **Attach to Draft Email Message** or **Attach and Send Email Message**. Add a subject and optionally indicate who to CC. Select **Next**.

Recommendation: Select **Attach to Draft Email Message** if you want to add text to the body of the email before sending. The body of the email will be blank by default with the document attached. Note that selecting **Attach and Send Email Message** will not allow you to edit the email before it is sent.

This close-up shows the 'Output' and 'Email Options' sections. In the 'Output' section, the 'Format' dropdown is set to 'PDF Document'. In the 'Email Options' section, the 'Attachment Options' dropdown is set to 'Attach to draft email message'. The 'Subject' text box contains 'Invitation to Bid'.

Email without Attachment

If you are sending only an email with no attachment, the body of the form letter is put into the email. Select the **Email Message** as the format in the **Output** section, then select the **Email Options** as desired. Select **Next**.

Output

Format: Email Message

Email Options

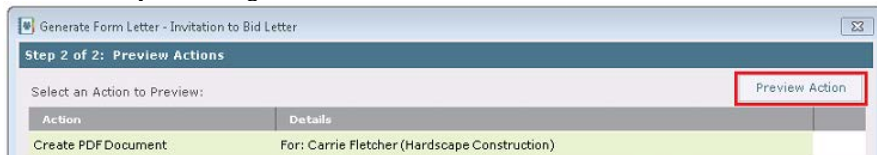
Email Method: Create draft email message

Subject: Invitation to Bid

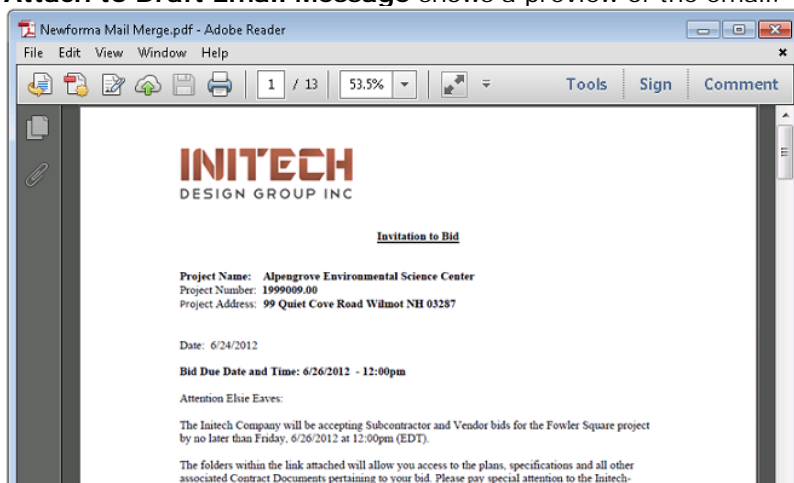
CC:

Recommendation: Select **Create Draft Email Message** if you want to see the email before sending. Selecting **Send Email Message** will not allow you to edit the email before it is sent.

4. On the **Step 2** dialog select one of the actions then select **Preview Action** to see a preview.



5. For example, selecting **Create PDF Document** shows a preview of the PDF document as shown below. Selecting **Attach to Draft Email Message** shows a preview of the email.



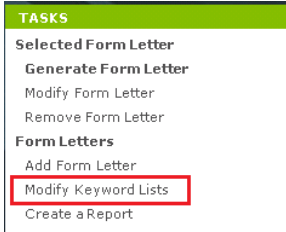
6. Select **Finish** to finish the process. If Word documents or PDFs are created, they appear before you decide to print and/or save. If you chose to generate draft emails (recommended), they are created and you can edit before sending each one.

Important: If you choose **Send Email Message** or **Attach and Send Email** from the **Email Options**, for each email created you will need to select **Confirm Send** and also select **Allow** when the Microsoft Outlook dialog appears asking you to confirm that you want to send each email message.

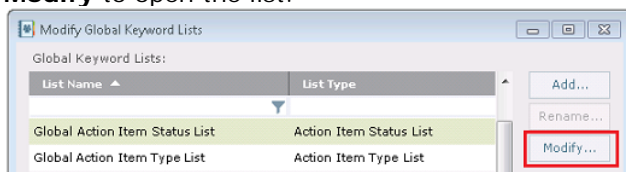
To modify keyword lists

If you have a Content Administrator's permissions you can also modify keyword lists from the Newforma Contacts Directory.

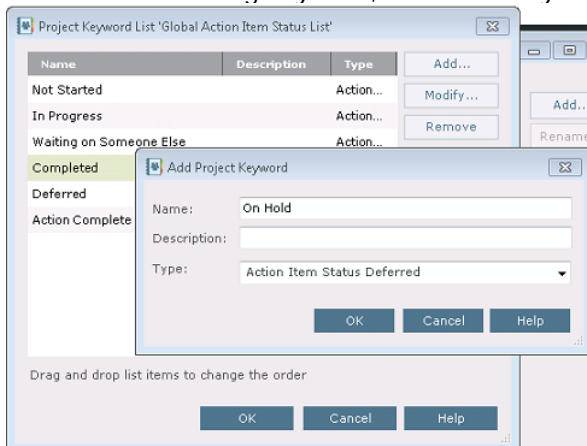
1. Select the **Form Letters** tab and select **Modify Keyword Lists** from the **Tasks** panel.



2. In the **Modify Global Keyword Lists dialog box**, select the global keyword list you want to edit and select **Modify** to open the list.



3. In the **Project Keyword List dialog box**, select **Add** to add new keywords. Enter a **Name**, **Description**, and other information in the **Add a Project Keyword dialog box** as needed and select **OK**. Click and drag list items to reorder, or sort by clicking on a column heading if desired. Select **OK** when done.
4. To modify an existing keyword, select the keyword and then select **Modify**. Select **OK** in the **Modify Project Keyword dialog box** when done.
5. To delete an existing keyword, select the keyword and then select **Remove**. Select **OK** when done.



6. When you are done modifying the selected keyword list, select **OK** in the **Modify Global Keyword Lists dialog box** to exit.