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### Market Quest®

The Best Marketing & CRM Software

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Market Quest Setup

The information in this section describes the installation and setup procedures for Market Quest. If you encounter any problems, Technical Support is available Monday through Friday, 8am to 5pm Pacific Time. Call (800) 708-9715 or fax a description of the problem to (858) 225-3515. You can also visit www.emarketfocus.com technical support page to access the Internet Help Desk.

System Requirements

- CPU Requirements:
  Desktop PCs: Pentium 4, 2.0Ghz or higher CPU, or AMD Athlon/Sempron equivalent. Laptops & Notebooks: Pentium M CPU or higher.
  50 megabytes of hard disk space for program installation.
  512 megabytes of RAM or higher
- Laser printer (ink jet printers are not recommended for campaign mail merge print jobs)
- Color or monochrome monitor
- Microsoft Word 2003 or higher
- Microsoft Outlook 2003 or higher for the Interface module
- WinfaxPro 10.03 or higher if you want to fax letters through Market Quest
- Internet Service Provider that provides SMTP e-mail compatibility to e-mail letters through Market Quest

The requirements listed above are minimum specifications. Market Quest may run on computers that do not meet these requirements. As the machine specifications lower from the requirements above, program performance degrades and some features may not work properly. Market Focus technical support is limited to servicing computers that meet the requirements above. If your machine does not meet these requirements, and you plan to use it primarily for Market Quest, please upgrade the computer accordingly.
Installation and Setup Procedures

Installing Market Quest from CD

1. Close all programs currently running.
2. Insert the Market Quest installation CD into your computer.
3.

   **Note:** After a few moments, the Market Quest installation screen should appear. If it does not appear, open the My Computer icon and open the icon for the Market Quest CD. Double click the Setup file.

   1. Click Next.
   2. Click Finish.

Registering Market Quest Single Version

Perform the following steps to start and register the Market Quest Single version:

**Step 1 – Start Market Quest**

   Double click the Market Quest icon to start it.

**Step 2 – Accept License Agreements**

   Read the license agreement and click OK to accept.

**Step 3 – Fill Out Registration Screen**

   1. Enter your first and last name into the registration screen. Make sure it is spelled correctly and has the correct punctuation because this is the way it will be written in letters.
   2. Enter the remaining information and click OK.

**Step 4 – Register Market Quest or Run in Trial Mode**
1. When you purchase Market Quest, Market Focus will email you a password and set up your account. If you have access to the Internet, click Register.

2. To enter a password, click Start in Trial Mode. Then select File \ Administration \ Register Program using Passwords. Enter the password e-mailed to you by Market Focus.

3. If you have problems, contact Market Focus for assistance. In the meantime, click Run in Trial Mode and begin using Market Quest until the problem is resolved.

4. If you are evaluating Market Quest, click Start in Trial Mode. This enables you to use the program for 30 days. At the end of the trial period, you will no longer be able to use Market Quest until you purchase and register the program. The trial is also limited to 30 records.

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**Market Quest Network Version Installation**

Market Quest has two networked versions. The Team version allows one sales rep and any number of assistants access to the program. The Multi-User Enterprise version is for multiple sales reps and assistants to access the program. Both network versions consist of a Client component and a Data Server component. The Data Server component allows multi-user access. The Client component is installed on workstation computers that access the Data Server component across the network.

The Team and Enterprise Network installation is documented in a separate user guide called Network Installation and User Guide.

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**Market Quest E-Mail Setup**

There are two different ways you can send e-mail to your clients and prospects. You can send e-mail directly from Market Quest using your SMTP mail server. Or Market Quest can send e-mail through Outlook. The easiest setup is to use Outlook for sending Market Quest e-mail.

**To use Outlook to send Market Quest e-mail:**

1. Start Market Quest.
2. Select Tools / Options and click the E-Mail Setup tab.
3. Check Send E-Mail to Outlook.
To send e-mail directly through Market Quest:

In order to send e-mail through Market Quest, you must have an Internet Service Provider (ISP) that provides SMTP e-mail capability. If you can e-mail through Outlook, you have an SMTP mail server and can e-mail through Market Quest.

E-mail setup requires 2 pieces of information:

- Your e-mail address
- SMTP Outgoing Mail Server
- If your mail server requires authentication, you will need your log on user name and password.

Your SMTP information is located in the Microsoft Outlook account information. If you use Microsoft Exchange, you need to contact your system administrator to get the SMTP mail server information.

Perform the following steps to find the SMTP information. These steps are for Outlook 2002 and will vary depending on your version of Outlook. If you need help, contact Market Focus technical support.

1. Start Outlook.
2. Select Tools / E-mail Accounts.
3. Select “View or change existing e-mail accounts” and click Next.
4. Select your default e-mail account and click Change.
5. Write down the information in the Outgoing Mail Server (SMTP) field.
6. If Log on using Secure Password Authentication (SPA) is marked, write down your User Name and Password. If you don’t know your password, contact your ISP or system administrator for this information.
7. Click Cancel to close Outlook.

8. Start Market Quest.
9. Select Tools / Options and the E-mail Setup tab.
10. Enter your e-mail address.

11. **Note:** If you are using the Multi-User Enterprise system, you must enter e-mail addresses for all registered users. After completing the e-mail setup, click the User Registration icon to enter multiple e-mail addresses.

12. Enter the SMTP Mail Server information

13. Leave the Port Number at 25, unless you know the mail server requires a different number.

14. If the e-mail service, such as Yahoo or Gmail, require SSL, check Use SSL E-Mail Server.

15. If your mail server requires authentication, mark the Mail Server Requires Authentication checkbox.

16. Enter your username and password

17. Select the Authentication mode. The most common mode is AUTH LOGIN. If the e-mail test fails, try the CRAM-MD5 mode.

18. Click Send Test E-Mail to send a test e-mail to Market Focus technical support. If the e-mail test fails, please consult your ISP to make sure you entered the correct information. **Note:** *Software firewalls such as Norton, McAfee, and ZoneAlarm will block Market Quest from sending e-mail.* You’ll need to configure these programs to allow Market Quest access to the Internet (specifically TCP Port 25). If you are unsure how to do this, consult the help system for the firewall program or contact technical support for the firewall program. If you still have problems after verifying the ISP information and configuring software firewalls, contact Market Focus technical support for further troubleshooting.

19. The Log E-mail Events is used to diagnose problems between the SMTP mail server and Market Quest. Leave it unmarked unless you have problems.
20. Please consult the section called E-Mail Options for a description of the other e-options shown.

Reinstalling Market Quest

Use the following steps to reinstall the program. This will not erase information in your database.

1. Open the My Computer icon.
2. Open Control Panel.
3. Open Add/Remove Programs.
4. Find Market Quest in the list and select it.
   
   Note: If Market Quest is not on the list, reinstall the program using the installation CD or from the Internet.
5. Click the Change/Remove or Add/Remove button, depending on your version of Windows.
6. Click Next.
7. Click Finish.

Reinstalling Market Quest Marketing Letters

If you have previously installed letters via the Internet, follow this procedure. If you installed letters manually, follow the procedure described earlier in this section, Installing Market Quest Marketing Letters.

1. Select File / Administration / Install Marketing Letters / Reinstall Extra Marketing Campaigns from the Internet.
2. You also can select Reinstall Basic Letters and E-Mail to install the 82 standard letters and e-mail.

Uninstalling Market Quest

Uninstalling Market Quest removes the program and all user data. However, previous back ups are not removed. To prevent data loss, make a back up of your data, letters and any graphic files before uninstalling.

1. Open the My Computer icon.
2. Open Control Panel.
3. Open Add/Remove Programs.
4. Find Market Quest 32 in the list and select it.
5. Click the Change/Remove or Add/Remove button.
6. Select the Remove option.
7. Click Next.
8. Click Finish.
Contacting Technical Support

Our goal at Market Focus is to provide our customers with the highest quality support to answer questions and resolve problems. Ours is not a “one size fits all” approach to support. Instead, we have developed a variety of services that respond to the diverse requirements of our customers. Our tiered support and upgrade plans provide you with the maximum flexibility based on your particular business needs.

For more information on Technical Support policies, please visit www.emarketfocus.com/support and download our manual.

Hours of Operation

Market Quest Technical Support is available Monday through Friday, from 8 am to 5 pm, Pacific Standard Time.

Contacting Technical Support

You can contact Technical Support using following methods:

Telephone: 800-708-9715 x3
Fax: 858-225-3515
Internet: www.emarketfocus.com/support to access the Internet Help Desk.

Support Services

Market Focus, Inc. uses the latest Internet technology to provide you with many support services, including:

- Market Quest Knowledge Base – Central repository for articles on helpful tips, answers to “how to” questions, solving problems and other useful information.
- Market Quest Help Desk – Customers can submit support requests and track their status through individual accounts.
- Market Quest Update Service – Program updates and new features are downloaded automatically from Market Quest.
- Market Quest Online Training – Learn how to use Market Quest’s basic features via the Internet. The training is divided into topic areas.
Market Quest Overview

Contact Management

Market Quest contains two databases that allow you to store key information about your current and potential clients. The Customers database includes information on past and prospective customers. The Contacts database contains all non-customers such as family, friends and other people who may refer customers to you.

There are many features available for using information in the Contacts and Customers databases. These features help you manage your ongoing business as well as keep track of your prospects and people referring business to you.

Lead Management

Market Quest provides lead management tools to help you track and manage leads more effectively. You can track various sales activities to help you manage your prospect pipeline. This allows you to know where prospects are in the sales cycle and which activities increase your close rate. For example, you can track how much time you spend with prospects and other marketing activities, such as letters and email sent, the number of calls, appointments, tasks, interviews, and applications taken over a certain time period. A forecasting tool allows you to predict your pipeline as you work with your prospects. Market Quest also contains lead management reports to help you analyze your sales statistics.

Marketing Campaign Management

Market Quest has an excellent feature for creating and managing marketing campaigns for any purpose. For example, you can create a drip campaign to stay in contact with your prospects or with past customers. Market Focus has created many marketing campaign letters and email to target specific market segments. There are letters and e-mail designed for the mortgage, real estate and insurance industries.

Database Marketing

The key to any database marketing program is its ability to find people most likely to do repeat business with you. Market Quest has easy-to-use tools to search for these customers. For example, you can find all past customers who purchased a specific product or service a year ago.
**Relationship Marketing**

Market Quest utilizes a proven marketing strategy for generating exceptional sales results. You can create relationship marketing campaigns for any purpose, such as sending letters periodically to any referral source.

You can also send special interest letters or e-mail to your clients and business partners. For example, you can send golfing tips to your clients who are golfers. This takes relationship marketing to a more personal level.

Market Quest tracks all letters sent so that you can determine who is receiving letters and the success of your marketing campaigns.

**Monitoring Events**

The Event Monitor reminds you of important events every time you start Market Quest. The following events are monitored:

- Letters and e-mail due to print or send
- Birthdays, including spouses and children
- Anniversaries
- Custom actions
- Custom events expired

**Microsoft Outlook Interface Module**

The Market Quest Outlook interface module provides capabilities to share information between Market Quest and Microsoft Outlook 2003 and higher.

Market Quest provides the following integration features:

- Data is synchronized between Market Quest and Outlook Contacts folder
- You can create and edit linked tasks and appointments from Market Quest. You can also assign other people to the tasks created in Market Quest and e-mail it to them.
- Linked tasks and appointments are displayed in Market Quest
- Information added or modified in Market Quest is transferred automatically to Outlook
- Create a standard series of tasks with the Activity Manager for workflow management.
- Create birthday events in Outlook.
- View all Outlook appointments and tasks from Market Quest.
- Use the Outlook e-mail editor to send temporary e-mail through Market Quest.
- Read Outlook Inbox and Sent folders to create an e-mail history for customers and contacts.
E-mail Market Module

The E-mail Marketing Module is an add-on that allows you to e-mail Market Quest letters. Market Quest sends e-mail directly through your Outgoing SMTP mail server. All e-mail is sent in graphical HTML format. E-mail letters are created with Microsoft Word and Market Quest controls when they are sent. A broadcast e-mail feature allows you to send graphical HTML newsletters to a group of people easily without using Word.

Microsoft Word

Market Quest is designed to work easily with Microsoft Word 2003 and higher. Whenever you create, edit or print Market Quest letters, you must do so through Market Quest. Market Quest controls Word to perform these functions easily. You don’t have to know how to perform mail merges with Market Quest because it is automatic when you print letters. Everything is preset to work automatically.

Market Quest Systems

Market Quest has three systems to meet different marketing and operational needs.

• Professional System – designed for laptop and desktop computers for one sales agent.

• Team System – a professional system that can be connected to a network. Ideal for one sales rep and multiple assistants who want to access a common database.

• Enterprise System – a multi-user version program that can be installed on a network or on one computer for company-wide marketing for an entire group.

• Internet WebDesk – designed to provide access to Market Quest, Microsoft Office and Outlook via the Internet. The WebDesk system is available in all three system configurations.

Market Quest Services

Market Quest services provide extra features on a cost per use or monthly basis. Market Quest is integrated with these services so they are easy to access and use. The following services are integrated with or provided by Market Quest.

• Letter printing and mailing service from Eye Comm, Inc.
Managing Customers & Contacts

Customers Database Overview

The Customers database contains your prospect and past customer information.

- **Customers** – general information, names, addresses, telephone numbers and status.
- **Notes** – general notes about the customer.
- **Outlook Activities** – When the Outlook interface module is enabled, the Activities screen shows all Outlook appointments and tasks from within Market Quest.
- **Marketing** – marketing and lead information, such as customer goals, desired interest rate, referral lead and referral source.
- **Personal Info** – demographic information, such as employment, marital status, income, debts, birthdays and anniversaries.
- **Interests** – indicates special interests, which can be used to send special interest letters.
- **Custom** – contains fields that you define to contain any information.
- **Records List** – Shows a list of customers on the left side of the screen. Double click on a person and Market Quest displays the record.

To select the Customers database, click .

Customer Main Screen

The Customer screen contains general fields such as names, addresses and telephone numbers.
Personal Title
Click the list preceding the first name field and highlight the desired title, if any.

Names
First names are spell-checked automatically, and are compared with personal titles to make sure they match. For example, if you select “Mr.” and the first name is “Nancy,” a message appears indicating that the title is male and the first name is female.

After entering the Customer’s last name, press F2 to copy the last name to the co-Customer’s last name field.

Greeting
The Greeting field is used as the salutation in letters to Customers. Greetings can be formal or informal. For example, “Dear Mr. Smith” is a formal greeting; “Dear Robert” is an informal greeting. The type of salutation is determined by the style you select. Select Tools/Options and the Printing tab to set this option. The greeting field is created automatically when you save the record or when you click the Greeting button. You may also type in a different greeting if you prefer.

Create Date
Market Quest automatically enters the date the Customer record was created. This date is important because it is used to select records by various reports.

Addresses
Enter the mailing address. All letters are sent to the mailing address. When you enter a zip code and the Automatic Zip code feature is enabled, the city and state information is automatically entered. If the zip code is not in the database, you can add the zip code to the list.

You can also enter zip codes into the zip code database through the Modify Lists feature. Select Tools / Modify Lists and customer or contact lists.

Phone Numbers
Enter the phone numbers for the customer
Best Time
Select the best time of day to contact this person.

Best Way to Communicate
The checkboxes next to the various phone numbers indicate the best way to contact this person. For example, mark the Home checkbox if this person prefers to be contacted at home.

E-mail Addresses
Enter the E-mail address for the customer and co-customer.

E-Mail
Click E-Mail to create a temporary e-mail message.

Owner
This is the registered owner of Market Quest.

Status
Select the appropriate descriptor from the Status List:

- **Client**: The customer is currently doing business with you or is a past customer.
- **Prospect**: The customer is a potential client

To create additional Status types, select a blank status from the list. Then type the new status value and press Tab. You can also add values by selecting Tools \ Modify Lists \ Customer Lists and then select Status.

Sales Stage
Select the sales stage that represents where the customer is in the sales cycle.

Pipeline
The pipeline field used to categorize clients and prospects. You can add pipeline values.

- **Prospect**
- **Invoiced**
- **Sale**
- **Sale in Process**
- **Withdrawn**
- **Return**

Priority
Select the priority for this customer. Priority can be set to High, Medium or Low depending on the level of interest.

Mail Status
The Mail Status field allows you to choose whether or not a person will receive letters. If you want a person to receive letters, select Send Letters. If you do not want a person to receive any letters, select Don’t Send Letters.

Title
The customer’s title.

Group
Classify customers and prospects with the group field. This allows you find people who belong to a specific group for look up or for special marketing campaigns. You can add group values to this field.

**Account**

The account field is used to further group customers and prospects. For example, you can group customers and prospects by business name and use this for look up or for marketing campaigns.

**Lead Source**

Contains the source of the lead. To add an item to the list of sources, enter the new source name and press Enter.

**Referral Type**

This field classifies the customer based on how much business he or she gives you. Possible classifications include customer, client, or advocate. You may also add other classifications.

**Referred By**

Contains the name of the person who referred the customer to you. Click Add Referral to assign a customer or contact as the referring person. You cannot enter the name of the person into this field.

**Referred To**

Contains the name of a contact to which you referred this customer. For example, you might refer a customer to a financial planner or a life insurance representative and you want to record this fact. Click Add Referred To to assign the person. You can’t enter the person’s name into this field.

**Referrals**

Contains the total number of referrals the customer has given you. This number is updated automatically when you assign customers as the referral sources. It can't be modified.

**Last Campaign and Date**

Contains the name and date of the last marketing campaign completed. You can search this field.

**Customer Lists**

You can display 4 customer lists along the left side of the main screen. The lists provide easy access to many features, such as drag and drop.

**To show and hide lists:**
1. Select View / Lists and select the list to show or hide, such as the Record, Campaign, Letters, and Activity lists.
2. Press F8 to show or hide the campaigns, letters, or activity lists.
3. Press F9 to show or hide the records list.

**Customer Record List**

The customer record list shows a list of all customers in the database. Customers’ names are color coded to indicate various conditions:

- **Blue** – The customer is in a campaign or an activity.
- **Grey** – The customer’s mail status is set to Don’t Send Letters.
- **White** – The customer is not in a campaign or activity and the mail status is set to Send Letters.

**Note:** If a customer is in an activity and the mail status is set to Don’t Send Letters, the name will appear in blue.

The customers list has the following features:

- **Search** – Click in the customer list and begin typing the last name of the customer. When the name is found in the list, double click on the name or press the Enter key to display the customer record.
- **Right Mouse Click** – Right mouse click on customer to view the campaigns or activity the person is in.
- **Double Click** – Double click a customer to go to that person’s database record.
- **Drag and Drop** – You can drag a customer from the list and drop it on other lists to perform various actions. Click the left mouse button on a customer in the list and hold it down while moving the mouse over an item in another list (e.g., campaigns list). Let go of the mouse button to drop the customer on the item desired.
  - **Campaigns List** – Add the customer to a campaign.
  - **Letters and E-mail List** – Send the person a letter or e-mail.
  - **Activity** – Add the customer to an activity.

**Campaigns, Letters and Activities Lists**

The lists show campaigns, letters and e-mail, and activities series for customers only. Double click on an item to edit it. You can selectively show one or more of the lists.
Notes Screen

The notes screen allows you to enter unlimited notes for the customer, such as conversations. This screen also contains areas for displaying linked appointments and tasks items.

The following features are provided for entering notes:

- **Set Time** – Timestamps the note.
- **Clear** – Clears the entire note.
- **Print** – Prints the notes.
- **Note List** – Select commonly used notes from the list and it will be entered into the note. To add a note to the list, click in the list, enter a new note and press Enter.
- **New (Outlook only)** – Create a linked appointment or task. The Outlook appointment or task is created and linked to the person displayed.
- **Edit (Outlook only)** – Display the appointment or task selected. You can modify appointment and task information.
- **Delete (Outlook only)** – Delete an Outlook appointment or task.
- **List (Outlook only)** – Display all appointments and tasks in a larger list.
Outlook Activities Screen

The Outlook Activities screen shows all Outlook appointments and tasks from within Market Quest. You can add, edit and delete Outlook appointments and tasks from this screen. You can also change the view to display appointments for a certain time period and tasks based on the task status.

**Outlook Activities Features**

- **Maximize/Minimize Screen** – Click “+” to maximize the appointments or tasks list. Click “-” to minimize the list.
- **Double Click (To Edit)** – Double click on an appointment or task to display an edit screen. Changes are saved in Outlook.
- **Change Sort Order** – Click on a column title (e.g., Category) to change the sort order for displaying appointments and tasks.
- **Right Mouse (To Display Menu)** – Click the right mouse button on the appointments or tasks list and a menu displays so you can create, edit, or delete an item. If you linked an appointment or task to a customer or contact record, select Go To Linked Record to display the person’s record.
- **Drag and Drop (To Add)** – When the Customer or Contact Records list is displayed, you can select a person from the list and drag them to the appointments or tasks list to create a linked item. Hold the left mouse button down on a person’s name and move the mouse directly over the appointments or tasks list, and then release the mouse button.
- **Complete Tasks** – To mark a task completed, click the checkbox next to the task item. The item in Outlook will also be marked complete.
- **Appointment View** – Select a time period (Today, or next 7 days, etc) from the Appointment View list. The appointment start date is used to select appointments to view.
• **Task View** – The task status is used to change the list of tasks displayed. You can also select Overdue tasks, which is based on the task’s due date.

**Personal Info Screen**

The Personal Info screen contains demographic information, such as birthdays and anniversaries for the customer and co-customer.

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### Fields

- **Anniversary** - Enter the day, month and **current** year to be reminded when the anniversary expires
- **Birthday** – Date of birth.
- **Spouse B-Day** – Spouse’s date of birth.
- **Ages** – Current ages of customer and spouse
- **Marital Status** – Marital status
- **Other Phones** – Alternate phone number and e-mail for the spouse
- **Spouse** – Use this field for the spouse’s name. You can also use the field under the main customer screen for the spouse.
- **Occupation** – Spouse’s occupation
- **Employer** – Spouse’s employer
- **Children’s Birthdays** – Enter the first names only and each child’s date of birth.
Interests Screen

The Interests screen contains various boxes to record the interests of the customer and co-customer. Market Focus has written special interest letters that you can send to both customers and contacts. For example, you can send golf letters to people interested in golf. If these letters are installed and you mark the Golf box, you can add the customer to a golf campaign.

You can add interests by clicking to the right of an empty checkbox and entering a name. You can also rename interests by clicking on the name and changing the text. However, if you plan to purchase interest letters from Market Focus, don’t rename any of the interests for which you purchase letters. The automatic add feature uses the interest names as they are defined.

Custom Screen

The Custom screen contains fields that you define to capture information about the customer or co-customer. You can capture any type of information, such as dates, and numbers. Any custom field you define can be searched for reports, adding people to campaigns and creating groups.
Market Quest allows you to define three types of fields:

- **General Fields** - Contain general information.
- **Merge Fields** - Contain general information that can be merged into letters.
- **Monitor Fields** - Special date fields that are tracked by the Event Monitor. When a monitor field contains a date that is equal to or earlier than the current date, the Event Monitor notifies you.

To define a field, click to the left of the list and enter the name of the field. You can rename fields by clicking on the name and changing the text.

The General and Merge fields are lists so it is easy to select repeated information. For example, you could define a field called Prequalified and add items named Yes and No. To add an item, enter the information into a blank field and press Enter. To remove an item from the list, double click on the item.

**Contacts Database Overview**

The Contacts database contains information about your non-customers, such as Realtors, builders, escrow agents, attorneys, etc. You may also enter personal contacts and other people you do business with.

You cannot create databases for different types of contacts. For example, you cannot create a separate database just for Realtors. Market Quest has a group field that allows you to group your contacts. The groups can be used to select people for marketing campaigns, viewing and reports.

The Contacts database has many of the same features as described in the Customers database section.

- **Contact** – general information, names, addresses and telephone numbers and status.
- **Personal Info** – demographic information, such as marital status, birthdays and anniversaries and spouse information.
- **Notes** – general notes about the contact.
- **Outlook Activities** – When the Outlook interface module is enabled, the Outlook Activities screen shows all Outlook appointments and tasks from within Market Quest.

- **Interests** – indicates special interests, which can be used to send special interest letters.

- **Custom** – contains fields that you define to contain any information.

### To select the Contacts database:

Click the Contacts icon.

### Contact Main Screen

![Contact Main Screen](image)

#### Personal Title

Click the list preceding the first name field and highlight the desired title, if any.

#### Names

First names are spell-checked automatically, and are compared with personal titles to make sure they match. For example, if you select “Mr.” and the first name is “Nancy,” a message appears indicating that the title is male and the first name is female.

#### Greeting

The Greeting field is used as the salutation in letters to Contacts. Greetings can be formal or informal. For example, “Dear Mr. Smith” is a formal greeting; “Dear Robert” is an informal greeting. The type of salutation is determined by the style you select. Select Tools/Options and the General tab to set this option. The greeting field is created automatically when you save the record or when you click the Greeting button. You may also type in a different greeting if you prefer.

#### Company Name

As you enter the company name, Market Quest searches for existing companies and will add the address information as you type. To select the company displayed, press Tab or Enter. When there are
no matching companies, the address fields will be blanked. Continue typing the company name and press Tab or Enter when completed. The company information will be added to the list when you enter and save the address information.

To turn off this feature, select Tools / Options and click General. Unmark the Search Company Name box.

**Addresses**

All letters are sent to the mailing address. If you want to send letters to the home address, enter the information and mark the box named Mail to Home Address.

When you enter a zip code and the Automatic Zip code feature is enabled, the city and state information is automatically entered. If the zip code is not in the database, you can add the zip code to the list.

You can also enter zip codes into the zip code database through the Modify Lists. Select Tools / Modify Lists.

**Phone Numbers**

Enter the phone numbers.

**Best Time**

Select the best time of day to contact this person.

**Best Way to Communicate**

The checkboxes next to the phone numbers indicate the best way to contact this person. For example, mark the Home checkbox if this person prefers to be contacted at home.

**E-Mail**

Click E-Mail to create a temporary e-mail message.

**Owner**

This is the registered owner of Market Quest. This list will contain multiple names for the Enterprise system.

**Status**

Select the appropriate descriptor from the Status List:

- **Client**: The Contact has a business relationship with you or is in a related parties group.
- **Prospect**: The Contact is a potential client.

To create additional Status types, select a blank status from the list. Then type the new status value and press Enter.

**Sales Stage**

Select the sales stage the contact is in the sales cycle.

**Priority**

Select the priority for this contact. Priority can be set to High, Medium or Low.

**Mail Status**

The Mail Status field allows you to choose whether or not a person will receive letters. If you want a person to receive letters, select Send Letters. If you do not want a person to receive any letters, select Don’t Send Letters.

**Title**
Select the appropriate title from the list, such as President, Manager, etc. To add additional titles, select a blank title, enter the text and press Enter.

**Group**

Select the appropriate group from the list to categorize this contact. Groups are used for adding people to campaigns, viewing and creating reports. To add additional groups, select a blank group, enter the text and press Enter.

**E-mail Address**

Enter the E-mail address for the contact. Click Send to create a temporary e-mail message.

**Website Address**

Enter the website address for this contact. Clicking Visit starts Microsoft Explorer and visits the web page.

**Home Address**

Enter the contact's home address. Click Mail to Home Address and this address is used as the mailing address.

**Referral Type**

The type of referral partner this contact is.

**Referrals**

The number of referrals this contact has given you.

**Assignments**

Contacts can be assigned to customers to create a related parties grouping. This field shows the number of customers this contact is assigned to.

**Last Campaign**

This field shows the name of the last campaign completed for this contact.

**Create Date**

Market Quest automatically enters the date the Contact record was created. This date is important because it is used to select records by various reports.

**Contact Lists**
You can display 4 contacts lists along the left side of the main screen. The lists provide easy access to many features, such as drag and drop.

**To show and hide lists:**

1. Select View / Lists and select the list to show or hide, such as the Record, Campaign, Letters, and Activity Series lists.
2. Press F8 to show or hide the campaigns, letters, or activity series lists
3. Press F9 to show or hide the records list.

**Contact Record List**
The contact record list shows a list of all contacts in the database. Contacts names are color coded to indicate various conditions:

- **Blue** – The contact is in a campaign or an activity series.
- **Grey** – The contact’s mail status is set to Don’t Send Letters.
- **White** – The contact is not in a campaign or activity series and the mail status is set to Send Letters.

The contacts list has the following features:

- **Search** – Click in the contacts list and begin typing the last name of the contact. When the name is found in the list, double click on the name or press the Enter key to display the contact record.

- **Right Mouse Click** – Right mouse click on contact to view the campaigns or activity series the person is in.

- **Double Click** – Double click a contact to go to that person’s database record.

- **Drag and Drop** – You can drag a contact from the list and drop it on other lists to perform various actions. Click the left mouse button on a contact in the list and hold it down while moving the mouse over an item in another list (e.g., campaigns list). Let go of the mouse button to drop the contact on the item desired.
  - **Campaigns List** – Add the contact to a campaign.
  - **Letters and E-mail List** – Send the person a letter or e-mail.
  - **Activity Series** – Add the contact to an activity series.

**Campaigns, Letters and Activities Lists**
The lists show campaigns, letters and e-mail, and activities series for contacts only. Double click on an item to edit it. You can selectively show one or more of the lists.

**Personal Info Screen**
The Personal Info screen contains demographic information, such as birthdays and anniversaries for the contact and spouse.
Fields

- **Anniversary** – Enter the day, month and current year to be reminded when the anniversary expires.
- **Marital Status** – Marital status of primary customer.
- **School** – Where the contact attended school.
- **Years Exp.** – Number of years in this profession.
- **Hobbies** – General hobbies. This field is used for compatibility with older versions of Market Quest. See Interests screen.
- **Sports** – General sports. This field is used for compatibility with older versions of Market Quest. See Interests screen.
- **Asst. First** – Assistant’s first name.
- **Asst. Last** – Assistant’s last name.
- **Birthdays** – Enter the date of birth.
- **Ages** – Current ages of contact and spouse. This field is calculated automatically when the birthday is entered.
- **Other Phones** – Enter alternate phones or the spouse’s phone information.
- **E-Mail Address** – Enter alternate or spouse’s email address. Clicking Send creates a temporary e-mail message.
- **Spouse** – Name of the spouse.
- **Occupation** – Spouse’s occupation.
- **Employer** – Spouse’s employer.
- **Children’s Birthdays** – Enter the first names only and enter each child’s date of birth.

Notes Screen

The notes screen allows you to enter unlimited notes for the contact, such as conversations.
This screen also contains areas for displaying linked appointments and tasks items.

The following features are provided for entering notes:

- **Set Time** – Timestamps the note.
- **Clear** – Clears the entire note.
- **Print** – Prints the notes.
- **Note List** – Select commonly used notes from the list and it will be entered into the note. To add a note to the list, click in the list, enter a new note and press Enter.
- **New (Outlook only)** – Create a linked appointment or task. The Outlook appointment or task is created and linked to the person displayed.
- **Edit (Outlook only)** – Display the appointment or task selected. You can modify appointment and task information.
- **Delete (Outlook only)** – Delete an Outlook appointment or task.
- **List (Outlook only)** – Display all appointments and tasks in a larger list.

**Interests Screen**

The Interests screen contains various boxes to record the interests of the contact and spouse. Market Focus has written special interest letters that you can send to both customers and contacts. For example, you can send health and fitness tips to clients. If these letters are installed and you mark the Health & Fitness box, you can add the contact to the Health & Fitness campaign.

You can add interests by clicking to the right of an empty box and entering a name. You can also rename interests by clicking on the name and changing the text. However, if you plan to purchase interest letters from Market Focus, don’t rename any of the interests for which you purchase letters. The automatic add feature uses the interest names as they are defined.

**Custom Screen**

The Custom screen contains fields that you define to capture information about the contact. You can capture any type of information, such as dates, and numbers. Any custom field you define can be searched for reports, adding people to campaigns and creating groups.

Market Quest allows you to define three types of fields:

- **General Fields** - Contain general information.
- **Merge Fields** - Contain general information that can be merged into letters.
- **Monitor Fields** - Special date fields that are tracked by the Event Monitor. When a monitor field contains a date that is equal to or earlier than the current date, the Event Monitor notifies you.

To define a field, click to the left of the list and enter the name of the field. You can rename fields by clicking on the name and changing the text.

The General and Merge fields are lists so it is easy to select repeated information.
Market Quest Record Toolbar

The upper toolbar provides quick access to commonly used Market Quest features. This toolbar can be hidden or repositioned.

To hide or view the Record Toolbar:
Select View / Toolbars / Hide Record Toolbar or Show Record Toolbar.

To move the Record Toolbar:
Click on the toolbar and drag it to a new location on the screen. You can change the toolbar shape by clicking on the edge of the toolbar and dragging the corner.

To reset the Record Toolbar position:
Select View / Toolbars / Reset Toolbar. If the toolbar has been moved, you can double click on it to reset to its default position.

The following describes each toolbar feature:

- Display first record
- Display previous record
- Display next record
- Display last record
- Create new record
- Save changes to record
- Undo changes to record
- Attach files to record
- Duplicate record
- Merge Record
- Print record summary
- Delete record
- Find record
- Display records in spreadsheet view
- Display company list
- Set or clear bookmark
- Assign customer or contact to a related parties group
- Display letters and e-mail sent and received from customer or contact
Entering New Customer and Contact Records

There are several ways to create a new database record.

**New Icon**

Click the New icon. The customer or contact screen appears with blank fields.

**Duplicate Icon**

Click the Duplicate icon. The Duplicate command creates a new record with the same information as the one displayed.

**Menu**

Select Record / New from the upper menu. You can also click the right mouse button to display a short cut menu and select New.

**Creating Customers from Contact Records**

To create a customer record from an existing contact record:

1. Go to the record in the contact database.
2. Select Record / Create Customer Record.

**Creating Contacts from Customer Records**

To create a contact record from an existing customer record:

1. Go to the record in the customer database.
2. Select Record / Create Contact Record.

**Data Entry Options**

Market Quest allows you to set data entry options for your databases. Select Tools / Options and click the General Tab.

**Automatic Capitalization**

The Capitalize Names option allows you to enter information without worrying about capitalization.

When entering customer and contact last names, the auto-capitalize feature correctly capitalizes names beginning with Mc, Mac, and O’, such as McDonald, MacDonald, and O’Neal. Hyphenated last names are also capitalized correctly, such as Bentley-Smith.

When entering company names, such as ABC Realtors, the ABC is not capitalized. Market Quest will not capitalize any part of a company name that is 3 characters or less. In these cases, you need to provide the correct capitalization.

**Note:** If Market Quest doesn’t capitalize a name correctly, press Tab to leave the field and then click in the field to make changes.

**Automatic Zip Code Entry**
The Automatic Zip Code option automatically inserts the city and state information when you enter a zip code. Market Quest searches the zip code database for this information. If a zip code is not found, you can add this information into the database for future reference.

**Greeting Style**

This option allows you to choose between formal and informal greeting styles. Formal greetings use Mr. and Mrs. and the last name. Informal greetings use first names. To change this option, select Tools/Options and click the Printing tab.

**Default Transaction Type (Customers)**

When creating new customer records, the Default Transaction Type sets the transaction type field to Purchase or Refinance.

**Search Company Name**

When entering company names for contacts, Market Quest will search for matching names already entered as you type. If you type a new company name the address information is blank. When you enter the address information of the new company and click Save, this company will be added to the search list.

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**Merging Records**

If you have duplicate records, you can merge them into 1 record.

**To merge records:**

1. Click on the toolbar.
2. Click the first record to merge in the customer or contact side list.
3. Click the second record to merge in the side list and the following screen displays.

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**Features**

- **Merge** – Merges the records into 1. The direction of the merge is determined by the arrow. For example, the record on the left is merged with the record on the right. After the merge, the record on the left is deleted.
• **Switch** – Changes the direction of the merge. For example, changing the direction would merge the record on the right with the record on the left.

### Deleting Customers and Contacts

There are several ways to delete a customer or contact record.

**Delete Icon**

Click the Delete icon ✗

**Menu**

Select Record / Delete from the upper menu. You can also click the right mouse button to display a short cut menu and select Delete.

**Delete Groups of Customer or Contact Records**

This feature allows you to delete more than one record at a time. We recommend that you back up your database before deleting groups of record in case you make a mistake.

**To delete a group of records:**

1. Perform a backup of your user data. See the section on Back up and Restore for more information.
2. Create a query that selects the records to be deleted. See the section called Using Queries to Find People for information on how to create queries.
3. Go to either the customer or contact database and select Group / Set Customer Group or Set Contact Group.
4. Select the query to find records to delete.
5. Select Record / Delete / Group Delete. All records in the group will be deleted.

### Attaching Files to Customers and Contacts

Market Quest can attach any file to a customer or contact record. This helps you organize important files associated with particular clients and prospects. You can also view files from Market Quest. However, you must have the appropriate program installed on your computer in order to view files of that type. For example, to view Excel spreadsheets, you must have Microsoft Excel installed on your computer. To view PDF files, the Adobe Reader program must be installed, etc.

**To attach a file:**

1. Go to the customer or contact record.
2. Click 💼 to display the attached file screen.
3.
The attached files screen has the following options:

- **Add**: A browse screen opens for you to select a file to be attached. Browse your folders to find and then select the file. When a file is selected, it is not moved from its location. Market Quest only saves a link to the file. If you move the file to a different folder, you should remove the link and then add again.

- **Remove**: Remove an attached file link. This does not delete the file that is attached; it removes the association with this record.

- **View**: View all checked files with the appropriate program. For example, the file 2006 sales analysis spreadsheet is marked and it will be displayed in Excel.

- **Clear**: Clears all checked files.

### Creating Related Parties Groups

The Market Quest Assign feature allows you to create related parties groups of customers and contacts involved with your product, service or transaction, such as sellers, Realtors, builders, escrow agents, and attorneys. There are two ways to assign people to a related parties group. You can assign a contact by name or you can display a list of contacts and select people from the list.

### Assigning Contacts by Name to Related Parties Groups

1. Go to the customer record.
2. Select Assign / Related Parties.
3. Enter the name of the person you want to assign and click OK. You can enter the exact name or you can enter a partial name. For example, you can enter a D in the last name field to display contacts whose last name begins with D.
4. Market Quest will search the Contacts database for the person entered. If it finds the person, a message appears to confirm the assignment. If more than one person is found, highlight the person from the list and click Select.
5. If Market Quest doesn't find the person, a message asks if you want to add the contact. Click Yes and a screen appears to add the contact. Enter the desired information and click Save.

Assigning Contacts from List to Related Parties Groups

1. Click the Assign Related Parties icon or select Assign/Contact from the menu.

2. Select the contact to be assigned from the contacts list and click the Assign button or double-click the name. The selected contact is moved from the list of contacts to the list of Current Assignments.

3. Click Close when finished.

Removing Contacts from Related Parties Groups

1. Click the Assign Related Parties icon or select Assign/Contact.

2. Highlight the name of the contact in the Current Assignments list and click Remove or double-click the name. The contact is moved from the Current Assignments list to the contact’s list.

3. Click Close when finished.

Viewing Related Parties Groups

1. Go to the customer’s record.

2. Select View / Related Parties from the upper menu.

There are several reports that show multiple related parties groups. Select Reports / Customer Reports / Related Parties Report. You can also select Reports / Contact Reports / Related Parties Reports to show contacts and which groups they are in.

Tracking Referrals

One of the best ways you can increase your referral business is to formally thank people who refer customers to you. Market Quest has an easy method for thanking people and keeping track of your referrals at the same time.

Whenever you assign a referral, you can add them to a Referral Thank You campaign. Immediately, a letter becomes due to print to the person who gave you the referral.
Assigning Referral Sources

1. Go to the customer record.
2. Select the Assign / Referral Source or click the Add Referral button on the Marketing screen.
3. Enter the referring person’s first and last name and click OK.
4. Market Quest searches for the person entered. If it finds the person, a message appears to confirm the assignment.
   - If Market Quest doesn't find the person, a message asks if you want to add the person. Click Yes and a screen appears to add the person. Enter the desired information and click Save.
   - You can enter the exact name or a partial name. For example, you can enter a D in the last name field to display all people whose last name begins with D.
   - Highlight the person to assign and click Select.

Removing Referrals

1. Go to the customer record and click the Marketing tab.
2. Click Remove Referral.

Referral Fields

When you assign a referral, Market Quest updates three fields.

- **Referrals Given** - total number of referrals the customer or contact has given you. (Customers or Contacts database)
- **Referred By** - name of the person who referred the customer to you. (For Customers only)
- **Lead Source** - group of the referring person or other lead source you can define. Automatically set to the group of referring person or you can select a source from the list. (For Customers only)

View Referrals Given

This feature shows a list of all referrals a customer or contact has given you.

1. Go to the person’s record in either the Customers or Contacts database.
2. Select View / Referrals Given

A report is available which shows a list of referrals given. Select Reports / General Reports / Referrals Received.

Sending Temporary E-Mail Messages

The customer and contact main screens contain E-Mail buttons are used to create temporary e-mail messages. You can create message using Market Quest’s e-mail editor or the Microsoft Outlook default editor.

To use the Outlook editor:

2. Click Use Outlook for Temp E-mail
In order to use the Market Quest e-mail editor, you must first setup Market Quest SMTP e-mail. See the section called Market Quest E-mail Setup for more information.

1. When you click E-Mail, the following screen displays.
2. Fill in the e-mail recipients, subject and your message.
3. The signature block at the end of the email is generated from information in the register screen and email options selected. Select Tools / Options and click the email tab to change this information.
4. Click Send to send the message.
5. If desired, you can save the e-mail message in the notes.

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Using the Dashboard to Manage Customers

The Market Quest Dashboard provides many tools to help you manage your data more effectively and give you feedback on your business without having to run reports.

Click 📊 to show the dashboard. The dashboard shown below is divided into three sections.

- **Upper Section** – has controls for selecting data shown in the grid and the charts. It also has a summary for each registered sales agent.
- **Grid Section** – shows the records selected in a grid layout.
- **Chart Section** – shows three sets of charts that summarize data selected in the upper section.
Upper Section Features

The Upper Section of the dashboard has controls to select records based on specific criteria, called filters. Records can be selected by sales stage, pipeline and the date customers were created in Market Quest. When filters are applied, Market Quest selects records based on the filter values and updates the summary grid, the main grid and charts accordingly.

Filter Controls

- **Sales Stage** – Shows only customers who have this sales stage value
- **Segment** – Allows you to filter the records displayed by values in other fields.
  - **Account**
  - **Group**
  - **Pipeline**
- **Value** – Select a value for the segment you wish to filter. For example, you can select the Pipeline segment and filter by Prospect value.
- **Dates** – Shows only customers whose create dates are between the dates selected. You can select from the dates list or enter dates into the fields.
- **Show Charts** – Selects the type of charts to display.
- **User** – (Multi-Use Only) If you have the privilege to view all users’ data, you can set the filter to view only one user’s data.
- **Hide Charts** – When marked, the charts are not displayed in the dashboard. Hiding the charts increases the speed Market Quest can display the dashboard. Also, the main grid can be expanded to show more records when the charts are hidden.
- **Records** – Shows the number of records selected by the filter.
- **Apply** – Select customer records based on the data selected in the filter. For example, you can show all customers whose pipeline is set to Prospect and which were created last week.
- **Clear** – Clears the current filter in place.
- **Save** – Saves the filter criteria selected and automatically applies the filter when the dashboard is redisplayed.

**Summary Grid**

The summary grid shows a summary of the data selected by the filter. If you are using the Multi-User Enterprise system and have the privilege to view all user’s data, the summary grid will show each sales agent data selected by the filter.

The summary grid uses the pipeline field to determine the number of leads and sales. Market Quest also determines if leads are unworked. An unworked lead is where there have been no calls, tasks, appointments, e-mail or letters sent to the lead.

**Grid Section Features**

The Grid Section of the dashboard shows all customer records selected by the filter set in the Upper Section. It has the following features:

- **+ -** Click to expand the grid to show more records
- **Checkbox** – Mark the checkbox to enable various controls at the bottom of the screen, such as the Delete button
- **Scroll Bars** – Click the horizontal and vertical scroll bars to view more records.
- **Sort Data** – Click a heading title, such as Name, to sort the data in the grid.
- **Double Click** – Double click the left mouse button on a record in the grid and the full record is displayed. The dashboard is minimized at the bottom of the screen. Click the dashboard icon to maximize the dashboard.
- **Right Mouse Click** – Right mouse click on a record in the grid to display a short cut menu of common commands

The buttons at the bottom of the screen perform various actions on records selected in the grid:

- **Select All** – Marks all record checkboxes in the grid.
- **Select None** – Unmarks all record checkboxes in the grid.
- **Set Sales Stage** – Set the sales stage field to a selected value for all marked checkboxes.
- **Set Pipeline** – Set the pipeline field to a selected value for all marked checkboxes.
- **Add to Campaign** – Add all marked records to a campaign.
- **Notes** – Show the notes screen for the highlighted record in the grid. This feature only works with one record.
- **Delete** – Permanently delete all records with marked checkboxes.
- **Assign** – (Multi-User versions only) If you have the privilege to view all sales rep’s data, you can reassign records to another user.
Chart Section Features

The Chart Section of the dashboard shows charts generated from records selected by the filter applied in the Upper Section. There are three categories of charts that can be displayed: Leads, Pipeline and Production. The Show Charts list in the Upper Section determines which type of charts is displayed.

All charts can show the number of files or the total dollar amount, as specified in the Upper Section. Also, click on a chart to increase or decrease the size of the chart.

- **Lead Charts** – The Lead Charts show you where your leads are coming from and what sales stage they are in.
  - **Lead Source Chart** – Summarizes data from the Lead Source field in the Marketing tab.
  - **Lead Type Chart** – Summarizes data from the Transaction field in the main customer screen.
  - **Sales Stage** – Summarizes data from the Sales Stage field in the main customer screen.

- **Market Segments** – The Market Segment Charts show records divided into various market segments.
  - **Groups** – Summarizes data from the Group field in the main customer screen.
  - **Accounts** – Summarizes data from the Accounts field on the main customer screen.
  - **Pipeline** – Summarizes data from the Pipeline field on the main customer screen.

- **Production Charts** – The Production Charts show key performance indicators related to the applications taken, funded and by lead source.
  - **Close Ratio** – The Close Ratio is determined by values in the Pipeline field on the main customer screen. The ratio is calculated by the number of sales divided by the total leads.
  - **Close Ratio by Account** – Same as the close ratio but further segmented by account.
  - **Close Ratio (Lead Source)** – Same as the other close ratios but segmented by lead source.

Using the Dashboard to Manage Contacts

The Market Quest Dashboard provides many tools to help you manage your data more effectively and give you feedback on your business without having to run reports.

Click to show the dashboard. The dashboard shown below is divided into three sections.

- **Upper Section** – has controls for selecting records shown in the grid and the charts. It also has a summary for each registered sales rep.
- **Grid Section** – shows the records selected in a grid layout.
- **Chart Section** – shows three sets of charts that summarize data selected in the upper section.
Upper Section Features

The Upper Section of the dashboard has controls to select records based on specific criteria, called filters. Records can be selected by sales stage, group, status and the date records were created in Market Quest. When filters are applied, Market Quest selects records based on the filter values and updates the summary grid, the main grid and charts accordingly.

Filter Controls

- **Sales Stage** – Shows only contacts who have the selected sales stage value
- **Group** – Shows only contacts who have the selected group value
- **Dates** – Shows only contacts whose create dates are between the dates. You can select from the list or enter dates into the fields.
- **Status** – Shows only contacts who have the selected status value
- **User** – (Multi-user versions Only) If you have the privilege to view all users’ data, show only the selected user’s records.
- **Hide Charts** – When marked, the charts are not displayed in the dashboard. Hiding the charts increases the speed Market Quest can display the dashboard. Also, the main grid can be expanded to show more records when the charts are hidden.
- **Records** – Shows the number of records selected by the filter.
- **Apply** – Select contact records based on the data selected in the filter. For example, you can show all contacts whose group is set to Realtor and which were created last week.
- **Clear** – Clears the current filter in place.
- **Save** – Saves the filter criteria selected and automatically applies the filter when the dashboard is redisplayed.
Summary Grid

The summary grid shows a summary of the data selected by the filter. If you are using the Multi-User Enterprise system and have the privilege to view all users’ data, the summary grid will show each sales rep’s data selected by the filter.

The summary grid uses the create date field to determine the number of contacts shown.

Grid Section Features

The Grid Section of the dashboard shows all contacts records selected by the filter set in the Upper Section. It has the following features:

- **+** - Click to expand the grid to show more records
- **Checkbox** – Mark the checkbox to enable various controls at the bottom of the screen, such as the Delete button
- **Scroll Bars** – Click the horizontal and vertical scroll bars to view more records.
- **Sort Data** – Click a heading title, such as Name, to sort the data in the grid.
- **Double Click** – Double click the left mouse button on a record in the grid and the full record is displayed. The dashboard is minimized at the bottom of the screen. Click the dashboard icon to maximize the dashboard.
- **Right Mouse Click** – Right mouse click on a record in the grid to display a short cut menu of common commands

The buttons at the bottom of the screen perform various actions on records selected in the grid:

- **Select All** – Marks all checkboxes in the grid.
- **Select None** – Unmarks all checkboxes in the grid.
- **Set Sales Stage** – Set the sales stage field to a selected value for all marked checkboxes.
- **Set Group** – Set the group field to a selected value for all marked checkboxes.
- **Set Status** – Set the status field to a selected value for all marked checkboxes.
- **Add to Campaign** – Add all marked records to a campaign.
- **Notes** – Show the notes screen for the highlighted record in the grid. This feature only works with 1 record at a time.
- **Delete** – Permanently delete all records with marked checkboxes.

Chart Section Features

The Chart Section of the dashboard shows charts generated from records selected by the filter applied in the Upper Section.

Click on a chart to increase or decrease the size of the chart.

- **Group Chart** – This chart uses the group field to summarize the contact records selected by the filter.
• **Status Chart** – This chart uses the status field to summarize the contact records for the filter.

• **Sales Stage Chart** – This chart uses the sales stage field to summarize the contact records for the filter.

---

## Sorting Contacts and Customers

Select Edit / Sort to order the records in the following ways:

- **Last Name**: Alphabetical order by last name. This is the default order
- **Zip Code**: Ascending numerical order, starting with the lowest zip codes
- **City**: Alphabetical order by city
- **Status**: Alphabetical order by status field
- **Group**: Alphabetical order by group field (Contacts only)
- **Company**: Alphabetical order by company (Contacts only)

---

## Showing Duplicates

This tool looks for duplicate customer and contact records. When it finds a duplicate it marks the checkbox and puts a line through the name. The criteria for finding duplicates are to match the customer’s first and last names. When duplicates are found, the oldest record is marked based on the create date. If a name is grey, it means the Mail Status is set to Don’t Send Letters. This helps to determine which record is active.

This tool can also be used to delete multiple customer records. Mark the checkbox next to any customer you wish to delete and click Delete Selected.

Select Tools / Show Duplicates / Customers to display the screen below:
Managing Customers & Contacts Market Quest User Guide

The Show Duplicates screen has the following options:

- **Select All:** Select all records in the list
- **Select None:** Unmark all records in the list
- **Select Empty Addresses:** Mark all records that have an incomplete mailing addresses
- **Delete Selected:** Delete all marked records in the list

Using Groups to Select People to View

The Set Group feature allows you to limit the records you want to view. It uses queries to determine the type of records selected. For example, you can define a query to create a group of only customers whose status is set to client.

When a group is set, the name of the group appears at the bottom of the screen. Also the records toolbar will change to reflect the number of records in the group.

To set a Group:

1. Go to the customer or contact database.
2. Select Group / Set Contact Group or Set Customer Group.
3. Select a query from the list or create a new query to define a new group. See Creating Queries for the steps to create a query. Only records selected by the query will be visible in the group.

To clear a Group:
1. Go to the customer or contact database.
2. Select Group / Clear Contact Group or Clear Customer Group.
3. The group name is set to None and all records can be viewed.

**Viewing Letters Sent to a Customer or Contact**

You can show letters that have been sent to the customer or contact currently displayed. You can view letters sent from marketing campaigns and letters sent individually.

**To view letters:**

1. Go to the customer or contact record.
2. Click the Letters icon 📝 or select View / Letters Sent / Campaign Letters. If there is more than one campaign in the list, select the campaign to display the letters sent.
3. Select View / Letters Sent / Single Letters to display letters sent one at a time.

**Viewing Campaign Status**

Viewing Campaign Status is useful when you want to know if a customer or contact is in a campaign and the status of the campaign. You can also remove the person from a campaign.

**To view campaign status:**

1. Go to the customer or contact record.
2. Select View / Campaign Status from the upper menu. You can also right mouse click and select View Campaigns.
3. If there is more than one campaign listed, click on the campaign to change the status information.

**Finding Customers and Contacts**

Market Quest has many ways to find people quickly. You can find individuals or groups of people. You can also search contact and customer fields and find people whose data matches. A replace feature allows you to replace data found in fields.

**Record List**

Using the Customer and Contact record list is the fastest way to search for a specific person.

1. If the Record List is not displayed, Select View / Lists and select Show Record List.
2. Click in the record list and begin typing the last name of the person. Market Quest searches for the name in the list.
3. Double click on the name found or press the Enter key to go to the person’s full database record.
Look Up

The Lookup menu allows you to search for a specific person by:

- Last Name
- First Name
- E-mail address
- Phone Numbers

To look up a person:

1. Select Lookup / and lookup type.
2. Enter the appropriate information. You can enter partial data or the exact data you want to find.
3. Click OK. Market Quest searches for people who match the data entered. If more than one person is found, the Card File View displays. If only one person is found, Market Quest displays the person's full record in either the Customers or Contacts database.

Card File View

The Card File View screen is used in many of Market Quest features to display customer and contact information. The Card File View displays various groups of people in the following situations:

- **Card File View Icon** - displays customers and contacts
- **Lookup** - if more than one customer or contact is found
- **Group Lookup** - list of customers or contacts found
- **Show Contact List** - from the Customers database shows list of contacts
- **Show Customer List** - from the Contacts database shows list of customers
- **Event Monitor** - shows a list of people for various events, such as call backs, anniversaries, interest rate watch, etc.
Searching for a Name in the Card File View

1. Enter the last name in the Search Name field.

2. If all customers and contacts are displayed, the list will first contain all people whose last name begins with A. When you enter a different last name in the Search Name field, the list shows all people whose last name begins with that letter.

3. If the list doesn't show all customer and contacts, Market Quest searches only for people displayed in the list.

**Note:** The Card File View icon on the Market Quest main menu only displays a limited number of people to conserve memory. Enter the last name of the person in the Search Name field to find a specific person.

Select Button

Depending on the Market Quest feature, the Select button allows you to select a person from the list in the Card File View. Otherwise, it will be dimmed to indicate that it is unavailable. The Select button is available to select people for related parties groups or referral sources.

Go To Button

1. Highlight a person in the list and click Go To to move to the full record in the Customers or Contacts database.

2. To return to the Card File View, click the Return to Card File View button at the bottom of the screen.

Notes Button

Market Quest displays the notes window.

Reset Event Button

When you select an event from the Event Monitor (see View / Event Monitor), a list of people displays in the Card File View. Click Reset Event when you have finished with the event, such as calling someone or entering a new date.

Print Labels

Click Print Labels to print labels or envelopes to the highlighted person or for all people in the list.
Add to Campaign Button

Click Add to Campaign to add the highlighted person or the entire list of people to a campaign. A list of eligible campaigns displays. See Managing Marketing Campaigns for more information on adding people to campaigns.

Print List Button

Print the list of people displayed.

Caution: If the Card File View icon is selected to display all customers and contacts, Print List will print every person in the database.

Set Loan Status Button

When you highlight a customer and click Set Loan Status, the Loan Status screen displays. You can set information in this screen and it will be merged into status letters for the customer and all people in the related parties group.

Print Letter Button

1. Highlight a person and click Print Letter.
2. Select a letter from the list. The person's notes are updated with the time and the name of the letter sent.

Send E-mail Button

1. Highlight a person and click Send E-mail.
2. Select an e-letter from the list. The person's notes are updated with the time and the name of the letter e-mailed.

Fax Letter Button

1. Highlight a person and click Fax Letter.
2. Select a letter from the list. The person's notes are updated with the time and the name of the letter faxed.

Group Lookup

The Group Lookup allows you to find people within a specific group. You can find people in the following groups:

- Company (contacts only)
- City
- Zip Code
- Contact Title
- Contact Group
- Priority
- Status
- Referral Source
- Lead Source

To look up a group of people:

1. Select Group Lookup / and the type of group.
2. Enter the search information. You can enter partial search data or the exact data you want to find.

   **Note:** You may also click the View button to display a list of possible groups to search. Highlight the group to search and click Select.

3. Market Quest searches for people who match the group selected and displays them in the Card File View.

### Searching Database Fields

You can find people from specific data entered into their database fields. For example, you can search people who have "President" entered into the title field.

![Search Fields dialog box](image)

**To search a field:**

1. Click the Binoculars icon or select Edit / Find from the main menu.
2. Select the field to search in the Search Field list.
3. Enter the data you want to find into the Search For field. You can also specify how Market Quest finds matching records:
   - Click the Exact Match checkbox to find records that exactly matches the data entered. If the Exact Match checkbox is unmarked, you can enter partial data and Market Quest will find data that partially matches.
   - Click the Match Case checkbox to find records that have the exact capitalization. For example, Johnson doesn't match johnson. If Match Case checkbox is unmarked, capitalization is not used to find data.
4. Click Find to search for matching records. Market Quest displays the first matching record.
5. Press Enter or click Find again to find the next record. When the last record is found, Market Quest displays a message. If you press Find again, the first record displays again.

### Replacing Data

You can search database fields for specific items and replace data.

**To replace data:**

1. Click the Binoculars icon or select Edit / Find from the main menu.
2. Select the field to search and set the search method as described in searching fields.

3. Click Find.

4. Enter data into the Replace With field and click Replace. Market Quest will replace the data in the field. If the Ask First checkbox is marked, Market Quest will ask before replacing the data in the field.

5. Click Replace All to replace all items found with the data entered.

Caution: Always make a backup of your data before using Replace All. This feature cannot be undone if you make a mistake.

Viewing Data in Spreadsheet Format

The Spreadsheet View allows you to view multiple records in spreadsheet format. If you have a group set to limit the records viewed, the spreadsheet will display only those records in the group. You can view records in read-only search mode or in edit mode.

Click the Spreadsheet icon or select View / Spreadsheet / and Read Only or Edit Mode. If you click the icon, the spreadsheet will be in Read Only mode.

Read Only Mode

When you view the spreadsheet in Read Only mode, you can search for people within the list. Depending on the order, you can search for people by typing letters or numbers of the item.

- **Customers Database** – Search by last name or telephone number by typing in letter or number.
- **Contacts Database** – Search by company name, last name or telephone number.

Searching for a specific telephone number begins with the prefix, not the area code. For example, if the telephone number is (619) 536-2112, the search begins with 5.

Edit Mode

When you view data in edit mode, you can change data in any field displayed.

Caution: Be careful when changing data because there is no Undo feature and data is saved when you move to a different record.

If you edit a field that is selected from a list, for example the Status field, the new data may not display in the Status list. If this happens you need to add the item to the Status list and the data will appear.

Closing the Spreadsheet

There are three ways to close the spreadsheet screen. When you close the screen, the record highlighted will be displayed.

1. Double click or press Enter on a record.
2. Click the icon at the top upper left and select Close.
3. Click the Close box at the top right side of the screen.

Spreadsheet Manager

The Spreadsheet Manager allows you to create various views of your data in a spreadsheet format. You can set a specific view to be used as the default.
To access the Spreadsheet Manager:

4. Select View / Spreadsheet. The Manager has the following features:
   - Select - use the selected view as the default
   - View - display the selected view
   - New - create a new view
   - Edit - edit an existing view
   - Delete - delete an existing view
   - Rename - rename an existing view

To create a Spreadsheet view:

1. Select View / Spreadsheet Manager.
2. Click New.
3. Select the fields you want to view and double click or click the Select button.
4. Click Save and enter a name to describe the view.
5. If you want this view used as the default when you display the spreadsheet, highlight the view and click Select.

View List of Contacts

To view a list of contacts in the Card File View, select View / List of Contacts.

View List of Customers

To view a list of customers in the Card File View, select View / List of Customers.

View List of Companies

To view a list of companies from the Contacts database, click the Company List icon or select View / List of Companies. Market Quest selects the companies based on the company street address. If
a company doesn’t show up in the list, check to see if it has a street address. You can change company address information and use the update feature described below to change records.

**Company Information**

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inter Real Estate</td>
<td>2177 Positas CT</td>
<td>Livermore</td>
<td>CA</td>
</tr>
<tr>
<td>Keller Williams</td>
<td>Suite 100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keller Williams</td>
<td>94551</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keller Williams</td>
<td>(925) 243-6666</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keller Williams</td>
<td>( ) -</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Enter**
Inserts company information into the current Contact record.

**Update**
Updates all contact records that match the company address. This provides an easy way to correct any errors in a company address or change an address if a company moves.

**Undo**
Reverts any changes made to the company data.

**Report**
Lists the people associated with the companies in the list.

---

**Bookmarks**

Bookmarks help you to flag customer and contact records. These flags can be used in various ways, such as returning to certain records or creating action lists.

**To set a bookmark**

1. Go to the customer or contact record.
2. Click the Bookmark icon or select Bookmarks / Set from the upper menu. A bookmark icon appears in the lower right hand corner or the screen.

**To clear a bookmark**

1. Go to the desired record.
2. Click the Bookmark icon or select Bookmarks / Clear from the upper menu. The bookmark icon is removed.
3. If you want to clear all bookmarks from the database, choose Clear All from the Bookmarks menu.

**Moving Between Bookmarks**

1. Select Bookmarks / Next to move to the next record with a bookmark.

2. Select Bookmarks / Previous to move to previous record with a bookmark.

3. Select the Bookmarks / Go To and select a name to display.

**Show All Bookmarks Set**

You can display all bookmarks set for both customers and contacts in the Card File View. Select Bookmarks / Show All Bookmarks.
Using Microsoft Outlook Interface

Microsoft Outlook Interface Module Overview

The Market Quest Outlook interface module provides capabilities to share information between Market Quest and Microsoft Outlook. This section describes how information is shared between the two programs and the Activity Manager, which allows you to define a series of activities that are created automatically for workflow management.

Market Quest provides the following integration features:

- Data is synchronized between Market Quest and the Outlook Contacts folder.
- You can create and edit linked tasks and appointments from Market Quest. You can also assign these tasks to other people inside or outside your office.
- Linked tasks and appointments are displayed in Market Quest.
- You can view all Outlook tasks and appointments from within Market Quest.
- All e-mail sent and received in Outlook are linked to customer and contact records.
- Information added or modified in either Market Quest or Outlook is transferred automatically.
- Market Quest customer loan details are transferred into Outlook notes.
- You create and manage a series of activities through the Activity Manager.
- You can create rate lock events in the Outlook calendar.
- You can select which Outlook folders to use with Market Quest.
- Microsoft Exchange compatible.

To Enable/Disable Outlook Interface:

1. Start Market Quest.
2. Select Tools / Options and the Outlook tab.
3. Mark or unmark the Use Outlook checkbox. A marked box means the Outlook interface is enabled.
4. If desired, mark the Show Linked Tasks and Appts checkbox. When this feature is enabled, Market Quest shows a history of all linked tasks and appointments for the person displayed.

Synchronizing Outlook Data with Market Quest

Outlook Setup

If you plan to add records in Outlook first, you’ll need to create Outlook categories to indicate Customer and Contact records.

1. Start Outlook.
2. Click the Contacts folder and open any record.
3. At the bottom of the screen, click Categories.
4. Enter MQCustomer and click Add to List.
5. Enter MQContact and click Add to List.

Transferring Market Quest records to Outlook

When you add a record in Market Quest, an Outlook record in the Outlook Contacts folder is created if the Automatic Create option is set. If this option is not set, you must use the Record / Send To / Microsoft Outlook command to create the Outlook record manually from the Market Quest record. This is useful if you do not want all Market Quest records in Outlook.

As you make changes to the Market Quest record, these changes will be made to the linked Outlook record as well. For Market Quest Customer records, an option is available to transfer loan details into Outlook notes.

When you add a Customer record in Market Quest, an Outlook record is created with the category set to MQCustomer. When adding a Contact record in Market Quest, an Outlook record is created with the category set to MQContact.

To enable/disable the Automatic Create Option:

1. Start Market Quest.
2. Select Tools / Options and the Outlook tab.
3. Mark or unmark Automatic Create.

To enable/disable the Loan Details in Outlook Notes:

1. Start Market Quest.
2. Select Tools / Options and the Outlook tab.
3. Mark or unmark Add Loan Details to Notes.

Transferring Outlook records to Market Quest

If you add a new Contact record in Outlook, a new record will be created in Market Quest only when the Outlook category is set to either MQCustomer or MQContact.

When you change Outlook Contact records, that information is transferred to linked Market Quest records automatically. For example, if you add a note to an Outlook Contact record, the note is changed in the corresponding Market Quest record dynamically. A Market Quest option is available to enable or disable this Outlook Events feature.
It is recommended that you first synchronize your Market Quest data with Outlook before changing records directly in Outlook. Synchronizing your data ensures that Outlook records are linked correctly with Market Quest Customer and Contact records.

To enable/disable the Outlook Events feature:

1. Start Market Quest.
2. Select Tools / Options and the Outlook tab.
3. Mark or unmark Enable Events.

Synchronizing Data with Outlook

Select File / Synchronize Data / Microsoft Outlook.

If you have records in Outlook that you want created in Market Quest, set the category of each Outlook record to either MQCustomer or MQContact. Market Quest uses the category to determine if a record is a Customer or Contact. Records that don't have these values will be ignored. The category is set automatically when information is transferred from Market Quest to Outlook.

Market Quest has a utility to display all Outlook records so you can set the categories as shown below. Set the category of Outlook records to Customer, Contact or No Import as needed. You can select multiple records and set the category. Hold the CTRL key down and then click on records to highlight them. Then click Customer, Contact or Don’t Import button to set the category.

You can also sort the list by Name, Company or Category.

Mapping Outlook Folders

When you enable the Outlook interface module, Market Quest communicates with Outlook’s default contact, calendar and task folders on your local computer. However, if you created other Outlook folders or you want to use public folders on Microsoft Exchange Server, you can map these folders in Market Quest.

Note: If you do not use Outlook’s default folders, certain features may not be supported. For example, the Outlook task reminder feature is only supported in the default task folder.
To map Outlook Folders:

1. Start Market Quest.
2. Select Tools / Options and click the Outlook tab.
3. Click Map Outlook Folders and the screen below displays.
4. The left list shows registered Market Quest users. The right list shows the Outlook folders on your local machine and any public folders that are available on Exchange Server.
5. Select a user and select a Contacts, Task or Calendar folder from the Outlook folders list. Then click the appropriate button (i.e., Contacts, Tasks or Calendar) to select it.
6. Click Save when finished.

**Note:** The Reset button resets all Outlook folders to Default.

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### Managing Outlook Appointments and Tasks

The Outlook Interface allows you to create and manage appointments and tasks directly from Market Quest. This eliminates the need to repeatedly switch between the two programs.

#### Creating and Managing Outlook Appointments

There are multiple ways to create Outlook appointments from Market Quest. You can create linked and unlinked appointments. A linked appointment associates the appointment with a particular Market Quest customer or contact. This allows you to see a history of appointments from the Market Quest record. You also can view, edit or delete linked appointments from Market Quest.

When you create an unlinked appointment from Market Quest, the appointment is created in the Outlook calendar but it is not linked to any particular person. You must manage unlinked appointments from Outlook.
The Outlook Activities screen displays all linked and unlinked Outlook appointments. You can create and edit all appointments through the Outlook Activities screen. See the section on Displaying Outlook Activities for a description of how to add and edit appointments.

**To create a linked appointment with a person in Market Quest:**

1. Go to the Market Quest record.
2. Select Activities / Create Outlook Appointment / Link to Person
3. Enter the appropriate information in the screen below.
4. Click Save to create the appointment in the Outlook calendar. The appointment title and start date displays in the Market Quest record.

**Note:** You can create an appointment by right clicking the mouse button and selecting Activities / Create Outlook Appointment / Link to person. You can also click New on the person’s Notes screen.

**To edit a linked appointment:**

1. Go to the Market Quest record and click the Notes tab.
2. Select the appointment to edit from the list and click Edit
3. Market Quest reads the appointment information from Outlook and displays the screen below.
4. Make any changes needed and click Save. Market Quest updates the appointment information in Outlook.
Creating and Managing Outlook Tasks

There are multiple ways to create Outlook tasks from Market Quest. You can create linked and unlinked tasks. A linked task associates the task with a particular Market Quest Customer or Contact. This allows you to see a history of tasks from the Market Quest record. You can view, edit or delete linked tasks from Market Quest.

When you create an unlinked task from Market Quest, the task is created in the Outlook task list but it is not linked to any particular person. You manage unlinked tasks from Outlook.

Both linked and unlinked tasks can be assigned to others. This allows you to formally assign and track tasks to others inside or outside your office.

The Outlook Activities screen displays all linked and unlinked Outlook tasks. You can create and edit all tasks through the Outlook Activities screen. See the section on Displaying Outlook Activities for a description of how to add and edit tasks.

To create a linked task with a person in Market Quest:

1. Go to the Market Quest record.
2. Select Activities / Create Outlook Task / Link to Person
3. Enter the appropriate information in the screen below.
4. Click Save to create the task in the Outlook task list. The task title and due date displays in the Market Quest record.

5.  

6. **Note:** You can create a task by right clicking the mouse button and selecting Activities / Create Outlook Task / Link to person. You can also click New on the person’s Notes screen.

7.  

8. **To edit a linked task:**

1. Go to the Market Quest record and click the Notes tab.
2. Select the task to edit from the list and click Edit.
3. Market Quest reads the task information from Outlook and displays the screen below.
4. Make any changes needed and click Save. Market Quest updates the task information back to Outlook.

**To assign Outlook tasks to others:**

1. Go to the Market Quest record.
2. Select Activities / Create Outlook Task / Link to Person.
3. Fill in the Outlook task information.
4. Select the person to whom you are assigning the Outlook task. If the person is not in the Assigned To list, click List and the screen below displays. Add the person and their e-mail address.

**Note:** Where possible use the role of the person instead of the actual name. That way, if you need to make a change, you can simply change e-mail addresses of the person. If you plan to use the Activity Manager to define a series of automated activities, use the role of the person.

5. Click Save to create the Outlook task.
6. Switch to Outlook and click Send/Receive to e-mail the task. The following describes the flow information when you assign tasks to other people:

- The task is put into your Outlook Outbox and e-mailed to the person receiving the task.
- The task is created in your Outlook task list and cannot be modified by you because you assigned it to another person.
- The recipient of the task receives the e-mailed task and Accepts or Declines the task. When the person accepts the task, the task is entered into the person’s Outlook task list and an e-mail is sent back to you. When a person declines a task, you are also updated via e-mail.
- When you open the Accept or Declined e-mail message, the corresponding Outlook task is updated in your task list. The e-mail is then deleted from your Inbox when you close it. The assign status of the task is also updated.
- Outlook tasks have one of the following assigned status values:
  - **Not Delegated** – The task is assigned to you.
  - **Status Unknown** – The person assigned the task has not responded.
  - **Accepted** – The assigned person accepted the task.
  - **Declined** – The assigned person declined the task.
- As the assigned person works on your task, he or she can send you task status reports via e-mail. They use the Actions / Send Status Reports option from within Outlook to send reports back to you. When you open a Status e-mail, the corresponding task in your Outlook task list is updated and the e-mail is deleted automatically.
- When a person completes a task, a task complete e-mail is sent to you. The e-mail updates the corresponding task and the e-mail is deleted.

**Note:** This scenario assumes people assigned to tasks receive their e-mail through Outlook. If they receive e-mail through a program other than Outlook (e.g., Hotmail, Yahoo, or AOL), they will receive an e-mail message containing the task subject. However, they will not be able to accept, decline or send status back automatically. Instead, they can reply to you via e-mail and you must manually track the status of the assigned task.
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The E-mail recipient list has the following features:

- **New** – Create a new recipient entry.
- **Edit** – Change a recipient entry.
- **Delete** – Delete a recipient. You cannot delete a registered Market Quest user or a person who is assigned to an activity series. See Using the Activity Manager. In this case, you will need to reassign all activities assigned to the person you are deleting.

**Note:** Where possible, use the role of the person instead of the actual name. That way, if you need to make a change, you can simply change e-mail addresses of the person.

- **Report** – List all activities this person is assigned. Useful for deleting a recipient.

**Displaying All Outlook Activities**

All Outlook tasks and appointments can be displayed on the Outlook Activities screen. The Outlook Activities is available in both the Customers and Contacts databases and displays the exact information.

When you create tasks and appointments from Market Quest, the Outlook Activities screen is updated. If you create tasks and appointments in Outlook, you need to refresh the Outlook Activities screen in Market Quest.

To refresh the Outlook Activities screen:

1. Click 🔄 on the toolbar and mark Read Outlook Appointments and Read Outlook Tasks.
2. All Outlook tasks and appointment will be read and shown in the list based on the view options selected.
You can add, edit and delete Outlook appointments and tasks from this screen. You can also change the view to display appointments for a certain time period and tasks based on the task status.

**Outlook Activities Features**

- **Maximize/Minimize Screen** – Click “+” to maximize the appointments or tasks list. Click “-” to minimize the list.
- **Double Click (To Edit)** – Double click on an appointment or task to display an edit screen. Changes are saved in Outlook.
- **Change Sort Order** – Click on a column title (e.g., Category) to change the sort order for displaying appointments and tasks.
- **Right Mouse (To Display Menu)** – Click the right mouse button on the appointments or tasks list and a menu displays so you can create, edit, or delete an item. If you linked an appointment or task to a customer or contact record, select Go To Linked Record to display the person’s record.
- **Drag and Drop (To Add)** – When the Customer or Contact Records list is displayed, you can select a person from the list and drag them to the appointments or tasks list to create a linked item. Hold the left mouse button down on a person’s name and move the mouse directly over the appointments or tasks list, and then release the mouse button.
- **Complete Tasks** – To mark a task completed, click the checkbox next to the task item. The item in Outlook will also be marked complete.
- **Appointment View** – Select a time period (Today, or next 7 days) from the Appointment View list. The appointment start date is used to select appointments to view.
- **Task View** – The task status is used to change the list of tasks displayed. You can also select Overdue tasks, which is based on the task’s due date.
Using the Activity Manager

The Activity Manager allows you to define a series of activities that you always want to perform. For example, you can define an activity series for following up with new leads. You could also define an activity series for when a loan opens.

An activity series consists of one or more activities. There are two types of activities. The first type is to add a person to a campaign. The second type is to create an Outlook task. Keep in mind that activities define events that you want performed every time you add a person to the series.

You create and modify activity series using the Activity Manager.

The Activity Manager has the following features:

- **New** – Create a new activity series.
- **Save** – Save changes to an activity series description.
- **Undo** – Undo changes to an activity series description.
- **Edit** – Edit an activity series.
- **Rename** – Rename an activity series.
- **Delete** – Delete an activity series.
- **Report** – Create a report that shows all people in an activity series.
Creating a New Activity Series

To create a new activity, select Activities / Activity Manager to display the Activity Manager screen. Then click New and follow the steps below:

Step 1: Enter Activity Name and Description

1. Enter the activity series name and description.
2. Click Next.

Step 2: Select Type of Activity

1. The activity series type indicates who can be added to the activity series, such as Customers, Contacts or both Customers and Contacts. This is important because it determines the campaigns that are available for the activity series as well as who can be added to it.
2. Click Next.

Step 3: Select Activities

1. Select the action from list: Add to campaign or Add Task.
2. When adding Outlook tasks, fill out the information to define the task. You can also assign this Outlook task to another person if desired. Keep in mind that when defining Outlook tasks, the information you enter will be used every time you add a Customer or Contact to this activity series. This is especially important if you are assigning Outlook tasks to other people. When you assign a person to a task, they will always be assigned this task when you add someone to the series.
3. 
4. The Task Mode indicates if the task is Independent or Dependent. An Independent task will be created in Outlook immediately when someone is added to the series. A Dependent task will not be created in Outlook until the previous task or campaign is completed.
5. 
6. The first activity in a series must be Independent.
7. 
8. **Note:** There are no start and due date fields in the Outlook task definition screen. These dates are created automatically when you add a person to the activity series. The days between the start and due dates is determined by the task length value.
When adding campaign activities, select the campaign from the list of eligible campaigns. The activity series type determines which campaigns are available. You can also indicate if the campaign is Dependent or Independent. When you add someone to the activity series, the person is added immediately to all Independent campaigns. If a campaign in the series is Dependent, the person is added to campaign only when the preceding activity (i.e., Task or Campaign) is completed.

The following example demonstrates how dependent and independent activities work for handling prospects. Keep in mind that these activities can be assigned to various people on your team.

a. Add Independent Task – Conduct Initial Interview
b. Add Dependent Task – Run Credit Report
c. Add Dependent Campaign – Guaranty Letter Campaign
d. Add Dependent Task – Schedule High Trust Interview
e. Add Dependent Task – Conduct High Trust Interview
f. Add Dependent Campaign – Prequal Letter Campaign

When you add a prospect to this activity series, Market Quest creates an Outlook task for the Conduct Initial Interview activity. Since all other activities are dependent, they must wait until the preceding activities are completed. When you conduct the interview and mark the Outlook task complete, Market Quest creates an Outlook task for running the credit report. When you mark this task complete, Market Quest adds the person to the Guaranty Letter campaign. When you print the
guaranty letter, Market Quest creates the Schedule Conduct High Trust Interview task. When this task is completed, the Conduct High Trust Interview task is created and so on.

16.

17. **Note:** The previous example requires that you create 2 campaigns that have one letter in each before you can create the activity series: one for the Guaranty letter and one for the Prequal letter. Notice also that there are two tasks for the High Trust Interview: Scheduling and Conducting. This allows for assigning the tasks to different people. For example, an assistant could be responsible for scheduling and the loan originator would be responsible for conducting the interview.

18. Both Add Campaign and Add Task activities have a Days value that is important. For Outlook tasks, the Days values determine the start date of the task. The example below shows that the Follow up activity has 7 for the Days value. When you add a person to this activity series, the start date of the Outlook task is the current date plus the number of Days. Therefore, if you add a person to this activity series on 07/10/2005, the Outlook task start date will be 07/17/2005. In addition, the Outlook due date is set to the start date plus the task length value. In this example, if the task length is 1, the due date is set to 07/18/2005.

19.

20. The Days value for Add Campaign activities determines when the first letter of the campaign is scheduled to print. When you add a person to the activity series, the first letter of the campaign will become due on the current date plus the number of days. If the Days value is 0, the first letter is due to print on the day you add the person to the activity series.

21. The Select Activities screen has the following features:

- **Add** – Add an Outlook task or add to campaign based on the Action value.
• **Edit** – Edit an Outlook task definition.
• **Remove** – Remove an Outlook task from the list.
• **Days** – Change the number days value.

**Step 4: Define Activity Events (Optional)**

An activity event determines automatically when to add and remove people to and from the activity series. For example, add a customer to an activity series when the status is Prospect and remove the customer from an activity series when the status is Client.

An activity event consists of the action to take (i.e., Add or Remove), the database trigger field to monitor (e.g., Customer Status), and the trigger value (e.g., equals to Client). Market Quest monitors the events you define and takes the specified action when information in the trigger field matches the trigger value.

The following fields are available for creating activity events for customers:

• Status
• Group
• Sales Stage

The following fields are available for creating activity events for contacts:

• Contact Status
• Contact Group
• Priority
• Title
• Sales Stage

**Note:** You cannot create activity events for Contacts & Customer-type activities.
Adding People to Activity Series

After an activity series is created you can add people from the Customer and Contacts databases manually. If you defined Activity events, a person is added to an activity series when the trigger values match the event conditions. Market Quest checks all activity events when you save the record. The following describes how to manually add a person to an activity series.

To add a person using drag and drop and the activities list:

1. If the Activities list is not showing, select View / Lists and Show Activities List.
2. Go to the contacts or customers database to display the list of activities.
3. Find the person in the Record list by typing the last name.
4. When the person is found, click on the name in the list, hold the left mouse button down and drag the name to a campaign in the Activities list. Let go of the mouse button.

To add a person to an activity from the menu:

1. Go to the person’s record in the Customers or Contacts database.
2. Select Activities / Add to Activity. You can also right mouse click and select Activities / Add to Activity.
3. Select an activity from the list.
4. If the activity series contains Outlook tasks, Market Quest creates linked Outlook tasks with the person displayed. If Outlook tasks are assigned to other people, they are e-mailed the task. For more information on how assigned Outlook tasks are managed, see the section called Creating and Managing Outlook Tasks.
5. If the activity contains add to campaign activities, the person displayed is added to the campaign and the first letter is scheduled to print at the appropriate time.

Removing People from Activities Series

There are several ways to remove people from activities. You can manually remove them or Market Quest automatically removes them if you defined an Activity event and the trigger value matches the event condition. The following describes how to manually remove a person from an activity.

To remove a person from an activity:

1. Go to the person’s record in the Customers or Contacts database.
2. Select Activities / Remove from Activity. You can also right mouse click and select Activities / Remove from Activity.
3. Select an activity from the list.
4. Market Quest removes the person from all activities created. All unassigned Outlook tasks created by this activity series are deleted from the Outlook task list. However, Market Quest cannot delete assigned Outlook tasks. If the person was added to a campaign, they are removed.
Viewing Activity Series Status

One of the advantages of defining activity series is that you can view the status of multiple tasks on one screen.

To determine if a person is in an Activity Series:

1. If the Record List is not Showing, select View / Lists and Show Record List.
2. Locate the person in the list.
3. If the person’s name is blue, this means that the person is in an Activity Series or a campaign.
4. Click the right mouse button to display all activities and campaigns.

To view Activity Series status:

1. Go to the person’s record in the customers or contacts database.
2. Select Activities / View Activity Status. You can also right mouse click and select Activities / View Activity Status.
3. If the person is in multiple activities, select an activity from the list. The screen below displays all tasks created by the activity series. The upper screen shows all Outlook tasks created.
4. The lower screen shows the campaigns the person was added to by the activity series.

The upper activity status screen has the following features. These features are not available for tasks assigned to other people. Click the box beside tasks to select them in the list.

- **Edit** – Edit an Outlook task.
- **Delete** – Delete an Outlook task.
- **Mark Complete** – Mark an Outlook task complete.
- **Select All** – Mark all items in the list.
- **Select None** – Unmark all items in the list.

The lower activity status screen has the following features.
- **Remove** – Remove this person from the campaign.
- **View** – View a list of all campaigns this person is in.
- **Report** – Print an activity series report
- **Order** – View all activities in order

### Refresh Market Quest with Outlook Data

As you add and modify Outlook task and appointment information from Outlook, it is useful to occasionally refresh Market Quest data. When you refresh, all linked appointments and tasks are read from Outlook into Market Quest. This is a different feature than synchronizing data between Market Quest and Outlook.

This feature is also used to read e-mail received and sent from Outlook.

**To refresh Market Quest with Outlook data:**

1. Start Market Quest
2. Click ![refresh](image) to refresh Market Quest with Outlook data.
3. Select the refresh options from the screen displayed below:
4. 
5. 
6. 
7. 
8. 

The Refresh screen has the following features.

- **Refresh Screens** – Refresh screens with data that may have been changed by Outlook or another user in a network environment.
- **Read Outlook Appointments** – Read all Outlook appointments and link them to Market Quest customer and contact histories.
• **Read Outlook Tasks** – Read all Outlook tasks and link them to Market Quest customer and contact histories.

• **Read Outlook Inbox** – Read all e-mail in the Outlook Inbox and link them to Market Quest customers and contacts.

• **Read Outlook Sent Folder** – Read all e-mail sent from Outlook and link them to Market Quest customers and contacts.

• **Read Outlook Drafts Folder** – Moves all Market Quest e-mail in the Drafts folder to the Outbox folder.

Note: Market Quest links e-mail received and sent from Outlook by matching the Outlook e-mail addresses with the main e-mail address in the Market Quest customer and contact records. Market Quest keeps a permanent copy of any e-mail that can be linked to a customer or a contact, even if you delete the e-mail from Outlook. You can increase the speed of the refresh by deleting e-mail from your Outlook Inbox and Sent folders after you refresh with Market Quest.

---

**Displaying E-Mail Sent and Received**

When you send e-mail directly through Market Quest, it is tracked and linked to the customer and contact records. In addition, the Market Quest Refresh feature reads all e-mail messages sent and received in Outlook and links them to customer and contact records that have matching e-mail addresses. This allows you to view all e-mail sent and received from your customers and contacts from Market Quest. Plus, if you are using a multi-user version of Market Quest, you can see all e-mail correspondence sent by other users as well.

**To display e-mail sent to a customer or contact:**

1. From Market Quest, go to the customer or contact record.

2. Click and select E-Mail Sent. You can also select View / Letters & E-Mail / E-Mail Sent to Person.

3. The screen below shows all e-mail sent directly from Market Quest and Outlook:

---

9.
10. The E-Mail Sent screen displays all e-mail sent through Market Quest and through Outlook. To change the order of the e-mail displayed, click the column heading, such as Name, E-Mail Mode, E-Mail Name or Date Sent.

- **E-Mail Mode** – The column labeled E-Mail Mode indicates how the e-mail was sent and has the following possible values:
  - Outlook E-Mail – E-mail was sent from Outlook.
  - Temp E-Mail – E-mail sent through Market Quest’s e-mail editor.
  - Single E-Mail – E-mail letter sent through Market Quest.
- **Print** – Print the e-mail.
- **Delete** – Delete the e-mail stored in Market Quest. This does not delete the e-mail stored in Outlook.
- **E-Mail Received** – Display all e-mail received from this person.

11. To display e-mail received from a customer or contact:

1. From Market Quest, go to the customer or contact record.
2. Click and select E-Mail Received. You can also select View / Letters & E-Mail / E-Mail Received from Person.
3. The screen below shows all e-mail received from the person:
Using Microsoft Outlook Interface Market Quest User Guide

The E-Mail Received screen displays all e-mail received from the customer or contact through Outlook’s Inbox. It has the following features:

- **Reply** – Displays the Market Quest e-mail editor so you can reply to the e-mail selected. The e-mail sent is tracked through Market Quest.
- **Print** – Print the e-mail.
- **Delete** – Delete the e-mail stored in Market Quest. This does not delete the e-mail stored in Outlook.
- **E-Mail Sent** – Display all e-mail sent to this person.

### Mapped Market Quest and Outlook Fields

The following table shows how Market Quest fields are mapped to Microsoft Outlook fields. Market Quest Customer and Contact records are mapped differently.

<table>
<thead>
<tr>
<th>Market Quest Field</th>
<th>Outlook Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer name</td>
<td>Contact Name</td>
</tr>
<tr>
<td>Work phone</td>
<td>Business phone</td>
</tr>
<tr>
<td>Fax</td>
<td>Business fax</td>
</tr>
<tr>
<td>Home phone</td>
<td>Home phone</td>
</tr>
<tr>
<td>Cell phone</td>
<td>Mobile</td>
</tr>
<tr>
<td>Pager</td>
<td>Pager</td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
</tr>
<tr>
<td><strong>Customer Records Only</strong></td>
<td></td>
</tr>
<tr>
<td>Employer name and address</td>
<td>Business address</td>
</tr>
<tr>
<td>Mailing address</td>
<td>Home address</td>
</tr>
<tr>
<td>Property address</td>
<td>Other address</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Loan details</td>
<td>Contact notes</td>
</tr>
<tr>
<td>MQCustomer</td>
<td>Categories</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Contact Records Only</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name</td>
</tr>
<tr>
<td>Mailing address</td>
</tr>
<tr>
<td>Home address</td>
</tr>
<tr>
<td>Spouse</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Group</td>
</tr>
<tr>
<td>Web site</td>
</tr>
<tr>
<td>MQContact</td>
</tr>
</tbody>
</table>
Managing Your Leads

Market Quest provides lead management tools to track sales activities and make predictions about your prospect pipeline. These tools help you answer common sales management questions that ultimately increase your sales.

- How many leads did I have this month?
- How many leads were converted to customers?
- What is the sales cycle to convert leads to customers? Are there sales activities that shorten the sales cycle?
- How much time did I spend on the phone this week with prospects?
- How many calls did I make to prospects?
- How many emails, letters, tasks and appointments did I make with prospects?
- What is my projected sales forecast for this month?
- Am I spending too much time on certain activities that do not increase my sales?

Tracking the Sales Stage

Market Quest has a sales stage field in both the customer and contact databases which can be used to define your sales process. As your prospects move through this process, this field contains the current sales stage.

The sales stage field can be used in queries to find people at a certain stage. This field can also be used for defining campaign and activity manager events. For example, you could add a prospect to a campaign when the sales stage is set to Conducted Interview.

The list of sales stage items can be modified by using the Tools \ Modify Lists menu. Add and remove items as necessary to define your sales process.

Logging Call Activity

When you make outbound or receive inbound calls, you can log how much time you spend with a person and save the call result. This helps you identify the total time spent with prospects as well as the productivity of your calls.
To log a call:

1. Go to the person’s Market Quest record.
2. Click Log Call.
3. Go to the person’s Market Quest record.
4. Click Log Call.

The Log Call screen has the following features:

- **Inbound / Outbound** – Indicates the direction of the call.
- **Save Call Result in Notes** – The call results and the call duration will be recorded in the Notes section of the main screen.
- **Call Number** – The list contains phone numbers which you can access when making an outbound call.
- **Times Called** – The number of times you called or received calls from this person.
- **Total Duration** – The total number of minutes you have spent with this person.
- **Call Duration** – When you click Start Call, the call will be timed until you click Stop Call. You can also enter the call duration directly into this field.
- **Sales Stage** – This is the same sales stage field on the main screen. You can change the sales stage from this list and it will update the main screen field.
- **Call Result** – After you complete a call, select the call result from the list. You must select a result before you can save the call.
- **Notes** – Enter notes in three separate areas as needed: Biggest problem, Objective and Other Notes. When making outbound calls, this information helps you focus your conversation.
• **Start/Stop Call** – Click Start Call to begin the call timer. When you finish a call, click Stop Call.

• **Save Call** – Save the call results. If the Save Call in Notes checkbox is marked, the results will be saved also in the main notes screen.

• **Cancel Call** – Don’t save the call.

• **Save Notes** – Save information in the Notes.

• **Forecast** – Displays the forecast screen for entering forecast information.

### Making Sales Forecasts

When you believe a prospect is likely to become a customer, you can put them on your sales forecast. This will help you track your prospects more effectively.

**To add a person or view the forecast:**

1. Go to the person’s Market Quest record.
2. Select View / Forecast.

![Arthur Aguilar Sale Forecast](image)

The forecast screen has the following features:

- **Est. Sale Date** – Estimated sale date. Enter the date directly into the field or click the calendar to pick a date.

- **Probability** – Select the probability for making the sale. The probability cannot be less than 50%.

- **Sale Value** – Enter the value of the sale or loan amount.

- **Comments** – Enter any comments regarding this forecasted sale.

- **Save** – Saves the forecast information.

- **Remove** – Removes the prospect from the forecast.

### Lead Management Reports

Market Quest has several lead management reports that enable you to analyze your sales activities. This information is useful to determine which activities are most productive and which are not.
• **Lead Management Report** – Summarizes all sales activities, such as calls made and received, email and letters sent, sales cycle and conversion rate.

• **Lead Detail Report** – Shows all sales activities by lead, such as calls made and received, email and letters sent, interviews conducted, and tasks and appointments set.

• **Lead Stage and Call Report** – Summarizes leads by sales stage and call results.

• **Forecast Report** – Shows all leads on the forecast, including confidence level, sale value, and notes and telephone numbers for follow up calls.
Using Queries to Find People

Query Essentials

Many Market Quest features allow you to search, sort and group information. These features are important for obtaining information that pertains to your specific marketing goals and objectives. With continued use, your database will grow and you will need to manage many records. You may have 1,000 records in your database, but at times you may be only interested in 10 records, or just one specific record.

Market Quest allows you to define queries to select only certain database records. A query is a conditional statement used to search for records in the database. You use queries for reports, marketing campaigns and creating groups. For example, you may want to create a group of customers who have open loans worth more than $100,000. You create a query to find these records for the group.

Creating queries involves the following steps:

1. **Entering a query title.** Titles should be descriptive to help you recognize the query at a future time, such as “Prospect Realtors” or “Loans over $100,000.” The new title appears in the list of queries displayed on the screen.

2. **Adding a condition.** A condition has three parts: field, operator, and comparison value.
   a. **Field:** Database field you want to search. There are different kinds of fields, such as dates, numbers, and text fields. Market Quest searches these fields to determine if the record is retrieved.
   b. **Operator:** The operator is used to compare records, such as greater than, less than, or equal to.
   c. **Comparison Value:** Specifies the values used to find records. Comparison values may be words, numbers, or dates.

3. **Adding a Connector.** Connectors are either AND or OR. A connector connects two or more conditions together to retrieve records. For example, consider the query: Customers who have loans over $300,000 AND live in San Diego. Both conditions must be true in order to retrieve the record.

4. **Adding Conditions and Connectors.** To fully specify the records you want to find, a query may need to have more conditions.
How to Create a Query

Queries can be created from several different areas of Market Quest. The query process begins when you choose one of the following Market Quest features:

- **Set Group** Select Group / Set Group.
- **Reports Queries** from the Reports menu.
- **Create Target List** from the Campaign Manager Wizard.

To create a query:

The following describes the general steps for creating a query for setting a group view in the Customers database. The same steps apply for the Contacts database and for other functions that use queries.

1. Go to the Customers database.
3. Click New.
4. Enter a title for the query. Give the query a descriptive name so that it can be easily recognized later. Click OK.
5. Click Add.
6. Step 1 - Pick a Field. Select a Market Quest field to search.
7. Step 2 - Pick Operator. The operator is used to compare records, such as greater than, less than, or equal to, etc.
8. Step 3 - Enter a Value. This specifies the values used to find the records. Comparison values may be words, numbers, or dates depending on the type of field searched. Enter a value and click Finish or click Ask Later. Ask Later means that you’ll be asked for values each time you use the query.

Adding Additional Conditions to the Query

You may need to add more than one condition to your query to select the records you desire.

1. Click Add.
2. Select a Connector:
   - AND - Both this condition and the prior condition must be true.
   - OR - Either this condition or the prior condition must be true.
3. Repeat Steps 6-8 above to define the new condition.

Adding a Bracket

The Bracket option provides you with the capability to create complicated query conditions. Brackets are used when there are two or more conditions and you want certain conditions evaluated together.

1. Select the beginning condition to bracket.
2. Click Bracket.
3. Click Insert.
4. Select the ending condition to bracket by double-clicking the mouse the desired condition. Parentheses are inserted around the beginning and ending conditions.

Removing a Bracket

1. Select the first condition that contains the first bracket.
2. Click Bracket.
3. Click Remove.
4. Select the ending condition by double-clicking the mouse. The parentheses are removed.

Using a Query:

1. Click Close to return to the Customer Queries list.
2. Highlight a query and click Select.

Editing a Query

You may change the comparison values, operators, and fields of the condition. You may also move conditions around and you may switch connectors (i.e., AND to OR and vice versa).

To edit a query:

1. Select the query to edit from the queries list.
2. Click Edit.
3. If there is more than one condition in the query, click the condition you wish to edit.
4. Click Edit.
5. Click the step you wish to change.

Switching Connector Types

The Switch button allows you to switch a connector type. It is only valid if you have more than one condition. It switches OR to AND and vice versa.

1. Select the line with the connector to switch.
2. Click Switch.

Moving Conditions
Move is only valid if you have two or more conditions. It moves selected conditions from one place to another. For example, if you have two conditions, the Move button moves the first condition to line 2. The second condition is now line 1.

1. Select the line with the condition to move.
2. Click Move. A check mark appears in front of the condition.
3. Select the line where you want to move the condition.
4. Press Enter or double-click the condition.

---

**Query Tutorial**

In this tutorial you will set a group view for loans greater than $270,000 that closed in 2009. This query has the following parts:

- **Fields** = Loan amount and closing date
- **Operators** = greater than and between two dates
- **Connectors** = AND

**Final Query** = Loan amount is greater than $270,000 AND the close date is between 01/01/09 and 12/31/09

**Getting Ready to Use the Query**

1. Go to the Customers database.
2. Create two customer records with the following information:

   **Customer 1:**
   - First Name: Elizabeth
   - Last Name: Roleder
   - Loan Amount: $350,000
   - Close Date: 01/20/09

   **Customer 2:**
   - First Name: Cynthia
   - Last Name: Kasten
   - Loan Amount: $590,000
   - Close Date: 11/29/09


**Creating the Query**

1. Click New.
2. Enter a title, such as “Loans in 2002 over $270,000” and click OK.
3. Step 1: Pick a Field
   - Select the “Loan Amount” field in the list and click Next.
4. Step 2: Pick an Operator
• Click “Greater than”.

5. Step 3: Enter a Value
• Enter the number “270,000” and click Finish.

6. Add a Connector. If you have one condition, connectors are not needed. In our example we have two conditions.
• Click Add.
• Click AND.

7. Pick a Field:
• Select “Close Date” and click Next.

8. Pick Operator: Click “Between Two Dates.”
• Enter Dates:
  From: 01/01/09
  To: 12/31/09

9. Click Finish.

10. The entire query should appear as follows:
• Loan amount is greater than 270000 AND
• (close date ranges from 01/01/09 to 12/31/09)

11. Click Close to save the query and return to the Customer queries window.

12. Highlight the query title and click Select to set the group view.

13. The group should show at least the two records entered earlier in this tutorial. Delete these two records when you are finished with the tutorial.

14. Select Group / Clear Group to show all records.

Query Suggestions

Creating queries is a very powerful feature that allows you to control and access the data exactly as you desire. Queries help you manage your data efficiently as your database grows with past, present, and future clients. This section contains some suggestions for creating queries.

Queries can be broad or narrow depending on your data. Broad queries result in retrieving more records than a narrow query. For example, the broad query “loans greater than $100,000” would locate more records than the narrow query “loans equal to $100,000.” Of course, the actual number of records located depends on your data. Use your knowledge of the database to construct narrow or broad queries to meet your specific needs.

In general, avoid creating very complex queries. They can be erroneous and may not locate the records you want. If the query does not locate the desired information, here are a few things to check:
• Check the query. Are the field, operator, and comparison value correct?
• Is the query impossible? For example the query “Loan amounts greater than $150,000 AND loan amounts less than $150,000” will not locate any records. This condition does not work because AND is the connector. In this example, it means that a loan has to be both greater and less than $150,000 to be found by the query, which is impossible.
• Check the fields in the Customers and Contacts databases. Are there values that match the query condition and comparison values? The query might be correct, but there may be no data to match the records.

• Before creating queries, it may be helpful to first write down exactly what you want to accomplish. Once you state the query in your own words, determine the corresponding fields, operators, and values needed to construct the query. Consider the following statement:

• “I want to set a group view that includes only Customers who have open FHA loans.” To construct the query you need to consider what fields you need to search as well as the possible values contained in each field.

In this example:

**Fields:** Loan Status, Loan Program

**Operators:** Exactly matches

**Comparison values:** OPEN, FHA.

**Query:** Loan Status exactly matches "OPEN" AND Loan Program exactly matches “FHA.”
Using Predefined Reports

One of Market Quest’s goals is to provide many predefined industry-specific reports that you may need to manage and control your business. There are reports for customers, contacts and both customers and contacts.

If you are using the Multi-User Enterprise system, you can report by sales rep or across all sales rep’s data.

Running Predefined Reports

All predefined reports have a common method for running them. Most of the reports need date information to select records. For example, the Closing Report uses the Estimated Close Date to select people for the report. This allows you to limit the amount of data selected for a report. You can run reports for different time periods, such by week, month, year or year to date.

To run a predefined report:

1. Select Reports / and select a customer, contact or general report.

The Report Date Range screen provides the following features:

- **Enter Date Range** - Enter the date range that will be used to select records for the report. The type of date used is listed below the fields.
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Market Quest Reports

- **All Data** – Selects all data for the report.
- **Month** – Select a month for the date range.
- **Year to Date** – Enters the year to date.
- Enter date range directly into the fields.

- **Print** – Print the report.
- **Preview** – Previews the report.
- **Edit** – Edit the Report Form. Not all reports can be edited. Be very careful when editing predefined reports. Limit your changes to formatting. If you delete a field, you might not be able to run the report.

### Customer Reports

#### Related Parties Report
This report shows the customers and all the contacts involved with this customer. It uses the date contacts were assigned to the customer.

#### Customer List
This report generates a list of customers. It uses the customer Create Date field to select customers for the report.

#### Customer Profile
This report shows the information of the customer currently displayed. It does not use a date range to select people. However, you can edit and preview the report.

#### Lead Summary
This report uses the Lead Source field on the Customer Marketing screen to summarize where your leads that closed are originating. It uses the Customer Close Date to select customers.

- **Lead Management Report** – Summarizes all sales activities, such as calls made and received, email and letters sent, sales cycle and conversion rate.
- **Lead Detail Report** – Shows all sales activities by lead, such as calls made and received, email and letters sent, interviews conducted, and tasks and appointments.
- **Lead Stage and Call Report** – Summarizes leads by sales stage and call results.
- **Forecast Report** – Shows all leads on the forecast, including confidence level, sale value, notes and telephone numbers for follow up calls.

### Contact Reports

#### Related Parties Report
This report shows contacts and all the related parties they are in during a specific time period. It lists the contact name and the assigned customers. It uses the Assignment Date to select contacts for the report.

#### Company List
This report shows a list of companies and their associated contacts. It groups companies by address. It uses the Contact Create Date to select records.

#### Contact List
This report lists the contacts in the Contacts database. It uses the Create Date to select contacts.
Contact Profile
This report shows the information of the contact currently displayed. It does not use a date range to select people. However, you can edit and preview the report.

Group Report
This report uses the Group field to summarize your contacts. It uses the Create Date to select contacts.

Lead Detail Report – Shows all sales activities by lead, such as calls made and received, email and letters sent, interviews conducted, and tasks and appointments.

Lead Stage and Call Report – Summarizes leads by sales stage and call results.

General Reports

Letter History
This report shows all letters printed during a certain time period. It uses the date the letter was printed.

Market Production
This report shows all marketing letters that were sent during a certain time period and the number of referrals and clients received. When you add a referral or when the status of a customer or contact is set to Client, Market Quest flags the last marketing letter sent to the person. This report helps determine the success of your marketing.

Referrals Provided
This report lists the people you have referred to other professionals. It uses the date when you referred the person to others (i.e., when you used the Refer To feature).

Referrals Received
This report lists the people who gave you referrals. It uses the date you assigned a person as the referral source for a customer.

Verify E-Mail Address Format
This report verifies that e-mail addresses are in the correct format. For example, all e-mail addresses must have an @ sign and at least 1 period. Verification does not check to see if the e-mail address actually exists or will not bounce back.

Creating and Editing Custom Reports
Custom reports are created using the Queries, which were discussed in the previous section. To create a custom report, you need to create a query that is used to find people for the report and then select which fields to output. Once a report is created, you can modify the report to change the layout.

To create a custom report:

2. Select the type of report to create: Customer, Contact or Customer and Contact report.
3. Create a new query using the features discussed in the section called Using Queries to Find People. You can also select an existing query.
5. Select the fields for the report by double-clicking on the fields in the left list to move them to the right list. Click Close when finished.
6. A Report Summary screen displays the report characteristics. It has the following features:

- **Edit Query** – Modify the query used to find people for the report.
- **Pick Output Type** – For normal reports, use a column report. You can also export data to a file.
- **Edit Output Fields** – Add or remove fields shown in the report.
- **Edit Sort Order** – Specify the order of the records reported.
- **Browse Query Results** – When Run Report is clicked, shows data in a spreadsheet format.
- **Hide Duplicate Records** – If there are duplicate records found in the query results, they will not be included in the report.
- **Run Report** – Runs the report. If the Browse Query Results is unmarked, a Report Setup screen displays.

The Report Setup screen gives you options for editing the report form and outputting the report.

- **Output Direction** – Specifies where to output the report:
  - Printer
  - Disk File
  - Screen
• **Start Report** – Runs the report
• **Edit Form** – Modify the report form
• **Browse Results** – Displays the data in spreadsheet format
• **Reset Form** – Returns the report form to its original state. Removes any changes made.
• **View Text File** – Select a text file and display the data.

**To edit a report:**

1. Once a report is created using the steps described above, you can modify the report:
2. Select Report / Report Queries and select the type of report.
3. Select the query used for the report and click Report.
4. The Report Summary screen displays the report characteristics that can be edited.
5. If you want to edit the report form, click Run Report and then Edit Form on the Report Setup screen.

---

**Report Form Edit Tools**

With Market Quest you can customize report forms to suit your business needs. This section explains how to use the Edit Form functions to modify report forms. Many of the tools described in this section are advanced and are for more complicated report functions. However, there are basic features for customizing the report form, such as changing fonts, adding text, and drawing lines.

**Report Form Objects**

Market Quest reports are composed of objects that can be manipulated in a variety of ways. Text, fields, and graphics are all “objects” that you can drag to wherever you want them. A selected object has dark squares called object handles in the corners and sometimes midway along the sides.

• **Label Objects** – Text objects that can be selected, moved or deleted.
• **Field Objects** – Displays data from a database.
• **Graphic Objects** – Includes pictures, lines, rectangles and other drawn objects.

**To edit the report form:**

1. Select Report / Report Queries and select the type of report.
2. Select the query and click Report.
3. The Report Summary screen displays the report characteristics that can be edited.
4. Click Run Report to display the Report Setup screen.
5. Click Edit form.

**To close the report form:**

Click the `X` icon to close the screen.
Report Form Band Types

Depending on your needs, there are several optional bands you can use in reports:

**Title/Summary Band**

The Title band contains information that appears before the main report. A report title can be as simple as the name of the report at the top of the first page, or it can be an introductory paragraph or even a cover letter. It’s anything you want to appear on the first page of your report. The information contained in the Title band is printed once for the entire report.

The Summary Band is one or more pages that appear after the main report. It can contain summary information (totals or averages) or text that summarizes the contents of the report. Like the title, it is printed once per report.

To add Title and Summary Bands:

1. Select Report / Title Summary.
2. Mark the Title Band checkbox.
3. If you want the Title to appear on a new page, mark New Page.
4. Mark the Summary checkbox.
5. If you want the Summary to appear on a new page, mark New page.
6. Click OK.
7. The Title and Summary bands are added to the form.
8. Click the up arrow and drag the band down to create space for the title page. Add other objects to the page as described later as needed.

**Page Header Band**

At the top of each page of the main report is the Page Header band. A page header might include the report title, date, page number, and so on. It will appear on every printed page.

**Group Header Band**

When the data is grouped, each group can have a group header printed before it. These headers help to identify the information that is contained within each level of grouping.

**Detail Band**

The Detail band that makes up the report usually contains field information from the databases. The information printed in the Detail band usually comes directly from fields or from calculations performed on fields.
Group Footer Band
When data is grouped, each group can have a group footer printed after it. These footers typically display summaries and/or subtotals of the information that is contained within each level of grouping.

Page Footer Band
At the bottom of each page of the main report is the Page Footer band. Like the page header, the page footer usually contains a combination of fixed and variable data, report name, date, page number, and so on. It can also include summary information (such as totals or averages) for data on that page.

Changing Report Band Area Size
A report band can be any size you like.
Click the arrow to the left of the band and drag the band up or down to change the area of the band area size.

Adding and Changing Label Objects
When the report is created, the report form contains label objects that describe the output fields selected. These can be changed and other text objects can be added to the form.

To add label objects:
1. Select Report / Insert Control / Label.
2. Type the label. Drag the label to any place in the form.
3. To change the font, select Format / Font and select the font type and size.
4. If you always use the same font for labels, you can change the default font used for the report. Select Report / Default Font and select the font desired.

To change the label font:
1. Click on the label.
2. Select Format / Font and select the desired font style and size.

Adding Graphic and Picture Objects to Report Form
You can add lines, rectangles, rounded rectangles and pictures to the form.

1. Select Report / Insert Control and select Line, Rectangle, Rounded Rectangle, or Picture.
2. The object is created at the upper left of the title or page header band area.
3. Drag the object to the desired location. To resize the object, click the bottom right edge of the object and drag it down or up.
4. To resize a picture, double click on the picture and select scaling objects as needed.

Adding Fields to Report Form
Your report can include database fields, variables, calculated values, and calculated fields. When you created the report, the form contains the output fields selected. However, if there are too many fields
for the width of the report, you may have to add them manually. Also, if you edit the report and add another field, you may have to add it manually as well.

**To add a field to the report form manually:**

1. Select Report / Report Queries and select the type of report.
2. Select the query used for the report and click Report.
3. Click Run Report.
4. Click Browse Results. Write down the names of the fields in the spreadsheet view. You will need to know the names of the fields if they are not already in the form.
5. Close the spreadsheet view.
6. Click Edit Form.
7. Typically, you’ll add the field to the Detail band area. Resize this band, if needed, to make room for the new field.
8. Select Report / Insert Control / Field.
9. Enter the name of the field to add in the Expression field and click OK.
10. The field is created in the upper left corner of the form. Click on the field and drag to the correct location. You can also resize the field by dragging the lower right corner of the field out or in.
11. Repeat the steps above to add more fields.

**Previewing Changes**

As you make changes to the report form, you can preview and print the report to see how it looks.

**To preview the report:**

Right mouse click in the report form and select Preview.
Managing Marketing Campaigns

Marketing Campaign Components

The Campaign Manager allows you to create and manage marketing campaigns. Marketing campaigns involve sending one or more letters or e-mail to a group of people on a timed basis.

When creating marketing campaigns, you need to consider:

- When do I want the campaign to begin?
- Who do I want to receive the campaign letters?
- Which letters do I want to send?
- How often do I want to send letters?

Marketing campaigns consist of these elements:

- **Target List** - The Target List contains the group of people who will receive letters.
- **Letter List** - The Letter List contains one or more letters sent during a marketing campaign. There is no limit to the number of letters in a Letter List.
- **Campaign Status** - A marketing campaign can have the following operational statuses:
  - **Incomplete** - The campaign is missing a component.
  - **Ready** - The campaign is ready to print the first marketing letter.
  - **Active** - The first letter of the campaign has been printed. The campaign has scheduled letters to print in the future.
  - **Completed** - All letters of the campaign have been printed.
  - **Cancelled** - A once active campaign has been cancelled.
- **Start Date** - The date the marketing campaign begins.

Campaign Manager Features

The Campaign Manager provides various features for creating and managing marketing campaigns.
To display the Campaign Manager, click $.

The Campaign Manager has the following features:

- **New** – Create a new campaign.
- **Save** – Save changes to a campaign description.
- **Undo** – Undo changes to a campaign description.
- **Edit** – Edit a campaign.
- **Rename** – Rename a campaign.
- **Delete** – Delete a campaign.
- **Report** – Create a report that shows the people in a campaign and the letters sent.
- **Map** – Map special interest categories to a marketing campaign.
- **Test** – Prints all letters or sends e-mail in the campaign. This is useful for testing the formatting and for reviewing the marketing content of the letters.
Creating New Marketing Campaigns

To create a new campaign, click \( \text{Campaign Manager} \) to display the Campaign Manager and then click New.

**Step 1: Enter Campaign Name and Description**

1. Enter the campaign name and description.
2. Click Next.

**Step 2: Select Type of Campaign**

1. The campaign type indicates who will be receiving letters, such as customer, contacts or both customers and contacts. This selection is important because it determines the letters available for the letter list and the people who can be added to the Target List.
2. For example if you select a customer campaign, you can only use customer type letters and you can only add customers to the Target List.
3. Click Next.

**Step 3: Select Letters for the Campaign**

The Letter List is the list of marketing letters that will be mailed to people in the campaign. You can create a new list or import a list of letters from another campaign. The campaign type determines the letters available for the Letter list. For example, if the campaign type is for contacts, only contact letters are listed.

**Note:** You must first create marketing letters using the Letter Manager before you can use them in campaign Letter List. Also, the type of letter is very important when creating the letter. For example, if you create a letter that is a contact-type letter, the letter will not be available when creating a customer-type campaign.
To create a new Letter List:

1. Select the letters from the left list and click Add or double click to move them to the Letters in Campaign list.
2. Set the Days Between Letters value at the bottom right side of the screen. This value specifies how often to send letters. The default value is 7 days.
3. The order of the letters in the right list determines when the letters will be printed. The first letter to print is the top letter.
4. To change the order after letters have been moved, click the small box to the left of the letter name, hold the left mouse button down and drag the letter up or down.
5. To change the days between letters in the list, click the letter and then Change Days.
6. Click Next when finished.

To import letters from another campaign:

1. Click Import.
2. Select a campaign. The letters used in the selected campaign will be imported into the letter list.

Step 4: Select People for the Campaign

The Target List is the group of people who will receive letters during the marketing campaign. You can import an existing Target List from another campaign or create a new one. The type of campaign determines the people displayed in the list. For example, if the campaign type is for customers, only customers will be displayed in the list.

A (B) appears after a customer’s name to help distinguish customers from contacts.
Note: You can create a campaign without selecting people for the Target List in the campaign manager. After a campaign is created, there are several ways to add people to campaigns from the Customers or Contacts databases. See the section on Adding People to Campaigns.

To create a new Target List:

1. You can select people for the campaign in one of two ways:
   - Find each person in the list and double-click or click Add to move the person to the right list.
   - Click Select Query. You can select a query to find specific people for the marketing campaign. For example, you can find contacts that have the group value of Realtors. See Creating Queries.
2. Click Next when finished.
3. **Note:** Only people with Mail Status set to Send Letters can be added to Target Lists.

To import a Target list from another campaign:

1. Click Import.
2. Select a campaign. The people in the campaign will be imported into the Target List.

**Step 5: Define Campaign Events (Optional)**

A campaign event determines when to add and remove people to and from the marketing campaign. For example, add a customer to a campaign when the Status is set to Prospect and remove when the Status is Client.

A campaign event consists of the action to take (i.e., Add or Remove), the database field to monitor (e.g., Customer Status field) and the trigger value (e.g., equals to Prospect). Market Quest monitors the
events you define and takes the specified action when information in the database field matches the trigger values.

There are many advantages to using campaign events:

- You can define events to remove a person from one campaign and add the person to a different campaign.
- Market Quest always notifies you before adding or removing a person from a campaign.
- You can define one-letter special purpose campaigns and add people automatically.

The following fields are available for creating campaign events for Customer campaigns:

- Customer Status
- Priority
- Sales Stage

The following fields are available for creating campaign events for Contact campaigns:

- Contact Status
- Contact Group
- Priority
- Sales Stage
- Title

**Note:** You can't create campaign events for Contacts & Customer-type campaigns

To create a campaign event:

1. Select an action from the Action list (i.e., Add or Remove)
2. Select a field from the Trigger Fields list.
3. Select a value from the Trigger Value list.
4. Click Add Event to add the event to the list.

You can create several events for a campaign by using the OR and AND connectors. For example, you can create an event to add a person to a campaign when Contact Group equals "Realtor" OR when Contact Group equals "Selling Agent" OR Contact Group equals "Listing Agent". In this case, when the Contact Group field matches any of the target values, the person will be added to the campaign.

**Event Suggestions**

Campaign events are very flexible and can be used for many different purposes. The following are suggestions for creating events.

- Avoid very complex events. It may be difficult to determine exactly when they add or remove people because of the number of fields and connectors involved.

- If you have a complex situation that you want to add or remove someone from a campaign, it's better to define a specific value for one of the fields. Use the Modify List feature under Tools to add values to any list. Then you can specify these values in events to trigger certain actions.

- In some situations, it may be better to use the Add to Campaign or Remove from Campaign commands under the File menu to add or remove people manually.

- You can create a series of events that transfers a person from one campaign to another when database information changes. Consider this scenario:

  - You have two campaigns called Prequalify and First Time Buyer. Define events for the Prequalify campaign to add when the Customer Status field equals "Prequalify" and remove when the Customer Status equals "Client."

  - Define events for the First Time Buyer campaign to add when the Customer Status equals "Client"

  - When you enter a customer and set the Customer status to "Prequalify" and save, the customer will be added to the Prequalify Campaign. When you change the Customer Status to "Client", two events occur. The customer will be removed from the Prequalify campaign and added to the First Time Buyer campaign automatically.

**Step 6: Select Campaign Start Date**

1. Enter the date to start the marketing campaign or click the Calendar button to select a date.
2. Enter the number of days before the first letter. When you add a new person to a campaign, this value is used to schedule the first letter of the campaign. For example, if you enter a 30 and add a person to this campaign today, their first letter is scheduled to print in 30 days.
3. The default value is 0, which means the first letter is due to print the day you add a person to a campaign.
4. Click Next.

**Step 7: View New Campaign Status**
If the Campaign status is Ready and you have added people to the Target List, there are letters due to print for this campaign. If you left the Target List empty, the letters will become due to print when you add people to the campaign later.

If the Campaign status is Incomplete, the Letter List is empty. Go back to Step 3 and select letters for the campaign.

---

**Editing Marketing Campaigns**

Once a campaign is created, you can change it to meet your needs. However, not all components can be changed. You can edit a campaign from the Campaign Manager or from the customer or contact campaign list.

You can edit the following components:

- Name and description
- Letter List
- Target List
- Events
- Number of Days before first letter
- Campaign Status

You **cannot** edit the following:

- Type of campaign
- Campaign Start Date

**To edit a campaign from the campaign list:**

1. If the campaign list is not showing, select View / Lists and Show Campaigns List.
2. Go to the Contacts or Customers database to display the campaigns to edit. For example, if you want to edit a customer type campaign, you must be in the customer’s database for the campaign to show in the list.
3. Double click on the campaign to edit.

**To edit a campaign from the Campaign Manager:**

1. To edit a campaign, click to display the Campaign Manager.
2. Select the campaign to edit from the list and click Edit.
3. The campaign wizard displays, click the tab of the component to edit.
4. Click Close to save changes.

**Caution:** When you cancel and then restart an active campaign, everyone in the campaign will receive Letter 1.

**To change the Target List:**

1. Click the Target List tab.
2. You can add people and remove people from the list by using the Add and Remove buttons.
3. If you selected a query to add people to the campaign, you can rerun the query to add and remove people from the Target List. If you didn’t use a query when you created the campaign, the Rerun option is not available.

4. Click Rerun Query and select one of the following options:
   - Add People Only – Add people if they are not in the campaign and they are selected by the query.
   - Remove People Only – Remove people from the campaign if they are no longer selected by the query.
   - Add and Remove People – Add new people selected by query and remove people who are not selected by the query.

As an example of how these rerun options work, let’s say you created a query that selected customers for this campaign whose status is set to Prospect. Over time, you’ll add customer records whose status is set to Prospect and there will be customer records whose status field is changed from Prospect to Client or some other value.

When you rerun the query for this campaign and select the Add and Remove option, it will add new people whose status is Prospect and remove people whose status is not set to Prospect.

**To change the Letter List:**

1. Click the Letter List tab.

2. Use the Add and Remove buttons to add and remove letters from the list. You can also change the days between letters.

   **Caution:** Be very careful when changing a Letter List of an Active campaign. You could get errors when printing letters. The following are precautions:
   - You can add letters to the end of a Letter List. The only precaution is people who have completed the campaign (i.e., received all letters in the list) will not receive the newly added letters. It’s best to add letters to the campaign before people finish the campaign.
   - This doesn’t apply to the special interest campaigns purchased by Market Focus. The installer will start people in the campaign on the new letter.
   - If you remove a letter from a Letter List, you may get errors if that letter is due to print.
   - If you change the number of days between letters, the change doesn’t take effect until the previous letter is printed. For example, let’s say you change the days between letters of letter 2 from 7 days to 30 days. This change doesn’t affect any letters scheduled to print. The change takes effect after letter 1 is printed and letter 2 is scheduled 30 days later.

**To change the campaign status:**

A campaign can have the following statuses:

- **Ready** – Letters have not been printed.
- **Active** – Letters were printed.
- **Completed** – All people have been sent all letters in the campaign.
- **Cancel** – Cancel an active campaign
- **Restart** – Restart a cancelled or completed campaign.

1. To edit a campaign, click 📊 to display the Campaign Manager.
2. Select the campaign to edit from the list and click Edit.
3. Click the Status tab and change the campaign status.
4. Click Close.

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### Mapping Special Interests to Marketing Campaigns

The Customers and Contacts databases have an Interest screen where you can record areas of interest. This feature allows you to map a specific interest to a marketing campaign. When the interest checkbox is marked in the customer or contact Interest screen, the person will be added to the campaign. Likewise, if the checkbox is unmarked, that person will be removed from the campaign.

If you purchase Special Interests letters from Market Focus, the interest checkbox is automatically mapped to the campaign when it is installed.

If you create your own interest campaigns, this feature allows you to map checkboxes on the Interest screen to your campaign:

**To map an interest checkbox to a campaign:**

1. Create the marketing campaign using the Campaign Manager. If you want to add both customers and contacts to the campaign, create a Both type of campaign.
2. Click Map.
3. Select Map Customers or Map Contacts interests and click Select.
4. Select the interest to map from the left list.
5. Select the campaign from the right list.
6. Click Map. Repeat steps 3 and 4 to map other interests.
7. Click Close when finished.

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### Adding People to Marketing Campaigns

After a marketing campaign is created you can add people to a campaign from the Customer and Contacts databases and from the Card File View. You can add one person or a group of people to any ready or active campaign.

**To add a person using drag and drop and the campaign list:**

1. If the campaign list is not showing, select View / Lists and Show Campaigns List.
2. Go to the Contacts or Customers database to display the list of campaigns.
3. Find the person in the Record list by typing the last name.
4. When the person is found, click on the name in the list, hold the left mouse button down and drag the name to a campaign in the Campaigns list. Let go of the mouse button.
5. An options screen appears. See screen below.

To add a person to a campaign from a menu command:

1. Go to the person’s record in the contacts or customers database.
2. Select File / Add to Campaign or right mouse click and select Add to Campaign.
3. Select a campaign from the list.
4. An options screen appears with the following information:

- Add Person Displayed – Adds one person.
- Add All – Adds all customers or contacts to the campaign.
- People to Add – Shows the number people to add to the campaign.
- Schedule Date – Date when the letter will become due to print. Click calendar or enter a new date.
- Starting Letter – Shows the name of the first letter in the campaign.
- Query Used – Show the name of the query used, if any, to create the Target List.
- Campaign Type – Shows the type of campaign.
- Letter Button – Changes the starting campaign letter for the person or people added to the campaign. By default, people added will start with letter 1 of the campaign. This option allows you to start people on a different letter in the campaign.

8. To add a group of people to a campaign:

1. Go to the Contacts or Customers database.
2. Select Group / Set Group.
3. Select a query that will set the group view. Only people selected by the query will be displayed. The name of the query appears at the bottom of the screen.

4. Select File / Add to Campaign or right mouse click and select Add to Campaign.

5. Select a campaign.

6. The Add options screen displays. Select Add All to add everyone in the group to the campaign. The People to Add field displays the number of people in the group that will be added to the campaign.

7. Select other options as desired and click OK.

**To add people from the Card File View:**

The Card File View is used in many features to display lists of people. For example, it’s used to display rate watch, birthdays, ARM adjust and balloon adjust events. You can add everyone listed in the Card File View to a campaign.

1. While the Card File View is displayed, click Add to Campaign.

2. Select a campaign.

3. The Add Options screen displays. The default option is to add the person highlighted in the Card File View list to the campaign. Click Add All People to add everyone in the list.

4. **Note:** If you click Add All People, you may get a message stating that you can’t add everyone to this type of campaign. This means that the list of people contains both customers and contacts. But the campaign selected is for only customers or only contacts.

5. Click OK.

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**Removing People from Marketing Campaigns**

There are several ways to remove people from campaigns:

**From the Menu:**

Go the person’s record and select File / Remove from Campaign.

**Edit the Campaign:**

Go to the Campaign Manager and edit the campaign. Click the Target List tab and remove the person from the list.

If you created the Target List using a query, you can rerun the query and select Remove People Only from the options. People not selected by the query will be removed.

**Viewing Campaign Status:**

Go to the person’s record and select View / Campaign Status. Then click Remove.
Viewing Campaign Status

When you want to know whether or not a person is in a campaign, you can display the campaign status for a specific person.

**To view campaign status from the Records List:**
1. If the Record List is not showing, select View / Lists and Show Record List.
2. Locate the person in the Records List.
3. If the person’s name is blue, this means this person is in an activity or a campaign.
4. Click the right mouse button to display the list.

**To view campaign status for the person displayed:**
1. Go to the person’s record.
2. Select View / Campaign Status or right mouse click and select View Campaigns.
3. A list of campaigns displays with information on the last letter sent and the next letter due to print.
4. If more than one campaign is listed, click on the campaign to view the status.

Canceling and Restarting Campaigns

After you print the first letter of a campaign, the status is set to Active. Once a campaign is Active, you can cancel or restart the campaign.

**To cancel a campaign:**
1. Go to the Campaign Manager.
2. Select the campaign to cancel.
3. Click Edit and the Status tab.
4. Change the status to Cancel.
5. Click Finish.

**To restart a campaign:**
1. Go to the Campaign Manager.
2. Select the campaign to restart.
3. Click Edit and the Status tab.
4. Change the status to Restart. When you restart a campaign, everyone in the Target List will start at letter 1.
5. Click Finish.

Campaign Status Report

The Campaign Status report shows which letters are scheduled to print for a specified time period.
1. Go to the Campaign Manager.
2. Select the campaign from the list.
3. Click Report.
4. Enter the time period in which letters will be due. For example, if you want to know what is due today, enter today’s date. If you want to know what letters are scheduled next month, enter from today’s date to the date 30 days from now.

Tracking Marketing Newsletters

This feature allows you to track any newsletter through Market Quest just like a regular marketing campaign. Although Market Quest will not print newsletters, it reminds you to send each newsletter, prints labels for mailing, and keeps track of each newsletter sent by noting this in the individual’s record.

To track newsletters with Market Quest:

1. Create blank letters using Word for each newsletter you want to send. Give each letter a name that describes the newsletter being sent, such as Realtor Newsletter 1, Realtor Newsletter 2, etc. When you create the letter, don’t type any text because you never actually print this letter. It is used mainly to help keep track of which newsletter to send. For instructions on creating new letters, see Managing Market Quest Letters.

2. Create a new campaign using the Campaign Manager and label it according to the purpose of the newsletter (e.g., Realtor Newsletters).

3. Select people you want to send the newsletters to for the Target List.

4. For the Letter List, move each empty letter you created (e.g., Realtor Newsletter 1) to the right side of the list and set the number of days between each newsletter.

5. Follow the remaining steps to complete the campaign so that it is Ready.

6. Close the Campaign Manger and click the Print Monitor icon.

7. Highlight the campaign and click the Labels Only button.

8. Market Quests will ask if you want to print labels for the campaign and whether or not you want to track the newsletter sent. Tracking newsletters allows you to view which newsletters a customer or contact received. The Letters icon displays tracked newsletters and other letters sent to each person. The tracked newsletters will also be used in the Market Production Report so you can track your results.
Managing Market Quest Letters

Market Quest and Microsoft Word Interaction

Market Quest controls Microsoft Word when you create, edit, or print Market Quest letters. If Microsoft Word is not already running, Market Quest starts it automatically with the correct setup for a new or existing letter. Once you finish, you must save your changes and exit Microsoft Word. Market Quest will not close it automatically. You must also exit Word before you print letters through Market Quest.

Market Quest Letters

Market Quest letters have three components:

- Letter name
- Microsoft Word document
- Letter type

Letter Name

The Market Quest letter name is used to identify the letter. When you use the letter within Market Quest, you reference it by the letter name, not the actual Word document.

Microsoft Word Document

When you create a letter through Market Quest, it creates a Word document. The document name consists of a letter, seven numbers and three-digit extension, such as l0001322.ms6.

The document does not use standard extensions, such as .DOC because this helps to distinguish between Market Quest letters and other Word documents.

Market Quest links the letter name to the Word document. Although you may edit the Word document directly, we recommend that you always edit letters through Market Quest. That way you are assured that you are editing the correct document.

Letter Type

Each letter has a specific type to identify the kinds of people who will receive it.

Note: Letter Type is very important because it restricts who can receive the letter. For example, if you create a contact-type letter, it will not be available if when you create a customer-type campaign.

- Customers Only
Contacts Only

Customers and Contacts

LC_Contact - This is a special letter type that is used for Loan Cycle processing. These letters are addressed to contacts and reference customer information.

Note: You cannot create LC_Contact of letters with Market Quest and they cannot be used in custom campaigns you create.

Letter Basics

Each Market Quest letter is a Word form letter that contains mail merge fields. You’ll find mail merge fields at the top of letters and sometimes embedded in the body of the letter. When you print the letter, information from Market Quest databases is merged into these fields. You can add other mail merge fields into letters using the Word command called Insert Merge Field.

Many letters reference information found in the Market Quest register screen, such as your company name, work phone number and assistant’s name.

Click the Register icon to view this screen.

Each letter has a merge field called <<M_DEAR>>. This field is the salutation for the letter. When the letter is printed, Market Quest merges the information contained in the Greeting field in the customer or contact record. As you enter customers and contacts, make sure the Greeting field contains the salutation desired when sending letters to that person. Market Quest automatically generates this information, but you can change it if needed.

Market Quest automatically writes your name and title at the bottom of the letter when it is printed. Each letter ends approximately 5 lines after the last sentence so there is room for your signature or scanned image of your signature.

Note: Do not type your name at the end of a letter; otherwise, you will see two names at the bottom of the letters.

Letter Graphics (optional)

Each Market Quest letter contains two graphic files that can be linked to your photo and signature. In order for Market Quest to print signatures and photos in letters, you must have graphic files that conform to a specific standard. These images must be bitmap images and have the extension .BMP. They must also be a certain size otherwise they will not print correctly.

Signature Graphic – It is not required to have a signature graphic image. The signature graphic file can be created using a scanner and photo-imaging software. The size of the image must be 250 pixels wide by 134 pixels high and it must be a bitmap image. The width of the graphic can be larger than 250 pixels. But the height of the image should be 134 pixels. Appendix A contains a template to assist you with scanning signatures.

Photo Graphic – It is not required to have a photo image. You can choose to print only the signature graphic. If you want to print photo images, have your picture taken and save it as a digitized image. You may also need photo-imaging software to resize the image. The digitized image should be 75 pixels wide by 113 pixels high and it must be a bitmap image (.BMP)

Registering graphics in Market Quest

In order to use graphics in Market Quest, you must register them. If you have a Multi-User Enterprise system, you can register photo and signature images for each registered user.

To register graphics:
1. Click the Register icon.
2. Click Get Signature File and then select the appropriate bitmap file.
3. Click Get Photo File and the select the appropriate bitmap file.
4. Repeat for each registered user on the system.

**Editing Letters with Graphic Images**

All Market Quest letters have graphic images links that can be edited.

**To edit a letter with graphics:**

1. First register the graphic files for each user.
2. Click Letter Manager.
3. For Multi-User Enterprise system users, click Graphics and select a sales rep. This user’s graphics will appear in the edited letter.
4. Select a letter and click Edit.
5. If you registered a photo image, it will appear to the right of the merge fields for the name and address. Click next to the `<G_NAME1>` merge field and notice that this area of the letter has two columns.

**To reposition the photo image:**

1. Edit a letter.
2. Click on the photo image.
3. At the top of the screen, you’ll see the Word ruler and left indent marker. It is positioned at the 5-inch mark. Click on the marker, hold the mouse button down and slide the photo left or right as desired.

**Note:** If you want to reposition the photo image for all letters, you must edit each letter.

**To resize the signature image:**

1. Edit a letter.
2. Click the signature image at the bottom of the letter and it will be surrounded by a rectangle.
3. Position the cursor over one of the black rectangles, hold the left mouse button down and drag up or down to resize the image.

**Note:** If you want to resize the signature image for all letters, you must edit each letter and make the change. You may copy and paste the signature image into other letters to save time.

**E-mail Letters**

If you purchased the E-mail marketing module, you receive the basic 78 Market Quest Word letters in e-mail format. Each letter is prefixed with “E-” to help distinguish them from letters that are printed. You can create letters designed for e-mail marketing campaigns. When you create an e-mail letter you need to add an e-mail subject that will be displayed by the recipient’s e-mail program.

When Market Quest sends e-mail letters, it performs a mail merge with Word and writes other information at the end of the e-mail, such as your e-mail address, website address, company name and phone numbers. A number of e-mail options are available that define how this information is displayed. See Setting E-mail Options for more information.
Market Quest supports HTML e-mail. Whatever you can do in Microsoft Word, you can do with Market Quest. However, keep in mind that e-mail letters appear differently depending on how they are viewed with Word.

For more information on e-mail options, see printing letters.

To check the e-mail layout:

1. Edit or create the e-mail letter.
2. In Word, select View / Web Layout. This is how the e-mail will look when it is received in an e-mail program, such as Outlook.

Using the Letter Manager

The Letter Manager is used to manage Market Quest letters. Click the Letter Manager icon.

The Letter Manager has the following features:

- **New** – Create a new letter.
- **Edit** – Edit an existing letter.
- **Import** – Create a Market Quest letter from a Word document.
- **Rename** – Rename a letter.
To create a new letter:

1. Click the Letters icon.
2. Select the type of letters to display, such as English, e-mail, Spanish or All versions.
3. Click New.
4. Select the type of letter to create, such as Customers, Contacts or Customers and Contacts. The type of letter must match the type of person you plan to send the letter to. For example, if you plan to send the letter to customers only, Customer must be selected as the letter type.
5. Enter a unique name for the letter.
6. For an e-mail type letter, enter the e-mail subject.
7. Market Quest opens the new letter with database merge fields for the address portion of the letter.
8. Write the letter and insert any database merge fields desired. **Note:** Do not type your name or title at the end of the letter. Market Quest does this automatically.
9. Save your changes and exit Word.
10. Click Close to exit the Letter Manager.
11. Caution: Don’t use Save As to save the letter to a different Word document. You cannot use this document in Market Quest. (i.e. the Saved As document)

To edit a letter using the Letters List:

- **Delete** – Deletes a letter.
- **Select Graphic** – Used with the Enterprise system to select a graphic signature and photo to be used when you edit a letter.
- **Edit E-mail Subject** – Edit the subject line for an e-mail letter.
- **Get Attachments** – Used to select files to be attached to the e-mail letter whenever it is sent. This can include any file type, such as a PDF, Excel Spreadsheet or Word Document.
- **Get E-Mail Header** – Selects an HTML file that defines the header of an e-mail. Each e-mail letter can have a unique header file.
- **Get E-Mail Signature** – Selects an HTML file that defines the signature of an e-mail. Each e-mail can have a unique signature file.
- **Type** – Displays the type of letter selected.
- **E-Mail Attachments** – Shows the files that will be sent as attachments when it is e-mailed.
- **E-Mail Header** – Displays the file containing the e-mail header information applied to this e-mail.
- **E-Mail Signature** – Displays the file containing the e-mail signature information applied to this e-mail.
1. If the Letters List is not displayed, select View / Lists and Show Letters List.
2. Go to the Customers or Contacts database to show the appropriate letters to edit. For example, when you are in the contacts database, only contact type letters will be shown in the list.
3. Double click on the letter in the list to edit.
4. Market Quest starts Word and opens the letter selected.
5. To edit an additional letter, return to Market Quest’s Letter Manager. You do not need to exit your word processor.
6. When finished editing letters, exit Word before printing letters.

**To edit a letter using the Letters Manager:**

1. Click Letters icon.
2. Select the type of letters to display.
3. Select a letter and click Edit.
4. Market Quest starts Word and opens the letter selected.
5. To edit an additional letter, return to Market Quest’s Letter Manager. You do not need to exit your word processor.
6. When finished editing letters, exit Word before printing letters.

**To import a letter:**

You can create a Market Quest letter from another Word document.

1. Click the Import button.
2. Select the type of letter to create.
3. Enter the name of the letter.
4. Locate the Word document you want to import and select it.
5. The document is inserted into the Market Quest letter and Word is started.
6. Edit the letter as needed and save.
7. Exit Word before importing another letter.

**To rename a letter:**

You may rename any letter.

1. Click the Letter Manager icon.
2. Select the letter and click Rename.
3. Enter a new name and click OK.

**To delete a letter:**

You may delete any letter that is not used in active or ready campaigns.

1. Click the Letter Manager icon.
2. Select the letter and click Delete.
3. The letter name and the word document are deleted.
Customizing Market Quest Letters

Market Quest has several tools which allow you to apply custom changes to all letters. For example, you can change the page margins or insert letterhead graphics for all letters. The following attributes can be applied to all letters:

- **Resize Photo and Signature Graphics** – The height and width of these graphics can be changed.
- **Letter Margins** – You can change the left, right, top, and bottom margins.
- **Number of lines** – The number of lines between the top of the letter and the date merge field can be modified. This is useful to position each letter for windowed envelopes or to fit each letter to your stationery.
- **Letterhead Graphics** – You can select a letterhead graphic and insert it into each letter. The graphic is always positioned at the very top of the letter.
- **Postscript Customization** – This feature gives you the option to apply a postscript (P.S. statement) at the end of each letter below your signature.

Changing the Letter Template

Changes to the letter template are applied to all letters.

1. Before changing the template and updating all Market Quest letters, it is recommended that you first back up your letters.
2. Select Tools / Options and the Printing tab.
3. Click Template Setup.
4. Click Yes if you want to insert a letterhead graphic in all letters. A window displays so you can select the graphic file.
5. Market Quest then opens a template in Word and inserts the letterhead graphic if one was selected. **This template is used to create new Market Quest letters, so it is important that you do not add any text into the template.**
6. To change the photo and signature graphics, click on the graphic and drag it to increase or decrease its size.
7. To change the page margins, select File / Page Setup in Word and modify the margins as needed.
8. To change the number of lines, you can delete or add lines between the top of the page and the field named <<G_date>>.
9. When you are finished customizing the template, exit Word and save your changes.
10. In Market Quest, click Update Letters to apply your changes to all letters.
Adding P.S. Statements

The Postscript Setup screen allows you to specify 4 unique P.S. Statements for your letters. Market Quest adds a Word textbox below your signature. When the letter is printed, Market Quest will insert the P.S. statement into the letter as determined by the options selected below.

To enable P.S. statement processing:

8.

1. Select Tools / Options / Printing.
2. Write Postscript on Letters checkbox.
3. Click Postscript Setup and the screen below displays.

The Postscript Setup screen has the following features:

- **PS1, PS2, PS3, PS4** – Enter unique P.S. statements into the fields. When Market Quest prints a letter, it will insert the appropriate P.S. statement based on the value in the textbox. For example, if the textbox contains PS1, the statement in the PS1 field will be inserted into the letter.

- **Distance Below Signature** – Select the inches below the signature to create the textboxes that contain the P.S. Statement. A good value to select is .5 inches.

- **Postscript Options** – Select the option to be applied to all letters.
  - Create Empty Textboxes – This option creates empty textboxes for all letters. You can then enter P.S. statements directly into each letter as needed. Select this option if you want unique P.S. statements for each letter.
  - Move Existing Textboxes Only – After you create textboxes, you can move them up or down based on the Distance Below Signature value.
  - Set PS1 for All Letters – This option creates textboxes and inserts the word PS1 into them. Use this option to create a default P.S. statement for all letters. If desired, you can edit specific letters and enter a unique P.S. statement or the values PS2, PS3, PS4.
### Setting PS2 for All Letters
- This option creates textboxes and inserts the word PS2 into them. Use this option to create a default P.S. statement for all letters. If desired, you can edit specific letters and enter a unique P.S. statement or the values PS1, PS3, PS4.

### Setting PS3 for All Letters
- This option creates textboxes and inserts the word PS3 into them. Use this option to create a default P.S. statement for all letters. If desired, you can edit specific letters and enter a unique P.S. statement or the values PS1, PS2, PS4.

### Setting PS4 for All Letters
- This option creates textboxes and inserts the word PS4 into them. Use this option to create a default P.S. statement for all letters. If desired, you can edit specific letters and enter a unique P.S. statement or the values PS1, PS2, PS3.

### Update Letters
- Updates all letters based on the Postscript Options and Distance settings.

- **Save** – Save the PS field values.

The example below shows the textbox created below your name and title are placed by Market Quest. When Market Quest prints this letter, it replaces PS1 with the statement entered in the PS1 field in the preference screen.

![Example Letter](image)

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### Inserting Market Quest Fields into Letters

When you print letters, Market Quest commands your word processor to perform a mail merge. This means that data from the Market Quest databases are merged into letters and then printed. You may edit any letter and delete or insert other merge fields to meet your needs. See the section on Market Quest Merge Fields for a complete list of customer and contact merge fields.

**To insert merge fields:**

1. Click the Letters Manager icon and create a new letter or edit an existing one.
2. When the letter displays in Word, place the cursor where you want the field inserted.
3. Click Insert Merge Fields or press ALT + SHIFT + F keys simultaneously to display a list of fields.
4. Double-click on the field or highlight the field and click OK. The field is placed at the location of the cursor.
To delete merge fields:

1. Edit the letter.
2. Select the entire merge field, including the brackets.
3. Press the Backspace or Delete key.

**Note:** Be careful when deleting merge fields. If you don’t delete the entire merge field, you’ll get errors when printing.

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**Writing Temporary Letters**

When you are in the customer or contact database, you can write a temporary letter to the person displayed. Market Quest displays a template with the appropriate merge fields.

**Note:** This feature should only be used to write temporary letters to people. They cannot be used in Market Quest campaigns or other print letter features.

**To write a temporary letter:**

1. Go to the person's record in either the customer or contact record.
2. Select File / Send / Temporary Letter.
3. Market Quest starts Microsoft Word with a special template that has the header merge fields displayed. The templates are called contact.mq1 for contacts and customer.mq1 for customers.
4. In Microsoft Word, Select Tools / Options and click the View tab. Make sure the Field Codes checkbox is unmarked. Then click OK.
5. Return to your temporary letter and click the <<ABC>> button to the right of the Insert Word Field button. This will allow you to view the person's data from Market Quest.
6. Type your letter and then print it through Word. You can insert other Market Quest fields by clicking Insert Merge Field.
7. Exit Word when finished.

**Caution:** When you are finished with your temporary letter, always exit Word. If you don’t, you will get the error: FILE ACCESS DENIED when you:

- Restart Market Quest
- Print campaign letters through Market Quest
- Write another temporary letter

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**View Letter Files**

View Word Processor Files displays a window containing the names of all Market Quest letters and their filenames.

**To view word letter files:**

1. Select File / Administration / View Letter Files.
2. Click to print the list.
3. Click to close.
Printing/Sending Letters and E-Mail

Print and E-Mail Monitor

The Print and E-Mail Monitor searches for letters due to print and displays them in a list. When you print, Market Quest selects the correct letter, determines the person receiving the letter, and then sends commands to Microsoft Word to merge and print, fax or e-mail letters. Once Market Quest prints, it schedules the next letter in the campaign.

When you start Market Quest, the Event Monitor searches for letters due to print and displays the Print Monitor in the list of events that are found. Select Print Monitor and click Select. A list of all campaigns with letters due to print displays.

You can also search for letters to print by clicking the Print Monitor icon.

Print Letters and Labels and Send E-mail

Select a campaign and click Print/Send. Market Quest prints, faxes, or e-mails the letters in the campaign. The print mode (i.e., print, fax, or e-mail) is determined by a number of factors.
After the letters are printed, Market Quest asks if the letters were printed successfully. Click Yes and the campaign is updated and now ready to print labels. Click Print again to print labels for the campaign. Market Quest only prints labels for letters actually printed. No labels will be printed for letters that are faxed or e-mailed.

If the letters don’t print successfully, click No when asked if they printed OK. This allows you to reprint the campaign.

The S button at the top of the Print Monitor determines which is printed first: labels or letters. It is recommended that letters be printed first, then labels. If you print labels first, labels are printed for everyone in the campaign, regardless of the print mode. If you print letters first, labels are not printed for letters that are faxed or e-mailed.

**Selected Printer**

The selected printer shown in the list will be used when you print letters. This is usually your default printer. When you switch to a different printer, Market Quest will use this printer temporarily and then switch back to your default printer. To change your default printer used with Market Quest, select Tools / Options / Printing and select the printer.

**Print/Send All**

1. Click Print All to print all campaigns shown in the list. The processing is the same as with printing individual campaigns described above.

**Note**: Market Quest only prints either all labels or all letters selected.

2. Click the Labels/Letters icon to select Letters or Labels.

3. Click Print All.

4. Market Quest will print all the letters or labels for the items shown.

5. After printing, Market Quest asks if the printing was successful. If you answer No, Market Quest asks if any of the campaigns printed correctly. If you click Yes, Market Quest displays the campaigns printed. You may then move the campaigns that completed successfully to the right side of the window. Click Close and Market Quest updates the campaigns completed. The campaigns that did not print correctly may then be reprinted.

**Reset to Letters**

If the campaign is set to print Labels, Reset to Letters will allow you to print letters again.

**Skip Labels**

This option allows you to skip printing labels for a campaign.

**Labels Only**

The Labels Only button is used to process newsletter-type campaigns. This type of campaign is used to remind you to send a newsletter. Click Labels Only to print labels for the campaign and then record that the newsletters were sent to the people involved.

**Label and Envelope Setup**

The Label Setup feature allows you to select the type of labels or envelopes to print.

**Changing Label Types**

1. Click Label Setup on the Print Monitor screen. You can also select Tools / Options and the Printing tab to access the label setup.

2. Select the type of label from the list. If you want to print envelopes, select the Laser Bus Envelope 9 ½ by 4 1/8.
3. Click Apply.
4. Click Close.

**Printing Envelopes**

1. Click Label Setup on the Print Monitor screen or select Tools / Options and the Printing tab. Click Label Setup.
2. Select Laser Bus Envelope and click Apply.
3. Click Close.

**Editing Labels and Envelopes**

1. Click Label Setup on the Print Monitor screen or select Tools / Options and the Printing tab. Click the Label Setup button.
2. Select the label to edit and click Edit. A report form opens for the label.
3. Click the fields labeled Line 1 through Line 5. Use the arrow keys to move the fields to a new location. You can also use the mouse to drag the fields.
4. Close the form and save changes.

**Caution:** Never delete a field or you will get errors when printing.

**Position Label**

This feature allows you to set the column and row of the starting label position.

**Date Field**

The Print Date field contains the date that will appear on printed letters. Today’s date is the default for the Print Date, but you may enter past or future dates. If you change this date, however, it affects when the next letter in the campaign is due to print.

**To cancel printing:**

Hold the Q key down while printing.

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**Displaying Letters and E-Mail Due**

In the Print and E-mail Monitor screen, click View Letters to display a list of people who will receive letters and e-mail. It also shows the print mode for each letter, such as print, skip, fax, or e-mail. If desired, you can skip letters or e-mail.
To Skip Letters:

1. Select a person or select a group of people by selecting the first person, hold the Shift key down and selecting the last person in the group.
2. Click Skip.
3. You can skip an entire campaign by clicking Select All and then Skip.

**Note:** After changing the print mode, click Close and print the campaign letters immediately. If you select a different campaign, the changes will be lost.

**Other View features:**

- **Loan Status** – For customers only. Displays a Loan Status screen where you can set the items needed to complete a loan.
- **Report** – Generates a list of people for this campaign who will receive letters.
- **Sort By Last Name** – For Loan Cycle Only. Sorts the list by last name. This is useful for skipping multiple letters to the same person.
- **Check** – For e-mail only. Click on a person and click Check to display their e-mail address. You can change it or add a new one.
- **Skipped** – Indicates if an e-mail address is either missing or has an invalid format.

**Previewing E-Mail Before Sending**

Market Quest processes all e-mail and then queues it to send. The screen below shows all e-mail to be sent. You can view the content of each e-mail and select e-mail to be skipped. Unmark checkboxes next to names who you do not want to send e-mail.
The E-mail screen has the following features:

- **Sort** – Click the Name or E-Mail Address column to sort the items in the list. Sorting by E-mail is useful to find duplicate addresses.
- **Select All** – Mark all checkboxes. E-mail is sent if the checkbox is marked.
- **Select None** – Unmark all checkboxes. E-mail is not sent if a checkbox is unmarked.
- **Show Dups** – Show duplicate e-mail addresses and unmark the checkboxes to skip the e-mail. Click the E-Mail column to sort the list by e-mail address and view the duplicates.
- **View E-Mail** – Select a person in the list and click View E-Mail to view the e-mail to be sent.
- **Send E-Mail** – Send all e-mail that have the send checkbox marked.
- **Cancel** – Do not send any e-mail. If you cancel, you will have to reprocess the campaign again through the Print and E-Mail Monitor.

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**Printing/Faxing/E-Mailing Single Letters**

This feature allows you to print, fax or e-mail single letters to customers and contacts. It does not affect active campaigns or the Loan Cycle. When you send a single letter, the person’s notes are updated with the name of the letter sent.

You can print, fax or e-mail single letters from various places in Market Quest:

- Card File View
- Customer and Contact Databases

**To send a letter using drag and drop and the Letters list:**

1. If the Letters list is not showing, select View / Lists and Show Letters List.
2. Go to the contacts or customers database to display the list of appropriate letters.
3. Find the person in the Record list by typing the last name.

4. When the person is found, click on the name in the list, hold the left mouse button down and drag the name to a letter in the Letters list. Let go of the mouse button to begin the printing process.

**To send a letter from the Card File View:**

1. With the Card File View displayed, select a person.
2. Click Print Letter, Fax Letter or Send E-Mail.
3. A list of eligible letters displays. For example, if you are printing a letter to a contact, only contact letters are displayed. If you click E-mail, only e-mail type letters are displayed.
4. Select a letter and click Select.
5. Market Quest commands Word to print, fax or e-mail the letter.
6. The person’s notes are updated with the name of the letter sent.

**To send a letter from the Customer or Contact Database:**

1. Go to the person’s record.
2. Select File / Send / Letter, Fax or E-Mail. You can also right mouse click and make these selections.
3. A list of eligible letters displays. Select a letter and click Select.
4. Market Quest commands Word to print, fax or e-mail the letter.
5. The person’s notes are updated with the name of the letter sent.

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**Communicating with the Related Parties Group**

This feature allows you to send an e-mail or print a letter to everyone involved with the customer or transaction.

Only customer type letters can be emailed to the group. Also everyone in the group will receive the same e-mail or letter. Therefore, letters should be written so they are appropriate for the different types of people involved, such as listing agents, selling agents, sellers, customer, etc.

**To send an e-mail or letter:**

1. Go to the customer record.
2. Select File / Send / Letter or Email to Related Parties.
3. Select the letter or e-mail to send.
4. A list of people involved with the loan is displayed. See below.
5. If you do not want a person to receive the letter, unmark the checkbox.
6. Click Send.
7.
• Select All – Selects everyone in the list.
• Select None – Unmark all checkboxes.
• Send – Send the letter or e-mail to everyone selected.
• Edit – Edit the letter in Word.
• Subject – Edit the subject line of the e-mail to be sent.

Broadcast E-Mail

This feature allows you to e-mail an HTML document to a group of people. Market Quest sends the document “as is” to everyone in the group. It doesn’t perform any mail merges with Microsoft Word and everyone in the group gets the same document.

Before using this feature, perform the e-mail test setup to verify that you can send e-mail through Market Quest successfully. Select Tools / Options and the E-mail tab and perform the e-mail test.

To broadcast an e-mail:

1. If e-mailing customers only or contacts only, go to the appropriate database. If you’re sending e-mail to customers and contacts, you can be in either database.
2. Select File / Send / Broadcast E-mail. An e-mail wizard guides you through the following steps:

Step 1 – Who are you E-mailing?

1. Select the people you want to e-mail: customers only, contacts only or customers and contacts.
2. Click Next

Step 2 – Select Group to E-mail

1. Select the group to e-mail. The group can be all customers or contacts or you can choose Select Group.
   
   **Note:** Only people who have e-mail addresses and whose Mail Status is to Send Letters will be selected.
2. Click Next. If Select Group is chosen, select the query that defines the group to e-mail. For example, if you are e-mailing to contacts, a list of Contact queries is displayed.

**Note:** To verify people in the group before sending a broadcast e-mail, use the Set Group feature for customers or contacts. This will show who will be send the e-mail.

**Step 3 – Select HTML file or Send E-Card**

1. If you are sending an HTML document, click Select File and find the HTML file that will be e-mailed to everyone in your group. The file should have the extension .HTM or .HTML.

2. If you are sending an e-card, click the E-Card checkbox. The checkbox will not show if E-Card Service is not enabled.

3. Click Next.

**Step 4 – Select File Attachments (Optional)**

1. Click Add and select a file to attach to the e-mail. You can add multiple files of any type.

2. Click Next.

**Step 5 – Select Alternate Text File (Optional)**

1. Some e-mail programs cannot display HTML formatted e-mail. You can create a text file that contains a message to display if the e-mail is rejected.

2. Click Select File and select the text file.

3. Click Next.

**Step 6 – Enter E-mail subject**

1. Enter a subject that will appear in the recipient’s e-mail program. This subject will appear in all recipient’s e-mail.

2. Click Next.

**Step 7 – Enter Reply To E-mail address**

1. When a person in the e-mail group replies to the e-mail, it will be returned to this address. This allows you direct all e-mail replies to an assistant or other department.

2. Enter an e-mail address and click Next.

**Step 8 – Broadcast E-mail summary**

1. Verify the information on the summary page.

2. Click Send to send the e-mail to everyone in the group. You can display a list of people who will receive the e-mail. You can also skip people in the list. This is useful if you need to restart the broadcast and skip people who may have already been sent the e-mail.

3. After the e-mail is sent, everyone’s notes will be updated with the name of the e-mail file sent. You may also print a report showing people who received the e-mail.
Printing Labels

There are times when you want to print labels to a group without setting up a campaign and printing letters first. This feature allows you to print labels for any type of mailings, such as sending newsletters, birthday cards or other promotional items. You can print labels from:

- Card File View
- Customers or Contacts database
- Label Wizard

To print labels from the Card File View:
The Card File View is used in various features. For example, it is used to list people who have birthdays coming.

1. Click Print Labels.
2. Select Print All Labels to print everyone displayed in the Card File View.

To print labels to a group:

1. Go to the Contacts or Customers database.
2. Select Group / Set Customer Group or Contact Group depending on which database you are in.
3. Select a query that defines the group.
4. Select File / Print Labels / Customer or Contact Labels.
5. Select Print All Labels to print labels to everyone in the group.

To print labels using the Label Wizard

1. Select File / Print Labels / Label Wizard.
2. Click the types of people for the labels: customers, contacts or both.
3. Click Group to print to a group of people or click All to print to everyone.
4. Select the print order. The company option is only for contact labels.
5. Print labels. You can display a list of people selected before printing. You can also skip people in the list.

Faxing Letters

Market Quest faxes letters automatically to customers and contacts with the use of WinFax PRO. You can even schedule your faxes to go out at a later time. Market Quest controls the entire process for you.

In order to fax letters using Market Quest, you must have successfully installed and tested WinFax PRO, version 8.0 or higher, with Microsoft Word. Follow the WinFax PRO installation guide test procedures and make sure you can fax a letter using Word. If you have difficulties installing WinFax PRO, please contact WinFax PRO technical support. Market Focus, Inc. technical support cannot help you with any WinFax PRO installation problems.

When Market Quest faxes letters, it uses your word processor to perform the mail merge with the appropriate letter and the receiving person. It then sends the merged document to WinFax PRO, which schedules the fax in the Outbox. The time the letters are actually transmitted is determined by the options selected in the Faxing Options screen. WinFax PRO controls the faxing process and will...
update the Send Log with the status of each faxed letter. See Customizing Market Quest for more information on Faxing options.

**Entering Fax Numbers**

In order to fax letters, you must enter valid fax numbers into the customers and contacts database. Also, Market Quest has to know when to use the long distance and area code prefixes.

If the area code in the fax number matches the Fax Setup Local Area Code or it is empty, it is considered a local call and Market Quest will not add the long distance prefix or the area code.

If the area code is different from the Fax Setup Local Area Code, it is considered a long distance call. In this case, Market Quest will add the long distance prefix and the area code to the number when faxing.

**Note:** In some cities, local calls may have the same area code as long distance calls. You have to know when to dial a 1 and the local area code. To handle this situation, don't enter a Local Area Code in the Fax Setup screen. Enter the area code in the fax number only when you need to dial it. Market Quest will consider it a long distance number and will use the long distance prefix and the area code.

Another special case involves areas where you have to dial a 1 and the local number with no area code (e.g., 1-536-9090). In this case, enter a 1 in the area code and Market Quest will dial the 1 and the local number.

**Faxing Campaign Letters**

1. Create the campaign using the Campaign Manager.
2. When letters are due to print, select the Print Monitor.
3. Select the campaign and click View Letters.
4. Change the print mode from Letters to Fax for the letters you want faxed.
5. Close and then click Print.
Monitoring Events

Event Monitor

Every time you start Market Quest, the Event Monitor checks for all the events that are due that day. Events can be letters to print, expired dates, or a notification that the current interest rate is less than or equal to the customer's desired interest. A date expires when it is before or equal to today's date.

Monitoring Custom Events

You can define your own monitor event fields to remind you of important dates you want to track. When you define a monitor field, Market Quest will notify you when it contains a date that is expired (i.e., equal to or earlier than today's date).

See Defining Custom fields for more information.

To view a list of people with expired dates:

1. Click the Monitor Event icon.
2. Highlight the name of the event.
3. Click Select.
4. The Card File View displays a list of people with expired dates.
5. Custom events will continue to be displayed until you clear the field or enter a new date in the future.
6. Click Reset Event to clear or set a new date in the future.
7. Click Close.

**Monitoring Predefined Events**

Market Quest has several monitored fields in the customers and contacts database. When these dates expire, Market Quest will display the names of the people in the Card File View. The following fields are monitored, each in slightly different ways.

**Event Fields**

- Anniversaries (customers and contacts)
- Birthdays (customer and co-customer, contact, spouse and children)
- Holiday and Seasonal E-Cards (Monthly Service)

**Birthday and Anniversary Events**

Birthdays and anniversaries can be displayed before the actual date in order to give you time to send cards. You can set the number of days before the event you want to be reminded. Select the Tools / Options and the Events tab.

Birthday and anniversary events will only be displayed for a short period of time. They will not display when the date in the field is less than today's date. You'll need to reset birthdays and anniversaries to the next year; otherwise, they will not show up the following year. When you reset birthdays, the age is advanced 1 year.

To reset birthdays, select Tools / Reset Birthdays.

**Holiday and Seasonal E-Card Events**

When the E-Card service is enabled, Market Quest will remind you when it's time to send the appropriate e-card to your users. When the event is selected, the Broadcast E-mail Wizard is displayed to e-mail the e-card.

**Resetting Events**

The customer and contact events can be reset from a number of places in Market Quest.

- The Event Monitor screen has a Reset All button. Select the event and click Reset All to reset all events.
- The Card File View screen has a Reset Event button. Select the person in the list and click Reset Event to reset the date.
Customizing Market Quest

Selecting Options

Market Quest has many options that allow you to determine how various features work. Select Tools / Options to display the options screen.

General Options

General options allow you to customize data entry, styles, and general features.

![Options Screen](image)

**Capitalize Names**

If marked, the first letter of names, companies, and cities will be capitalized automatically. This allows you to enter data without worrying about capitalization.
When entering customer and contact last names, the auto-capitalize feature correctly capitalizes names beginning with Mc, Mac, and O’, such as McDonald, MacDonald, and O’Neal. Hyphenated last names are also capitalized correctly, such as Bently-Smith.

When entering company names, such as ABC Realtors, the ABC is not capitalized. Market Quest will not capitalize any part of a company name that is 3 characters or less. In these cases, you need to provide the correct capitalization.

**Note**: If Market Quest doesn’t capitalize a name correctly, press Tab to exit the field. Then click into the field and capitalize the name as needed. Click Save to save the changes.

**Automatic Zip Code**

If marked, the city and state information will be inserted automatically after entering a zip code. If the zip code is not in the zip code list, you will be asked to add the new zip code to the list.

**Search Company Name**

If marked, Market Quest searches a company name list as you enter a company name for a new contact record. As you type, matching companies appear and it fills in the address information.

**Hide Unused Custom Fields**

If marked, all unlabeled custom fields on the Custom screen are hidden. This applies to both customer and contact databases.

**Hide Unused Interest Fields**

If marked, all unlabeled interest fields on the Interests screen are hidden. This applies to both customer and contact databases.

**Show Field and Item Help**

If marked, Market Quest displays messages when you place the cursor over fields and other items, such as buttons, icons, etc.

**Stationery Cost**

Cost of one letter and envelope. This value is used to calculate the mailing costs for the Market Production Report.

**Postage**

Cost of mailing a letter. This value is used to calculate the mailing costs for the Market Production Report.

**On Startup**

When Market Quest starts, this option determines which database is displayed first. Values include:

- Show Last Used – Displays the last database you were in when you exited the program.
- Show Customers First – Displays the Customers database on startup.
- Show Contacts First – Displays the Contacts database on startup.

**Events Options**

Events Options allow you to specify which events you want to monitor and how many days to be reminded before the actual date expires. You can improve Market Quest performance by marking only events you want monitored.
General Events

- **Contact and Customer Birthdays** - Mark if you want to monitor birthdays of contacts and customers.

- **Spouses' Birthdays** - Mark if you want to monitor birthdays of spouses.

- **Children's Birthdays** - Mark if you want to monitor birthdays of children.

- **Anniversaries** - Mark if you want to monitor Customer and Contact anniversaries.

- **Track Letters to Print** - Mark if you want Market Quest to track when letters are due to print. This should always be marked unless you don't print any letters.

- **Check Events on Startup** – Mark if you want Market Quest to search for all events every time it is started. Unmarking this checkbox improves startup performance. If you unmark this checkbox, click the Event Monitor icon when you want to search events.

- **Check Letters on Startup** – Mark if you want Market Quest to search for letters due to print every time it is started. Unmarking this checkbox improves startup performance. If you unmark this checkbox, click the Print Monitor icon when you want to search for letters due to print.
• **Days before Birthdays and Anniv.** – The number of days you want to be reminded before all birthdays and anniversaries.

• **Reset Birthday Events** – Resets all birthday events to the current year. If you do not reset birthdays, they do not display for the next year. This feature creates birthday events for the current year so you can be notified when its time to send a card.

### Printing Options

The Printing options control how Market Quest prints letters and envelopes.

#### Print Labels or Envelopes

If marked, Market Quest prompts you to print labels after printing letters. If you do not want to use labels, unmark this checkbox.

#### Print Name Prefix

If marked, prefixes such as Mr., Mrs. and Ms. will be printed with your name at the bottom of letters. Market Quest uses prefix information from the user registration screen.

#### No Duplicate Labels

If marked, Market Quest eliminates duplicate labels to the same person.

#### Print Title on Letters

If marked, your title will be printed on letters. Market Quest uses the title entered in the User Registration screen.

#### Print Mail Code on Labels

If marked, a mail code that identifies a sales rep is printed on each label. This is useful when printing mailing labels for postcards or newsletters that contain sales rep information, such as pictures, names, etc. The code helps you identify that a person’s address correlates with specific sales reps.
This option is only applicable with multi-user systems.

**Remove + 4 Part of Zipcode**

If marked, the 4 digit zipcode extension is removed from letters, envelopes and labels.

**Contact Labels**

Specifies the style for printing labels to contacts:

- Company Name First.
- Company Name Second.

**Pause for Stationery Change**

This option is only valid for the Multi-User Enterprise system. Market Quest prints letters in sales rep order. If marked, Market Quest will pause after each group of sales rep letters print. This allows you to load custom stationery for each sales rep.

**Write Postscript on Letters**

Market Quest writes postscript statements at the end of letters when this option is marked. See Customizing Market Quest letters for more information.

**Greeting Style**

This option allows you to choose between formal and informal greeting styles. The formal style uses the name prefix and the person’s last name. The informal style uses only the person’s first name.

- Formal: Dear Mr. Dwyer:
- Informal: Dear Gary:

**Label Style**

This option allows you to choose between formal and informal label styles. The formal style uses the name prefix. The informal style does not use the name prefix.

- Formal: Mr. Gary Dwyer
- Informal: Gary Dwyer

**Normally Used Printer**

Select the printer you use to print letter and labels.

**Use Microsoft Word Envelope**

If marked, Market Quest uses the Microsoft Word envelope template for printing envelopes.

**Print Return Address on Word Envelope**

If marked, Market Quest prints a return address on envelopes. If your envelope has a preprinted return address, unmark this option.

**Edit Word Envelope**

This feature starts Microsoft Word and displays the envelope template used to print envelopes. You can change fonts, and other printer specific aspects of the envelope, such as tray selection, orientation and size.

**Template Setup**

This option displays a letter template in Word so you can make changes to the margins, graphics and other common values. When you are finished, close Word and click Update Letters. Please see the section on Customizing Market Quest Letters for more information.

**Update Letters**
Market Quest reads the values in the template file and applies those values to all letters.

**Postscript Setup**

This option controls how you apply up to 4 different P.S. statements to your letters. Please see the section on Customizing Market Quest Letters for more information.

**Reschedule Letters**

The maximum number of letters that can be queued to print for one campaign is approximately 2300. This option allows you to set the number of letters to print today to below this value. The letters not printed will be rescheduled to the next day. You can also use this feature to reduce the number of letters you want to print for any campaign. For example, if a campaign has 1000 letters due to print and you only want to print 400, click Reschedule Letters and enter 400. Market Quest reschedules 600 letters for the next day and brings the total to print today to 400.

**Reinstall Letters**

This feature reinstall the standard letters and e-mail.

**Label Setup**

This option allows you to change the style of label or envelope. See Printing Letters and Labels for more information.

**E-Mail Options**

When Market Quest sends e-mail, it writes optional information at the bottom of the e-mail, such as your e-mail and web site addresses. The e-mail options specify which information to include as well as what subject line to write for status letters.

**Company Name**

Include the company name at the end of all e-mail.
Office Phone Number
Include the office phone number at the end of all e-mail.

Fax Number
Include the fax number at the end of all e-mail.

Pager
Include the pager number at the end of all e-mail.

Cell Phone Number
Include the cell phone number at the end of all e-mail.

E-Mail Address
Include the sales rep e-mail address at the end of all e-mail.

Sales Rep Website URL
Include website URL at the end of all e-mail.

Set Same Options
Set the same e-mail ending options for all users in a Multi-User Enterprise system.

Use E-Mail PS Line
Add a P.S. type of tag line after the sales rep information. Enter the tag line information into Tag Line field.

Put First Name in E-Mail Subject
If marked, Market Quest puts the e-mail recipient’s first name in the subject line (e.g., “Joe, Your Loan has been Approved!”)

Show Subjects
List all e-mail letters and subjects.

Set E-mail Ending Labels
This option allows you to set e-mail labels which appear at the end of all e-mail. For example, if “Office:” is in the field, the e-mail ending will include the label Office: and then the phone number. (e.g., Office: 888-788-8877).

Note: Do not enter actual information in the field, such as your company name.
### Get E-Mail File

Market Quest can use separate HTML files, which can contain graphics, links and other information, with its standard e-mail. When you select a header or signature file, Market Quest inserts the HTML files at the beginning and ending of the e-mail. If you have e-mail stationery, Market Quest inserts the letter content at specific HTML tags. Market Focus must set up your stationery to be used with Market Quest letters. A set-up fee may be required.

### Clear E-Mail File

Clear the HTML file selected.

### View E-Mail Files

View the HTML files selected.

### Select User

In a Multi-User Enterprise system, select a user to set individual e-mail options.
E-Mail Setup

![E-Mail Setup dialog box]

E-Mail Address
Enter your e-mail address.

SMTP Server
Enter the SMTP Mail Server.

Port Number
Leave the Port Number at 25, unless you know the mail server requires a different number.

Timeout
SMTP timeout value.

E-Mail Wait
Wait this number of seconds between sending consecutive e-mail. This is useful for throttling e-mail.

Mail Server Requires Authentication
Mark this checkbox if your mail server requires authentication.
- User Name – Mail server user name
- Password – Mail server password
- Authentication Mode – Select the Authentication mode. The most common mode is AUTH LOGIN. If the e-mail test fails, try the CRAM-MD5 mode

Use Outlook for Temporary E-Mail
Use the default Outlook editor when sending temporary e-mail.

Log E-Mail Events
This option is used for analyzing problems with sending e-mail through Market Quest’s SMTP utility.
Send E-Mail to Outlook

Market Quest sends all e-mail to either the Outlook Outbox or in some cases the Outlook Drafts folder, depending on the Outlook options selected. If the option to hold e-mail is selected in Outlook, you may have to click the Outlook Send / Receive button to actually send the e-mail.

Don't Save E-Mail

When this option is marked, Market Quest creates a copy of all e-mail sent and links them with the customer or contact record. This is useful for creating a history of e-mail sent to people.

Don't Move from Drafts Folder

If Send E-Mail to Outlook is marked, Market Quest sends e-mail through Outlook to the default folder for Unsent e-mail. If Outlook is configured to save Unsent e-mail in the Drafts folder, Market Quest normally will move the e-mail from the Drafts folder to the Sent Folder. If this option is marked, e-mail will remain in the Drafts folder.

Use SSL E-Mail Server

If your e-mail server requires SSL capabilities, mark this checkbox. Yahoo, Gmail and Hotmail e-mail services require SSL.

Send Test E-mail

This button tests the e-mail mail server. It tries to send a test e-mail to Market Focus using the Mail Server information entered above. You must also enter your e-mail address in the User Registration screen.

Show Log

Show the SMTP event log for analyzing errors.

Faxing Options

When Market Quest faxes letters, it uses various options to control Winfax Pro, such as scheduling information.

Enable Faxing

Mark this checkbox to enable faxing.
Fax Driver Used
Select the Winfax Pro driver from the list. This is usually [Winfax].

Outside Line Number
If you need to dial an extra number to get an outside line, (e.g., 9) enter that number, followed by a comma. The comma is a pause command and is required. You may enter multiple commas if you telephone system requires longer pauses to dial through your modem.

Long Distance Prefix
Enter the long distance prefix number needed to make long distance calls. This is usually a 1.

Local Area Code
Enter your local area code, which is used to determine when to apply the long distance prefix.

Schedule Fax Time
There are two methods for scheduling faxes. You can schedule faxes at a specific time of day or after printing letters. Market Quest sends this information to Winfax Pro, which will schedule the faxes in its Outbox.

Time of Day Scheduling – enter the time of day to schedule such as 11:00 PM. Use the buttons to advance or decrease the time.

After Printing Schedule – Clear any Time of Day schedule values and enter the number of minutes to wait after the letter is printed. The main purpose of this value is to prevent Winfax from starting to fax letters before Market Quest is finished processing all letters. If you are printing and faxing a large number of letters, this number should be high, such as 30 or longer.

Outlook Options
These options control how Market Quest interacts with Microsoft Outlook.
Use Outlook
If marked, Market Quest will update Outlook records.

Show Linked Tasks and Appts.
If marked, Market Quest will read Outlook linked appointments task information and display the items in the customer and contact Notes screen. Program performance may be improved if this option is unmarked.

Enable Events
When Outlook Events are enabled, any changes to Outlook contacts, appointments and tasks that are linked to Market Quest records will be updated automatically.

Automatic Create
When Automatic Create is enabled, an Outlook record is automatically created when a new Market Quest record is entered. If this is unmarked, you must use the Record / Send to /Microsoft Outlook to create a new record. Once a Market Quest record is created in Outlook, it will be updated when information changes.

Open at Start Up
When this option is marked, Market Quest starts Outlook as part of its start up process. If you are using Vista, Outlook must be started along with Market Quest.

Permanently Delete from Outlook
You can delete an Outlook task or appointment displayed in Market Quest. If this option is unmarked, the deleted item stays in the Deleted Items folder. If this option is marked, the item is also deleted from the Deleted Items folder (Recommended).

Create Outlook Birthdays
If marked, create Outlook birthday events from Market Quest’s birthday fields. Only the main Customer and Contact birthdays can be created in Outlook.

**Map Outlook Folders**
With Outlook you can create other personal folders for contacts, tasks and the calendar. This feature allows you to select which folders Market Quest will use to synchronize data.

**Note:** If you plan to use reminders with Outlook tasks, leave the Task folder set to Default. Outlook does not support reminders in other personal folders.

**Synchronization Report**
This report is useful for checking the links between Market Quest and Outlook records.

**Clear Outlook Birthdays**
Removes all birthday events created in Outlook from Market Quest birthday fields.

**Clear Outlook Links**
Market Quest tracks links between customer and contact records and the Outlook records in the Contacts folder. Clear Outlook Links clears these links. The links are reestablished the next time you sync with Outlook.

**Clear Deleted Items Folder**
Removes all items in the Outlook Deleted Items folder.

**View Log**
The log tracks Outlook errors that may have occurred.

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**Defining Custom Fields**

Market Quest allows you to define your own fields for customer and contact records. There are three types of fields you can define: General, Merge, and Monitor fields. The General and Merge fields are list type fields.

- **General fields** contain any information about customers or contacts.
- **Merge fields** contain information that can be merged into letters. They also can be used as general fields.
- **Monitor fields** are date fields that can be tracked by the Event Monitor. When Market Quest starts, these fields are searched. When a date matches or is less than the current date, the field title will appear in the Event Monitor window.

**To define a custom field:**

1. Go to the Customers or Contacts database.
2. Click the Custom tab.
3. Click to the left of a field you wish to define.
4. Enter the name of the field.
5. Click in the field and enter any information, such as number, characters or dates and press the tab key to add to the list.
Customizing Lists

You can modify the information that appears in many lists. A list speeds data entry because you select an item from a list instead of typing it into a field. You can add, delete, and rename items in lists.

Many of the lists used in Market Quest have automatic add and delete features. To add an item in a list, place the cursor in a list. Enter a new item and press Tab. The new item will be added to the list. If you can’t place your cursor in the list, it means that you cannot add items. It is a select only list.

To delete an item, select the item from a list and then double click on the item.

To customize lists:

1. Select Tools / Modify Lists / Customers Lists or Contacts Lists.
2. Select a list to modify from the pull-down menu at the top of the screen. The items for each list are then displayed.
3. You can then add, rename and delete items for a list.
Market Quest Tools

Backing Up and Restoring Market Quest Data

Backup and Restore provides the means for protecting the information stored in your databases. It is important to make backups of Market Quest frequently. The frequency of your backups depends on how many changes you make. We recommend that you back up your database at least once a week. If you make many changes, you should back up more frequently.

Market Quest provides several methods for backing up and restoring your data. You can back up and restore the following types of data, which uses the following files:

- Customer and Contact databases (MQDATA.ZIP)
- Reports (MQREPORTS.ZIP)
- Letters (MQLETTERS.ZIP)
- Backup for Merging (MQMERGE.ZIP)

Market Quest also has a special feature for moving data between two computers called Backup for Merging. This option allows you to back up Market Quest data on one computer and merge the data to a different computer. The difference between the Backup for Merge and a normal backup is that the regular backup replaces all data, whereas the Backup for Merge changes only the data in customer and contact records that were added or modified.
To back up Market Quest data:

When you backup, Market Quest compresses the information into a single file and copies it to the location you choose. You can back up to diskette, hard drive or a zip drive. It also creates an archive copy in the c:/program files/market focus/market quest/backup/archive folder.

1. Select File / Back Up Data To and one of the following locations:
   - Floppy A – diskette.
   - Local Folder – market focus/market quest/backup folder.
   - Browse – Select a folder for backup.
   - Secured Internet Storage – uploads encrypted backup file to an internet site.

2. Select the type of data to back up:
   - User Data
   - Reports
   - Letters
   - Spanish Letters

3. If you selected to Floppy A, a checkbox named Make Copy is displayed. If marked, a copy of the back up is created in the local folder also.


To restore Market Quest data:

Restoring data replaces your current Market Quest data. You should only restore your current databases if they are damaged and you need to recover previous data, or if you want to copy all Market Quest data to a secondary system (e.g., laptop computer).

1. Select File / Restore Data From and one of the following locations:
   - Floppy A – diskette.
   - Local Folder – market focus/market quest/backup folder.
   - Browse – Select a folder for backup
   - Secured Internet Storage – Restores encrypted backup file from the internet site.

2. Select the type of data restore:
   - User Data
   - Reports
   - Letters
   - Spanish Letters

3. Click Restore. After the data is restored, Market Quest updates the tables to ensure they are current.

Synchronizing Data – Backup for Merging

Back Up for Merging is designed to merge information from one computer to another. It should not be used in place of normal backups because it only uses customers and contacts data. It does not back up other important information, such as campaigns, referrals, assignments, etc.
Select File / Synchronize / Back Up Data for Merging and one of the following locations. It creates a file called MQMERGE.ZIP.

Select File / Synchronize / Merge Data From and one of the following locations to perform the merge.

- Floppy A – diskette.
- Local Folder – market focus/market quest/backup folder.
- Browse – Select a folder for backup.
- Secured Internet Storage – uploads encrypted merge file to an internet site.

**Synchronizing Data – Merge Data**

The Merge Data feature allows you to merge customer and contact data from a Back Up for Merging file (MQMERGE.ZIP). This allows you to work at home and then merge customer and contact data back at the office.

The following procedure illustrates how to manage two different Market Quest programs on two different computers.

1. Start by making a regular backup of your Market Quest data.
2. Install Market Quest on your second computer system and use the Restore command to load all data you backed up in step 1.
3. You can use your second computer system to add or modify contact and customer data.
4. Perform a Back Up for Merge on your second computer system to diskette.
5. Go to your first Market Quest program.
6. Perform Merge Data.

**Note:** The Synchronize Data feature only merges customer and contact records that were last changed or added. If you use any other Market Quest feature, such as creating, modifying or printing campaigns, letters, reports, etc, these changes are not synchronized.

If you want to use all of Market Quest’s features on two different computers, we recommend that you do the following so that both Market Quests will contain the same data:

1. Back up User Data on computer 1.
2. Restore this back up on computer 2.
3. Use computer 2 as needed. When finished, back up User Data.
4. Restore the User Data on computer 1.

**Administration Tools**

The administration tools help you manage the Market Quest system, such as user registration, installing letters and other add-on modules.

**View User Registration – Single User Version**

The User Registration screen contains information about the registered Market Quest user on a single or team system. You can change any information except the first and last name.
To display the User Registration screen:

Select File / Administration / View User Registration or click.

The following are key fields and functions:

- **Company** – Used in the shopping campaign letters.
- **E-Mail** – Required when sending e-mail.
- **Set Password** – Set the password used to log in to Market Quest.
- **Get Signature File** – Select a scanned image file of your signature. Optional.
- **Get Photo File** – Select a digitized image file of your photo. Optional.

**View User Registration – Multi-User Version**

The User Registration screen contains information about multiple Market Quest users on the Multi-User Enterprise System. Each registered user has a registration screen where their information is stored. There are also features for adding and removing users.

A user must have the Market Quest System Administrator Option marked to access these multi-user options.
To display the User Registration screen:

Select File / Administration / View User Registration or click ↩.

You can change any information except the first and last name, and the company name.

The following are key fields and functions:

- **E-Mail** – All users must have an e-mail address in order to e-mail letters.
- **Password** – This is optional.
- **Get Signature File** – Select a user first and then select a scanned image file for each user. Optional.
- **Get Photo File** – Select a user first and then select a digitized image file for each user. Optional.

To change user information:

1. Select File / Administration / View User Registration or click ↩.
2. Select a user from the User list at the bottom right.
3. Change the desired information and click Save.

To add new users:

1. Display the User Registration screen.
2. Click Add New User.
3. Insert the Enterprise System Registration Disk and click OK.
4. Enter first and last name and other pertinent information.
5. Press Save when you finish entering data.
6. A warning appears to make sure that the name entered is spelled and punctuated correctly. Click OK.
7. The name cannot be changed once you register it, so it is important to make sure it is correct!
8. After the user is registered, the sales rep's name appears in the names list.

To remove users:

1. Display the User Registration screen.
2. Select the person to remove from the list of users.
3. Click Remove User.
4. Insert the Enterprise System Registration Disk and click OK.
5. If there are customer and contact records assigned to the removed user, the following message displays: “There are unassigned records. Assign a sales rep?” Click Yes to display a list of sales reps. Select a person from the list and click Select. All customer and contact records that were assigned to the removed sales rep are assigned to the person you selected.
6. Click No to postpone assigning these records to a sales rep. However, you will not be able to print until you assign a sales rep to all unassigned customers and contacts. If desired, you may enter the customer and contact databases and assign different sales reps to these unassigned records one at a time. This is done by selecting a loan office in the list of owners.

To increase maximum users:

The Increase feature allows you to increase the maximum number of licensed sales reps that can be added to Market Quest. The maximum number of licensed sales reps is 150. You can add sales reps one at a time for up to 15 sales reps, and then in blocks of 5 users for up to 150 sales reps.

1. Call Market Focus to order an increase in the number of licensed sales reps. Market Focus will process your order and issue you a new authorization number.
2. Start Market Quest and display the user registration screen.
3. Click Increase Users.
4. Enter the number received from Market Focus, Inc. into the screen and click OK.
5. Insert Enterprise System Registration Disk and press OK.
6. Use the Add New User feature to add sales reps.

Market Quest Teams

You can organize Market Quest users into different teams. When you create teams, a user can be designated to view all team members’ data. The Team Manager provides the features to manage and create teams. See the Organizing Users into Teams section for more information on creating teams.

To create a team:

1. Click Team Manager.
2. Move users into the team list.
3. Designate at least one person to view all other team member’s data.
4. Close and name the team.

Market Quest User Options
Each user can be assigned different options, which gives them permission to access various Market Quest features. The following options are available:

- **Access to All Users** – Mark this if you want a person to see all sales reps’ data. If unmarked, a person can only view his or her own data.
- **System Administrator** – Mark this if you want a person to have access to all critical management functions, such as Adding and removing users, changing passwords, backing up data, etc.
- **Access to All Team Users** – Mark this if you want a person to have access to all team users’ data. This option has no effect if the user is not a member of a team.
- **Access to All Letters** – Mark this if you want a person to have access to all basic Market Quest letters. Since these are common letters used by all users, you don’t want everyone editing them. If unmarked, users can create letters for their own marketing needs.

**To set user options:**

1. Select a user from the list and click User Options.
2. Mark the Options and click OK to save.

**Change Password**

This feature displays the user registration screen that contains the password field. Enter the password and click save.

Select File / Administration / Change Password.

**View System Information**

This feature displays system information for diagnostic purposes, such as where other programs are installed and different system resources.

Select File / Administration / View System Information.

**View Installed Modules and Letters**

This feature displays the Market Quest add-on modules and letters that are installed.

Select File / Administration / View Installed Modules and Letters.

**View Letter Files**

This feature displays the Market Quest letter name and the corresponding Microsoft Word document file.

Select File / Administration / View Letter Files.

**Install Marketing Letters**

This feature registers and installs add-on campaign letters purchased from Market Focus. An installation wizard guides you through the follow steps. You need a letters zip file and a password before you can register letters.

Select File / Administration / Install Marketing Letters.
Install Add-on Modules
This feature registers and installs add-on modules purchased from Market Focus.
1. Select File / Administration / Register Modules.
2. Enter the module password.

Add/Delete Users
If you are using the Multi-User Enterprise system and have system administrator privileges, this feature displays the User Registration screen for adding and removing users from the system. See View Registration for more information.

Repair Databases
Windows is notorious for corrupting database files and damaging data. This can happen if Windows freezes, you experience a power interruption, or if you restart the computer while Market Quest is running. Market Quest has a repair utility for correcting many of these problems, such as "Not a database" and "Index doesn't match table" error messages. The repair utility also checks for invalid data in important databases that can cause other problems in Market Quest, such as the "End of File Encountered" or subscript out of range message.

To run the Repair Databases:
1. Select File / Repair Databases.
2. Market Quest first analyzes all databases for damage and checks for invalid data.

If you can't start Market Quest:
If you cannot start Market Quest without errors, run a check databases program from the Windows Program menu.
1. Select Start / Programs / Market Focus / Check Databases.
2. After the Check program completes, start Market Quest. If you still can't start Market Quest, try running the Check Databases program again. After several tries, call Technical Support because you may have to reinstall Market Quest.

Note: If an error occurs while running the Repair or Check Databases program, select the Ignore option whenever it is displayed. If a File Open Window appears and prompts you to select a table, select Cancel. Rerun the Repair program until it completes without errors. Call Technical Support if the Repair Databases program doesn't resolve the problem.

Change Area Codes
This tool allows you to change area codes for customer and contact telephone numbers.

To change area codes:
1. Select Tools / Change Area Codes.
2. Enter the old area code to change.
3. Enter the new area code.
4. Click Change. Market Quest replaces the old area code with the new one entered.

### Creating Greeting Fields

This feature creates new greeting fields for all customers or contacts. Its main purpose is to switch greeting styles or to create the greeting fields after data has been imported.

**To create greeting fields:**

1. Select Tools / Create Greeting Fields.
2. Market Quest analyzes every record and creates the greetings field according to the preferences set for Greeting Style.

### Capitalize Fields

This feature allows you to apply correct capitalization to name, company and address fields for the customer and contact databases. Its main purpose is to correct important fields that may contain all upper case letters.

**To apply capitalization:**

2. Market Quest will apply the correct capitalization to name, company and address fields.

### System Information

This window shows information about your system. From Market Quest's main menu select File / Administration / View System Registration.

### Exporting Customers and Contacts

Market Quest allows you to export customer and contact information to data files in various formats. Typically, you export data to a file that is then imported and used in a different program, such as Excel or a loan processing system. You can select any Market Quest database field to export, including custom fields. However, you cannot export customer or contact notes.

**To create an export report:**

1. Select File / Export.
2. Select the type of data to export:
   - Customers.
   - Contacts.
   - Customers and contacts.
3. Select an existing query or create a new query that will select records to export.
5. Double click on the fields in the left list to move them to the right list. Click Close when finished.

6. Click Pick Output Type and select type of file to create, such as text with comma-separated fields.

7. Enter the file name that will contain the exported data. The default is QMF_TEMP. Don’t enter a file extension because this is added by Market Quest based on the file type selected.

8. Click Close.

9. Click Run Query to export the data to the file name. Market Quest exports the data to the installation location, such as c:/program files/market focus/market quest.

**To edit an export report:**

1. Click Reports / Report Queries.

2. Select the type of data to export:
   - Customers.
   - Contacts.
   - Customers and contacts.

3. Select query used to export the data.

4. Click Report. You can change the following components:
   - Query
   - Output type
   - Exported fields
   - Sort order

5. Click Run Query to export the data.

**To run an export report:**

1. Click Reports / Report Queries.

2. Select the type of data to export:
   - Customers.
   - Contacts.
   - Customers and contacts.

3. Select query used to export the data.


5. Click Run Query.
Multi-User Enterprise System

Introduction

The Multi-User Enterprise system makes it possible for a branch office to coordinate all marketing and customer service activities through one integrated program. This gives your entire office the competitive advantage to increase business and provide exceptional customer service. With all the powerful features of the single user version, the multi-user program is designed for a local area network. However, if you don’t have a network, the program can be used on a standalone computer where an assistant can coordinate marketing activities for all sales reps.

The Multi-User Enterprise system has the following benefits:

**Coordinates Marketing**

Since all data is contained in one database, it’s easy to create marketing campaigns for all sales reps. When Market Quest prints letters, it sorts by sales rep and writes the name of the sales rep on the letter. It can also select the sales rep’s scanned signature and photo if available. This dramatically improves productivity and increases profits because sales reps will have more time to generate business and service customers more efficiently.

**Simplifies Sales Management**

The Multi-User Enterprise system contains a centralized database for all sales reps, allowing you to track your business more effectively. You can run reports on all data to get the big picture or create reports by individual sales rep. Everything you need to know about your sales activity is in one central location.

**Improves Quality Control**

Market Quest has many features, which can be customized to meet your particular needs. For example, you can edit or create marketing letters and reports. Market Quest Multi-User version improves quality because once these modifications are made, they can be used by all sales reps. Now you can be sure that all customer correspondence is of the highest quality and is used consistently by all sales reps.

Multi-User Features

**Administration**

There are features available for adding and removing users to the system, as well as giving users system privileges. See View User Registration – Multi-User version for more information on these functions.
Logon and Passwords

When users start Market Quest, they select their name from a list of registered users and enter a password. Initially, the password is blank.

To change a password:

1. Select File / Administration / View User Registration or click the icon.
2. Select a user from the list at the bottom right side of the screen.
3. Click User Options.
4. Enter or change the password.
5. Click OK.

Network Features

A Network menu option provides the following functions:

Show Users Logged On
Display a list of people logged on.

Show Record Locks
Display a list of record locks set by other users. This feature is useful to see who has records locked or performing other features that are blocking you from performing a certain task.

View User Options
Display user privileges.

Set User View
Available only if user has Access to All Users privilege. View all data or the data of the user logged on.

Switch Users
Available only if user has Access to All Users privilege. View the data of another user.

Switch Team
Available only if the user is a member of multiple teams and has Access to All Team Users privilege. This option allows user to switch team views.

Show Team Members
Available only if the user has Access to All Team Users privilege.

User Options

Each user can be assigned different options, which gives them permission to access various Market Quest features. The following options are available:

- **Access to All Users** – Mark this if you want a person to see all sales rep’s data. If unmarked, a person can only view his or her data.

- **System Administrator** – Mark this if you want a person to have access to all critical management functions, such as adding and removing users, changing passwords, backing up data, etc.
• **Access to All Team Users** – Mark this if you want a person to have access to all team users’ data. This option has no effect if the user is not a member of a team.

• **Access to All Letters** – Mark this if you want a person to have access to all basic Market Quest letters. Since these are common letters used by all users, you don’t want everyone editing them. If unmarked, users can create letters for their own marketing needs.

## Organizing Users into Teams

When you organize Market Quest users into teams, a user can view their individual data or all team members’ data. The Access to All Team Users option gives a person access to all team members’ data. Also, a Market Quest user can be a member of more than one team. For example, a processor can be a member of two different teams. When the processor logs onto Market Quest they can select which team’s data to view.

### To Set Up a Team:

A user must have System Administrator privileges to set up a team.

1. Click the **R** icon to display the register screen.
2. Click Team Manager to display the Team Manager screen.
3. The Team Manager has the following features:
   - New – Create a new team.
   - Edit – Add or remove users from the team.
   - Delete – Delete a team.
   - Rename – Rename a team.
   - Report – List the users of a team.
1. Click New to create a new team.
2. Select a Market Quest user from the left list and click Add.
3. If you want a user to be able to view all team members’ data, add the user to the Team List and then click Set View.
4. Click Close and enter a unique team name. Before you can close, one or more users must be set to View All team members’ data.

The team creator screen has the following features:
- Add – Add a user to the team.
- Remove – Remove a user from the team.
- Set View – Give a team member the privilege to view all other team members’ data.
- Rem View – Remove a team member’s privilege to view all team members’ data.
- Close – Close and save changes.
- Cancel – Close and don’t save changes.

**Assigning Sales Reps to Customers and Contacts**

When a sales rep creates a customer or contact record, the owner field is set to the sales rep’s name. The owner field is used to determine who the record belongs to. When a letter is printed to a customer or contact, Market Quest puts the sales rep’s name (as determined by the owner field) in the letter. All records must be assigned to a sales rep before you can print letters.

Other sales reps cannot change the owner field, unless they have a system privilege to view all user’s data.
Printing Letters and Sending E-Mail

When printing campaign letters the assigned loan sales rep's name for each customer or contact is printed at the bottom of the letters. When sending e-mail, the assigned sales rep's information is added to the end of the e-mail.

Using Queries

Queries are used to select records. If you want to create a query for a specific sales rep, use the Sales Rep field and select the name of the sales rep. Only those records assigned to the sales rep will be selected. If you don't use the Sales Rep field in a query, all sales reps' data will be selected. See Creating Queries for more information.

Time Stamping Notes

When entering notes for a customer or contact and click Set Time, your login name appears in the notes as the author.
## Importing

### Introduction

Market Quest can import information from many different, such as Excel, CSV or text files.

### Importing Features

Market Quest uses a common set of features to manage and control importing data. The availability of a particular Market Quest feature depends on the types of data contained in the other program.

The import screen has the following features:

- **Read Data From** – Select the interface module or file to be imported.
- **Program/File Location** – Specifies where the other program is located or the file to be imported.
- **Market Quest User** – If you are using the Multi-User Enterprise system, you can select a user to import.
To import data:

1. Click the import icon.
2. The import screen displays where you can manage and control importing. This screen is used to import data from another program or a data file.
3. Select Read New Customers or Read New Contacts. Depending on the type of data imported, one of these options may not be available.

Setup for Importing Data Files

The import setup wizard guides you through the steps required to import data from a file, such as an Excel spreadsheet or a text file. Select Import File from the Read Data From List.

The Import Template Manager manages the process for creating and editing templates.

It has the following features:

- **New** – Create a new template.
- **Edit** – Edit an existing template.
- **Rename** – Renames a template.
- **Delete** – Deletes a template.

To create a new data file template:

1. Click New.
2. Enter a template name and click Next.
3. Select Import File Type. The file type describes the format of the data to be imported.
4. Click Next.
5. Select the type of people you are importing. Market Quest cannot import both customers and contacts from one data file.

6. Click Next.

7. Indicate the status of the people being imported:
   - **Clients** – All imported people will have the Market Quest status field set to Client.
   - **Prospects** – All imported people will have Market Quest status field set to Prospect.
   - **Use Status field** – Select if the imported data has a status field that can be mapped to the Market Quest status field.

8. Click Next.

9. Click Select File to select the file to import and then click Next.

10. Market Quest displays one record read from the import file and displays it in the left list.

11. Select the first item in the import data list. Select the Market Quest field that corresponds to this data item and click Map.

12. Continue mapping import data fields with the Market Quest fields. Make sure you go in the order of the list. If there is no corresponding Market Quest field, click Skip.

13. Click View to see the mapping between Market Quest and the data being imported.

14. Click Save and then Close when finished.

15. Once a template is created, select it from the Read Data From list and click Read Customer or Read Contacts to import data.
16. To select a different file to import, click and select the file. The file needs to have the same order of fields; otherwise the data will not map correctly with Market Quest fields.

Read Customers

This feature reads customer data from another program or data file and creates new customer records in Market Quest. If a customer already exists in Market Quest the record will be updated with the imported information.

To read new customers:

1. Click the Import icon.
2. Select the name of the other program or the template name from the Read Data From list.
3. If you are using the Multi-User Enterprise system, select the Market Quest user from the list of users. You can also select All Sales reps from the list. However, you should map sales rep IDs to all Market Quest users before you use the All Sales reps option.
4. If you mapped Rep IDs to Market Quest users, only files that match the Other Program Sales rep ID data will be read. If this field is blank, all files are read and created in the name of the sales rep selected.
5. Click Read Customers.
6. When Market Quest reads customers from another program or data file, it searches its Customers database to see if the record already exists. Market Quest will not create another customer record if it finds a match. A match is found in one of the following conditions:
7. Social Security numbers match.
8. If the social security numbers and loan IDs don’t match, Market Quest uses the primary customer's first and last name.
9. If Market Quest doesn't find a matching customer, it will create a new record in the Customers database.
10. If a customer has been previously imported, Market Quest updates the record with new imported information. If the Update All option is set to Yes, Market Quest updates all previously imported records. If it is not set, only open loans and prospects are updated. Closed loans are not updated. This improves importing performance.

Read Contacts

The Read Contacts feature creates and updates contact records in Market Quest if contacts are stored in separate databases or data files. Contacts are all non-customers, such as personal contacts, Realtors, attorneys, financial planners, etc.

To read contacts:

1. Click the Import icon.
2. Select the name of the other program or the template name from the Read Data From list.
3. If you are using the Multi-User Enterprise system, select the Market Quest user from the list of users. You can also select All Sales reps from the list. However, you should map sales rep IDs to all Market Quest users before you use the All Sales reps option.

4. If you mapped Rep IDs to Market Quest users, only files that match the Other Program Sales rep ID data will be read. If this field is blank, all files are read and created in the name of the sales rep selected.

5. Click Read Contacts.

6. When Market Quest reads contacts from another program or data file, it searches its Contacts database to see if the record already exists. Market Quest will not create another contact record if it finds a match. A match is found if the record has not been previously imported and the first and last names are the same.

7. If Market Quest doesn't find a matching contact, it will create a new record in the Contacts database.

8. If a contact has been previously imported, Market Quest updates the record with new imported information.

**Importing Options**

The Setup Wizard guides you through setting import option. This option allows you set options without using the Setup Wizard.

**Update All Files**

After Market Quest records are created, they can be updated. If marked, all imported records will be read and updated. If unmarked, only certain records are updated that have changed since the last time you imported.

**Track Birthdays**

If marked, Market Quest translates imported customer and contact birthdays into birthday events. A birthday event doesn’t use the year the person was born; it uses the current year so it can track it and remind you when it is going to expire during the year.

**Remove Last Import**

This feature removes customer and contact records recently imported. Its purpose is to remove records incorrectly imported. It can be especially useful if data fields from a file are mapped incorrectly. You can remove the imported records, remap fields and then import again.

**Note:** Only records from the last import are removed. For example, if you click Read Customers twice, you cannot remove any records created from the first import.

**Show Links**

This feature allows you to view the links between the Market Quest customers and the other programs customer file. If a Market Quest customer record is incorrectly linked to a file, you can do the following to relink the record:

1. Select the customers in the list to clear. You can also select all customers.
2. Click Clear Links and then Close.
3. Click Read Customers to relink the customers.
Map Sales rep IDs

This feature reads the Rep IDs from the other loan program and displays them for mapping with Market Quest users. If all files belong to one sales rep and you are using a single version, you don’t need to map IDs.

To Map Sales rep IDs:

1. Select the Market Quest user from the left list.
2. Select the Other Rep ID from the right list.
3. Click Map.
4. Continue mapping users to IDs as needed.
5. Click Close when finished to save changes.

Mapping Rep IDs in a Multi-User System

If you are using the Multi-User Enterprise system, you should map Rep IDs for all Market Quest users. The following is a method for mapping and verifying Rep IDs. Sales reps that don’t have mapped Rep IDs are ignored.

1. Map all Market Quest users to Rep IDs. If there are Rep IDs of people no longer with the company, map them temporarily to Market Quest users. After you import data for these users, map them to their actual Rep ID.
2. Select a Market Quest user and click Read Customers to import customers.
3. Verify that the correct records were imported for the user. If they are incorrect, click Remove Last Import and correct the ID mapping problem.
4. Repeat steps 2 and 3 for all sales reps.
5. When all data has been imported, you can use the All Sales reps option with confidence that the Rep IDs are correctly mapped.

**Display Import Results**

When you import data, you can choose to display the import results. This allows you to see which records will be updated and added. You can also select which records to import and which to skip.

![Import Results Screen](image)

The Import Results screen has the following features:

- **Import Checkbox** – All marked records will be imported. Click the checkbox to mark and unmark records.
- **Select All** – Mark all import checkboxes.
- **Select None** – Unmark all import checkboxes.
- **Select** – Import records that meet a certain criteria, such as added only or only open loans.
- **Import** – Import all records with marked Import CheckBoxes.
- **Cancel** – Cancel the import. No records will be imported.

**Import Results Report**

When you import customers or contacts, you can print an Import Results report. The report shows the customers and assigned contacts added or linked with Market Quest records. If a person is already in Market Quest, the report shows the person linked with the other program’s file.
Introduction

Market Quest is integrated with third party products and services on a pay per use basis. This provides you with an easy method for ordering products and services when needed and in any quantity you require.

Market Quest’s account management system tracks your orders and usage. You simply add money to your account and Market Quest deducts the cost of each service by the appropriate amount used. Special management reports are available to show your account balance, order history and service usage statistics.

Market Quest is integrated with the following services:

- Letter Printing (Eye Comm)

Account Management

In order to use Market Quest services on a pay per use basis, you need to add money to your service account and have access to the Internet. As you use each service, the cost is deducted from your account. You can add money to your account anytime via the Internet. You can also call Market Focus Sales at 800-708-9715 to order by phone.

To add money to the account via the Internet:

1. Start Market Quest.
2. Select Services / Account Management / Add to Account.
3. Market Quest displays a web page in your Internet browser. Follow the instructions to complete the secure credit card entry form. Upon completion, an order confirmation is e-mailed to you by the credit card processing company.
4. Market Focus will receive your order and process it within one business day. After the order is processed, you will receive an e-mail from Market Focus indicating that your account has been updated on the Internet.
5. When you receive the Market Focus e-mail, select Services / Account Management / View Balance. Market Quest reads the information from the Internet and updates your account.
Account Management Reports

There are two reports to help you manage your Market Quest service account. To run these reports, select Services / Account Management / Reports.

- Order History – Shows a history of product orders during the time period you specify.
- Usage Report – Shows the amount of products and services used during the time period you specify.

Letter Printing Service

Market Focus, Inc. has partnered with a direct marketing communications firm named Eye Comm to print and mail Market Quest letters. This service is on demand so you can choose when you want to print letters on your computer or send them to Eye Comm for printing and mailing.

Here’s how it works:

When letters are due to print, you are given an option to print to your computer or send to Market Focus, Inc. which tracks and sends the letters to Eye Comm. When the Send to Market Focus option is selected, Market Quest performs the mail merge on your computer and then e-mails the output, along with a matching address list to Market Focus. The letters are tracked in Market Quest exactly the same way.

Key features of the service include:

- Letters are printed on your stationery.
- Addresses are printed on envelopes.
- First class stamps are applied to envelopes.
- The cost for printing and mailing is deducted from your service account.
- There are no minimums to the number of letters you can send for printing and mailing.

Letter Printing Service Setup

There are several steps you must complete before you send letters for printing.

1. Send your stationery and envelopes to Eye Comm, Inc. 10960 Wheatlands Ave. Ste 108, Santee CA 92071, Phone 619-448-6111.
2. Add money to your service account.
3. Scan your signature and register it in Market Quest. See Registering Graphics for more information.
4. Enable the print service.

To Enable the Service:

1. Start Market Quest.
2. Select Services / Eye Comm (Mail Letters) / Enable Service.
Using the Print Service

1. Select the print monitor to show which letters are due to print.
2. Click Print or Print all and the screen below displays.
3. Select Send to Market Focus. Market Quest performs the mail merge and displays a submit screen when finished. This screen show the cost and gives you the option to view letters before submitting them.

4.
5.

6. Select Send to Market Focus. Market Quest performs the mail merge and displays a submit screen when finished. This screen show the cost and gives you the option to view letters before submitting them.

7.
E-Card Service

Market Focus’ e-card service gives you another effective way to communicate with everyone in your database easily and consistently. There are e-cards for each major holiday and for the seasons of the year. In addition, there are several types of birthday e-cards you can send.

Market Focus e-cards have unique features which make them even more powerful and effective:

- Each e-card has a salutation line, such as Dear William, which personalizes the e-mail.
- You can add personal messages to each e-card individually or to all e-cards.
- The birthday e-card is integrated with Market Quest’s birthday reminder so you can e-mail the e-cards on the person’s birthday.
- A new Market Quest “Holiday” event reminds you to send the appropriate e-card at the appropriate time.

Sending Holiday and Seasonal E-Cards

When you start Market Quest, it searches for e-card events and reminds you 3 days before the actual due date. The holiday or season name appears in the event monitor screen. Click on the e-card name in the list and then click Select. The Broadcast E-mail Wizard displays and is used to control sending the e-cards.
You can send e-cards without waiting for the event reminder at any time. Select File \ Send \ Broadcast E-Mail \ E-Cards to display the Broadcast E-mail Wizard.

Follow the steps for using the Broadcast E-mail Wizard. If needed, please review the section called Broadcast E-mail for detailed instructions. When you reach the step for selecting the HTML file, click Sending E-Cards. Select the appropriate e-card from the list. Click the Next button and complete the remaining steps. When you reach the E-Mail Summary Page, click Send and the E-Card Control screen displays. See the section on Using the E-Card Control Screen.

Sending Birthday E-Cards

Market Quest tracks customer and contact birthdays and reminds you when they are due in the Event Monitor screen. Click on the birthday event and the Card File View displays. Click the Send E-Card button and the E-Card Control screen appears.

**Tip:** Ideally, you will want to send e-cards on the person’s birthday. To set Market Quest to remind you on the exact date, select Tools \ Options \ Events tab. Set the Days Before Birthdays and Anniversaries to 0.

Using the E-Card Control Screen

The E-Card Control screen provides features to view and customize each e-card before you e-mail them. This screen is used for holiday and seasonal e-cards, as well as birthday e-cards.
The people selected to receive e-cards are shown in the list. Each person has a line through their name to indicate they have not been selected yet. You must select people in the list to receive the e-card by clicking each checkbox or the Select All button.

**Select All**
Marks everyone in the list to indicate they will receive e-cards.

**Select None**
Unmarks everyone in the list to indicate they will not receive e-cards.

**Send E-Cards**
Market Quest sends e-cards to all people who have a checkmark.

**Customize**
You can customize each e-card, such as change the subject line or add a personal message. Click on a person’s name and click Customize. The screen below displays.

**Change**
If there is more than one version of an e-card, such as birthday e-cards, you can select the one you want for each person. Click on a person’s name and then click Change. Select the e-card desired.

**Zoom Out / Zoom In**
Displays the e-card in more detail so you can view the personal message and other information.

**Customizing E-Cards**
You can customize e-cards in a variety of ways, such as change the default e-mail subject line and create a personalized message. You can customize e-cards individually for each person or apply the customization to all e-cards. Click Update All E-Cards to update all e-cards for all people in the list.
Sending Single E-Cards

You can send individual e-cards without using the Broadcast E-mail feature.

**To send a single e-card:**

1. Go to the person’s record.
2. Select File \ Send \ E-card
3. Select the e-card to send.
4. Use the control screen features discussed above to send the e-card.

Internet Backup and Synchronization Service

The Internet Backup and Synchronization service enables you to back up your data to Market Focus’ remote Internet site for extra security. All backups are encrypted to further protect your data. This service also provides a method for synchronizing Market Quest data between versions installed on separate computers. For example, you can synchronize data between Market Quest installed at the office and another Market Quest program installed on your computer at home.

**To back up your Market Quest data to the Internet:**

1. Select File \ Back Up Data to \ Market Focus.
2. A backup file of your data is created and uploaded to the Internet. Market Quest keeps 7 backup files on the server at any given time.

**To restore your Market Quest data from the Internet:**

1. Select File \ Restore Data From \ Market Focus.
2. A list of backup files on the Internet is displayed. Each backup file has the date and time in the name so you can determine the latest backup.
3. Select the backup file to restore. The file is downloaded to your computer and Market Quest restores the data.

**To synchronize your data between multiple Market Quest programs:**

1. **On Computer 1:** Select File \ Synchronize Data \ Back Up for Merging to \ Market Focus. This will create a backup of your Customers and Contacts data only and upload the file to the Market Focus Internet servers.
2. **On Computer 2:** Select File \ Synchronize Data \ Merge Data from \ Market Focus. The special file created on Computer 1 is downloaded from the Internet server and modified records are updated.

**Note:** Only modified Customer and Contact records are synchronized. Market Quest does not synchronize marketing campaigns, letters, assignments, and many other features.

**Caution:** There is a possibility of data loss or some records may not be merged if 2 people modify the same person’s record in 2 different Market Quest programs. The merge feature used the last modified date for each record and determines which is the newest. The newest record overwrites the older record.

5.

6.
Real Estate Module

Introduction

The Real Estate module extends Market Quest’s capabilities to provide CRM and marketing for the real estate industry. Additional screens are provided to capture key information on buyers and sellers of property. The Real Estate module also contains marketing campaigns designed to stay in contact with prospects and past customers.

A checklist system keeps track of tasks defined for the buying and selling process. You can also track contingencies needed to complete the transaction.

Marketing Campaigns for Real Estate

Market Quest contains the following marketing campaigns designed to stay in contact with prospects and past customers on a consistent basis. There are separate campaigns for buyers and sellers. Each campaign has letters in print and e-mail format.

- **Prospect Buyer** – Stay in contact with prospects looking for an agent to help them buy a property. The goal is to help them decide to enlist you as their agent.
- **Prospect Seller** – Stay in contact with prospects looking for an agent to help them sell their property. The goal is to help them decide to enlist you as their agent.
- **Client Buyer** – When prospects decide to enlist you are their agent, this campaign stays in contact with them while they look for property. The goal is to encourage customer loyalty during the property buying process.
- **Client Seller** – When prospects decide to enlist you are their agent, this campaign stays in contact with them while you list their property. The goal is to encourage customer loyalty during the property selling process.
- **Past Buyer** – After the real estate transaction, this campaign stays in contact with your past buyer clients. The goal is to encourage client referrals and repeat business.
- **Past Seller** – After the real estate transaction, this campaign stays in contact with your past seller clients. The goal is to encourage client referrals and repeat business.
Managing Property Sellers

Market Quest has a series of screens to capture key information on properties listed for sale. For each customer, you can track multiple listings. The following screens are used to manage property sellers.

- **Listings** – Contains information on the property listed for sale.
- **Closing** – Contains closing information and dates.
- **Key Contacts** – Identifies people involved in the transaction.
- **Checklist** – Tracks tasks for selling the property.
- **Contingencies** – Tracks important contingencies needed to complete the transaction.
- **Features** – Describes key features of the home.

Listings Screen

This screen is used to manage property listings for the customer displayed. A customer may have multiple listings entered.

Property Lists

At the top of the screen is a list of current and past listings. To add a listing, click Add and enter the appropriate information. Information on other selling screens is linked to the property selected in the list. For example, information in the closing, key contacts, checklist, contingency and feature screens is linked to the listing selected in the property list. If there are multiple properties, click the checkbox next to the property to show information for that property.

Property Status

Select the status of the property.

Property Type

The type of property listed.
Home Type
The type of home.

Occupancy
The occupancy status of the listing.

Reason for Selling
Key reason why the customer is selling.

Timeframe
Timeframe for selling the property.

Lock Box
Lock Box number.

Days on the Market
This value is calculated based on listing date.

Listing Term
Term of listing.

Listing Price
Current list price.

Minimum Price
Minimum offer price.

Maximum Price
The maximum offer.

Next Showing
The date of the next showing.

Open House
The open house date.

List Date
The date the property was listed.

Expire Date
The date the listing expires. This date is tracked by Market Quest.
Closing Screen

This screen is used to manage closing information.

**Contract Date**
The date the property was sold.

**Sold Price**
The selling price.

**Commission**
Commission earned on the sale.

**Escrow Close**
The date the escrow was closed.

**Escrow #**
The escrow number.

**Percent**
Commission percentage.

**Possession Date**
The date of possession.

**Title #**
The title number.
Key Contacts Screen

This screen tracks the people involved with the transaction.

<table>
<thead>
<tr>
<th>Name</th>
<th>Company</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyer</td>
<td>Elkys Buyer Company</td>
<td>(669) 777-7797</td>
</tr>
<tr>
<td>Lender</td>
<td>Larry Lender</td>
<td>(655) 856-666</td>
</tr>
<tr>
<td>Agent</td>
<td>Agent Uset</td>
<td>(669) 868-666</td>
</tr>
<tr>
<td>Title</td>
<td>Terry Title</td>
<td>(669) 265-8566</td>
</tr>
<tr>
<td>Appraiser</td>
<td>Appraisers R Us</td>
<td>(669) 856-666</td>
</tr>
<tr>
<td>Escrow/Atty</td>
<td>Eddie Escrow</td>
<td>(669) 555-666</td>
</tr>
</tbody>
</table>

Buyer, Lender, Agent, Title, Appraiser Escrow/Atty Buttons

Click the appropriate category of the person you want to assign to the transaction. Enter the person’s name and Market Quest searches the contacts database for that person. If the person is not found, you can add the person to the contacts database and complete the assignment.

Click Save to save the assignments.

To clear an assignment, click the category button again.

Email

Displays a screen for sending an e-mail message to the contact.

Go

Displays the contact’s record.

Email All

Sends a letter or e-mail to all assigned contacts.

Checklist Screen

The checklist screen contains tasks related to listing properties. Tasks are not as important as contingencies which are necessary to complete the transaction once escrow is opened. See the section on Managing Checklists and Contingencies for more information on creating and customizing lists.

Date Shortcuts

Double click the mouse in the Due or Completed column and today’s date is inserted. Right mouse click in these columns displays a calendar.
Task Column

The name of the task to be completed. A bolded task name means the task is due today.

Due Column

Enter the date the task is due. A red due date means the task is overdue. Due dates can be calculated automatically based on other key dates, such as the Listing Date.

Completed Column

Enter the date the task was completed.

Add

Adds a task to the list.

List

Displays predefined checklists, which identify default tasks. Select a list and all tasks are entered into the checklist screen.

Delete

Deletes all tasks selected.

Print

Prints a list of tasks.

Select All

Selects all tasks in the list.

Select None

Deselects all tasks in the list.
Contingencies Screen

The contingencies screen contains contingencies necessary to complete the transaction once escrow is opened. See the section on Managing Checklists and Contingencies for more information on creating and customizing lists.

Date Shortcuts

Double click the mouse in the Due or Completed column and today’s date is inserted. Right mouse click in these columns displays a calendar.

Contingency Column

The name of the contingency to be completed. A bolded task name means the task is due today.

Due Column

Enter the date the contingency is due. A red due date means the contingency is overdue. Due dates can be calculated automatically based on other dates, such as the listing date.

Completed Column

Enter the date the contingency was completed.

Add

Adds a contingency to the screen.

List

Displays predefined contingencies, which identify default tasks. Select a list and all contingencies are entered into the checklist screen.

Delete

Deletes all contingencies selected.

Print

Prints a list of contingencies.
Select All
Selects all contingencies in the list.

Select None
Deselects all contingencies in the list.

Features Screen
The features screen contains information and the special features of the property.

<table>
<thead>
<tr>
<th>Year Built</th>
<th>Square Feet</th>
<th>Lot Size</th>
<th>Bedrooms</th>
<th>Bathrooms</th>
<th>Fireplaces</th>
<th>Stories</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998/1999</td>
<td>2000</td>
<td>0.5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Dining Room
Informal
Custom Paint, Eat-in Kitchen, Eco-friendly Lighting, French Doors

Living Room
Fireplace, Skylight, Spacious
Automatic sprinklers, Built-in BBQ, Energy Windows, Swimming Pool

Garage
3 Car
Contemporary

Features Screen
You can select items in the list and they are added to the field. To add other features to the list, select a blank item in the list, type a description and press Tab.

Year Built
The year the property was built.

Square Feet
The size of the property.

Lot Size
The size of the lot.

Bedrooms, Bathrooms, Fireplaces, Stories
Enter the number for each category.

Dining Room, Living Room, Garage, Interior, Exterior, Design/Style
Enter the characteristics of the property in the appropriate category, such as Dining Room features. The list under the field contains common features and descriptions. You can select items in the list and they are added to the field. To add other features to the list, select a blank item in the list, type a description and press Tab.
Managing Property Buyers

Market Quest has a series of screens to capture key information on properties sold to buyers. For each buying customer, you can track multiple properties sold.

The following screens are used to manage property buyers:

- **Closings** – Closing information and date for properties sold.
- **Key Contacts** – Assign people involved in the transaction.
- **Checklist** – Track tasks for buying the property
- **Contingencies** – Track important contingencies needed to complete the transaction.
- **Buyer Information** – Capture key information on the buyer, such as their goals, needs and current situation.
- **Features** – Describes desired features of the property the buyer is looking for.

Closings Screen

This screen is used to manage closing information.

Property List

At the top of the screen is a list of current and past properties purchased. To add a property, click Add. Information in other screens is linked to the property selected in the list. If there are multiple properties, click the checkbox next to the property to show information pertaining to that property.

**Property Status**

Select the status of the property.

**Property Type**

The type of property listed.
Escrow #
The escrow number.

Title #
The title number.

Sold Price
The selling price.

List Price
Current list price.

Commission
Commission earned on the sale.

Percent
Commission percentage.

Contract Date
The date the property was sold.

Escrow Close
The date the escrow was closed.

Possession Date
The date of possession.

Started Looking Date
The date the buyer started looking.

Key Contacts Screen
This screen tracks the people involved with the transaction.
Real Estate Module Market Quest User Guide

Buttons

Click the appropriate category of the person you want to assign to the transaction. Enter the person’s name and Market Quest searches the contacts database for that person. If the person is not found, you can add the contact and complete the assignment.

Click Save to save the assignments.

To clear an assignment, click the category button again.

Email

Displays a screen for sending an e-mail message to the contact.

Go

Displays the contact’s record.

Email All

Sends a letter or e-mail to all assigned contacts.

Checklist Screen

The checklist screen contains tasks related to looking for and buying properties. Tasks are not as important as contingencies which are necessary to complete the transaction once escrow is opened. See the section on Managing Checklists and Contingencies for more information on creating and customizing lists.

Date Shortcuts

Double click the mouse in the Due or Completed column and today’s date is inserted. Right mouse click in these columns displays a calendar.

Task Column

The name of the task to be completed. A bolded task name means the task is due today.

Due Column
Enter the date the task is due. A red due date means the task is overdue. Due dates can be calculated automatically based on other dates, such as the listing date.

**Completed Column**
Enter the date the task was completed.

**Add**
Adds a task to the list.

**List**
Displays predefined checklists, which identify default tasks. Select a list and all tasks are entered into the checklist screen.

**Delete**
Deletes all tasks selected.

**Print**
Prints a list of tasks.

**Select All**
Selects all tasks in the list.

**Select None**
Deselects all tasks in the list.

**Contingencies Screen**
The contingencies screen contains tasks which are necessary to complete the transaction once escrow is opened. See the section on Managing Checklists and Contingencies for more information on creating and customizing lists.

**Date Shortcuts**
Double click the mouse in the Due or Completed column and today’s date is inserted. Right mouse click in these columns displays a calendar.
Contingency Column
The name of the contingency to be completed. A bolded contingency name means the contingency is due today.

Due Column
Enter the date the contingency is due. A red due date means the contingency is overdue.

Completed Column
Enter the date the contingency was completed.

Add
Adds a contingency to the screen.

List
Displays contingency lists which have predefined contingencies. Select a list and all contingencies are entered into the screen. Due dates can be calculated automatically based on other dates, such as the listing date.

Delete
Deletes all contingencies selected.

Print
Prints a list of contingencies.

Select All
Selects all contingencies in the list.

Select None
Deselects all contingencies in the list.

Buyer Information Screen
The Buyer Information screen describes the customer’s current situation and the goals for purchasing a property.
Renter, First Time Buyer, Selling Home, etc.
Check the appropriate box that describes the customer’s situation.

Home Type
The type of home the customer is looking for.

Property Type
The type of property the customer is looking for.

Price Range
Identifies the desired property price range.

Timeframe
The customer’s timeframe for purchasing a property.

How Long Looking
How long the customer has been looking for property.

Mortgage Status
Describes their current mortgage status.

Goals
Identifies the customer’s goals. You can type directly in the field or select a goal from a list of predefined goals below the field. To add a goal to the list, select a blank item, enter a value in the list and press Tab.

Areas Looking
Identifies where the customer is looking for property. You can type directly in the field or select an area from a list of predefined areas below the field. To add an area to the list, select a blank item, enter a value in the list and press Tab.

Desired Features Screen
The Desired Features Screen describes the property features important to customer.
Home Age
The age of the home.

Square Feet
The size of the property.

Lot Size
The size of the lot.

Bedrooms, Bathrooms, Fireplaces, Stories
Enter the number for each category.

Dining Room, Living Room, Garage, Interior, Exterior, Design/Style
Enter the characteristics of the desired property in the appropriate category, such as Dining Room features. The list under the field contains common features and descriptions. You can select items in the list and they are added to the field. To add other features to the list, select a blank item in the list, type a description and press Tab.

Managing Checklists and Contingencies
Market Quest has lists to help you manage tasks associated with buying and selling properties. There are two categories of lists for buyers and sellers: checklists and contingencies. Checklists are typically non-critical tasks which need to be completed, such as putting up signs, making flyers, etc. Contingencies are critical tasks that need to be done in order to close escrow. There are separate checklists and contingency lists for buyers and sellers. Both checklists and contingency lists share similar features.

Market Quest has a List Manager which defines default tasks for checklists and contingencies. You can modify these lists for your own needs as well as create custom lists.

To access the List Manager

1. Click the Real Estate tab.
2. Click the Selling or Buying tab.

3. Click the Checklist or Contingencies tab.

4. Click Lists. The List Manager displays the lists defined for the particular category, such as Seller Checklists. If you were on the Buyer Checklist screen, the List Manager displays Buyer Checklists. If you were on the Seller Contingencies screen, the List Manager displays Seller Contingency lists, etc.

The List Manager screen has the following features:

- **Select** – All tasks defined by the list selected are entered into the appropriate screen. In the example above, the Seller Checklist screen. Tasks are linked to the property address selected. If you have not added a property, the Select button is dimmed.

- **New** – Create a new list.

- **Edit** – Edit a list.

- **Copy** – Copy the tasks of one list to another.

- **Rename** – Rename a list.

- **Delete** – Delete a list.

- **Print** – Print a report of all tasks in the list.

When New or Edit is selected, the following screen displays where you can add and edit tasks:
The Edit screen has the following features:

- **Task** – Describes the task.
- **Days After** – The number of days after the Date Entered value the task is due. For example, when this list is selected, the Add to MLS task will be due 2 days after the Listing Date value. The due date is calculated automatically when there is a Listing Date value.
- **Date Entered** – Used to calculate the Due Date for the task. Values include Listing Date, Contract Date, Escrow Close Date and Possession Date.
- **New** – Create a new task and add to the list. Enter the information at the bottom of the screen, i.e., task description and click Save.
- **Save** – Save changes to the list.
- **Undo** – Undo changes to the list.
- **Cancel** – Don’t save any changes and return to the List Manager.

To edit an existing task:

Click on a task in the list, e.g., Deliver Keys. The information appears at the bottom of the screen. You can change the Task Description, Due Days After, and Date Entered values and click Save.

### Tracking Checklists, Contingencies, & Expired Listings

Every time you start Market Quest, it searches for all checklist tasks, contingencies and expired listings which are due on that day or which are overdue. Tasks are selected based on the Due Dates in the checklist and contingencies screens for buyers and sellers.

Expired Listings are selected based on the listings expired date for the property. There is an option for setting the number of days to be reminded before listings expire.
To set the number of days to be reminded before expired listings:

1. Select Tools > Options and click Events.
2. Set the Number Days Before Listings Expire value.
3. Click Close.

The following screen is displayed to show which items are due. Select an item in the list to display more details.

Expired Listings

When you select Expired Listings in the Today’s Events screen, the screen below displays.

The Expired Listings screen has the following features:

- **Don’t Show** – If you do not want a listing address to show in the Expired Listings screen anymore, mark the checkbox next to the address and click Don’t Show.

- **Notes** – Click on a listing and click Notes to display the customer notes.

- **Go To Record** – Click on a listing and click Go To Record to display the customer’s full record.

- **Add to Campaign** – Selected customers are added to a campaign.
Checklist Tasks Due

When you select Checklists in the Today’s Events screen, the screen below displays all tasks due or overdue for buyers and sellers.

The Checklist Tasks Due screen has the following features:

- **Complete** – All tasks selected are marked completed and will no longer be displayed.
- **Notes** – Click on a task and click Notes to display the customer notes.
- **Go To Record** – Click on a task and click Go To Record to display the customer’s full record.
- **Add to Campaign** – Add selected customers are added to a campaign.
- **Print** – Print a checklist task report.
- **Select All** – Selects all tasks.
- **Select None** – Deselects all tasks.

Contingencies Due

When you select Contingencies in the Today’s Events screen, the screen below displays all contingencies due or overdue for buyers and sellers.
The Contingency screen has the following features:

- **Complete** – All contingencies selected are marked completed and will no longer be displayed.
- **Notes** – Click on a contingency and click Notes to display the customer notes.
- **Go To Record** – Click on a contingencies and click Go To Record to display the customer’s full record.
- **Add to Campaign** – Selected customers are added to a campaign.
- **Print** – Print a contingencies report.
- **Select All** – Selects all contingencies.
- **Select None** – Deselects all contingencies.
Marketing Letters and Strategies

Introduction

Market Quest's campaign manager provides the tool to manage effective marketing campaigns for any purpose. Once a campaign is set up, it runs automatically until completion. You can write your own marketing letters, although, writing high quality and effective marketing letters is a time consuming process.

Market Focus is continually developing marketing materials that can be used only with Market Quest. These letters are designed to provide valuable information to your prospects and business associates. The letters quote industry experts who give the information in the letters credibility. The letters end with a request for referrals or their business.

Special Interest Letters

Take relationship marketing to the next level with Special Interest letters. Find out what interests your customers and clients and send them valuable information on these topics. These letters can be used for both customers and contacts, such as Realtors and other affinity sources who may refer business to you.

The following topic areas are available for purchase. Each series can be printed or e-mailed and sold separately.

1. Bicycling
2. Birding
3. Boating
4. Cats
5. Dogs
6. Fishing
7. Gardening
8. Golfing
9. Health & Fitness
10. Home Improvement
11. Inspirational
12. Investing
13. Management
14. Retirement
15. Running
16. Self Improvement
17. Selling
18. Skiing
19. Swimming
20. Tennis
21. Travel
22. Walking
23. Wine
24. Working Parents
# Market Quest Merge Fields

## Customer Merge Fields

The following fields are available to insert into customer letters.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M_PREFIX</td>
<td>Personal title</td>
</tr>
<tr>
<td>M_FIRST_NA</td>
<td>First name</td>
</tr>
<tr>
<td>M_MID</td>
<td>Middle initial</td>
</tr>
<tr>
<td>M_LAST_NAM</td>
<td>Last name</td>
</tr>
<tr>
<td>M_ADDRESS</td>
<td>Address</td>
</tr>
<tr>
<td>M_CITY</td>
<td>City</td>
</tr>
<tr>
<td>M_STATE</td>
<td>State</td>
</tr>
<tr>
<td>M_ZIP</td>
<td>Zip</td>
</tr>
<tr>
<td>M_REFNAME</td>
<td>Person who referred customer to you</td>
</tr>
<tr>
<td>M_SOURCE</td>
<td>Referring source of the customer</td>
</tr>
<tr>
<td>M_EMAIL</td>
<td>Email address</td>
</tr>
<tr>
<td>M_ACTION</td>
<td>Customer action field</td>
</tr>
<tr>
<td>M_TELEPHON</td>
<td>Home phone number</td>
</tr>
<tr>
<td>M_WORK_EXT</td>
<td>Work extension</td>
</tr>
<tr>
<td>M_DEAR</td>
<td>Salutation (Dear Mr. Smith)</td>
</tr>
<tr>
<td>G_NAME1</td>
<td>Customer's full name</td>
</tr>
<tr>
<td>G_NAME2</td>
<td>Co-customer's full name</td>
</tr>
<tr>
<td>G_DATE</td>
<td>Current date</td>
</tr>
<tr>
<td>B_CO_PREI</td>
<td>Co-customer personal title</td>
</tr>
<tr>
<td>B_CO_FIRST</td>
<td>Co-customer first name</td>
</tr>
<tr>
<td>B_CO_LAST</td>
<td>Co-customer last name</td>
</tr>
<tr>
<td>B_PROPADDR</td>
<td>Property Address</td>
</tr>
<tr>
<td>B_PROP_CITY</td>
<td>Property City</td>
</tr>
<tr>
<td>B_PROPSTAT</td>
<td>Property State</td>
</tr>
<tr>
<td>B_PROPZIP</td>
<td>Property Zip</td>
</tr>
<tr>
<td>B_PROP_PHON</td>
<td>Work Phone number</td>
</tr>
<tr>
<td>B_ACT_CLOS</td>
<td>Actual closing date</td>
</tr>
<tr>
<td>B_EST_CLOS</td>
<td>Estimated closing date</td>
</tr>
</tbody>
</table>
B_OPENDATE  Loan open date
B_LOANAMT   Loan amount
B_LOANRATE  Loan interest
B_LOANTYPE  Type of loan
B_SALEPRIC  Home sales price
B_LOANSTAT  Loan status
B_DOWNPAY   Down payment
B_PURPOSE   Loan purpose (refinance or purchase)
B_CONTING   Date a contingency is removed
B_LOANID    Loan ID
B_LOANLTV   Loan to value
B_LOCKDATE  Interest lock date
B_CREDREPX  Loan status (Credit report)
B_ELETTERX  Loan status (Credit Explanation letter)
B_APPRAISX  Loan status (Appraisal)
B_E_VERIFX  Loan status (Employment verification)
B_W2X       Loan status (Tax & W2 forms)
B_S_INSTRX  Loan status (Sale escrow instructions)
B_VERDEPX   Loan status (Verification of deposit)
B_HOMEINFX  Loan status (Home association information)
B_MORTVERX  Loan status (Market verification)
B_RENTALX  Loan status (Rental agreement)
B_TITLEREX  Loan status (Title report)
B_FILERDYX  Loan status (File ready)
B_OTHERX   Loan status (Other checkbox)
B_SUBMITX  Loan status (File submitted)
B_APPROVEX  Loan status (Loan approved)
B_SEL1LAST  Assigned selling agent last name
B_SEL1FIRS  Assigned selling agent first name
B_SEL1CPNY  Assigned selling agent company
B_SEL2LAST  Assigned seller last name
B_SEL2FIRS  Assigned seller first name
B_SEL2CPNY  Assigned seller company
B_LST1LAST  Assigned listing agent last name
B_LST1FIRS  Assigned listing agent first name
B_LST1CPNY  Assigned listing agent company
B_LST2LAST  Assigned builder last name
B_LST2FIRS  Assigned builder first name
B_MARGIN   Margin for the loan
B_LST2CPNY  Assigned builder company
B_ESCRLAST  Assigned escrow/Attorney last name
B_ESCRFIRS  Assigned escrow/Attorney first name
B_ESCRCPNY  Assigned escrow/Attorney company
B_OTDATA   Loan status (other data line 1)
B_OTDATA2  Loan status (other data line 2) in letters
B_OTDATA3  Loan status (other data line 3)
B_APPRDATE  Loan approval date
B_LOANPROC  Loan processor name
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B_BASELOAN</td>
<td>Base loan amount</td>
</tr>
<tr>
<td>B_APPRAIS</td>
<td>Appraiser name</td>
</tr>
<tr>
<td>B_ANCAP</td>
<td>Lifetime cap</td>
</tr>
<tr>
<td>B_APRVAL</td>
<td>Appraised value of home</td>
</tr>
<tr>
<td>B_POINTS</td>
<td>Points</td>
</tr>
<tr>
<td>B_CLOSE2</td>
<td>Second market closing date</td>
</tr>
<tr>
<td>B_TOTINCOM</td>
<td>Customer total income</td>
</tr>
<tr>
<td>B_TOTDEBT</td>
<td>Customer total debt</td>
</tr>
<tr>
<td>B_MOPAY</td>
<td>Monthly payment</td>
</tr>
<tr>
<td>B_LENDER</td>
<td>Lender name</td>
</tr>
<tr>
<td>B_TARGRATE</td>
<td>Desired interest rate for the customer</td>
</tr>
<tr>
<td>B_INDEX</td>
<td>Loan index used</td>
</tr>
<tr>
<td>B_EMAIL</td>
<td>Customer email address</td>
</tr>
<tr>
<td>R_PREFIX</td>
<td>Your personal title</td>
</tr>
<tr>
<td>R_LAST_NAM</td>
<td>Your last name</td>
</tr>
<tr>
<td>R_FIRST_NA</td>
<td>Your first name</td>
</tr>
<tr>
<td>R_INITIAL</td>
<td>Your middle initial</td>
</tr>
<tr>
<td>R_TITLE</td>
<td>Your title</td>
</tr>
<tr>
<td>R_HOMEPHON</td>
<td>Your home phone number</td>
</tr>
<tr>
<td>R_WORKPHON</td>
<td>Your work phone number</td>
</tr>
<tr>
<td>R_WORK_EXT</td>
<td>Your work extension</td>
</tr>
<tr>
<td>R_CARPHONE</td>
<td>Your car phone</td>
</tr>
<tr>
<td>R_FAX_NUMB</td>
<td>Your fax number</td>
</tr>
<tr>
<td>R_STREET</td>
<td>Your street address</td>
</tr>
<tr>
<td>R_CITY</td>
<td>Your city</td>
</tr>
<tr>
<td>R_STATE</td>
<td>Your state</td>
</tr>
<tr>
<td>R_ZIP</td>
<td>Your Zip Code</td>
</tr>
<tr>
<td>R_COMPANY</td>
<td>Your company</td>
</tr>
<tr>
<td>R_LP_FIRST</td>
<td>Your assistant 1 first name</td>
</tr>
<tr>
<td>R_LP_LAST</td>
<td>Your assistant 1 last name</td>
</tr>
<tr>
<td>R_LP_FIRS2</td>
<td>Your assistant 2 first name</td>
</tr>
<tr>
<td>R_LP_LAST2</td>
<td>Your assistant 2 last name</td>
</tr>
<tr>
<td>R_PAGER</td>
<td>Your pager number</td>
</tr>
<tr>
<td>R_EMAIL</td>
<td>Your email address</td>
</tr>
<tr>
<td>R_WEBSITE</td>
<td>Your website URL</td>
</tr>
<tr>
<td>MERGE1</td>
<td>User-defined merge field 1</td>
</tr>
<tr>
<td>MERGE2</td>
<td>User-defined merge field 2</td>
</tr>
<tr>
<td>MERGE3</td>
<td>User-defined merge field 3</td>
</tr>
<tr>
<td>MERGE4</td>
<td>User-defined merge field 4</td>
</tr>
<tr>
<td>MERGE5</td>
<td>User-defined merge field 5</td>
</tr>
<tr>
<td>MERGE6</td>
<td>User-defined merge field 6</td>
</tr>
<tr>
<td>MERGE7</td>
<td>User-defined merge field 7</td>
</tr>
<tr>
<td>MERGE8</td>
<td>User-defined merge field 8</td>
</tr>
<tr>
<td>MERGE9</td>
<td>User-defined merge field 9</td>
</tr>
</tbody>
</table>
Contact Merge Fields

The following fields are available to insert into contact letters.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M_PREFIX</td>
<td>Personal title (Mr., Mrs., etc.)</td>
</tr>
<tr>
<td>M_LAST_NAM</td>
<td>Last name</td>
</tr>
<tr>
<td>M_FIRST_NA</td>
<td>First name</td>
</tr>
<tr>
<td>M_MID</td>
<td>Middle initial</td>
</tr>
<tr>
<td>M_TITLE</td>
<td>Title</td>
</tr>
<tr>
<td>M_COMPANY</td>
<td>Company</td>
</tr>
<tr>
<td>M_ADDRESS</td>
<td>Mailing street address</td>
</tr>
<tr>
<td>M_CITY</td>
<td>City</td>
</tr>
<tr>
<td>M_STATE</td>
<td>State</td>
</tr>
<tr>
<td>M_ZIP</td>
<td>Zip Code</td>
</tr>
<tr>
<td>M_ACTION</td>
<td>Contact’s action field</td>
</tr>
<tr>
<td>M_EMAIL</td>
<td>Contact’s email</td>
</tr>
<tr>
<td>M_TELEPHON</td>
<td>Telephone number</td>
</tr>
<tr>
<td>M_WORK_EXT</td>
<td>Telephone extension</td>
</tr>
<tr>
<td>M_DEAR</td>
<td>Salutation (Dear Mr. Smith)</td>
</tr>
<tr>
<td>G_DATE</td>
<td>Current date</td>
</tr>
<tr>
<td>G_NAME1</td>
<td>Contact’s full name</td>
</tr>
<tr>
<td>G_NAME2</td>
<td>Co-contact’s full name</td>
</tr>
<tr>
<td>A_CO_PREFI</td>
<td>Co-contact’s personal title</td>
</tr>
<tr>
<td>A_CO_FIRST</td>
<td>Co-contact’s first name</td>
</tr>
<tr>
<td>A_CO_MID</td>
<td>Co-contact’s middle initial</td>
</tr>
<tr>
<td>A_CO_LAST</td>
<td>Co-contact’s last name</td>
</tr>
<tr>
<td>A_FAX</td>
<td>Fax number</td>
</tr>
<tr>
<td>A_CARPHONE</td>
<td>Car phone</td>
</tr>
<tr>
<td>A_HOMEPHON</td>
<td>Home phone</td>
</tr>
<tr>
<td>A_PAGER</td>
<td>Pager number</td>
</tr>
<tr>
<td>R_PREFIX</td>
<td>Your personal title</td>
</tr>
<tr>
<td>R_LAST_NAM</td>
<td>Registered owner last name</td>
</tr>
<tr>
<td>R_FIRST_NA</td>
<td>Your first name</td>
</tr>
<tr>
<td>R_INITIAL</td>
<td>Your middle initial</td>
</tr>
<tr>
<td>R_TITLE</td>
<td>Your title</td>
</tr>
<tr>
<td>R_HOMEPHON</td>
<td>Your home phone</td>
</tr>
<tr>
<td>R_WORKPHON</td>
<td>Your work phone</td>
</tr>
<tr>
<td>R_WORK_EXT</td>
<td>Your work extension</td>
</tr>
<tr>
<td>R_CARPHONE</td>
<td>Your car phone</td>
</tr>
<tr>
<td>R_FAX_NUMB</td>
<td>Your fax number</td>
</tr>
<tr>
<td>R_STREET</td>
<td>Your street address</td>
</tr>
<tr>
<td>R_CITY</td>
<td>Your city</td>
</tr>
<tr>
<td>R_STATE</td>
<td>Your state</td>
</tr>
<tr>
<td>R_ZIP</td>
<td>Your Zip Code</td>
</tr>
<tr>
<td>R_COMPANY</td>
<td>Your company</td>
</tr>
<tr>
<td>R_LP_FIRST</td>
<td>Your assistant 1 first name</td>
</tr>
</tbody>
</table>
Contact and Customer Merge Fields

The following fields are available to insert into letters that have a letter type of Both. These letters can be sent to both customers and contacts. The following fields are common between the customer and contact database fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M_PREFIX</td>
<td>Personal title (Mr., Mrs., etc.)</td>
</tr>
<tr>
<td>M_LAST_NAM</td>
<td>Last name</td>
</tr>
<tr>
<td>M_FIRST_NA</td>
<td>First name</td>
</tr>
<tr>
<td>M_MID</td>
<td>Mailing initial</td>
</tr>
<tr>
<td>M_COMPANY</td>
<td>Company</td>
</tr>
<tr>
<td>M_ADDRESS</td>
<td>Mailing street address</td>
</tr>
<tr>
<td>M_CITY</td>
<td>City</td>
</tr>
<tr>
<td>M_STATE</td>
<td>State</td>
</tr>
<tr>
<td>M_ZIP</td>
<td>Zip Code</td>
</tr>
<tr>
<td>M_ACTION</td>
<td>Next Action field</td>
</tr>
<tr>
<td>M_EMAIL</td>
<td>E-mail address</td>
</tr>
<tr>
<td>M_TELEPHON</td>
<td>Telephone number</td>
</tr>
<tr>
<td>M_WORK_EXT</td>
<td>Telephone extension</td>
</tr>
<tr>
<td>M_DEAR</td>
<td>Salutation (Dear Mr. Smith)</td>
</tr>
<tr>
<td>G_DATE</td>
<td>Current date</td>
</tr>
<tr>
<td>G_NAME1</td>
<td>Full name of customer or contact</td>
</tr>
<tr>
<td>G_NAME2</td>
<td>Full name of co-customer or co-contact</td>
</tr>
<tr>
<td>GREFER</td>
<td>Person referring customer</td>
</tr>
<tr>
<td>R_PREFIX</td>
<td>Your personal title</td>
</tr>
<tr>
<td>R_LAST_NAM</td>
<td>Your last name</td>
</tr>
<tr>
<td>R_FIRST_NA</td>
<td>Your first name</td>
</tr>
<tr>
<td>R_INITIAL</td>
<td>Your middle initial</td>
</tr>
<tr>
<td>R_TITLE</td>
<td>Your title</td>
</tr>
<tr>
<td>R_HOMEPHON</td>
<td>Your home phone number</td>
</tr>
<tr>
<td>R_WORKPHON</td>
<td>Your work phone number</td>
</tr>
</tbody>
</table>
R_WORK_EXT  Your work extension
R_CARPHONE  Your car phone
R_FAX_NUMB  Your fax number
R_STREET    Your street address
R_CITY      Your city name
R_STATE     Your state
R_ZIP       Your Zip Code
R_COMPANY   Your company
R_LP_FIRST  Your assistant 1 first name
R_LP_LAST   Your assistant 1 last name
R_LP_FIR2   Your assistant 2 first name
R_LP_LAST2  Your assistant 2 last name
R_PAGER     Your pager number
R_EMAIL     Your email address
R_WEBSITE   Your website address
MERGE1      User-defined merge field 1
MERGE2      User-defined merge field 2
MERGE3      User-defined merge field 3
MERGE4      User-defined merge field 4
MERGE5      User-defined merge field 5
Appendix A

Signature Scanning Template

Sign your name in the box below and then scan this page. Use scanning or other graphic software to set signature dimensions to about 134 pixels high at 300dpi. This image must be saved as a bitmap file. For photos, dimensions should be about 324x414 pixels at 300 dpi.

Note: Do not touch or cross the borders when signing in the box below. Allow some space between your signature and the border so that the scanner can select the signature without including the border.

Market Focus offers signature scanning services for a fee of $25 per signature. Please mail us the original signature(s) (signed in the box above) along with your payment. The scanned signatures can be sent to you via e-mail or on diskette. Please indicate your delivery preference with your request.

Mail the order to:

Market Focus
10650 Scripps Ranch Blvd #121
San Diego, CA 92131
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