



MEMOS Database

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



JOBZ! Home

JOBZ!	ADDRESS	MEMOS
Go To = 1 / 12 24 Seven - JOBZ! Campaign Work Type = << < > >>		
Modified Today	Friday, February 19, 2016	Jim Taylor
24 Seven - JOBZ! Campaign Work Type	In Estimating	11 by Seventeen - A JOBZ! Digital Est
11 by Seventeen - A JOBZ! Digital Est	In Estimating	11 by Seventeen - Campaign Demo

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

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

GLOBAL LITHO
2983 Calle Ocho, Carpenters, CA 95013
408-666-7356
jim@carpedata.com
www.carpedata.com

Pickup From
Mr. Serge Protector
24 Seven
1999 S. Bascom Ave. Suite 700
Campbell CA 95008
408-666-7356 103

Date: 2/19/2016
Job No: 01-21778
24 Seven Memos Dat
Issued By: Jim Taylor
Route To: Production

Items
Files & Lasers
Digital Proofs
Imposed Color Proofs
Ink Drawdowns
(Select these items from a check-box list)

Arrival Date: 2/19/2016
ASAP Rys
Via Courier

Special Instructions:
When you are ready to go, select the Output pull-down, and either choose one there, such as Memo, or select Output Menu to see all the possible formats.
From whatever format you selected, pull down Output again and decide among including a simple Email, Email PDF, PDF, or Print.
Of course, there is a HELP button at the top of the INPUT screen with callouts

CARPE DATA
2983 Calle Ocho, Carpenters, CA 95013
408-666-7356
jim@carpedata.com
www.carpedata.com

February 18, 2016

Mr. Jim Taylor
Carpe Data
5863 Calle Ocho
Carpenters CA 95013

Greetings Jim,

JOBZ! users who don't use the MEMOS module are overlooking a powerful and easy to use communications tool.

MEMOS is a correspondence database that is capable of producing a wide range of formal memos and formal business letters to purchase orders and project schedules.

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

But the really cool thing is that each memo can be automatically linked to a contact in your ADDRESS module, or to a specific job in the JOBS module, or both. So you can have a permanent record of your communications at your fingertips.

Click the MEMOS tab and then from the red New button, select New Memo, and you will be taken to the INPUT screen. Select a company name from your contacts, then a person at that company. Or, select a contact by name instead of company. Their address information is placed automatically.

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

Compose the memo by entering a subject in the Re: field. Choose a Salutation, Signoff and your Title, or enter whatever you like in these fields. In the Text field, type your text.

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

Always At Your Service.

Jim Taylor
Jim Taylor
Developer

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

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

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

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

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

Their address information is placed automatically.

4) Rolodex card is a button to contact record in ADDRESS

The screenshot shows the MEMOS input screen with several red arrows pointing to specific elements:

- Arrow 1 points to the 'To' field.
- Arrow 2 points to the 'To Same Contact' button.
- Arrow 3 points to the 'Same Job' button.
- Arrow 4 points to the 'Rolodex card' button (a Rolodex icon with a green plus sign).

The form contains the following fields and buttons:

- Go To: 1 / 46
- Buttons: Organize, New, Actions, Output, Find..., HELP
- Memo: 7307
- Date: 2/19/16
- From: Jim Taylor
- Location: Southern California
- Follow Up: []
- Representing: JOBZI for Printing Sales
- To: []
- Buttons: To Same Contact, Same Job, Same Job #, Book
- Company: Carpe Data
- Name: Mr. Jim Taylor
- Address: 5563 Calle Ocho
- City/St/Zip: Carpinteria CA 93013
- Phone: 408 666-7356
- Fax: []
- Email TO: jim@carpedata.com
- Email CC: []
- Re: MEMOS Tutorial
- Word Count: 447
- Job#: []
- Sal: []
- Signoff: []
- Title: []
- PS: Text, Preview, Private, Plan, Xmittal, Templates, Invoice, Graphic
- Text: JOBZI users who take advantage of the MEMOS module know that it is a powerful and easy-to-use communications tool. MEMOS is a correspondence database that is capable of producing a wide range of formats, from quick memos and formal business letters to purchase orders and project schedules. Documents are branded with your letterhead and include your personal signature. Emailing, printing on paper or emailing a PDF is a snap. But the really cool thing about MEMOS is that is that each of your missives can be automatically linked to a contact in your ADDRESS module, or to a specific job in the JOBS module, or both. So you can have a permanent record of your communications at your fingertips.

MEMOS Input Screen

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

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

ADDRESS Input Screen

The screenshot shows the ADDRESS input screen for a contact named Ms. Paige Turner. The contact details include: Name (Ms. Paige Turner), Title (Designer), Company (11 by Seventeen), Department (Marketing), Parent Co. (Carpe Data), Address (5563 Calle Ocho, USA), City/State/Zip (Carpinteria, CA 93013), Email (support@carpedata.com), Office Phone (408-666-7356), Cell Phone (408-666-7356), and Cust. # (36805). The Category is set to Account and Vertical to Agency. Below the contact details is a MEMOS tab, which is highlighted by a red arrow labeled '1'. The MEMOS tab contains a list of memos, with a 'NEW MEMO' button and a search bar. A red arrow labeled '2' points to the 'NEW MEMO' button. A red arrow labeled '3' points to the list of memos, which includes: JOBZ! Project (11/20/15), Banking Issue (10/29/15), MSM Brochure 24p (10/20/15), Security (9/1/15), Introductory Letter (7/14/15), Active Sales Management using JOBZ! (6/10/15), and Master JOBZ! Implementation Checklist (2/25/15).

JOB input screens (SPEX / QUOTE / ORDER)

The screenshot shows a JOB input screen with tabs for Project, Memos, Contact, and To Do. The Memos tab is active, showing a 'New' memo titled 'Memos Database Tutorial' with a pickup date of 2/19/16. Below the tabs, there are fields for 'Invoice Contact' (Serge Protector) and 'Invoice Cust #' (36499). A red arrow labeled '3' points from the memos list in the previous screenshot to the Memos tab in this screenshot.

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

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

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

MEMOS Input Screen

The screenshot shows the MEMOS Input Screen with the following fields and actions:

- 1** Points to the **Re:** field containing "MEMOS Tutorial".
- 2** Points to the **Sal.** field containing "Greetings" and the **Signoff** field containing "Regards,".
- 3** Points to the **Text** field containing the following text:
JOBZI users who take advantage of the MEMOS module know that it is a powerful and easy-to-use communications tool.
MEMOS is a correspondence database that is capable of producing a wide range of formats, from quick memos and formal business letters to purchase orders and project schedules.
Documents are branded with your letterhead and include your personal signature. Emailing, printing on paper or emailing a PDF is a snap.
But the really cool thing about MEMOS is that each of your messages can be automatically linked to a contact in your ADDRESS module, or to a specific job in the JOBS module, or both. So you can have a permanent record of your communications at your fingertips.
- 4** Points to the **Templates** tab in the **PS:** menu.

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

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

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

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

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

