Business Solutions

CONTACT MANAGEMENT #100 (Series)

Course Objective: At the end of the three day course, each student will have achieved a solid understanding of building and managing a comprehensive contact file. File will be networkable and shareable. Solution may be used in standalone or group environments.

CONTACT MANAGEMENT #101
Establish the foundations to build a solution. Here we go over all the required things needed to build a solution. In this first day we explore all the necessary decisions that go into building a solution. We will study examples and review options.

A) TERMINOLOGY
    Database
    Tables
    Relationships
    Records
    Fields
        Text
        Number
        Date
        Time
        Calculation
        Summary
    Layouts
        Windows
        Popups
        Cards
    Themes
    Format
    Conditional
    Functions
    Globals
    Variables
    Scripts
    Value Lists
    Navigation
    Dashboard
    Security
    If Statements
    Boolean

B) DECISIONS
    Purpose
    Contact
    Firm/Organization
    Core
    Security

C) WORKFLOW
    How it is used
    Access
    Navigation
    Interaction
    Shortcuts
    Story Board

D) HOMEWORK

CONTACT MANAGEMENT #100 (Continued)

CONTACT MANAGEMENT #102
We start the building process of your solution.

A) TABLES
    Table Nomenclature
    Identification

B) FIELDS
    Field Nomenclature
    Default Fields
    Field Types

C) RELATIONSHIPS
    Connectors
    Controls
    Options

D) LAYOUTS
    Layout Nomenclature
    Folders
    Form
    List
    Table
    Report
    Visibility

E) NAVIGATION
    Home
    Consistency
    Bars
    Buttons
    Security

F) WORKFLOW
    Home
    Dashboard
    Admin

G) Homework

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CONTACT MANAGEMENT #100 (Continued)

CONTACT MANAGEMENT #103
Adding functionality and launching to your solution.

A) Scripts
    Script Nomenclature
    Folders
    Separators
    Visibility

B) Functions
    Standard
    Custom

C) Formatting
    Conditional
    Hidden

D) Launching
    Hosting
    Access
    Security

E) Maintenance
    Regular
    Updates

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