

(Electronic Download Version)

Quickstart Guide – Electronic Book of Lists CM

Welcome!

Thank you for purchasing the Electronic Book of Lists data. This data is an electronic version of our popular *Book of Lists* product. The data you have purchased entitles you to a free licensed version of the Book of Lists CM software included on your data CD. We have provided multiple file formats for use with most popular software packages like ACT! and Microsoft Office.

Getting Started.

You will see a choice to download either the **WINDOWS (EXECUTABLE)** file or the **MACINTOSH (ZIP FILE)**

If you have a PC, click on the **WINDOWS (EXECUTABLE)** file. You will then receive a dialog box that gives you the choice to **Open the file from its current location** or **Save this file to disk**. Please select the **Save this file to disk** option.

Upon doing this you will receive another dialog box that gives you the opportunity to save the file to wherever you want to on your computer. If you are not familiar with this process, please save the file to your “Desktop” (To do this, near the top of that dialog box you will see the text: “Save in:” to the right of that text is a white box with a destination on your computer. Usually it will say “My Documents” but not necessarily. To the right of that is a drop down arrow. Click on the drop down arrow and you will see all of the various locations on your computer. At the very top of that list is “Desktop”. Select “Desktop” and click on “Save”)

*Note for Macintosh users: The **Book of Lists Contact Management** software is not compatible to use with a Macintosh. If you are using a Macintosh, select the **MACINTOSH (ZIP FILE)** and save it to your desktop. At this point you need to unzip the file and save the contents to your desktop. You then can import the data files into whatever application you are planing to use them with.

At this point you need to decide if you want to download the **Book of Lists Contact Management** software (EBOL-CM). If you do, proceed down to the link that reads: Click here to download the **Book of Lists Contact Management** software. When you click on Click here you will receive the same dialog box as before. Please save the file to your Desktop.

At this point you have downloaded everything you need and you can proceed to install the product you have purchased onto your computer.

The first thing you need to do is run the windows executable file. Go to your desktop and find the file that reads (the city you purchased.exe ex: **charlotte.exe**) Double click on this file and you will receive a dialog box that reads: “WinZip Self-Extractor” then click on the “Unzip” button. You will then get a dialog box that reads: “8 file(s) unzipped successfully” click on the “OK” button. At this point you will see the License agreement. You can read this now or print it to read later. Close the dialog box with the license agreement.

OK, now you are asking “what just happened?”

What just happened was a folder was created on your C: drive called “Book of Lists”. That is where your data files are now located.

If you did not download the **Book of Lists Contact Management software and you do not intend to use it, you have now completed the install process. If you did download the **Book of Lists Contact Management** software, please continue to the next section.

Please use the following steps to install the **Book of Lists Contact Management** software.

1. Please go to your desktop and locate the file “bolcm.exe”. Double click on the file and follow the installation instructions. Upon completion of the installation you will see a dialog box that reads: “Installation Complete”.
2. Click the finish button and the software will automatically launch. You will then see a dialog box that reads: “No Data Installed”.
3. Click on the “Install Data Now” button. You will then see a dialog box that reads: “Install Product”.
4. Click on the “Locate Files” button. You now will see a dialog box that reads: “Open” and at the “Look In” it is pointing to your C: drive. Locate the folder on your C: drive called “Book of Lists” and double click on that folder. You then will see an ebl file.(Ex” EBLcharlotte) if your computer is showing file extensions, the file will have a .ebl extension on it.
5. Click on that file and click “Open”. You will now receive another dialog box that reads: “Install Product”. This one will have a “Process” button on it. Click the “Process” button and it will import the data into the software. When the install is complete, the software will then be ready to use. For further instructions for using the **Book of Lists Contact Management** software please refer to the help section of the software. This is accessible from the Book of Lists CM – Control Center

How to use the Book of lists CM Software

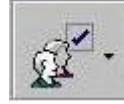
****NOTE:** Detailed instructions for using the software can be found by clicking on Help from the Book of Lists CM – Control Center. This is just a short tutorial on how to use two of its most common functions: **Printing Labels** and **Printing out an Individual List**.

Before doing either of these function, you need to “mark” the records that you want to work with. This is what we will cover first.

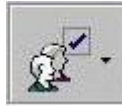
Marking Records:



1. Click on the “Book of Lists CM” icon on your desktop to start the software.
2. From the Book of Lists CM Control Center, click on “View” and then “View Data”.
2. At this point the “Data View” screen will appear:
3. Click on the drop down arrow on the “All Lists” drop down box.
4. Choose the individual list that you want to mark the records for and click on it.



5. Go to the button with the two heads and the check mark and click the drop down arrow:
6. Go all the way down to the bottom of the drop down list and click on “Un-Mark All Contacts For All Lists”. (This will clear out any previous records that have been marked.)



7. Click the drop down arrow a second time:
8. Click on “Mark All Contacts For This List”.
9. Close the “Data View” screen (click on the X in the upper right hand corner.) and return to the “Book of Lists CM Control Center”.
10. Click on “Tools” and then click on “Labels and Reports”. This will put you in the “Output Control Center.”

The Output Control Center is where you go to “*do something*” with the files you have marked. There are three choices on this screen:

1. Labels
2. Reports
3. Export

For Export, please see the Help section for more detailed instructions.

Labels:

1. Click on the “Labels” tab and choose your label type from the drop down menu.
2. Click the “Print” button at the bottom.
3. Next you will see a box that reads: “This process may take several minutes, please be patient...”click the “OK” button on this screen.
4. You will now see a preview screen for your labels. This is the screen that you actually print from. Click the “Print” button in the upper left hand corner to print your labels.

Printed Report:

1. Before you print your list you might want to change the sort order. To do this, click on the drop down arrow for “Sort Order” and choose the correct sort function. If you want your list sorted by rank,

choose "List Date, Rank" for the drop down menu.

2. Click on the "Reports" tab and then click "Print".
3. Next you will see a box that reads: "This process may take several minutes, please be patient..."click the "OK" button on this screen.
4. You will now see a preview screen for your report. This is the screen that you actually print from. Click the "Print" button in the upper left hand corner to print your report.

This has been a short tutorial on two of the more popular function of our CM software. For more information, please consult the "Help" section or call our technical support line at 866-367-9607.