

Rolodexing with Ease

ContactEase, Version 9.03c

Cole Valley Software

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www.colevalley.com

Price: \$350 single-user version; \$150 to \$250 for additional users (reduced price for Outlook sync or GroupWise data access); \$1,500 for security module; \$5,000 per SQL server (includes security module)
Windows 95/NT and up

Reviewed by John Heckman, the principal of Heckman Consulting located in Old Saybrook, Conn. The firm specializes in software integration and technology issues for small- to medium-size law firms.

ContactEase (formerly Metz Phones Pro) started out as a simple rolodex program and has gradually evolved into a networkable, SQL-based contact and relationship manager.

I have been using the program for a number of years, and its ease of use and feature set have always put it ahead of the pack.

For an end-user, the ease of use is exceptional. To find a record, simply type the first few letters of the person or



Hotkey Paste: Paste the layout for addresses, labels and other documents using this function.

company name (searches can be configured to find both).

To sort the list display, click on the column heading (the column setup is customizable by the user). Clicking on the tabs across the record display shows additional phone numbers and custom fields. Some custom fields are indexed and can be sorted on the list display.

One of the best features is "Hotkey Paste." From any Windows program, hit "Ctrl+Alt+P" to paste a selected layout (any number of custom layouts can be created) into the program. This can be used for addresses, labels, phone lists, e-mail addresses or name tags.

One of the most powerful features of ContactEase is "Categories." You can assign one or more categories to a given record and then generate lists by categories. This is an ideal way to keep holiday lists, newsletters or other categories such as vendors up-to-date.

ContactEase also offers extensive customization. You can choose what fields to put on the list display, as well as on the record display, and you can have an unlimited number of custom fields, which can be either free-form or part of a drop-down pick list. For law firms, it also offers a client/matter code that can be assigned to a contact.

Label and envelope printing are built-in, with all the Avery labels predefined. If your printer doesn't print a given label size correctly, you can adjust it with the label editor. ContactEase also features a number of custom reports, including "Daytimer," "Day Runner" and "Franklin" planners, and it's relatively easy to define your own additional custom reports or labels.

Third-Party Integration

ContactEase not only links with a Palm handheld and a Handspring Visor, but you can manipulate and re-assign existing Palm categories from within ContactEase. For example, you can select a number of contacts and batch assign them to your Palm categories. As far as I am aware, ContactEase is the only program to offer this functionality.

ContactEase integrates with any 32-bit Messaging Application Programming Interface (MAPI) enabled program, including Outlook, GroupWise and various fax programs, such as RightFax, Cheyenne's FaxServe or WinFax. It appears as an additional address book in those programs. If you are using older, 16-bit programs, you will need to upgrade.

Customer Relationship Management

The "Customer Relationship Management" functions allow the user to track a variety of activities (meetings, calls, notes), and includes a pop-up "Tickler," or alarm, feature to notify you of To-Dos, call-back notifications or meetings. It also includes a "Relations" function. On the principle that no one

is ever more than one or two people away from somebody you know, this lets you follow the trail of a friend who has a client who has a close relationship with an important potential client.

ContactEase's network security (an additional charge in the Access version) allows you to grant access to additional users on a field-by-field basis. For example, since the program has two "Notes" fields, you could have one for general notes and the other for private notes to which you (or whomever the administrator is) can prohibit others from accessing. In addition, you can select which individuals or groups are able to

	Company	Last
1	heck	Heck
2	heckman Consulting	Cantrell
3	Heckman Consulting	Heckman
4	Heckman Family	Bohan
5	Heckman Family	Heckman
6		Heckman
7		Heckman
8		Heckman
9		Heckman

Search and Find: Quickly look up a contact by typing the first few letters of a person's name.

see which records within the context of the available fields.

What are the downsides? The program is fairly expensive, and some firms might find the expense hard to justify. This problem is compounded for a firm that is already using some form of case management program with its own built-in rolodex feature that isn't MAPI-compliant. Implementing ContactEase along side such a program would create a double entry issue. This would not be a problem with Outlook, but could be one for firms using Amicus Attorney or Time Matters.

Every time I discover a new personal information manager (PIM)/rolodex program, I check it against ContactEase. So far, I have found nothing better suits the needs of a small- to mid-size law firm. E:]

Closing Argument

Pros: Ease of use; extensively customizable; record-level and network security.

Cons: Expensive; might create duplicate entries if using other case management products.

Verdict: This is the best rolodex/personal information manager I have found, but it's on the expensive side.