

Rolodex

Usage and Setup

Table on Contents

Introduction	2
Rolodex Setup	2
Tab: General	2
Tab: Types	2
Rolodex Usage	3
New Rolodex Entry	3
Inventory Location	4
Vendor Inventory	4
Edit Existing Rolodex Entry	5
Searching the Rolodex: Name Search	5
Searching the Rolodex: Company Search	5
Allow Partial Search: Check Box	6
Inventory Vendor Field	6

Introduction



Rolodex Module icon

This manual details the setup and usage of the Rolodex feature. The Rolodex can be accessed by clicking on **Auxiliary** from the list of choices on the main menu. The Rolodex Icon can be found in the Miscellaneous group of icons.

The Rolodex database is also used for the inventory vendors.

Rolodex Setup

Access the Rolodex setup window by clicking on the drop down arrow on the right side of the Rolodex icon. There are two primary steps to setting up the Rolodex, creating the types and importing department personnel.

Tab: General

The General tab allows department personnel to be imported into the Rolodex from the Personnel Module. Select the Personnel Type that the department personnel will be assigned to, most likely "Department Personnel". Click the Transfer Personnel to Rolodex button

NOTE: Within the Personnel Module, General Tab, the "Include in Rolodex" box must be checked in the Department Information section of the window for each individual in order for them to be added to the Rolodex.

When viewing the Rolodex notice that all personnel entered into the system will now appear in the Rolodex and have Department Personnel as the type.

Phone Picture Masking: This field is for Alpine Personnel only

Tab: Types

Rolodex types refers to the category an individual Rolodex entry will be assigned to. Examples of types are Department Personnel, Vendors, Fire Departments and Utilities. Follow the instructions below to create Rolodex Types.

1. Click on the drop down arrow on the right side of the Rolodex icon.
2. Click on the Type tab.
3. Click on **New**.
4. Enter the Type Description such as Department Personnel
5. Click **Save**.
6. Repeat steps 3-5 for additional entries.

Rolodex Usage

Access the Rolodex by clicking on the Rolodex icon. All entries are listed in alphabetical order by default.

Note: The “Inventory Vendor?” check box must be checked if you want this Rolodex entry to appear in the list of inventory vendors.

New Rolodex Entry

Follow the steps below to create new entries in the Rolodex.

1. Click the New button at the bottom left corner of the window.
2. Enter the appropriate name and address information.
3. Select the Inventory Type from the drop down list. Note that types must be entered in the Rolodex setup window as described in an earlier section of this document.
4. Select the **Inventory Vendor?** check box if a particular vendor should be added to the list of available vendors under the Purchasing tab of the Inventory Module.
5. Enter the desired phone number information.
6. Enter any narrative information if desired.
7. Click **Save**.
8. Click **Close**.

The screenshot displays the 'Resource and Contacts Management' window in the Alpine RedNMX Demonstration software. The window is titled 'Resource, Contacts, Etc.' and contains the following sections:

- Address:** Vendor Code (CFE), Company (Churchville Fire Equipment), Address (100 Main Street, Suite 212), City (Rochester), State (NY), and Zip (13231).
- General Information:** Type (Vendor: Inventory), Description (Fire Equipment Vendor in Rochester), Resources for Search (Hose, Fire Extinguishers, Ladders, Nozzles, Hurst), and Location (Vendors->Churchville Fire Equipment). The 'Inventory Vendor?' checkbox is checked.
- Phone Numbers:** Name (Martin, Robert), Home (583-213-1232), Extension (12), Additional (President of Company), Work (585-213-2132), Extension, Email (Bob@ChurchvilleFire.com), Cell (585-768-9023), Extension, Fax (585-123-2142), Extension (21), and Pager (585-129-0346), Extension.
- Vendor Narrative:** A text area containing the text: 'Found in 1921, local family run business. Part of NY state bid and contracts'.

At the bottom right of the window, there are 'Save' and 'Close' buttons.

The following fields are entered in the Rolodex:

Field Name	Description	Requirement	Comments	Example
Code	Unique code.	Optional	Enter a unique code.	N/A
Company	Name of the company	Optional	N/A	N/A
Address	Address of the Vendor	Optional	N/A	N/A
Type	Type of Vendor	Optional	N/A	N/A
Description	Brief description of the vendor	Optional	N/A	N/A
Location	The location in the inventory location management system of the vendor.	Optional	Use the drop down to find the location.	N/A
Resources for Searches	Key words to search on.	Optional	Enter key words that apply to this vendor. The example is for an SCBA vendor.	AIR BOTTLE, SCBA, HYDRO, MASK.
Inventory Vendor?	This flag designates whether the vendor will show throughout the inventory system.	Optional	Check it off to allow for usage in inventory.	N/A
Name	Name of the Person.	Optional	N/A	N/A
Additional	Additional Persons.	Optional	N/A	N/A
Phone Numbers	Phone Number	Optional	N/A	N/A
Extensions	Extensions	Optional	N/A	N/A
Vendor Narrative	Unlimited text entry field to record comments about the vendor.	Optional	N/A	N/A

Inventory Location

Press the Create Location button to automatically create a location entry in the vendor list.

Vendor Inventory

Select this tab to view the inventory assign to the selected vendor.

Edit Existing Rolodex Entry

1. Locate the entry to be edited in the Rolodex list.
2. Double click on the desired entry.
3. Edit any necessary information.
4. Click **Save**.
5. Click the **Close** button in the lower right corner of the edit window.

Searching the Rolodex: Name Search

Use the search fields on the lower half of the screen to find a specific entry or narrow the list of entries.

1. Enter a full or partial last name in the Name field.
2. Click **Find Records** at the lower left corner of the window.
3. Matching records are displayed in the list area.

Searching the Rolodex: Company Search

1. Enter a full or partial company name in the Company field.
2. Click **Find Records** at the lower left corner of the window.
3. Matching records are displayed in the list area.

Allow Partial Search: Check Box

Checking this box will search will expand the name and company searches to include any instance of the character or characters entered in the search fields. For example if “st” is entered in the name field, the system will search any name, first or last, that includes that character string, such as **S**t~~e~~phen, Chri ~~s~~t~~o~~pher or West**c**ott.

If the Allow partial search box is not checked the system will search for entries where “st” is the beginning of the last name or company name. For example **S**tone and **S**taples Office Supply.

Note that information cannot be entered into both the name and company fields simultaneously.

Inventory Vendor Field

Enter a **Y** in this field if you are searching for a vendor that appears in the Inventory Module list. To appear in this list, the Inventory Vendor box must be checked on the Rolodex entry screen.