

Contacts Journal

Frequently Asked Questions (v 3.6.1)

For questions or comments, please contact support@zaal-llc.com

Getting Started	5
<i>Why should I use Contacts Journal CRM?.....</i>	<i>5</i>
<i>How should I start using Contacts Journal?.....</i>	<i>5</i>
Contacts and Contact Groups.....	6
<i>Do the contacts in Contacts Journal stay in sync with the Contacts app? ...</i>	<i>6</i>
<i>When I add new contacts in the Contacts app, will they automatically show up in Contacts Journal?</i>	<i>6</i>
<i>How do I add contacts from Outlook / Exchange / Google Contacts?</i>	<i>6</i>
<i>How can I create a new group of contacts?</i>	<i>6</i>
<i>How do I filter my contacts list by Groups?</i>	<i>7</i>
<i>How do I edit an existing Group?</i>	<i>7</i>
<i>Why don't I see all my contacts when I try to add contacts to a Group?</i>	<i>7</i>
Map View and Location	8
<i>How can I capture location data with my notes?</i>	<i>8</i>
<i>How are pins on the Map view populated?</i>	<i>8</i>
<i>How do I search for contacts in a particular zip code or city?</i>	<i>8</i>
Calendar	9
<i>How do I add To-Dos to my iPhone calendar?</i>	<i>9</i>
<i>Do the To-Dos keep in sync with my iPhone / iPad calendar?</i>	<i>9</i>
Attaching Documents.....	10
<i>How can I attach Documents to my contacts?</i>	<i>10</i>
<i>How do I rename the files in Contacts Journal?</i>	<i>10</i>
User Fields.....	11
<i>What are "User Fields"?</i>	<i>11</i>

<i>How do I create a new “Field”?</i>	11
<i>How do I use the “List” field type?</i>	11
Sync with iCloud	12
<i>Before you begin using iCloud, please read these important notes:</i>	12
<i>How do I start syncing data using iCloud?</i>	12
<i>How does iCloud sync work?</i>	13
<i>How long does iCloud take to download changes from other devices?</i>	13
<i>How do I turn off iCloud syncing from within the app?</i>	13
<i>Can I switch iCloud accounts on the device while using the app?</i>	13
<i>What happens if there is a conflict in the data?</i>	14
<i>How do I backup my iCloud data?</i>	14
Troubleshooting iCloud	14
<i>What should I do if the app gets stuck at any point?</i>	14
<i>How should I do an iCloud Reset?</i>	14
<i>How do I restore data from an iCloud Backup</i>	15
<i>I tried syncing CJournal to iCloud, but it doesn’t connect</i>	16
<i>Upgrading to iOS8 and iCloud Drive</i>	16
Sync With Dropbox	17
<i>How do I use Dropbox to sync between the iPhone and iPad versions?</i>	17
<i>How can I collaborate with others to manage a shared list of contacts?</i>	18
<i>How do I make sure I don’t lose any data when syncing with Dropbox?</i>	18
<i>After Fetch from Dropbox on one of my devices, some of my contacts don’t have images and/or don’t sync with the Contacts app?</i>	18
Data Backup / Restore	19
<i>How do I backup my data from the app?</i>	19

<i>How do I restore data from a backup?</i>	19
Reporting	19
<i>How do I export my data into a report?</i>	19
<i>What sort of printer do I need to print my data?</i>	19
More	20
<i>How do I transfer data from the Lite version to the Paid version?</i>	20
<i>Can you record the contents of emails / messages, or incoming calls?</i>	20
<i>How do I add password-protection?</i>	20
<i>I want to create Private Contacts, but it still asks for permissions to access my Contacts data</i>	20
<i>Can I change existing contacts to Private, and vice versa?</i>	21
<i>I added new contacts in my Contacts app, but they're not available in CJournal</i>	21
<i>How do I re-assign a Log / ToDo / Document to another contact?</i>	21
<i>How do I import my contacts list from Excel?</i>	21
<i>How do I use Contacts Journal on my desktop?</i>	22
<i>Many of my contacts don't show up on the Map</i>	22
<i>How can I setup my iPad to make calls using my iPhone</i>	22
Useful Shortcuts	23

Getting Started

Why should I use Contacts Journal CRM?

Contacts Journal CRM helps you manage your relationships with your network of clients and contacts. It's particularly useful for:

- customer relationship management for small businesses
- tracking conversations with your clients
- managing your sales pipeline
- keeping a call log
- business networking
- professionals like lawyers, real-estate agents, teachers, nurses etc.
- tracking documents against your clients
- keeping a history of interactions with your friends and family

As long as you are someone who interacts with many people, professionally or personally, Contacts Journal will help you manage your relationships, and keep you on top of things.

Contacts Journal is available on iPhone, iPad and Mac. For more details about the Mac app, please consult the Mac app FAQ at <http://contactsjournal.uservoice.com/>

How should I start using Contacts Journal?

Start by importing contacts into Contacts Journal. To import contacts, press the + button on the first page. You can then:

- "Import from Contacts" to add contacts from your Contacts app
- "Create Contact" to create a contact from scratch; any new contacts you create will also be added to the iPhone contacts list
- "Create Private Contact" to create a private contact, which will only be saved and visible inside Contacts Journal
- "Import vCard": to import a vCard file from your computer, over WiFi

You can then add Logs, To-Dos, Documents and Fields for your contacts:

- a Log is a record of a meeting or conversation with the contact. You can add a date, title, location data, and/or a note to capture the event. This is a great way to build your history of who you met, where you met them, what you talked about
- a ToDo is a great way to set a follow-up with a contact. You can set an

- alarm for your To-Do, schedule appointments to your Calendar, create repeating To-Dos, add location, and add notes as well
- a Document is a file that you can attach to your contacts. You can store important contracts, presentations, even media files, and view them from within the app.
 - a User Field lets you store custom data for the contact. You define your own Field first (for e.g. Age, Status, Deal etc), and attach values for these fields per contact.

Contacts and Contact Groups

Do the contacts in Contacts Journal stay in sync with the Contacts app?

Contacts that were imported into Contacts Journal will keep all the information in sync with the Contacts app, so you can update phones, emails, notes etc without having to make the changes in two places.

When I add new contacts in the Contacts app, will they automatically show up in Contacts Journal?

When we detect new contacts in the Contacts app, we pop up an alert asking you if you want to import them into Contacts Journal. You can then see a list of these new contacts and import them if you wish.

How do I add contacts from Outlook / Exchange / Google Contacts?

To add contacts from a variety of sources, go to Settings app -> Mail, Contacts, Calendars -> Add Account, and pick the appropriate account (for Google Contacts, pick Exchange from the list instead of Gmail). After setting up the account to sync with your Contacts app, these contacts will become available to be imported inside Contacts Journal!

How can I create a new group of contacts?

To create a new group, press the Groups button from the main Contacts list, then press Edit. Now, choose “Create Contact Group” or “Create Private

Group”. Then type in a name for the group, and on the next page, select the contacts you want to add to this group.

- Private Groups are saved and visible from within Contacts Journal only. You can select any contact you have imported into Contacts Journal.
- Contact Groups are saved to your Contacts app directly, but there are limitations: a) groups are added to only your default Contact account, b) you can only select contacts that belong to that default contacts account, which have been imported into Contacts Journal c) if your default contacts account is an Exchange account, you cannot create or edit a group at all.

You can also create a new Private Group from the main Contacts page. Press the Edit button, select your contacts and press the “New Private Group” button.

How do I filter my contacts list by Groups?

Selecting one of the groups from the Groups page will filter the Contacts Journal list by the members of that group. You can also choose to “Filter by Active” or “Filter by Private Contacts”. All your Logs, ToDos and pins on the Map View will also be filtered by the group you have selected.

How do I edit an existing Group?

When a group is selected, press Edit. Now select the contacts that you wish to add to this group, and deselect the ones that you wish to remove. Groups from Exchange accounts cannot be edited at the moment, due to a limitation of the platform. To rename your groups. On the Groups page, press Edit and select the group you wish to rename.

Why don't I see all my contacts when I try to add contacts to a Group?

You can only add those contacts that exist in the account in which that Group exists. For e.g. if you sync contacts from iCloud and MS Exchange, when you add or edit an iCloud group, you will only be able to select contacts from iCloud.

Map View and Location

How can I capture location data with my notes?

When adding a Log or To-Do, select the Location field. Press the + button to add a new Location, or choose from the existing list of locations. Your current location will be detected by default. To choose a different location, you can edit the Address field directly, or press the Edit button and choose Pick on Map to expand the map and drag the pin around.

Please make sure you enable Location Services for Contacts Journal. If you have turned it off, you can re-enable it from the Settings app.

You can also add, rename, reorder and delete your list of Locations from the More -> Manage Data -> Locations section.

How are pins on the Map view populated?

On the Map View, you see two types of pins: those saved manually in the Location field when adding Logs and ToDos, and those that are mapped from your contacts' address fields. The purple pins have one or more Logs saved at that location, and red pins have one or more To-Dos saved. Select the pin, and press the blue button in the callout to see more details of the Logs and To-Dos saved there.

By default, the contacts' addresses are shown as green pins. You can change the color of the contact pin by selecting the pin, and then pressing the blue button in the callout, to see the Change Pin Color option. You can also get directions to that contact, or go directly to that contact's page.

How do I search for contacts in a particular zip code or city?

From the Map View, select the Locations button. This will give you a list of all your saved Locations, as well as Contact addresses, sorted by distance from your current location. You can search on this page for any term in the address field, like zip code, city name, state, etc. Selecting a location from this list will zoom the map view to this location.

Calendar

How do I add To-Dos to my iPhone calendar?

When adding or editing a To-Do, tap on the Calendar row. On this page, make sure the Linked switch is On, choose the end time for your meeting, press the Calendar row to choose a different calendar if you want, then go back to the To-Do page and Save.

You can change the settings in More -> Calendar Settings -> set Add New To-Dos to Calendar to always add a new To-Do into your default calendar.

Do the To-Dos keep in sync with my iPhone / iPad calendar?

To-Dos that have been added to the iPhone / iPad Calendar will continue to sync with the calendar entry. If you change the time, or the note field in the calendar, it will update the To-Do, and vice versa. To-Dos that are completed or deleted will be removed from the Calendar (you can toggle this off from More -> Calendar Settings).

Note that there are some limitations:

- If your To-Do has an alarm, it will ring from Contacts Journal, and will not be set in the calendar
- If your To-Do has a repeat interval setting, the repeat intervals will not show up in the calendar
- In some cases, the To-Do might not be able to sync up with the calendar entry. This can happen if you transfer your data to another device that doesn't have the same calendars present. In those cases, the To-Do's Calendar row will say "Link can't be retrieved".

Attaching Documents

How can I attach Documents to my contacts?

There are 4 easy ways to attach documents to your contacts. From the contact's Files tab, press the + button and select one of these options:

- Import from Dropbox: this will open the Dropbox app on your device (if installed) and you can select the file you want to import into CJournal
- Import from Camera Roll: select a photo from your iPhone photo library
- Transfer over WiFi: transfer files from your computer to your device over WiFi. Your computer has to be on the same WiFi network as your iPhone / iPad
- (iOS8-only) Import from iCloud Drive: import documents from other apps that support iCloud Drive

You can also transfer files from other apps into CJournal. To transfer attachments from Mail, press and hold on any attachment and then select the "Open In" button. Select CJournal from the list of apps, and then select a contact to attach the document to.

Other apps on the iPhone / iPad also support the "Open in" button, and you can follow the same steps as above to transfer documents into CJournal

How do I rename the files in Contacts Journal?

Press and hold on a file name for a couple of seconds from the Files list, and it will pop up a small menu with options. Press the Rename button and type in a different name.

User Fields

What are “User Fields”?

User Fields lets you add your own customized data fields to the app. You can then attach these custom fields to your contacts. The User Fields show up in the Info tab for the contact.

This allows great flexibility to how you want to use Contacts Journal for your own needs. Here are examples of the types of Fields you can create:

- Account Number
- Sale Value
- Status
- Due Date
- Amount Due
- Age
- Spouse Name

How do I create a new “Field”?

You can create a new Field from the More -> Manage Data -> Fields page. Give the field a Name, a Type and an optional Default value. Then, on any contact’s Info tab, you can press the + button to attach the field to that contact, and give it some value.

How do I use the “List” field type?

You can use the List field type if you want to define a fixed number of values that the field can be in. For e.g. you can define a “Status” field, choose List type, and add “Open”, “Active”, “Rejected”, “Closed” to the Field List. Now, you can attach one of these value to the Status field for any contact.

Can I attach the same field multiple times to one contact?

As of now, you can only attach a field to a contact only once. If you want to attach the same field more than once, you’ll have to create a new field from the More -> Manage Data -> Fields page.

Sync with iCloud

Before you begin using iCloud, please read these important notes:

- iCloud Sync lets you automatically and seamlessly sync your data between multiple iOS devices, including iPad, iPhone and Mac
- You need to have signed in to the same iCloud account on all your devices
- Your data is transferred in the background with some delay. It can take up to a few minutes for your changes from another device to download, depending on your network speed
- It is recommended to run at least iOS8 and Mac 10.10 (for Mac app), and also to enable iCloud Drive [you can check this in the iOS Settings app -> iCloud -> make sure iCloud Drive is "On"]
- It is recommended to not have the app open at the same time on multiple devices while editing data. This can cause data conflicts that might not resolve correctly

How do I start syncing data using iCloud?

First, select which device's data you want to upload as the starting point. Make sure this device has the most up-to-date data. Then, from More -> Sync Settings, press the "iCloud" option. If you have Dropbox enabled, you should first Unlink the Dropbox account to access the iCloud option.

Once you confirm the "First Time iCloud Sync" alert, this will start migrating your data from this device to iCloud. This can take a few minutes, depending on the size of your database. You also need a working WiFi connection to do the initial upload.

After the first sync is complete, wait a couple of minutes before you connect your other devices to your iCloud data. Enable iCloud from the More page again, and confirm that you want to sync with the "Existing Data" alert. If you see the "First Time iCloud Sync" alert, press cancel and try again. Please note: this will replace the local data on your 2nd device with data from iCloud. The two databases will not be merged at this point.

How does iCloud sync work?

With iCloud enabled, all your changes are automatically saved to iCloud and then pushed down to other devices. All your Logs, Todos, Documents, and other data are synced over, merged with existing data, and updated inside your app, without you needing to do anything. You just have to open the app and wait for your changes to stream in.

You can even work without any connectivity, and your changes will be saved locally and uploaded to iCloud at the next possible opportunity. You will need network connectivity to download new data, however.

How long does iCloud take to download changes from other devices?

Depending upon the speed of your network connection and the size of your changes, iCloud can take from a few seconds to a few minutes to push your data to other devices. You can tell when changes are being processed by the small network activity indicator on the top left of the status bar. There is no way to refresh your data manually: you just have to wait for iCloud to push the change to your device. If you are stuck for over 5 minutes, it might help to restart the app. [see the “Useful Shortcuts” section for instructions on how to do this]

How do I turn off iCloud syncing from within the app?

You can stop using iCloud syncing from within Contacts Journal, from the More -> iCloud Settings page. This will move all the iCloud app data from the device and download it to your local device, and further changes will only be made locally. You can always enable iCloud again at any time.

Can I switch iCloud accounts on the device while using the app?

If we notice that you have logged into a different iCloud account on the device, we will again disable iCloud from the app, just as when you turn off iCloud. Please note: if you switch out of an iCloud account (with iCloud enabled in the app), use some other iCloud account, then switch back to the original iCloud account and try to enable iCloud in the app, it can cause your iCloud database to become unusable. You will need to reset your

iCloud store to get iCloud to work again.

What happens if there is a conflict in the data?

iCloud should merge your data and resolve all conflicts automatically for you. That said, you should minimize conflicting changes within a small amount of time, by not editing data on multiple devices within a few minutes of each other.

How do I backup my iCloud data?

You can backup your iCloud data from More -> Manage Data -> choose either “Backup iCloud Data over Email” or “Backup iCloud Data over WiFi”. Please note: backups created from iCloud can have some data missing, from updates which are pending or haven’t been downloaded from iCloud to the device just yet.

Troubleshooting iCloud

What should I do if the app gets stuck at any point?

If the app gets stuck, or is unable to download new data, you can try the following options:

- Restart the app [follow the directions in “Useful Shortcuts”]
- Restart your device, by powering it down and powering back up
- Turn off iCloud sync from the device that seems stuck; then wait 5 minutes and then enable iCloud again
- If that doesn’t work either, follow the steps given below for “**iCloud Reset**”
- Contact us via email if you’re stuck, or if you have any questions

How should I do an iCloud Reset?

An “iCloud Reset” procedure can be helpful if your devices have stopped syncing changes between them due to some iCloud issue. You can follow these steps to get back to a syncing state:

- First, select the device which has the latest data you want to install on all other devices
- From this device, create a backup from More -> Manage Data -> Backup iCloud Data over WiFi, and save that file on your computer.
- Now, turn off iCloud from within CJournal from all devices
- From the first device, in the CJournal app “More” page, press and hold on the “iCloud” row for over 5 seconds, till an alert pops up
- The alert should pop up titled "iCloud Options". If you see the "Enable iCloud" message, you should cancel that and try again
- Once you do see the correct popup, select the "Delete Container" option. This will clean out the iCloud database for Contacts Journal
- now wait 10-15 minutes; then on your Contacts Journal on the first device, with all your data, turn on iCloud. It should give a message saying "First Time iCloud Sync". If it gives an initial message saying "iCloud data already exists", then press Cancel. It means it hasn't updated from iCloud that you deleted the data. Wait a few minutes before trying to enable iCloud again
- After it's done transferring the information to iCloud, wait 10 minutes again, then connect your 2nd device to iCloud and let it connect with the existing iCloud data. If it gives a message saying "First Time iCloud Sync", then press Cancel. It means it hasn't detected the data you just uploaded from iCloud yet. Try again in a minute

How do I restore data from an iCloud Backup

If you would like to restore your data from an iCloud backup, you will need to follow these steps to get to a working state:

- First, turn off iCloud from the CJournal “More” page on all your devices
- In CJournal, go to the More page, and press-and-hold on the iCloud button for 5 seconds till a menu pops up. (if the alert says “Enabled iCloud”, then cancel and try again)
- Select the “**Delete Container**” option, then confirm. Note that this will destroy all your iCloud data linked to Contacts Journal, and there will be no way to recover it unless you have a backup!
- It will take a few minutes for your data to be deleted from your other devices, and you shouldn't try syncing any of your devices to iCloud in the meantime
- On one of the devices, open the app, and go to More -> Manage Data ->

Restore from Backup. Follow the instructions to restore your data using the backup file from your computer

- After waiting a few minutes, launch Contacts Journal, then select More -> iCloud. This will migrate your data onto the iCloud store again as a “First Time Sync”
- After waiting a few minutes again, you can enable iCloud from your other devices and have them syncing again

I tried syncing CJournal to iCloud, but it doesn't connect

First, if you are stuck in the middle of the iCloud sync for a long time, you can force-quit the app. To force-quit the app, press the Home button twice to see the app in the task-switcher. Swipe up on the CJournal screenshot you see to quit the app for good. Then launch the app again from the home screen icon.

Next, try resetting your settings (note: this is not recommended on iOS 8.0.2 specifically): go to the Settings app -> General -> Reset -> Reset All Settings. This will reset all the customized Settings might have, including WiFi passwords, custom ringtones etc, but it won't erase any data from the device. Now try to open the app and connect it to iCloud.

One more option is to logout of your iCloud account from your device's Settings app. Then wait 15-20 minutes before logging back in to CJournal, and then connect to iCloud again.

If there are still problems with this, you should try doing the “**iCloud Reset**” instructions given above.

Upgrading to iOS8 and iCloud Drive

When updating to iOS8, users are presented with the option to upgrade to iCloud Drive, a new Apple feature. Bear in mind that updating to iCloud Drive will cause your iCloud sync to stop working between devices running on iOS7 and those running on iOS8. The only solution would be to upgrade all devices to iOS8.

Also, some users have reported problems while upgrading to iCloud Drive. We strongly encourage you to make backups of your iCloud Data within CJournal before doing the upgrade.

If you do run into issues with iCloud Drive, and your data not being available after you open CJournal again, we suggest the following:

- try keeping your iPhone/iPad plugged into a power source, connected to WiFi AND unlocked for a few hours. Then, try restarting your device after a few hours, and see if the Contacts Journal data comes back.

- if you still don't see the data, you should switch off the iCloud sync setting from CJournal's More page, then wait 5 minutes or so, then enable it again. It should probably work this time.

- another option to try: first switch off iCloud from within CJournal, then logout of your iCloud account from your iPhone/iPad Settings app. Wait an hour or so, then log back in to the same iCloud account; then connect CJournal to iCloud again.

Sync With Dropbox

How do I use Dropbox to sync between the iPhone and iPad versions?

You can use “Save to Dropbox” on one device, and “Fetch from Dropbox” on another device, to keep your data consistent between the iPhone and iPad versions. A file is created on your Dropbox account, in the ContactsJournal folder. You can sign up for Dropbox for free from within the app if you don't have an existing account.

Note that “Fetch From Dropbox” replaces your local CJournal data with the CJournal data that is stored on Dropbox. With Version 3.5, CJournal will detect if you have changes available on Dropbox that you haven't fetched yet, and will warn you if you try to overwrite that data when you Save to Dropbox. With iOS7, it will even check for changes in the background, and notify you if there was new data available on Dropbox.

How can I collaborate with others to manage a shared list of contacts?

You can use Dropbox as described above to collaborate with other co-workers or colleagues. Just create a shared Dropbox account, and ensure they have Contacts Journal installed on their iOS devices, and then Save and Fetch from Dropbox as needed. This will share all the contacts (private or non-private) you have imported or created into Contacts Journal, as well as all contact information (emails, phones, addresses), Logs, To-Dos and Documents you have entered. Be careful not to share personal or confidential information by accident, and make sure to Save and Fetch frequently to avoid data loss.

How do I make sure I don't lose any data when syncing with Dropbox?

When you "Save to Dropbox", it replaces the file that is stored on Dropbox with your device data, and it doesn't merge the information together. To avoid losing data through this, we recommend you follow these steps:

- first, Fetch from Dropbox, to ensure you have the latest changes from Dropbox
- next, make your edits on the device
- then, Save to Dropbox to make sure your changes are saved to Dropbox

With iOS7, you will also get notifications when new data is available on Dropbox, so you can Fetch from Dropbox then. You will also get a warning if there is a risk that your Save to Dropbox will overwrite un-fetched data on the shared Dropbox account.

After Fetch from Dropbox on one of my devices, some of my contacts don't have images and/or don't sync with the Contacts app?

If the contact in Contacts Journal doesn't exist on the device, it won't be able to load the contact image and/or sync information. To keep your iOS contacts list in sync on all devices, you should use an over-the-air service like iCloud, MobileMe, Google Contacts, or MS Exchange.

You can also sync your contacts using iTunes: connect either one of the devices to your computer, go to the device in iTunes, go to the Info tab and see if you have "Sync Address Book Contacts" selected and you are using the same settings for both devices.

Data Backup / Restore

How do I backup my data from the app?

You can backup your data using the "Backup over WiFi" or "Backup over Email" features. To backup over WiFi, you will need another computer connected to the same WiFi network as your iPhone or iPad.

If you have setup a PIN for Contacts Journal, the Backup file is password-protected with the same PIN for your protection.

How do I restore data from a backup?

You can use the "Restore" feature to restore from an earlier backup. You need to have another computer connected to the same Wi-Fi network as your iPhone or iPad. Instructions on how to restore will be printed on the screen. If the backup file is password-protected, you will need to enter the PIN to complete the Restore.

Reporting

How do I export my data into a report?

You can export all the Logs, To-Dos and Contacts information via print, email, CSV or your contacts' notes field. Go to More -> Export to generate a report. You can also select which contacts to include in the report, and give it a date range for your report.

What sort of printer do I need to print my data?

To be able to print directly from the device, you need to have an AirPrint-enabled printer available on the same Wi-Fi network as your iPhone / iPad. For a list of AirPrint-enabled printers, please visit Apple's website.

More

How do I transfer data from the Lite version to the Paid version?

The easiest way to transfer the information between the Lite version and the Paid version of the app is to link to "Dropbox" option (from the More page). Then, you can just use "Save to Dropbox" from the Lite app, and then "Fetch from Dropbox" on the paid version. That should copy the information over.

Can you record the contents of emails / messages, or incoming calls?

When you call, SMS or email someone through the app, it creates a Log for you automatically. This is a great way to keep track of all the phone calls you've made, and take quick notes after the call is done. Unfortunately, due to restrictions of the platform, we cannot record the contents of the email or SMS, or track incoming phone calls or emails.

How do I add password-protection?

You can click on the More -> Pin Settings, and turn on Pin Protection. Please remember the PIN, as there is no way to recover the PIN should it be lost. Your backup files, and the file you share on Dropbox, will also be protected with this PIN.

With iOS8, you can also choose to unlock your CJournal app with TouchID (only for devices that have TouchID enabled)

I want to create Private Contacts, but it still asks for permissions to access my Contacts data

When adding Private Contacts, the CJournal app does not read any data from your Contacts app at all, and only needs to write a temporary contact that is deleted immediately. Apple still requires access to Contacts to be able to do this unfortunately. The work-around for now is to just grant access to Contacts, and know that Private Contacts don't actually access the Contacts app at all.

Can I change existing contacts to Private, and vice versa?

You can convert contacts from the Contacts list; select and hold the contact row for 3 seconds, wait for the context menu to show, and press the Convert button.

I added new contacts in my Contacts app, but they're not available in CJournal

CJournal should detect if you had new contacts and prompt you if you want to import those new contacts into CJournal; it doesn't automatically import those new contacts. If you are not seeing that prompt, you should check a couple of things:

- in CJournal app -> More -> Settings -> Alerts -> make sure "Import New Contacts" is set to On
- in the Settings app -> Privacy -> Contacts -> make sure CJournal is set to On

To import any missing contacts, you can press the + button on the main contacts list, then select "Import from Contacts" ... on the next page, select the missing contacts (or double-tick to select all un-imported contacts), then press + again. That should import those contacts.

How do I re-assign a Log / ToDo / Document to another contact?

To transfer a Log / ToDo / Document to another contact, just hold and press the row for 3 seconds, wait for the context menu to show, and press the Reassign button. This option works great with the Clone option, so, for e.g. you can quickly clone an existing Log and then attach it to another contact

How do I import my contacts list from Excel?

We allow import of vCard files. The best way to convert the Excel file to vCard format might be using Gmail contacts. You can use these instructions to import a list of contacts in Excel into a Gmail account (you could create a new account just for this purpose if you don't want to use your personal Gmail account): <http://support.google.com/mail/bin/answer.py?hl=en&answer=14024&topic=1669027&ctx=topic>

Once you've imported, you can export all the data to a vcard format: <http://support.google.com/mail/bin/answer.py?hl=en&answer=24911&topic=1669027&ctx=topic>

Once you have the vCard file ready, you're set! From the main Contacts list page in CJournal, press the + button and select "Import via vCard" and follow the instructions there

How do I use Contacts Journal on my desktop?

You can access the Mac app from this link: [Contacts Journal CRM for Mac](#)
Bear in mind that the Mac app is a separate purchase and download from the Mac App Store. It requires your Mac to be running Mac OS 10.9 (Mavericks) or 10.10 (Yosemite).

Many of my contacts don't show up on the Map

It takes a while to geo-code (the process of turning your contact's physical address into pins we can display on the map) after a large list of contacts are imported into the app. You should be able to see some progress on the Maps -> List page, in the toolbar at the bottom of this page.

If some pins don't show up for a long time, it might have been due to either a loss of internet connectivity at the time you imported these contacts, or that Apple's Maps service (that helps us do the geo-code) was unavailable for some reason. If you haven't added any custom data for Contacts Journal for these contacts (like Logs, ToDos, Files, etc), then the best thing would be to delete those contacts that are showing in the middle of the ocean, and then re-import them from the Contacts app. It would probably work a 2nd time.

How can I setup my iPad to make calls using my iPhone

With iOS8, you can setup your iPad to make phone calls using your iPhone. You need to setup the following:

- both iPhone and iPad need to be running iOS8
- CJournal app on both iPhone and iPad need to be running version 3.6+

- your iPhone and iPad need to be setup with the same iCloud account
- your iPhone and iPad need to be on the same WiFi network
- in iPad CJournal app -> More -> Settings -> Contact Options -> select "iPhone over WiFi"
- in iPad Settings app -> General -> set "Handoff" switch to On
- in iPad Settings app -> FaceTime -> "FaceTime" should be activated
- in iPad Settings app -> FaceTime -> "iPhone Cellular Calls" should be On

Useful Shortcuts

- If you ever get stuck, try restarting the app. To restart, press the Home button once to exit the app. Then double-tap the Home button again to see your recently-opened apps in the app-switching bar at the bottom. Press and hold the app in the bar, till it shows a minus sign on it (just like when you delete an app). Press the minus button here to close the app, then restart it from the home screen icon.
- You can change the sort order or display order of the contacts list from More -> Display Settings
- To go directly from the Logs or To-Do views to a contact's page (to make a call or send an email), press the name of the contact
- Emails from Contacts Journal are sent using the default account on your device. To change the account used, you can go to the iPhone/iPad Settings app -> Mail, Contacts, Calendars -> scroll down to the Mail section, and select the Default Account; you can change the default account to your preferred outgoing email account. All future emails will be sent from that account
- To "clone" a contact, press and hold on a contact for a couple of seconds from the Contacts list, and it will pop up a small menu. Press the Clone button and it will create a new contact with the same details; you just have to change the name. This is great if you have multiple contacts that belong to the same company
- Press-and-hold works on any Log, To-Do, Contact or Document list. Press and hold for a couple of seconds to see a list of possible quick actions you can perform on that object