

# CONXUSNEO

## CASPIO INSTRUCTIONS

### TO PULL LIST/REPORT

<http://conxusneo.jobs/caspio-login/>

- Click on link “To search our database, click here”
- Login
- To pull report on just 1 sector (i.e. Manufacturing)
  - Go down to list and select No on all but MFG, for MFG select Yes.

Akron Public Schools  Yes  No  Any

Manufacturing  Yes  No  Any

TalentNEO  Yes  No  Any

TechHire  Yes  No  Any


Healthcare  Yes  No  Any

- Select Search
- From here you can scroll through the entire list which will be multiple pages, or you can download that data.

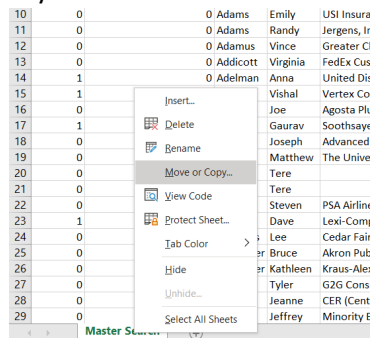
- To download data, select Download Data at the top left of the screen

 [Search Again](#)  [Download Data](#)  [Edit](#)

- Go to your downloaded computer files and you will see the excel document there.

 Master Search

- Open the spreadsheet:
  - It's always a good rule to copy the worksheet to and label as original or save the whole original file for backup.
    - To create a copy: right click on the worksheet tab select *Move or Copy...* Then make a copy named Original. This is helpful in case you make an error you still have the original copy handy.



10	0	0 Adams	Emily	USI Insura
11	0	0 Adams	Randy	Jergens, Ir
12	0	0 Adamus	Vince	Greater Cl
13	0	0 Addicott	Virginia	FedEx Cus
14	1	0 Adelman	Anna	United Di
15	1		Vishal	Vertex Co
16	0		Joe	Agosta Pl
17	1		Gaurav	Soothsay
18	0		Joseph	Advanced
19	0		Matthew	The Unive
20	0		Tere	
21	0		Tere	
22	0		Steven	PSA Airlin
23	1		Dave	Lexi-Com
24	0		Lee	Cedar Fair
25	0		Bruce	Akron Pub
26	0		Kathleen	Kraus-Ale
27	0		Tyler	G2G Cons
28	0		Jeanne	CER (Cent
29	0		Jeffrey	Minority E

- Next on your working tab, you will want to sort by Inactive & CRM-Unable to Receive (1 meaning they are inactive/unable and 0 meaning they are ok.) These indicate that this person is no longer active, and/or we cannot reach them by email. You can delete them from your working spreadsheet so there is less clutter.

## TO SEARCH FOR AND UPDATE CONTACT

<http://conxusneo.jobs/caspio-login/>

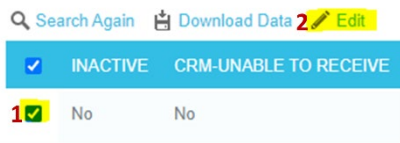
- Click on link “To search our database, click here”
- Login
- You can search by multiple fields so select one:
  - Last Name – you can search partial last name
  - First Name – you can search partial first name
  - Organization – you can search partial organization name
  - Classification (e.g. company, education partner); NOTE: Repeat Search, but enter “Other” so that you capture organizations that have yet to be categorized
  - Talent Network (e.g. Manufacturing Network, TechHire network) – all networks should be on “Any” except the one network you are searching and it should be “Yes”

Last Name	<input type="text"/>
First Name	<input type="text"/>
Organization	<input type="text"/>
Classification	<input type="radio"/> Business Development Organization <input type="radio"/> Community-based Organization <input type="radio"/> Company <input type="radio"/> Consultant <input type="radio"/> Education <input type="radio"/> Funder <input type="radio"/> Government/Public Sector <input type="radio"/> Media
Akron Public Schools	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Any
Manufacturing	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Any
TalentNEO	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Any
TechHire	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Any
Healthcare	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Any

- Click Search
- When the search results are returned to you, you can:
  - Edit individual records by clicking “Edit” on the far right



- This only allows you to edit what you see on the current screen to change additional information
- Click the check box on the left and select Edit at the top left



- When you select Edit there will be a popup screen where you can make additional changes. Be sure to click “UPDATE” after changing the contact information.

NOTE: Carefully review that there is not a “Yes” in the Inactive Column. If there is a Yes, this person is no longer active in our networks and should be excluded from future communication.

## TO ADD A CONTACT

<http://conxusneo.jobs/caspio-login/>

- Click on link “To add contacts to our database”
- Login
- Enter all fields.
  - Organization
  - First Name, Last Name
  - Classification
    - If you do not know Classification, select Other, but note that new contact will not be in your results later if you do a search on Classification because you have not classified them.
- Click Submit