

## 3.1 Contacts: Menu Bar Functions

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**iProjects** has three primary workspaces: **Email**, **Contacts** and **Projects**. The email function is not enabled in v5. See UserGuide Section 2 for **Email** functions and Section 4 for **Projects** functions. You will use the **Contacts** workspace for creating and managing your contacts. The **Contacts** Menu Bar is shown below, in green.



Menu bar functions are **New**, **Delete**, **Find**, **Modify Find**, **Find All**, and **Show List**. All are fairly simple functions except for **New**, which is used to create a new contact and is described in detail following the other function descriptions.

Below the Menu Bar is a set of tabs containing additional contact management functions. These functions are described in UserGuides 3.2 to 3.6.

**New:** See **Creating a New Contact** below.

**Delete:** Click this Menu button to delete the contact you are on. You will be presented with a dialog box asking if you want to delete the contact. If you click 'Yes' it will be gone, and can't be retrieved.

**Find:** **Find** is a very powerful and useful feature that permits you to search by any one of, or with multiple, parameters to locate the contact or group of contacts you are searching for. You will get the page shown partially below:

### Find

<p>Firm or First <input style="width: 90%;" type="text"/></p> <p>Last <input style="width: 90%;" type="text"/></p> <p>Sal <input style="width: 20%;" type="text"/> Initials <input style="width: 20%;" type="text"/> Nick <input style="width: 20%;" type="text"/></p> <p>Position Title <input style="width: 90%;" type="text"/></p> <p><b>Street Address</b></p> <p>Street 1 <input style="width: 90%;" type="text"/></p> <p>Street 2 <input style="width: 90%;" type="text"/></p> <p>City <input style="width: 60%;" type="text"/> State <input style="width: 20%;" type="text"/></p> <p>Code <input style="width: 20%;" type="text"/> Country <input style="width: 30%;" type="text"/></p> <p><b>Mailing Address</b></p> <p>Street 1 <input style="width: 90%;" type="text"/></p> <p>Street 2 <input style="width: 90%;" type="text"/></p> <p>City <input style="width: 60%;" type="text"/> State <input style="width: 20%;" type="text"/></p> <p>Code <input style="width: 20%;" type="text"/> Country <input style="width: 30%;" type="text"/></p> <p>URL <input style="width: 90%;" type="text"/></p> <p>Phone Number <input style="width: 40%;" type="text"/> <input style="width: 40%;" type="text"/></p> <p>Email Address <input style="width: 40%;" type="text"/> <input style="width: 40%;" type="text"/></p>	<p>ID <input style="width: 90%;" type="text"/></p> <p>Contact type <input style="width: 90%;" type="text"/></p> <p>Source <input style="width: 90%;" type="text"/></p> <p>Link <input style="width: 90%;" type="text"/></p> <p>Referred By <input style="width: 90%;" type="text"/></p> <p>Referred Date <input style="width: 90%;" type="text"/></p> <p>Referred By Company <input style="width: 90%;" type="text"/></p> <p>Profession <input style="width: 90%;" type="text"/></p> <p>Birthday <input style="width: 90%;" type="text"/></p> <p>Practise Type <input style="width: 90%;" type="text"/></p> <p>Rel to Our Firm <input style="width: 90%;" type="text"/></p> <p>Size <input style="width: 20%;" type="text"/></p> <p>Duplicate? <input type="radio"/> No <input type="radio"/> Yes <input type="radio"/> OK</p> <p>Sample? <input type="radio"/> Sample</p> <p>Profile <input style="width: 90%;" type="text"/></p> <p>Note <input style="width: 90%;" type="text"/></p>
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You are also presented with a new sub-menu bar shown below.



You are automatically in “New Request”. To search by any field, enter the search name, or select the appropriate dropdown name, in any field; then click “Continue” upper right. This will show you the first matching search found. You can narrow your search by selecting multiple drop-down fields; for example to find a person named Bob Smith who lives in Atlanta.

Then click on “List” in the Menu Bar to see all names the search has returned. In the example above, if there were two Bob Smiths in Atlanta, you’d find both. In this example, I will type “king” into the Last Name field, and hit “Continue”. I get the following return (with my database):

Email		Contacts		Projects		Print		Import	
New	Delete	Find	Modify Find	Find All	Show List				
ID	Type	Sample?	Favourite?	Firm Name	Person Name	Address			
5879	Person	<input type="checkbox"/>	<input type="checkbox"/>	Woodhead Pty Ltd (SA)	David King-Jones	26-28 Chesser Street Adelaide Sa 5000			
10462	Person	<input type="checkbox"/>	<input type="checkbox"/>	Project Marketing Australasia Ltd	Paul King	P O Box 567 Scarborough Wa 6019			
11775	Person	<input type="checkbox"/>	<input type="checkbox"/>		Bruce King-Stem	Gpo 2476v Melbourne Vic 3001			
11847	Person	<input type="checkbox"/>	<input type="checkbox"/>		Mr Andrew Kingdom				
12017	Person	<input type="checkbox"/>	<input type="checkbox"/>	Burlington	Debby King-Rowley	17 Hortense St Glen Iris Vic 3146			
12482	Person	<input type="checkbox"/>	<input type="checkbox"/>	Cardno BSD Consultants Pty Ltd	John King	Bsd Ctr, 2 Bagot Road Subiaco Wa 6008			
13234	Person	<input type="checkbox"/>	<input type="checkbox"/>	Environmental Investigation Services	Adrian Kingswell	Po Box 976 North Ryde Bc Nsw 1670			
13281	Person	<input type="checkbox"/>	<input type="checkbox"/>	Kingston & Associates Pty Ltd	Tony Kingston	Suite 402b, 410 Elizabeth Street Surry Hills Nsw 2010			
13551	Person	<input type="checkbox"/>	<input type="checkbox"/>	SCP Consultants	Bryan King	Level 2, 507 Kent Street Sydney Nsw 1001			
14255	Person	<input type="checkbox"/>	<input type="checkbox"/>	Design King Co Pty Ltd	Jon King	102/21 Alberta Street Sydney Nsw 1001			
14522	Person	<input type="checkbox"/>	<input type="checkbox"/>	Mirvac Design (NSW)	Adrian King	Level 26, 60 Margaret Street Sydney Nsw 1001			
19042	Person	<input type="checkbox"/>	<input type="checkbox"/>	SKM - S2F (VIC)	Andrew Kings	Po Box 312 Flinders Lane Melbourne Vic 3000			
19661	Person	<input type="checkbox"/>	<input type="checkbox"/>	Archimedia Ltd - Hamilton	Stephen King	Po Box 4166 Hamilton East (nth Island)			
21592	Person	<input type="checkbox"/>	<input type="checkbox"/>	Sinclair Knight Merz Limited - Auckland	Duncan Kingsbury	Po Box 9806 Auckland (nth Island)			
22112	Person	<input type="checkbox"/>	<input type="checkbox"/>	Elsevier Australia	Mr Guy Kingston-Bray	Tower 1, 475 Victoria Ave Chatswood Nsw 2057			
22387	Person	<input type="checkbox"/>	<input type="checkbox"/>	Harley Ellis Devereaux	Mr Dennis King	26913 Northwestern Highway, Suite 200 Southfield MI			
25002	Person	<input type="checkbox"/>	<input type="checkbox"/>	Wood & Grieve Engineers (WA)	Stephen King	Level 3, 3 Plain Street East Perth Wa 6004			

Here we are back at the main Contacts List View, indicating that we’ve found 15 people with the last name “King”. If they had home addresses listed in their records, they would also show in the “Address” field. Note that you can sort any found set by any of the underlined blue title categories, making it easy to zero in on the person (or firm) that you want. In this example, if there had also been a Firm with the name “King” in it, it would have found that as well – but ONLY if you had entered “king” in the first field, “Firm or first”.

Also note here that there is a new tab in the Menu Bar, “Import”. This is used to import contact records from your current contact system, and is discussed under UserGuide 6.5: **Importing Existing Contact Records.**

**Modify Find:** Click this button to return to the Find layout shown on page 1. Your earlier find criteria will still be shown.

**Find All:** Click this button to find all contacts.

**Show List:** Click this button to show a list of all found contacts.

**Navigation Arrows:** At the far right of the menu bar are arrows for moving between a found set of contacts. << = “go to first contact”; < = “go to previous contact”; > = “go to next contact”; and >> = go to last contact. The grey font counter above these buttons tells you the number of contact records and which contact record you are on.

Record 1 of 169: Total 169



### Creating a New Contact:

When you click on the **New** button, you are first asked if you want to create a *Person* or *Firm* record. If you are going to add a new firm, and one or more persons for that firm, it is best to create the *Firm* record first.

If you select Firm, you will be shown a blank template for a *Firm*:

The screenshot displays the 'Details' tab of the iProjects software. At the top, there are tabs for 'Email', 'Contacts' (which is active), and 'Projects'. Below these are buttons for 'New', 'Delete', 'Find', 'Modify Find', 'Find All', and 'Show List'. The main form area is titled 'Details' and contains several sections:

- Firm Information:** Fields for Firm Name, Firm type, Practice Type, Relationship to Our Firm, Contact type (set to 'Firm'), Business/Tax code (set to 'ABN'), Size, Source, ID (set to '25523'), and Link.
- Addresses:** Fields for Street Address, Mailing Address, Street 1, Street 2, City, State, Code, and Country.
- Phone Numbers:** A table with columns for 'Creation/Mod. Info', 'Phone', and 'Email'.
- Email Addresses:** A table with columns for 'Creation/Mod. Info', 'Email', and 'Phone'.
- Other Addresses:** Fields for Street 1, Street 2, City, State, Code, and Country.
- Disciplines:** A list of checkboxes for various professional disciplines such as General, Facilities Mgt, Interior Design, etc.
- Market Sectors:** A list of checkboxes for market sectors such as Aged Care, Commercial, Educational, etc.

At the bottom of the form, there are checkboxes for 'Sample?' and 'Duplicate?' (with 'No' selected), and 'Yes' and 'OK' buttons.

Simply fill in all the information you have for the firm. You can link people to that firm once you have created new records for them. Before creating a new Firm record, we suggest that you review UserGuide 3.2: **Contacts: Details** through 3.6: **Contacts: Map, Notes & To Do List**.

If you select Person, you will be shown a blank template for a *Person*:

The screenshot shows the iProjects software interface for creating a new Person record. The interface is divided into several sections:

- Navigation:** Email, Contacts (selected), Projects. Below these are buttons: New, Delete, Find, Modify Find, Find All, Show List.
- Tabbed Interface:** Details (selected), Map, Projects, Email, CV & Training, Notes, To Do.
- Form Fields:**
  - Personal Information:** First Name, Middle, Last, Initials, Nick, Position Title, Firm, Street 1, Street 2, City, State, Code, Country, URL.
  - Special Skills:** Healthcare, Aged care, Retail, Educational, Airports.
  - Approved For...:** Make Calculations, Check Calculations.
  - Profile Lists:** A list of profile lists with an 'Assign Profile' button.
  - Contact Information:** ID (25524), Contact type (Person), Source, Link, Referred By, Referred Date, Referred By Company, Profession, Birthday.
- Phone Numbers:** A table with columns for Phone Numbers, Creation/Mod. Info, and a 'New' button.
- Email Addresses:** A table with columns for Email Addresses, 1st Email used when sending from email tab, Creation/Mod. Info, and a 'New' button.
- Other Addresses:** A table with columns for Other Addresses, Creation/Mod. Info, and a 'New' button.

At the bottom, there are checkboxes for 'Sample?' and 'Duplicate?' (with radio buttons for 'No' and 'Yes'), and a 'View Dupes' link.

Before creating a new Person record, we suggest that you review UserGuide 3.2: **Contacts: Details** through 3.6: **Contacts: Map, Notes & To Do List**.