

My Contacts

Version V3.10.30: 7 March 2012

The *My Contacts* tool

The **My Contacts** tool is located on the **Home** page. The **My Contacts** box provides a “quick view” display and a customized list of your frequently used contacts. At a glance you have access to basic business details – contact numbers and address.

My Contacts

To add a Contact to **My Contacts**, click the star after the surname on the Contacts record.
To add a Project to **My Projects**, click the star after the name on the Projects record.

Firm or Person Name	Business #	Mobile #	Address
▶ Sanders Turner Ellick Architects Pty Ltd	07 4957 7341		PO Box 758 MACKAY QLD 4740
▶ Fantasy Projects			1 Queens Road Melbourne VIC 3004
▶ Bill Matheson, Sanders Turner Ellick Architects Pty Ltd			PO Box 758 MACKAY QLD 4740
▶ Steven Turner, Sanders Turner Ellick Architects Pty			PO Box 758 MACKAY QLD 4740

How to add contacts to the list

CLICK on the “**Contacts**” tab, and then select the **Details** tab, if not already open.

CLICK on the White ☆ next to the field “**Contact Name**” to add a contact to **My Contacts** on your work area – this turns the star to yellow, indicating it is now selected as one of your contacts.

10337 - Christou Design Group

Contacts | New | Delete | Find | Modify Find | Find All | Show List

Details | Map | Projects | Email | Staff

Firm Name: **Christou Design Group** ☆ | Contact type: **Firm** | Business/Tax code: [] []

Firm type: [] | Relationship to Our Firm: [] | Size: **22** | Source: **PSMJ**

Practice Type: **Architecture** | [] | ID: **10337** | Link: []

Street Address: **12 Gugerri Street** | [Copy To Mailing](#) | [Map This](#) | Mailing Address: [] | [Copy To Street](#) | [Map This](#)

Street 1: [] | Street 2: [] | City: **CLAREMONT** | State: **WA**

Code: **6010** | Country: **Australia** | URL: **www.jcpa.com.au**

☆ A yellow star indicates that the contact is selected to appear in **My Contacts**. You can “select” and “deselect” **Contacts** from this location.

Details | **Map** | **Projects**

Firm Name:

Contact type:

Firm type: Relationship to Our Firm:

Practice Type:

Size:

ID:

The selected contact now appears on your **My Contacts** screen on the home page.

To facilitate adding a number of contacts from the same firm, for example when setting up a new project, you can go to the firm's Contact record, select the **Staff** tab, and turn on (or off) any of the people listed, as shown in the screen shot below, just by clicking the stars in the left column.

Email | **Contacts** | **Projects**

New | Delete | Find | Modify Find | Find All | Show List

Details | **Map** | **Projects** | **Email** | **Staff** | **Notes**

Position Title	Name	Address
<input checked="" type="checkbox"/> Managing Director	▶ Anthony Flannery	PO Box 109169 NEWMARKET AUCKLAND (Nth Island) 1149
<input type="checkbox"/> Director	▶ Maurice Kiely	PO Box 109169 NEWMARKET AUCKLAND (Nth Island) 1149
<input checked="" type="checkbox"/> Director	▶ Darryl Carey	PO Box 109169 NEWMARKET AUCKLAND (Nth Island) 1149
<input checked="" type="checkbox"/> Director	▶ Simon Woodall	PO Box 109169 NEWMARKET AUCKLAND (Nth Island) 1149
<input type="checkbox"/> Landscape Architect	▶ Leigh Wilson	PO Box 109169 NEWMARKET AUCKLAND (Nth Island) 1149
<input type="checkbox"/> Team Leader	▶ Marcel Veth	PO Box 109169 NEWMARKET AUCKLAND (Nth Island) 1149

If you have selected more people for **My Contacts** than the length of the Home Page window, the red scroll bar on the right side of the window is activated (indicated by showing as a hatched bar), allowing you to scroll up and down to find the person you are looking for.

Email | **Contacts** | **Projects**

Office Admin | System Admin

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▶ Sanders Turner Ellick Architects Pty Ltd	07 4957 7341		PO Box 758 MACKAY QLD 4740
▶ Christou Design Group	08 9285 6888		12 Gugerl Street CLAREMONT WA
▶ Fantasy Projects			1 Queens Road Melbourne VIC 3004
▶ Anthony Flannery, Chow:Hill Architects - Auckland			PO Box 109169 NEWMARKET
▶ Bill Matheson, Sanders Turner Ellick Architects Pty Ltd			PO Box 758 MACKAY QLD 4740
▶ Darryl Carey, Chow:Hill Architects - Auckland			PO Box 109169 NEWMARKET
▶ Simon Woodall, Chow:Hill Architects - Auckland			PO Box 109169 NEWMARKET

To **remove a contact** from your **My Contacts** list, click on the red triangle to go to the details screen and remove this contact by clicking on the yellow star. The star will change colour to white, indicating that the contact has been deselected.