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.

Email Contacts Projects Office Admin System Admin Image: System Admin Image: System Admin Contacts To add a Contact to My Contacts, click the star after the surname on the Contact To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project To add a Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Projects, click the star after the name on the Project to My Project to My Projects, click the star after the name on the Project to	← → ?]	Projects		
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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.

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En	nail	Contacts	Projec	ts	
New	Delete	Find	Modify Find	Find All Sho	ow List
Deta	ails	Мар	Projects	Email	Staff
Firm Name	Christou Design G	roup	Contact type Firm	m Business/Tax code	
Firm type		Relationship to Our F	irm Size 22	Source PS	MJ
Practice Type	Architecture		ID 103	37 Link	
	Street Address	Copy To Mailing Map	This Maili	ing Address Copy To St	reet Map This
Street 1	12 Gugeri Street		Street 1		
Street 2			Street 2		
City	CLAREMONT	State WA	City		State
Code	6010 Cou	ntry Australia	Code	Country	
			URL 🕨 ww	w.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			Мар	Projects			
Firm Name	Christou D	esign Grou	hb	숥	Contact type Firm		
Firm type			Relationship to O	ur Firm	Size 22		
Practice Type	Architecture				ID 10337		

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.

E	Email		Co	ntacts	Projec	ts				
New		Delete		Find	Modify Find	Find A	AII -	Show List		
De	etails		Мар	Ŷ	Projects		Email		Staff	Notes
P	Position Title				Name		Address			
- 🚖 - N	Managing Direct	tor		•	Anthony Flannery		PO Box	109169 NEWMA	RKET AUCKLAN	D (Nth Island) 1149
☆ C	Director			•	Maurice Kiely		PO Box	109169 NEWMA	RKET AUCKLAN	D (Nth Island) 1149
🚖 C	Director			•	Darryl Carey		PO Box	109169 NEWMA	RKET AUCKLAN	D (Nth Island) 1149
🚖 C	Director			•	Simon Woodall		PO Box	109169 NEWMA	RKET AUCKLAN	D (Nth Island) 1149
☆ L	andscape Arch	itect		•	Leigh Wilson		PO Box	109169 NEWMA	RKET AUCKLAN	D (Nth Island) 1149
☆ T	Feam Leader			•	Marcel Veth		PO Box	109169 NEWMA	RKET AUCKLAN	D (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	3	
Office Admin	System Admin			
My Contacts	To add a Contact to To add a Proje	My Contacts, click ct to My Projects, c	the star after the surname on the Contacts record. lick the star after the name on the Projects record.	
Firm or Person Nam	le	Business #	Mobile #	Address
Sanders Turner Ellick A	Sanders Turner Ellick Architects Pty Ltd			PO Box 758 MACKAY QLD 4740
Christou Design Group		08 9285 6888		12 Gugeri Street CLAREMONT WA
Fantasy Projects	Fantasy Projects			1 Queens Road Melbourne VIC 3004
Anthony Flannery, Cho			PO Box 109169 NEWMARKET	
Bill Matheson, Sanders	Ltd		PO Box 758 MACKAY QLD 4740	
Darryl Carey, Chow:Hil			PO Box 109169 NEWMARKET	
Simon Woodall, Chow:			PO Box 109169 NEWMARKET	

To **remove a contact** from you're *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.