3.1 Contacts: Menu Bar Functions
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iProjects has three primary workspaces: **Email, Contacts** and **Projects**. 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.
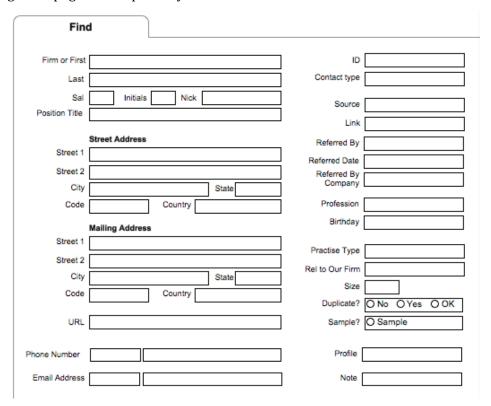
Email	Contacts	Projects
New	Delete	Find	Modify Find	Find All	Show List

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:
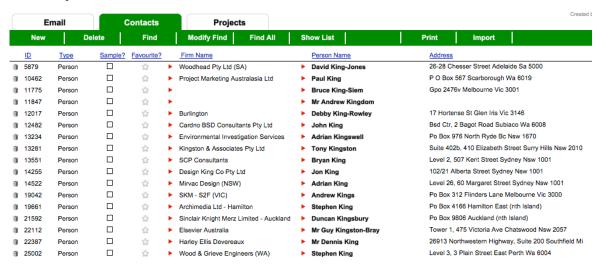
Find

Firm or First	ID
Last	Contact type
Sal Initials Nick	Source
Position Title	Link
Street Address	Referred By
Street 1	Referred Date
Street 2	Referred By Company
City State	
Code Country	Profession
Mailing Address	Birthday
Street 1	Practise Type
Street 2	Rel to Our Firm
City State	Size
Code Country	Duplicate? ○ No ○ Yes ○ OK
URL	Sample? ○ Sample
Phone Number	Profile
Email Address	Note

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):

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.
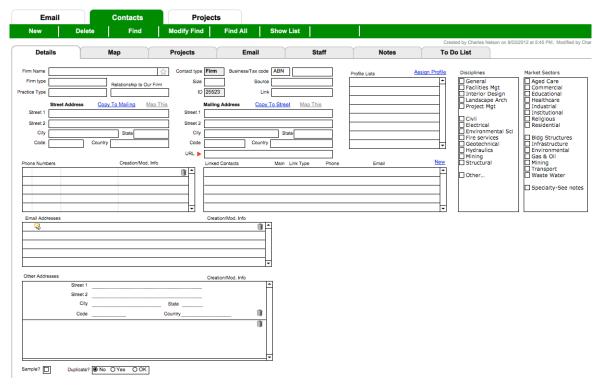
Record 1 of 169: Total 169

<< < > >>

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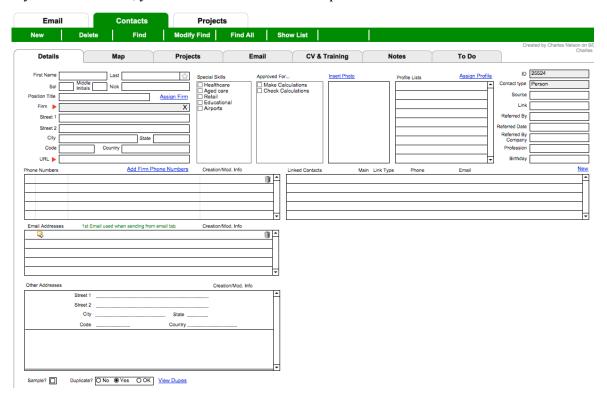
If you select Firm, you will be shown a blank template for a *Firm*:

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*:

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.**