3.2 Contacts: Details

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Overview

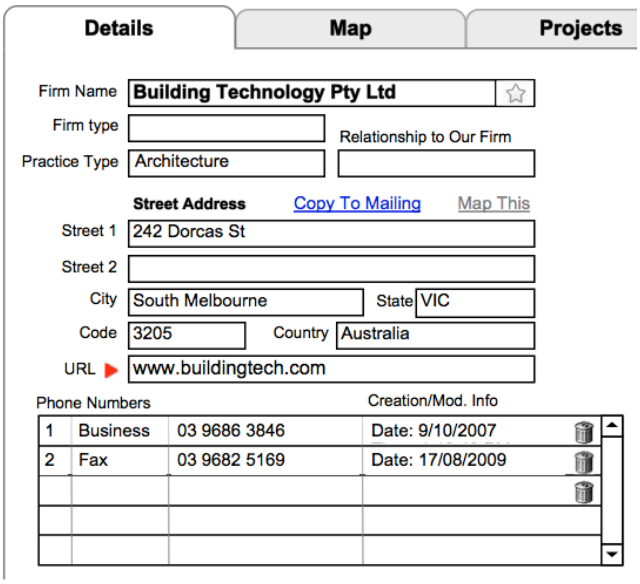
This UserGuide describes the main functions of **iProjects** Contacts. Contacts are divided into two linked data structures, Firms and Persons. The **iProjects** Contact tools provide an extremely flexible, comprehensive way to keep track of all of the details of the people and firms you work with, and to find the people you need very quickly regardless of the size of your database.

The database uses a feature called "Value lists" to tag contacts with an unlimited array of design-specific as well as general information about your contacts. All value lists are fully and easily user-definable; however some require Admin-level permissions to maintain the consistency and reliability of your firm's records structure. These are noted as appropriate.

iProjects comes with some sample contacts, for purposes of demonstrating how ***Contacts*** works, and to illustrate how contacts are accessed in project records. These sample contacts can easily be deleted as a batch once you no longer need them. We'll show you how to do this below under **Deleting Sample Contacts**.

When you open **iProjects** and select ***Contacts*** in the main menu bar, it will open to the last record accessed, whether it be a person or firm.

Firm data structure

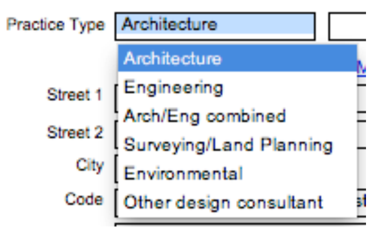


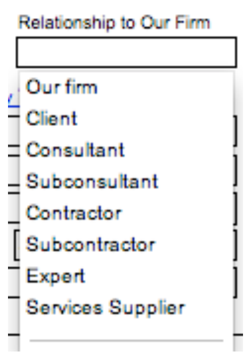
Let's first look at the upper left side of the Firm page. Most of the fields are obvious and their use intuitive, but a few features require explanation.

Firm type, Practice type and *Relationship to our firm* are all dropdown menus, from which you can select information about each of these parameters, as shown below.

Clicking on any of these enters the selected parameter in the field.

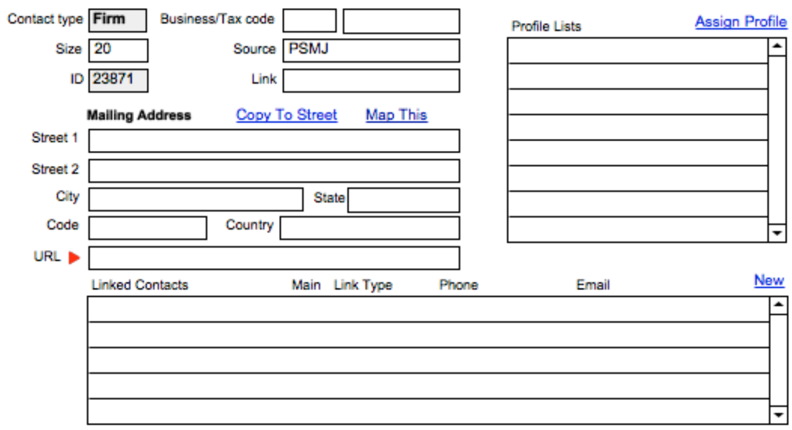
All of these fields can be easily modified as desired – refer UserGuide 5.5 Managing Value Lists.





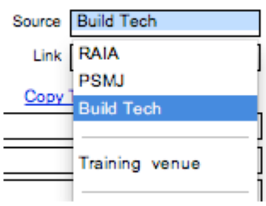
You should be able to search the database for firms that fit any combination of these parameters. At the date of this writing, however, you can only search on ***Practice Type***. The others will be added to the ***Find*** function in the next update.

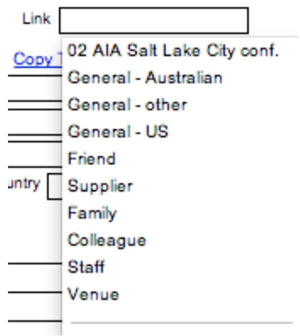
The purpose of the Copy to Mailing and Map this buttons deal with the fact that some firms prefer a post box address while others prefer a street address. However, Google Maps (see UserGuide 3.6: Map, Notes & To Do List)) can't find the physical location of the firm without a street address. Therefore we have included the facility to provide for two address types, to map either one, and (to eliminate typing errors) to enter one and copy it to the other. You can use one or the other or both, as long as you map a street address if you want to know where the firm is located.



Continuing across the Contact > Firm page, we see the fields at right.

Contact Type tells you whether you are on the *Firm* or *Person* page. This could be useful if you have an individual as a client, who does not have a "firm". You might want to list the person under Firm to access the fields used for *Firm* contacts.





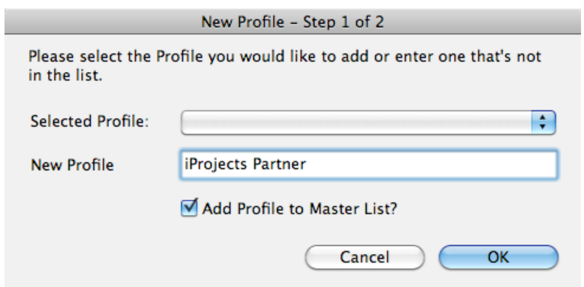
The Business/Tax Code field is to record the contact's company registration. For example, in Australia you would use ACN or ABN (Australian Company Number or Australian Business Number); in the US you might use EIN (Employer ID Number); in NZ you might use IRD (Inland Revenue Department). You can change these acronyms in **Office Admin > Value Lists**.

ID is simply a unique auto-assigned number that the software uses to keep track of all the other information.

Source is a field to tell you where the contact originated. For example, if you were a member of a Lions Club, you might use that as a *Source* tag. *Link* is a similar way of identifying or labeling your Lions Club connection to a contact. You can assign only one *Source* and one *Link*. If you have administrator access, you can add and delete any of these field items – see UserGuide 5.5 Managing Value Lists. That restriction is to keep the lists under some semblance of control.

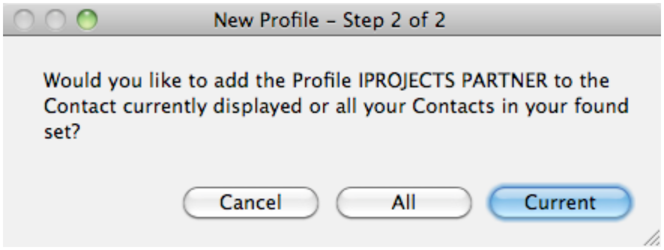
Creating Firm Profiles

If we move now to *Profile Lists*, we see another very powerful tool that helps to keep contacts sorted out. Whereas *Source* and *Link* fields are firm-wide and can only be modified by someone with Administrator-level, Profile Lists can be edited by anyone, and tags in the list can be applied to a found set of contacts or to a single contact.



In the example above, I have clicked on the Assign Profile button, which opens the window shown. I've typed "iProjects Partner" into the New Profile field. I've also ticked the Add Profile to Master List box. This means that it will be available to everyone else in the firm in the future.

Then click the OK button, which opens the second dialog box (see right).



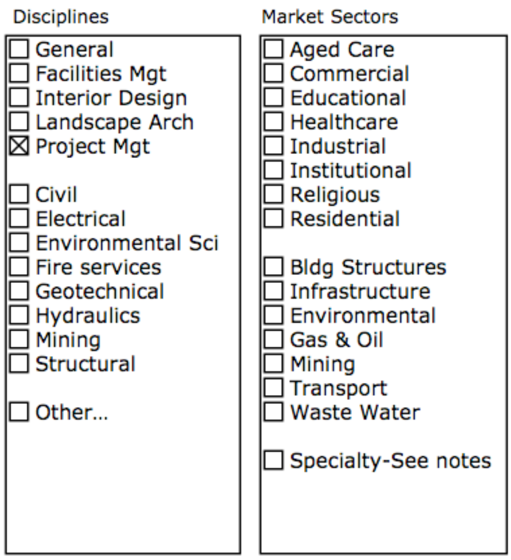
Here, you select whether you want to assign this Profile to only the displayed contact, or to all of the contacts in the found set.

For example, you might put together a list of all firms to receive your newsletter – then next time all you would have to do is sort the database on "Newsletter" and you'd have all those that received it last time – without having to maintain any separate records.

You might be thinking that there is way "too much information" here – but we've been using these Contact templates to run our business for more than 15 years, and we find all of these useful. The hard part is remembering to tag the Contact when we enter it in the system. With more than 3,000 firms and more than 7,000 people in our own contact system, it is easy to forget how it is that we know about somebody, and what we know about them.

If your firm does targeted marketing to past (or even future) clients, you will find these Value Lists an easy way to sort your contacts on multiple criteria. If you don't need these fields, of course, you don't have to use them!

Disciplines & Market Sectors



We now come to another powerful tool in helping you to locate the design disciplines and market sectors you need. If you develop the habit of ticking these boxes when you enter a new contact or update a contact record, you will be able to locate all the firms in your database that fit a certain profile, in a second.

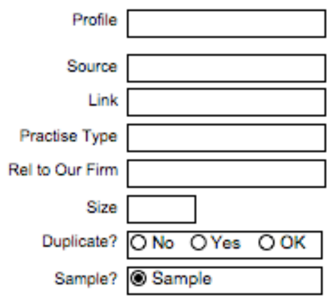
To add a Discipline, simply click the matching box. You can click as many fields as you want, and search on any of them.

If one of the firm's disciplines isn't listed, click the "Other" button and enter the specialty.

The Market Sectors fields operate the same way. If the firm has a specialty that isn't listed, you are asked to turn on the button and describe the Market Sector in Notes.

Both of these listed are managed in Value Lists

Deleting Sample Contacts



To delete sample contacts, go to ***Contacts > Find***, and click the Sample? radio button, then click Continue in the green menu bar (right side). You have now selected all Sample contacts. If you now select Delete in the menu bar, you will delete all Sample contacts.

If you change your mind and don't want to do that, click Modify Find button, which displays the find, and click the Delete Request button. This unchecks the selection. Now click back to the Home icon, and from there you can go back to your usual Contacts layout.

Related UserGuides: For help with:

Displaying your key contacts on the Home page, see UserGuide 1.2: My Contacts.

Creating new contacts: See UserGuide 3.1: Contacts: Menu Bar Functions.

Assigning persons and firms to projects: See UseGuide 3.3: Projects.

For linking contacts and email: See UserGuide 3.4: Contacts: Email

Connecting persons to firms: See UserGuide 3.5 Contacts: Staff.

Using the Map, Notes and ToDo functions: See UserGuide 3.6: Map, Notes & ToDo List.

Modifying value lists requiring Admin-level permissions: See UserGuide 5.1 Value Lists.