Office Admin: Managing Profiles

What Are Profiles?

Profiles allow you to create user groups for sending target mails or searching for contacts under the same group. These profiles will appear in the Profile Lists in the Contacts Window.

The examples below (and that you'll see in your version, as examples) are from our internal system; we use this feature in our direct mail and email communications.

Email	Contacts	Projects
Office Admin	System Admin	

Value Lists	TeamWork	Profiles	
Profile	**Description**		**New**
ACT Arch No 1 mail			🗑
ACT Eng No 1 mail			🗑
BT Contact			🗑
email no 1 excl WA			🗑
Firm email no 1 no WA			🗑
Firm email Nov2011			🗑
iPhone Sync			🗑
iProjects partner invitation			🗑
Previous Attendee mailout Aug11			🗑
PSMJ Contact			🗑
PSMJ Survey enquiry			🗑
QLD Arch Mailout Aug11			🗑
QLD Eng Mailout Aug11			🗑
Request i-Projects newsletter			🗑
TAS ARch No 1 mail			🗑
TAS Eng No 1 mail			🗑
Vic Eng mail Aug11			🗑

Creating a new Profile entry

Click New to create a profile (e.g. Government) and type the description (e.g. government officials). Use of the Description field is optional, but using it helps to remember the purpose of the entry.

Profile	Description	New
BT Contact	Contact comes from Buildong Technology records	🗑
iPhone Sync	Used for updating iPhone contacts	🗑
James test	(Test)	🗑
New test profile	(Test)	🗑
PSMJ Contact	Contact comes from PSMJ Resources contact list	🗑

Delete unwanted profile entries (such as the examples we use) by clicking on the trashcan at the right of the line.

Using Profiles

Profile Lists (in **Contacts**) allow you to assign one or more Contacts to one or more lists. This enables you to tag/label a contact with many different identifiers, for example, "Christmas mailing list" or "important client list", "Contractors to be wary of " etc. You can assign as many Profile tags to a contact as you wish. You can then find contacts based on the list(s) they are assigned to. See UserGuide **3.2 Contacts: Details** for a further discussion.

Deleting a Profile

A profile cannot be deleted from individual Contact records by deleting it from the Profiles list in the **Office Admin > Profiles** tab.

In order to **delete a Profile from an individual Contact record**, go to that contact record, clicking the trashcan at the right of the profile list.
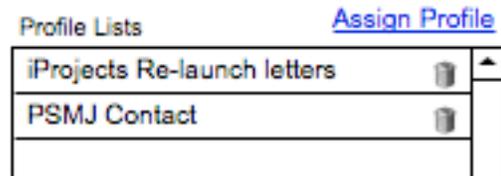
This will open a dialog box, shown right. To delete the Profile, click the Current button.

To **delete a Profile from all Contact records**, first do a Find on the Contacts that are assigned to that Profile. You do this by going to *Contacts*, clicking on Find in the green header, selecting the Profile you want to delete in the Profile field, then clicking on Continue at the right side of the green menu bar.
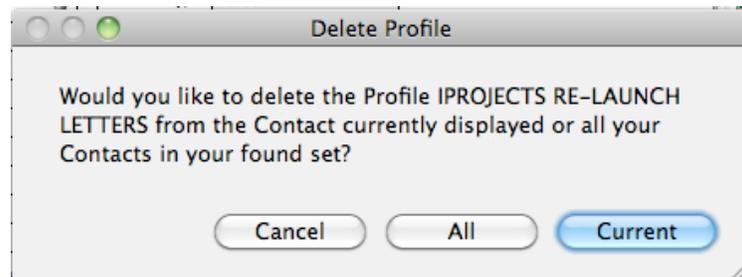
This will find ALL Contacts that have been assigned this Profile. Then open the record of any one of those Contacts by clicking the red triangle next to that Contact's name (not the Firm name). Now click the trashcan in the Profile field opposite the Profile you want to delete.

The same dialog box will open, as shown above. In this case, click the All button. The Profile will be deleted from every Contact to which it has been assigned. NOTE: You cannot undo this operation – they will be GONE.

Once you have deleted the Profile from all Contact records, go the **Profile** tab under **Office Admin**, and click the trashcan at the right of the line opposite the Profile to delete. That will remove it from the selection list throughout the Contact records.