

AIM Contacts Quick Reference - Mac OS

Opening the Contacts Module

To open the Contacts module select Contacts from the AIM menu, press the **Command-#** associated with Contacts, or click on the Contacts button in the Home window.

Troubleshooting Tips

On rare occasions (usually when previewing) AIM may appear to be stuck. When this happens press the **Enter** key 2 or 3 times.

On occasion some calculated fields may not update while editing. To save your changes and update the screen press **Command-S**.

When the Report Preview and other modal windows are front-most the window widgets (close, minimize, zoom) will not function. Click on a Continue, Cancel or OK button within the front-most window or press **Command-W**.

If you get an error message when trying to edit a field stating that "Your access privileges do not allow you to perform this action" it may be because the Contact is locked. Unlock the Contact and try again. If you still cannot edit the Contact your group may not have edit privileges. Contact your database administrator.

Productivity Tips

Unless you need to edit a Contact most operations in the Contacts module can be performed from the Contact Summary tab.

To change the magnification of the window while editing or previewing use **Command-= (plus)** or **Command-- (minus)**.

When editing a Contact use **Command-[** and **Command-]** to move quickly between tabs without moving your hands from the keyboard.

Control-Click on any editable field or the background of a Contact to get a contextual menu of editing, formatting, sorting or finding options.

Mark Contacts you refer to frequently as your favorites. See Finding Favorite Contacts.

Find Contacts you have recently viewed quickly. See Finding Recent Contacts.

Mark Contacts you may need to gather together. See Finding Marked Contacts.

Contacts Tips & Tricks

Finding Contacts

The fastest way to find Contacts is to press **Command-F**, type one *or more* text strings (separated by spaces) that match the beginning of words within a Contact and press **Return**. You do not need to type whole words. You do not need to press the Find button with the mouse.

If only one Contact is found the Contact will be shown in Form view. If more than one Contact is found the Contacts will be shown in list view sorted in alphabetical order by the List As field.

To find Contacts that match a specific editable field, select all the text in the field or select no text in the field, **Control-Click** in the field and choose Find Matching Records from the contextual menu.

To find Contacts that match a particular text string in a specific editable field, select the text string, **Control-Click** in the field and choose Find Matching Records from the contextual menu.

See commands in the Find menu for more options.

Finding Favorite Contacts

You can find Contacts that you need to refer to frequently by selecting Find My Favorite Contacts from the Find menu. Favorites are list in reverse order, the most recent added at the top of the list.



To add a Contact to your favorites list check the Favorite (heart) checkbox on most layouts. To move a Contact to the top of the list uncheck and recheck the Favorite checkbox. Favorites are saved separately for each user.

Finding Recent Contacts

Find the last 100 Contact you have created or recently viewed with the Find My Recent Contacts command in the Find menu. The Contacts will be listed in reverse chronological order with most recent at the top. Recent Contacts are saved separately for each user.



Finding Marked Contacts

Mark Contacts that you need to gather temporarily using the Mark checkbox on most layouts. Find Contacts that you have marked by selecting Find My Marked Contacts from the Find menu. Marked Contacts are listed in the order they were marked.

Clear your marks when finished using the commands in the Contact menu. Marked Contacts are saved separately for each user.

Navigating to Linked Contacts

Contacts are automatically linked by Company name provided the company names match exactly. To go to a company contact click on the name of the contact in the lower right corner of the Contact Summary tab in Form view.

Any number of Contacts can be linked together. The criteria used to link contacts can be anything that relates the the Contacts together. To go to a related Contact click on the name of the contact in then the upper right corner of the Contact Summary tab in Form view. See Linking Contacts.

Creating New Contacts

To create a new Contact from a template select New Document from the Document menu, press **Command-N** or click on the New button in the task bar. You will be prompted to consider whether the Contact you want to create already exists. You should always check to make sure the Contact does not already exist before creating a new one. Duplicate Contacts should be avoided if at all possible.

Duplicating Existing Contacts

Duplicating Contacts is generally not recommended except in the case where a new Contact will share the same company information as an existing Contact. To duplicate an existing Contact find the Contact first and then use the Duplicate Contact menu command or Dup button. All other fields will remain unchanged. Take care to review all the data in the new Contact for accuracy.

Unlocking Contacts



It may be necessary to unlock Contacts before editing. To unlock a Contact un-check the Lock field in any view. Unlocking the Contact temporarily will unlock the Contact only for you and only while the Contacts module remains open.

Deleting Contacts

To delete the current Contact choose Delete Contact from the Document menu or click on the Delete button. You must unlock a Contact before deleting it.

Editing Contacts

To edit an existing Contact find the Contact first. Refer to the commands in the Edit menu. If you get an error message that your privileges do allow editing your group may not have edit privileges or the Contact may be locked. Unlock the Contact and try again.

Addressing a Document



If you have access to the AIM Documents module you can create a new document addressed to the current Contact by clicking on the Document button next to the address on the Contact Summary tab or by selecting Create Document... from the Contact menu.

Addressing an Envelope or Label



To address an envelope or label to the current contact, click on the Envelope or Label button next to the address on the Contact Summary tab or by selecting Print Envelope... or Print Label... from the Contact menu. See Printing Reports.

Addressing an E-Mail



To address an e-mail to any e-mail address click on the Document button next to the e-mail address on the Contact Summary tab or by selecting Email Current Contact... from the Contact menu.

Getting a Map



To get a map showing an address for the current Contact click on the Document button next to the address on the Contact Summary tab or by selecting Get Map from the Contact menu.

Enlarging a Phone or FAX Number



To aid in dialing a phone or FAX number you can enlarge the number by clicking on the Phone button next to the desired number. Click anywhere in the AIM Dialog window to cancel.

Opening a Web Page or URL



To open the web page or URL for a contact click on the Globe icon next to the desired URL. Web pages will open in your web browser.

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Switching Addresses

On Contacts with more than one address you switch the addresses using the Switch Addresses... command in the Edit menu.

Saving Contacts

Contacts are saved automatically. Changes to Contacts are saved whenever you exit all fields. You can save a Contact manually and update any displayed information by pressing **Command-S**.

Sorting Contacts

Sort Contacts while in List view by clicking on any column heading in black text or the Locked, Favorite, or Marked heading to sort by that column.

In Form or List view Control-Click on any editable field and select Sort Ascending or Sort Descending from the contextual menu.

Previewing & Printing Reports

To preview a document type **Command-P** or click the Print button. To print press **Command-P** again. To save a PDF file while previewing press **Command-S**. To create a PDF file and attach it to an e-mail while previewing press **Command-E**. To cancel the preview click on the Continue button or press **Enter** or **Command-W**.

Tip: You can drag the Document Preview window around by clicking and dragging the window title bar. If the window becomes hidden behind other windows click on any button or the background of the Preview window.