Fast-Class File

Client Data System

Volume 85: Adding a Contact Picture

Before adding a contact picture to a contact record in CDS, an image:

- must be saved in jpeg format with the .jpg extension
- should be saved in portrait orientation
- should be as close to 120 x 175 pixels



J_ackerman.jpg Figure 1: Image of Joseph Ackerman saved as a jpeg (.jpg) file.

Adding a Picture to a Contact Record

You can add a picture to a contact record by embedding the image in the CDS database or by using a link to an image stored in a different location.

Important Note: In order for linked images or documents to be available for all users of network installation of CDS, the image or document will need to be located in a shared location. Also, every user's system will need to have access to the shared location and each system will need to be mapped to the location in the same way or the image or documents will not be accessible. Also, if a user launches Mobile Merge mode, then he or she will not be able to view linked documents or images. Finally, if the image is moved or the name of the image is changed, the link will be broken and the image or document will not be available.

Adding a Contact Picture with a Left-click (Embedding an Image):

- Open the contact record the picture will be added to.
- Click the Additional Personal tab.
- Left-click on the **Picture** icon in the **Misc. Personal Information** section.



👙 Contact - Dr. Joseph M. Ackerman, M.D. (50)							
Summary	Personal	T A	dd'l. Personal	Key R	elations	Benefits	
Misc. Personal In Drivers Lic.# Lic.State	G5418888		0	Set M	embership -	Varne	Create
Maiden Name Last Dr.Appt	11				EVERYONE		07/06/199
Potential Stage		Date Date		Assign	nment List —		
Income Business Inc	120,000	Tax Tax	35%	4	- 🗂		-
State of Birth Height	CA	Net Worth Weight	500,000		Aç Paladian, Ma	jent ark	Created 06/21/1999
Language House Member	English Head		~				
Important Dates	Important Dates				rks		

Figure 2: The Picture icon on the Additional Personal tab.

- Use the Windows **Open** window to locate the image.
- Select the image and click **Open**.
- The image will be added to the **Additional Personal** tab and embedded in the CDS database.

The image will also be automatically added to the **Letters/Documents** tab of the contact record. To view the image entry, click on the **Letters/Documents** tab and the image will appear in the **Documents** section with the keywords **CONTACT_PHOTO**.

	Description	Contact	Date	Keywords	File	
	SmartOffice_v50SmartOffice_	O Ackerman, Joseph	05/15/2006		pdf	
-	Header logo	Ackerman, Joseph	03/25/2005	Header logo	bmp	
	2nd Year Term Renewal Letter	Ackerman, Joseph	01/05/2000		JPG	
-	College Funding Letter	Ackerman Joseph	12/15/1999		JPG	
		Ackerman, Joseph		CONTACT_PHOTO	ipg	

Figure 3: The Documents section of the Letters/Documents tab.

To add a description, tag the record and click the **Modify Record** button in the toolbar.

Adding a Contact Picture with a Right-click (Using a Linked Image):

Before using a linked image to add a picture to a contact record, you will need to link the image to the contact's **Document** section of the **Letters/Documents** tab.

To Link an Image:

- Click the Attach File button in the Documents toolbar.
- Select the Link option in the Document/Image Type section of the Document/Image Description window.

🗖 Document/In	nage Description 🛛 🔀
Client Name	Ackerman, Joseph
File <u>N</u> ame	
Description	
Keywords	
_Document/Image	Туре
	💿 Link
(OK Cancel Help

Figure 4: The Documents/Image Description window (Link option selected).

- Click the **File Name** button to locate the image. Select the image and click **Open** to define the path for the link.
- Add description and keywords as necessary.
- Click **OK** to create the link.

Using a Linked Image to Add a Picture to a Contact Record:

- Right-click on the Picture icon on the Additional Personal tab.
- Select the Assign Picture (Image Log) option.

📽 Contact - Dr. Joseph M. Ackerman, M.D. (50)						
Summary	Personal	TA	dd'l. Personal	T	Key Relations	Benefits
Misc. Personal Ir	nformation			h	Set Membership	
Drivers Lic.# Lic.State Maiden Name	G5418888 CA					
Last Dr.Appt	11			ll Assig	gn Picture (Image Log)	
Potential		Date	11 0	Char	nge Picture	L.
Stage		Date		-		
Income	120,000	Tax	35%	6	++ 籠 🔄	
Business Inc.	2,162,691	Tax	50%	6		
State of Birth	CA	Net Worth	500,000	Ĵ.	Peledien Mark	06/21/0000
Height	·	Weight				00/21/1000
Language	English		~	•		
House Member	Head		~	•		
Important Dates Remarks						

Figure 5: The Right-click context menu for the Picture icon.

• The **Document Log** will open. Select the image to be used as the contact picture and click the **OK**, **Select** button in the **Document Log** toolbar.

🗖 Document Log - Joe Ackerman (5)							
I =	÷ 🐛 í	í 🖄 🛃 🛯	V Ď 🔻 🖉				
Contact	Date	Description	Keywords	File Exten 🐴			
Ackerman, Joseph	06/02/2006	Joe's Picture	Client Photo	ipg 📃 🗐			
Ackerman, Joseph	05/15/2006	SmartOffice_v50S		pdf			
Ackerman, Joseph	03/25/2005	Header logo	Header logo	bmp			
Ackerman, Joseph	01/05/2000	2nd Year Term Renev		JPG			
Ackerman, Joseph	12/15/1999	College Funding Letter		JPG			
				~			
<	1111			>			

Figure 6: The Document Log.

• The selected image will be added as the contact picture on the **Additional Personal** tab.