Tel-Me

Address Book

Using the Address Book

The Address Book is a central feature within several Tel-Me products and as a common element it allows you share your list of contacts between programs. Thus, changes made to the Address Book within one product will be viewed exactly the same in the other products.

To access the Address Book, select the Address Book... option from the Options menu. The following dialog will be displayed:

Address Book

Find: [   ]   Settings...

Fred Smith	ABC Ltd
Joe Bloggs	CyberNut PLC
John Doe	XYZ Ltd

Add ...   Delete   Edit...   Close

Click on the required item for more information.

From here you can:
- Add a new entry,
- Edit, Delete or Find an existing entry,
- Configure numerous Address Book (global) Settings,
- Exit from the Address Book by clicking Close.

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Tel-Me

Address Book

To Add a New Person

To Add a new person entry, click the **Add...** button within the main Address Book dialog. The New Person dialog will be displayed as follows:

Click on the required item for more information.

In addition to using the information fields, you can also:

- Add other details by clicking the Extras... and/or Virtual Secretary buttons.

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Tel-Me

To Edit a Person

To Edit an existing person, select the required entry and click the **Edit...** button in the main Address Book dialog. The following will be displayed:

Edit Person

Full **N**ame:	Fred Smith
Unique Name:	Fred Smith
Title:	Mr
Company Name:	ABC Ltd
E-Mail Address:	fsmith@abc.co.uk
Address:	The Old Barn
	Corndean Lane
Location:	Cheltenham, Gloucestershire
Postcode:	GL7 8QZ
Telepho**n**e:	01234 56789 E**xt**: 123
Fax:	01234 98765
P**h**oto File:	fred.bmp

OK **Cancel**

Virtual Secretary

Ex**t**ras...

Browse...

Click on the required item for more information.

In addition to using the information fields, you can also:

▪ Add other details by clicking the <u>Extras...</u> and/or <u>Virtual Secretary</u> buttons.

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Tel-Me

Address Book

Extra Details

To add or edit additional details for a person, click the Extras... button within the New Person or Edit Person dialog. The Extra Details dialog will be displayed as follows:
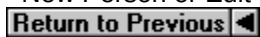
Extra Details for Fred Smith

Salutation: Dear Fred

Notes: Usually plays golf on Thursdays
Club night on Fridays

OK   Cancel

Click on the required item for more information.

When you have added the required details for the person, click on OK to store them and return to the New Person or Edit Person dialog.

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Virtual Secretary

Allows you to designate a secondary recipient for E-Mail messages that cannot be delivered to the currently selected person within the Address Book.

To designate a Virtual Secretary for a person, click the **Virtual Secretary** button within the New Person or Edit Person dialog. The Virtual Secretary dialog will be displayed as follows:

Virtual Secretary for Fred Smith

Na**me:**

When to send files:- ⦿ Ne**v**er
○ On Destination **E**rror
○ **A**lways (Copy To)

OK   Cancel

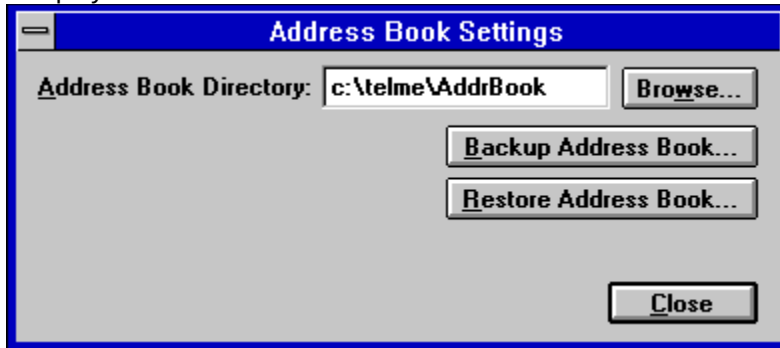Click on the required item for more information.

When you have selected the appropriate contact to receive undelivered messages for the current person, click on OK to store them and return to the New Person or Edit Person dialog.

Address Book

Address Book Settings

The Address Book Settings dialog you to configure various standard and Tel-Me Now!-related details. To view it click the Settings... button within the New Person or Edit Person dialog. The dialog will be displayed as follows:

Click on the required item for more information.

From this dialog you can:
- Change your Address Book Directory location,
- Backup your Address Book by storing a copy in a different system location,
- Restore a previous backup of your Address Book,
- Click Close to return to the main Address Book dialog.

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Finding an Entry

To find an entry held within the Address Book:

1. Position the cursor within the Find field at the top left hand corner of the Address Book dialog.
2. Begin typing the name of the person. As you do this, the contact list below will move through the entries and home-in on the required person as you enter more characters.
3. Now you can Edit or Delete the entry as required.

To Delete a Person

To Delete an existing person, select the required entry and click the **Delete...** button within the main Address Book dialog. A confirmation dialog will be displayed and if you are sure that wish to delete the selected entry, click the Yes button within the dialog.

After confirming the delete operation, the selected entry will be removed from the Address Book.

Virtual Secretary

Allows you to designate a secondary recipient for E-Mail messages that cannot be delivered to the currently selected person within the Address Book.

The secondary recipient or Virtual Secretary can be anyone whose details (including E-Mail address) are held within your Address Book.

Find

This field allows you to quickly locate an entry held within the Address Book, To do this:

1. Position the cursor within the Find field at the top left hand corner of the Address Book dialog.
2. Begin typing the name of the person. As you do this, the contact list below will move through the entries and home-in on the required person as you enter more characters.
3. Now you can Edit or Delete the entry as required.

Contacts List

This area displays the names of the contacts (in alphabetical order) that are currently held within the Address Book. You can scroll through the entries displayed here or use the Find field above to quickly locate the required contact. The highlight bar indicates the currently selected contact name. To move the highlight bar, either:

- Click on another entry with the left hand mouse button, or
- Enter the required name into the Find field above, or
- Use the keyboard cursor keys, or
- Use the keyboard PgUp, PgDn, Home or End keys.

Add...

Displays the New Person dialog so that you can amend the Address Book with a new contact entry.

Delete

Selects the currently highlighted entry in the Contacts List for removal. A confirmation dialog will be displayed allowing you to cancel or proceed before the delete action is carried out.

Edit...

Displays the Edit Person dialog showing the details of the currently highlighted entry in the Contacts List.

Settings...

Displays the Address Book Settings dialog where you can:
- Change the local of your Address Book files,
- Create a backup copy of your Address Book,
- Restore a previous Address Book backup.

Close

Exits from the Address Book and retains any changes made.

OK

Exits from the dialog box and saves any changes made.

Cancel

Exits from the dialog box and discards any changes made.

Full Name

This is where you enter the full name of the person. You can enter the Christian name first followed by the surname or vice versa. Whichever format you decide upon it is recommended that you use it consistently for all entries to make name searching (using the find feature) more straightforward.

This is a mandatory field for each person entered.

Unique Name

This field contains the name that the person will be listed under within the Address Book. Once you have entered a name into the Full Name field, it will be automatically copied into this field.

As the field name suggests, this name must be unique within the Address Book, a warning will be displayed if someone with the same Unique Name is already held.

This is a mandatory field for each person entered.

Title

Allows you to enter the appropriate title for the person, i.e. Mr, Mrs, Miss, Ms, Dr.

Company Name

Use this field to optionally enter the organisation where the person works.

E-Mail Address

If you know the E-Mail address for the person, enter it into this field. When you use Tel-Me Internet E-Mail, this address will be automatically used when the person is selected.

Address

Optionally enter the building name/number and street/road for the person into these fields.

Location

This optional field allows you to enter the name of the village, town or city for the person. Typing the first character makes a list of possible matches appear. Further typing refines the list until a single match is left. Alternatively, scroll through the list using the cursor up/down or page up/down keys to highlight the required location. Use the TAB key to select the highlighted location.

Postcode

Use this field to store the Postcode for the person.

Telephone

Use this field to store the telephone number for the person.

Fax

Use this field to store the fax number for the person.

Photo File

This field is used to optionally store the location of a photo image of the person, if available .....

Ext

Use this field to store a telephone extension number, if applicable, for the person.

Extras...

Displays the Extra Details dialog where you can enter more information about the person such as the correct salutation to use in DeskMail entries plus general notes and comments.

Virtual Secretary

Displays the Virtual Secretary dialog where you can designate a secondary recipient for E-Mail messages that cannot be delivered to the currently selected person within the Address Book. The secondary recipient or Virtual Secretary can be anyone whose details (including E-Mail address) are held within your Address Book.

Salutation

Use this field to store the salutation that you normally use for the selected person in correspondence. This feature is used in mailshot letters created in the DeskMail product.

Notes

This field allows you to optionally enter notes and comments in connection with the person.

Virtual Secretary

Name
Allows you to designate a contact name to which messages should be sent when triggered by an event selected within the **When to send files** section below.

Virtual Secretary

When to send files
Allows you to select the conditions under which messages are sent to the designated Virtual Secretary. The options are currently:

- **Never**   Messages are not sent under any circumstances (i.e. feature disabled).
- **On Destination Error**   Messages are redirected to the designated Virtual Secretary if they cannot be delivered to the currently selected person.
- **Always (Copy To)**   This option is not currently operational and will remain greyed-out.

Address Book Directory

Allows you to change the location of your Address Book files. Clicking the Browse... button displays a standard Windows dialog so that you can easily search for, and select an appropriate directory.

Backup Address Book...

Allows you to create a backup copy of your Address Book files. Clicking the button displays a standard Windows dialog so that you can easily select an appropriate directory in which to store the backup files.

Restore Address Book...

Allows you to restore a previously created backup copy of your Address Book files. Clicking the button displays a standard Windows dialog so that you can easily search for the appropriate backup directory and files.