

## About Address Books

Although you can have multiple address books on your client machine, you can only display and use one address book at a time.

You can do the following with Address Books:

- Locate a personal or global address book entry to edit or view.
- Add and delete address books.
- Add, modify and delete your personal address book contacts.
- Create local groups consisting of contacts from your address book. Use groups to send the same message to multiple contacts at the same time.
- Import an existing 4-Sight FAX version 4 address book, or a tab-delimited text file that was created or exported from another application.
- Unless the 4-Sight FAX administrator granted you specific rights to do so, you cannot delete or Modify Server-based address book contacts or the Apple Address Book from the Client. You also cannot create contact groups using Server address book contacts.
- Groups can only be made up of saved Client address book contacts.
- Client address book contacts are specific to your fax Client installation, and therefore are not available to other fax Client users.

## Opening and Creating Address Books

Although you can have multiple address books, only one address book is displayed and available at a time.

### How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. Use the following chart to continue:





| To...                                | Then...   |
|--------------------------------------|---|
| <b>Create</b> a new Address Book     | On the <b>File</b> menu, point to <b>New</b> and select <b>Address Book</b> .                           |
| <b>Open</b> an existing Address Book | On the <b>Tools</b> menu, click <b>Select Address Book....</b> Locate the address book you want to use. |

### Note:

- When you create a new address book, 4-Sight FAX Client automatically saves the current address book to the default location; *Documents* on MACs and *My Documents* on Windows.

## Creating, Modifying and Deleting Address Book Contacts (Entries)

The following table indicates what the address book icons indicate:



| Address book Icon   | Description                  |
|---|------------------------------|
|  | Personal address book entry. |
|  | Server address book entry.   |
|  | Group address book entry.    |
|  | Apple address book entry.    |

**Note:**

- If you were given the appropriate 4-Sight FAX Server privileges, you can also add (save), delete, and modify fax server address book entries.

**How do I?**

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. From the Folders List, click on the Address Book, located below the **Sent Faxes** folder.
3. Use the following chart to continue:

| To...                             | Do the following:  |
|-----------------------------------|--|
| <b>Create</b> a new contact       | On the File menu, point to <b>New</b> and select <b>Contact</b> , or click  from within the Address Book. Proceed to step 4. |
| <b>Modify</b> an existing contact | Double-click any contact. Continue to step 4.  |
| <b>Delete</b> a contact           | Select the contact you want to remove and click  .  |

4. Provide the appropriate information, from each tab, to create or modify an address book entry.

|                    |  |
|--------------------|--|
| <b>From the...</b> | <b>Provide or modify the following contact information...</b>  |
| <b>Contact tab</b> | <p><b>Full Name</b> - The first and last name of the contact.</p> <p><b>First/Last Name</b> - The first and last name of the contact.</p> <p><b>Salutation</b> - Mr., Mrs., Ms., Dr., Dean and Professor. You may also add your own.</p> <p><b>Company</b> - Name of the company or organization where this contact is employed.</p> <p><b>Title</b> - The contact's professional title in the company.</p> <p><b>Smart Dialing</b> - Click this option to allow the Fax Server to attach the appropriate prefix dial code(s) as well as any long distance digits when necessary. If you do not click this button, you must supply all necessary dialing information (prefix codes and long distance digits) yourself.</p> <p><b>Country (code)</b> - The international code that identifies from which country you are sending this message.</p> <p><b>Fax (Area-Num)</b> - Provide the area code or city code and then the fax number in the appropriate fields.</p> <p><b>Email</b> - The Email address of the intended receipt(s).</p> <p><b>Category</b> - An additional method for organizing or grouping your contacts.</p> |
| <b>From the...</b> | <b>Provide or modify the following contact information...</b>  |
| <b>Address tab</b> | <p><b>Address 1</b> - Enter the street address of the contact.</p> <p><b>Address 2</b> - Enter additional mailing information here.</p> <p><b>City</b> - Enter the name of the city or township of the contact</p> <p><b>State/Province</b> - Enter the name of the state or province of the contact.</p> <p><b>Postal Code</b> - Enter the postal or zip code of the contact.</p> <p><b>Phone Number</b> - Enter the phone number of the contact.</p>   |
| <b>Other tab</b>   | <b>Custom 1-3</b> - Use these fields to capture additional information about the contact.  |

| From the bottom of each New/Modify Contact tab... |   |
|---|---|
| Save to address book                              | <p><b>By default, all address book entries are saved to the local address book.</b></p> <p><b>Note:</b></p> <ul style="list-style-type: none"><li>▪ If you were given the appropriate 4-Sight FAX Server privileges, you can also add (save), delete, and modify fax server address book entries.</li></ul> |

5. Click **OK**.


**Notes:**

- You can have as many personal address books as you want, however, you can only have one address book active (displayed) within 4-Sight FAX Client at one time.
- You must provide at least a name (first and last) and a fax number.
- If you do not click the **Smart Dialing** option, you must supply all necessary dialing information, such as a “1” for dialing long distance or “011” for dialing international.
- Server-based address book contacts are identified with a bullet to the left of the name.
- Unless the 4-Sight FAX administrator granted you specific rights to do so, you cannot Delete or Modify contacts from the Server-based address book or from the Apple address book from within the 4-Sight FAX client.
- Your personal address book contacts are specific only to your fax Client account and are therefore not available to other fax Client users.

## Creating, Modifying and Deleting Address Book Groups


### How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. Select the personal address book that contains the groups you wish to manage.
3. The following chart describes your current options for managing groups:

| To...                           | Then...   |
|---------------------------------|---|
| <b>Create</b> a new group       | Select a contact (or multiple contacts) from your address book. 4-Sight FAX Client assumes that you want those contacts included in your new group.<br><br>On the File menu, point to <b>New</b> and select <b>Group</b> , or click the New button.<br><br>Proceed to step 4 to add contacts to this group. |
| <b>Modify</b> an existing group | Double-click on a group name.<br><br>Proceed to step 4.   |
| <b>Delete</b> a group           | Select the group you want to permanently remove from your address book and press the  icon.  |

4. Provide or change the **Group Name**.

5. Use the following chart to continue:

| To...                                  | Then...   |
|--|---|
| <b>Add contacts to your group</b>      | <p>A list of available contacts from your current personal address book appears in the <b>Available</b> list box. You can multi-select contacts by pressing the <b>Command</b> key for Macintosh or the <b>Ctrl</b> key for Windows and clicking on the desired contacts.</p> <p>Drag the selected contacts into the created group.</p>   |
| <b>Remove contacts from your group</b> | <p>A list of selected contacts from your current personal address book appears in the <b>Selected</b> list on the right. You can select multiple contacts and remove them from a group by pressing the <b>Command</b> key for Macintosh or the <b>Ctrl</b> key for Windows and click left.</p> <p>Click the  icon.</p> |

6. Click **OK**.

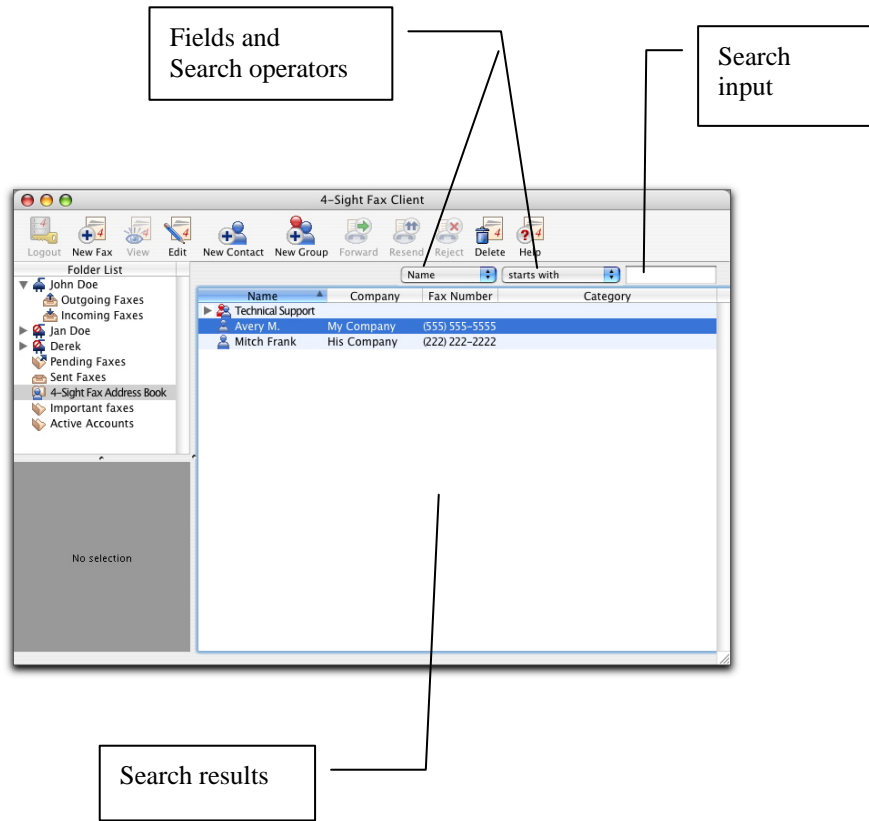
**Tip:**

- You can select multiple sequential contacts by selecting the first contact, hold down the <Shift> key and select the last contact. All contacts in that range are selected.

**Notes:**

- You can include as many groups to your personal address book as you want.
- You cannot create groups using the Server-based address book contacts.
- You cannot create groups within existing groups.
- Removing a contact from a group does NOT remove the contact from your address book. However, if you remove a contact from the address book, it is also deleted from any groups it belongs to.
- You cannot edit contact information from Apple Address book on the 4-Sight FAX Client.
- You can edit, add, and delete server address book contacts if given permission in the User Account Setup, located on the 4-Sight FAX Server.
- Does not support “smart groups” in Apple Address Book.

### Searching an Address Book



**How do I?**

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

Under the **Folder List**, click on your address book or the group that you want to search.

2. Select the field and search operator you want to use, and provide the appropriate input to define your results. The following chart displays your options:

| Fields  | Search operators   |
|---|--|
| <ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Company</li> <li>▪ Fax Number</li> <li>▪ Category</li> </ul> | <ul style="list-style-type: none"> <li>▪ Starts with</li> <li>▪ Ends with</li> <li>▪ Is</li> <li>▪ Is empty</li> <li>▪ Contains</li> <li>▪ Does not contain</li> </ul> |

3. The filtered address book contacts are displayed.
4. To remove the filter, clear the search input field.

**Notes:**

- The search option filters address book contacts for display purposes only. You cannot import address books with the filter you selected.
- Each search is performed only on the current address book, not including any groups you may have. To only search for names in a group, you must first select that group from the Folder List.

## Importing Address Books

**How do I?**

1. On the **File** menu, select **Import**.
2. Choose the type of address book you want to import. You can choose a 4-Sight FAX **version 4** or a **tab-delimited** text file, which you may have exported from another application. Locate the file, and click **Import**.
3. If you import a Version 4 address book, the contacts are immediately inserted into your current Client address book. All fields are matched to your current address book automatically.
4. If you select Delimited file, an interface will appear that allows you to map the fields of your tab-delimited file to those in the 4-Sight FAX Address Book.

## Using the Mapping Interface

Highlight the first Target field in the right column of the window. Then choose one Source field from the left column (your list of headers) that best matches the Target field. Click **Map**. Your Source field now becomes an Import field and moves into the mapping column. Repeat the process until all of your headings are mapped, and then click Import.

**Notes:**

- First and Last names are automatically copied, combined (first name <space> last name) and placed into the **Name** field of your Client address book. The reason for this is because the Fax Client window and Fax Composer only display the Name field.
- Make sure that your tab-delimited address book has the correct field heading listed in the very first row of each column. Otherwise, your list will not be properly imported.