Chapter

3

Address Book

Introduction

DeskTop Set's Address Book looks like the usual phone book, and, like its paper counterpart, is simple to use, logical, and low-key. Its simplicity is apparent from the beginning. As soon as you start the program, you may click instinctively on letter tabs, arrows, and keyboard keys to navigate the pages.

Address Book Features

Below is an illustration of the program's Page view. Try exploring Address Book on your screen by clicking on the controls and seeing how they respond.

The title bar shows you a description of the open book.

Topic pages, displayed in bold type, list related records. Double-click to open.

The page number tells you which page is open. Each letter can have many pages.

The toolbar lets you access common commands quickly.

Subject tabs provide shortcuts to important information.

The page letter shows you which letter is open.

Letter tabs switch to another letter.

Page names can be actual names or mnemonic references. Double-click to open a View window.

Gray cloned entries let you list names in more than one location.

Page phone— double-click to dial.

File tabs open different address books.

The status bar shows date, time, and information on the current task.

Sample Address Book

File Edit View Search Dial Schedule Log Page Windows Help

Acer

Party Guest List   IBM   Travel   Meg   Services   Chicago Trip   Family   Ambria

Back   Cover   Pages   List   Database   Deleted   Press Contacts   Okna Corporation

L   **1**

L.L. Bean	800-221-4221	**Large Customers**
La Reserve	212-247-2993	**Large Evaluations**
Landmark Research Int'l	800-683-0584	**Legal Committee**
Lark in the Morning	707-964-5569	
Laser Cartridge Recharge	801-226-1590	
Leading Edge Computers	508-836-4800	
Lexmark International, Inc.	606-232-2000	
Library Software Review, Inc.		
Los Angeles Times		
Lotus - Jamie Smith	617-577-8515	
Lotus Development Corporation	617-577-8500	
Lotus Magazine		
Lyben Computer Systems	800-493-5777	
Lyndhurst Post Office	201-438-3938	

My Book   Okna Corp Network Address   Sample   Senator's Book

Tue, October 29, 1996   Dear ,   4:14 PM

As you can see, the program's appearance does not differ much from a paper address book. The design is intuitive (even for novices) and comfortable to work with all day.

To help you concentrate on understanding what Address Book does rather than what each term means, this chapter first describes the program's essential elements and controls. If you find an unfamiliar Windows term, please review your Windows documentation. Here are the essential Address Book definitions:

Term	Definition
Database	A computer file that stores information. Address Book uses the Btrieve database engine from a company called Btrieve Technologies (spun off from Novell). It is the same database used in over 10,000 commercial products, including Novell's network directories, Peachtree Accounting, Solomon Accounting, and Platinum. Its speed, reliability, versatility, and compactness have been proven with long-term use.
Field	A piece of information. For Kevin's entry, the first name field contains *Kevin*, the last name field contains *Taylor*, the company name field contains *Okna Corporation*, and the position field is *Marketing Manager*.
Record	A unit of storage in a database comprised of all fields for a name. Address Book entries might have information for a person, company, credit card, etc. For example, Kevin's record might have the following information in various fields: *Kevin Taylor*, *Okna Corporation*, *201-909-8600*, *P.O. Box 522*. The term "record" can encompass all types of entries in your address book, such as *Mom*, *John Smith*, *Doctor*, *Social Security Office*, etc.
Entry	Unlike a record, which is a physical unit in a database, an entry is an abstract term that points to a record. For example, *John Smith*, *Okna Corp.*, and *153-555-4877* (Social Security number) are all valid entries. *John Smith* or *Okna Corp.* points to a record containing his company name, address, and telephone numbers. *153-555-4877* might point to a record with the local Social Security office's address.
Cloned entry	This is a second, third, or greater entry for one record. Cloning a record allows you to list a person or company under several names on several pages, while still retrieving the same information. This means you can make changes in the clone that appears in the original; they are both using the same information.
	Clones let you store records under their actual name and a mnemonic reference. They let you list your lawyer under his name, *Joseph Cohn*, and under the entry *Lawyer*. When you need to call him, you don't have to remember who he is. All

you need to know is *Lawyer*. Think of cloned entries as two doors (names) entering the same room (the record).

Page view

This has a traditional book appearance, like a phone book or a paper organizer. It displays two opposing pages, each holding a list of entries. Every entry shows its page name and page phone. Double-clicking on an entry's page name opens its folder.

If you have been a long-time user of a paper organizer, you may find this view to be the best interface since it is familiar. The book is divided into alphabetic letters, represented by alphabet tabs along the sides of each page. To switch to another letter, just click the appropriate tab. You may also use the left and right arrows in the toolbar to flip individual pages, scrolling back and forth just as in a paper book.

The Page View's true strength comes in its ability to use mnemonic entries. Since an entry's page name is completely independent of the person's actual or company name, you can list entries by any name you wish. For example, if you see your eye doctor only once a year, you may not remember her name from visit to visit. Instead of listing her as *Dr. Sarah Fuller*, show her on your D page as *Doctor*. When you open her folder, you will get full information, such as her real name and address. Then, when you need to schedule an appointment, all you need to remember is *Doctor*.

Since Page View uses a traditional paradigm, this is probably the fastest way to begin using Address Book and become more productive.

List view

If you are accustomed to working with spreadsheets, you may prefer this view. It displays records in a column–and–row tabular format, similar to a traditional database format. If your address book has many thousands of records, you may not want to scroll through ten or more pages for each letter. In List View, you can just scroll continuously through your entire database until you find the name you need.

If you like to customize your display, you will also prefer List View. Since it operates like all other DeskTop Set lists, you can select which fields are displayed, how the list is sorted, and change display colors so it is easier to read. You can save your settings as a *list style*, which can be recalled at any time. Therefore, you can have a list of names and phone numbers when you need to make calls. Another style can show you companies and addresses when you are writing letters.

List View is Address Book's most flexible interface, so if your needs are specialized, you should consult the *List* chapter to learn how to customize and use this view.

Here is an illustration of the list view:

Use subject tabs to quickly switch to records, categories, groups, or topics.

This arrow appears in the column that is sorting the list. Click another column header to sort by that field.

Use the letter tabs to jump to a specific letter.

You can shade alternate rows for greater legibility.

Use the file tabs to switch between books with a single click.

Using the list view, you can scroll quickly through thousands of names. You can choose the column order and sort the entries by any of several fields: person's name, company, address, zip code, etc.

Page name   An entry on a page that references a record in the database. Here is an example:

When you call Lotus Corporation to order a new software product, you speak to Jamie Smith, your sales representative. How would you list this in your address book – as *Lotus Corporation* or *Jamie Smith?*

It really depends on what you think of when you need to place an order. Regardless of the name which comes to mind first,

the database record stores the names of the company, sales rep, telephone numbers, address, etc. But, unlike a traditional database, the Address Book lets you decide how to list it — *Smith–Lotus*, *Lotus–Jamie Smith*, *Lotus Corporation*, or just *Software Orders*. A page name can also be a nickname or associative word, like *Mom* or *Travel Agency*.

Page phone
The phone number you use most frequently to call a person. Your records can have several phone numbers in them: a business number, home, fax, car phone, etc.

Which one do you commonly use? For *Okna Corporation*, it might be our fax number. For *Microsoft Technical Support*, it could be their automated support line. Your close friends would be a home number. All of these make good page phones. Just double-click to dial. Other telephone numbers are dialed as easily using the **Dial** menu.

Here is an illustration of page names and page phones:

As you can see, page names can be Mom just as easily as they can be formal names, like Memorial School.

Folder
This lets you organize client-related information into a concise and neat format, similar to a manila folder in a filing cabinet. It holds contact information (such as names, addresses, and phone numbers), phone log histories, related files, notes, and more. You may have as many folders open at once as needed, just like on your desk.

If you are calling several people, for example, you may want to open all their folders. As you complete each call, you can close the window. Try double-clicking on any name to bring up its folder.
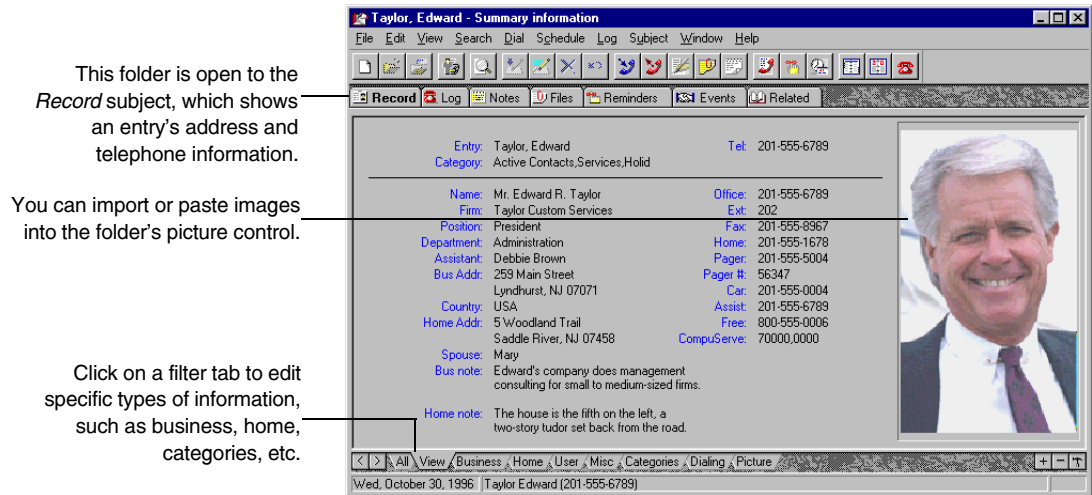
This is a folder for Edward Taylor. It shows you a concise synopsis of his entry's information.

This folder is open to the *Record* subject, which shows an entry's address and telephone information.

You can import or paste images into the folder's picture control.

Click on a filter tab to edit specific types of information, such as business, home, categories, etc.

Page letter Displayed in the upper left corner. Just like a paper organizer, Address Book's pages are separated into letter sections.

The illustration on page 58 is open to **L**, with page names like *La Reserve* and *Laser Tools*. You are not limited by this page letter. If you have an entry for the *Smithsonian Library*, you may want to list it on the **L** page for *library*. Even though it begins with *S*, *Smithsonian Library* is just as welcome on the **L** page as *Library of Congress*.

Page number Displayed in the upper right corner. If you have hundreds of records, you may add as many pages as you like for each letter or topic (see *Topic pages* below). The page number shows you which one you are viewing. The Address Book illustration at the beginning of the chapter shows page **1** of the letter **L**.

Categories Assigned to a name. This is another piece of information, like a company name, that can be shared with many records.

You probably know different doctors: a general practitioner, an eye doctor, an allergist, a dentist, and so on. You can assign a *Doctor* category to all these records, then view them all together. Other categories might be *Airlines*, *Lawyers*, *Press Contacts*, *Advertising Agencies*, *Car Mechanics*, etc.

Groups A list of related names. They are useful when names must be added and removed frequently.

Imagine you are organizing a company party, and need a guest list. You can create a group called *Guests*, and put all

your office's employees in it to print out invitations. If a person RSVP's that they cannot attend, just remove them from the group. When the party is over, you can delete the whole list with a click. Here is an example of a group:
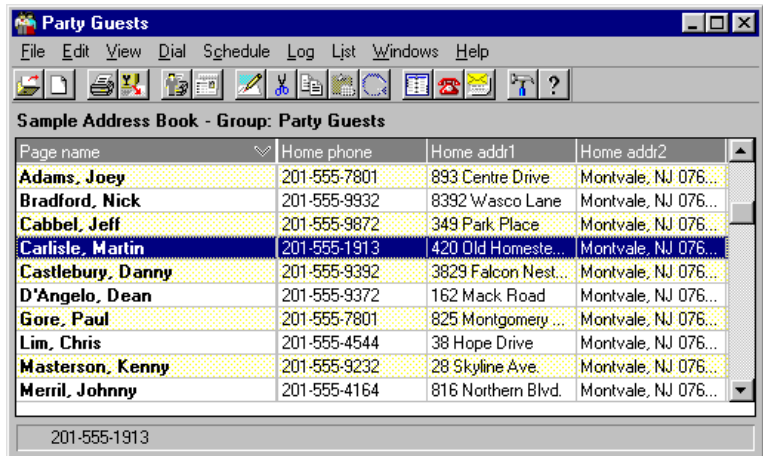
The Party Guest List group in Kevin's sample book. If someone tells him they cannot come, he uses the ✂ button to remove them from the group.

Topic pages

A page-within-a-page that lists related records. Topic pages can be placed inside other topic pages, so you can create an outline structure.

If you need to order a new computer mouse, you can call different catalogs for the best price. You might not remember the names of all the mail order companies you use, though. If you create a **Mail Order** topic page, you can list all these catalogs in one place. All you have to know is *Mail Order*.

Other examples for topic pages would be **Sailing Club Members, Okna Employees,** and so on. In the Address Book illustration on page 58, **Large Customers** is a topic.

File tabs

You probably need to work with more than one address book. For example, you might have separate personal and business files, and your colleagues have their own books over a network.

File tabs open different address book files with one click. This is similar to the way you can switch to different spreadsheets in Microsoft Excel or Lotus 123. If you create a file tab for each book you use, you can open a new file quickly and easily. File tabs avoid the hassle of constantly using a Windows *Open File* dialog window.

In the illustration on page 58, you see file tabs for *Senators* (an Address Book with senator's entries), *Business records* (containing business contacts), and *Personal book* (holding personal friends and family members).

Subject tabs   Allow you to go to a desired page or list groups and categories with one click. There are certain names, topics, groups, and categories that you will use frequently. If you create subject tabs for these, you can retrieve them immediately.

The illustration on page 58 has all four kinds of subject tabs. The **Travel** tab opens that topic page. **Party Guest List** opens a group of people belonging to that committee. **Active Press Contacts** brings up a category of airline carriers, and **Meg** brings you to her record.

Letter tabs   Take you to specific letters in your address book. For example, if you need the **G** section, click on the **G** tab. Address book then opens page **G-1**. In the illustration of Address Book's window, letter tabs line the page's outside edges.

Now that you have basic terminology down, you can concentrate on how Address Book helps you stay organized.

Working with Pages

Sorting entries

You can sort all of the entries in any Address Book letter or topic. This includes any extra pages you may have added for that letter.

To sort Address Book pages:

♦ Turn to the first page of the topic or letter.

♦ Select the **Page/Sort** command.

♦ Select the *Sort Method* that you wish to use.

♦ Click on the **Sort** button.

Adding pages

For each letter in Address Book, you have two facing pages, each capable of holding nineteen entries. Of course, Address Book can accommodate many more entries than this. If you should run out of room on any particular letter page, you can simply create another pair of pages for that letter. In fact, the first pair of pages does not even have to be full — you can create new pages at any time.

You can only create an extra page from the last page for that letter. Therefore, if you have two **C** pages and you want to create a third, you must turn to the second **C** page before you can do this.

To create a new page:

♦ Turn to the last page of the letter or topic for which you wish to add a new pair of pages.

♦ Select the **Page/Add page** command.

The new page is created, and the book turns to that page. Notice that the page letter is displayed in the upper left corner of the page, and the number is displayed in the upper right.

To turn pages:

♦ Click the ⇨ button on the toolbar or press the **PgDn** key to turn to subsequent pages for that letter. If there are no more pages for that letter, the next letter is displayed.

♦ Click the ⇦ button on the toolbar or press the **PgUp** key to turn to the previous page.

Note: If you turn to the last page of a topic, Address Book does not let you go any further because the end of a topic is not linked to a following letter page. You must back-track to a letter page before you can continue turning pages.

Deleting pages

To delete a page:

♦ Turn to the extra page you wish to remove.

♦ Make sure all entries you need to save have been copied or moved to another page.

♦ Select the **Page/Delete page** command. Address Book asks you to confirm your desire to delete the selected extra pages. The selected pages are deleted.

There are a few points to remember about deleting pages:

✦ You can only remove the last page for any particular letter.

✦ The first page for each letter can never be removed.

✦ If you remove a letter page, all entries on that page are lost unless they are cloned elsewhere.

Using Tabs

Address Book uses *Subject* and *File* tabs to organize your entries. These tabs make moving between subjects and files easy, and also allow you to copy records into groups, categories, topics, and other address books instantly using drag-and-drop.

Subject Tabs

Subject tabs appear below the toolbar. They are used for frequently accessed names, topic pages, groups, or categories. Clicking on the any tab brings you to the corresponding record(s).

Default tabs

There are several default tabs in each address book. They are:

Option	Description
Back	Click here to move to the most recently accessed entries.
Cover	Click here to close Address Book and view its cover. This is useful for keeping the book active while freeing up screen area.
Pages	This displays entries in Page view.
List	Displays all entries for the current subject (group, topic, etc.) in List view.
Database	Shows your entire address book in List view.
Deleted	When you delete an Address Book record, it is moved to this tab. Use this tab to list deleted records, and recover them if you have accidentally deleted an entry. The **Cut** command (or icon) deleted the record permanently.

Creating a subject tab

To add a subject tab for an entry:
♦ Left-click on the address book entry and hold down the mouse button. The cursor changes shape.
♦ Drag the cursor to the area between the toolbar and the page view.
♦ Release the mouse button. A tab is created for the record.

To create a subject tab for a topic page:
♦ Select **View/Topics...** command, **or...**
♦ Find the Topic in page view.
♦ Left-click on the topic name and hold down the mouse button. The cursor changes shape.
♦ Drag the cursor to the area between the toolbar and the page view.
♦ Release the mouse button. A tab is created for the topic page.

To set up a subject tab for a group:

♦ Select **View/Groups...** command.

♦ Left-click on the group name and hold down the mouse button. The cursor changes shape.

♦ Drag the cursor to the area between the toolbar and the page view.

♦ Release the mouse button. A tab is created for the group.

To create a subject tab for a category:

♦ Select **View/Categories...** command.

♦ Left-click on the category name and hold down the mouse button. The cursor changes shape.

♦ Drag the cursor to the area between the toolbar and the page view.

♦ Release the mouse button. A tab is created for the category.

Editing subject tabs

To edit a Subject tab:

♦ Right–click on the tab.

♦ Make any necessary changes to the tab name.

♦ Select a presentation format to determine if the tab contents are viewed from the page view, or one of the list templates.

♦ Click **OK** to save the changes, or **Cancel** to discard the edits.

Click here to open the subject in a separate list window. This lets you view the list while working with other Address Book subjects.

Edit subject tab	✕
Tab - group	
_N_ame:	
Party Guest List	
_P_resentation:	
Business presentation ▼	
Options	
☑ _O_pen in separate window	
_D_elete	OK	Cancel

Right-clicking on a Subject tab opens this dialog box. You can edit or delete the tab using this window.

To delete a Subject tab:

♦ Right–click on the tab

♦ Click on the **Delete** button.

File Tabs

These tabs appear below the Page or List view. They are used to give one-click access to other local or network address books.

Creating file tabs

To create a file tab for an address book you have used before:

♦ Click on the ⊞ button in Address Book's lower right corner. The *Available Address Books* list opens.

♦ Double-click on the address book that you want to create a file tab for.

A file tab is created for the selected book. For an address book to be listed in the *Available books* list, it must have been opened once using the **File/Open...** command.

To create a file tab for an address book you have never used before:

♦ Select **File/Open** from the menu.

♦ Select and open the address book file. A file tab is created automatically.

Editing file tabs

To edit a File tab:

♦ Right-click on the tab, **or...**

♦ Select a File tab and click on the ⊤ button in Address Book's lower right corner.

♦ Make any necessary changes to the tab name.

♦ Click on **OK** to save the changes, or **Cancel** to discard the edits.

Deleting file tabs

To delete a File tab:

♦ Right-click on the tab.

♦ Click on the **Delete** button **or...**

♦ Select a File tab.

♦ Click on the − button in Address Book's lower right corner.

Right-mouse Controls

Virtually all DeskTop Set views have context-sensitive right–mouse-button controls. Simply right–click over various sections of the screen to see the corresponding pop-up menu, with commands that function just like their counterparts in the standard Windows menus. These "shortcuts" save you time, making you more productive.

Page View

1. Right-click a toolbar to access its customization menu.

2. Right-click on subject tabs to edit tab name and presentation.

3. Right-click on the page name field to access the edit and print options for the selected record.

4. Right-click a page phone field to dial other numbers and view dialing options.

5. You can edit any file tab name by right-clicking on it.

Sample Address Book

File   Edit   View   Search   Dial   Schedule   Log   Page   Windows   Help

Acer

Party Guest List | IBM | Travel | Meg | Services | Chicago Trip | Family | Ambria
Back | Cover | Pages | List | Database | Deleted | Press Contacts | Okna Corporation

L.L. Bean	800-221-4221	**Large Customers**
La Reserve	212-247-2993	**Large Evaluations**
Landmark Research Int'l	800-683-0584	**Legal**
Lark in the Morning	707-964-5569	
Laser Cartridge Recharge	801-226-1590	
Leading Edge Computers	508-836-4800	
Lexmark International, Inc.	606-232-2000	
Library Software Review, Inc.		
Los Angeles Times		
Lotus - Jamie Smith	617-577-8515	
Lotus Development Corporation	617-577-8500	
Lotus Magazine		
Lyben Computer Systems	800-493-5777	
Lyndhurst Post Office	201-438-3938	

Legal Committee... (Business)
Legal Committee... (Home)

Print record   ▶

Copy
Copy template   ▶
Cut

Link...
Clone
Paste

Clear entry

My Book | Okna Corp Network Address | Sample | Senator's Book

Tue, October 29, 1996   Dear ,   4:14 PM

6. Right-click in the binder area to access all menu bar commands.

7. Right-click on an empty line to open a blank folder, or use the paste and clone commands.

1. The toolbar menu

2. The subject tab edit window
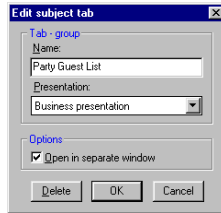
3. The entry menu

4. The page phone menu
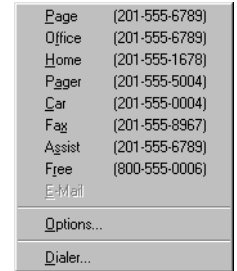
5. The file tab edit window
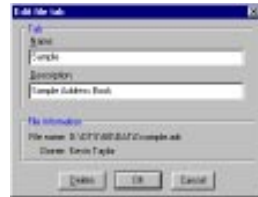
6. The binder menu
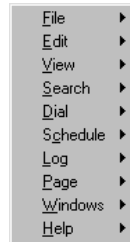
7. The blank line menu
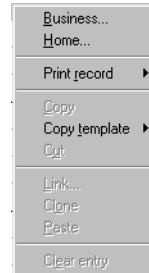
List View

1. Right-click on a column header to edit the list's options.

2. Right-click on subject tabs to edit tab name and presentation.

3. Right-click on a non-telephone field to access edit and print options for the selected record.

4. Right-click any phone number field to dial other numbers and access dialing options.
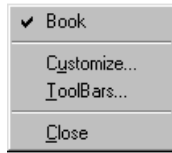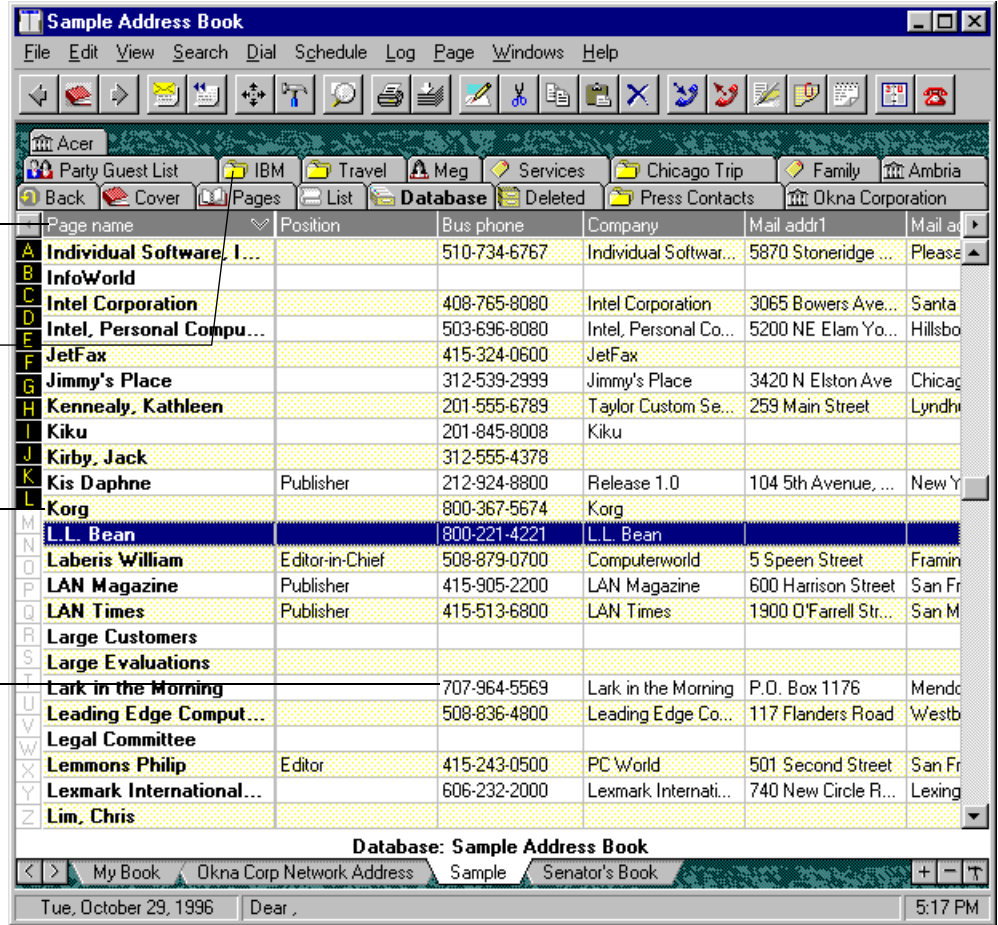
1. The column header menu
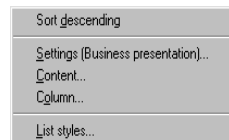
2. The subject tab edit window
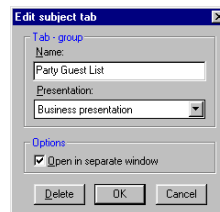
3. The entry menu
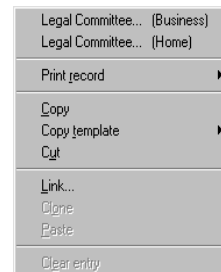
4. The page phone menu
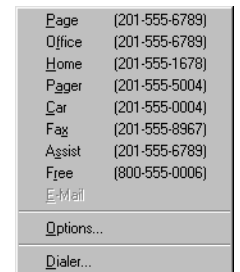
Available Address Books List

You can open any previously-used address book from a single dialog box. The *Available Address Books* window lists all network or local boo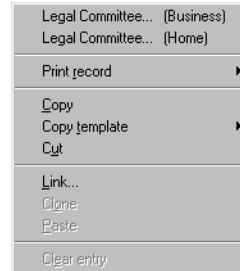ks that have been opened using the **File/Open** command. The owner name, book description, and file attributes are all shown.

To open the *Available Address Books* list:

♦ Select **View/Books** from the menu. The following dialog box appears:
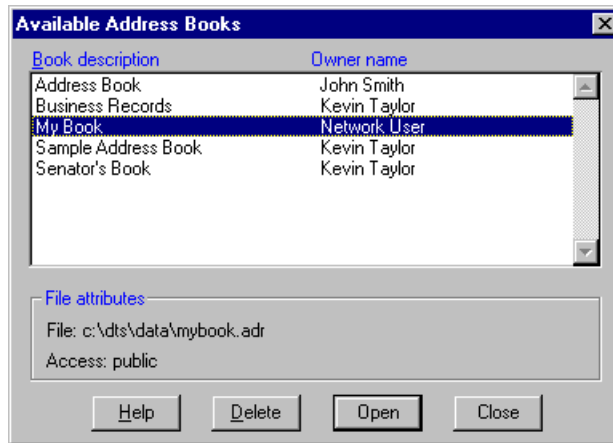
Select and open or delete any previously-used address book
from this window.

Opening books **To open a book from the list:**

♦ Select **View/Books** from the menu.

♦ Select an address book from the list.

♦ Click the **OK** button.

Adding books **To add a book to the list:**

♦ Select **File/Open**.

♦ Choose the drive and directory that contains the book you wish to add.

♦ Select the file and click the **OK** button.

Deleting books You can delete address book files from this window. Before doing this, make sure that all information you need from this address book is backed up or copied elsewhere.

To delete an address book file:

♦ Make sure the address book you want to delete is not open.

♦ Select **View/Books** from the menu.

♦ Choose the address book that you want to remove.

♦ Click the **Delete** button.

♦ Type the word `Erase` in the *Delete address book* window.

♦ Click the **OK** button.

The address book is removed from the list, and its files are deleted.

Groups

Groups provide you with an easy way to logically associate entries that you deal with often. You can make a group for your *Top ten customers* or *People to call today*. Set up the group as a subject tab or leave the Group list running minimized on your desktop. Then, whenever you need information on one of those people, you can use the group to instantly access information regarding the individuals.

You can either view groups as a list in Address Book, or open them as a separate window, allowing you to minimize Address Book and leave more room for your other Windows applications. When you want to see the information for one of your group entries, simply click on the group folder, then select a name to open the *Record* folder for that person.

You can also use *Groups* to specify a list of people to print or export.

Viewing groups Use the group list box to view and access all members of the group. You can have several groups open at one time. The *Members* list displays all the entries belonging to the selected group. You can manipulate this list just as you would any other in Address Book.

Group lists are similar to folders because they can be left open or minimized when Address Book is running.

To view a group:

♦ Select the **View/Groups**...command.

♦ Select the desired group from the list.

♦ Click the **Open** button.

The *Group* list for the selected group appears.

Click here to select another group to view.

Double-click on a name or company in the Members list to go to its record folder.

Party Guests

Sample Address Book - Group: Party Guests

Page name	Home phone	Home addr1	Home addr2
Adams, Joey	201-555-7801	893 Centre Drive	Montvale, NJ 07645
Bradford, Nick	201-555-9932	8392 Wasco Lane	Montvale, NJ 07652
Cabbel, Jeff	201-555-9872	349 Park Place	Montvale, NJ 07652
Carlisle, Martin	201-555-1913	420 Old Homeste...	Montvale, NJ 07652
Castlebury, Danny	201-555-9392	3829 Falcon Nest...	Montvale, NJ 07652
D'Angelo, Dean	201-555-9372	162 Mack Road	Montvale, NJ 07645
Gore, Paul	201-555-7801	825 Montgomery ...	Montvale, NJ 07652
Lim, Chris	201-555-4544	38 Hope Drive	Montvale, NJ 07652
Masterson, Kenny	201-555-9232	28 Skyline Ave.	Montvale, NJ 07652
Merril, Johnny	201-555-4164	816 Northern Blvd.	Montvale, NJ 07652
Montgomery, Stan	201-555-8383	582 Burr Hill Drive	Montvale, NJ 07652

Dear Joey,

Click here to set up group options.

View and edit groups from this window.

Adding members to a group

To drag and drop members to a group:

♦ Open the group that you wish to add records to.

♦ Position the group off to one side of Address Book so that you can clearly see both windows.

♦ Click on an address book entry and hold down the left mouse button. The cursor changes shape.

♦ Drag the cursor to the *Members* section of the *Group* dialog box.

♦ Release the mouse button. The entry is added to the group.

To add members to a group using subject tabs:

♦ Click on an address book entry and hold down the left mouse button. The cursor changes shape.

♦ Drag the cursor to the group's tab.

♦ Release the mouse button. The entry is added to the group.

Removing entries from a group

To remove entries from a Group

♦ Open the group.

♦ Highlight the record that you wish to remove.

♦ Click on the ✂ button on the toolbar. The entry is removed from the group, but remains in your address book.

Viewing group members

To view a group member:

♦ Select a name from the member list.

♦ Press the **Enter** key to open the entry's folder.

Creating Groups

To create a new group:

♦ Choose the **View/Groups…** command. The *Open group* dialog box appears.

♦ Click the **New** button. The *Group Options* dialog box appears.

♦ Enter a name for the group.

♦ If desired, type some notes.

♦ Click the **OK** button to create the new group.

Option	Description
Group name	Specifies the name of the current group. If you are creating a new group, this field is initially labeled *Untitled group*.
Notes	Displays brief notes about the group.
Records	Specifies the number of entries assigned to the group.
Modified	Shows when the group was edited. If the selected group is new, this area is blank.

Modifying Groups

To modify an existing group:

♦ Open the group you would like to modify.

♦ Chose **File/Setup** from the Menu Bar. The *Group Options* dialog box appears.

♦ Make the desired changes.

♦ Click **OK** to save the changes, or **Cancel** to exit without saving.

Deleting Groups

To delete a group:

♦ Select **View/Groups**. The *Open Group* dialog box appears.

♦ Select the Group that you wish to remove.

♦ Click the **Delete** button. Address Book asks you to confirm your desire to delete the selected group. The entries previously assigned to the Group will not be deleted from your address book.

Categories

Categories provide you with another means of organizing your entries. You can assign any combination of 128 customizable categories to your Address Book records. All people assigned to a certain category can be listed together on screen, or printed. The unique aspect of categories is that they can be included like any other piece of phone or address book information when you make printouts.

Viewing Categories

You can open a category by using the categories list or a subject tab.

Categories list **To view a Category using the Categories list.**

♦ Select the **View/Categories**... command.

♦ Double-click on the category that you wish to view.

Double-click on the category you want to view.

The category is listed similarly to groups.
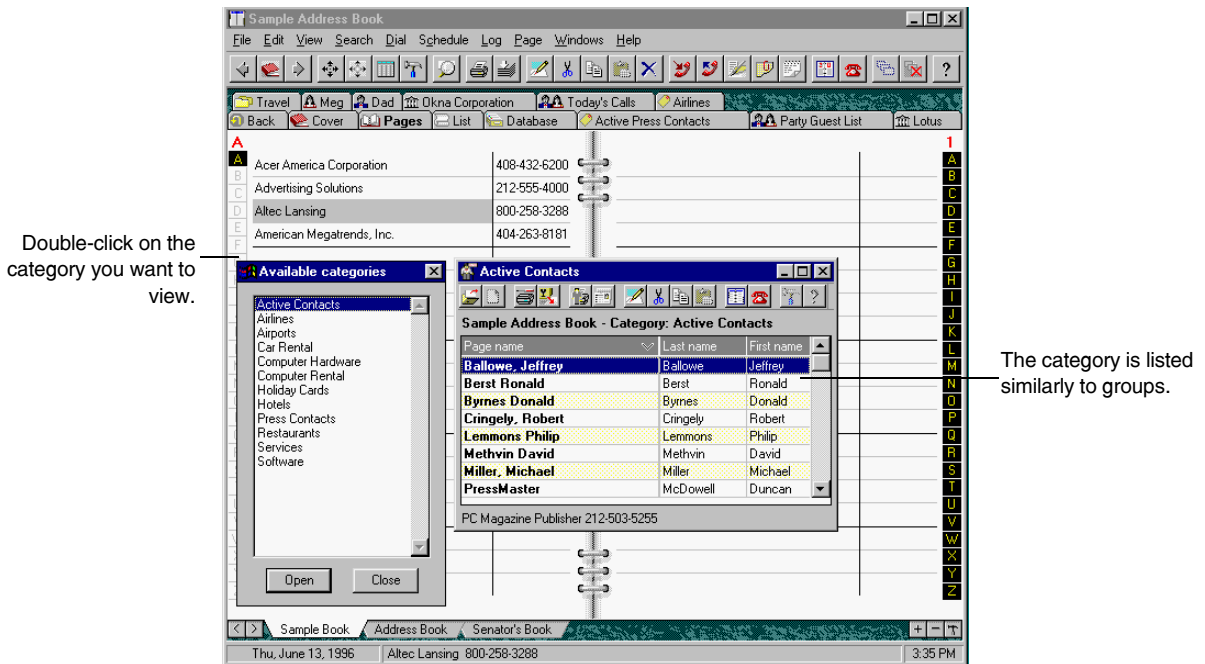
You can open one or more category listings, and use them side by side with Address Book.

Subject tabs **To create a subject tab for a category:**

♦ Choose **View/Categories** from the Address Book menu.

♦ Highlight the Category name.

♦ Drag-and-drop this category into the Subject Tab area at the top of your Address Book. A new tab will appear with the Category's name on it.

♦ Click on the category's subject tab to view a list of its members.

Creating a Category

Each of your address books can have a maximum of 128 categories. Any single person can belong to any combination of categories.

To create a category:

♦ Choose **File/Setup** from the Address Book menu.

♦ Click the Categories tab. The list of categories appears:

All 128 categories appear in this list. Click any category to set it options.

Type the name of the category here.

Click here to clear the selected category.

You can also copy the list of categories from another address book.
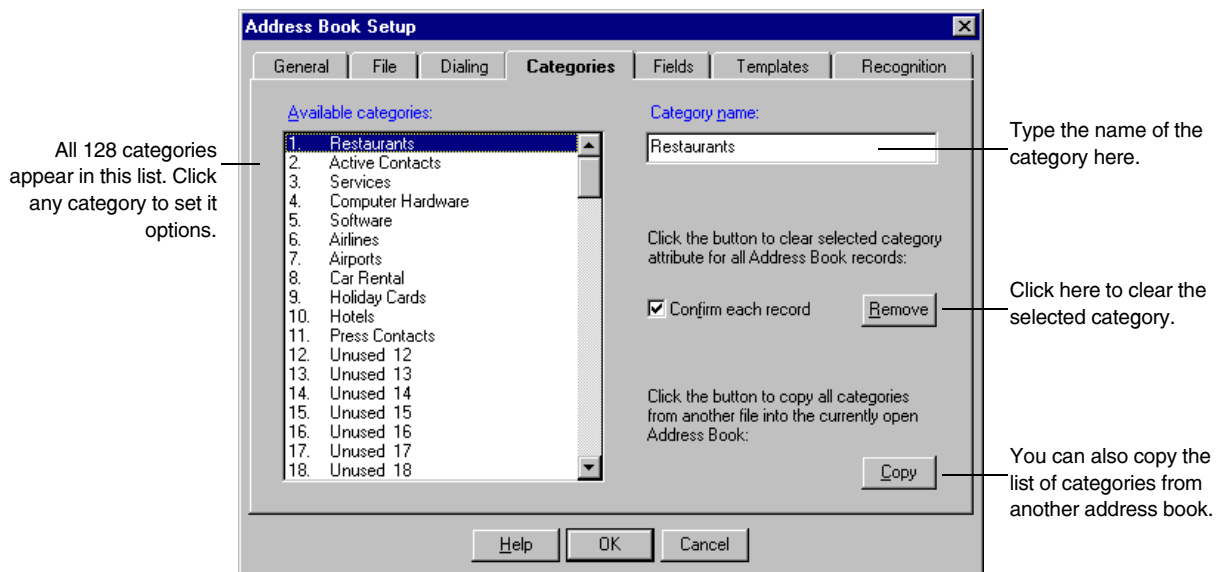
You can create a new category, or rename an existing one. You can also clear a category of its members, or copy categories from another book.

♦ Click an *Unused* category in the list on the left.

♦ Type a new name for the category.

♦ Click **OK** to save the new category.

Adding people to a category

You can add an address book entry to a category using subject tabs, or using the entry's address book Folder.

Using subject tabs

If you create a subject tab for your Category, you can add people to the category by dragging-and-dropping. This is the simplest way to build categories.

To drag-and-drop to a category:

♦ Create a Subject Tab for your Category (see "Subject tabs" on page 79).

♦ Click the person you wish to add to this category.

♦ Drag-and-drop the person onto the Category's subject tab (if you do not see an animated character jump into the Category's tab, see "Components and options" on page 136).

Using the Address Book Folder

You can also assign a person to a Category via their Folder:

♦ Double-click the person's name to open their Address Book Folder.

♦ Click the **Record** tab at the top of the Folder. Click the **Category** filter tab:

The available Categories appear here. Double-click to move any one to the *Assigned* list.

These are the categories this particular person is a member of.
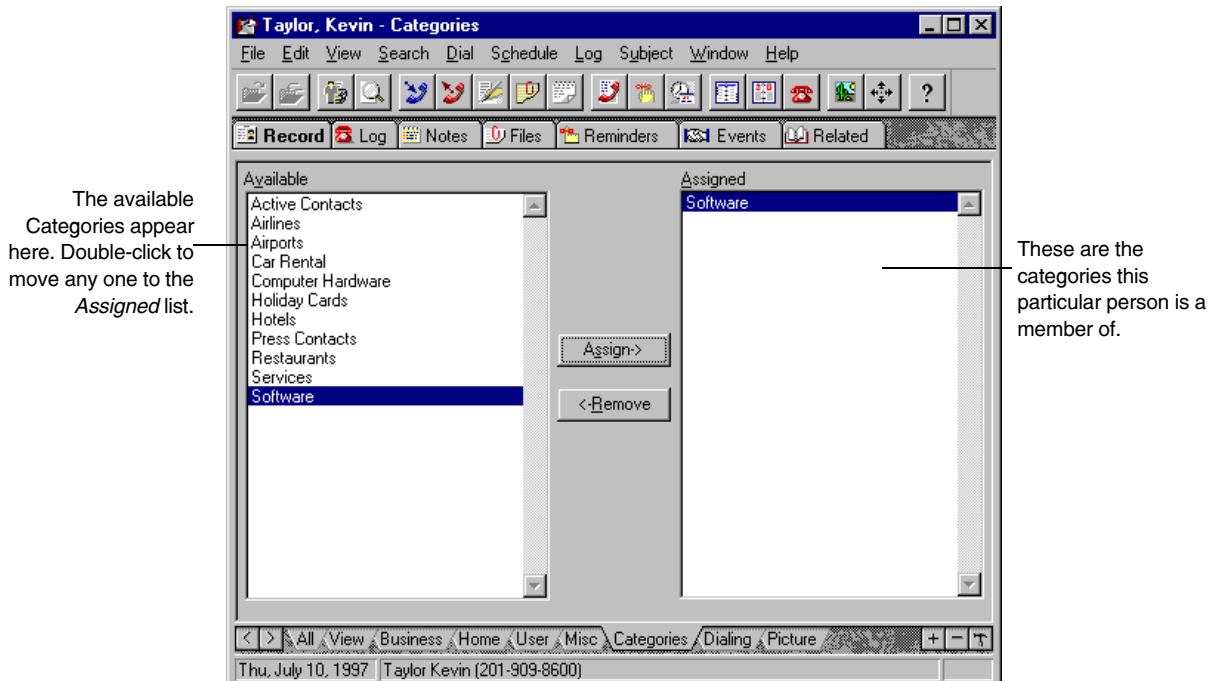
The Categories tab lets you assign this person to one or more Categories.

♦ Double-click any Category name in the list on the left to assign this person to that Category. The category will be listed under *Assigned*, on the right.

♦ Close the Folder (or switch to another tab) to save your changes.

Topics

Topics provide a useful way to group together related names in ways that you may not otherwise think of independently. For example, say you have the names of several mail-order companies in your book. If you list them all as *Mail Order*, you never know which company is which. Instead, you can put them on a **Mail Order** topic page to list them together. Now when you call around for the lowest price, you'll have all the names and numbers in one place.

Also, if you are planning a trip or vacation, you may not remember the names of individual travel agencies, airlines, or car rental agencies. You will remember that they are all related to travel, so you can create a **Travel** topic page specifically to list all those services. Instead of remembering your travel agency is named *Phil's Travel and Tours*, you just have to open your **Travel** topic.

You can have as many topic pages as you need, and you can put a topic page inside a topic page. Topic names appear in a bold font on the page. When a topic page is open, its name appears at the bottom of the page.
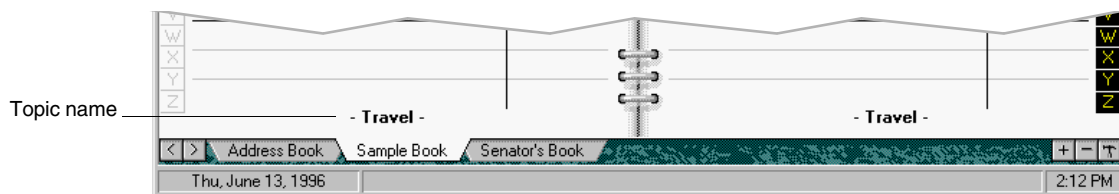
A Topic Page lets you organize related records in one place. You can use them to list employees for a company, all computer resellers in your area, or friends from a country club.

The sample address book has a topic page for Kevin's frequent trips to Chicago. The **Chicago Trip** topic page keeps all his Chicago information together: travel services, the publishing house he visits (PressMaster Inc.), a friend's name who lives in Chicago (Jack Kirby), popular restaurants, and more. Try opening the **Chicago Trip** topic page.

Creating a topic

To create a topic page:

♦ Select an existing entry, or create a new one.

♦ Select the **Page/Add topic** command. The new topic page is created and opened. The topic name appears at the page's bottom.

Creating topic tabs

To set up a subject tab for a topic page:

♦ Select **View/Topics…** command, **or…**

♦ Find the topic in page view.

♦ Left-click and hold on the topic page name. The mouse cursor changes shape.

♦ Drag the cursor to the area between the toolbar and the entry listing.

♦ Release the mouse button. A tab is created for the topic page.

Viewing topics

To view a topic using the *Available topics* list:

♦ Select the **View/Topics**… command. The *Available topics* list opens.

♦ Double-click on the name of the topic that you want to open.

To open a topic using a subject tab:

♦ Click on the topic's subject tab.

Click a topic page subject tab to open that topic.
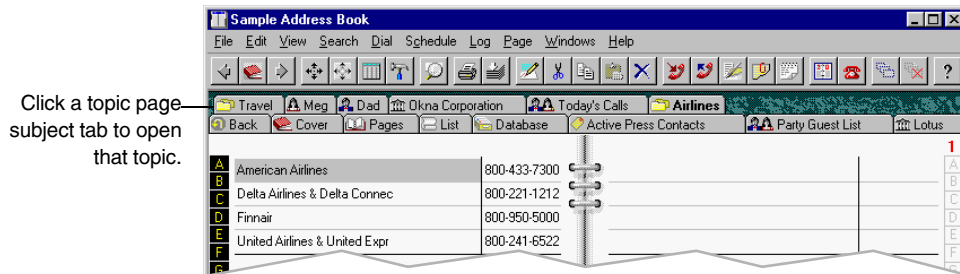
To open a topic from an Address book page:

♦ Double-click on the topic page name.

Double-click on the topic page name to open the topic.
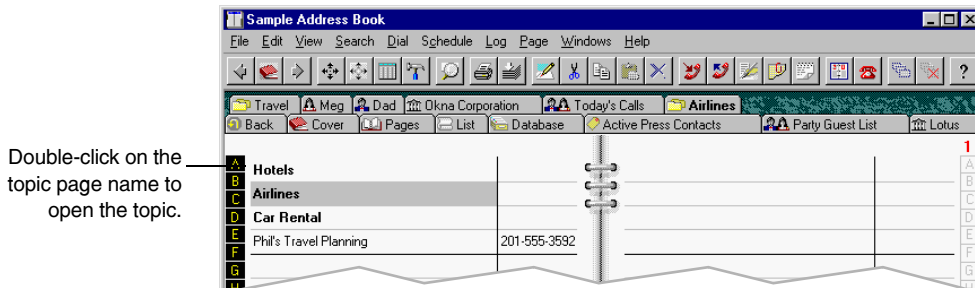
Deleting topic pages

To delete a topic page:

♦ Open the topic that you wish to delete.

♦ Make sure that you copy or move all names you wish to save to another location in your address book.

♦ Select the **Page/Delete topic** command.

♦ Click the **OK** button.

Note: When you delete a topic page, its entries are permanently removed from your Address Book. If you wish to retain these entries, use the **Page/Gather** window's **Move** command to place the entries on a different page.

Searching your Books

Address Book has several different search formats, so you can always find the information you need.

To open one of the Search windows:

♦ Select **Search/[Search type]**... command (ex. **Search/Exact**). The corresponding search dialog box opens.

Select the type of search from these tabs.

Choose which field or piece of information to search.

Found entries appear here.

Type the information you are looking for.
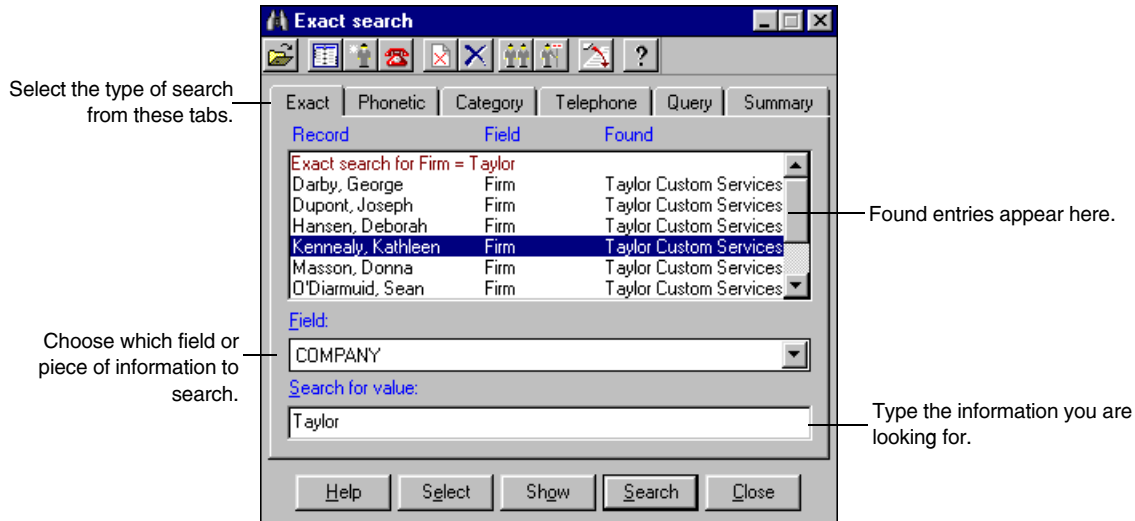
You can find exact or "sound-alike" text, entries in a category, phone numbers, or do complex logical searches.

Option	Description
Exact search	Finds all records with a certain name, zip code, phone number, and more. It looks for the *exact* text you give it. for example, if you look for the last name `Jones`, it finds *Jill Jones*, but not *Steven Johns*.
Phonetic search	This is similar to Exact search, but you do not have to remember exactly how to spell a name. It finds all entries (individual or company) that sound similar to the word you type. For example, if you search for the company name `Okno`, it finds *Okna Corporation*.
Category search	Finds all names that belong to a certain category. This is especially useful when you want to assign the members of one category to another category or a group.

Telephone	This is like exact search, except it finds only telephone numbers. If you tell it to look for just an area code (212) or an area code and exchange (212-555-), it lists all phone numbers that begin with those digits.
Query search	This is the most comprehensive and flexible of the search tools. It allows you to search for combinations of text and fields. The next section describes this in great detail.
Summary	This is not a Search format. It shows the results of the most recent search in an expanded window.

Query Search

You can perform complex search queries on an address book database.

To open the Query dialog box:

♦ Select **Search/Query...** from the menu.

♦ The *Search* dialog box appears:.

All available queries are listed here.

This button creates a new query.

Click here to change the selected query.

This button deletes the selected query.
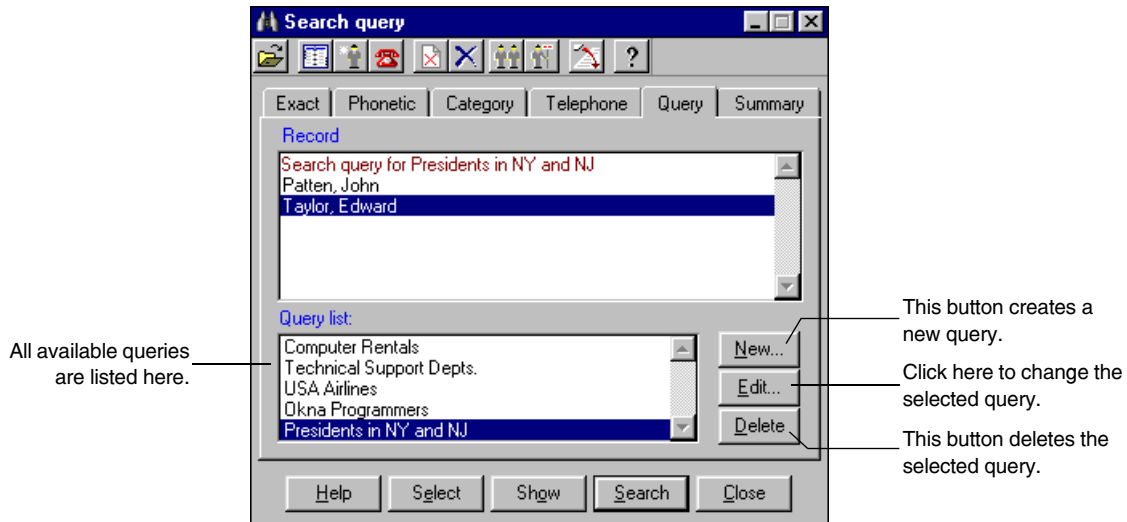
Select a pre-configured query from this window and see its search results.

Option	Description
Record	Search results are displayed in this box.
Query list	If you do a particular search frequently, you can save it under a Query name.

Button functions

Command	Description
New	Opens the *Search Query* dialog box and creates a new query
Edit	Opens the *Search Query* dialog box and allows you to edit the selected query
Delete	Deletes the selected query.
Show	When a name is selected, clicking this button opens the corresponding folder.
Select	When a name is highlighted, clicking this button opens the address book page containing that record and highlights the page name.
Search	Starts the highlighted query.

Setting Up a Query

To create a new query:

♦ Click the **New** button. The *Search query* window appears.

♦ Enter the *Query name*.

♦ Add *Fields* to search

♦ Select *Operators*.

♦ Enter *Search for* information.

♦ Click on **Save** to keep the changes.

Select the field (Last Name, Company, Fax, etc.) that you want to search.

Choose the field operator (contains, exactly matches, etc.) here.

Choose the Boolean operator (AND, OR) here.

When this is selected, Query search looks for words that are capitalized just like the word you typed.

When this is selected, Query search looks for words that are similar to the one you typed. For example, if you typed `Okno`, it would find *Okna*.

Type the text you want to look for in this column.

Use this dialog box to set up a query.

Query Name   The description for the selected query. If you are creating a new query, this initially reads *Untitled*.

Case Sensitive   If you need to make a case sensitive comparison, select this check box. This means "OKNA" is **not** equal to "Okna." Be aware that the *Case Sensitive* check box affects all query areas, so the whole list of conditions is checked for case sensitivity.

Phonetic   Selecting this check box may be useful when you don't remember the spelling of a person's last name, for example. In this case, the *Phonetic* check box searches in a "sounds like" manner, not by a "character-to-character" comparison. The *Phonetic* check box affects the whole list of conditions. When selected, it affects the following operations:

✦ equal to

✦ not equal to

✦ less or equal (in "equal" part of operation)

✦ greater or equal (in "equal" part of operation)

✦ contains

✦ exactly equal

Field   This condition specifies which record field is searched.

Operator   The search's logical operator can be any one of these types:

Operator	Description
Equal to	Checks if the specified field *begins with* a given string. For example, "Jo" is **equal to** "John," but "IBM Corp." is not **equal to** "IBM." Don't forget that **equal to** means *begins with*, so found items may contain additional text after the initial match. If you need to check for exact equality (with no additional text), use the operation *Exactly equal*.
Not equal to	Has the opposite effect of **equal to**.
Less than, or Greater than	These operations compare two strings in "character by character" mode. The result is that "John" is **greater than** "Green" and "OKNA" is **less than** "Okna". The latter is true because capital letter is **less than** appropriate lowercase letter, so "K" is **less than** "k".
Less or Equal to/ Greater or Equal to	These are combinations of the operations defined above.
Is blank	Checks if the field is empty or contains only blank (space) characters.

Is not blank	Has the opposite effect of **is blank**.	
Contains	Checks if the field contains the testing string as a substring. For instance, "All that jazz!" contains "jazz", and "Ella Fitzgerald" contains "ger". It can be very useful when you do not know the exact sequence of words in the desired string.	

Search for　Type the text to search for here.

Condition　It is possible to build more complex queries by linking several conditions with AND/OR operators. For example, the query:

Condition	Field	Operator	Search for
	COMPANY	EQUAL TO	IBM
AND	FIRST NAME	EQUAL TO	John

finds all Johns at IBM.

If there are more than two conditions linked with AND/OR, all conditions are evaluated from left to right without any precedence. That is,

`c1 OR c2 AND c3 OR c4` is equivalent to:

`((c1 OR c2) AND c3) OR c4`

When some precedence of operations is needed you can use one level of parentheses, such as:

`c1 AND (c2 OR c3) AND (c4 OR c5)`

To use a parenthesis, choose the appropriate value from the Condition list box. Parentheses are used in logical searches the same way they are used in mathematical equations.

To remove a condition from the search:

♦ Place the cursor on the line of the condition you want to remove.

♦ Click on the **Clear line** button.

To rename a query:

♦ Select the query from the *Search Query* window's *Query list*.

♦ Click the **Edit...** button.

♦ Type a new name under *Query name*.

♦ Click the **Save** button.

To begin a search:

♦ Select a query from the *Query list*.

♦ Click the **Search** button.

To delete a query:

♦ Select the query from the *Query list*.

♦ Click the **Delete** button.

Viewing Records

Once the Query search has found a list of entries, you can make Address Book jump to any selected entry in the list.

To go to a selected record in Address book:

♦ Highlight the record that you want to view.

♦ Click the **Select** button.

To open an entry's folder.

♦ Highlight the record that you want to view.

♦ Click the **Show** button.

Assigning Results to Groups and Categories

Sometimes you may need to save the results of a query to a group or category. You can then view or print these records at a later time.

To put the found entries in a group:

♦ Click the toolbar's 👫 button.

♦ Select an existing group from the list, **or...**

♦ If you want to create a new group, type its name in the *Group name* field.

♦ Click the **OK** button.

To assign one or more categories to found records:

♦ Click the toolbar's 👤 button.

♦ Highlight the appropriate categories

♦ Click the **OK** button.

File Utilities

Address Book has several utilities that help you manage your Address Book entries and transfer information between other applications and your Address Book. These are described here.

For information on the Backup utility, or on Import Wizard, please see the appropriate chapters of this manual.

Exporting Information

Address Book can export its information to tab or comma-delimited formats. The export utility is flexible, allowing you to export just the information you choose for the records you specify.

Creating Export Range Profiles

Export Range Profiles allow you to define exactly which records are included in an export. You can define and save as many of these profiles as you like.

To create a new export range profile:

♦ Select the **File/Utilities/Export...** command.

♦ Click on the *Ranges* tab:

Highlight all the groups, categories, and topics you want to export, or don't select any of them to export all records.

Select from a list of available range profiles here.

Choose the field you want to sort the export file.
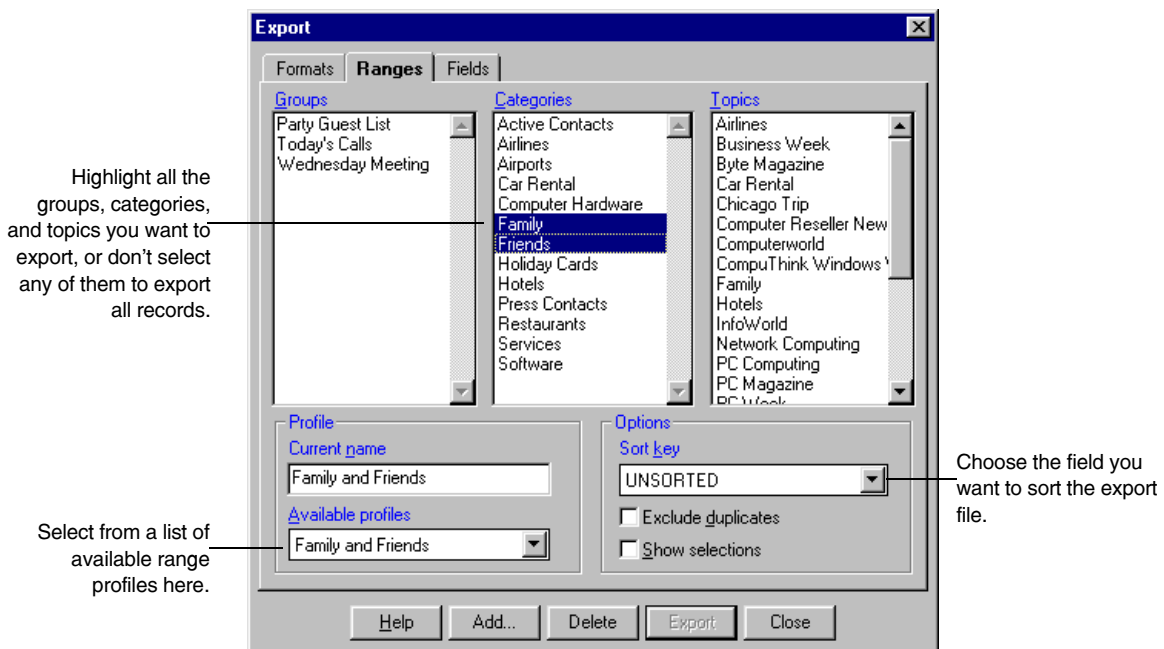
♦ Click the **Add** button. The *Add New Profile* dialog box opens (if no previous range profiles have been added, the *Add New Profile* dialog box opens automatically).

♦ Enter the new profile name.

♦ Click the **Add** button.

♦ From the *Groups*, *Categories* and/or *Topics* lists, select which records you wish to export. You can combine *Group*, *Category* and *Topic* selections to create a range profile. The list boxes allow multiple selections, so you can choose as many items as you wish. Records that belong to any one of your selections will be exported.

♦ Select a *Sort key* from the combo-box. The sort key is used to alphabetize the export file.

♦ Click the **Close** button or select another tab to save the profile.

Exclude duplicates   Prevents records which fit into more than one of your range selections from being exported more than once.

Show selections   Removes all unselected *Groups*, *Categories* and *Topics* from their respective lists. The lists displays only those items you have selected. You will not be able to modify the profile until the *Show selections* check box is unchecked. This can be used as a safeguard.

Editing Existing Range Profiles

To edit an existing range profile:

♦ Select the **File/Utilities/Export...** command.

♦ Click on the *Ranges* tab.

♦ Select the profile you wish to edit from the *Available profiles* combo-box.

♦ Modify the range selections as desired (remember, the *Show selections* option should *not* be checked).

♦ Modify the profile name, sort key and duplicates options as desired.

♦ Select another tab or click the **Close** button to save your changes.

Deleting Range Profiles

To delete an existing range profile:

♦ Select the **File/Utilities/Export...** command.

♦ Click on the *Ranges* tab.

♦ Select the profile from the *Available profiles* combo-box.

♦ Click the **Delete** button.

Creating Export Field Profiles

Export field profiles provide a way for you to specify exactly which of Address Book's information fields are exported. You can create any number of these profiles and use them to export information for various purposes.

To create an export field profile:

♦ Select the **File/Utilities/Export...** command.

♦ Click on the *Fields* tab.

♦ Click the **Add** button on the bottom of the dialog box. (The program does this automatically the first time you open the window).

♦ Enter the new profile name at the prompt.

♦ Click the **OK** button.

♦ Select any of the *Available fields* by double-clicking on them. They are added to the field profile.

♦ Enter any *User Comments* about the profile (optional).

♦ Select another tab or click the **Close** button to close the dialog box and save the profile.

Available Address Book fields are listed here.

These are the fields that will be exported.

The field profile name appears here.

Select different profiles from this drop-down list.

You can write brief notes to describe each profile.
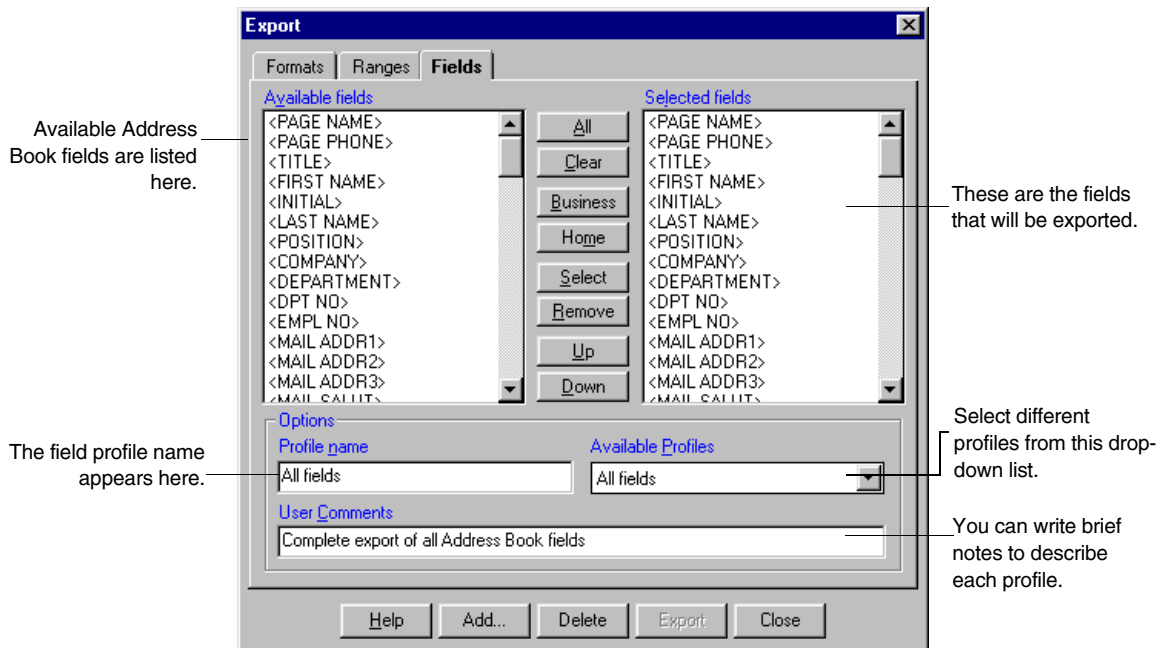
Select which information is exported for each record.

Button functions

Command	Description
All	Includes all available fields in the profile.
Clear	Removes all fields from the *Selected fields* list.
Business	Replaces the current list of *Selected fields* with the fields from the *Business* copy template.
Home	Replaces the current list of *Selected fields* with the fields from the *Residence* copy template.
Select	Includes the highlighted *Available field* in the profile.
Remove	Removes the highlighted *Selected field* from the profile.
Up	Moves the highlighted *Selected field* up one position in the list.
Down	Moves the highlighted *Selected field* down one position in the list.

Editing Existing Fields Profiles

To edit an existing field profile:
♦ Select the **File/Utilities/Export...** command
♦ Click on the *Fields* tab.
♦ Select the profile from the *Available Profiles* combo-box.
♦ Make changes to the fields profile.
♦ Select another tab or click the **Close** button to save the changes.

Deleting Field Profiles

To delete a field profile:
♦ Select the **File/Utilities/Export...** command
♦ Click on the *Fields* tab.
♦ Select the profile from the *Available profiles* combo-box.
♦ Click the **Delete** button to remove the profile.

Exporting the Information

Once you have defined your field and range profiles, you can export Address Book data. By choosing the proper range and field profiles, you can control exactly which records and information fields are exported.

To export your Address Book information:
♦ Select the **File/Utilities/Export...** command.
♦ Click on the *Format*s tab.

♦ From the *Range* list, select one of the range profiles.

♦ From the *Fields* list, select one of the field profiles.

♦ Select an export file format from the combo-box.

♦ Edit the file name appearing in the *Export file* field, if necessary. By default, the export file is written to your DeskTop Set data subdirectory (\DTS\DATA).

♦ Click the **Export** button.

Select the range of records to export from this list.

Select the field profile to use from here.

This is the name of the exported file. You may change this either by typing or clicking the button to the right.

Select the file format from this drop-down list.
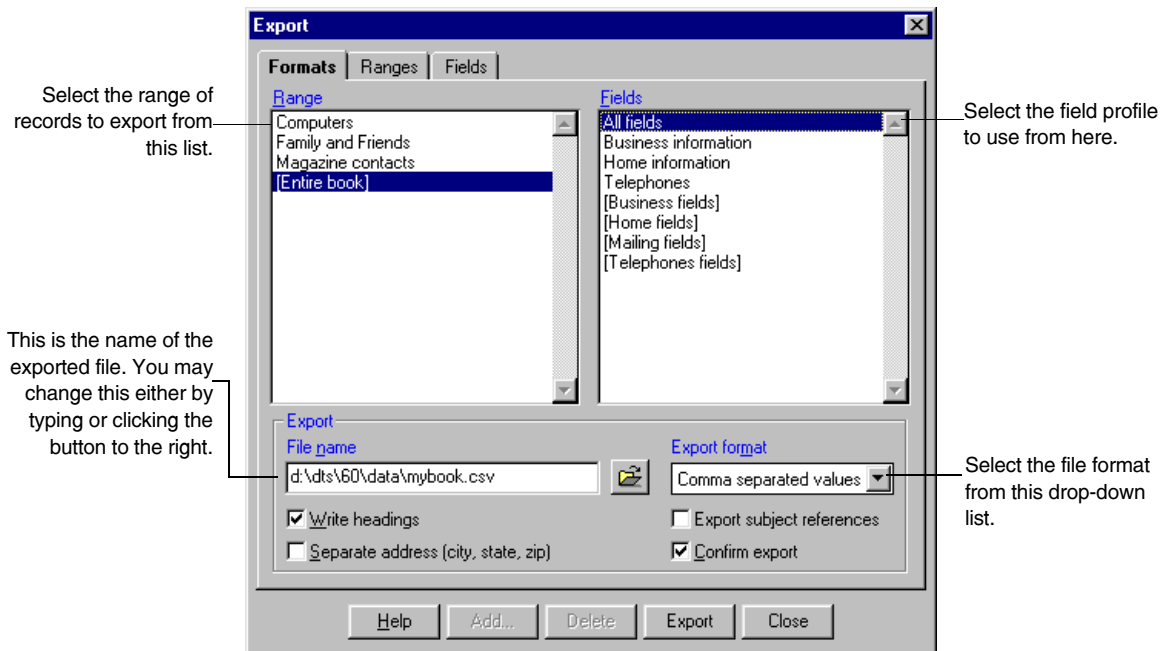
The Export File dialog box is where you select options for each export.

Option	Description
Confirm export	Lets you view the list of export records before they are written to the file. You have the option of removing any records from the export.
Write headings	Creates and exports a record which contains the headings of all the fields you are exporting (for example, "Page Name, Page Phone, Zip Code"). This can be very useful when you use the exported data into some other application.
Separate address	Splits the address into separate city, state, and zip code fields, a common format in other programs.

Exporting Lists

You can export the list you are viewing at any time.

To export a list:

♦ If you are not already in list view, click the *List* tab.

♦ Select **File/Utilities/Export list…** from the menu.

♦ Configure the export options in the *File* and *Fields* tabs.

♦ Click the **Export** button.

File Tab The first thing you must do is select a file name, format, and how the file is to be alphabetized.

This is the name of the export file. ────────

Select which field is used to alphabetize the export file. ────────

These are the fields that will be exported. You can change them in the *Fields* tab.
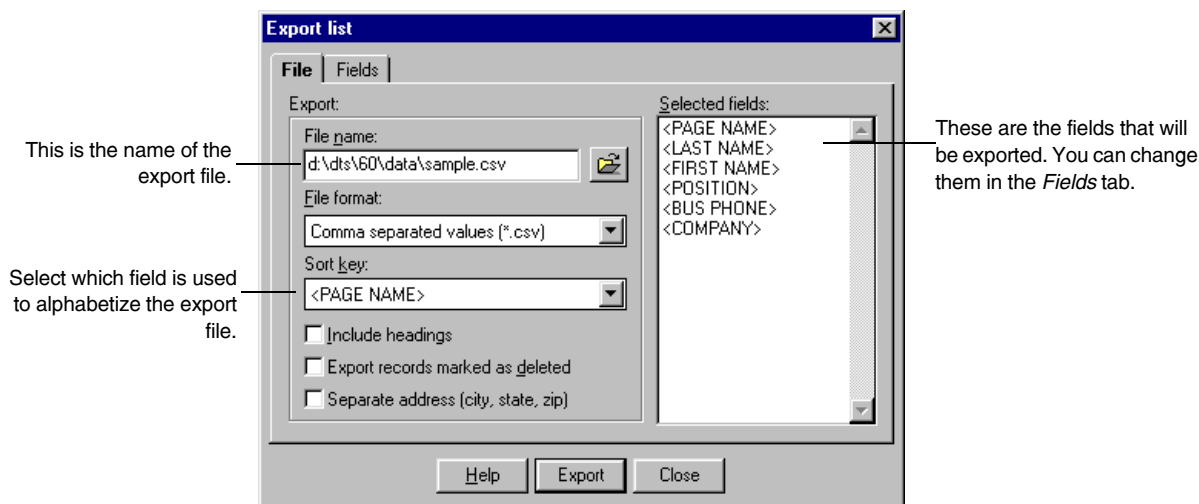
This dialog box determines the exported file's format.

Option	Description
File name	Specifies the directory and name of the export file. Click the ⬜ button to change this.
File format	There are two available ASCII file formats: tab and comma delimited. For a full explanation of these formats, see "Merging Files" on page 97.
Sort Key	This is the field that sorts, or alphabetizes, the export file.
Include headings	Check here if you want to include column headings in the export file. This is useful if you plan to import or open the file in another application.

| Export records marked as deleted | When you clear a record, Address Book doesn't delete it right away. Instead, it marks the record as one that should not be displayed and can be overwritten. If you accidentally delete a record, using this feature may allow you to recover the information. |
| Selected fields | Shows a list of fields to be exported. This can be modified from the *Fields* tab. |

Fields Tab   This lets you select which record fields will be exported, and in which order. This window is similar to its Address Book export counterpart (see "Creating Export Field Profiles" on page 92).
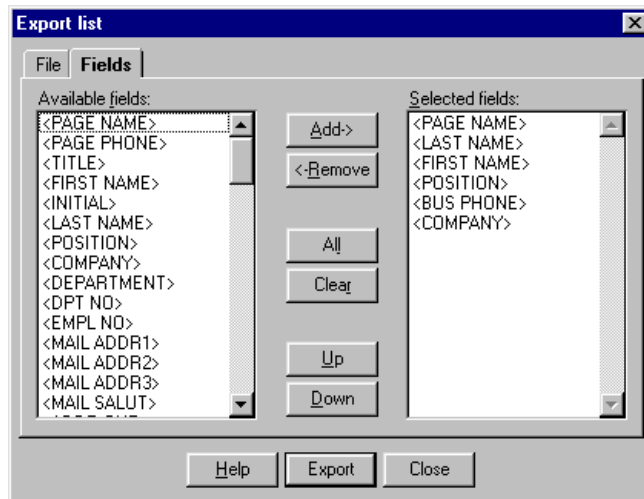
Select which fields will be exported.

Button	Description
Add	Includes the highlighted *Available field* in the export.
Remove	Removes the highlighted *Selected field* from the export.
All	Includes all *Available fields* in the export.
Clear	Removes all *Selected fields* from the export. This allows you to start from scratch.
Up	Moves the highlighted *Selected field* up one position in the list.
Down	Moves the highlighted *Selected field* down one position in the list.
Export	Starts the export operation for the selected list.

Merging Files

The file merge utility allows you to combine the entire contents of two address books.

To merge the contents of two Address Books:

♦ Open the destination book. This is the address book you want to merge names into.

Select the **File/Utilities/Merge file…** command:.

The name of the Address Book file you are merging appears here.

Click here if you just want to preserve your Page name and Page phone information.

Click here to select the file to merge.

Click here to just merge database information. Page names and Page phones are determined by Address Book.

Click here to begin the merge process.
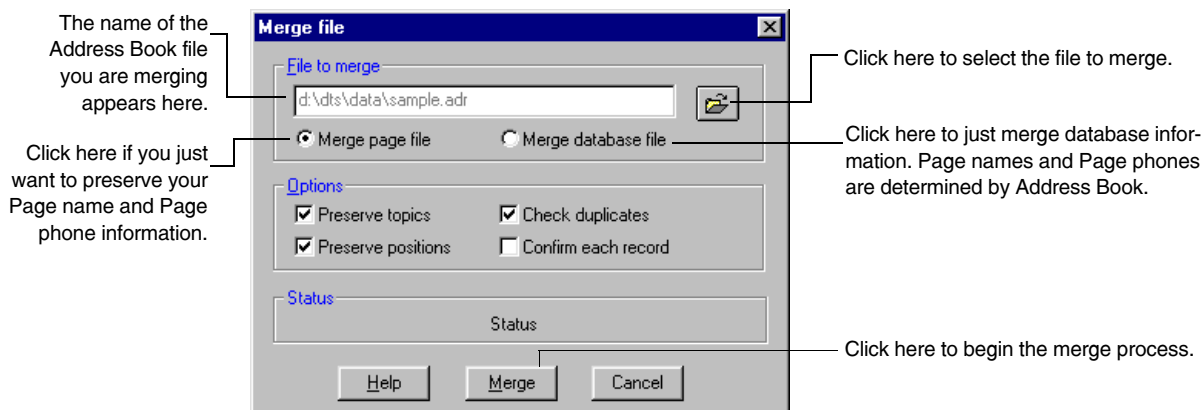
You can combine information from two address books.

♦ Click the 🗁 button. Highlight the file you wish to merge and click **OK**.

♦ If you want to merge all information, click *Merge page file*. If you want Address Book to reconstruct Page names and Page phones based on record information, click *Merge database file*.

♦ Check any other options you wish.

♦ Click the **Merge** button to start the merge.

File to merge	Option	Description
	Filename	Displays the name of the Address Book file that will be merged with the current book. Click the 🗁 button to open the *Select File* dialog box so that you can choose a file.
		Address Book files are found in your data directory (usually C:\DTS\DATA). Page files have an extension of ADR (e.g., WHITE.ADR, YELLOW.ADR). Database files have an extension of BTR (e.g., WHITE.BTR, YELLOW.BTR).

Merge page file	Executes the merge using a page file. This is the best way to merge files, as all information is copied verbatim from the merge book into the current book.
Merge database file	Select this option only if you feel that the page file for the book you wish to merge is corrupted. This type of merge is not ideal, as the page names are reconstructed from the database rather than copied as–is.

Options Use these options to set parameters for the merge procedure.

Option	Description
Preserve topics	Select this option to retain your topic page settings from the book that you are trying to merge.
Preserve positions	Select this option to keep the records on the same page and order they appear in the original book. This prevents them from being sorted automatically.
Check duplicates	Displays a prompt during the merge if a record in the merge file matches a record already in the current Address Book. This does not check for exact duplicates. It flags anything with the same phone number, address, or name.
Confirm each record	If this box is checked, you get a prompt for each record before it is merged into the current Address Book.

The *Status* field displays the records as they are merged. When it is completed, Address Book will return to the page you were last on. The current Address Book, or destination file, contains any new records that were merged. The source file itself remains unchanged.

File Doctor

In the unfortunate event that one of your Address Books becomes corrupted (due to disk errors, system crashes, or other reasons), the File Doctor utility can help. This utility scans the current Address Book's files for common problems and fixes them.

To launch the File doctor utility:

♦ Select the **File/Utilities/File doctor...** command. The *File Doctor* dialog box appears:

Check the actions you would like File Doctor to perform.

This option clears out deleted records and cleans up your database. On slower computers, it can take 2-3 seconds per entry.
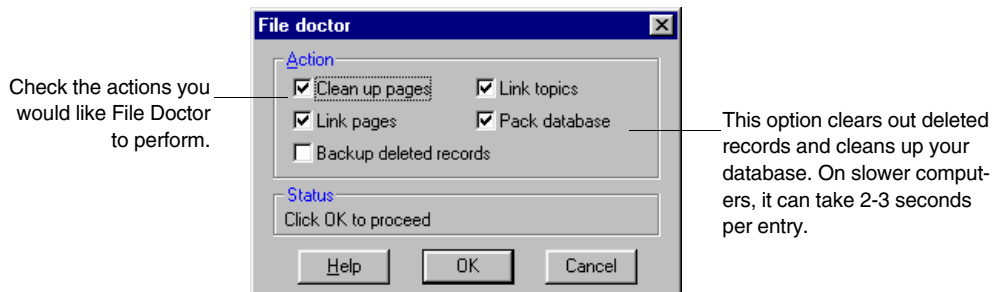
File Doctor keeps your Address Book files in good condition.

♦ Check the actions you would like File Doctor to perform.

♦ Click the **OK** button to proceed.

♦ When the process is complete, you are given the names of backup files that were created.

Option	Description
Clean up pages	Checks Address Book pages for non–alphanumeric text, "garbage" characters, and other page corruption.
Link pages	Attempts to re-link any Address Book pages that are not connected correctly. Symptoms of corrupt page linkage include: incorrect page sequence, pages that do not turn, and errors or crashes during page turning.
Link topics	Attempts to re-link any topic pages that are not connected correctly. The symptoms are similar to those of corrupt page linkage.

Pack database	Rewrites the database. If *Back up deleted records* is not selected, this also, discards any records that are marked for deletion. It may also help to solve problems with a corrupt database file. If you add and delete many records from your Address Book, you may want to pack the database periodically to keep the file size from becoming unnecessarily bloated.
Back up deleted records	Prevents File Doctor from discarding records which are marked for deletion.

Under Windows 3.1, packing the database can take up to four seconds per record. Under Windows for Workgroups 3.11 or Windows 95, which implement 32-bit file access, packing the entire database can take as little as a few seconds. (Windows for Workgroups 3.11 should not be confused with Windows 3.11. Windows 3.11 is an interim release of Windows and does not include 32-bit File Access.)

Printing with Address Book

With Address Book's built-in templates for all popular sizes of cards, envelopes, and labels, printing can be as straightforward as selecting a style and clicking **Print**. If you have specific needs, you can create your own templates, taking advantage of unique printer capabilities, such as color, different paper sizes, and capacities. This section shows you how to customize your printouts.

Printing a Record

You can print a single entry in a format similar to the folder's *View* tab. When you need to give information to someone else, you can print a record to have the address, phone numbers, and some brief notes. You can take a record printout with you when you leave the office to meet with someone. Directions in *Business Notes* for the record printout can be helpful if you are unfamiliar with an area.   A record printout is also useful for sharing record information with friends or associates.

Before you can begin, you must select a printer and print layout. You only have to do this once.

To set up record printing:

♦ Select **File/Print record/Setup...** from the menu. The *Page setup* window appears.

Choose your printer here.

Select which paper tray to use.

Change page margins here.

Select the font style and appearance options.
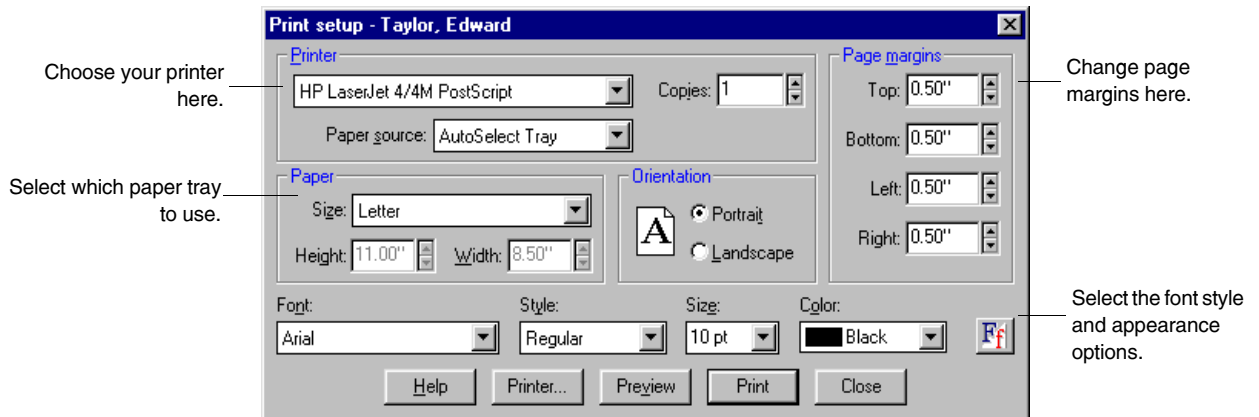
Here you can choose record printout appearance and prepare Address Book to use your printer.

Option	Description
Printer	Choose an available printer and paper source.
Orientation	Select a radio button for Portrait or Landscape printing.
Margins	Set your page margins.
Font	Choose a font type and size.

To print the record:

♦ Select a record in Address Book.

♦ Select **File/Print Record/[*Record name*]**.

Setting Up Books, Cards & Labels, and Envelopes

With Address Book, you can print an entry listing in any order, format, or size you need. If you travel a lot, you may want to print a book to keep in your briefcase. You also might keep a listing by a telephone.

You may also print envelopes, sheets of mailing labels, or Rolodex-type cards to put on a desk organizer.

Each type of print format has a nearly identical layout and setup procedure. This section describes the setup tabs and dialog boxes, and the options included in each. Any output-specific difference is noted with specific features.

Creating a New Print Style

To create a new Print style:

♦ Select **File/Print book/New style... or...**

♦ Select **File/Labels/New style... or...**

♦ Select **File/Envelopes/New style...** The *New print template* window appears.

Document Type	Description
Books	Creates a new print style for Address Books
Labels and Cards	Makes a new print style for Labels and Cards
Envelopes	Produces a new print style for Envelopes

Option	Description
Add from built-in template	This creates a new document style from an existing template, similar to using a word processor template to create a document.
Add same as current	This creates a new copy of the document style highlighted in the document list. Use this to create a new document that is only slightly different from an existing one.
Add blank template	This creates a new document style with all settings blank. Use this if you want to start from scratch.

To select a template:

♦ Choose from one of the above options and click **OK**. The *Add book style* window appears.

Select the brand of paper you are using.

Choose the brand's specific style that you would like to use. A page layout preview appears to the right.

If you wish, change the name and description that is used for the document.
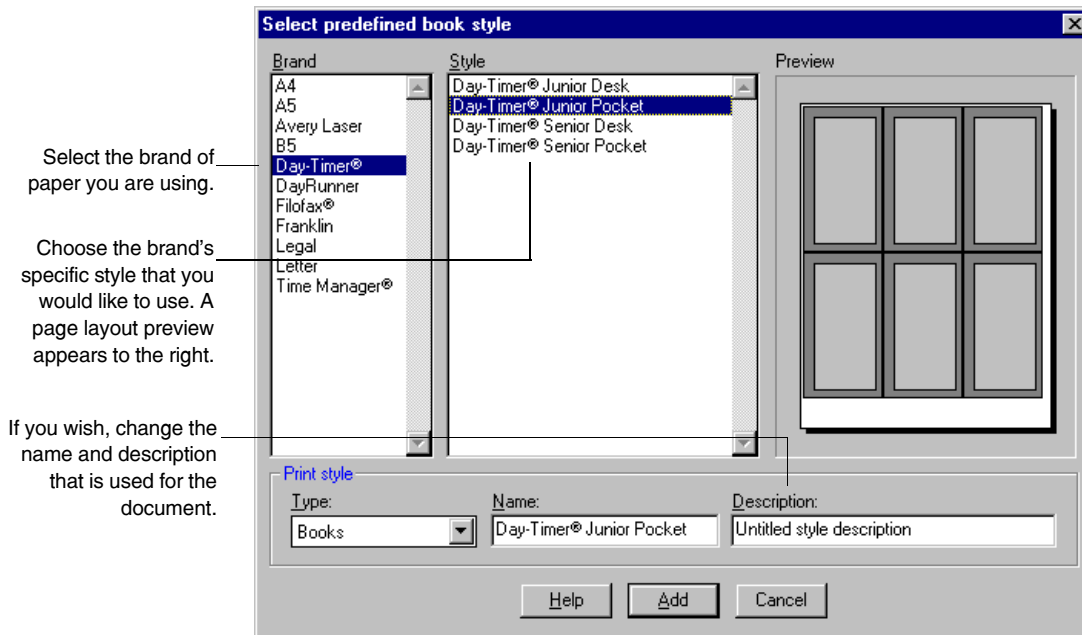
Use this window to choose a template that your new document style is based on.

Option	Description
Brand	Choose a brand name or category from the *Brand* list. For example, if you are creating a style for a Day-Timer® planner, select the Day-Timer® brand.
Style	Choose a format from the *Style* list. A layout preview of the selected style appears on the right.
Type	Specifies if the new style is for Books, Labels and Cards, or Envelopes.

Name	Enter the name of the document here.
Description	Enter a description for the new style. It may reflect paper size, contents, or printer to be used.

Style Setup

To edit a style:

♦ Select **File/Print book/Style setup**... **or...**

♦ Select **File/Labels/Style setup**... **or...**

♦ Select **File/Envelopes/Style setup**...

♦ Select the style that you wish to edit.

♦ Click the tab for the area you wish to edit.

♦ Change the values you need.

At any time, you may click the **Preview** button to see your listing before printing it. You may also click the **Print** button to send the document to your printer.

Page Setup

This section contains page margin information, and can also customize printer options for this one style without affecting any others.

To open this window:

♦ Select **File/Print book/Style setup**... **or...**
♦ Select **File/Labels/Style setup**... **or...**
♦ Select **File/Envelopes/Style setup**...
♦ Select the style that you wish to edit.
♦ Click the *Page setup* tab.

Select the printer and paper source from the pull-down lists.

Adjust your section margins here.

Select the number of rows and columns on the page using the pull-down menus.
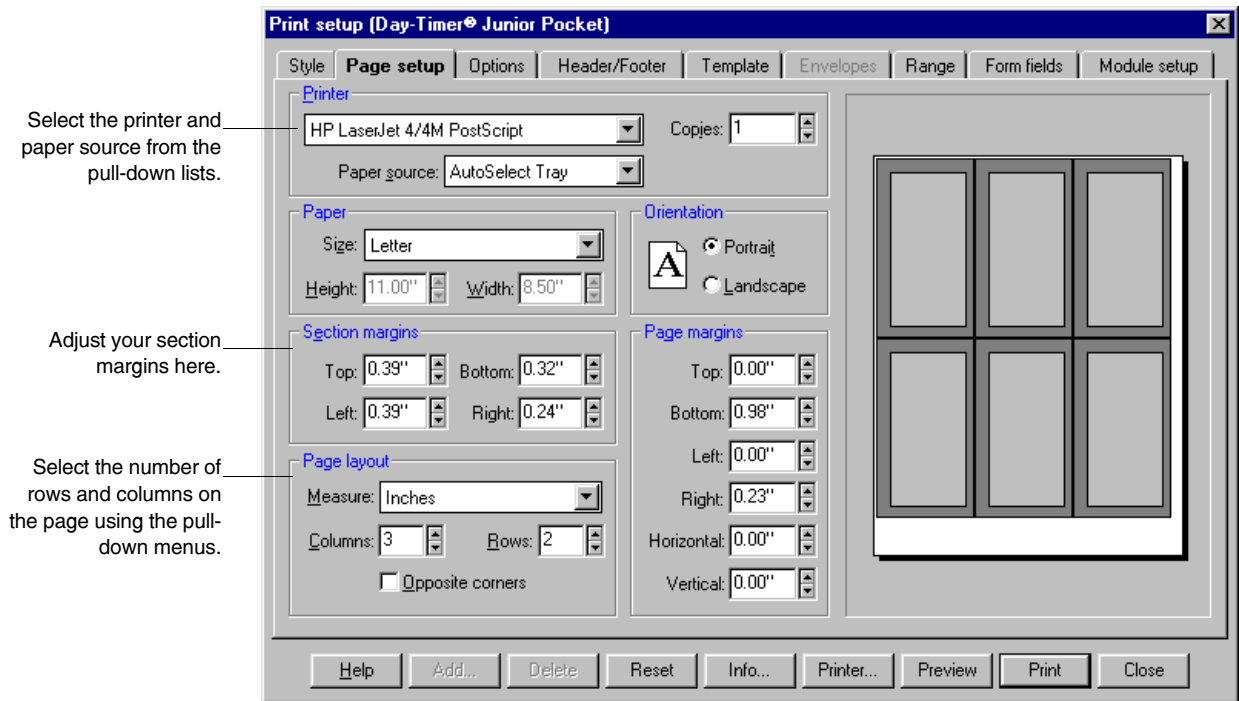
Use the Page setup tab to adjust the page layout and margins.

Printer	Option	Description
	Printer name	Select the printer to use for this style.
	Copies	How many duplicates of the listing are printed.
	Paper source	This is the paper tray which the printer will use.

Paper	Option	Description
	Size	You can select from a list of all sizes your printer driver supports.
	Height	If you selected a custom size, you can enter the height here. Otherwise, this value is for display only.
	Width	If you selected a custom size, you can enter the width here. Otherwise, this value is for display only.

Orientation   Select either portrait (normal) or landscape (wide).

Section margins   This group defines margins for each section. This is measured from the edge of each section to where text prints. If you think of a section as a page, these are like regular page margins.

Page layout   If you are printing a book listing, Address Book fits as many records in a section as it can. If you are printing labels or cards, it prints only one record per section. This is the main difference between book printing and labels & cards printing.

Option	Description
Measure	Select the unit of measurement that the program uses to set margins.
Columns & Rows	You can specify a number of rows and/or columns for each page, dividing it into sections. For example, a page with two rows and two columns has four sections. A page with three rows and two columns has six sections. You can use this to divide a large piece of paper into smaller, organizer-sized sections that fit in a paper planner. If you are printing cards or labels, select as many rows and columns as your paper has.
Opposite corners	Some organizer sheets for printers are laid out with one page right-side up and the other upside-down. If that is the case, check this option.

Page margins — These contain traditional page margins, with two exceptions:

Option	Description
Horizontal	This is the space between the bottom of one section and the top of another.
Vertical	This is the space between the right side of one section and the left side of another.

Options

This tab section lets you choose which records to print.

To open this window:

♦ Select **File/Print book/Style setup**… **or…**
♦ Select **File/Labels/Style setup**… **or…**
♦ Select **File/Envelopes/Style setup**…
♦ Select the style that you wish to edit.
♦ Click the *Options* tab.

Select what type of records you want to print: the database, a category, group, or topic, and more.

Select which field the records are sorted by.

You can use a date range to print just new or edited records.

Print setup (Day-Timer® Junior Pocket)

Style | Page setup | **Options** | Header/Footer | Template | Envelopes | Range | Form fields | Module setup

Print by: Range
Print range: [Entire book]
Sort by: <PAGE NAME>
☐ Current page (T)
☐ Repeat current record (for labels only)

Alphabet range
⦿ All letters ○ From: A To: Z

Date range
☑ New records ☐ Edited records
☑ Interval From: 12/10/96 Until: 7/10/97

Print options
☑ Print clones
☐ Page break before subject
☑ Section break before subject
☐ Print subject names

Help | Add… | Delete | Reset | Info… | Printer… | Preview | Print | Close

Use this window to select which records are printed, and how they are sorted.

Print by   You can narrow down the records to print by how your address book is organized.

Option	Description
Database	Prints all entries in your database by the sort key you select.
Pages	Groups records together by their address book page. For example, all entries on the *A-1* page are printed together, followed by all entries on *A-2*.
Range	Allows you to select a previously saved range, or custom subset, of records under the **Range** tab. For more information, see "Range" on page 120.
Companies	Prints only entries that include a company name.
Pages/Topics	This is a combination of *Pages* and *Topics*.
Topics	Only prints records located on topic pages. They are grouped with their fellow topic members.
Categories	Only prints records that have a category assigned to them. They are grouped with other members of their category.
Groups	Only prints records that are members of a group. They are arranged with other members of their group.

Sort by   Choose the field you want to use to sort the listing alphabetically. For example, <LAST NAME> sorts by everyone's last name, and <COMPANY> by their company name.

Print range   If you select *Print by:* `Range`, choose a previously saved range of records to print here. For more information, see "Range" on page 120.

Print current subject   When this is checked, only the page, category, topic, or group currently displayed in the Address Book window will print.

Repeat current record   If you are printing labels, this prints an entire sheet of the highlighted record. Use this to print return address labels for yourself, or if you make frequent mailings to one address.

Alphabet range   You can choose to print all letters, or select a specific letter range.

Date range | You can choose to print only entries which were edited within a specific date range.

Option	Description
New records	Check here to print only new entries.
Edited records	Check here to print only changed records. You can select both this option and *New records* to print new and edited records only.
Interval	Specify a date range to print records that were created or edited within a certain time period.

Print Options

Option	Description
Print clones	Normally, cloned records do not print. This is to avoid listing the same record twice as the original and the clone. However, if you are printing one subject, such as a topic or group, you can check here to make sure cloned records print.
Page break before subject	You may have chosen to print by a subject, such as a category, group, topic, or page. Check here to start a new page when beginning a new subject, such as a new letter.
Section break before subject	If you have broken each page into different sections, you may not want a page break between subjects because it may leave several sections blank on the rest of the page. Check here to start a new section for a new letter, category, topic, or group.

PostNet bar code for labels | These options are only available when you are printing labels.

Option	Description
Print bar code	Check here if you are printing mailing labels and would like to include a PostNet bar code. This speeds delivery of your package when you use the U.S. Post Office.
Relative to address	Choose whether you want the bar code to print on *Top* or on the *Bottom* of your address.

Headers and Footers

You can select, create, or edit headers and footers from this window. If you choose to print them, each section has its own header and footer. This is used mainly for printing books. If you select to print a header and footer for cards or labels, each individual card or label has a header and footer.

To open this

window:

♦ Select **File/Print book/Style setup**... **or...**
♦ Select **File/Labels/Style setup**... **or...**
♦ Select **File/Envelopes/Style setup**...
♦ Select the style that you wish to edit.
♦ Click the *Header/Footer* tab.

A preview appears here.

Select a pre-programmed header from the drop-down list.

Click here to create your own footer.
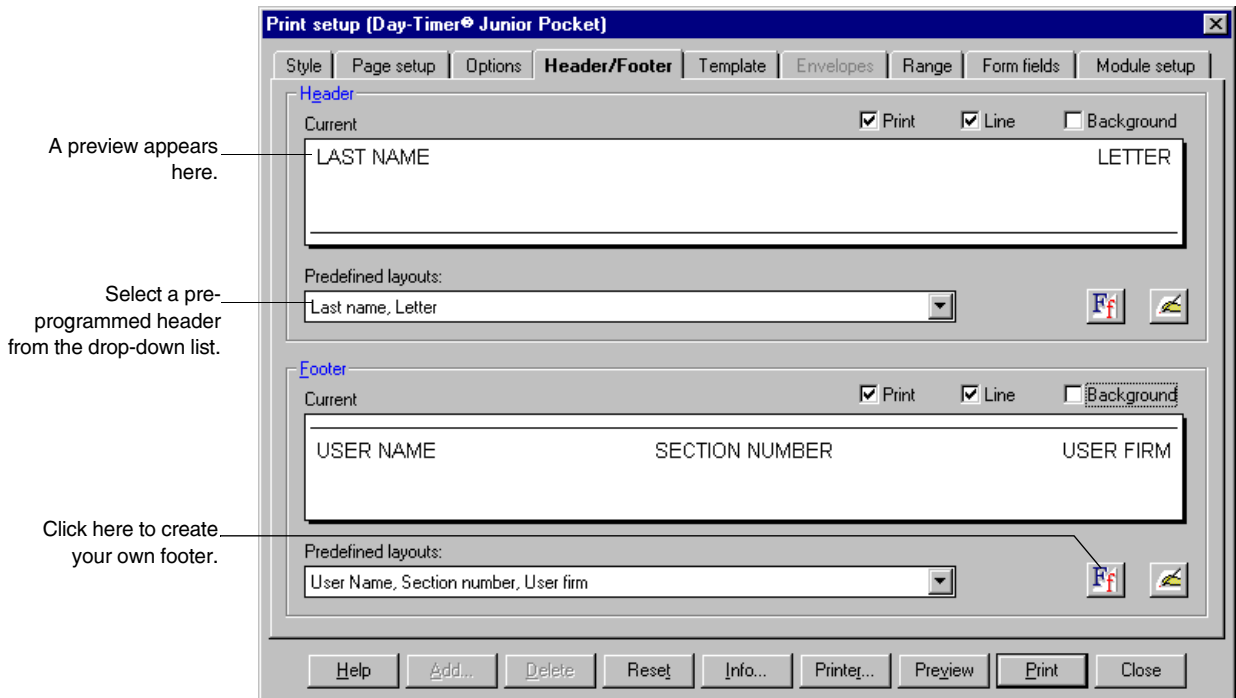
Use this window to select and customize your header and footer.

Option	Description
Current	This is a preview of the header or footer. Merge fields such as "PAGE," "LETTER," and "DATE" are filled in with the appropriate text when it is printed.
Print	Check here to include the header or footer in the printout.

Line	This prints a ruling line between the header or footer and the page text.
Predefined layouts	Several common headers and footers have been preprogrammed for you. Just select one from the drop-down list.
Font button	Click here to change the font used on the header and footer.
Custom	Click here to customize a header or footer.

Header/Footer Template

To access the Header/Footer custom template screen:

♦ In the previous dialog box, click on the Header's or Footer's **Custom** button.

Mark this box to include the header in the printout.

Include merge fields or text in the header to be right, left, or center justified.

Click on the Field button to see a list of available keywords.

Print setup (Day-Timer® Junior Pocket)

Style | Page setup | Options | **Header/Footer** | Template | Envelopes | Range | Form fields | Module setup

Header
Current   ☑ Print   ☑ Line   ☐ Background

LAST NAME   LETTER

Predefined layouts:
Last name, Letter

Footer
Current   ☑ Print   ☑ Line   ☐ Background

USER NAME   SECTION NUMBER   USER FIRM

Predefined layouts:
User Name, Section number, User firm

Help | Add... | Delete | Reset | Info... | Printer... | Preview | Print | Close

This dialog box is used to customize the Header; the Footer dialog box is nearly identical.

Option	Description
Print	This is the same as the **Print** check box in the previous window.
Height	The height of the header or footer in inches.
From text	The distance between the ruling line and header text in points.
Line style	You can choose a different line appearance: solid, dotted, or dashed.

Width	Select a line width from the drop-down box.
Color	Select a line color from drop-down box.
Left, Center, & Right columns	This is the header or footer text and/or merge fields. They are left, center, and right justified, respectively.
Font, Style, Size, Color	Use these drop-down lists to customize the text's appearance.
Font button	Click here for more font options.
Field button	Click here to get a list of available merge fields to use in the different columns.

Template

This window is where you specify how each record appears in the printout.

To open this window:

♦ Select **File/Print book/Style setup**… **or…**
♦ Select **File/Labels/Style setup**… **or…**
♦ Select **File/Envelopes/Style setup**… **or…**
♦ Click the *Template* tab.

Type in the distance you would like between records.

Either type in a specific width for the left column, or select "Auto" to have Address Book size it to the text. The right column takes up the remaining space.

This index line acts as a header for each record. You can select a different font style, and separate it from the rest of the record with a ruling line.

The template is divided into two columns, which are left- and right-justified.
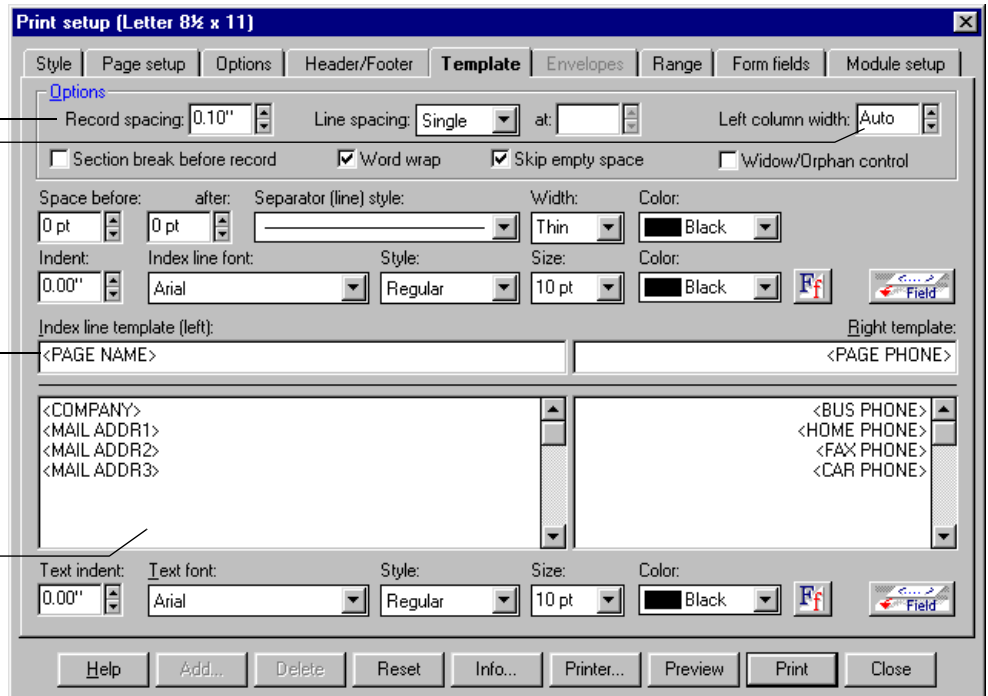
The Template tab allows you to select how each record appears in your printout.

Options	Option	Description
	Record spacing	Enter the distance between the last line of a record and the first line of the next.
	Line spacing	You can specify *Single* spacing, *1.5*, *Double*, or an exact amount. If you select *Exactly*, you must type a point size in the next spinner box.
	Left column width	Type in an exact measurement for the left column. If you type *Auto*, the left column sizes itself according to the information it prints.
	Section break before record	Check here to print only one record per section. Use this when printing labels and cards.
	Word wrap	Check here to make long text wrap, rather than print into the next column.
	Skip empty space	If a line has no information, check here to prevent that empty line from being printed.
	Widow/Orphan control	Check here to prevent the first or last lines of a record from being split over a section or page break.

Index line design options

These configure the index line's appearance.

Option	Description
Space before	Address Book can print a ruling line between a record's index text and body text. Select the space between the index text and the ruling line here.
Space after	Select the space between the ruling line and a record's body text.
Separator (line) style	Choose the type of line that prints between a record's index line and body text.
Width	Select line width from this drop-down box.
Color	Select line color from this drop-down box.
Fields button	Click here to open a window that lists available template keywords.
Indent	This is the amount of space between the index line and a section's left margin.
Index line font...	Select the index line text properties from these lists.
Font button F*f*	Click here for more font options.

Record template   In this section you specify which fields you want to print by placing keywords in the template. When you print, they are replaced with their corresponding record information.

For example, if the template reads: It prints...

```
<TITLE> <FIRST NAME> <LAST NAME>    Mr. Wile Coyote
<POSITION>                          Buyer
<COMPANY>                           Acme Products
<ADDR ONE>                          3000 Foot Drop Road
<ADDR TWO>                          Mojave Desert, CO
b. <BUS PHONE>                      b. 555-1212
```

The template is divided into two halves: a left-justified column and a right-justified column. Each column has an index line, specifying which field(s) print at the top of each record. Index lines can be separated from the rest of the record's information by a ruling line.

To edit the template:

♦ Place the cursor in a *Template* field.

♦ Click the **Fields** button to open the *Insert field* list box. Place the cursor in the template where you wish to insert the merge field.

♦ Double-click on the merge field you want to insert.

♦ Select *Insert new line* or *Insert space* from the top of the list to start a new line or add a space.

♦ Notice the "b." in the above example. This is *static*, or *fixed*, text which prints for each record. In this example, "b." is used to signify that the associated number is for this entry's **b**usiness phone. Simply type static text normally.

Please keep in mind that at present, the maximum length of the template text is 256 characters. You can overcome this limitation by using Form fields (see page 121 for details).

Text options   These configure the template body text appearance.

Option	Description
Text indent	This is the amount of space between the index line text a section's left margin.
Text font...	Select the index line text properties from these lists.
Font button F*f*	Click here for more font options.
Fields button	Click here to open a window that lists available template keywords.

Envelopes

Address Book's envelope printing lets you create perfect envelopes with just a few mouse clicks. One of the more distinct features of this facility is its ability to print to as many printers as you have connected to your PC.

The envelope printing facility can be configured to support just about any type of envelope. It comes with several pre-configured styles. You can use these as-is, or modify them to suit your needs. You can also create styles of your own.

To open this window:

♦ Select **File/Envelopes/Style setup**...

♦ Select the style that you wish to edit.

♦ Click the **Envelopes** tab.

Chose the return address Form fields from these pull-down lists.

Mark this box to include the PostNet bar code on envelopes.

Choose a message to be included from the pull-down list.

You can set up envelope addresses, fonts, and layout.

Return address	Option	Description
	Business	Use the pull-down menu to specify the form field to be used for your business address. When you select a form field, an edit window opens allowing you to modify it.
	Home	Select the form field to be used for your return home address.

Mailing	Choose the form field to be used for printing your mailing address.
Shipping	Specify the form field to be used for your shipping address.
Print	Use the pull–down menu to select which of the above addresses will print.
Font	Click this button to select a different font.
Left	The distance from the envelope's left edge to the return address.
Top	The distance from the envelope's top edge to the return address.
Omit return address	Mark this box if you do not wish to include a return address on the envelope. This is most often used for envelopes with a company logo or return address pre–printed.

Recipient address

Option	Description
Business	Use the pull–down menu to specify the form field to be used for the recipient's business address. When you select a form field, an edit window opens allowing you to modify it.
Home	Select the form field to be used for the recipient's home address.
Mailing	Choose the form field to be used for the recipient's mailing address.
Shipping	Specify the form field to be used for the recipient's shipping address.
Print	Use the pull–down menu to select which of the above addresses prints.
Font button	Click this button to select a different font.
Left	The distance from the envelope's left edge to the recipient's address.
Top	The distance from the envelope's top edge to the recipient's address.
Print using upper case	Prints the recipient's entire address in capital letters.

Envelope size   When you have selected a custom envelope, you can configure its size here.

Option	Description
Height	This is the envelope's height.
Width	This is the envelope's width.
Design button	Click here to select an envelope type and configure where addresses, Postnet bar codes, and messages print.

PostNet bar code Allows you to print PostNet bar codes on your envelopes. Bar codes allow your mail to bypass certain sorting procedures. This means it can be delivered more quickly. Specify the position of the PostNet bar code relative to the upper left corner of the envelope. If you do not want PostNet codes on your envelopes, un-check the associated *Print PostNet* box.

Option	Description
Left	The distance from the envelope's left edge to the PostNet bar code.
Top	The distance from the envelope's top edge to the PostNet bar code.
Print PostNet	When checked, the PostNet bar code is printed on the envelope.

According to the USPS Mail Flow Planning System, PostNet bar codes can be printed above or below the address, as long as it does not touch any lines or printing. Leave a space at least .04 inches between the bar code and any text above or below it. Also, keep the bar code at least .125 inches from the envelope's window (if it has one). The bar code should appear within 4 inches from the bottom of the envelope, and should be spaced at least .5 inch from the left and right edges of the envelope. This gives you plenty of room for adjustments.

Some earlier versions of printer drivers do not handle PostNet bar codes properly. The bars may be too thick or spaced unevenly. Check to see that your printer's Post-Net bar codes look correct by comparing them to the codes on mail you have received. If they do not match, contact your printer manufacturer for the most recent printer driver.

Feed options Click the graphic that shows how you feed envelopes into the printer.

Option	Description
Face up	Mark this to indicate that envelopes are fed into your printer printed side up.
Face down	Mark this to indicate that envelopes are fed into your printer printed side down.
Clockwise rotation	Mark this is the envelope need to be rotated clockwise to be printed properly. Leave this blank if you need to rotate the envelope counter-clockwise for inserting. The feed graphics change when this is checked.

Message   Specifies a short message to appear in the lower left corner of your envelope. The list contains many notes, and you can edit or add to the list by pressing the **Message** button. If you do not want any message printed, erase the text in this field.

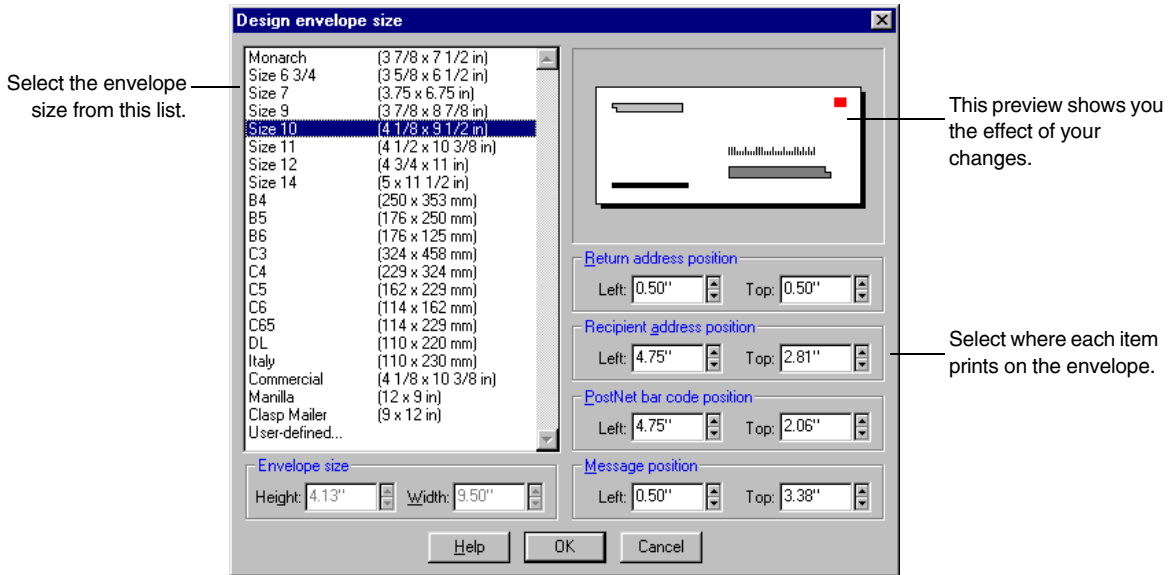| Option	Description
Print	Use the pull–down menu to select a message to print. To add or change messages click on the **Message** button.
Message button	Opens the *Envelope Messages* dialog box, which lets you edit or add messages.
Left	The distance between the envelope's left edge and the message.
Top	The distance between the envelope's top edge and the message.
Font button	Click this button to select a different font.

To add a new message:

♦ Click the **Message** button.

♦ Click the **Add** button. The *Add Envelope Message* dialog box appears:

♦ Type the new message text in the *Name* field and click **OK**.

Envelope Design

When you specify envelope margins for addresses, bar codes, and messages, you cannot see the results on the *Envelopes* tab. Use the *Design envelope size* window to see a preview of your settings as you make them, or select a different envelope size.

To change a style's envelope design:

♦ Select **File/Envelopes/Style setup**…

♦ Click the *Envelopes* tab.

♦ Click the **Design** button. The *Design envelope size* window appears.

Select the envelope size from this list.

This preview shows you the effect of your changes.

Select where each item prints on the envelope.

Select a different envelope size and configure its layout.

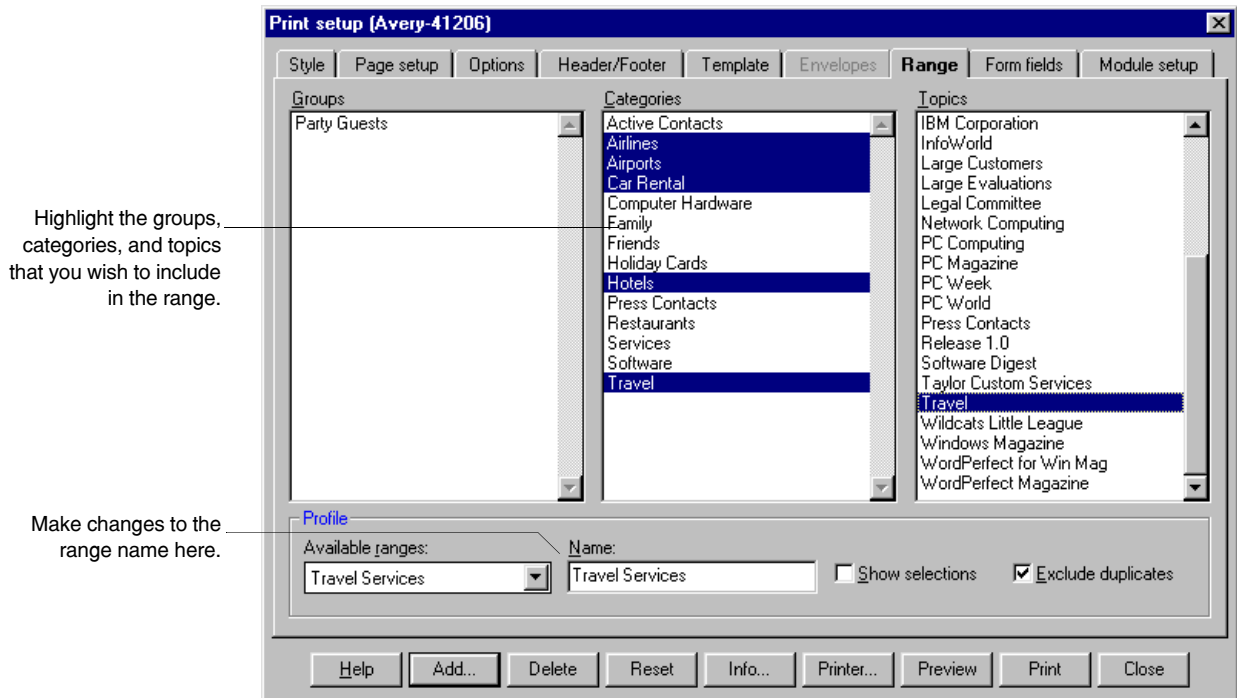| Option	Description
Envelope list	Select any of the pre-programmed, popular envelope sizes from this list. If you use envelopes with an unusual size, select *User-defined* from the bottom.
Envelope size	If you select *User-defined* under *Envelope list*, enter the envelope's dimensions here.
Preview	This shows where items, such as addresses and messages, print on the envelope.
Return address position	Select how far the return address should print from the left and top envelope edges.
Recipient address position	Select how far the recipient address should print from the left and top envelope edges.

PostNet bar code position	Select how far the bar code address should print from the left and top envelope edges.
Message position	Select how far the message should print from the left and top envelope edges.

Range

You can create a range of records, composed of groups, categories, topics, and queries. These ranges are saved as profiles, which can be selected from any print style.

To open this window:

♦ Select **File/Print book/Style setup**... **or...**

♦ Select **File/Labels/Style setup**... **or...**

♦ Select **File/Envelopes/Style setup**...

♦ Click the *Range* tab.

Highlight the groups, categories, and topics that you wish to include in the range.

Make changes to the range name here.

Use this dialog box to combine groups, topics, and categories into a range for printing.

To create a range:

♦ Click the **Add** button.

♦ Type a name for the new range profile and click **OK**.

♦ Highlight all the groups, categories, and topics you want to include in this range.

♦ Click the **Close** button or select another tab to save your changes.

To edit a range:

♦ Select the range from the *Available ranges* drop-down box.

♦ Make the changes.

♦ If you wish to change a profile name, type the new one in the *Name* box.

♦ Click the **Close** button or select another tab to save your changes.

This window has two other options.

Option	Description
Show selections	When this is checked, the list boxes show only the selected groups, categories, topics, and queries. All others will be hidden. This prevents you from making accidental changes.
Exclude duplicates	If you have selected several subjects, a record may fall under more than one. For example, *Mom* might be in your *Family* topic and the *Party list* group. Normally, her record would print for each subject it belongs to, resulting in multiple copies. If you check this box, it only prints once.

Form Fields

You may have some combinations of merge fields that you use frequently in several print document styles—address listings, phone listings, company information, to name a few. Form fields let you group many merge fields together under one *form name*. This can be used as a regular merge field in the record template and are also used for envelope address selection.
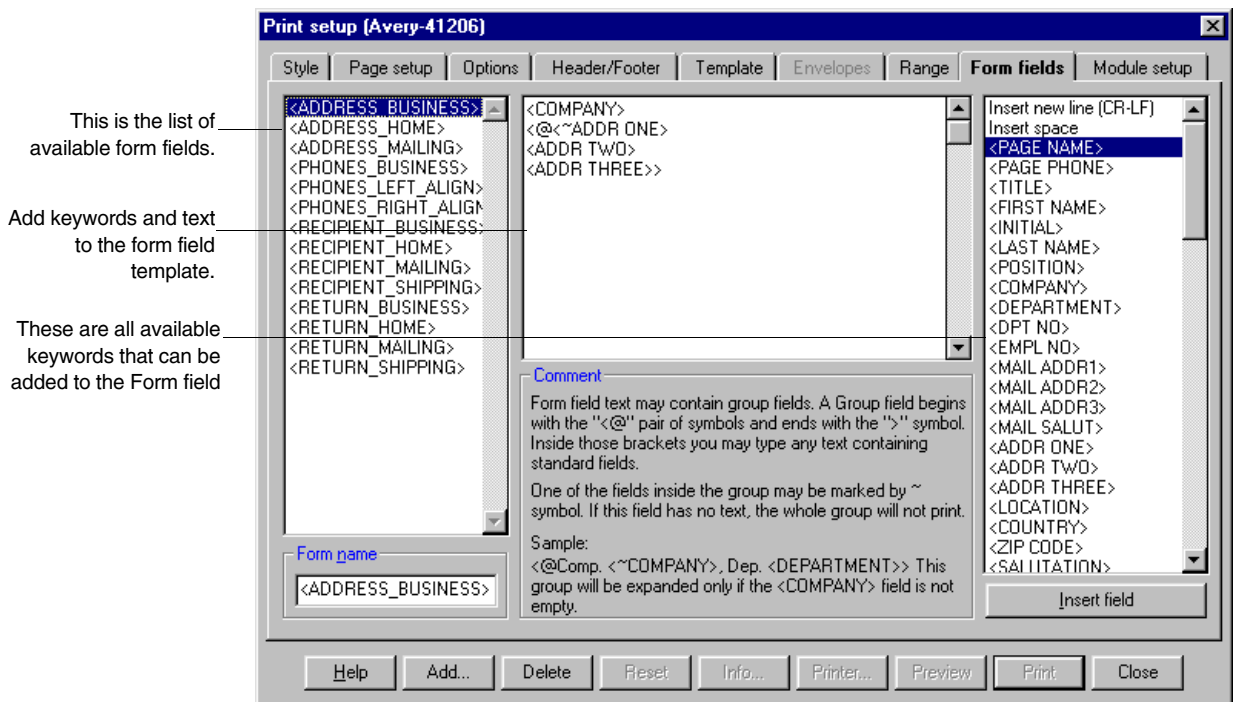
To open this window:

♦ Select **File/Print book/Style setup**… **or...**

♦ Select **File/Labels/Style setup**… **or...**

♦ Select **File/Envelopes/Style setup**…

♦ Click the *Form fields* tab.

To create a new form field:

♦ Click the **Add** button.

♦ Type a form name. Its name must be all upper case letters and enclosed in brackets, like <ADDR LIST> or <TELEPHONE LIST>.

♦ If you want to copy information from the currently highlighted form, check *Copy current form field*.

♦ Click **OK** to create the form.

To edit a form field:

♦ Highlight the form field's name.

♦ Make your changes. They are saved when you click any tab or close the window.

This is the list of available form fields.

Add keywords and text to the form field template.

These are all available keywords that can be added to the Form field

You can create form fields to group frequently-used keywords together.

Building a form is like creating a print template. Here are some notes about using forms:

✦ Form fields can contain groups, which are composed of related information. For example, an address and phone listing form might have one group for address fields and another for phone fields. Each group begins with the symbols <@ and ends with >.

✦ You may not want a specific group to print if it is lacking important information. In this case, put the ~ symbol in front of the key field. For example, if you have a

group full of company information, you would not want all the fields and labels to print if a record didn't have a company name. In that case, put the symbol in front of the company keyword: `<~COMPANY>`. When the company name is blank, the entire group is skipped.

Once your form is created, place the form name in the record template where you want the information to appear.

Module Setup

To open this window:

♦ Select **File/Print book/Style setup**... **or...**
♦ Select **File/Labels/Style setup**... **or...**
♦ Select **File/Envelopes/Style setup**...
♦ Click the *Module setup* tab.

Select the type of printer to use for each style.

Mark here to override individual style printer selections.

Click the 📂 button to share documents and templates on a network.

The Module setup tab allows you to define which printer to use for various print types.

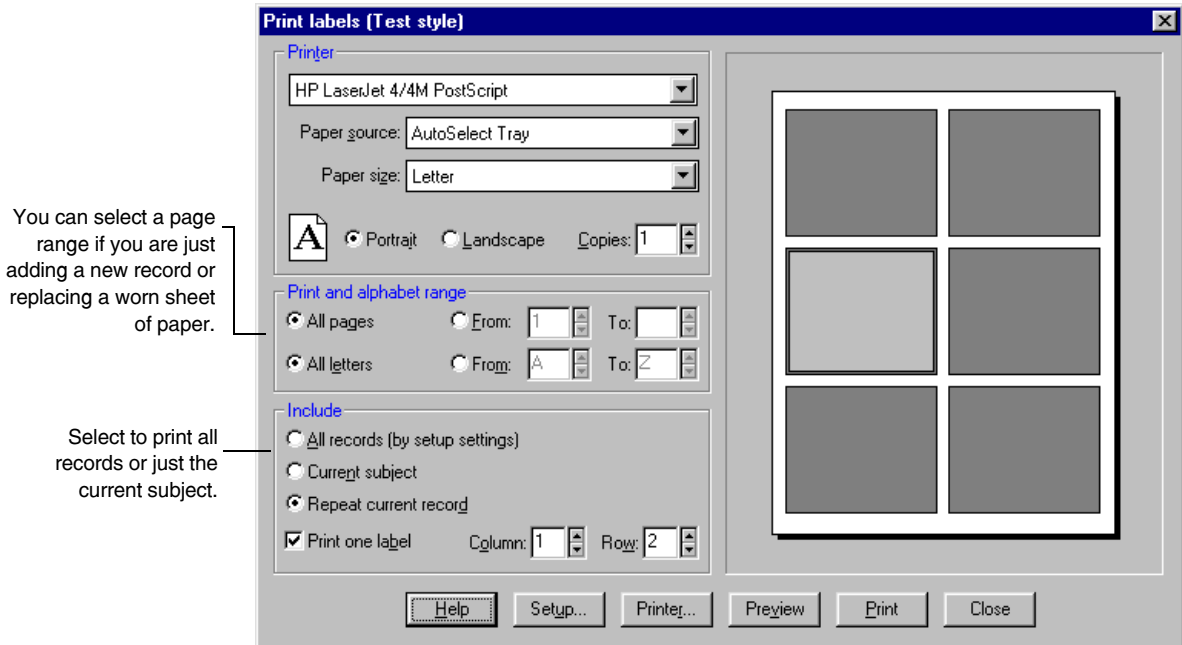| Option	Description
Default printers...	You can select a default printer and paper tray each type of Address Book printing.
Automatically follow default...	Select this option to use default printers and paper trays. If you remove the check, each document uses the settings under its *Page setup* tab.
Edit file for	Normally you will be working with documents, so *Documents styles* are selected. If you want to edit a template, check *Templates styles* and edit the template as you would a document.
Clear Printing menu	Address Book's printing submenus keep track of the last few styles you used. Click this button to clear the submenus.
File location	If your computer is on a network, you may want to share print setups with other users. Click on the button to open another document or template file, either on your computer or on your network.

Printing Books, Labels and Cards

To print an existing label style:

♦ Select **File/Print book/[Style name]…** from the menu, **or…**

♦ Select **File/Labels/[Style name]…** from the menu (for labels or cards)

♦ Click on **Print**. The *Print* window opens.

You can select a page range if you are just adding a new record or replacing a worn sheet of paper.

Select to print all records or just the current subject.

You can override some print style options at the last minute without changing your document style setup.

This allows you to make changes to print options that affect just this one printout. Click the **Preview** button to approve your book, labels, or cards before printing them. Click the **Print** button to send the document to your printer.

Printer   If necessary, choose a different printer, paper source, and paper size here.

Option	Description
Portrait/ Landscape	Choose the orientation you want.
Copies	Select the number of copies to print.

Print and alphabet range	Option	Description
	All pages	This prints the entire document.
	Pages From - To	Enter a page range to print just a portion of the document.
	All letters	This prints the entire alphabet.
	Letters From - To	Enter a letter range to print just a portion of the alphabet.

Include	Option	Description
	All records (by setup settings)	This option prints all records that the style is configured to use. For example, if the style is set up to print your entire book, you get all entries. If it is configured to use a range of certain topics and groups, you get only the records belonging to those topics and groups.
	Current subject	Prints the letter, topic, group, or category currently viewed in Address Book.

Page options   When you print book listings, the following options are available.

Option	Description
One side	Select this option to print single-sided pages.
Both sides	Prints your book with double-sided pages. You do not need a double-sided printer to take advantage of this feature. First Address Book prints the top side of the sheet, then pauses and lets you feed the paper back through to print the reverse side.
Booklet to fold	Formats a double-sided printout into a foldable booklet.
Print in reverse order	Select this option if you want to print from the last page to the first page.

Label options   When you print labels, two more options are available in the *Print* window.

Option	Description
Repeat current record	If you are printing labels, check here to print multiple copies of the currently selected record. Use this to print return address labels, or a sheet of labels for an address you mail to frequently.
Print one label	If you only need one label for a certain record (like when you need to send one package out), check here. If you are printing on a page where some labels have already been used, use the *Row* and *Column* designations to tell Address Book where to print this label. Before using a partially used sheet of labels, it is very important to check you printer documentation and make sure this will not damage your printer.

Button functions

Command	Description
Setup	Returns to the setup window.
Printer	Opens your Windows printer driver setup.
Preview	Previews your printout.
Print	Prints your book, labels, or cards.
Close	Closes this window without printing.

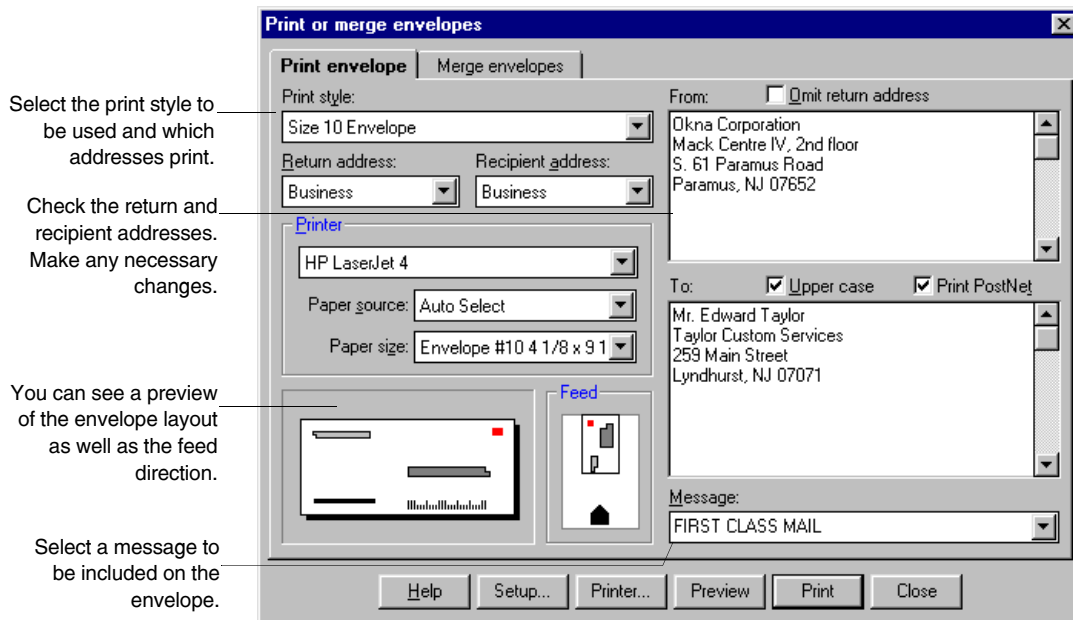## Printing Envelopes

Envelopes can be printed one at a time or for a group of people. This section explains each of the print dialog boxes associated with envelope printing.

Print Envelope Dialog Box

Use this to print just one envelope.

To access this dialog box:

♦ Select **File/Envelopes/(Style name)...** command.

♦ Select the *Print envelope* tab. The following dialog box appears:

Select the print style to be used and which addresses print.

Check the return and recipient addresses. Make any necessary changes.

You can see a preview of the envelope layout as well as the feed direction.

Select a message to be included on the envelope.

The Print envelope window allows you to make changes which affect just this one printout.

Option	Description
Print style	Select a pre-defined envelope style from the pull-down list.
Return and Recipient Addresses	If necessary, use the drop-down lists to select the appropriate return and recipient addresses.
Printer	Choose a different printer, paper source, and paper size, if necessary.
Preview	Shows envelope layout.
Feed	Shows the proper direction to insert the envelope into the printer.
From	This is a preview of the return address to be used.
Omit return address	Mark this if you do not want to print a return address. This is generally used with envelopes that have a pre-printed return address or logo.
To	Shows a preview of the recipient address to be used.
Upper case	Converts the recipient address to capital letters.
Print PostNet	Includes a PostNet bar code to expedite delivery time.
Message	Shows the message to be included on the envelopes. This can be changed using the pull-down menu.

Button functions

Command	Description
Setup	Lets you to make changes to the selected style.
Printer	Chooses a different printer.
Preview	Opens the *Print Preview*, allowing you to see a sample of the output before it is sent to the printer.
Print	Prints the envelope
Close	Closes the dialog box without printing anything.

Merging Envelopes

This prints multiple envelopes for your entire address book, or a selected range.
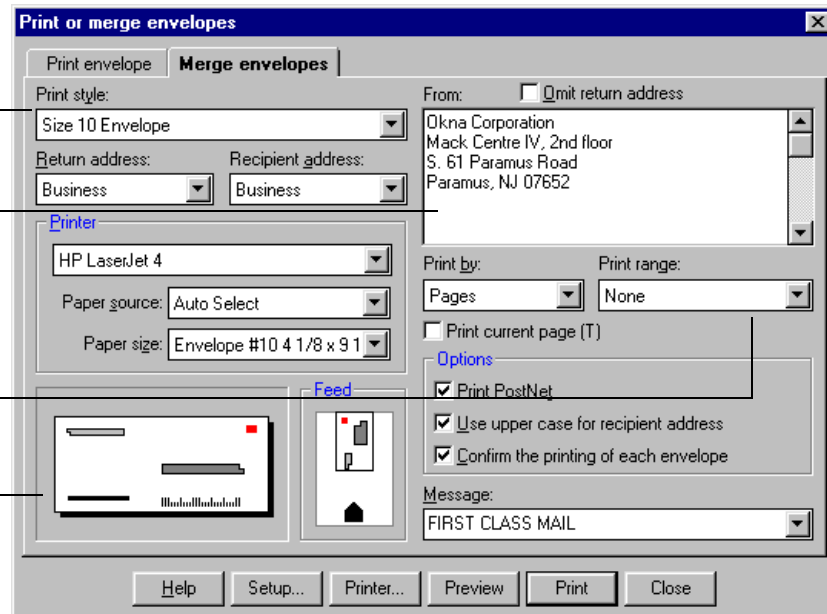
To open this window:

♦ Select **File/Envelopes/[*Style name*]...** command.

♦ Select the *Merge envelopes* tab.

♦ Make any necessary changes.

Select the print style to be used and which addresses print.

Check your return address and make any necessary changes.

Select a print range from the pull-down list.

You can see a preview of the envelope layout as well as the proper feed direction.

You can make changes that affect just this one printout.

Option	Description
Print style	Select a pre-defined envelope style from the drop-down list.
Return and Recipient Addresses	Use the drop-down lists to select the appropriate return and recipient addresses.
Printer	Choose a different printer, paper source, and paper size.
Preview	Shows envelope layout
Feed	Displays how you feed envelopes into the printer.
From	Previews of the return address to be used.
Omit return address	Mark this if you do not want to print a return address. This is generally used with envelopes that have a pre-printed return address or logo.

Print by You can narrow down the records to print by how your address book is organized.

Option	Description
Database	Prints all records in your database by the sort key you select.
Pages	Groups entries together by their address book page. For example, all entries on the *A-1* page are printed together, followed by *A-2* entries.
Range	Allows you to select a previously saved range, or custom subset, of records under *Print range*. For more information, see "Range" on page 120.
Companies	Prints only records that have a company name entered.
Pages/Topics	This is a combination of *Pages* and *Topics*.
Topics	Prints only topic pages.
Categories	Only prints categories.
Groups	Prints only groups.

Options

Option	Description
Print range	If you select *Print by:* Range, choose a previously saved range of records to print here. For more information, see "Range" on page 120. If no range is selected, all records are printed.
Print current subject	This prints the letter, topic, group, or category currently displayed in Address Book.
Print PostNet	Includes a PostNet bar code near the address to expedite delivery time.
Use upper case for recipient address	Converts the recipient address to all capital letters.

Confirm the printing of each envelope	Allows you to preview each recipient address before it is printed to make any necessary changes.
Message	Shows the message to be included on the envelopes. This can be changed using the pull-down list.

Button functions

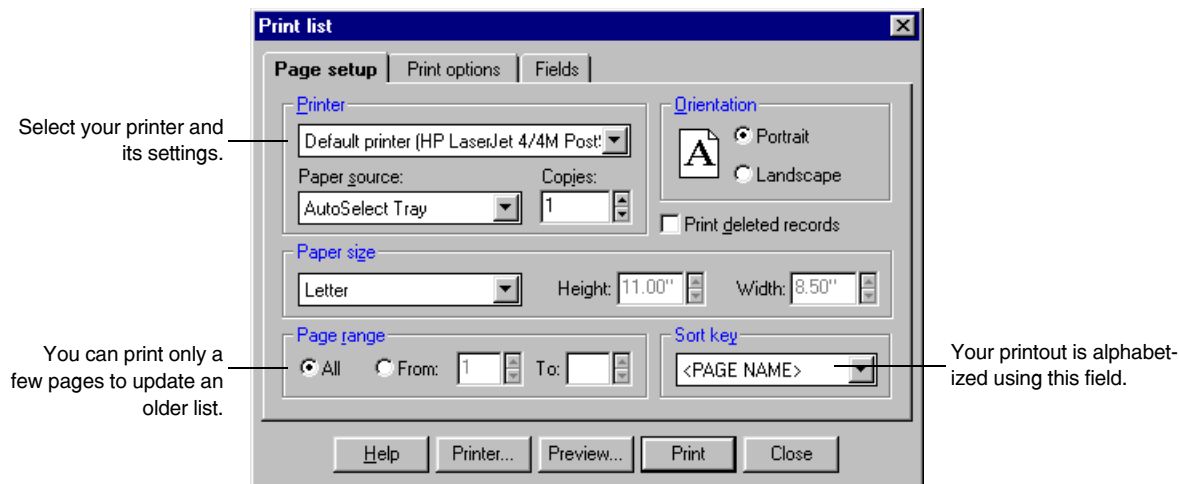| Command	Description
Setup	Lets you make changes to the selected style.
Printer	Chooses a different printer.
Preview	Shows a sample of the envelopes before they are actually sent to the printer.
Print	Prints the envelopes
Close	Closes the *Print* dialog box without printing.

Printing Lists

You can print any list in a spreadsheet-like format. You can then share the information with your colleagues, or take it along with you. This feature can only be accessed when in List view.

Before you print for the first time, you should go through the print setup to determine the options that you will use.

Page Setup

To select the Page setup:

♦ Make sure that you are in a list view.

♦ Select the **File/Print list**...command.

♦ Click on the *Page setup* tab. You will see the following:

Set up printer and paper options from this dialog box.

Select your printer and its settings.

You can print only a few pages to update an older list.

Your printout is alphabet-ized using this field.

Printer	Option	Description
	Printer	Choose the printer you want to use from this drop-down list.
	Paper source	Select which paper tray to use.
	Copies	Type how many copies you want to print.

Orientation — Select whether you want to print portrait (vertical length is greater) or landscape (horizontal length is greater).

Print deleted records — When you clear entries from Address Book, they can sometimes remain in your database until you run File Doctor with the *Pack Database* option (see page 99). If you accidentally deleted an entry or two from your Address Book page, you may be able to use this option to print a copy of the deleted data. You can then use the print-out to re-enter the record.

Paper size	Option	Description
	Size	Select which form of paper you want to use (letter, legal, A4, etc.).
	Height & Width	If your printer driver allows you to use a custom size, enter the paper's height and width here.

Page range	Option	Description
	All	Prints all pages of the formatted printout.
	From/To	Select a page range to print just a partial list.

Sort key   Select which field is used to alphabetize the printout.

Button functions

Option	Description
Help	Opens the help file.
Printer	Opens the printer driver's setup window.
Preview	Generates a preview of the printed list, so you can approve your setup before printing it out.
Print	Prints the list.
Close	Closes the window without printing.

Print Options

To select the Print options:

♦ Make sure that you are in a list view.

♦ Select the **File/Print list**... command.

♦ Click on the *Print options* tab.

Set page margins here.

Select the font and its settings.

You can configure row spacing to make the printout more legible.

Select and customize a header and footer.

Use this window to configure the list's layout.

| Margins	Option	Description
	Lines between columns	Prints a ruling line to separate columns.
	Top	Enter the amount for the top margin.
	Bottom	Enter the amount for the bottom margin.

	Left	Enter the amount for the left margin.
	Right	Enter the amount for the right margin.

Rows	Option	Description
	Spacing	Select single, one-and-a-half, double, or an exact point size for line spacing.
	At	If you select *Spacing:* `Exactly`, enter the point size here.
	Wrap	Word-wraps text that doesn't fit.
	Clip	Cuts off text that doesn't fit.

Font	Option	Description
	Name	Select which font you want to use.
	Size	Select the font size.
	Style	Choose from regular, bold, italic, or a combination of styles.
	Color	Select a font color.
	Font button	Opens a window allowing you to choose more sophisticated font options and preview your selection.

Options	Option	Description
	Print header	Check here to print a header.
	Header button	Customizes the header (see "Headers and Footers" on page 110).
	Print footer	Prints a footer (see "Headers and Footers" on page 110).
	Footer button	Click here to customize the footer.
	Print headings	Prints column labels.

Fields

To select the fields:

♦ Make sure that you are in a list view.

♦ Select the **File/Print list**...command.

♦ Click on the *Fields* tab. You see the following:
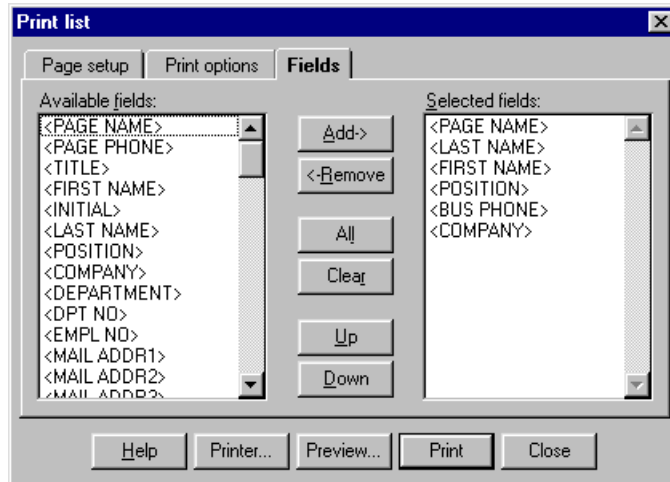
Select the type of information you want to print.

Use the following editing buttons to edit the selected fields:

Command	Description
Add	Includes the highlighted *Available field* in the printout.
Remove	Removes the highlighted *Selected field* from the printout.
All	Includes all *Available fields* in the printout
Clear	Removes all *Selected fields* from the printout. This allows you to start from scratch.
Up	Moves the highlighted *Selected field* up one position in the list.
Down	Moves the highlighted *Selected field* down one position in the list.
Printer	Opens the *Printer Properties* dialog box for the selected printer.
Preview	Allows you to view the printout on–screen before sending it to the printer.
Print	Sends the selected list's information to the printer.

Setup Options

The following sections describe the main Address Book setup windows.
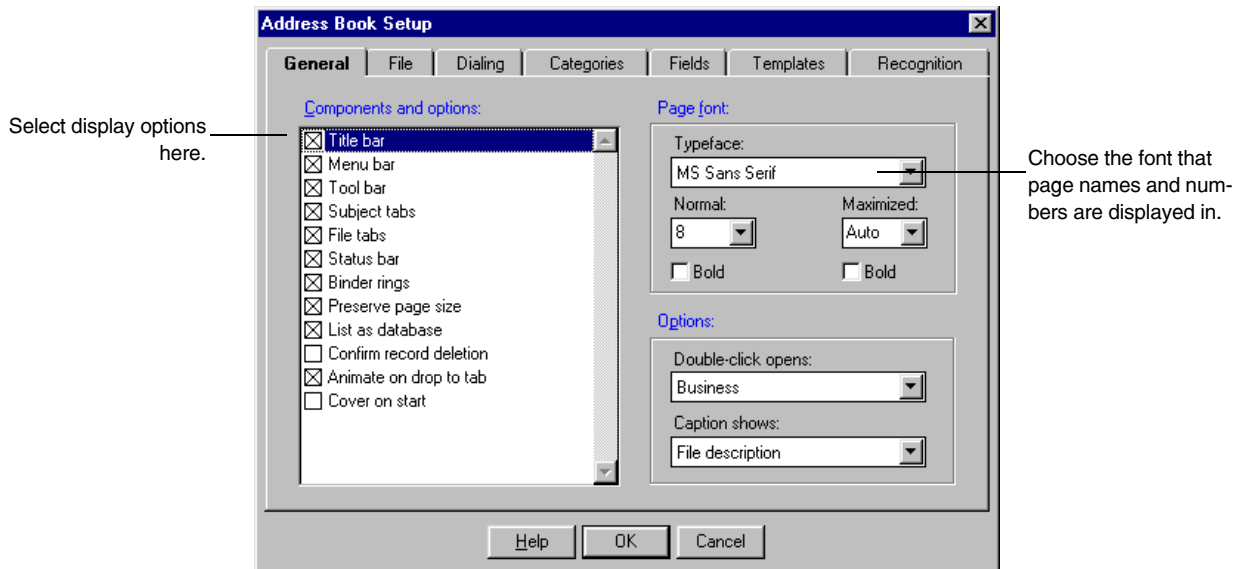
To set up Address Book options:

♦ Select **File/Setup**.

♦ Select the tab that you want to modify.

♦ Make any necessary changes.

♦ Click **OK** to save your changes.

General Options

Use this window to change your viewing preferences and fonts, and control Dialer integration.

To configure general options:

♦ Select **File/Setup...** from the menu.

♦ Click on the *General* tab.

Select display options here.

Choose the font that page names and numbers are displayed in.

Customize Address Book's appearance with this dialog box.

Components and options

This list lets you select which of Address Book's window components are displayed. You can turn tabs on and off, show or hide the center binder rings, or animate drag-and-drop operations.

Page font
You can define the font attributes to be used when the Address Book is running as a Normal window or Maximized (full screen).

Double-click opens
Specifies what is shown when you double-click on an existing record to open its folder.

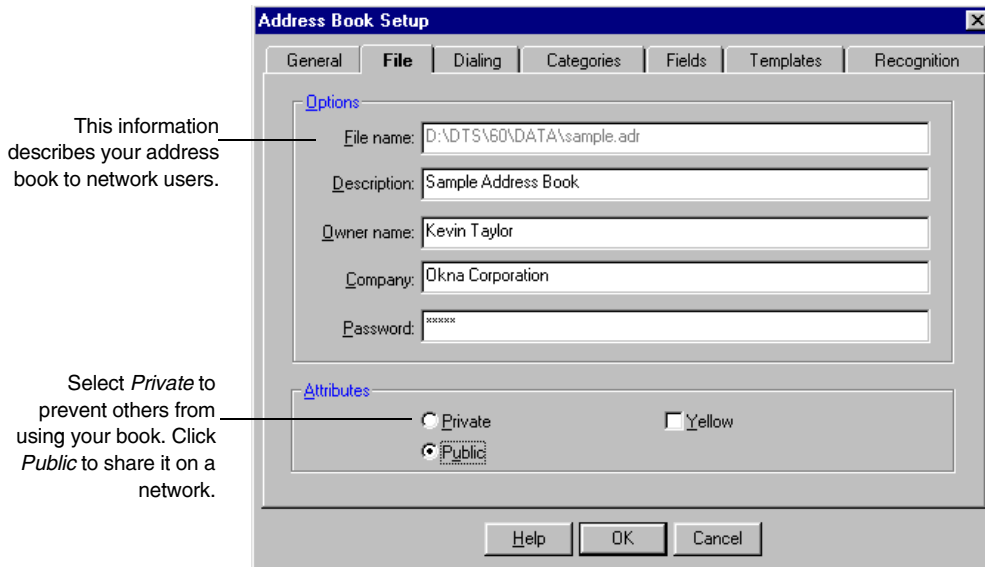| Option	Description
Default	Opens to whatever view is specified in the Folder's Setup (set by choosing **File/Setup** from an open Folder's Menu Bar).
View summary	Opens the *Record* subject's **View** tab.
Business	Shows the *Record* subject's **Business** tab.
Home	Displays the *Record* subject's **Home** tab.
Dialing	Presents the *Record* subject's **Dialing** tab.
Follow-up events	Displays a list of reminders.
Calls	Shows the *Phone Log* subject.
Follow-up calls	Displays a list of pending calls.

Caption shows
These options specify the label for Address Book's icon when the program is minimized.

Option	Description
File description	Uses the current address book's description as it appears in the *Address Book Setup* window's **File** tab.
File Name	Shows the current Address Book's file name.
Nothing	Does not display any icon label.

File

These options are used to distinguish one Address Book file from another, and to control access to your information.

This information describes your address book to network users.

Select *Private* to prevent others from using your book. Click *Public* to share it on a network.

Address Book Setup

| General | **File** | Dialing | Categories | Fields | Templates | Recognition |

Options

File name: D:\DTS\60\DATA\sample.adr

Description: Sample Address Book

Owner name: Kevin Taylor

Company: Okna Corporation

Password: *****

Attributes

○ Private   ☐ Yellow
● Public

Help | OK | Cancel

Here you can change the address book's name as well as other related information, and enter a password.

To configure file options:

♦ Select the **File/Setup** command.

♦ Click on the *File* tab. The *File Options* dialog box appears.

Options

Option	Description
Filename	Shows the name of the current Address Book file, as well as the drive and directory that it is saved in. This is for display only and cannot be edited.
Description	Use this field to describe the contents of the book. The default description is *Address Book*, but you may change this to suit your preferences.
Owner	Specifies the owner of this address book. By entering your name here, this field can then be inserted in templates by specifying the keyword **<MY NAME>**.

	Company	Specifies the owner's company name. This field can be inserted in letter templates by specifying the keyword **<MY COMPANY>**.
	Password	Specifies a password that the user is required to enter before Address Book can be opened. See "Available Address Books List" on page 74.

Attributes	Option	Description
	Private	Makes sure your book can only be opened from your computer. This prevents network users from seeing your information.
	Public	Allows other people to access your book over a network.
	Yellow	Check here to change the pages to a yellow color. This can be used to create a *Yellow Pages* file.

Dialing

These options configure DeskTop Set's integration between Address Book and Dialer. You can specify which phone information shows in each folder's *View* filter, as well as select a third-party TAPI dialer.

Dialing options	Option	Description
	Enable dialing (Double-click)	Lets you dial from Address Book by double-clicking on the page phone. If this is turned off, selecting a dialing command opens the entry's folder instead of placing a call.
	Dialer shows selected record	Dialer's display shows the name, company, and number for the selected record.
	Dial using TAPI	Ignores DeskTop Set's dialing settings, and uses the settings in the *Modem* control panel.
	Telephones as dialed	Folders display telephone numbers as they are dialed, including international codes.
	Country code	Folders display country codes with telephone numbers.
	Extension	Dial the extension (if any) after dialing the phone number.

Categories

To create categories for the current Address Book:

♦ Select the **File/Setup** command.

♦ Click on the *Categories* tab. The *Category setup* dialog box appears.

Select a category to configure from this list.

Type the category's name here.
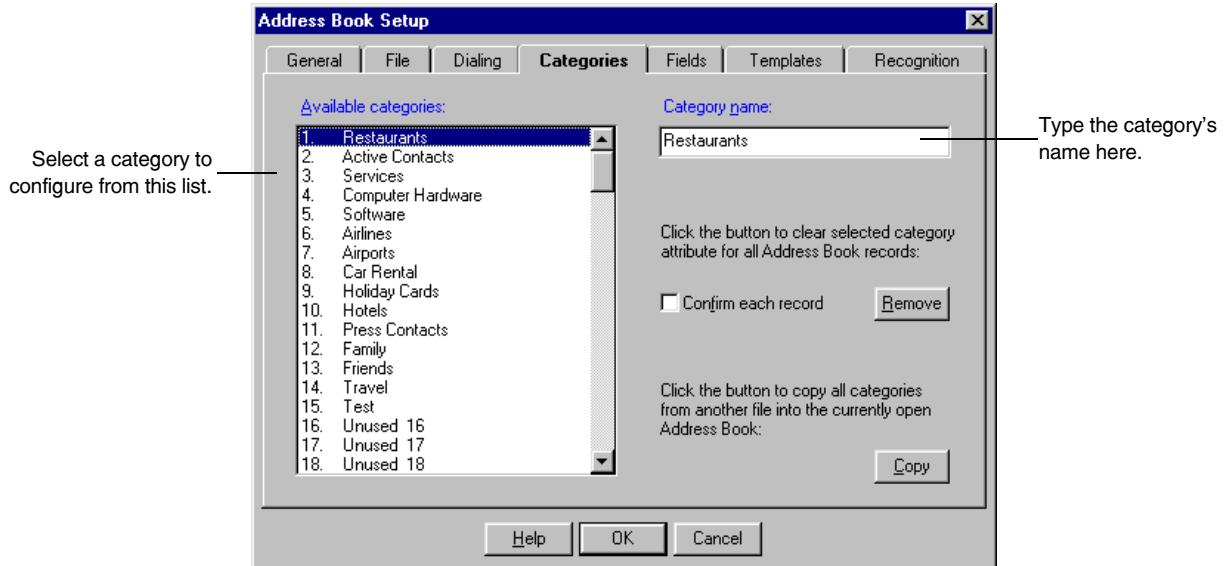
Create up to 128 categories. Click any category to change its name.

To create a new category:

♦ Select one of the *Unused* categories from the list.

♦ In the *Category name* field, replace the *Unused* description with a category name of your choice.

♦ Select another *Unused* category and repeat, **or…**

♦ Click the **OK** button when finished.

You may also edit the names of existing categories this way.

Copying categories from other books

You can copy the entire category list from one Address Book into another. Do this only if you do not have any categories defined in the current book, as it overwrites any existing categories.

To copy categories from another Address Book:

♦ Click the **Copy** button to open the *Select File* dialog box.

♦ Select the file name and click the **OK** button.

♦ Click the **OK** button when finished.

All the categories from the selected file are copied into your currently open Address Book.

Deleting categories

Be aware that all entries previously assigned to the deleted category will still be assigned to the *Unused* category. It is a good idea to remove entries from a category before deleting the category.

To delete an existing category from the list:

♦ Select the category from the *Available categories* list.

♦ Click the **Remove** button.

User Fields

You can create up to thirty-two customizable fields. They can be used for information not included in the standard fields, such as *College*, *Nickname*, *Favorite Restaurant*, *Last order quantity*, etc.

To set up user fields:

♦ Select the **File/Setup...** command.

♦ Click on the *Fields* tab.

Select the user field you want to define.

Enter the field's name, the select a type and merge field here.
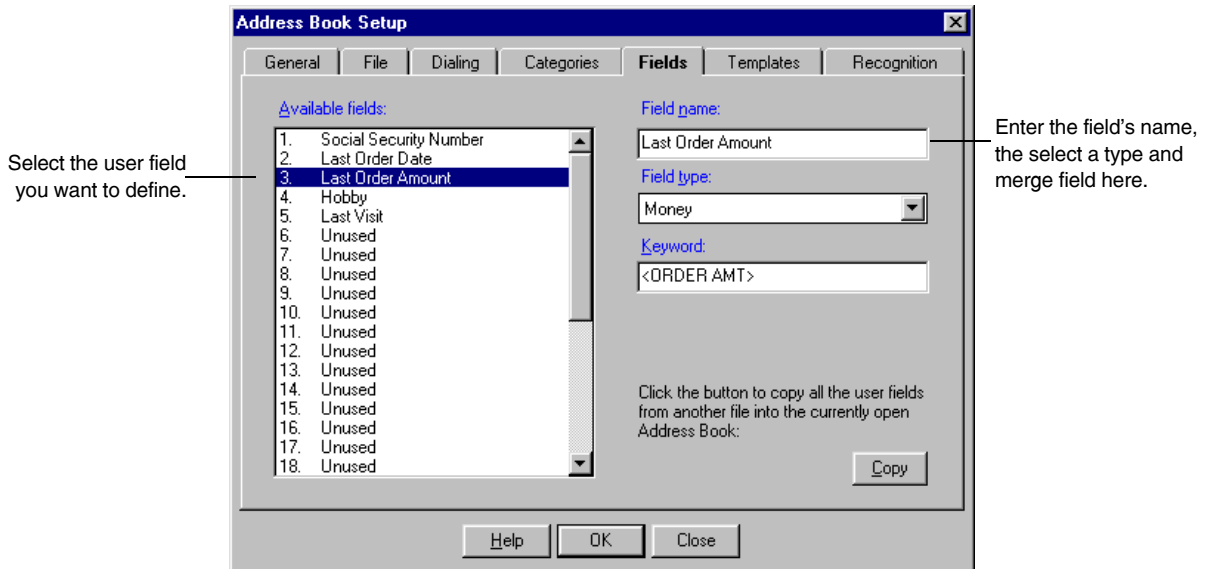
Address Book has thirty-two customizable fields.

Available fields — Lists all assigned fields as well the remaining unused fields. Highlight a field to assign or edit it.

Field name — This shows the name of the selected field. If it is unused, this will be empty. The field name is used as a label when you are viewing/editing the user fields in a folder.

The ampersand (&) character should be placed in front of the letter that you want to be the *hot key* for the field. This letter is underlined when that label appears in the *Custom information* dialog box.

For example, to create the label *Nickname*, you would enter "Nic&kname." The **Alt-k** key could then be used to move to that field.

Field type *Field Type* indicates the kind of information each field accepts, and how the information is stored in the database.

Option	Description
Text	Holds character information like letters, numbers, symbols, etc.
Money	*Stores* any monetary figure such as $25.86, $0.32 and so on. The "$" symbol is automatically placed at the beginning of a money field. If anything other than a valid monetary figure is placed in this field, it is reset to $0.00. Money fields can hold values up to one billion dollars ($1000000000.00). Do not use commas in money fields.
Numeric	Numeric fields can hold a number in integer (44), decimal (98.6) or scientific (3.0E8) notation. Number fields can hold values up to one billion (1000000000). Do not use commas in numeric fields. You can place invalid information (such as text) in a number field, but it is not printable.
Cumulative Money	This field is similar to a regular money field, but each time you place a new value in the field, it is added to a running total. The field displays the last value you entered, and the total is displayed in the label for the field.
Cumulative Numeric	This field is similar to a regular numeric field, but each time you place a new value in the field, it is added to a running total. The field displays the last value you entered, and the total is displayed in the label for the field.

Note: Be cautious when entering very large numbers (over 1 billion) in these fields. Windows rounds these numbers, and it does not always do so correctly.

Keyword Use this field to enter a descriptive keyword. This is used to represent the field when you define custom print formats or letter templates.

The merge field *must* be entered using capital letters enclosed in angle brackets (example: <MERGE FIELD>).

To set up a custom field:

♦ Click on one of the empty fields.

♦ Enter a field description in the *Field name* area.

♦ Select a type from the *Field type* combo-box.

♦ Enter a keyword in the *Merge field*.

♦ Select the next field to set up, or click **OK** if you are done.

You can copy all user fields from one address book into another. Only use this command if you do not have any fields defined in the current book, as it overwrites any existing fields.
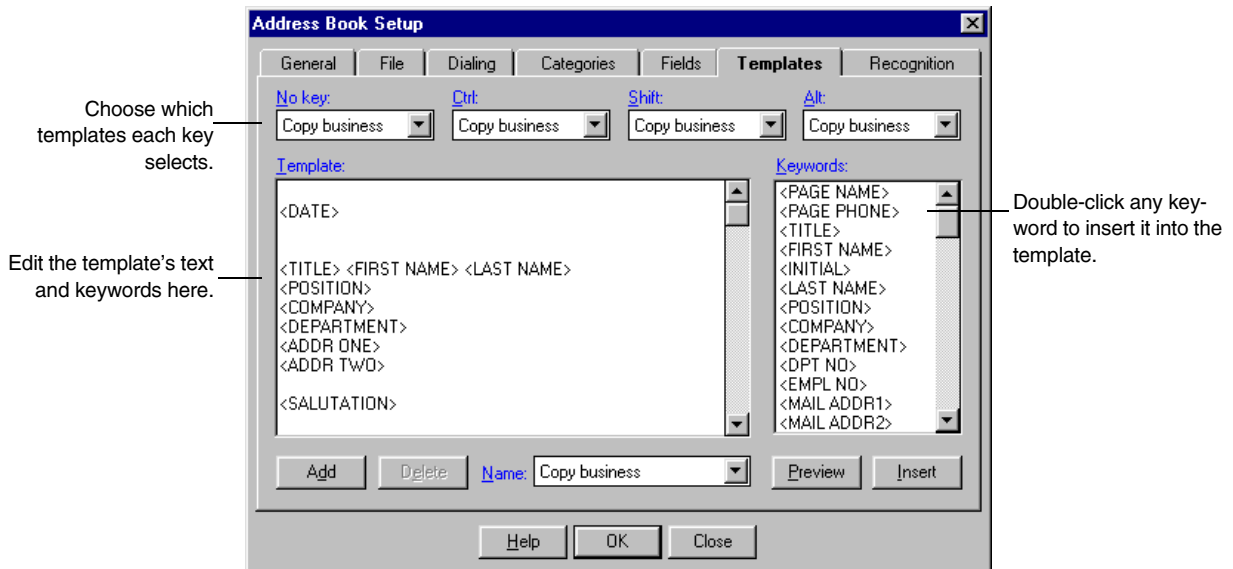
To copy user fields from another Address Book:

♦ Click the **Copy** button to open the *Select Address Book to copy user fields...* dialog box.

♦ Double-click the file name from which you wish to copy fields, **or...**

♦ Click once on the file name and click the **OK** button.

♦ Click the **OK** button when finished.

All the user fields from the selected file are copied into your currently open Address Book.

Once the custom fields have been defined, you can add or edit information in the folder's *User* tab.

Copy Templates

Address Book lets you transfer selected information to other programs by dragging and dropping, or through the Windows clipboard. The copy templates determine which information is transferred.

Choose which templates each key selects.

Edit the template's text and keywords here.

Double-click any keyword to insert it into the template.

You can create an unlimited number of copy templates, letting you transfer different kinds of information into various programs.

To edit copy templates:

♦ Select the **File/Setup...** command.

♦ Click on the *Templates* tab.

No key / Ctrl / Shift / Alt

The combo-boxes in this section of the dialog box define which template is used for the various copy commands or drag–and–drop operations. The default copy command is specified by the *No key* combo-box. This is the template that is used when you do a normal copy, without holding any keys. For example, in the dialog box above, *Business* information is listed in the *No key* combo-box. This specifies that the record's business fields (as defined by the accompanying *Template*) is copied into the application.

You can change the type of information that is copied by holding down the **Shift**, **Ctrl**, or **Alt** key when you copy. The corresponding combo-boxes specify which template is used when any of these special keys is held down during a copy.

Template

This is where you define the information to be copied. The template's keywords specify which information is copied, and how it is formatted.

You can create as many different templates as you like. To view or edit any of these templates, select it from the *Name* drop-down list.

Keywords

This list displays the available merge fields. Double-click any keyword to insert it into the template at the cursor's position.

Name

Select the template you wish to edit from this drop-down list.

Button functions

Command	Description
Add	Creates a new copy template.
Delete	Deletes the selected copy template.
Preview	Replaces template keywords with their related information from the currently selected record. This lets you preview the template while you are editing it.
Insert	Adds the selected keyword to the template text.

To create a new copy template:

♦ Click the **Add** button.

♦ Type the new template's name.

♦ Click **OK** to create the template.

Address Book comes with pre-defined copy templates. You may want to change these, or set up your own templates.

To edit the templates:

♦ Select the copy template that you wish to modify from the *Name* combo box.

♦ Place the cursor in *Template* at the position you want to add a merge field.

♦ Double-click on the merge field from the *Keywords* list.

♦ Type any label text you need to add.

♦ Delete any text you need to.

♦ Click **OK**, or select another copy template to save your changes.

Copying to the Clipboard

Information from your Address Book records can be copied to the Windows clipboard, then pasted into other programs. The pasted data assumes the format specified in the selected Copy template. This section gives examples based on the default copy key assignments.

Using the menus **To copy information from a selected record into the Windows Clipboard:**

♦ Select the desired folder or entry in Address Book.

♦ Choose the **Edit/Copy template** command**.** A sub-menu opens.

♦ Select the copy template you want to use from the sub-menu.

♦ Switch to the program you want to copy information to.

♦ Place the cursor where you want the information to appear.

♦ Select **Edit/Paste** from the program's menu.

Drag-and-drop method Address Book lets you use your mouse to drag an entry from the Address Book page to a Windows word processor or editor.

This method is more convenient than cutting and pasting, but you must position your windows properly. The Address Book window should be on top of the word processor window, but at least part of the word processor's window must be showing.

Versions of Microsoft Word for Windows before Version 6.0 do not paste the address information unless its **Edit** menu has been used at least once. When using the drag-and-drop method with Word for Windows 1.x or 2.x, use the **Edit/Paste** command to put the information in your document.

To drag-and-drop a record:

♦ Move the mouse over the desired entry.

♦ If necessary, press and hold the keyboard key that corresponds to the template you wish to use.

♦ Click and hold the left mouse button. The mouse cursor changes shape.

♦ While continuing to hold the left mouse button and the key, position the mouse over the word processor window.

♦ Release the mouse button, then the key.

If you are using Windows 3.1x, a slightly simpler method is to minimize the word processor or editor, then drag and drop the Address Book information onto the icon. It has the same effect. In both cases, information is pasted to the current cursor position, or at the end of the document. This particular method does not work in Windows 95, because it handles drag–and–drop differently.

Name Recognition

If you add an entry by typing a page name and page phone, then double-clicking to open a folder, the program analyses your page entry to determine whether it is an individual's name or a business name. If the application recognizes the name, it is placed into the appropriate dialog box field. If the name is recognized as male or female, the *Title* field is filled in appropriately with Mr. or Ms.

To determine individual's names, the program has a names table. There are about 500 male, female and generic business names in this table. You can add names to the table using the *Address Book Setup* window.

To open the names table window:

♦ Select the **File/Setup...** command

♦ Click on the *Recognition* tab.

To see if a name is in one of the lists:

♦ Highlight a *Male*, *Female*, or *Business* name.

♦ Type the name you are looking for.

♦ If the name is found in the corresponding list, it is highlighted.

To add a name to one of the lists:

♦ Highlight an entry in the list to which you want to add a name.

♦ Click the **Add** button. A *Name recognition* window appears.

♦ Enter the new name

♦ Click the **OK** button.

To remove a name from any of the lists

♦ Select the name

♦ Click the **Delete** button.

To save your changes:

♦ Select another tab, or click the **OK** button.

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