

# XMediusFax Phone Book

## Quick Start Guide

### Overview

**XMediusFAX** is the software solution for sending and receiving faxes from your computer. Once XMediusFAX is installed and configured on your SLCC computer you will have access to:

- XMediusFAX SendFax
- XMediusFAX Phone Book
- XMediusFAX Coversheet Editor
- XMediusFAX Phone Book

Refer to the [OIT Training web site](#) for other **XMediusFAX Quick Start Guides**.

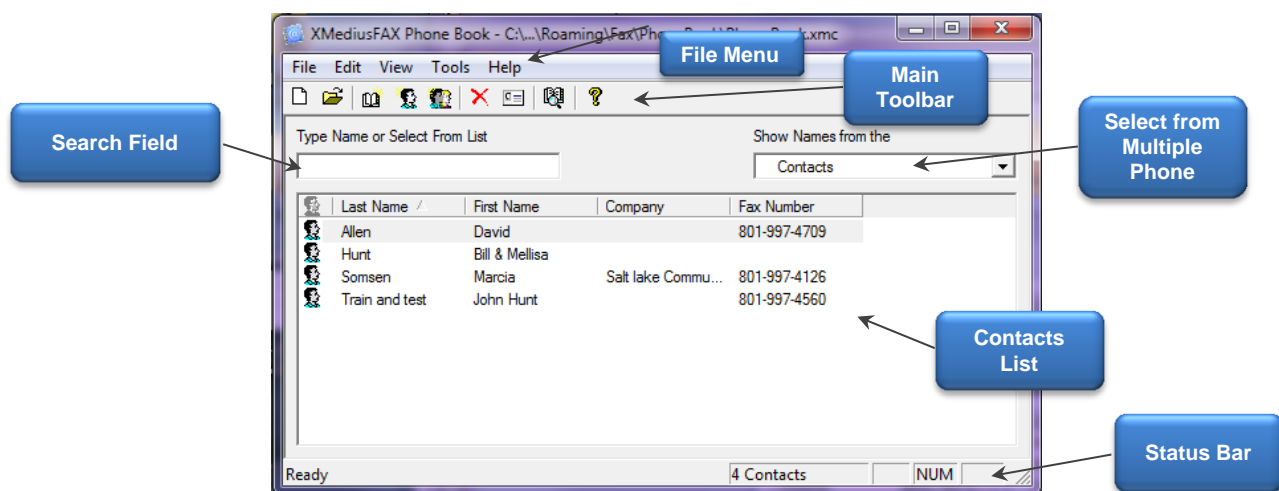
In addition, you will be assigned your own fax number for receiving faxes on your computer and when XMediusFAX opens, it will display a SLCC coversheet as the default.

A **Phone Book** is composed of at least one **Contact List**. A **Phone Book** can have multiple **Contact Lists**. Only one **Contact List** can be used at a time. A default **Contact List** named **Contact** is generated in a new phone book.

### Launching XMediusFAX Phone Book

Choose **Start Button** ➤ **Programs** ➤ **XMediusFAX** ➤ **Phone Book**.



### The XMediusFAX Phone Book Window





### Menu Bar Details and Associated Toolbar Icons

The following tables describe the items on the **Phone Book File Menu** and the **Menu Item's** associated **Toolbar** icon if available.

#### File Menu

Menu Item	Toolbar Icon	Description or Function
New		Allows you to create a new <b>Phone Book</b> , a new <b>Contact List</b> within an existing phone book, a new <b>Contact</b> in a contact list, or a new <b>Contact Group</b> .
Insert		Opens a <b>Navigation</b> window allowing you to navigate to an existing <b>phone book</b> or <b>contact list</b> .
Save As		Opens a <b>Save As</b> window allowing you to save a newly created phone book.
Import		Imports data from an external data source into a new or existing contact list.
Link		Links a phone book to an external data source.
Link Fields		Allows you to update the links that match the fields of an external data source to the phone book's internal fields.
Exit		Closes the <b>Phone Book</b> application.


## Edit Menu

Menu Item	Toolbar Icon	Description or Function
Properties		Displays the <b>Properties</b> of a selected contact or group.
Delete		Deletes a selected contact, group, or contact list.
Select All		Selects all contacts in the currently displayed contact list.

## View Menu

Menu Item	Toolbar Icon	Description or Function
Display Name		Switches the order in which names are displayed.
Tool Bar		Toggles on or off the <b>Toolbar</b> at the top of the phone book window
Status Bar		Toggles on or off the <b>Status Bar</b> at the bottom of the phone book window.
Languages		Select from a list of available languages in XMediusFAX.

## Tools Menu


Menu Item	Toolbar Icon	Description or Function
Find Contacts		Opens the <b>Find Contacts</b> dialog box to search for contacts.
Advanced Find		Opens the <b>Advanced Find</b> dialog box which provides more detailed contact search criteria.
Contact List Management		Provides tools for renaming, editing, and deleting the <b>Contact Lists</b> already present in the phone book.
Compact Database		Compacts or compresses the phone book database.

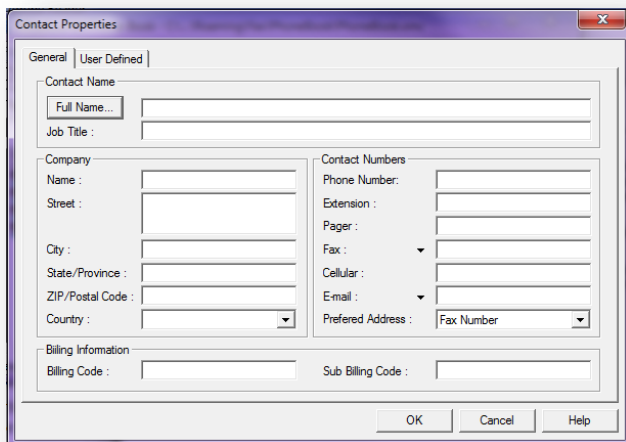
## Managing Phone Books

### Managing Contacts

#### Creating Contacts



The procedure for creating a **New Contact** is as follows:



1. Launch **Phone Book**.
2. Select **File > New** or click . This opens a blank, **Contact Properties** dialog box.



3. Enter needed contact information.


4. *Optional:* Click on the **Full Name...** button to enter a **Title**, i.e. Mr., Miss, Dr., etc.

 **Note:** Up to three **Fax** numbers and up to three **E-mail** addresses are available by clicking the  button at the **Fax:** and **E-mail:** field. The **Preferred Address** field allows you to select the one that **SendFAX** will use by default.


 **Note:** Add a recipient in the **Fax Recipients** list to your **XMediusFAX Phone Book** by selecting the **Phonebook** (see step 1), select the recipient, and click .

#### Deleting Contacts

To delete a contact(s):

1. Select the contact to delete.
2. Click the **Delete** button .

#### Editing Contacts


1. Select the contact to edit.
2. Click the **Contact Properties** button .
3. Make changes in the **Properties** dialog box and click **OK**.


## Phone Book Groups

A group is composed of a number of individual contacts and, possibly, other groups. By selecting a group when faxing, you fax to all contacts in it. A contact list can include any number of groups.

### Adding a Group


To add a group:


1. Select **File > New > Group** or on the **Toolbar** click .
2. In the **Group Properties** dialog box, name the new group.
3. Click the **Select Members** button to choose contacts from existing lists.
4. Click the **Add New** button to create a new contact for the group.
5. Click **OK** to save the group.

 **Note:** Add an existing group to the new group by selecting the group from the contacts list.

### Deleting a Group


To remove a group:

1. Open the **Contact List** that contains the group and select the group.
2. Click the **Delete**  button.

 **Note:** Contacts are listed as individuals and as group members. Deleting a group does not delete a contact's individual listing.


## Importing an External Data Source

External **data sources** can be imported into a phone book, either as a new contact list or into an existing contact list.

 **Note:** Column headings in the data source should match exactly the corresponding columns used by the phone book.

While many data sources can be used, this example imports information from an **Excel** worksheet.

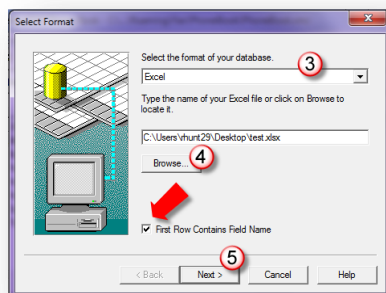
1. In the **Phone Book** window, choose **File > Open** to select the correct phone book.


 **Note:** If necessary, use **Show Names from the** to select the correct contact list.

2. In the **Phone Book** window, choose **File > Import**.

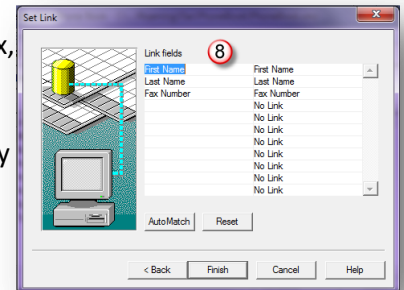
3. In the **Select Format** dialog box, use **Select the format of your database** to select **Excel**.


4. Click **Browse** to navigate to the data file, select it, and click **OK**.



 **Note:** Click **First Row Contains Field Name** if the first row of the spreadsheet represents the field names or column headings.

5. Click **Next**.
6. In the **Select Table** dialog box, select the worksheet that contains the contact information.
7. Click **OK**.
8. In the **Set Link** dialog box, check that **Column Names (Linked Fields)** are correct. If not, it may be necessary to change column names in the data source.
9. Click **Finish**.



 **Note:** Depending on the size of the data source, the import could take several minutes.