



Using Contacts



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If further help is required please contact the CJSM Helpdesk on 0207 604 5598 between 08:00 and 19:00 Monday to Friday, or email: cjsm.helpdesk@egress.com.

Return Address: The CJSM Administrators, Egress Software Technologies Ltd, The White Collar Factory, 1 Old Street Yard, London EC1Y 8AF.





Using Contacts

This section provides details of common tasks carried out to maintain your contacts.

Introduction

In this section, we'll tell you how to:

- View contacts by their surname or category or view group members.
- Create new contacts and add them to your personal address book.
- Create, edit and delete groups and categories of users.
- Update a contact's personal details, including their address and phone number.
- Give a contact a short name or display name.
- Send an email from the '**Contacts**' screen.

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1.1 Contacts: View

To view all contacts:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Contacts are stored in groups. Select a group name to expand it and view the contacts.
- Select a contact to see more details about a particular contact.

To view group members:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- The list of groups in your personal address book is displayed on the left-hand side.
- To view the contacts in a group, select the group from the list. The contacts will be displayed in the '**Contacts**' list.

1.2 Contacts: Create / Add

To add a new contact to your personal address book from an existing email:

- From the **Inbox** screen, select the email from the sender you wish to add to your address book. This will display their message.
- Next to the sender's email address, click on '**Add to address book**' icon.
- This will save the contacts to your personal address book.

To create a new contact:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Click on the '**Create new contact**' icon (+) at the foot of the **Contacts** column.
- This will open the '**Add contact**' menu.
- To create a new contact, enter details of their first name, last name and email address.
- Click on '**Save**' to save the details you have entered.
- If you wish, you can enter more detailed information for the contact, including their address and telephone number. Use the tabs to also add **Personal Information** and **Notes** to the contact.

To create a new group:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Click on the '**Create new group**' icon (+) at the foot of the **Groups** column.
- This will open the '**Create new group**' message box.
- Give the new group a name and click on '**Save**'.

1.3 Contacts: Edit

To edit a contact's personal details:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact whose details you are looking to change.
- Select the contact and then click on the '**Edit contact**' button to enter the '**Edit contact**' view.
- You can edit the contact's details here, including first name, last name, email address and other personal information. It is also possible to add new information, including notes.
- Once you have added or amended the relevant information on any page, click on '**Save**' to save your changes before moving on.

1.4 Contacts: Delete

To delete a contact from your personal address book:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact you wish to delete.
- Select the contact in the **Contacts** list, then click on '**Delete selected contacts**' icon (x) at the foot of **Contacts** list.
- Click on '**OK**' to confirm the deletion when prompted by a message box.

Please note: this will delete the contact from your personal address book and any group it is in.

To delete multiple contacts from your personal address book:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contacts you wish to delete.
- Select the contacts in the **Contacts** list, holding the Control key to select multiple contacts. After selecting all of the contacts you wish to delete, click on '**Delete selected contacts**' icon (x) at the foot of **Contacts** list.
- Click on '**OK**' to confirm the deletion when prompted by a message box.

Please note: this will delete the contacts from your personal address book and any group they are in.

To remove a contact from a group:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- If you know the group the contact is in, select the group from the **Groups** list and find the contact in the **Contacts** list. Click on '**Remove selected contacts from group**' icon at the foot of **Contacts** list.
- If you do not know which group the contact is in, search for the contact using the search bar, then select the contact from the search results.
- In the **Contact properties** view that appears, go to the **Groups** tab. Existing groups are displayed. Use the switches next to each group to add or remove the contact from the respective group. The contact will be removed immediately from the group.

1.5 Contacts: Manage / Organise

To add a contact to an existing group:

Please note: you can only add a contact to a group if they are in your address book.

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact you wish to add to a group.
- Select the contact to open the '**Contact properties**' view.
- Go to the **Groups**.
- Existing groups are displayed. Use the switches next to each group to add or remove the contact from the respective group. The contact will immediately be added to the group.
- If you want to add more contacts to the group, repeat this process.

To rename a group:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Navigate to the group whose name you wish to change.
- Select the group and then click on '**More actions**' icon at the foot of the **Groups** column.
- In the menu that appears, select '**Rename group**'
- Enter the new name in the '**Name**' field of the message box that appears, then click on '**Save**'.

To export a set of contacts:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Select a contact group, or multiple contacts (by holding down the control key while selecting the specific contacts)
- Click the arrow next to the '**Export**' icon and choose '**Export selected**'.
- Alternatively choose '**Export all**' to export all contacts in your address book.

1.6 Contacts: Options

To give a contact a display name:

When composing emails, you can use a display name instead of typing in the contact's full email address:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact you wish to give a display name.
- Select the contact from the **Contacts** list to open the **Contact properties** view. Click on '**Edit Contact**'.
- Under the first name and last name fields, click on the '**Add field**' drop down and choose '**Display Name**'.
- Enter a display name to use for the contact. Click on '**Save**' to confirm the name.

To record a contact's postal address:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact to which you wish to add details.
- Select the contact and then click on '**Edit contact**' button to enter the '**Edit contact**' view.
- In the '**Properties**' tab of the '**Edit contact**' view, find the '**Address**' section and enter the contact's address details in the appropriate fields.
- Click on '**Save**' to save the details you have entered.

To record a contact's telephone or mobile phone number:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact to which you wish to add details.
- Select the contact and then click on the '**Edit contact**' button to enter the '**Edit contact**' view.
- In the '**Properties**' tab of the '**Edit contact**' view, find the '**Phone**' section enter the contact's address details in the appropriate fields.
- Click on '**Save**' to save the details you have entered.

To record personal details for a contact

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact to which you wish to add details.
- Select the contact and then click on '**Edit contact**' button to enter the '**Edit contact**' view.
- In the '**Personal information**' tab of the '**Edit contact**' view, enter the contact's personal details in the appropriate fields. Use the '**Add field**' drop-down menu to include additional details.
- Click on '**Save**' to save the details you have entered.

To compose an email to a contact, from the '**Contacts**' screen:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact to which you wish to send an email.
- Select the contact in the '**Contacts**' column to open the '**Contact properties**' view.
- You can compose an email to a single contact in one of two ways. Either click on their email address in the '**Properties**' tab of the '**Contact properties**' view, or click on the '**Compose**' icon on the toolbar on the top left of the interface.
- Either of these actions will bring up a new **Compose** screen with the address for the contact you selected in the '**To**' field.
- Give your email a subject and type your email message.
- When you have finished, click on '**Send**'.

To compose an email to multiple contacts, from the '**Contacts**' screen:

To compose an email to a contact, from the '**Contacts**' screen:

- Select '**Address Book**' from the toolbar on the top right of the screen.
- Use the **Groups** list or the search bar to locate the contact to which you wish to send an email.
- Select multiple contacts by holding down the Control key and selecting each contact in turn.
- Click the '**Compose**' icon on the toolbar on the top left of the screen.
- This brings up a new **Compose** screen with the addresses for the contacts you selected in the '**To**' field.
- Give your email a subject and type your email message.
- When you have finished, click on '**Send**'.