Overview

The Phone Book pane is a contact management tool that works in conjunction with several MITvoip features. You can use the phone book to enter contact information, capture information from your call lists or voice mail, dial calls, send an email with a single click, and more.

Note: The Phone Book is not currently integrated with the MIT People directory and includes only MITvoip users. It is primarily intended to create shortcuts for use with MITvoip Console tools (e.g., drag-and-drop a number to add it to a conference call).

Opening the Phone Book Pane

1. Access the MITvoip Console.
2. Click on the Phone Book title bar, located in the left column.
   Result: The Phone Book pane will open.

About the Contacts Lists

There are two contacts lists in the MITvoip Console: personal and corporate. You can access them by clicking on their tabs in the Phone Book pane.

Use the MITvoip corporate directory to assign groups and speed dials to other MITvoip users. This list is not currently integrated with the MIT People directory and includes only MITvoip users. It is centrally maintained, and you cannot edit most of the fields. If a phone number appears in the corporate directory, you cannot add it to your personal directory.

You can use the personal contacts list to add entries for people who are not in the MIT corporate list. For these entries, you can edit any field (home phone, mobile, mailing address, email, etc.). However, these entries are not updated automatically, so you must edit them if there are changes.

Viewing the Contacts Lists

- In the Phone Book pane, click either the Personal or Corporate tab.
- Use the scroll bar to move through a list.
- Click on a contact's name to see more information, including home and mobile phone numbers, mailing addresses, and notes.
- If there is more than one page of contacts, click the left and right arrows to go forward and back in the list. A dark arrow indicates that there are additional pages in that direction. A grey arrow indicates that there are no additional pages.
Adding a Contact

1. Open the Phone Book pane.
2. Click on the Personal tab if it is not the currently active tab.
3. To add a contact, click the Add New button.
   
   **Shortcut:** To copy a number from a voice mail message or a call list, click a contact's name in the My Calls pane or the VoiceMail pane.

   **Note:** When you copy a contact from a voice mail message or the call list, the system searches for that number in the contacts lists. If it finds a match, it will open the existing entry instead of creating a new entry. If you want to create a new entry anyway (to add an MIT employee to your personal list, for example), use the Add New button and type the name and number manually.

4. A new Details window will open. If you have chosen a contact from the My Calls or VoiceMail pane, the name and phone number will fill in automatically.

5. Use the pull-down lists to assign the contact to a group or a speed dial star code.

6. Complete the rest of the information you want to record in the fields:
   - Click on a field to enter a value. Use the tab key to advance to the next field.
   - Use the scroll bar to see fields that are not currently visible.
   - To record additional phone numbers or mailing addresses, click on the title bars for the Phone Numbers and Addresses fields.
   - Always enter full 10-digit phone numbers with no dashes. For overseas numbers, enter 011, the country code, and the number.
   - You do not have to complete all of the fields. Some features (including drag-and-drop dialing and one-click email) require that there be at least one phone number or email address listed for a contact.

7. Click on a radio button to choose a primary phone number for this contact. This is the default number used when you dial from the phone book.

8. Click the Save Changes button to save the contact in your phone book. Click the Cancel button to discard the new entry. Result: The new contact will now appear in your personal phone book list.

Defining Calling Groups

Group labels work in conjunction with other features, particularly Forwarding Calls by Group and Filtering Calls. With these features, you can set different call routing and filtering options for each group. To use them, you must first define one or more groups.

1. Open the Phone Book pane.
2. Click a name on either the Personal or Corporate contact list. Result: The Details window will open.
3. At the top of the General pane, select a group from the Calling Group pull-down list. The groups available are:
   - None
   - VIPs
   - Family
   - Friends
   - Refuse (see Filtering Calls for more information)

4. Click Save Changes. Note: Be sure to put all contacts that you want to route the same way in the same group.

Editing a Contact

1. Open the Phone Book pane.
2. Find the contact you want to edit and click the person's name. Result: The Details window will open.
3. Edit the fields you wish to change.
4. Click the Save Changes button to save your edits. Click the Cancel button to leave the record as it was.

Deleting a Contact

1. Open the Phone Book pane.
2. Click on the Personal tab.
3. Mouse over the contact you want to delete. Result: A red X will appear on the right.
4. Click the X to delete the contact.

Searching the Contacts Lists

The search functions are located at the top of the Phone Book pane.

- For a basic search, type the name in the search box and click the Search button.
- For an advanced search, click the Adv button. Enter your search terms and click the Search button.

In the example below, there was one result in the personal contacts and no results in the corporate contacts, as shown by the numbers on the tabs.

- Click on the tab to see the results for each list.
- To show the entire list again (instead of just the search results), click on the Display all personal contacts or Display all corporate
Sorting Contacts

In the Phone Book pane, you can sort an entire contact list or just the results of a search.

- Click on a category name to sort by that category (Name, Phone Number, Group, etc.).
- Each time you click on a category name, you will toggle between ascending and descending order. An up or down arrow will indicate which category is sorted and whether it is ascending or descending.

In the example above, the contacts are sorted by name in ascending order.

Sending Email to a Contact

To send an email to a contact, the Work Email field must be completed in that contact's entry.

1. Open the Phone Book pane.
2. Mouse over the contact's name.
3. Click on the Envelope icon for that contact.

Result: A new email message will open, addressed to the contact's work email.

Note: If no envelope icon appears, then there is no work email for that contact. Edit the entry to add an email address.