SBook:

Simson Garfinkel's Address Book

Version 3.0

Program by Simson Garfinkel

Icons and documentation by Orca Starbuck

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Preface

What is SBook?

SBook is Simson Garfinkel's Address Book. As a reporter, Simson seemed to be spending his life talking on the phone and sending mail. He had a desperate need for a fast, simple address book application that dialed the phone, kept track of whom he called, and made it easy to take and keep notes. So he wrote SBook.

- SBook searches quickly for the person you want to contact,
- sends email and dials the phone,
- prints envelopes, mailing labels, and address books,
- and logs everything you do.

But SBook isn't just an address book with a lot of nice features. You can think of SBook as a *smart* address book because:

- SBook can recognize names, addresses, and phone numbers,
- knows how to dial your phone, using the dialing rules in your local calling area,
- and knows the difference between people and companies by looking at the name.

You don't have to type your address book entries in a rigid form. Instead, you can type them in a natural way, including as much extra information and comments as you like. SBook uses artificial intelligence technology to make sense of the information you type into it, so that it can handle that information much as a person would.

You can even use SBook as a general-purpose *free-form database* to store any text that you can organize by name or title. For example, you could store your favorite recipes in an SBook file. The only things you can't store with SBook are multimedia objects containing sounds, pictures, or other files.

How to use this manual

First, you'll need to install SBook on your system. Read ''Installing SBook'' in *Installing and Licensing SBook* to find out how to do this. When you have installed and licensed your copy of SBook, read Chapter 2, *Getting Started with SBook*, for an overview of what SBook does and how to use it.

You may want to have an open SBook file to play with while you read Chapter 2. We recommend the "developers.sbook" file included in the SBook distribution; this is the file we use in most of our examples throughout the manual. It contains a list of all the developers listed in the *NeXT Software and Peripherals Catalog* for Winter 1992.

What you should know

We assume that you are familiar with the standard NeXT user interface concepts, such as using the mouse (clicking, dragging, and double-clicking), using windows, menus, scroll bars, standard panels such as the Font, Colors, Open, and Save panels, and using standard applications such as Edit and Mail.

If you are new to the NeXT and are unfamiliar with these concepts, we recommend that you refer to two of the manuals that were included with your NeXT computer: *NeXT Setup and Tutorials* and *Next User's Reference*.

Conventions we use

We use **boldface** for menu choices, buttons or other objects that you click on, or menu equivalents like **command-b**.

We use *italics* for the first time something is defined, and for emphasis.

We use quotes for file and directory names (like "~/Library/Information.sbook").

We use case when we specify menu equivalents; that is, we use **command-n** and **command-N** rather than **command-n** and **command-shift-n**.

We use two formats for specifying the use of menus:

- "Go to the **Info** menu and choose **Preferences**"
- "Choose **Info>Preferences**"

Both of these put the first menu choice first, which we hope you will find more natural than the standard NeXT format, "Select **Preferences** from the **Info** menu."

What's in the manual

Chapter 1, *Installing and Licensing SBook* explains about your license agreement and how to set up and license this copy of SBook.

Chapter 2, *Getting Started with SBook* gives an overview of what SBook is and what it can do for you. You'll probably want to read this first.

Chapter 3, *Fine-Tuning Your SBook Files* explains how to make your SBook files suit you and your data perfectly.

Chapter 4, *Using Telephone Numbers* explains how to set up and use SBook for dialing the phone and sending faxes.

Chapter 5, *Using Postal and Email Addresses* explains how to use SBook to print envelopes, send email, make bulk email mailings, and print address books and mailing labels.

Chapter 6, *Managing your SBook files* explains how to use SBook files and how to convert files into and out of SBook's file format.

Chapter 7, *Logging what you do with SBook* explains how to use SBook's logging facilities to keep records of your letters and telephone calls.

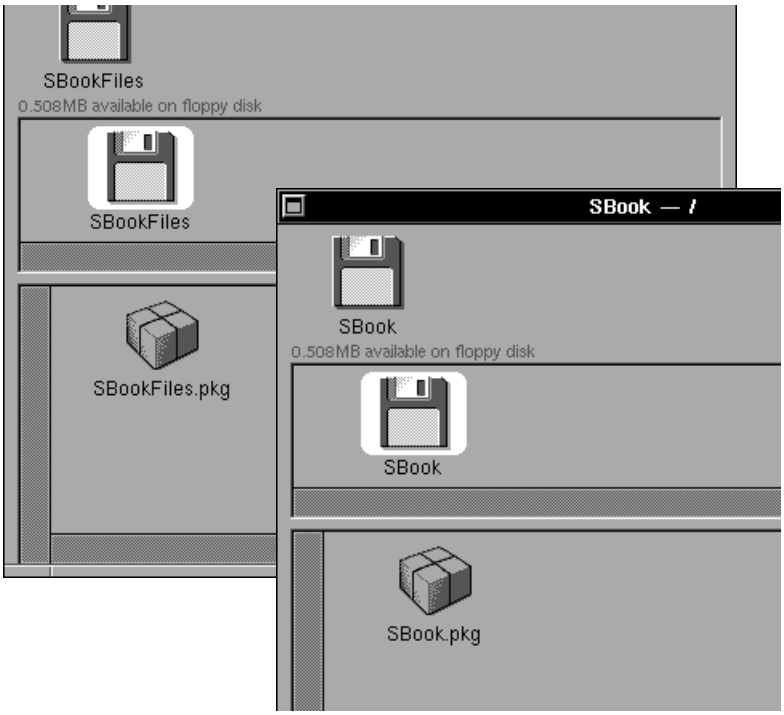
Appendix A: SBook's Menus and Menu Commands gives a complete, systematic overview of SBook's menus and windows and what they do.

1

Installing and Licensing SBook

Installing SBook

SBook is distributed on two disks. One disk contains the SBook application itself, and the other contains a collection of demo files.



To install SBook, insert the SBook application disk into your disk drive. You should see a package labeled “SBook.pkg.” Double-click on the package to start installing SBook. The installer application will launch, displaying a panel entitled “SBook” and the SBook icon.

Click the Install button in the upper left corner of the panel. A browser will appear for you to select the directory in which you want to install SBook.

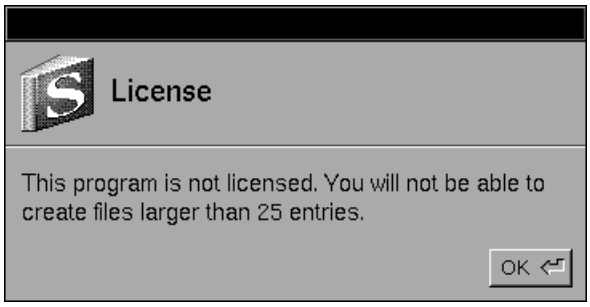
☞ You should install SBook in your machine's "/LocalApps" directory if this copy of SBook is to be used by all users of your machine, or in your personal "~/Apps" directory if this copy of SBook is only to be used by you.

After choosing a directory, you will see another panel allowing you to confirm your choice. If you are satisfied, click Install. The Installer will now install this copy of SBook in the location you have chosen. When installation is complete, quit the Installer application.

You can install the demo files that are included in the distribution in the same way. Insert the SBook demo file disk, and click on the package labeled "SBookFiles.pkg" to start the installation process. You can install the demo files anywhere you like. If you are the only person using this copy of SBook, you probably want to install them in a convenient place in your home directory. Or, if several people on your system are going to be interested in these files, you might want to put them somewhere public.

Registering this copy of SBook

When you start up SBook for the first time, you will see a warning panel:



Click on the button labeled **OK**, or press return. A large panel labeled **Registration Panel** will appear on the screen:

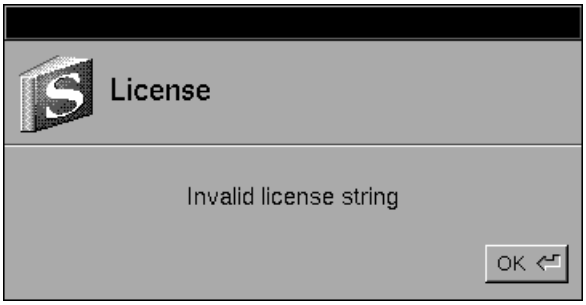
You will need to type your license string in the box provided on the Registration Panel.

- If you have purchased a regular single-user license or a site license, you will find your license string clearly marked on your *license card* (the bright-colored printed sheet of paper that was shipped with your disk and manual).
- If you have purchased a student license, you will have received your license string directly from us, by email, US Mail, or fax.

SBook automatically determines from the license string whether this is a single-user or network license. If it is a network license, SBook also determines how many simultaneous users this license authorizes. You don't need to enter any of this information — just enter the license string.

Below the license string, if this is a single user license, enter your name. If this is a network license, enter your company's name. Then click on **Register Program**.

If you have mistyped your license string, a panel will appear to inform you that the string you entered was not valid. Click **OK**. You will be returned to the Registration Panel so that you can try again.



When you have entered a valid license, you will see one of two alert panels, depending on whether the license string that you entered was purchased for a single user or for a network:

successfully licensed for a single user

for a network

Successfully registering a single-user license causes the license information to be written into your defaults database. The application itself is not changed. This allows you to use the application freely, but prevents other people from using it unless they have also obtained a license number from us. You can move or copy the application and still use it freely as long as you retain the licensing information in your defaults database.

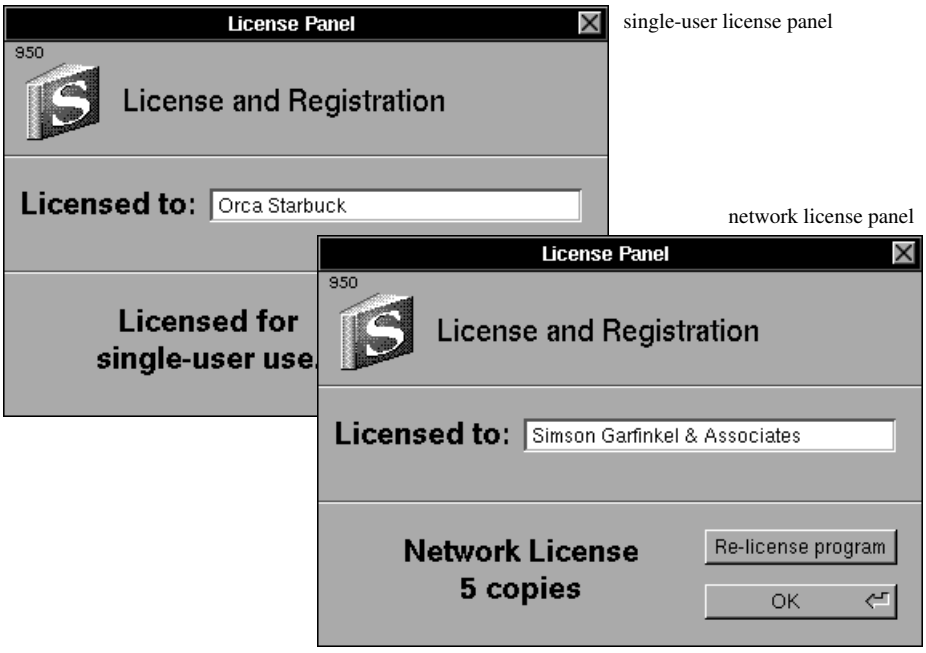
Successfully registering a network license, on the other hand, causes the installed copy of the application to be modified so that anyone may use it, up to the number of simultaneous users allowed by the license. This modification is called *branding*, which is why the panel announces that the application was "branded successfully." If a branded copy of SBook is moved or copied, it will cease to be branded, and you will need to re-brand it with the original license number.

You have now installed and licensed this copy of SBook. The rest of this chapter describes SBook licenses and license agreements in detail. You may want to read it now, or come back to it later for reference. If you need basic information on how to start using SBook, read Chapter 2, *Getting Started with SBook* now.

SBook Licenses

The License Panel

When you are using a copy of SBook, you can see who this copy of SBook is licensed to by looking at the **License** panel. Choose **Info>License...** to bring up the panel. (If the copy is not licensed, you will get the Registration panel instead. See Page 2 of this chapter.)

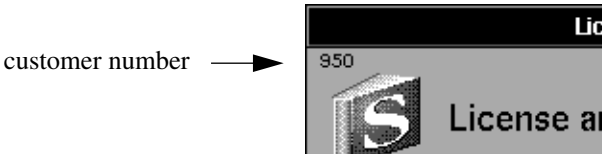


single-user license panel

network license panel

If this copy is licensed for a single user, the name of the person will appear. If it is licensed for a network, the name of the company will appear, along with the number of simultaneous users this license allows.

Besides the name of the person who licensed the application, the **License** panel displays the customer number of the person who bought the license. This allows us to track copies of our software.



Knowing your customer number does not make it possible for unauthorized individuals to determine your license string and use it to license software. *Your license string will never be displayed*. Nobody can learn your license string unless you release it to them.

Single user licenses

Successfully registering a single-user license causes the license information to be written into your defaults database. The application itself is not changed. You can move or copy the application and still use it freely as long as you retain the licensing information in your defaults database.

Your single-user license allows you to run SBook on only one computer at a time. You cannot run more than one instance of SBook, even if it is on the same computer. Other users on the same machine or network will be able to start up the program, but it will work as a demo version unless they have also obtained a license number from us.

Your license agreement allows you to make copies of SBook directly from your distribution disk, and give away as many copies as you like. *You are not allowed to distribute your license string*. The copies that you distribute will work as demo copies.

Network licenses

Successfully registering a network license causes the installed copy of the application to be modified so that anyone may use it, up to the number of simultaneous users allowed by the license. This modification is called *branding*, which is why the panel announces that the application was "branded successfully."

Licensed single users can use a branded copy of SBook without affecting how many other users can use it at once.

If a branded copy of SBook is moved or copied, it will cease to be branded, and you will need to re-brand it with the original license number. To rebrand a copy of SBook, you must have write access to the file. When you start up the copy, it will behave as though it has never been licensed, and you will have to go through the licensing process as described on Page 2 of this chapter.

Every site with a network license should have a designated contact person who is responsible for licensing and maintaining SBook. Only the contact person needs to know the license string, since it is only needed when the copy is initially branded or re-branded because it has been moved. *The license string should not be distributed among the users*.

Your license agreement allows you to make copies of SBook directly from your distribution disk, and give away as many copies as you like, as long as you do not brand them with your license string or modify them in any other way. *You are not allowed to distribute your license string*. The copies that you distribute will work as demo copies.

If your needs change, and you want to add more users to your license, you can always order a new license number by telephone or fax and add the additional users right away.

Requesting source code

You can request a copy of SBook's source code, free of charge, at the time you buy your software, or at any time thereafter, for as long as you remain a licensed user. If you request source code after you buy your software, there will be a nominal handling fee; contact us for more details.

In order to request source code, *you must first sign a special source code release agreement and send it back to us* by fax, or US Mail.

You will receive a complete copy of the source code, except for three files, which are supplied to you as object files: "parse_case.o," "parse_address.o," and "parse_company.o." These files contain the heart of SBook's parser. We don't provide code for these files because they are compiled with tools that are not widely available.

Once you receive your source code, you are free to modify the code and make additions, then recompile it to make copies of SBook for your own use. However, *neither the original source code, nor any recompiled copies of it, may be distributed to anyone.*

For more information about ordering source code or the specific terms of your source code agreement, contact us.

2

Getting Started with SBook

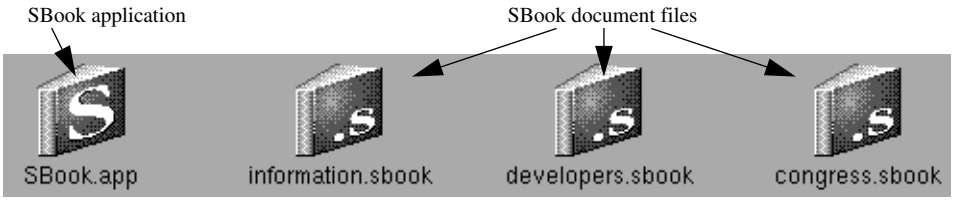
This section explains about SBook files, entries, and windows, and how to use the controls on SBook's main window to browse through the entries, search through the file, create and delete entries, and transfer groups of entries from one file to another. Unless noted, it assumes default settings.

☞ Before you can use SBook, it must be installed. See "Installing SBook" in *Installing and Licensing SBook* for more information.

SBook basics

SBook is a free-format flat-file database application. Each SBook document file can be thought of as a card file containing some number of cards. Or you can think of an SBook file as an address book.

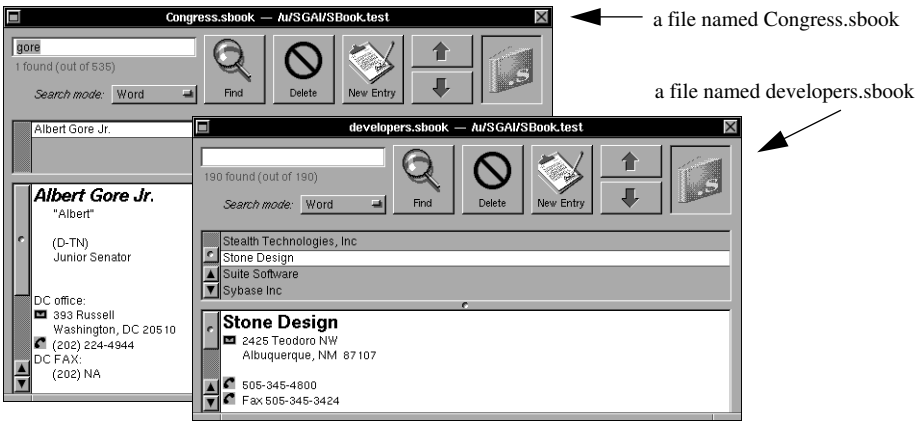
SBook allows you to have any number of different document files, as though you had several Rolodexes on your desk. SBook document files end in ".sbook" and appear in Workspace with distinctive icons, similar to the SBook application icon:



You can open an SBook document file by double-clicking on the file's icon in Workspace. If SBook is not running, Workspace will automatically launch SBook for you before opening the file.

☞ The example file used in this chapter is "developers.sbook"; you may want to double-click on this file now and keep it open while you read this chapter.

Each document file that is open within SBook appears in its own window. The name of the file appears at the top of the window:



The SBook main window has three major parts:

At the top of the window is the *control panel*. You can use the buttons and other controls on the control panel to browse through the entries, search through the file, create and delete entries, and transfer groups of entries from one file to another.

The *entry list* contains a scrollable list of names corresponding to the entries in the file (or some subset). Generally, the names in the entry list appear in alphabetical order.

When a name is selected in the entry list, its corresponding entry appears in the *display* below. The display is editable and scrollable so that you can view and change entries directly in the display.

An SBook file can contain any number of entries. When you use SBook as an address book, each entry represents a person or business. The name of the entry is the person's name, and the entry itself contains the person's contact information: postal and email addresses, phone numbers and fax numbers, and comments.

Simson Garfinkel & Associates
52 ½ Pleasant St.
Cambridge, MA 02139
617-354-7888
sbook@next.cambridge.ma.us

Some entries are short...

NeXT Computer, Inc.
900 Chesapeake Drive
Redwood City, CA 94063
415-366-0900
payables:
Betty Avanol
415-780-2923
123 Saginaw
Redwood City, CA 94063
orders:
Order Management
760 Mission Court
Fremont, CA 94539
1-800-848-6398
fax: 1-800-228-NEXT

...while others may contain much more.

SBook automatically places a small icon beside each postal address, email address, or telephone number in a displayed entry.

☞ For a discussion of how icons are inserted, and how to control icon insertion, see "Parsing and icon placement" in Chapter 3.

You can click on these icons to have SBook perform services for you:

- You can click on an *envelope icon* to print an envelope or mailing label with SBook. SBook brings up a fully editable print panel showing you exactly what the envelope or mailing label will look like, complete with bar codes if they are applicable. For more information, refer to "Printing an envelope or mailing label" in Chapter 5.
- You can click on an *email icon* to send email with SBook. SBook causes the Mail application to bring up a pre-addressed Send panel so that you can compose and send an email message. For more information, refer to "Sending a single email message" in Chapter 5.
- You can click on a *phone icon* to make a telephone call or send a fax with SBook. Depending on whether the number you choose is a voice number or a fax number, SBook either dials the phone for you, or allows you to compose and send a faxed message. For more information, refer to "Voice numbers and fax numbers" in Chapter 4.

Selecting and displaying entries

SBook provides several ways to browse through a file and view the entries in it.

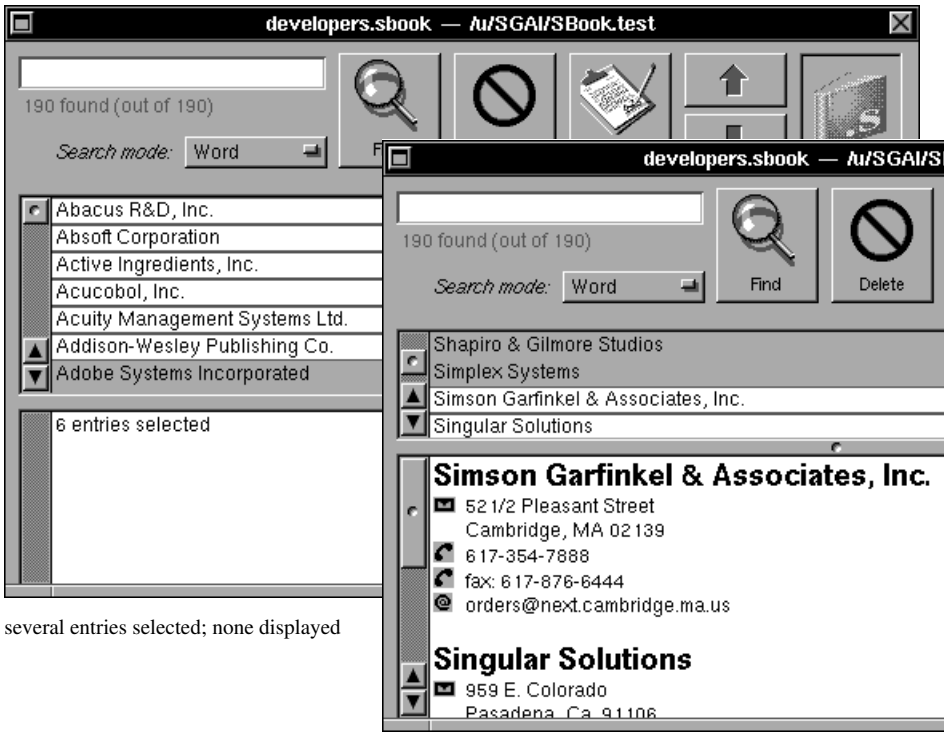
The simplest way is to use the entry list to scroll through the entry names, then click on an entry name to display the corresponding entry.

You can sequentially select and display entries by using the *next entry* and *previous entry* buttons. These are the "up arrow" and "down arrow" buttons on the control panel:

☞ Alternatively, you could move from entry to entry by using the "up arrow" and "down arrow" keys on your NeXT computer's keyboard.

You can select several entries at once by dragging the mouse across the names of the entries, or by shift-clicking on the names one by one. If more than just a few entries are selected at once, only the number of entries selected will be displayed. If only a few entries are selected, the entries will be shown in the display, but you may have to scroll the display to see them all.

☞ You can also use **Edit>Select all** (**command-a**) to select all of the entries in the entry list. If the entry list currently contains all of the entries in the file, all of the entries in the file will be selected.

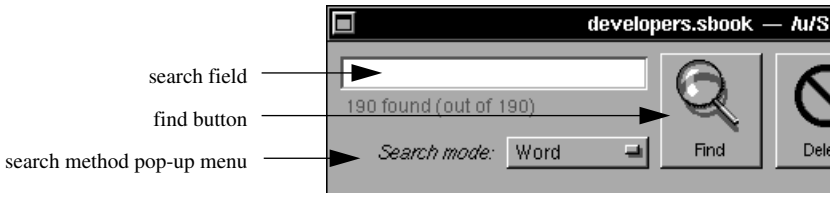


several entries selected; none displayed

two entries selected and displayed

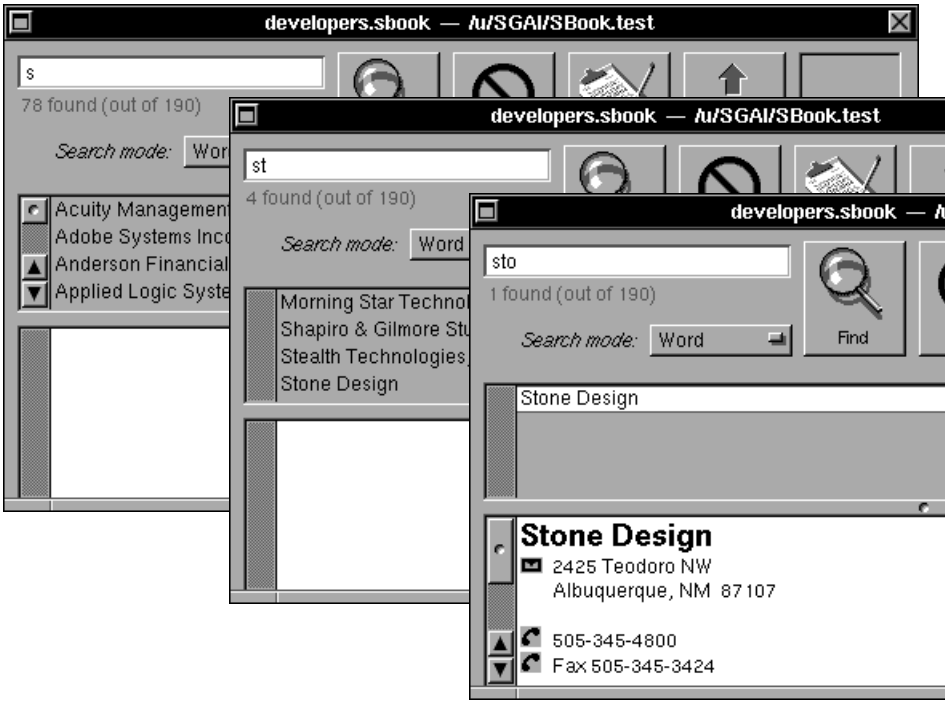
Searching

You can search through a file by using the controls on the left side of the control panel.



It's easy to search for a particular name in your SBook file. Just start typing in the search field. As you type, all the names that match what you have typed so far will be shown in the entry list, if there is room for them. If a lot of names match what you have typed, they will still appear in the entry list but you will have to scroll to see them all.

In the message field just below the search field, a number appears indicating how many names (out of the total number of entries in the file) currently match the search request. Only the matching names will appear in the entry list. If there is only one such name, it will be automatically selected, and its corresponding entry will be displayed. Otherwise, to display an entry, just select its name with the mouse.



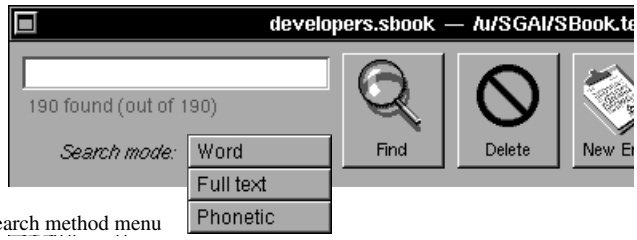
To start a new search, click on the **Find** button next to the search field. The search field will be cleared so that you can type a new search string.

☞ Another way to try a new search is to select all the words in the search field by choosing **Edit>Find** (**command-f**), or double- or triple-clicking on the search field. Then replace them by typing the new search string.

☞ You can also try a new search by backspacing through the search field after you have typed some text and narrowed the search to a few entries. Backspacing through the search field incrementally expands the search to the larger set.

Search methods

Just below the search field, on the right, there is a pop-up menu that allows you to choose between three different search methods: word matching, phonetic search, and full text search.



search method menu

The search method described above is the default method, *word matching*. Word matching is an incremental search in which the letters you type are used to match the beginnings of words. Words may appear in any order, and case is ignored. For example, all of the following search strings would match "Stone Design": "stone," "st de," "S D," and "d s."

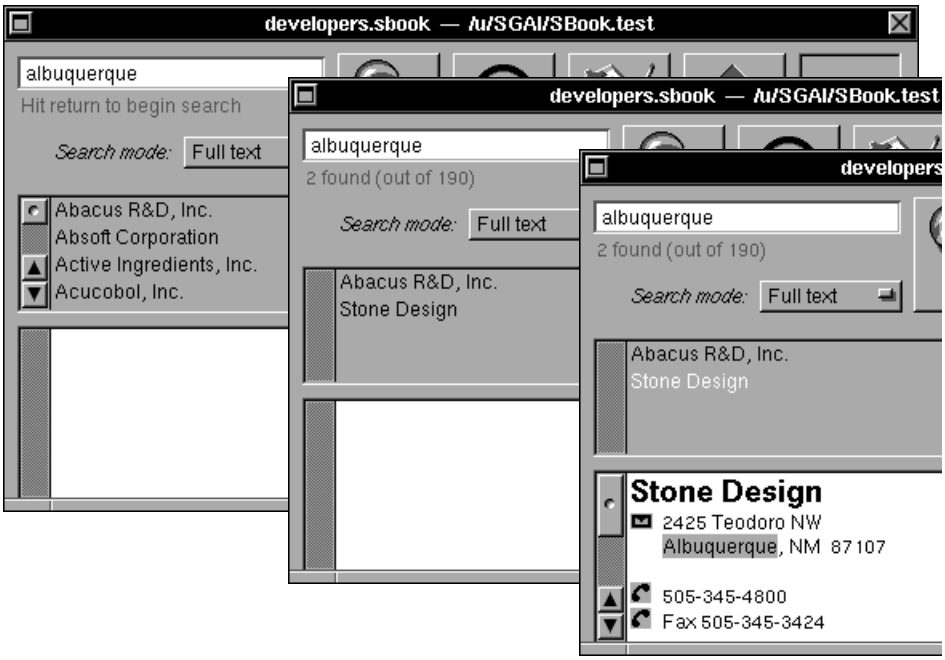
SBook provides another incremental search method, *phonetic search*. This works like word matching, except that each word is matched phonetically: "Lighthouse Design" could be found by typing "lite" as well as "light."

Full text search

SBook also enables you to make a *full text search.* When you select the full text option, instead of searching through the names of the entries only, SBook will search throughout the full text of each entry.

Because full text search takes a little longer than the name-only search described above, SBook does not search incrementally when the full text option is selected. *Press return or click on the **Find** button to execute each search while you are in full text mode.*

As an example, suppose I want to find all the software developers in Albuquerque. I select the full text option, type "albuquerque" into the search field, and press return. Two entries are found, so I select the one I am most interested in viewing:

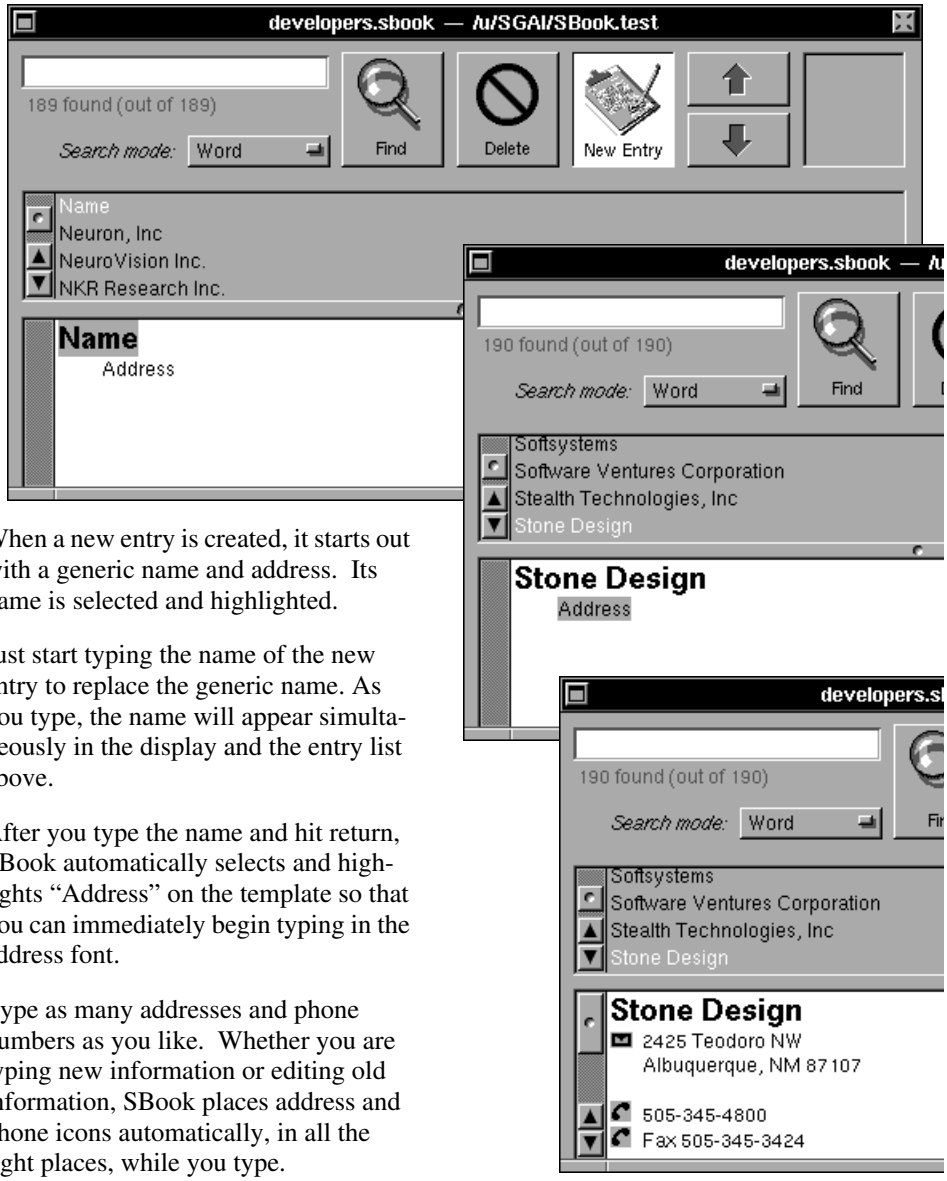


Note that the the text I searched for, "albuquerque," is highlighted in the displayed record.

Creating and deleting entries

You can create a new entry in an SBook file by clicking on the **New Entry** button, which is located on the control panel.

☞ Alternatively, you could use the menu command **Edit>Entry>New Entry**, or its keyboard equivalent **command-n**.



When a new entry is created, it starts out with a generic name and address. Its name is selected and highlighted.

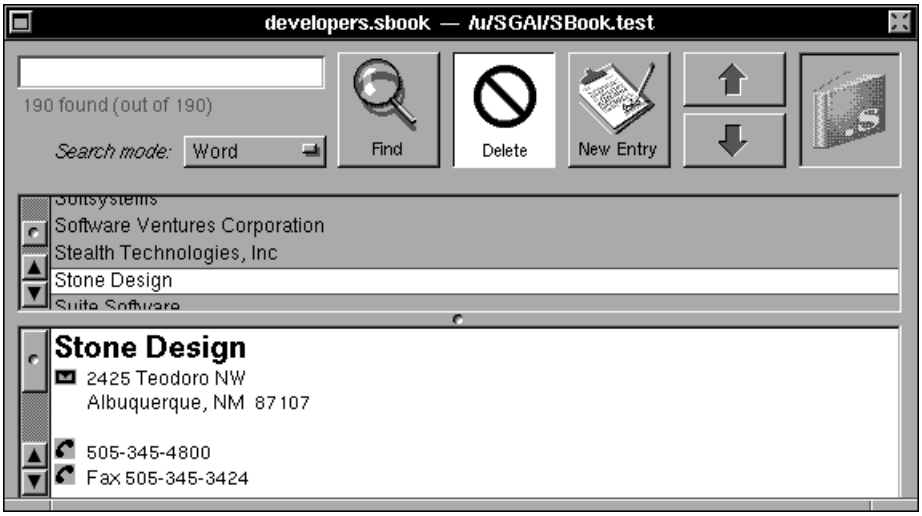
Just start typing the name of the new entry to replace the generic name. As you type, the name will appear simultaneously in the display and the entry list above.

After you type the name and hit return, SBook automatically selects and highlights "Address" on the template so that you can immediately begin typing in the address font.

Type as many addresses and phone numbers as you like. Whether you are typing new information or editing old information, SBook places address and phone icons automatically, in all the right places, while you type.

You can delete one or several entries from an SBook file by selecting the names of the entries that you want to delete in the entry list, and then clicking on the **Delete Entry** button, which is also located on the control panel.

☞ Alternatively, you could use the menu command **Edit>Entry>Delete Entry**, or its keyboard equivalent, **command-D**.



An alert panel will appear on the screen asking you to confirm that you really want to delete the entries.

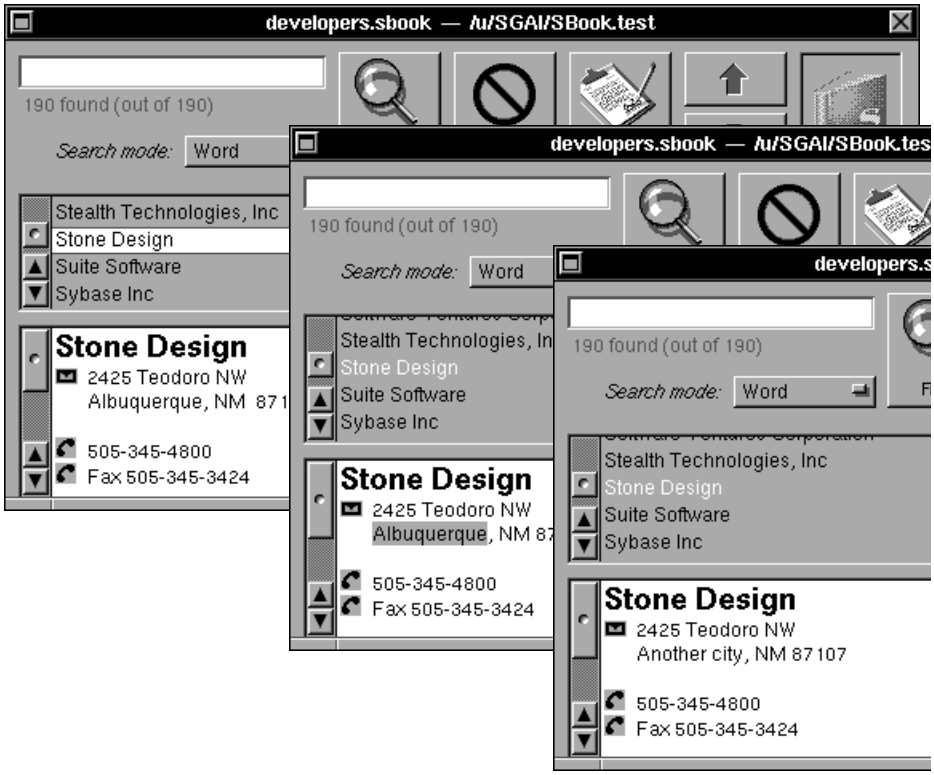
If there are several entries, the panel will warn you how many you are about to delete.

If there is only one entry, the panel will refer to it by name.

Click **Delete** (the default) to delete the entries, and **Don't delete** to cancel.

Editing an entr y

When you have an entry displayed, you can select and edit parts of it directly in the main window. For example, you could select a word and type over it to replace that word:



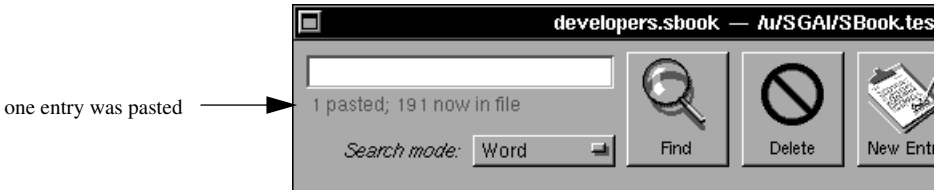
SBook supplies the standard **Edit** menu options **Cut** (**command-x**), **Copy** (**command-c**), and **Paste** (**command-v**). You can use these commands to copy and paste information within an entry, such as the word "Albuquerque," or to copy and paste whole entries.

In the illustration above, you can see that when part of an entry is selected, its name appears differently in the entry list. This is so that you can tell what will be cut or copied when you use the **Cut** or **Copy** commands:

- If the entry's name appears in black on a white bar, no part of that entry is selected, so *the whole entry* will be cut or copied.
- If the entry's name appears in white on gray, part of that entry is selected, so *only the selected section of text* will be cut or copied.

Copying and pasting whole entries

To copy and paste whole entries from one open SBook window to another, select the desired entry or entries, choose **Copy** or **Cut** in the usual way, click on the target SBook window, and then choose **Paste** in the usual way. The new entries will appear in the target window, and a message will appear informing you how many were pasted:



☞ Instead of using the **Edit** commands to cut, copy, and paste whole entries, you may want to use the export well. One reason to use the export well is that SBook will automatically check for duplicates as it imports entries. See "Transferring groups of entries" on Page 20 for more information.

Copying and pasting sections of text

Within SBook, copying sections of text from one entry to another works as you would expect it to: select the text you want to copy, choose **Copy** or **Cut** in the usual way, select an insertion point, and choose **Paste** in the usual way. The font and formatting will be preserved.

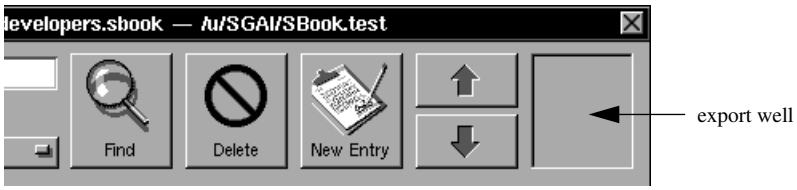
You can also copy sections of text from an entry into any other application, or vice versa. When pasting SBook text into a Rich Text field, font and formatting will be preserved, but icons will disappear. When pasting into a plain ASCII document (or an application such as WriteNow that does not support pasting of Rich Text) only the plain text will be pasted

☞ You can copy the information associated with an icon by shift-clicking on the icon. For example, if I shift-click on the icon next to Stone Design's address, then create a new Edit document and choose **Paste**, Stone Design's name and address will be pasted into the Edit document:

☞ Another way to copy and paste the text associated with an icon is to drag the icon out of the SBook file and drop it where you want to paste the text.

Transferring groups of entries

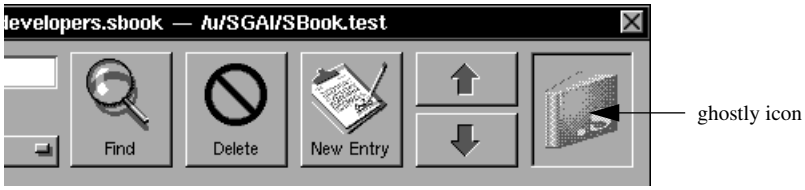
You can use the export well at the right of the SBook window to transfer groups of entries from one SBook to another, to send SBook entries in email, or to create new SBook files.



First, select the entries you want by clicking or dragging on their names in the matrix.

☞ You can also use **Edit>Select all** (**command-a**) to select all of the entries in the entry list. (This command does *not* select all of the entries in the file.)

When you have selected some entries, you will see a ghostly file icon in the export well:

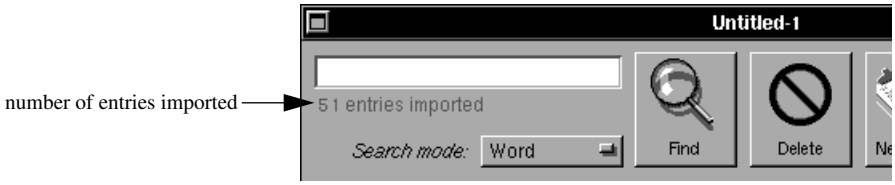


Clicking on this icon causes it to solidify into a new SBook file composed of the entries you have selected. *Only the selected entries are included, not all of the entries in the file.* You can drag the new file out of the export well and drop it into another SBook file, into Workspace, into a mail message, or into any other application that accepts drag-and-drop files.

To create a new file in a directory in Workspace or in a mail message, just drag the icon into the desired place and drop it there. A new file will appear:

This new file is just like any other SBook document file. The file's name is generated by SBook in order to be unique. You will probably want to change the name.

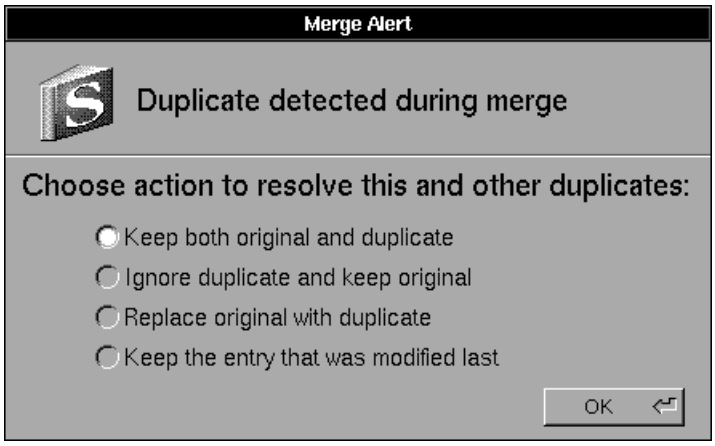
You can drag the new file, or any other SBook document file, back into an SBook window to import the entries in the file into the target window. You can drop the file anywhere in the target window. The group of entries will be imported into the target window, and the target window's message field will display how many entries were imported.



☞ If you want to transfer entries from *another application's file format* into SBook or vice versa, you should use the **Import** and **Export** commands. Full details are in Chapter 6, *Managing your SBook files*.

If you are transferring a group of entries directly from one open SBook document file into another, you don't need to create an intermediate file in Workspace. Simply drag the file icon out of the first file's export well, and drop it anywhere in the target window. The entries will be imported as above.

When importing entries, SBook checks to make sure that the entries do not duplicate existing entries in the file. If SBook finds an entry that is a duplicate in every way, it will skip over that entry as it imports. If SBook finds an entry that has the same name as an existing entry in the file, but that has contents that are different in any way from the existing entry, it will ask you what you want to do:



Choose an action from this panel, and click **OK**. The action that you choose will be applied to the current duplicate pair, and to every subsequent pair that SBook finds as it imports.

☞ The features described in this section make it especially convenient to send someone a group of SBook entries in NeXTmail. Just drag the file icon out of the export well and drop it into a Compose panel addressed to that person. When the mail message is received, the person can double-click on the file to open it, or drag it into an SBook window to import it. SBook's handling of duplicate entries makes it easy and natural to update SBook files and share information.

3

Fine-Tuning Your SBook Files

Once you know something of how to work with SBook files and start to use SBook more frequently, you may start to find that SBook's understanding of the structure of names and addresses doesn't quite correspond with yours. Perhaps SBook misinterprets a few addresses in your file, or sorts the file differently from the way you would prefer. Or perhaps you would prefer to see names in italics and comments in boldface, rather than the other way round.

SBook provides plenty of ways to refine entries and files so that formatting is just how you like it, icons are just where you want them, and names are sorted just as you would sort them by hand. This chapter explains how to modify your SBook files to suit you perfectly.

SBook's Inspector Panel

When you make changes to an SBook file, you probably would like the file to be modified in one of three ways:

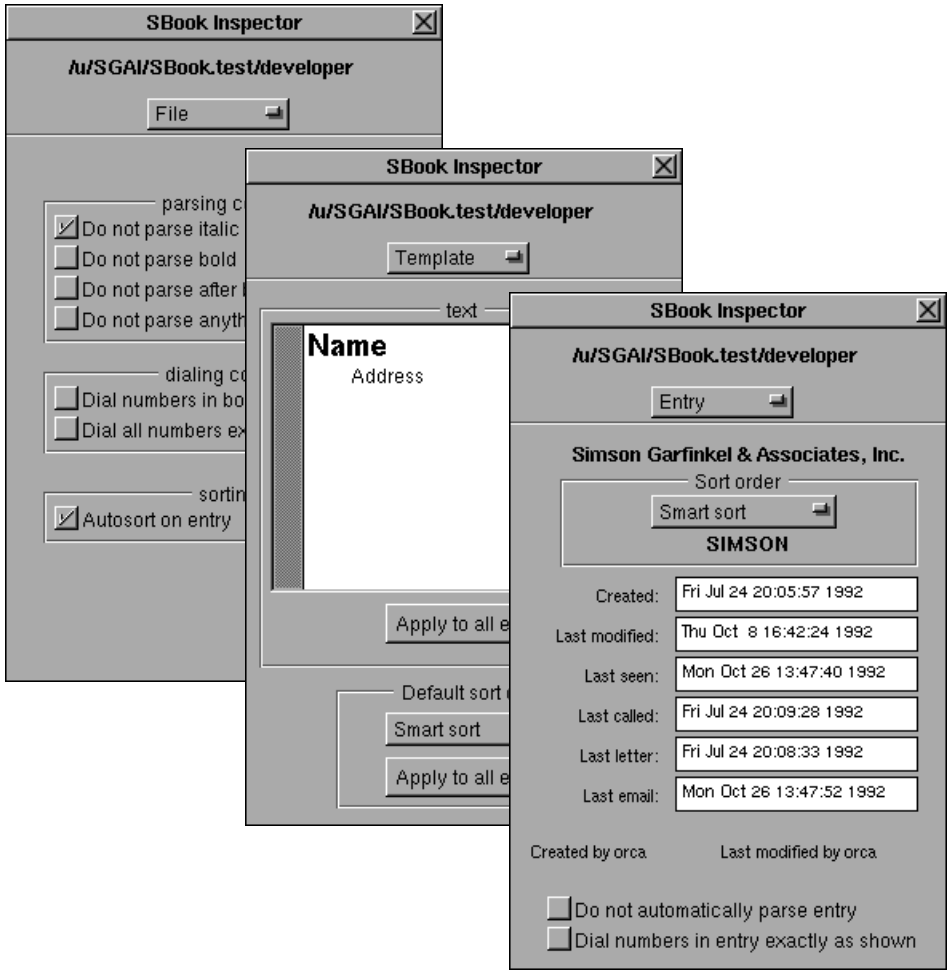
- an *individual* change modifies a single entry in this file;
- a *global* change modifies all of the entries in this file;
- a change to the *default* modifies all new, yet-to-be created entries in this file.

SBook allows most changes to be done at any of these three levels.

You can also make a change to your *preferences*. Such a change will affect the way SBook behaves in general, regardless of what file you are looking at. This section does not cover changes to SBook's preferences: refer to "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands* for more information.

Some changes, such as formatting changes to an individual entry, can be done from the menus (and their associated keyboard equivalents). Most changes at the global and default levels, however, must be done from the SBook Inspector panel. You can bring up this panel by going to the **Tools** menu and choosing **Inspector...**

The Inspector panel has three subviews: **File**, **Template**, and **Entry**. Changing the pop-up menu at the top of the panel allows you to switch between the subviews.



Like the Inspector panels in other NeXT applications, this panel remains on your screen until you click its close box or leave the application. The name of the file corresponding to the currently selected window is displayed across the top of the panel. Additionally, in the **Entry** subview, the name of the entry appears just below the pop-up menu. This allows you to verify which file and which entry you are currently inspecting.

The contents of the panel reflect characteristics of the current file, and in the **Entry** subview, the currently selected entry within that file. You can use the Inspector panel to examine and change these characteristics.

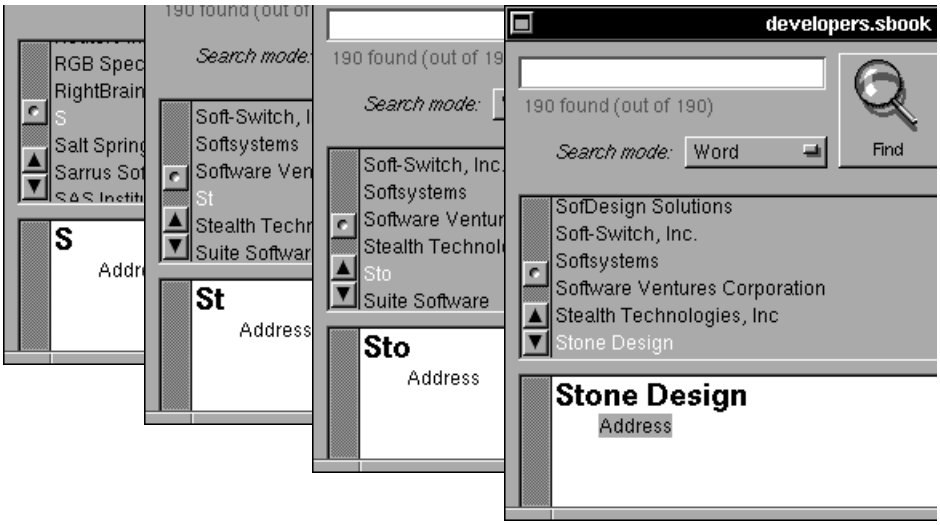
Sorting and sort order

A correctly sorted SBook file is not only convenient when you are scrolling through names in the entry list; it is helpful when you want to print out mailing labels, and essential when you want to print address books. SBook provides several features to help you keep all your files sorted in the way you prefer.

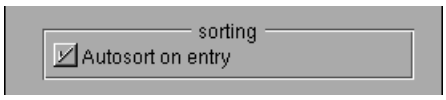
If you are using SBook to store contact information for individuals and companies, and the name of each entry corresponds to the name of the individual or company, you should have very little need to change SBook's default sorting behavior. SBook automatically sorts your files and keeps them sorted, and it automatically distinguishes between individual and company names so that it can sort them appropriately.

Automatic and manual re-sorting

SBook's autosort feature keeps your files sorted constantly. Whenever you change the name of an entry, whether you are adding or editing entries, SBook incrementally sorts the file with every character you type.



You can check whether this file has automatic sorting by using the SBook Inspector panel. Bring up the Inspector by choosing **Tools>Inspector...** and set the pop-up menu at the top of the panel to **File**. At the bottom of the panel, there is a box labeled **sorting**:



Normally this box is checked. If you choose for some reason to uncheck this box, your file may become unsorted each time you add or change entries. In that case, you can manually re-sort the file by choosing **File>Sort entries** each time your file becomes unsorted.

Default sort order

In a typical SBook file, names will appear in many different formats:

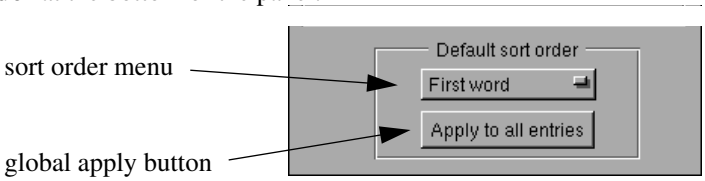
- Halloween K. Peabody
- Peabody and Associates, Inc.
- Lester R. Peabody, PhD
- The Peabody Savings and Loan

If these names were in my address book, I would probably want all of them to appear together, under "P." But if they were all sorted by first word, or all sorted by last word, each would appear under a different letter. By default, SBook tries to guess which word in the entry is appropriate for sorting. We call this method **Smart sort**.

We find that SBook's guesses work well for files with mixed contents. However, if the names in a file are all of the same type, such as *only* personal names (which are usually sorted by last word), or *only* businesses (which are usually sorted by first word), you may want to choose another sort method. The other four sort methods are:

- **First word**: Used for names like "Peabody and Associates, Inc."
- **Second word**: Used for names like "The Peabody Savings and Loan"
- **Second to last word**: Used for names like "Lester R. Peabody, PhD"
- **Last word**: Used for names like "Halloween K. Peabody"

You can change the default sort order for the file, or apply a global change to the file, from the SBook Inspector. Bring up the Inspector by choosing **Tools>Inspector...** and set the pop-up menu at the top of the panel to **Template**. You should see a section labeled **Default sort order** at the bottom of the panel.



The pop-up menu allows you to choose between the five different sort options outlined above: **First word**, **Second word**, **Second to last word**, **Last word**, and **Smart sort**.

Changing the default sort order for the file will affect only new entries to the file. Existing entries will not be changed. If you want to change the sort order for all the existing entries in the file, set the pop-up to the sort order you prefer, then click on the **Apply to all entries** button. All the entries in the file will be changed.

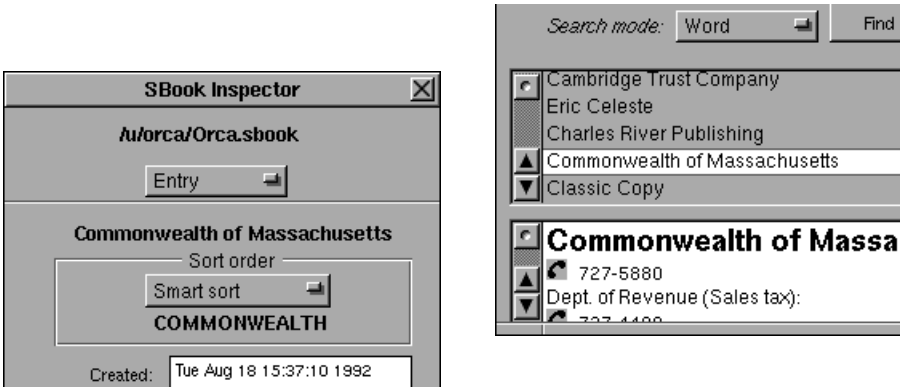
☞ If you have made any changes to correct the sort order for individual entries, *they will all be overwritten by the default sort order when you click on this button.*

Individual sort order

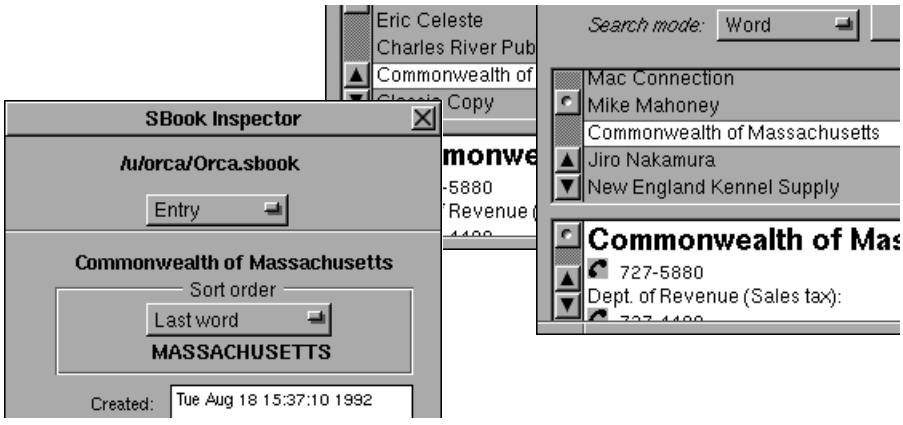
If the file as a whole is sorted correctly, but a few entries are not sorted as you prefer, you can view and change the sort order for individual entries in the Inspector. Bring up the Inspector by choosing **Tools>Inspector...** and set the pop-up menu at the top of the panel to **Entry**. The top part of the panel shows a pop-up menu which controls the sort order for the currently selected entry, and below the pop-up menu, the word this entry is sorted by.

You can change the sort order (and hence the sort word) for the currently selected entry by manipulating the pop-up menu. If you have automatic sorting in effect for this file, the entry will sort itself automatically as soon as you change the value of the pop-up.

For example, SBook's smart sort mechanism guesses that the name "Commonwealth of Massachusetts" is the name of an organization, not an individual. Most organization names should be sorted by first word, so SBook chooses "Commonwealth" as the sort word:

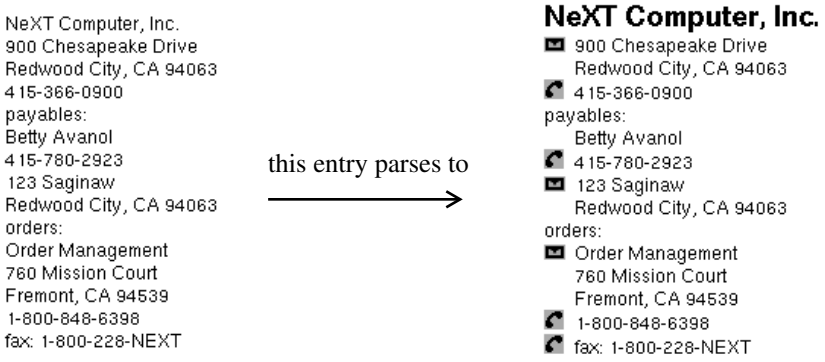


However, I prefer to have this name sorted by the last word, "Massachusetts." After changing the sort order for this entry to **Last word**, the entry appears where I want it:



Parsing and icon placement

SBook recognizes names, addresses, and phone numbers by comparing the information in each entry with a pattern. But your entry doesn't have to conform to a single, rigid pattern. SBook has a large repertoire of patterns built into it, and uses the patterns it knows to make "intelligent guesses" about your text. After it has made the guesses, it places icons next to all the addresses and phone numbers in your entry. We call this process *parsing*.



Reparsing

SBook is designed so that it parses an entry whenever parsing is needed. It is almost never necessary to tell SBook to parse an entry.

SBook parses each new entry while you type it in. After each line is entered, SBook checks to see if you have entered an address or telephone number. When you have typed in the entire entry, it will have been parsed completely.

SBook automatically recognizes when an entry needs to be reparsed:

- when parts of an entry have been edited
- when you have changed SBook's parsing options
- or when an imported entry has never yet been parsed

and reparses the entry automatically the next time the entry is displayed.

Sometimes when you are in the middle of editing an entry, icons can temporarily end up in the wrong places. Although SBook will reparse the entry correctly the next time it is displayed, you can also reparse the entry manually so that you can see how it will look right away. Choosing **Format>Icons>Parse entry** (**command-P**) will reparse any displayed entry.

Adding icons

Sometimes, you and SBook might disagree on whether a particular block of text looks like a name, address, or telephone number, or just some comments. For example, you may be working in a corporate or university environment where internal mail has an unusual address format, like "NE43-429," and you still want to print envelopes using this address format. Or you might have a friend in a faraway country with a very different telephone number format, one that SBook doesn't know, but you still want to be able to use SBook to dial this number.

In this case, go to the **Format** menu and choose **Icons**. First make sure SBook has done its best to parse this entry, by clicking **Parse entry**. If SBook still can't recognize your unusually formatted address or phone number, place the cursor to the left of the text you want to mark with the icon, and then click on **Insert icon** of the appropriate variety.

☞ If SBook cannot recognize a *telephone number*, it probably does not know the correct dialing rules for that number. In addition to inserting an icon next to the number, you may have to instruct SBook to dial this number in a special way. See "Unusual numbers" in Chapter 4 for details.

☞ If you want to create an *entire file* with addresses or phone numbers in a non-standard format, and you don't want to insert icons manually for each entry, see "Putting icons on the font template" on Page 33.

Removing icons

Generally, you won't need to remove any of the icons that SBook inserts automatically. Although it is possible for icons to end up in the wrong places after you have edited an entry, reparsing the entry will usually remove all of the misplaced icons.

However, manually inserted icons are treated differently from automatically inserted icons. When SBook reparses an entry or file, it will not remove these special icons. If you want to remove them, you must do it manually, in one of several ways:

- You can remove icons one by one by selecting and deleting them in the usual way.
- Or you can remove all of the icons from a selected entry, including the manually-inserted ones, by choosing **Format>Icons>Remove all icons** (**command-R**).
- Or you can remove all of the icons from the entire file, including the manually-inserted ones, by choosing **File>Remove all icons**.

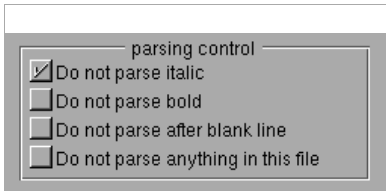
Although it is possible to delete automatically inserted icons, they will return as soon as the entry is reparsed. If any automatically inserted icons remain misplaced after deleting and reparsing, these icons are due to incorrect parsing, and must be *suppressed*, rather than deleted. The next section explains how to do this.

Suppressing icons

Generally, SBook knows which parts of the entry are comments, and which parts should have icons placed next to them. Sometimes, however, you might want to *insist* that SBook treat certain parts of an entry as comments. For example, you may want to store credit card numbers in an entry, and SBook may think they are telephone numbers and put telephone icons next to them.

By default, SBook assumes any text in italics is a comment, and does not try to parse it. You can change SBook's behavior in the SBook Inspector. Bring up the Inspector by choosing **Tools>Inspector...** and set the pop-up menu at the top of the Inspector to **File**.

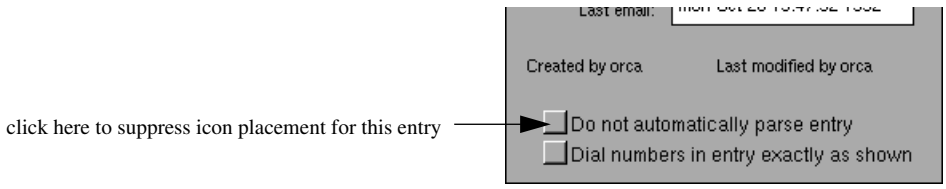
The part of the panel labeled **parsing control** contains four checkboxes that control which parts of an entry or a file are treated as comments.



- Checking the box labeled **Do not parse italic** causes SBook to treat italic text as a comment. This is the default.
- Checking the box labeled **Do not parse bold** causes SBook to treat bold text as a comment.
- Checking the box labeled **Do not parse after blank line** causes SBook to treat all text after a blank line as a comment.
- Checking the box labeled **Do not parse anything in this file** prevents SBook from parsing any part of any entry in the file. You will have to insert all icons by hand.

More than one box may be checked, and the effects of both will be combined. For example, you could have SBook treat both italics and boldface as comment fields.

If you don't want to change SBook's behavior for the file as a whole, but you do want to keep SBook from placing icons in a particular entry, set the pop-up menu at the top of the Inspector to **Entry**, select the entry in which you want to suppress icon placement, and check the box labeled **Do not automatically parse entry**:



☞ Use of the box labeled **Dial numbers in entry exactly as shown** is explained in the section "Unusual numbers" in Chapter 4.

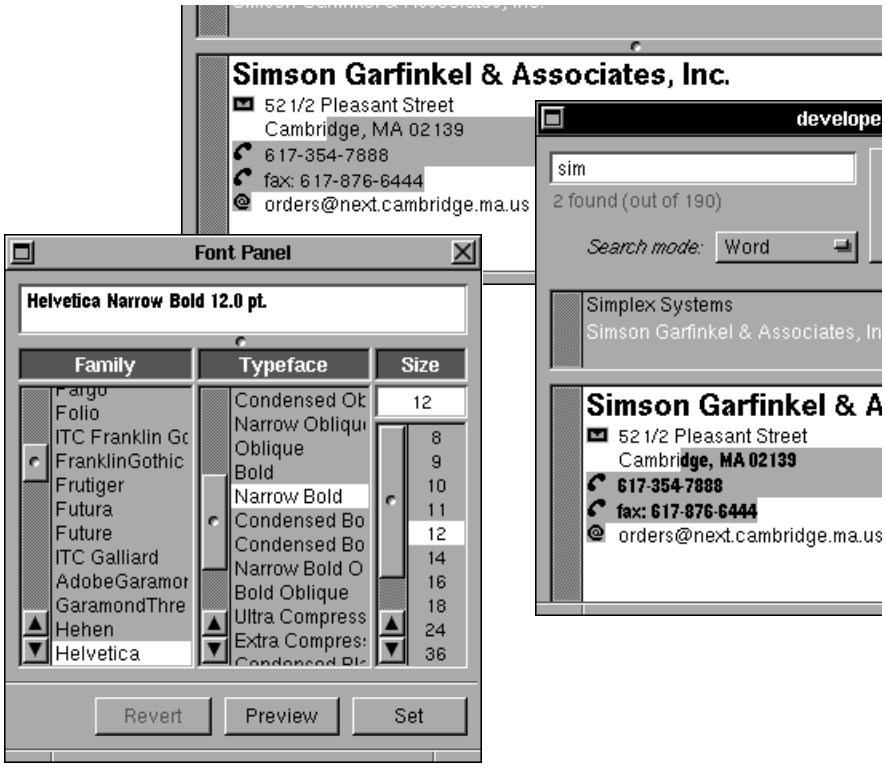
Font and formatting

SBook generally doesn't care how you format the information you store in it. You can change the font and formatting for any part of an entry, and SBook will still know where to place the icons. (There are a few exceptions to this rule, such as designated comment fields: see “Suppressing icons” on Page 30 for more detail.)

If you want to make an individual change to the font, size, and formatting of an entry, just use the **Format** menu. Use the **Font** submenu to change the font, and the **Text** submenu to change the ruler. These two submenus work just as their counterparts do in other NeXT applications:

- The **Font** submenu allows you to use bold, italic, underline, superscript and subscript. You can also adjust the size and weight of text from this menu, and you can copy and paste fonts. Or you can call up the **Font Panel** (**command-t**) to find, preview, and set the font you want.
- The **Text** submenu allows you to set the tabs and change the alignment (left, right, or center). You can also view, copy, and paste a ruler from one place to another.

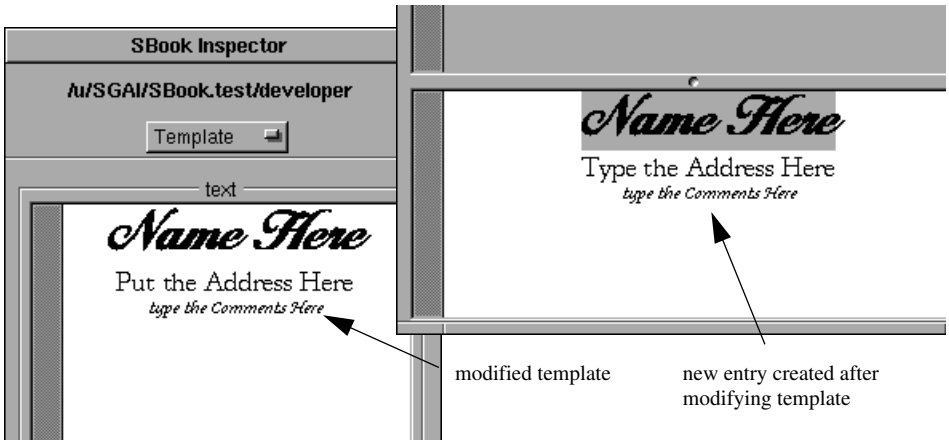
For example, you can change the font of selected text in an entry by bringing up the **Font Panel**, selecting the font you want, and then setting that font:



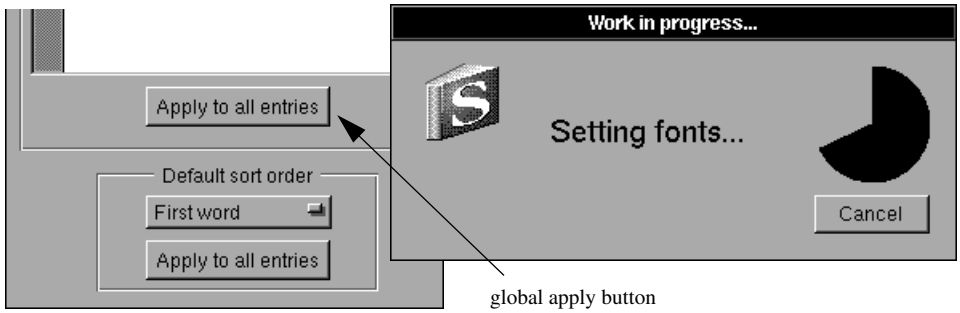
Formatting the default template

If you want to make a font or formatting change to the default for new entries, you can use the SBook Inspector. Choose **Template** from the pop-up menu at the top of the Inspector panel and edit the default template just as though you were editing an individual entry. You can make font and formatting changes, or textual changes.

Once you have changed the template, all new entries for that file will use the template for their initial contents:



You can also make a global change from the **Template** panel. Clicking on the **Apply to all entries** button with the mouse will cause all of the entries in the file to reflect the font and formatting changes that you have made to the template. A panel labeled **Work in progress...** will appear while the changes are being made.



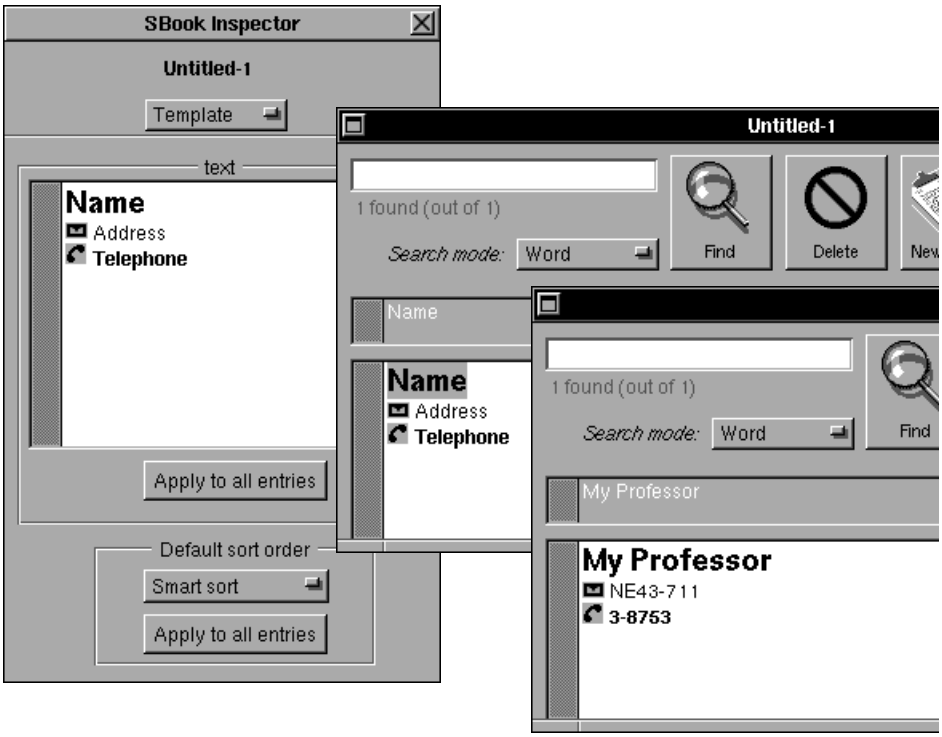
☞ When a global change is applied, only the font and formatting characteristics of the *first two lines* are applied to entries: the first line's characteristics are applied to the first line (the name) of each entry, and the second line's characteristics are applied to the rest of each entry. Also, if a single line contains several different fonts, only the first font on that line will be applied.

Putting icons on the font template

If you are working in a university or corporate environment, you may need to send mail to internal addresses that are not at all like standard postal addresses, or make phone calls to internal telephone numbers that are not at all like standard telephone numbers. For example, at MIT, the internal mail system only requires a person's name, a building code, and an office number, and the internal telephone system only requires a five-digit number.

Because SBook cannot recognize addresses and telephone numbers like these, one option you have is to insert icons individually next to each address or telephone number, as described in "Adding icons" on Page 29. However, you may have so many non-standard addresses and telephone numbers that this becomes inconvenient.

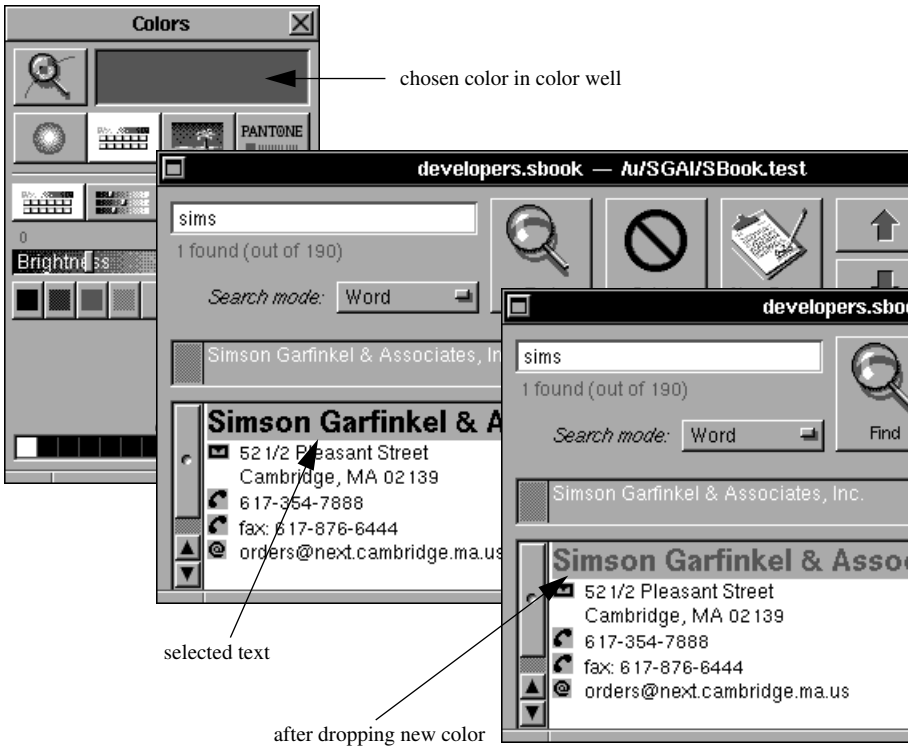
You can make an entire file in which addresses or telephone numbers appear in a non-standard format by placing one or more icons on the font template. These icons will appear automatically in each new entry so that you do not have to insert them by hand.



☞ Note in the above example that the telephone number part of the template is in bold type, so that all the non-standard telephone numbers can by dialed exactly as shown. This is described fully in "Dialing individual numbers exactly as shown" in *Using Telephone Numbers*.

The Colors panel

SBook also gives you access to a standard Colors panel so that you can change the color of text in an entry, or on the template. Bring up the Colors panel by choosing **Tools>Colors...** When you have chosen a color you like on the Colors panel, select some text in a displayed entry. Pick up the color from the color well on the Colors panel, then drop it onto the selected text. The text will now appear in the color you have chosen.



☞ You can also drop a color onto an icon to cause all of the text associated with the icon to appear in the color you have chosen.

4

Using Telephone Numbers

If you make a lot of phone calls, you will probably find SBook's dialing facility to be one of your favorite features.

- SBook can dial phone numbers for you with just one mouse click.
- Because SBook knows about US area codes and US dialing rules, it can dial phone numbers in the correct format for your area, even if they are written differently in your address book.
- SBook can dial the phone with your NeXT machine's internal speaker, or with any modem that supports the Hayes AT command set.
- SBook can use your fax modem to send a quick, one-page fax to a fax number in your address book, or it can export all of the fax numbers in your address book to the NeXT fax list.
- Finally, SBook can log your calls and faxes to a file or email so that you have a record of the people you called and how long you talked.

This section covers how to dial the phone and send faxes with SBook. It explains how SBook's dialing rules work, and how to modify them to suit your area. It also explains how to set up and use the internal speaker or modem, depending on which you prefer.

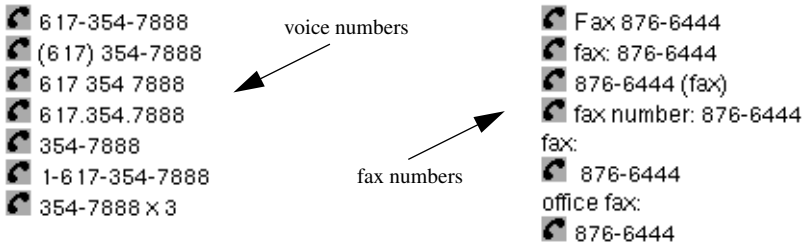
You can also use the fax numbers in your SBook document files to fax longer, more complicated documents from other applications. For more details, see "Exporting fax numbers to the NeXT fax list" in Chapter 6.

This section does *not* explain how to log your phone calls. This is covered in Chapter 7, *Logging what you do with SBook*.

Voice numbers and fax numbers

A phone icon appears next to each phone number in your database. SBook distinguishes numbers used for voice calls from numbers used for faxes even though the same icon is used. For example, the following entry contains one voice number and one fax number:

SBook distinguishes fax numbers from voice numbers by finding the word "fax." However, SBook is very flexible about how you can write a phone number, and how the word "fax" may be associated with it. Here are a few examples:



When you click on a phone icon, SBook figures out whether the number associated with the icon is a fax number or a voice number. If the number is a fax number, SBook prepares to send a quick fax. If the number is a voice number, SBook dials the phone.

☞ To read more about making voice calls with SBook, refer to "Making a voice call" on Page 37. For more detail about how to set up SBook for making voice calls, refer to "Setting up SBook's dialing method" on Page 40.

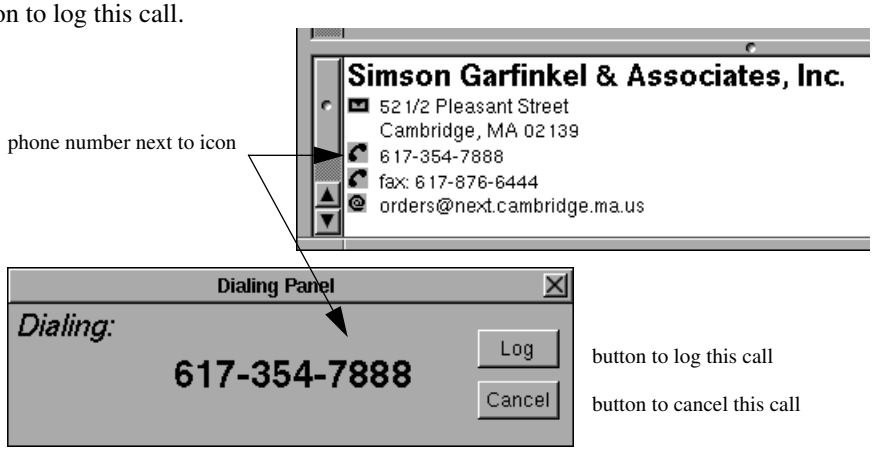
☞ To read more about sending quick faxes with SBook, refer to "Sending a quick fax" on Page 38. If you want to send a longer document, you may also want to refer to "Exporting fax numbers to the NeXT fax list" in Chapter 6.

Regardless of whether SBook is dialing the phone or sending a fax, SBook always uses its dialing rules to determine which digits to dial.

☞ To read more about setting up SBook's dialing rules for your area, refer to "Setting up SBook's dialing rules" on Page 43. For specific examples of how SBook uses its dialing rules, refer to "Telephone numbers in the U.S. and Canada" on Page 44 and "Unusual numbers" on Page 48.

Making a voice call

When you click on a phone icon next to a voice number, SBook dials the phone so that you can make a voice call. A panel labeled **Dialing panel** will appear on the screen while SBook dials. You can click on the **Cancel** button to cancel this call, or click on the **Log** button to log this call.



While SBook is dialing, you can cancel the call with the **Cancel** button, or make a log of this call with the **Log** button.

You can choose to have SBook dial with your modem or with your NeXT computer's internal speaker. By default, SBook dials the phone with the speaker. If you want to use your modem to dial the phone, you will need to make several changes to SBook's dialing preferences. See "Setting up SBook's dialing method" on Page 40 for details.

To make a call when SBook is set up to use the internal speaker (the default):

1. Pick up the phone and point it towards the speaker.

☞ On a monochrome system, the speaker is located at the back of the monitor. On a color system, the speaker is located on the sound box. You will need to hold the phone near enough to the speaker to ensure that the tone quality is good enough to dial the phone. You may need to experiment with different places.

2. Then click on the icon next to the phone number you want to dial.
3. SBook will immediately begin dialing the phone. Telephone dialing tones will be played through the speaker, corresponding to the digits in the phone number.

To make a call when SBook is set up to use your modem:

1. Click on the icon next to the phone number you want to dial.
2. SBook sends commands to your modem which cause it to dial the phone directly, then hang up.
3. You pick up the phone before the modem hangs up.

Making a call from another application using Ser vices

Sometimes you may want to use SBook's telephone dialing facilities to dial the phone for you, but you may not want to bother pasting the telephone number into your SBook file. For example, someone may send a phone number in email, and you may want to give them a call right away.

To dial a phone number from another application through Services, just select the phone number, then select **Services>SBook>Dial phone**. A standard SBook dialing panel will appear on the screen, and SBook will begin dialing the telephone number you selected.

Regardless of whether a phone number is dialed through Services or not, SBook uses the same dialing panel, so that you can log this call just as you would normally do. SBook also uses your settings on the **Dialing method** and **Dialing rules** preference panels so that all numbers are dialed in the same way.

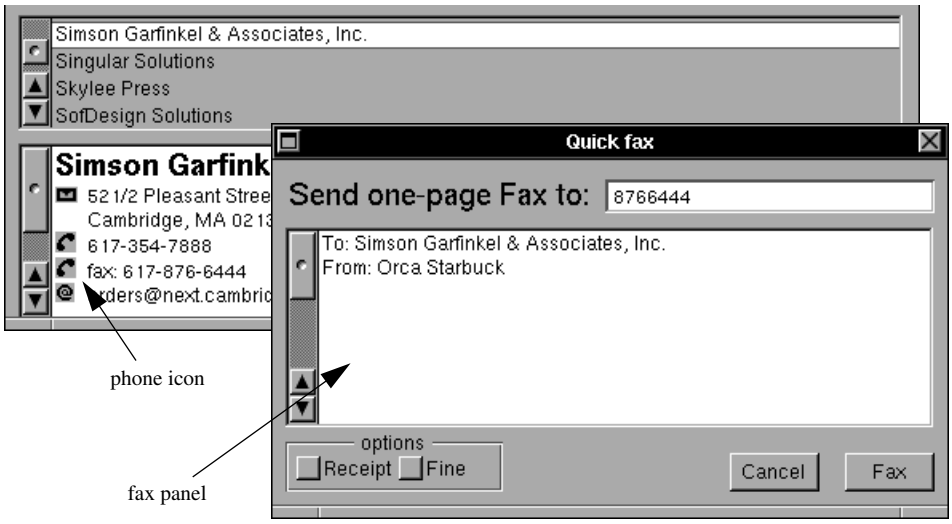
☞ See "Services provided by SBook" on Page 101 for more information on the services that SBook provides to other applications.

Sending a quick fax

When you click on a phone icon next to a fax number, SBook prepares to send a quick fax to that number. Once you click on the icon, you will see a panel labeled **Quick fax**.

Type your message in the scrollable panel, and edit it any way you like. You can use the Font Panel or any of the standard editing commands to compose your message. The fax number at the top of the panel is also editable, if you need to change it.

When you are done composing your message, click on the button labeled **Fax** at the bottom of the panel to send the fax. To cancel, you can click on the **Cancel** button, or just click on the close button at the top of the panel.



☞ Just as though a voice call were being made, SBook uses the settings on the **Dialing rules** preferences panel to determine how to dial all fax numbers. See "Setting up SBook's dialing rules" on Page 43 for more information.

☞ SBook does not use the settings on the **Dialing method** preferences panel when it sends a quick fax. Instead, it uses the standard NeXT fax facilities. In order to send quick faxes with SBook, you will need to have a fax modem attached to your NeXT computer and correctly set up with NeXT's PrintManager application.

To send a quick fax to a number that is not in your SBook file, or not marked as a fax number, you can use the **Tools>Quick fax...** command to bring up a blank **Quick fax** panel that you can fill in with a fax number and a message:

☞ You can also use the fax numbers in your SBook document files to fax longer, more complicated documents from other applications. For more details, see "Exporting fax numbers to the NeXT fax list" in Chapter 6.

Setting up SBook's dialing method

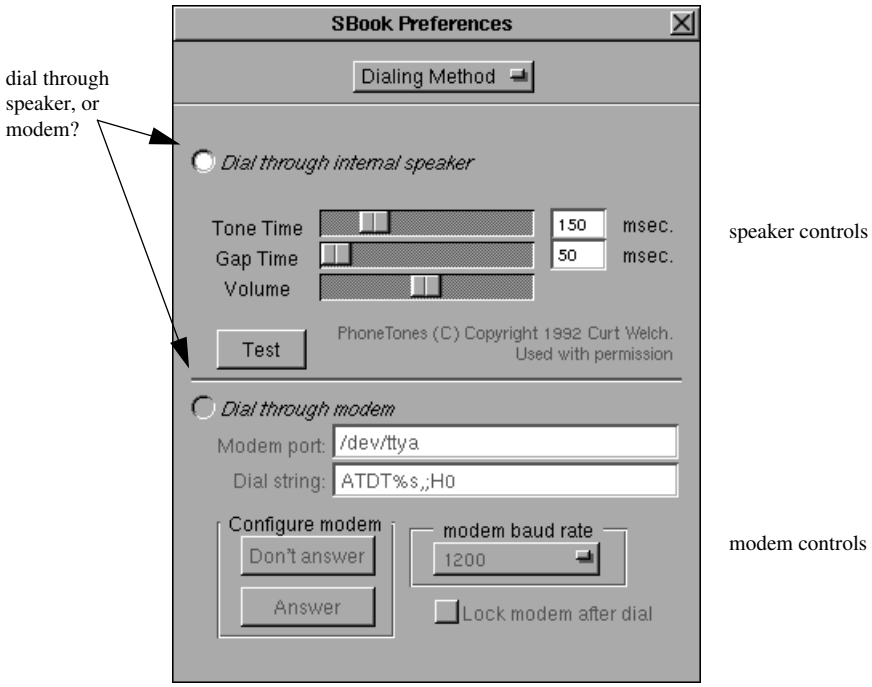
When you make a voice call, SBook allows you to use either of two dialing methods: dialing with your NeXT computer's internal speaker, or dialing with your modem.

SBook does not use the settings on the **Dialing method** preferences panel when it sends a quick fax. Instead, it uses the standard NeXT fax facilities. In order to send quick faxes with SBook, you will need to have a fax modem attached to your NeXT computer and correctly set up with NeXT's PrintManager application.

Dialing with the internal speaker (the default) is easier to set up, requires no additional equipment, and makes a great demo for your friends. If you don't make calls with SBook very often, you will probably want to continue to use the speaker.

Dialing with the modem is more reliable, more versatile, and doesn't require you to hold the phone up to the speaker every time you make a telephone call. If you plan to make a lot of calls with SBook, you may want to start using a modem.

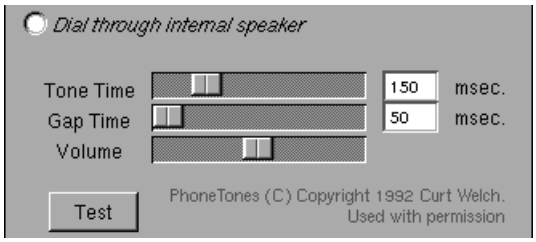
You can select and set up your preferred dialing method from the **Dialing method** subview of the Preferences panel. Bring up the Preferences panel by choosing **Info>Preferences...** and select **Dialing method** from the pop-up menu at the top of the panel.



On the left side of the Preferences panel, there are two radio buttons that allow you to select a dialing method. Click on the button corresponding to the method you prefer. The half of the panel that you have selected will then be activated, and the other half will be grayed out.

Dialing with the internal speaker

When you have your preference set to dial with the internal speaker (the default), you hold the phone up to the speaker and SBook produces tones to dial the phone. These tones are controlled by the top half of the **Dialing method** panel.



The three slider switches control the tones produced by the speaker. You probably want to adjust the sliders so that the tones are slow and loud enough to dial your phone, but fast and quiet enough that it is not unpleasant to have them played by your speaker.

- Adjusting the **Tone time** affects how long each tone lasts.
- Adjusting the **Gap time** affects how much time passes between tones.
- Adjusting the **Volume** affects how loudly the tones are played.

You can click on the button labeled **Test** to play a short sequence of tones so that you can hear how the tones will sound when SBook dials, and determine whether they dial the phone correctly. The test sequence is 555-1212.

Dialing with your modem

When you use a modem to dial the phone, the modem is attached to your voice line in parallel with your telephone. SBook sends commands to your modem which cause it to dial the phone directly, then hang up. You pick up the phone before the modem hangs up.

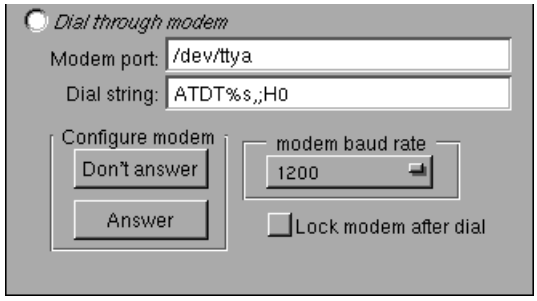
If you already use, or plan to use, a modem for data transmission (outgoing faxes and connecting with other computers) we recommend that you attach a *second* modem devoted to dialing the phone for your voice line. You'll probably want to use a cheap one, since all it will be doing is dialing the phone for you. An old 300 baud modem will do just fine.

☞ If your existing modem is used for *incoming* faxes, you *must* use a modem devoted to SBook dialing, because incoming faxes block the modem.

Attach the modem, with a standard NeXT modem cable (available from NeXT Connection or Computer Attic), to one of the serial ports on the back of your NeXT.

☞ Don't plug your phone into the back of the modem! Modems are not designed to be used with a voice line, and sometimes cut off the voice connection while they operate. Use a "T" connector to attach the modem *in parallel* with your phone.

Once you have attached the modem to your voice line, you need to set up SBook's dialing preferences. First change the radio button to **Dial through modem**. The modem section of the panel will become activated:



The section labeled **Configure modem** controls whether your modem will automatically answer the phone when it rings. The two buttons in this section, **Answer** and **Don't Answer**, send commands to your modem that will turn "auto-answering" on or off until the next time the modem receives one of these commands.

You should decide whether you want to turn auto-answering on or off depending on the kind of calls you receive on the telephone line you have attached to the modem:

- If this line receives voice calls, *you need to make sure your modem will not answer the phone*. Click on the button labeled **Don't answer**.
- If this line only receives data transmissions, you probably *do* want your modem to answer the phone. Click on the button labeled **Answer**.

The field labeled **Modem port** determines the port that SBook uses to dial the phone.

- If you are using a modem devoted to SBook dialing, set **modem port** to "/dev/ttya" or "/dev/ttyb" depending on whether your modem is attached to the "A" or "B" serial port.
- If you must share the modem between SBook dialing and your data transmissions, set **modem port** to "/dev/ttyda" or "/dev/ttydb."

The field labeled **dial string** determines the commands that are sent to your modem when you dial a number. Within the dial string, the characters "%s" represent the phone number. SBook will replace those characters when it dials a particular number. For example, dialing 354-7888 with the dial string set to "ATDT%s,;H0" will cause SBook to send the string "ATDT3547888,;H0" to the modem.

☞ You probably will not need to change the dial string. Refer to the owner's manual for your modem if you need more information on the commands in the dial string.

The pop-up menu labeled **modem baud rate** determines the baud rate SBook uses when it communicates with your modem. Set the pop-up to the baud rate you prefer.

Finally, whenever you make a phone call with your modem, there is a small amount of overhead involved in securing the modem port for your use. If you check the box labeled **Lock modem after dial**, SBook locks up the modem port between calls so that you don't have to secure the modem for yourself each time. The modem is locked when you make the first call, and it is unlocked when you quit out of SBook. You can unlock the modem at any time by going to the **Tools** menu and choosing **Unlock modem** (**command-U**).

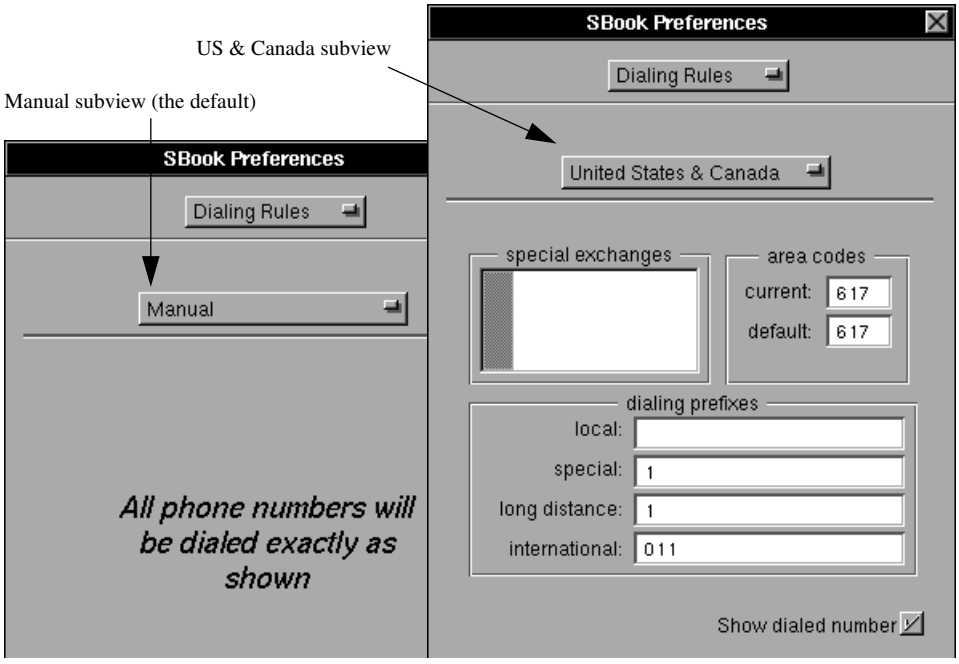
☞ If you are using pulse dialing, we have found that it is usually necessary to lock the modem, because pulse dialing takes so much longer than tone dialing.

☞ When the modem is locked, other people and other applications can't use it. So if you are using your modem for data transmissions, or if other people on your system are also making calls with this modem, you should leave the box unchecked.

Setting up SBook's dialing rules

SBook is designed to allow you to store phone numbers in a variety of formats that are natural for you, yet have SBook dial them in the correct way for your local calling area. Just like you do when you are dialing by hand, SBook decides how to dial a number by using what it knows about the rules in your area.

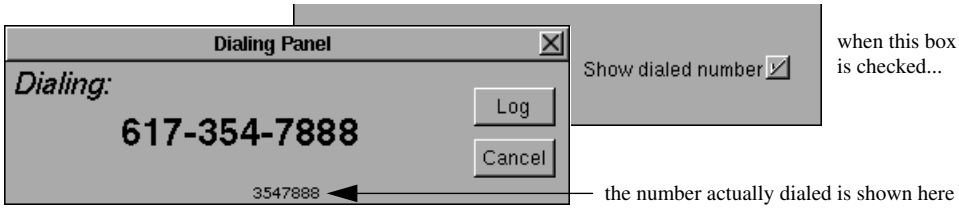
SBook's dialing rules are controlled by the **Dialing rules** section of the Preferences panel. Bring up the Preferences panel by choosing **Info>Preferences...** and select **Dialing rules** from the pop-up menu at the top of the panel. You will see one of two subviews:



Each subview presents a different set of dialing rules, corresponding to a different dialing area. The dialing rules pop-up menu, located just below the main pop-up on the Preferences panel, controls which view is active. Choose the view from the pop-up that best corresponds to your local dialing area and its rules.

☞ The current version of SBook only contains specific rules for the **United States and Canada**. All other dialing areas must use **Manual**, the default.

Regardless of your dialing area, you will see a checkbox labeled **Show dialed number** at the bottom of the panel:



Checking this box allows you to determine if the dialing rules you have set are working correctly for your area. Each time you dial a number, the exact digits that SBook dials will appear on the **Dialing Panel**. While you are setting up your dialing rules, you will probably want to have this box checked. Once you become confident that your dialing rules are working correctly, you will probably want to have this box unchecked.

Telephone numbers in the U.S. and Canada

SBook's dialing rules for the U.S. and Canada distinguish between four types of numbers:

- *Local numbers* are telephone numbers in your area code. From most telephones, you can make a call to a local number by dialing:

  seven digit number

- *Long distance numbers* are telephone numbers that are in an area code that is different from your area code. From most telephones, you can make a call to a long distance number by dialing:

  1 + area code + seven digit number

- *International numbers* are telephone numbers that are not in the U.S. or Canada. From most telephones, you can make a call to an international number by dialing:

  011 + country code + city code + telephone number

- *Special numbers* are telephone numbers that are in your area code but that you cannot dial in the usual way. These may be rural telephone numbers if you live in an urban area. To make a call to a special number, you might need to dial:

  1 + seven digit number

You can control which numbers are treated as local, long distance, international, or special numbers by changing the values in the **area codes** and **special exchanges** sections of the **Dialing rules** panel.

The **area codes** section controls how SBook distinguishes between local and long distance numbers. Enter your area code in the field labeled **current**. When SBook dials a number, it compares the number's area code with your current area code to determine whether this is a long distance call.

☞ By default, SBook assumes that any numbers written in an SBook file without area codes are located in the current area code. SBook dials these numbers as local numbers. If you prefer, you can specify a *different* area code for these numbers by entering an area code in the field labeled **default**.

The **special exchanges** section controls which numbers are treated as special numbers. These numbers can usually be identified by the *exchange* (the first three digits):

(617) 354-7888
exchange

If you have any special exchanges in your area code, enter them in the **special exchanges** section. Special exchanges must be three digits long and may be separated by any non-numeric character.

Local numbers with different prefixes

In some areas, you must dial a "1" before most or even all telephone numbers in your area code. The dialing rules in these areas differ from the standard dialing rules in this way:

- You must make calls to most local numbers by dialing:

  1 + seven digit number

- You can call a few exchanges by dialing:

  seven digit number

If you live in such an area, you can switch how SBook handles local and special numbers. In the **dialing prefixes** section, enter a "1" in the field labeled **local**, and delete the "1" in the field labeled **special**. In the **special exchanges** section, list all the exchanges that can be called without a "1" in your area code. Now SBook will dial correctly for your area.

There are a few areas in the U.S. and Canada where the area code must always be dialed, even for calls in the same area code. In these areas, the dialing rule for local numbers is:

- You must make calls to most local numbers by dialing:

  1 + area code + seven digit number

If you live in such an area, enter a "1" and your area code in the field labeled **local** in the **dialing prefixes** section.

Academic or corporate phone systems

In a typical academic or corporate phone system, you can make internal calls or calls to the outside. Internal calls usually only require an extension number to be dialed, which is often the last four or five digits of the seven-digit telephone number. Calls to the outside usually require an initial number to be dialed to reach an "outside line."

For example, the MIT phone system uses three exchanges within the 617 area code: 253, 258, and 225. Internal calls require only the last five digits of the seven digit phone number to be dialed. External calls require a "9" to be dialed, then the outside phone number. The rules for the MIT phone system can be summarized as:

- You can make calls to numbers in MIT exchanges by dialing:

  five digit number

- You can make calls to other numbers by dialing, as appropriate:

  9 + seven digit number

  9 + 1 + area code + seven digit number

  9 + 011 + country code + city code + telephone number

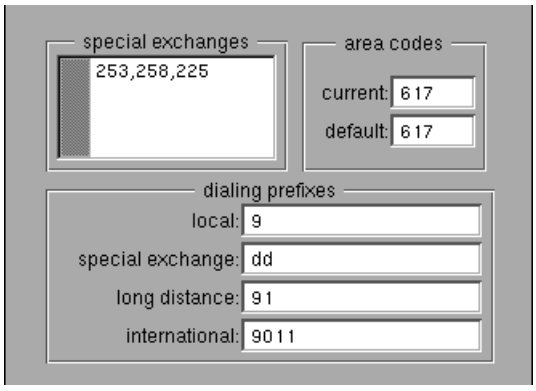
SBook can handle this situation easily.

☞ SBook allows you to insert a "d" in a dialing prefix to *delete* a leading digit of the telephone number. More than one "d" can be inserted to delete multiple digits.

Using this special character, it is simple to encode the MIT rules:

- The three exchanges used by the MIT phone system can be treated as **special exchanges**. Removing the first two digits of the seven digit number gives the correct number to dial within MIT, so the **special** prefix should be "dd."
- An initial "9" should be added to the dialing prefixes for all other numbers.

The correct settings for MIT would look like this:



Calling card numbers

From some telephones, you must dial every long distance or international number by using a telephone calling card number.

☞ If you do not need to dial *every* number by using a calling card number, refer instead to "Unusual numbers" on Page 48.

The calling card dialing rule for long distance numbers might be:

- You must make calls to long distance numbers by dialing:

  0 + area code + seven digit number, <wait for tone>, *calling card number*

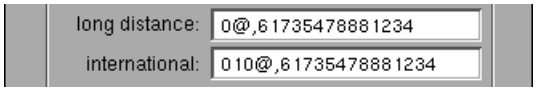
The calling card dialing rule can be encoded into SBook's **long distance** prefix, using two special characters:

☞ Inserting a comma in a dialing prefix causes SBook to pause briefly at that point, then dial the rest of the number.

☞ Inserting an "@" in a dialing prefix causes SBook to dial the telephone number at that point, rather than at the end of the prefix.

Therefore, the **long distance** prefix should be "0@," and then the calling card number.

As an example, for the calling card number 617-354-7888-1234, the correct **long distance** and **international** prefixes would be:



If you find that SBook is not pausing long enough, add another comma or two.

Extension numbers

Some people in your address book may not be reached directly by dialing a telephone number. You may need to dial a telephone number and then ask for an extension number to reach a person's office. Although some phone systems still require that you talk to a human operator to request an extension number, many systems will allow you to dial the extension number so that you can reach a person's office phone automatically.

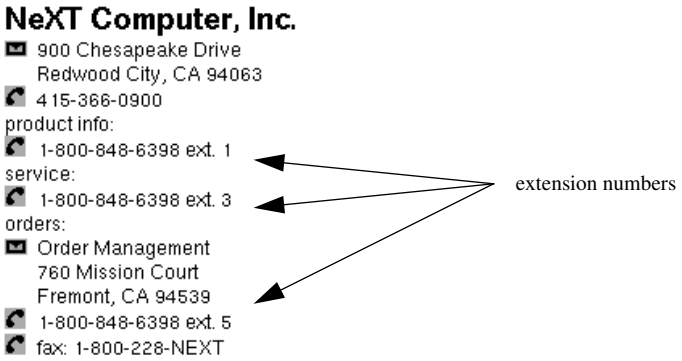
Or you may need to dial a one- or two-digit extension number to choose between different departments in a company. For example, you can reach NeXT Computer's service department by calling NeXT, then dialing a "4" when the automated phone system answers.

The dialing rule for such a system may work as follows:

- You can make calls to numbers with extensions by dialing:

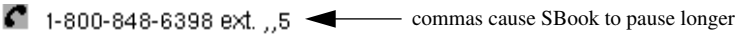
  telephone number, <pause>, *extension number*

SBook handles this rule automatically. When you type a number in your address book, you can add an extension by typing "extension" (or an abbreviation like "ext." or even "x"), and then the extension number. Then when you click on the telephone icon next to the number, SBook will dial the telephone number, pause for a moment, and then dial the extension.



☞ Some phone systems that use extension numbers may require you to dial a special non-numeric character (either "*" or "#") before or after the extension number. You can put the characters "*" and "#" in an extension, and SBook will dial them.

☞ If you find that a particular phone system requires a longer pause than SBook normally inserts between the telephone number and the extension, you can add one or more commas just before the extension number:



Unusual numbers

Regardless of the dialing rules you have set up, there may be some numbers that do not follow any rule and must be dialed in an unusual way. These may be telephone numbers that require special handling, or they may be access codes of some kind.

- For example, you might want to put your telephone calling card number in an SBook file so that you can have SBook dial the code for you if you need to make a call using the card number.
- Or you might always want to dial a particular telephone number by using a calling card or making a collect call, rather than dialing direct.

If you try to dial unusual numbers as though they were regular telephone numbers, SBook will try to interpret them according to its dialing rules, and might add or remove digits. Instead, you can tell SBook that an individual number, or all the numbers in an entry or file, must be dialed *exactly as shown*. This is done by using the SBook Inspector.

☞ Refer to Chapter 3, *Fine-Tuning Your SBook Files*, if you need a complete description of the Inspector and how to use it.

☞ You should use this method only as a last resort, because it causes SBook to *ignore all of its dialing rules* when dialing the affected numbers, and makes the file less portable. Try using the dialing rules instead if you can.

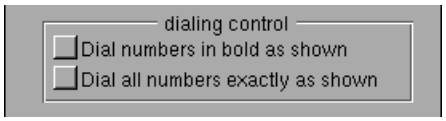
For example, in "Academic or corporate phone systems" on Page 46, instead of writing MIT numbers in the SBook file as seven digit numbers with special exchanges, we could have marked them to be dialed exactly as shown, but then they could not have been dialed from non-MIT telephones. Writing the MIT numbers as seven digit numbers with special exchanges allows the file to be used outside of MIT without any modification.

Dialing individual numbers exactly as shown

To mark individual numbers in a file to be dialed exactly as shown, you can enter the numbers in bold, and have SBook dial all bold numbers exactly as shown.

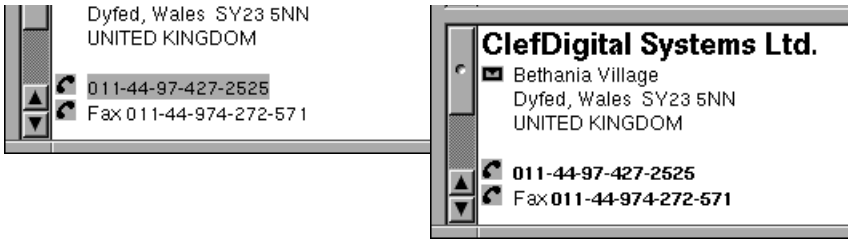
By default, bold numbers are dialed like any other telephone number, so you need to use the SBook Inspector to tell SBook that bold numbers *in this file* should be dialed as shown. *Each file* containing numbers that you want to mark in this way must be modified, using the SBook Inspector, so that it will treat bold numbers specially.

Make sure the file you want to modify is selected on the screen, then bring up the Inspector by choosing **Tools>Inspector...** The name of the file should appear at the top of the panel. Choose **File** from the pop-up menu just below the filename. At the bottom of the File subview, there is a box labeled **dialing control** containing two labeled checkboxes:

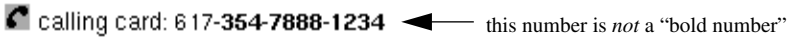


Check the box labeled **Dial numbers in bold as shown**.

Now you can mark an individual number to be dialed exactly as shown. After entering the number where you would like it to appear in your SBook file, select the number and choose **Format>Font>Bold** (**command-b**).



☞ Although the written label next to the number need not appear in bold, *the first digit* in the number must be bold for SBook to consider it as a "bold number."

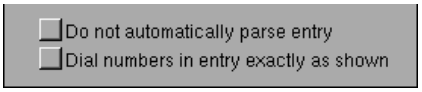


Dialing all of the numbers in an entr y or file exactly as shown

Instead of marking each individual number that you want dialed as shown, you can mark an entire entry or file. This tells SBook to *ignore all the dialing rules it knows* for all of the numbers in this entry or file.

If you want all the numbers in a particular entry to be dialed exactly as shown, make sure that the entry is selected or the insertion point is inside the entry in the display, then bring up the SBook Inspector by choosing **Tools>Inspector...** Choose **Entry** from the pop-up menu at the top of the panel. The name of the entry should appear near the top of the panel, just above the section labeled **Sort word**.

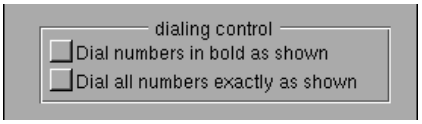
At the very bottom of the panel, there is a checkbox labeled **Dial numbers exactly as shown**:



Checking this box will cause SBook to dial the numbers in this entry exactly as shown.

☞ Using this method might lead to confusion! The entry itself will not appear any differently when displayed, so the only way to tell if an entry is marked this way is to bring up the Inspector. Before trying this method, consider using bold numbers to visually distinguish the numbers in this entry from the other numbers in the file. (See “Dialing individual numbers exactly as shown” on Page 49 for more information.)

If you want all the numbers *in this file* dialed exactly as shown, choose **File** from the pop-up menu at the top of the Inspector panel. Just below the checkbox labeled **Dial numbers in bold as shown**, you will see a checkbox labeled **Dial all numbers exactly as shown**:



Checking this box will cause SBook to dial all of the numbers in this file exactly as shown.

☞ Using this method might lead to confusion! The file itself will not appear any differently when open, so the only way to tell if an file is marked this way is to bring up the Inspector. Before trying this method, consider changing the Dialing Rules section of the Preferences panel to Manual. (See “Setting up SBook’s dialing rules” on Page 43 for more information.)

5

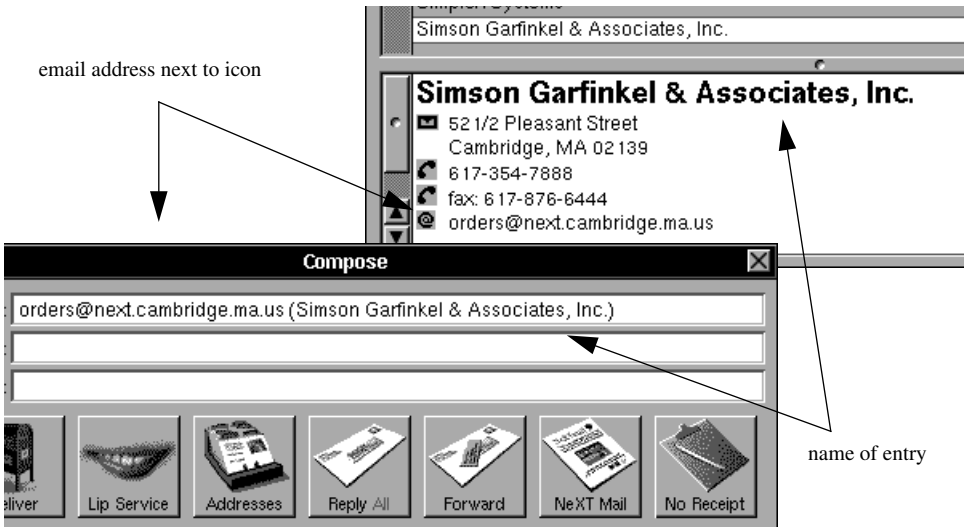
Using Postal and Email Addresses

This section covers SBook's facilities for sending email, printing envelopes, and maintaining and using mailing lists. In this chapter, you will learn how to:

- Send individual email messages and print envelopes or mailing labels.
- Make bulk mailings using email, envelopes, or mailing labels.
- Make and print address books in many different formats.

Sending an email message

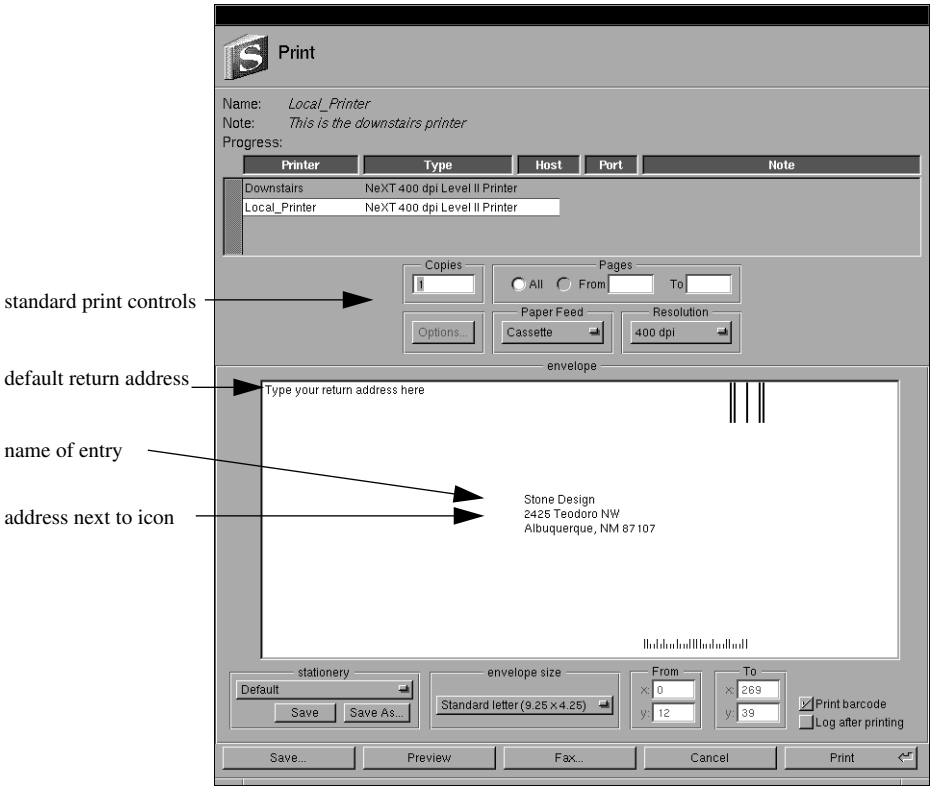
To send email to someone from SBook, first find and display the person's entry, then click on the email icon next to the address you want to use. The Mail application will be notified, and a pre-addressed Send window will appear on your screen:



☞ You can also make bulk email mailings with SBook. Refer to "Mailing lists and address books" on Page 56 for details.

Printing an envelope or mailing label

To print an envelope from SBook, first find the person you want to address it to, then click on the envelope icon next to the address you want to use. SBook will open a print panel showing you the envelope exactly as it will be printed.



The print panel is editable, so if you have any changes you want to make, you can make them right on the envelope face. For example, you will notice that a default return address appears in the upper left corner of the envelope. You will probably want to change this address. Go ahead and edit it, on the print panel, until you are pleased with it.

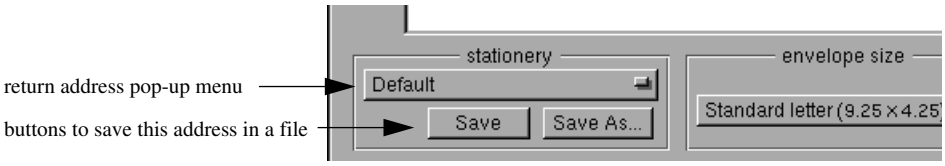
When you are ready to print the envelope, slide the envelope, face up, into the manual feed slot on your printer, and then click on **Print**.

☞ If you are using a NeXT printer, do *not* set the pop-up menu in the box labeled **paper feed** to **Manual**, or the envelope will not feed through properly!

☞ If you are using a non-NeXT printer, such as an HP Laserjet, you may need to make some adjustments so that SBook will print in the correct locations for the envelope. See “Using a non-NeXT printer” on Page 55 for more information.

Envelope print panel controls

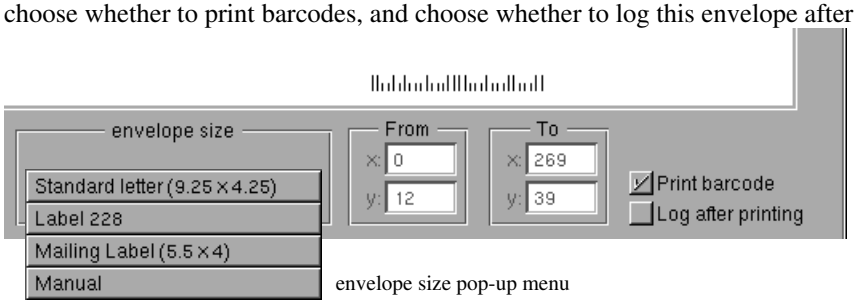
On the left side of the panel, there are controls to allow you to switch between different return addresses and save any changes you may wish to make:



The box labeled **stationery** contains a pop-up menu that allows you to select between different return addresses. When you have changed one of these addresses by editing it on the envelope print panel, you can click on either the **Save** button or the **Save as...** button to save the changes.

☞ See "Envelope preferences" on Page 54 for more information about how SBook's return addresses are stored.

On the right side of the panel, there are controls to allow you to change the envelope format, choose whether to print barcodes, and choose whether to log this envelope after printing:



envelope size pop-up menu

The pop-up menu in the box labeled **envelope size** allows you to select the size and shape of the envelope or mailing label you are using. You can choose preset formats for standard business envelopes, standard individual mailing labels, or US Postal Service Label 228 (a label that is pre-printed for US Priority Mail).

☞ If you choose **Manual** from the pop-up menu, the boxes labeled **From** and **To** will become activated, so that you can choose a different location for the "from" and "to" addresses on your envelope. You may have to experiment with different settings; you will be able to preview the effects directly on the print panel.

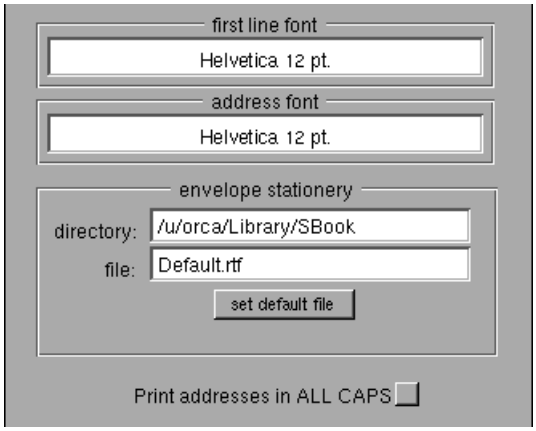
The checkbox labeled **Print barcode** determines whether SBook prints barcodes at the top and bottom of the envelope, based on the zip code.

The checkbox labeled **Log after printing** determines whether SBook logs this envelope after it is printed.

☞ See Chapter 7, *Logging what you do with SBook* for more information about logging the envelopes you print with SBook.

Envelope preferences

You can view and change several envelope preferences from the **Envelopes** subview of the Preferences panel. Bring up the Preferences panel by choosing **Info>Preferences...** and select **Envelopes** from the pop-up menu at the top of the panel. The settings on this panel control envelope printing:



The box labeled **envelope font** allows you to view and change the default font for addresses printed on envelopes:

- The field labeled **first line** determines the font that the name is printed in
- The field labeled **others** controls the font that all subsequent lines are printed in.

You can change either one of these two font defaults by double-clicking on one of the two font wells. The Font Panel will appear so that you can choose and set the font.

The box labeled **envelope stationery** allows you to change the default directory and file containing the default return address by clicking on the button labeled **set default file**.

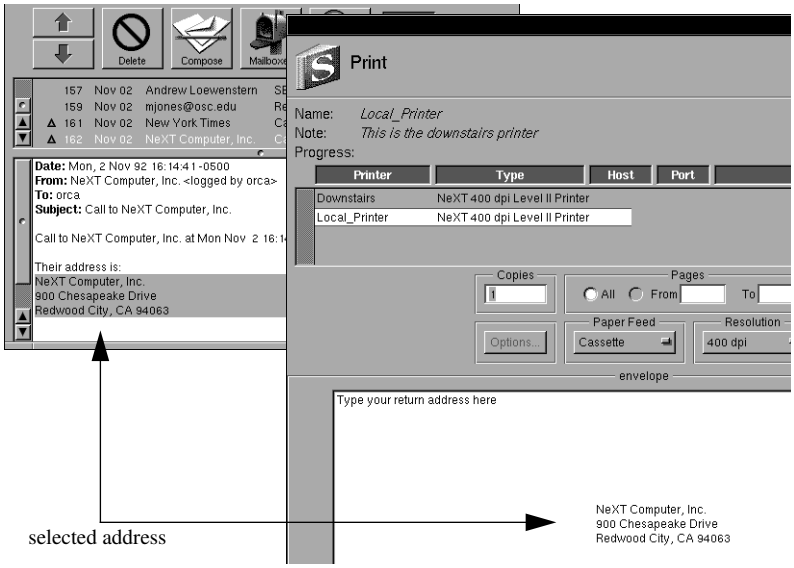
- The field labeled **directory** determines the directory which contains all the default return addresses that appear on the return address pop-up on the envelope panel.
- The field labeled **file** determines which file in the above directory is the default.

☞ The return addresses in this directory are stored as RTF or RTFD files. You can edit and save them directly from the envelope print panel, or you can use an editor like Edit to create and edit them, change the fonts and formatting, or add graphics.

If the checkbox labeled **Print addresses in ALL CAPS** is checked, SBook will print all return addresses in all caps, regardless of how they appear in the SBook document file.

Printing envelopes from the Ser vices panel

You can print envelopes directly from another application, such as Mail or Edit, by using the Services menu. Select a region of text containing the address in the other application, then choose **Services>SBook>Print envelope**. SBook's envelope print panel will appear on the screen, pre-addressed with the address you selected:



See "Services provided by SBook" in *Appendix A: SBook's Menus and Menu Commands* for more information on the services that SBook provides to other applications.

Using a non-NeXT printer

If you are using a non-NeXT printer such as an HP Laserjet, your printer may not print envelopes in the same place on the page as the NeXT printer does.

You can adjust where the envelope face is printed on the page by bringing up a Terminal window and experimenting with the following two commands, where *<Xoffset>* and *<Yoffset>* are horizontal and vertical offsets for where the envelope face is printed:

```
% dwrite SBook EnvelopeXOffset <Xoffset>
% dwrite SBook EnvelopeYOffset <Yoffset>
```

You will probably need to experiment before you find appropriate settings. Once you find the correct settings, they will remain even after you log out. You should not need to enter these commands again unless you switch to a different printer. If you want to restore your settings to work with a NeXT printer again, use the following commands:

```
% dremove SBook EnvelopeXOffset
% dremove SBook EnvelopeYOffset
```

Mailing lists and address books

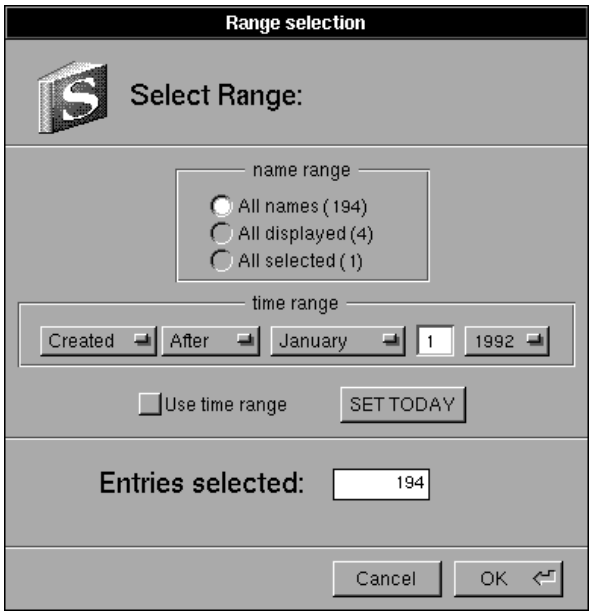
SBook allows you to make three kinds of reports: address books, mailing labels, and bulk email mailings. Although the final output from each of these three reports is very different, the process of making them is very similar.

To make a report with SBook,

1. Select the SBook window corresponding to the file you want to use.
2. Choose the report type you want from the menu under **Tools>Reports**.
3. Select a range of entries that you want to use to build this report. This step is described in detail in "The Range Selection panel" on Page 56.
4. SBook will now extract the relevant information and build the report. This step is described in detail in "Building the report" on Page 58.
5. View the report, scroll through it, modify it until it pleases you, and then print the address book or labels, or make the email mailing. This step is described in detail in "Bulk email mailings" on Page 59, "Mailing labels" on Page 61, or in "Address books" on Page 64, depending on the kind of report you are making.

The Range Selection panel

If you don't want to use all the entries in the selected SBook file, you will need to select a range. To make this easy, the Range Selection panel will pop up automatically when you tell SBook to build a report.



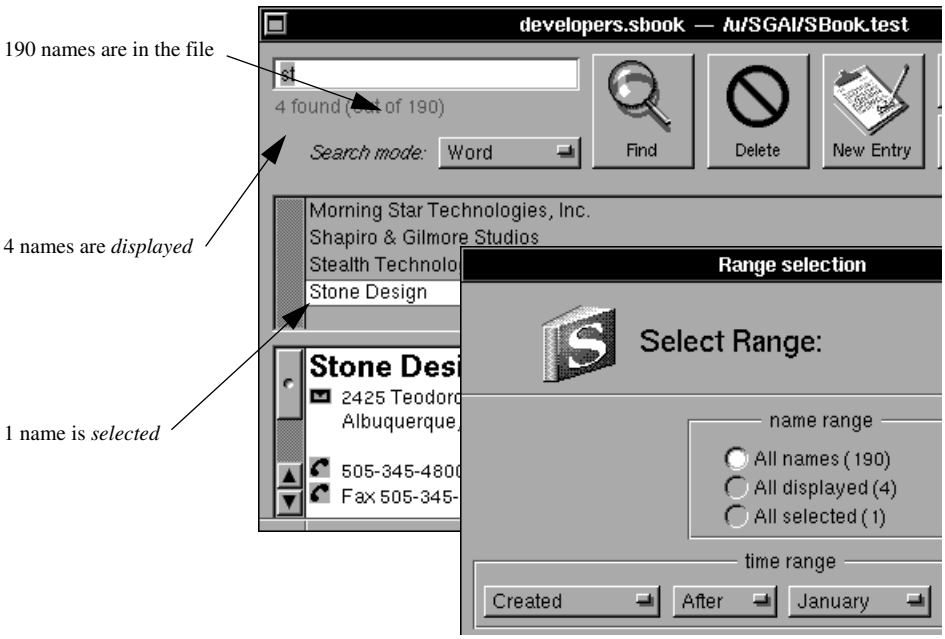
The Range Selection panel includes two subsections: the *name range*, and the *time range*. Only those entries that are chosen by *both* the name range and the time range will be included in the total range of entries.

The field labeled **Entries selected** at the bottom of the Range Selection panel displays how many entries are included in the total range.

When you are finished selecting a range, click the button labeled **OK** at the bottom of the panel, or just hit return. You can also cancel the range selection by clicking on the **Cancel** button.

Using the name range

The section of the panel labeled **name range** allows you to select a range of entries based on a previous search or selection.



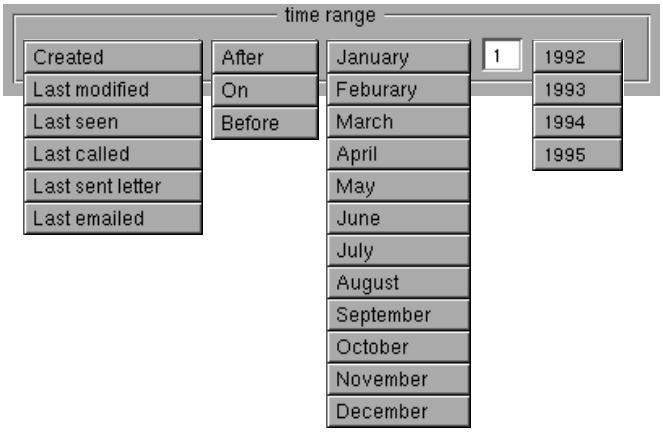
- When the radio button labeled **All names** is selected, the name range includes all of the entries in the file.
- When the radio button labeled **All displayed** is selected, the name range includes all of the entries that match the current search request and are currently displayed in the matrix.
- When the radio button labeled **All selected** is selected, the name range includes only those entries that are *selected* in the matrix.

Using the time range

The section of the panel labeled **time range** allows you to select a range of entries based on when they were initially created, last modified, last seen, or last contacted.

☞ If you want to use the time range, you must check the box labeled **Use time range** which is located just below the **time range** section. If this box is left unchecked, it will not matter what values are set in the **time range** section.

The **time range** section consists of several pop-up menus. You can select a time range by manipulating these menus, and by entering a date in the numeric field.



Clicking on the **SET TODAY** button below the **time range** section sets the month, date, and year in the **time range** section to today's date.

Building the report

As soon as you have selected a range, SBook starts to extract the relevant information from the entries you have chosen:

- For bulk email mailings, SBook must extract all the email addresses from the file.
- For address books and mailing labels, SBook must extract all the postal addresses and telephone numbers from the file.

This is a slow process, so it will take time for SBook to extract this information and design the report. If the range you have selected contains a large number of entries, it may take a few minutes.

While SBook builds the report, a panel labeled **Work in progress...** will appear on the screen with a circular gauge showing you how many of the selected entries have been processed. You can stop the process at any time by clicking on the button labeled **Cancel** just below the circular gauge.

If some of the entries need to be parsed, SBook will parse the entries before continuing with the report. This will slow down the report-building process. A message will appear in the lower left-hand corner of the Work in Progress panel, informing you that SBook is busy parsing.

Once SBook has parsed the entries that need to be parsed, it will keep information with the entries the next time the file is saved so that it will not have to do the parsing again.

☞ For more information on parsing, refer to "Parsing and icon placement" in Chapter 3.

SBook is parsing entries →

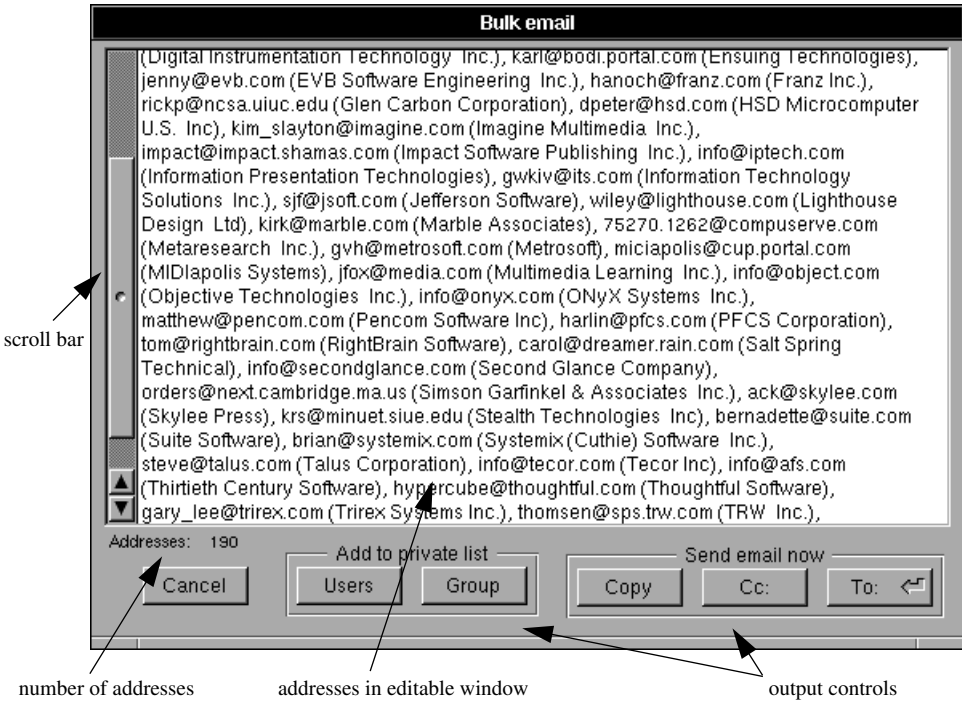
Once the information has been extracted and the report has been built, a panel will appear on your screen allowing you to view the report and modify it. Depending on which kind of report you chose, you will see a different panel. The next three sections, "Bulk email mailings," "Address books," and "Mailing labels," explain how to use these three different panels to view, modify, and output reports.

Bulk email mailings

The simplest kind of report is a bulk email mailing. When SBook has built the bulk email report, you will see a simple panel on the screen titled **Bulk email**. This panel contains all of the email addresses from the entries in the range you chose. The number of addresses appears in the lower left corner of the panel.

☞ If an entry contains more than one email address, all of the email addresses contained in the entry will appear in the list, not just the first one.

You can scroll through the panel to view all of the email addresses. Each address is followed by the entry's name in parentheses, just as if you had clicked on the email icon to send email to that address.



If you wish to add, remove, or modify addresses before you make the bulk mailing, you can edit the panel directly in the usual way.

Once you are satisfied with the addresses on the panel, you can use the output controls in the box labeled **Send email now** at the bottom of the panel to make a bulk email mailing.

- Click on **Send** (the default) to place the addresses in the To: field of a message.
- Click on **Cc:** to place the addresses in the Cc: field of a message.
- If you need to place the addresses in the Bcc: field of a message, or in a file (to make a mail alias, for example), click on **Copy** to copy them to the pasteboard.

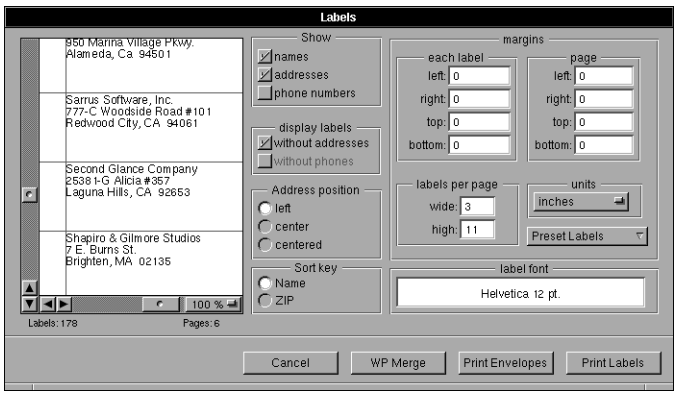
☞ If the list is more than 1000 characters in length, a bug in NeXTmail may terminate the list when it is placed in one of these fields.

The output controls in the box labeled **Add to private list** allow you to add the email addresses in this panel to Mail.app's private email list.

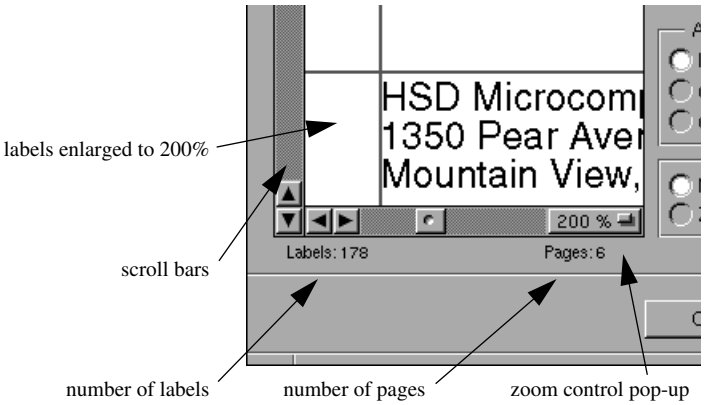
- Click on **Users** to add all of these addresses individually.
- Click on **Group** to add all of these addresses as a group.

Mailing labels

When SBook has built a mailing labels report, you will see a panel on the screen labeled **Labels**. This is a complex panel with numerous controls that allow you to scroll through the labels, zoom in and out, change what is displayed, and change the format of the labels.



The left side of the panel contains a scrolling window so that you can view the labels as they will be printed. A zoom control pop-up menu allows you to zoom in to view the labels up close, or zoom out to look at a whole page of labels.

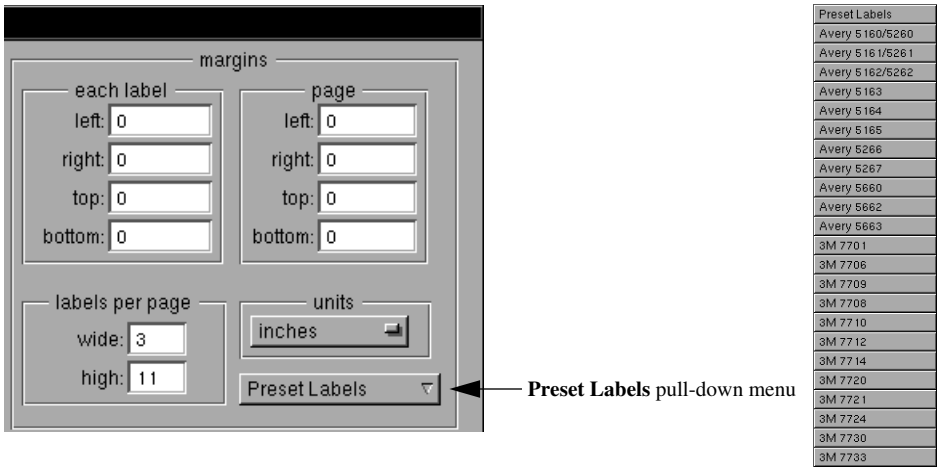


☞ The lines that you see surrounding the mailing labels in the window only appear so that you can easily see where SBook is laying out the borders of the mailing labels. These lines will not appear when the mailing labels are printed.

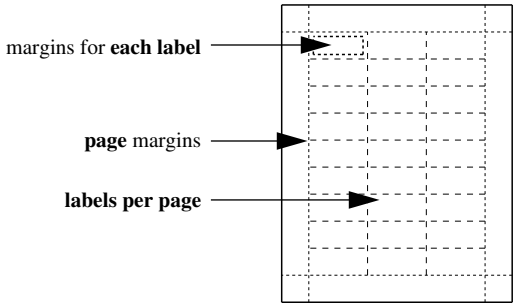
The right side of the panel contains controls for changing what is displayed and the format of the labels. As soon as you change the settings, SBook will immediately reformat the labels and display them. This makes it especially easy to set up the format you prefer because you can experiment with different formats until you find one you like.

Choosing the correct page format

SBook has twenty-three preset formats for standard Avery and 3M sheets of laser printer labels. You can choose between these preset formats by selecting a choice from the pull-down menu labeled **Preset Labels**. Avery and 3M labels are listed by number on this list.



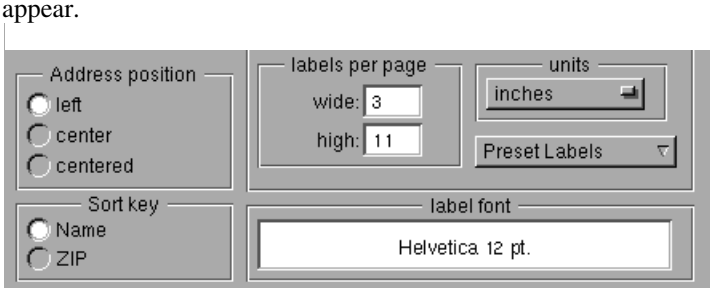
If you are using labels that do not appear on the list of presets, or if you want to adjust a particular preset format to suit your preferences, you can manually change the label format by changing the values in the fields labeled **each label**, **page**, and **labels per page**.



- The section labeled **each label** controls the margins on all four sides of the text in each label. SBook scales the contents of each label to fit within the margins, and changes the font size if necessary.
- The section labeled **page** controls the margins for the page.
- The section labeled **labels per page** controls how the page is divided into labels. You should enter the number of *columns* of labels in the field labeled **wide**, and enter the number of *rows* of labels in the field labeled **high**. SBook divides up the page so that all the labels are equal in size.

Deciding how the labels are formatted

The sections labeled **Address position**, **Sort key**, and **label font** determine how the labels themselves appear.



The section labeled **Address position** determines where the name and address information appears on each label. You can choose **left**, **center**, or **centered**:

left

Simson Garfinkel & Associates, Inc.
521/2 Pleasant Street
Cambridge, MA 02139

center

Simson Garfinkel & Associates, Inc.
521/2 Pleasant Street
Cambridge, MA 02139

centered

Simson Garfinkel & Associates, Inc.
521/2 Pleasant Street
Cambridge, MA 02139

The section labeled **Sort key** determines whether the labels appear sorted by name or by zip code. When sorted by name, labels appear in the same order as they do in your file.

The font well labeled **Label Font** allows you to change the font used for printing the labels. Double-clicking on the font well brings up the standard Font Panel.

Deciding what is displayed

The sections labeled **Show** and **display labels** determine what is displayed in the labels.

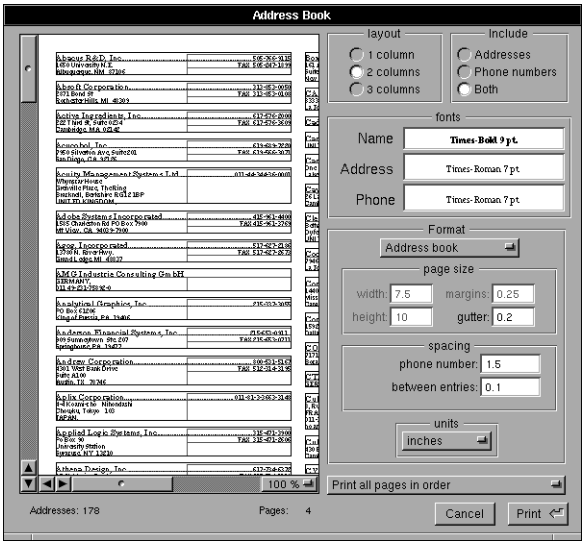
The section labeled **Show** determines whether the labels show names only, addresses only, phone numbers only, or a combination of the three.

The section labeled **display labels** determines whether SBook displays labels for *only* those entries containing *all* the information you have selected to be shown, or for all of the entries, even if they are missing names, addresses, and/or telephone numbers.

For example, if you are printing labels to be mailed, you will want to show names and show addresses, and you will not want to display labels without addresses.

Address books

When SBook has built an address book report, you will see a panel called **Address Book**. This is a large and complex panel like the **Mailing labels** panel; nevertheless, because (like the **Mailing labels** panel) it allows you to experiment with its settings and view the corresponding changes immediately, it is very easy to use.

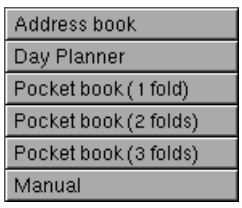


The left side of the panel contains a scrolling window, which works just like the **Mailing labels** panel, so that you can scroll through the address book and zoom in and out.

The lines that you see surrounding the parts of text in the window only appear so that you can easily see where SBook is laying out the fields for names, addresses, and phone numbers. The only lines that will print in the finished address book are the dotted lines that link names to phone numbers.

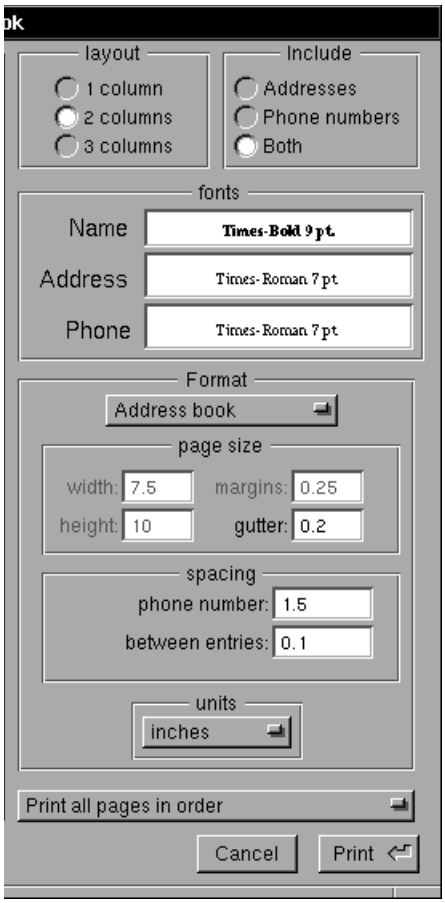
Choosing a format for the address book

The primary control for formatting an address book is the pop-up menu that appears at the top of the section labeled **Format**. This pop-up menu allows you to choose between five different preset formats, or choose **Manual** to create a format for unusually sized pages.



When you switch between the different preset formats on the pop-up menu, the settings on the rest of the panel that control formatting change to the defaults for the format you have chosen. For example, the defaults for the **Address book** menu option are shown below.

Whether or not you want to use a preset format, you can use the controls on the right side of the panel to change the format of the address book and decide what is displayed.



The **layout** section at the top of the panel allows you to select the number of columns.

The section labeled **Include** is the only one that affects what is displayed. Click on the appropriate radio button to display addresses, phone numbers, or both.

The **Fonts** section allows you to change the fonts for names, addresses, and phone numbers. Double-clicking on any of the three font wells will bring up the standard Font Panel.

In the **Format** section, the **units** menu allows you to choose between inches, centimeters, points, and picas. There are also six fields that allow you to adjust formatting:

The **width** and **height** settings determine the dimensions of each page.

The **margins** setting determines the margins around the text on each page.

The **gutter** setting determines the space between columns on each page.

The **phone number** setting determines the width allocated to phone numbers.

The **between entries** setting determines the vertical space between entries.

If you want to use a preset format, but you do not want to use all of the default settings for that format, almost all of the settings can be changed. The only settings you cannot change are those that control the size of the page; those settings are just below the pop-up, in the section labeled **page size**, and they are grayed out when a preset format is selected.

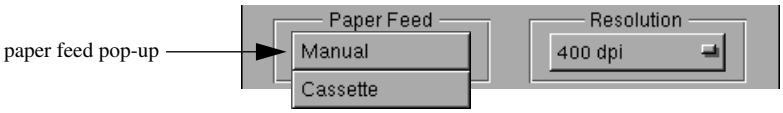
If you want to use a different page size, however, you must choose the last option on the menu, **Manual**, and then adjust the **page size** settings to the sizes you require.

Printing double-sided address book pages

If you are printing a **Pocket book**, either one-fold, two-fold, or three-fold, you will have to print double-sided pages.

You can print double-sided pages in two different ways. At the bottom right corner of the Address Book panel, you should see a pop-up menu controlling double-sided printing:

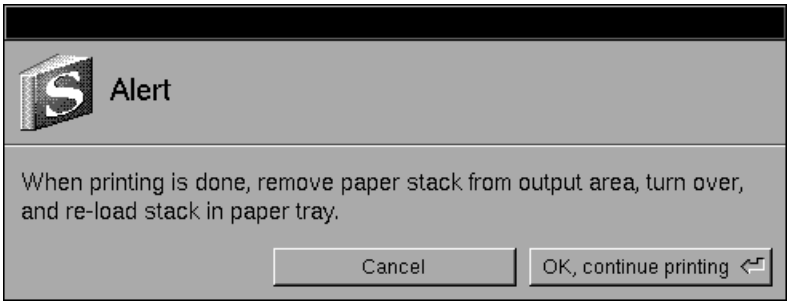
If you choose to **print all pages in order**, and then click on **Print** to print the book, you will be presented with a standard Print panel.



Switch the paper feed pop-up to **Manual**. Then click on **Print** to start printing.

1. When your NeXT computer prompts you for the first page, feed a sheet of paper into the printer, using the manual feed slot.
2. Wait for the sheet to come out of the printer, then feed the sheet of paper back into the printer, with the *same leading edge* as before, but with the *blank side up*.
3. Repeat this process until the entire book is printed.

On the other hand, if you choose to **print tops, then bottoms**, you do not need to use manual feed. Click on the Address Book panel's **Print** button, then click again on the Print panel's **Print** button to begin printing. SBook will print the top sides of all the pages from the paper cassette, and you will see the following alert panel:



Following the directions on this panel, wait for SBook to finish printing the top sides of the sheets, then turn the stack over so that the sheets are stacked in the paper cassette with the *same leading edge* as before, but with the *blank side up*. Then click on **OK, continue printing** to print the bottom sides of the sheets.

Assembling pocket books

Once a pocket book is printed, you must assemble it. SBook prints folding and stapling instructions right on the pages so that assembling is easy to do:

1. Find the dotted line labeled **first fold** on the page. Fold the page along that line so that the fold line appears on the *outside* of the fold.
2. If you are making a two-fold or three-fold pocket book, fold along the **second fold** and/or **third fold** lines in the same way as the first fold, always making sure that the fold lines fall on the *outside* of the fold.
3. If your pocket book consists of more than one sheet of paper, fold all the sheets the same way as the first. Then stack all the folded sheets together, with all the final folds forming the "spine" of the book. Make sure the sheets are stacked together in the right order, with page numbers coming out correctly.
4. On the outside of the final fold, you will see instructions to **staple** in two or three places along the fold. Staple all of the sheets together in the places indicated, making sure that the top of each staple falls on the *outside* of the fold.
5. Using a pocket knife or a letter opener, slice open all of the folded pages except for those along the spine. You now have a completed pocket book!

6

Managing your SBook files

This section covers SBook's file operations. In this chapter, you will learn how to:

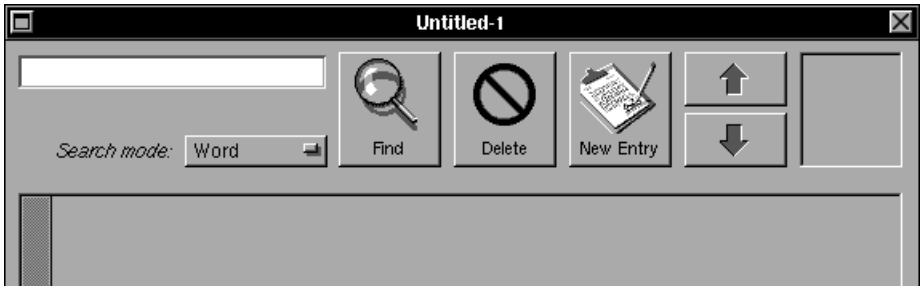
- Create, open, save, and close SBook files;
- Prevent files from being inadvertently changed, even when several people are sharing the same file;
- Recover lost or modified information by reverting to an earlier version;
- and import and export files in different file formats, including the NeXT fax list.

☞ This chapter does not cover the use of the export well on SBook's main window. Refer to "Transferring groups of entries" in Chapter 2 for information on the export well.

Basic file operations

Creating new files

To create a new SBook file, go to the **File** menu and choose **New**, or type the shortcut, **command-N**. A new window will appear named Untitled.

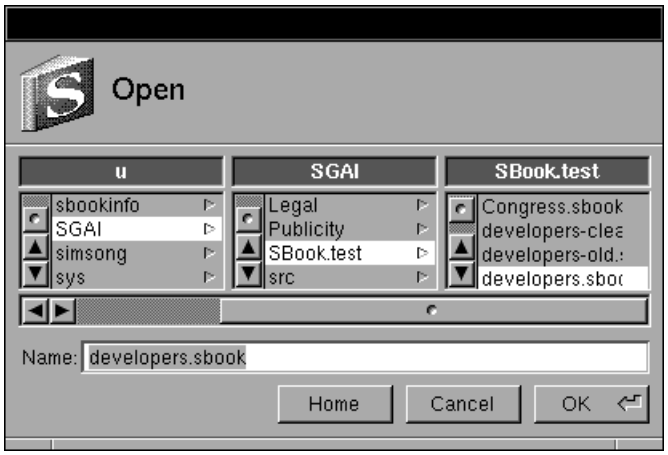


☞ You need to make a new entry before you can start typing information into SBook. See "Creating and deleting entries" in Chapter 2 for details.

Opening files

You can open a pre-existing SBook file by double-clicking on the file's icon in the File Viewer. If SBook is not running, Workspace will automatically launch it for you.

Or you can open a pre-existing file from within SBook by going to the **File** menu and choosing **Open**, or typing the shortcut, **command-o**. A standard Open panel will appear on the screen. Choose a file in the usual way, and click on **OK**.



☞ You can choose to open a file *read-only* by choosing **File>Open read only** (**command-O**). When you open a file read-only, SBook will not allow you to make any changes to the file: see "Locked entries and read-only files" on Page 72.

☞ You can set up SBook so that it will automatically open certain files as soon as it is launched: see "Designating files to be opened at launch" on Page 74.

Saving files

SBook's **File** menu offers three options for saving files: **Save**, **Save As...**, and **Save All**. These commands work as their counterparts do in other NeXT applications:

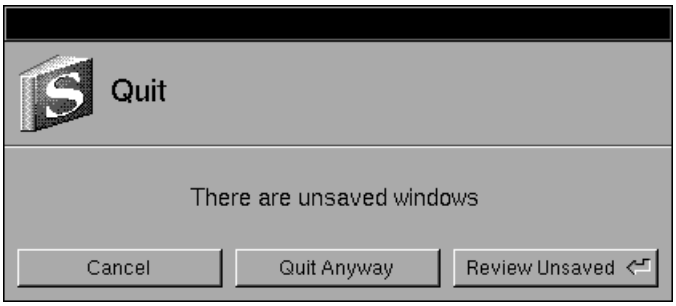
- **File>Save As...** (**command-S**) presents you with a standard Save panel. Specify a file name and location, then click **OK** to save the file.
- **File>Save** (**command-s**) causes SBook to save the file quietly with its current name and location, if that is possible. If the file is new, you will be presented with a Save panel (as if you had chosen **File>Save As...**).
- **File>Save All** will cause SBook to save all open files that need to be saved, just as if you had chosen **Save** for each one of them.

Closing files

You can close the currently selected SBook file by clicking on the close button of its window, or with the menu options **File>Close** or **Windows>Close**.

When you close a file with unsaved changes, SBook will ask you if you want to save the file. Click **Save** (the default) to save the file, **No** to close the file without saving it, or **Cancel** if you prefer not to close the file after all.

If you quit SBook without saving all open files, SBook will inform you with an alert panel:



If you choose **Review Unsaved**, SBook will present you with each unsaved file and allow you to decide whether you want to save that file's changes before you quit.

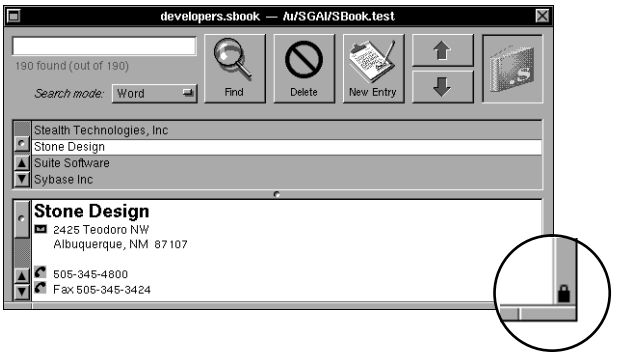
Preventing and reverting unwanted changes

SBook incorporates several safeguards to prevent inadvertent data loss. This is especially important when several people share a single SBook file. When you know that information stored in an entry or file is correct and should not be modified or deleted, you can choose to lock that entry or open that file read-only. Even if you do make unwanted changes, SBook allows you to revert an entry or file to the last saved version, or a backup version.

☞ Regardless of any built-in safeguards, SBook cannot prevent data loss in the case of hard disk failure. We strongly suggest that you also make backups of all your files to floppy disks or tape.

Locked entries and read-only files

You can lock a selected entry, or group of entries, by choosing **Edit>Entry>Lock entry** (**command-L**). When you display a locked entry, SBook will not allow you or anyone else to make any changes or delete that entry. A small icon will appear in the lower right corner of the SBook window to show you that this entry is locked:



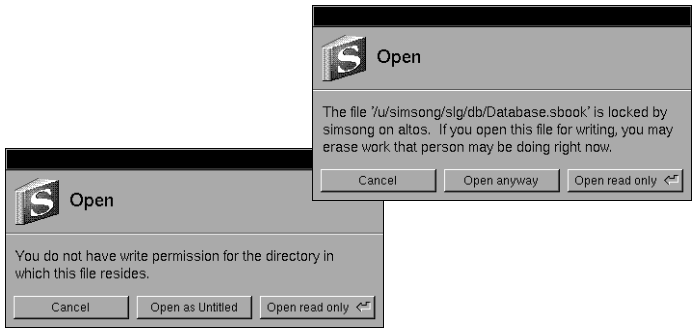
lock icon

The entry will remain locked until you unlock it with the corresponding command, **Edit>Entry>Unlock entry** (**command-L**).

If you want to prevent yourself from making unwanted changes to an entire file, you can open the file read-only (see "Opening files" on Page 70 and "Designating files to be opened at launch" on Page 74). When you open a file read-only, a lock icon appears in the lower right corner of the window at all times, even if no entry is currently selected.

Another way to prevent youself and others from making changes to a file is to set that file's permissions so that it is not writable. You can do this by selecting the file in the File Viewer, bringing up the Workspace Inspector by choosing **Tools>Inspector...** from the **Workspace** menu, and changing the permissions in the Inspector.

Even if you do not explicitly choose to open the file read-only, if another person is currently using the file, or if the file is write protected, SBook will warn you and allow you the choice of opening the file read-only, or opening an untitled copy. This prevents you from making accidental changes to a shared file.



Reverting to the last saved version

If you make unwanted changes to a file, such as deleting entries, you can undo these changes and revert the file to the last saved version by choosing **File>Revert to saved**. SBook will present you with an alert panel to confirm that you really want to lose all the changes you made since the file was last saved. *This command is equivalent to closing the file without saving it, then opening it again.*

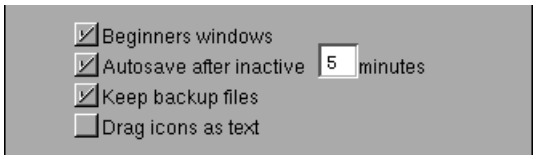
☞ Choosing **File>Revert to saved** will create a new backup file that overwrites any previous automatic backup file. If you are not sure which version is the one you want to restore, save the automatic backup file under another name *before* you choose **File>Revert to saved**.

If you accidentally save a file with unwanted changes, you can still revert the file to a previous version, if a backup was made. By default, SBook automatically makes a backup file whenever a file is opened. If you need to restore a file from a backup version:

1. Use **File>Open** (**command-o**) to open the backup file. Automatic backup files have the same names as the files they were created from, but they end in ".sbook~" instead of ".sbook" and do not show up in the Open panel's browser, so you will have to enter the filename manually.
2. Check to see that this is the version you prefer, then choose **File>Save as...** (**command-S**) and delete the "~" character in the filename before you click **OK**.

So that you do not lose information accidentally, SBook has an autosave feature. By default, SBook automatically saves open files after 5 minutes of inactivity.

You can change these defaults in SBook's **Preferences** panel. Bring up the Preferences panel by choosing **Info>Preferences...** and select **General** from the pop-up menu at the top of the panel. You should see two checkboxes in the center of the panel:



- The checkbox labeled **Autosave after...** determines whether autosaving is turned on, and if so, how many minutes of inactivity pass before SBook autosaves.
- The checkbox labeled **Keep backup files** determines whether SBook automatically makes a backup file when each file is opened.

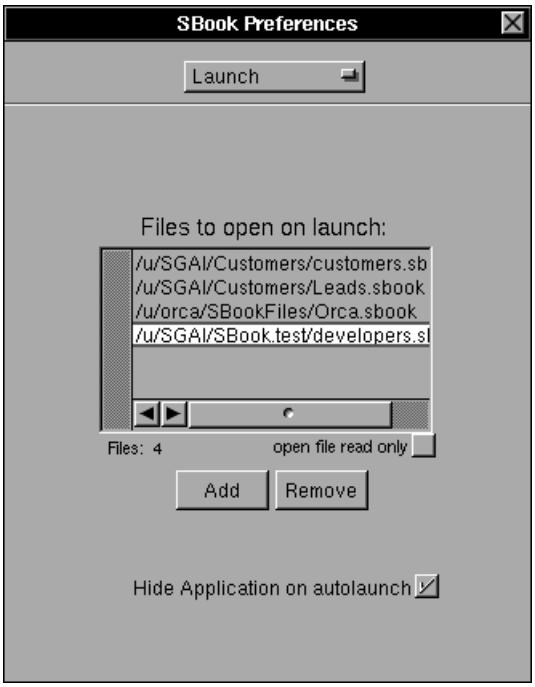
For more information about using SBook's **Preferences** panel, refer to "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands*.

Designating files to be opened at launch

SBook can be set up so that every time it is launched, it automatically opens a particular file or files. This is controlled by the **Launch** subview of the **Preferences** panel.

☞ For a complete description of SBook's **Preferences** panel, refer to "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands*.

You can view and change SBook's launch settings by choosing **Info>Preferences**, then changing the pop-up menu at the top of the **Preferences** panel to **Launch**. In the scrollable field labeled **Files to open on launch:** you will see a list of all the files marked to be opened on launch. (By default, no files are marked to be opened on launch.)



Clicking on the button labeled **Add** brings up a panel that is just like a standard Open panel, except that it is named **Add autolaunch file**. Choose a file in the usual way, and click on **OK**. Once the file is added, you will immediately see it appear in the **Files to open on launch:** field.

☞ If you want a particular file to open as a *read-only* file when SBook is launched, select the file in the field, then check the **Open file read only** box. This is useful when you share files with others. See "Locked entries and read-only files" on Page 72 for more information.

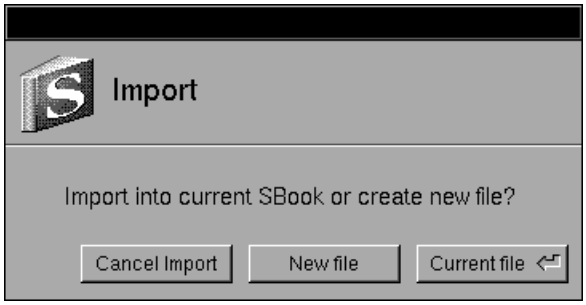
You can delete a file from the **Files to open on launch:** field by selecting the file in the field, then clicking on the button labeled **Remove**. You will be presented with an alert panel in which you will need to confirm whether you really want to remove the file from the field. Clicking **Yes** (the default) will remove the file.

At the bottom of the **Launch** subview, the checkbox labeled **Hide application on auto-launch** determines whether SBook hides itself when it is automatically launched from your dock or otherwise. By default, this button is checked.

Importing files

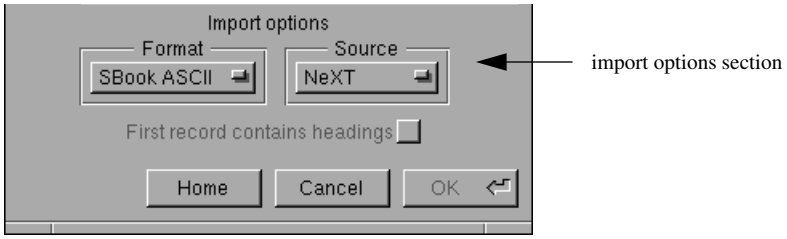
We have tried to make it as simple as possible to import files into SBook so that you can start using your existing databases right away with a minimum of conversion time. Most of your address databases should easily convert over to SBook format. If you do have trouble, read "If importing fails" on Page 78. Keep in mind that, in addition to technical support, we also offer hand conversion as a service to our customers; contact us for details.

To import a file, go to the **File** menu and choose **Import...** If there is a currently selected SBook window, a panel labeled **Import** will appear asking if you want to import into that file, or create a new file. (If there are no windows open, the panel will not appear.)



When you click on **Current file** (the default) or **New file**, another panel labeled **Import** will now appear, allowing you to choose the source file. This panel is just like a standard Open panel, except for a small section labeled **Import options** near the bottom of the panel. It is important to make sure the import options are set correctly.

☞ Import options are described in detail in the following two subsections, "File formats" on Page 76 and "File sources" on Page 78.



When you have chosen the file and set the options, click on the **OK** button at the bottom of the panel. SBook will now start to import the file. As the file is imported, you will see a panel displaying how many entries have been imported so far:

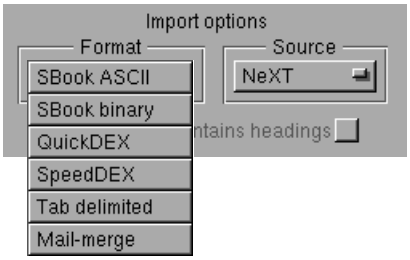
After the file has been successfully imported, SBook will inform you with an Alert panel displaying the total number of entries that were imported.

Now you will want to check to make sure the file was imported correctly. Check that the number of entries corresponds to the number of records in the original database. Look through the file and display a few entries to be sure that they appear correct in the file. Are the entries formatted properly, with appropriate line breaks? If any of these seem incorrect, try changing the import options, or take a look at "If importing fails" on Page 78.

File formats

When importing a file, it is important to specify to SBook the format it is written in so that it can be converted properly. Make sure that the file format pop-up menu in the Import Options section of the Import panel is set correctly for your file.

file format menu



The first four of the six formats are used for importing from free-format databases, and the last two are used for importing from fixed-format databases.

If you are importing from a free-format database, you have the following choices:

- **SBook binary**: This is the format that SBook document files are written in. We use NeXTSTEP's "typedstream" facility, so you can easily move SBook binary files between NeXTSTEP on a NeXTstation and NeXTSTEP/486 without any conversion.

☞ You don't need to use **File>Import** to import an SBook document file. Just drag the file's icon into an open SBook window, and SBook will automatically import the file. Refer to "Transferring groups of entries" on Page 20 for more details.

- **SBook ASCII**: An easy to read ASCII format in which SBook can export files. Entries are stored exactly as they appear in the display, line breaks and all, except that instead of Rich Text they are plain ASCII. Entries are separated from each other by lines of equal signs.
- **QuickDEX**: The format used by QuickDEX, a popular Macintosh free-format database. This format is very similar to SBook ASCII, except that different delimeter characters are used. SBook will automatically convert Macintosh graphical characters to their corresponding Display PostScript characters on import.
- **SpeedDeX**: SpeedDeX is a NeXT free-format database. This menu choice is for importing files written in the special format that SpeedDeX uses (files ending in ".dex"), *not the ASCII or RTF formats that SpeedDeX exports.*

If you are importing from a fixed-format database, you have the following choices:

- **Tab delimited**: A format used by DataPhile and most Macintosh-style databases. Generally, the first line of the database contains a list of field names. Each subsequent line corresponds to one record, in which the fields are separated by tabs. Fields that contain the "tab" character must be enclosed by quotation marks.
- **Mail-merge**: A format used by dBase and most PC-style databases. This is like tab delimited except that the fields are separated by commas rather than tabs. Fields that contain commas must be enclosed by quotation marks.

If you choose one of the two fixed-format options, the box labeled **First record contains headings** will be activated (it is normally grayed out).

check this box if appropriate

Checking this box will cause SBook to assume that the first line of your database contains a list of field names, preventing it from erroneously importing that line as a separate entry. In addition, SBook will try to make sense of the field names as best it can, so that the database will be formatted in a reasonable way once it is imported. If the database contains separate fields for first and last names, for example, SBook will concatenate the parts together so that they do not appear on two separate lines.

Finally, if your file does not seem to correspond to any of the five formats that SBook supports, try going back to the database program that created the file and exporting in a different format. Most database programs can export in at least one of these formats. If you cannot find a format common to your database program and SBook, skip to "If importing fails" on Page 78.

File sources

Another option you need to set when you import a file is the *source*. A file that is created in Macintosh file format, for example, has a slightly different character mapping from one that is created on the NeXT or under Unix. In order for SBook to do the conversion, you must make sure that the correct file source is chosen.

file source menu

Some file formats cause SBook to set the file source automatically. If you have chosen either **SBook ASCII** or **SBook binary** file format, the file source is automatically set to be **NeXT**. If you have chosen **QuickDEX** file format, the file source is set to **Macintosh**.

If importing fails

If *the number of records in the original database does not correspond to the number of entries imported*, or *each entry appears on one long line*, or *characters in the file appear incorrectly* (especially accented or other special characters):

1. You probably have set the **file format** and/or **file source** pop-up menus incorrectly. Check these settings and try again.
2. If you cannot get the file to import correctly by correcting the settings, your file may be in a format that SBook cannot import, or the file may be corrupted. Try exporting the file again from the original database application. You may be able to find a different export format that can be imported by SBook.

If *entries appear to be mixed up*, with parts of the name, address, or phone number appearing in the wrong order, or *line breaks are too frequent*, with each entry appearing in too many broken up lines:

1. The file is probably in either tab-delimited or mail-merge format, and the fields are not set up conveniently for SBook. Try exporting the file again from the original database application. You may be able to concatenate or rearrange fields so that when your file is imported, it will appear more as you desire.
2. If you cannot get the fields rearranged by exporting the file again, take a look at the file with an editor like Emacs. Note the delimiters (tabs or commas) separating the fields. Make a copy of the file, then try editing the copy, moving the fields around and adding or removing delimiters. You may be able to edit the file in this way so that it will look better once it is imported.

3. You can also try exporting the file in SBook ASCII format, editing the file with Edit or Emacs, then importing the file again. This may be easier than editing the raw file before it is imported, because SBook ASCII is a very easy-to-read format.

If all else fails, we will convert any database by hand for a nominal charge. If we are unable to convert your database, or if we determine that the trouble you were having was due to a bug in SBook, you will not be charged. Contact us for details.

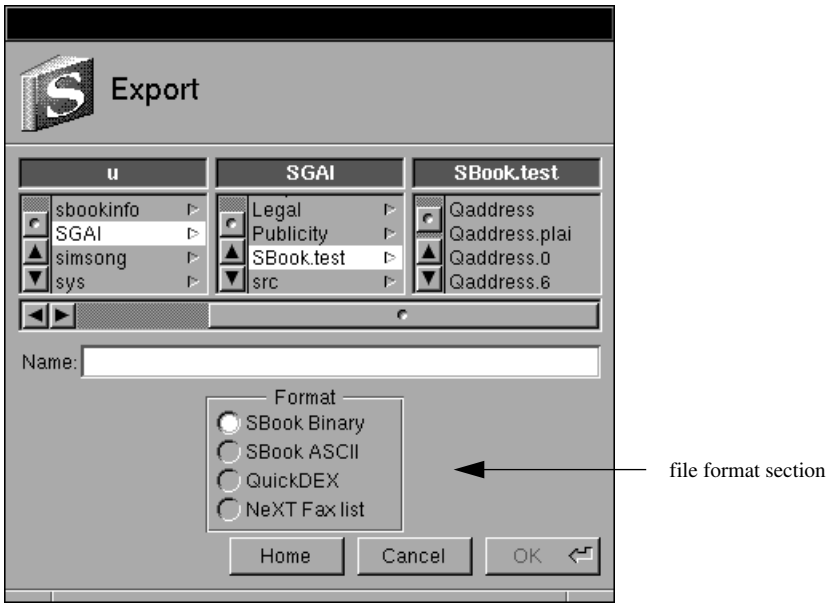
Exporting files

To export a file, make sure the file you want to export is open and selected, then go to the **File** menu and choose **Export...** (If there is no open and selected file, this menu option will be grayed out. Open the file you want to export and try again.)

Because you may not want to export all of the entries from this file, you will automatically be presented with the Range Selection panel. Choose a range from this panel and click **OK**.

☞ For complete information on how to use the Range Selection panel, refer to "The Range Selection panel" in Chapter 5.

Once you have selected a range, a panel labeled **Export** will appear, allowing you to choose the destination file for the export. This panel is just like a standard Save panel, except for a box labeled **Format** at the bottom of the panel, which allows you to choose the file format you want for the exported file.



Choose the destination file in the usual way, and make sure the file format pop-up menu is set up in accordance with your preference.

The file format section on the Export panel contains the following options:

- **SBook binary**: This is the format that SBook document files are written in. We use NeXTSTEP's "typedstream" facility, so you can easily move SBook binary files between NeXTSTEP on a NeXTstation and NeXTSTEP/486 without any conversion.

☞ You don't need to use **File>Export** to export to SBook binary format. Just drag and drop the document file icon out of the window's file well, and SBook will automatically export the file. See "Transferring groups of entries" on Page 20.

- **SBook ASCII**: An easy to read ASCII format in which SBook can export files. Entries are stored exactly as they appear in the display, line breaks and all, except that instead of Rich Text they are plain ASCII. Entries are separated from each other by lines of equal signs.
- **QuickDEX**: A format used by QuickDEX, a popular Macintosh free-format database. This format is very similar to SBook ASCII, except that different delimeter characters are used. SBook will automatically convert Display PostScript characters to their corresponding Macintosh graphical characters on export.
- **NeXT Fax list**: This is the format used for the list of fax numbers shared by all applications under NeXTSTEP 3.0. See the next section, "Exporting fax numbers to the NeXT fax list," for details on exporting to this format.

☞ You may notice that this list *does not* include the rigid formats that are used by fixed-format databases, such as tab-delimited and comma-delimited. This is due to the free-format nature of SBook files. For example, an SBook file could not be exported into a format requiring one address and one phone number in each entry, because your SBook entries may contain any number of addresses and phone numbers, as well as other information.

When you have chosen the destination file and set the file format correctly, click on the **OK** button at the bottom of the panel. SBook will now start to export the file. As the file is exported, you will see a panel displaying how many entries have been exported so far:

After the file has been successfully exported, SBook will inform you with an Alert panel displaying the total number of entries exported.

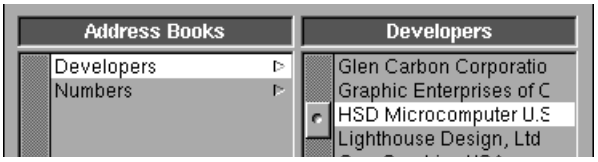
Exporting fax numbers to the NeXT fax list

You can use the fax numbers in your SBook file to fax documents from other applications. An easy and elegant way to do this is to export fax numbers in your file to the NeXT fax list.

When exporting, just click on the radio button labeled **NeXT Fax list**. The default location for your personal fax list is in your "~/Library/Addresses" directory; the Export panel will automatically jump to that directory when you select **NeXT Fax list** from the **Fornat** box:

You should already have a file named "Numbers.addresses" in this directory. If you are exporting more than a couple of fax numbers from your SBook file, we recommend that you establish a new file to hold the new numbers. For example, when exporting all the fax numbers from the "developers.sbook" demo file, you may want to create a new file named "Developers.addresses." Type the filename in the field, and click **OK** or press return.

Now when you send a fax from another application, you will see the new file and all the numbers in it from the Fax Panel, so that you can choose a recipient and send a fax:



☞ SBook uses its dialing rules so that it can export all telephone numbers to the fax list in the format you would normally dial them. See "Setting up SBook's dialing rules" in Chapter 4 for more information.

7

Logging what you do with SBook

If you need to keep track of the people you call or write to, or how much time you spend on the phone, you will want to use SBook's logging facility.

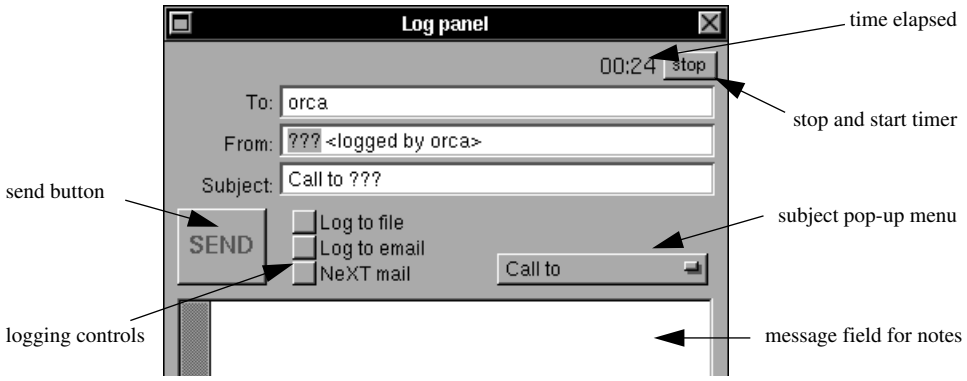
- SBook allows you to log the calls you make and the envelopes you print.
- You can also log memos or incoming calls by bringing up the log panel manually.
- You can have SBook send you log messages in email, or you can create a log file that can be imported into a time-billing system or a general purpose database.
- You can make notes to yourself right on the log panel, and they will appear in the email or file, so that you can keep track of what was said and done.

Getting started with logging

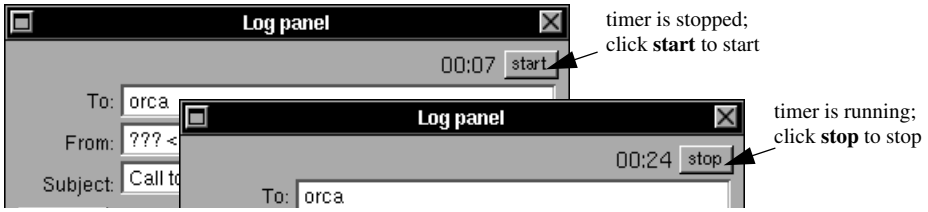
The simplest way to get started with logging is to log your calls, letters, and other messages *manually*. You can log any message by bringing up the Log panel with a command, or you can click on the Dialing Panel, or the envelope print panel, to log calls or letters.

The Log panel

To log an incoming call, memo to yourself, billable time, or other miscellaneous message, choose **Tools>Logging panel...** (**command-l**) to bring up the Log panel manually.

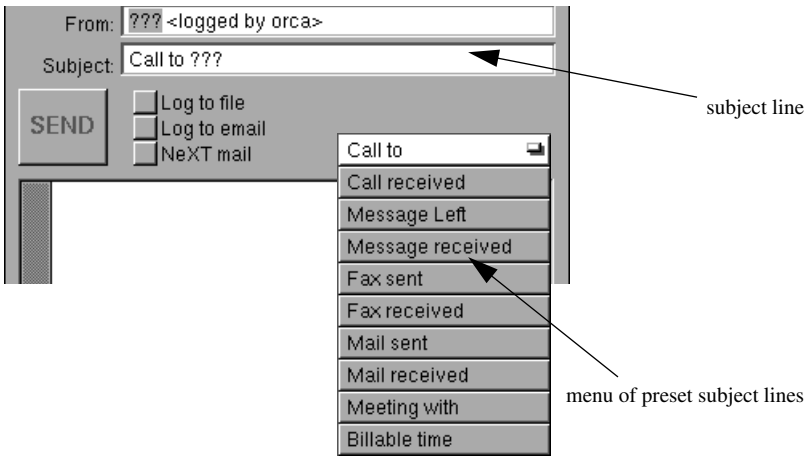


At the top of the panel, just under the close box, there is a timer with a stop/start button:

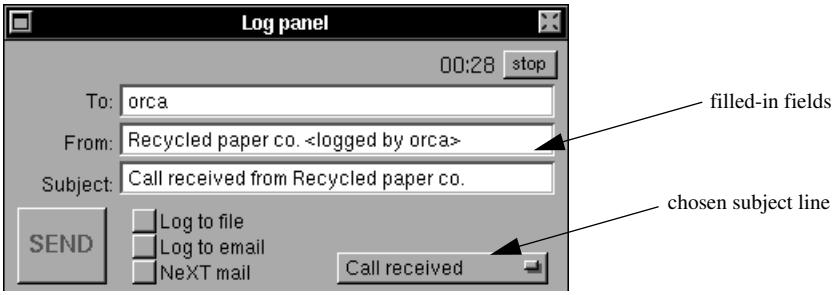


By default, the timer starts running as soon as you bring up the Log panel. You can stop the timer at any time by clicking on **stop**. Once it is stopped, you can start the timer again by clicking on **start**. SBook will record the total elapsed time in the log.

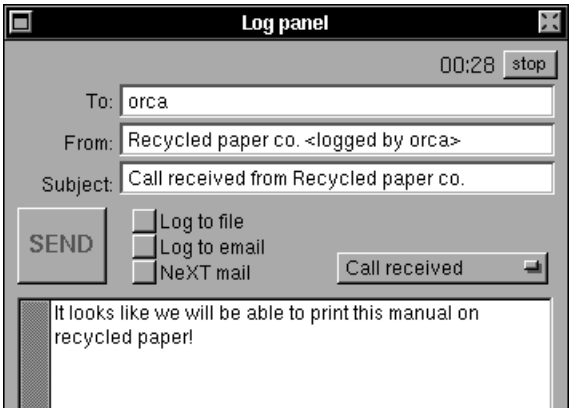
The subject line of the Log panel allows you to define the category of what you are logging: whether you are logging a telephone call, a message, a fax, or a reminder to yourself, or making a record of billable time. You can change the subject line manually, or by choosing from the variety of preset subject lines on the subject pop-up menu:



Once you have chosen the subject line, you can fill in the person you called or other relevant information in the **From:** line and **Subject:** line of the Log panel:

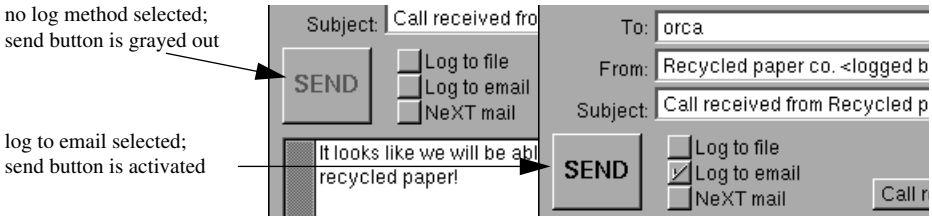


Fill in as many notes and other information as you wish in the scrollable message field on the Log panel. These notes will appear in the log, as well.



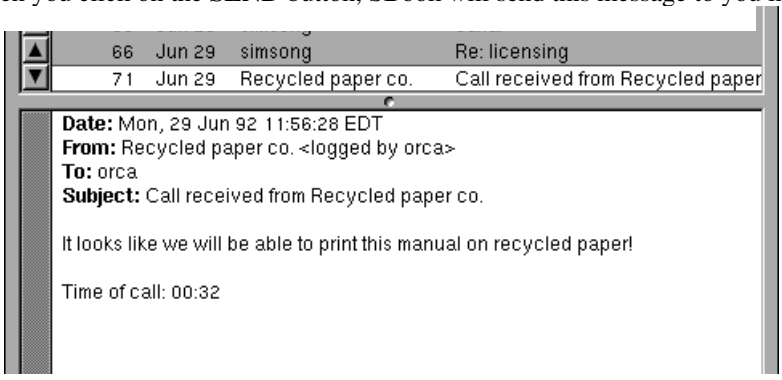
☞ If you want to make notes in Rich Text, you can check the box labeled **NeXTmail** just below the **Log to email** button.

When you are ready to log this note and return to SBook, check the box labeled **Log to email** next to the large button labeled **SEND**. The **SEND** button will become activated:



☞ Don't check the **Log to file** button yet. You cannot log to a file until you have a log file chosen in your Preferences. Refer to "Choosing the default logging method" on Page 88.

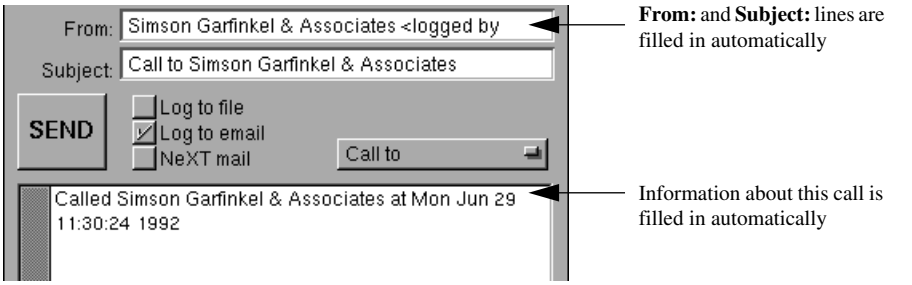
Now when you click on the **SEND** button, SBook will send this message to you in email:



Logging calls and letters manually

You can log any of your outgoing telephone calls by clicking on the **Log** button that appears on the right side of the Dialing Panel:

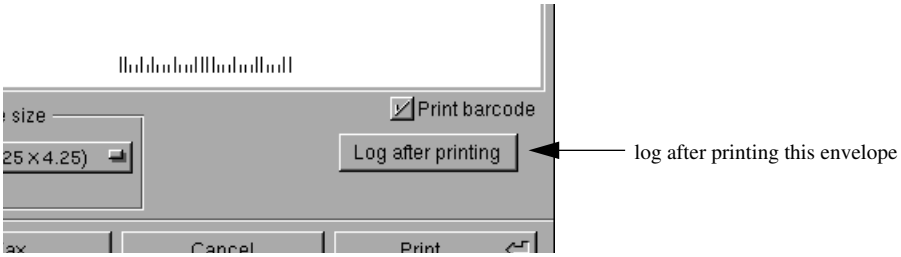
The Log panel will appear, as before, but with the **From:** and **Subject:** lines on the panel filled in appropriately:



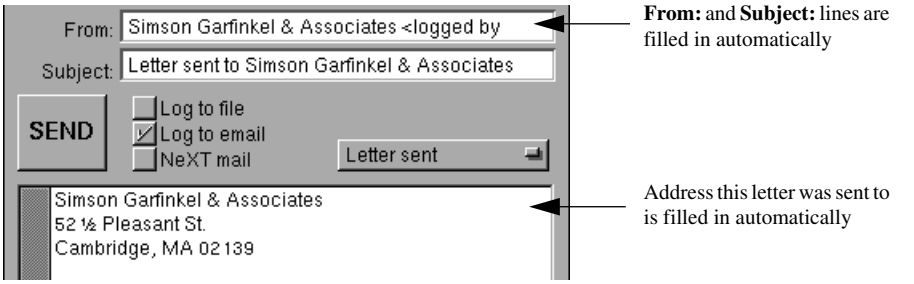
- The **From:** line is automatically filled in with the name of the person you called. This is taken from the name of the entry associated with the telephone icon you clicked on to make this call.
- The **Subject:** line is automatically filled in with the message that you made a telephone call to this person or organization.
- The message field of the panel is automatically filled in with all of the above information, as well as the date and time that SBook began dialing.

After you have added any notes you need in the message field, make a log to email in the usual way. The message will include the elapsed time, as before.

Likewise, you can log the letters you send by clicking on the **Log after printing** button that appears in the lower right corner of the envelope print panel:



As above, the Log panel will appear with the **From:** and **Subject:** lines on the panel filled in appropriately:



- The **From:** line is automatically filled in with the name of the person you sent this letter to. If you edited the envelope panel before printing this envelope, *the modified name from the panel*, rather than the original name, will appear in the log.
- The **Subject:** line is automatically filled in with the message that you sent a letter to this person or organization.
- The message field of the panel is automatically filled in with the complete address that you printed on this envelope. Again, this is taken from the *envelope panel*, not from the original entry.

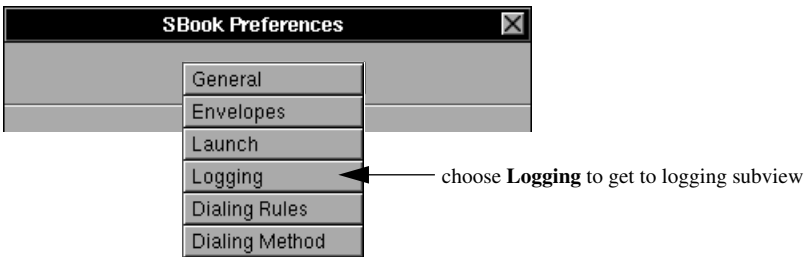
After you have added any notes you need in the message field, make a log to email in the usual way.

Changing your logging preferences

Once you are familiar with the Log panel, and you start to log your calls, letters, and other messages more frequently, you may want to have every call and letter logged automatically. Or you may want to start logging to one or more files, so that you can import your record of the people you called and the time you spent into a time-billing system or other database. To do these things, you will need to set up SBook's logging preferences.

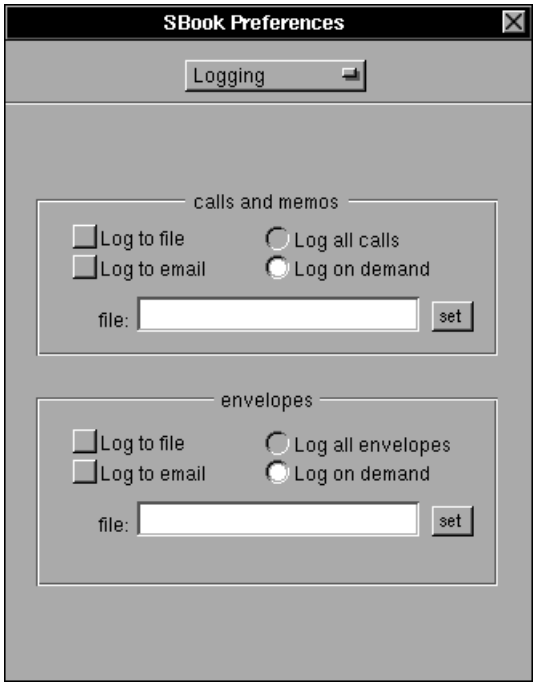
SBook's logging preferences

SBook's logging preferences are a subview of the Preferences panel. You can bring up the Preferences panel by choosing **Info>Preferences...** To get to the **Logging** subview, choose **Logging** from the pop-up menu at the top of the panel:



☞ You can find more information about the Preferences panel in "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands*.

The Logging subview contains two sections:

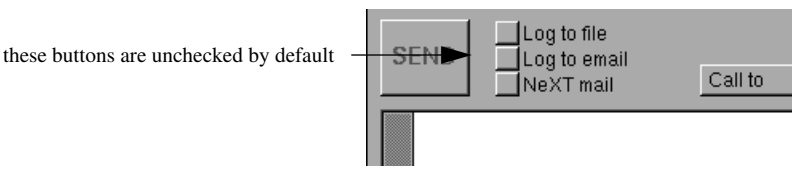


- The section labeled **calls and memos** determines how SBook logs your telephone calls and any messages you log by bringing up the Log panel manually.
- The section labeled **envelopes** determines how SBook logs your envelopes.

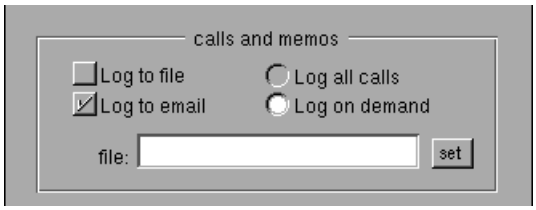
☞ Since the two sections are so similar, this section will only explicitly show you how to change the settings for **calls and memos**. You can change the settings for **envelopes** in exactly the same way.

Choosing the default logging method

By default, SBook does not check either the **Log to file** or **Log to email** buttons on the Log panel when it is brought up. You must check the appropriate box yourself before you click on the **SEND** button to log the message:

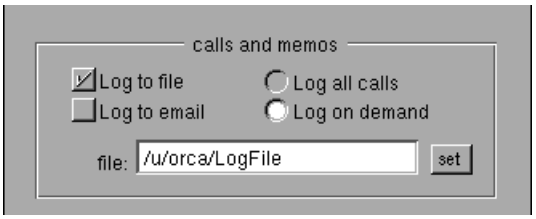


If you usually log to email, you can check the **Log to email** box on the Preferences panel. When this box is checked, the **Log to email** box on the Log panel is automatically checked for you every time you make a call or memo.



If you want to log to a file, you can check the **Log to file** box on the Preferences panel. When this box is checked, the **Log to file** box on the Log panel is automatically checked for you every time you make a call or memo.

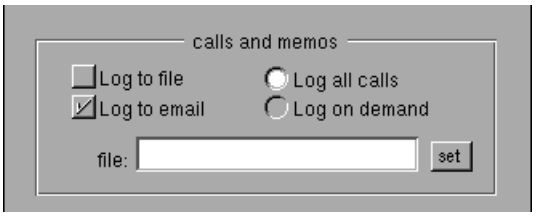
☞ To log to a file, you must set a log file. Click on the box labeled **set** next to the field labeled **file**. You will be presented with a panel just like a standard Save panel that is labeled **Set telephone log file**. Once you have chosen a file, the filename will appear in the **file** field.



If you want to log to a file *and* log to email, you can check both boxes.

Automatic logging

If you want to log *all* of your calls, you can select the radio button labeled **Log all calls**:

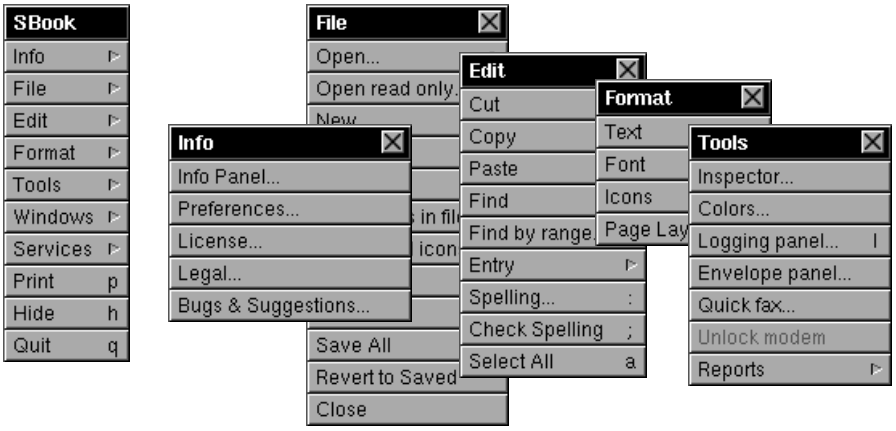


When the **Log all calls** button is selected, each time you make a call the Log panel will come up automatically, just as though you had clicked on the **Log** button on the Dialing Panel to log this call manually.

Appendix A: SBook's Menus and Menu Commands

This Appendix shows all of SBook's menus and menu commands, and refers to the parts of the main text in which they are described in detail. This Appendix also covers SBook's Preference panel and its subviews, and the **Services>SBook** menu.

The main menu

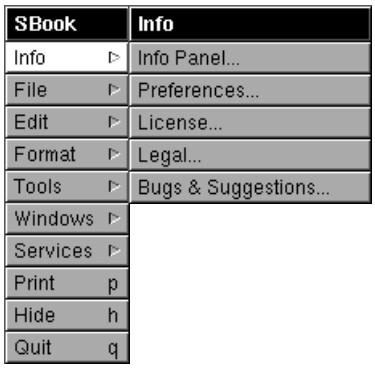


SBook's main menu contains five submenus which are described in this chapter: the **Info** menu on Page 92, the **File** menu on Page 93, the **Edit** menu on Page 94, the **Format** menu on Page 96, and the **Tools** menu on Page 97.

The main menu also contains five other standard menu items, which are not described in detail because they behave as their counterparts do in other NeXT applications:

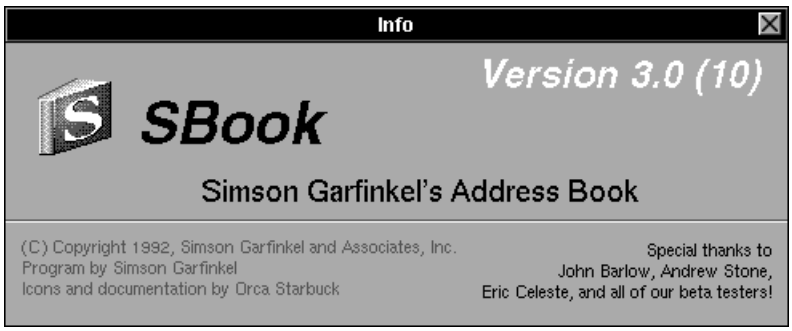
- The **Windows** menu allows you to select and arrange SBook's windows.
- The **Services** menu allows you to use services from other applications.
- The **Print** command allows you to print a currently selected entry.
- The **Hide** command causes SBook to hide itself.
- The **Quit** command causes SBook to close all files and quit.

The Info menu



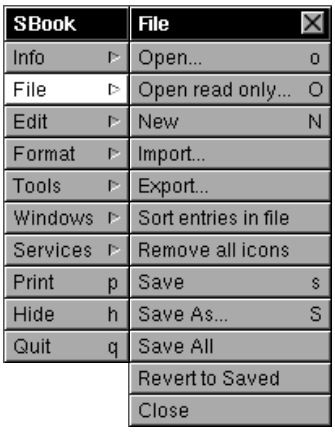
SBook's Info menu allows you to get information about SBook itself, whether this copy of SBook is licensed, what version you are using, and your license agreement. You can also change your preferences from this menu using the **Preferences...** command, and you can send us a suggestion or a bug report by using the **Bugs & Suggestions...** command.

- The **Info Panel...** command brings up SBook's Info Panel. This panel displays copyright and version information, and a few acknowledgements.



- The **Preferences...** command brings up SBook's Preferences panel. This is a complex panel with many subviews. It is decribed in detail in "The Preferences panel" on Page 98.
- The **License...** command brings up SBook's License panel. You can read about the License panel and get information about your license agreement in "The License Panel" in *Installing and Licensing SBook*.
- The **Legal...** command brings up a panel which allows you to scroll through SBook's single-user and network license agreements. These agreements are described and explained in "SBook Licenses" in *Installing and Licensing SBook*.
- The **Bugs & Suggestions...** command notifies the Mail application to bring up a new Send window, pre-addressed to us, for your bug reports and suggestions.

The File menu



SBook's **File** menu allows you to do various things to files. The following commands are described in Chapter 6, *Managing your SBook files*:

- The **Open** command (**command-o**) opens a pre-existing SBook document file. This commands is described in "Opening files" on Page 70.
- The **Open read only** command (**command-O**) opens an SBook document file with read only access. This command is described in "Opening files" on Page 70.
- The **New** command (**command-N**) creates a new SBook document file. This command is described in "Creating new files" on Page 69.
- The **Import...** command allows you to import files into SBook's file format. This command is described in "Importing files" on Page 75.
- The **Export...** command allows you to export files into other file formats, or to the NeXT fax list. This command is described in "Exporting files" on Page 79.
- The **Save** command (**command-s**) saves the currently selected file. This command is described in "Saving files" on Page 70.
- The **Save As...** command (**command-S**) allows you to save the currently selected file under a different filename. This command is described in "Saving files" on Page 70.
- The **Save All** command saves all open files that need to be saved. This command is described in "Saving files" on Page 70.
- The **Revert to Saved** command reverts the currently selected file to the last saved version of that file. This command is described in "Preventing and reverting unwanted changes" on Page 71
- The **Close** command closes the currently open file. This command is described in "Closing files" on Page 71.

The **File** menu also contains two commands that are described in Chapter 3, *Fine-Tuning Your SBook Files*:

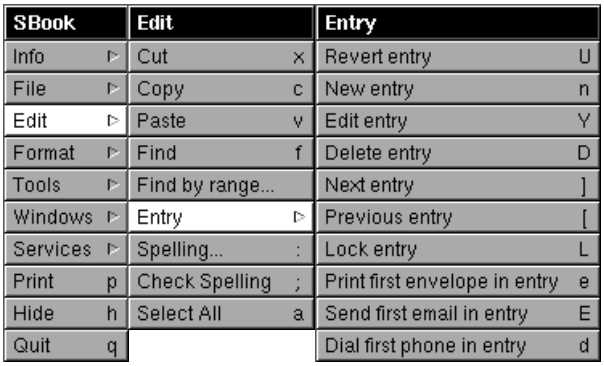
- The **Sort entries in file** command sorts all the entries in the currently selected file according to the current sort order. This command is described in "Automatic and manual re-sorting" on Page 25.
- The **Remove all icons** command removes all the icons in the currently selected file, including those that you have inserted yourself. This command is described in "Removing icons" on Page 29.

The Edit menu

SBook's **Edit** menu allows you to create, search for, and modify SBook entries:

- The **Cut** command (**command-x**), **Copy** command (**command-c**), and **Paste** command (**command-v**) are the standard NeXT commands that allow you to cut, copy, and paste entries and information. They are described in "Editing an entry" in Chapter 2.
- The **Find** command (**command-f**) selects the contents of the search field so that you can begin a new search. It is described in "Searching" in Chapter 2.
- The **Find by range** command brings up the Range Selection panel so that you can search for entries within a given range. The Range Selection panel is described in "The Range Selection panel" in Chapter 5.
- The **Entry** submenu allows editing of entries. It is described in "The Entry submenu" on Page 95.
- The **Spelling...** command (**command-:**) and the **Check Spelling** command (**command-;**) allow you to check the spelling of words in an SBook entry.
- The **Select All** command (**command-a**) selects all the entries in the currently selected SBook file.

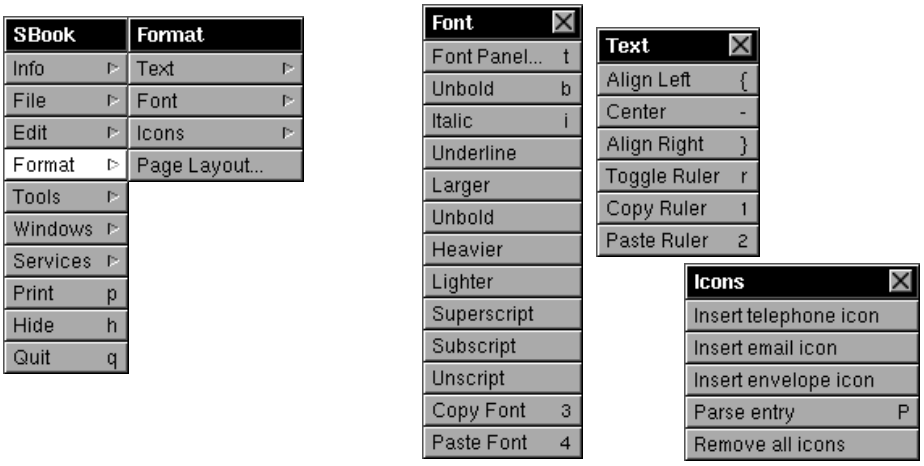
The Entry submenu



The **Entry** submenu allows editing of entries. *You should not need to use this submenu to use these commands*; all of them have keyboard equivalents, and almost all of them are accessible by using buttons or other controls directly from the SBook window.

- The **Revert entry** command (**command-U**) reverts the currently selected and displayed entry to its last saved version.
- The **New entry** command (**command-n**) creates a new entry in the currently selected file. It is identical in effect to the **New entry** button described in "Adding new entries" in Chapter1.
- The **Delete entry** command (**command-D**) deletes the currently selected entry or entries. It is identical in effect to the **Delete entry** button described in "Deleting entries" in Chapter1.
- The **Next entry** (**command-]**) and **Previous entry** (**command-[**) commands are used for sequential display of entries. They are identical in effect to the "up arrow" and "down arrow" buttons on the keyboard and on the SBook window, described in "Selecting and displaying entries" in Chapter 2.
- The **Lock entry** (**command-L**) command locks the current entry. See "Locked entries and read-only files" in Chapter 6.
- The **Print first envelope in entry** command (**command-e**) prints the first address in the entry on an envelope, just as though you had clicked on the address icon. See "Printing an envelope or mailing label" in Chapter 5.
- The **Send first email in entry** command (**command-E**) opens a Send window addressed to the first email address in the entry, just as though you had clicked on the email icon. See "Sending an email message" in Chapter 5.
- The **Dial first phone in entry** command (**command-d**) dials the first telephone number in the entry, just as though you had clicked on the phone icon. If the first telephone number is a fax number, it brings up a **Quick fax** panel. Dialing a telephone number is described in"Making a voice call" in Chapter 4; the **Quick fax** panel is described in "Sending a quick fax" in Chapter 4.

The Format menu



SBook's **Format** menu allows you to change the font and formatting of text, insert and remove icons, and change the page layout:

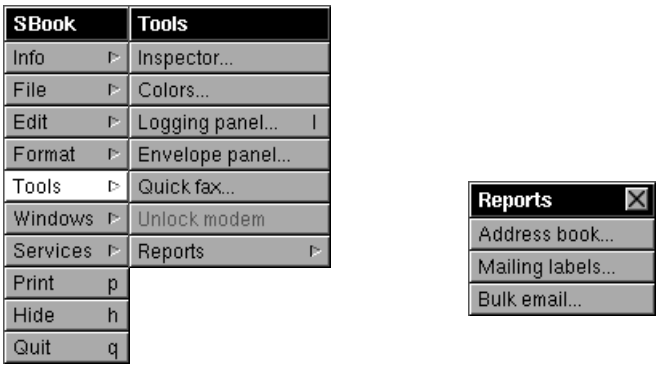
- The **Font** menu works as its counterparts do in other NeXT applications, allowing you to modify, copy, and paste fonts. Its use is described in "Font and formatting" in Chapter 3.
- The **Text** menu works as its counterparts do in other NeXT applications, allowing you to change the formatting of text, and view and change rulers. Its use is described in "Font and formatting" in Chapter 3.
- The **Icons** menu has several commands that allow you to insert and remove icons, as well as parse entries:

  The **Insert telephone icon** command, the **Insert email icon** command, and the **Insert envelope icon** command allow you to insert icons by hand (SBook usually inserts icons automatically). The use of these commands is described in "Adding icons" in Chapter 3.

  The **Parse entry** command (**command-P**) parses the selected entry. It is described in "Reparsing" in Chapter 3.

  The **Remove all icons** command (**command-R**) removes all of the icons from the selected entry. It is described in "Removing icons" in Chapter 3.

The Tools menu



SBook's **Tools** menu allows you to print reports and use several helpful tools:

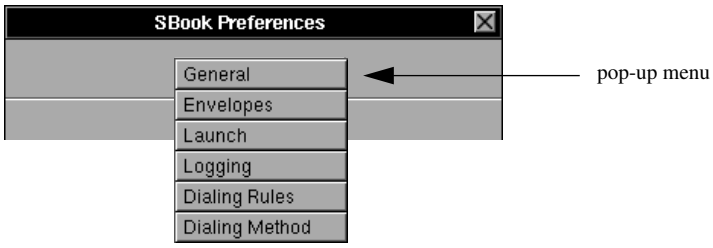
- The **Inspector...** command brings up the Inspector panel. This panel and its use is described in "SBook's Inspector Panel" in Chapter 3.
- The **Colors...** command brings up a standard Colors panel. The use of this panel is described in "The Colors panel" in Chapter 3.
- The **Logging panel...** command brings up the Logging panel. This panel is described in Chapter 7, *Logging what you do with SBook*.
- The **Envelope panel...** command brings up a blank envelope print panel so that you can fill in an address and mail an envelope. This is described in "Printing an envelope or mailing label" in Chapter 5.
- The **Quick fax...** command brings up a blank **Quick fax** panel so that you can fill in a fax number and send a one-page fax. The **Quick fax** panel is described in "Sending a quick fax" in Chapter 4.
- The **Unlock modem** command (**command-U**) unlocks the modem. This is described in "Dialing with your modem" in Chapter 4.
- The **Reports** menu allows you to make three kinds of reports: address books, mailing labels, and bulk email mailings. These three reports are described in Chapter 5, *Using Postal and Email Addresses*.

The Preferences panel

SBook's **Preferences** panel allows you to view and change SBook's six different types of preference settings.

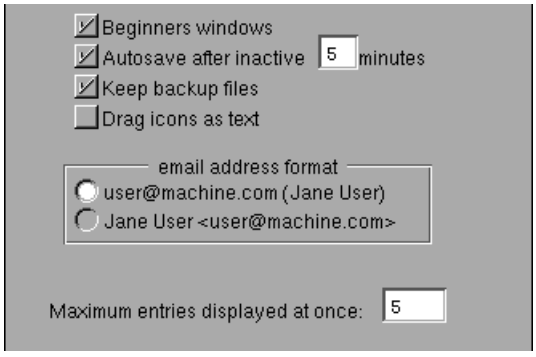
- SBook's **General** settings are covered in this section.
- SBook's settings for printing **Envelopes** are covered in Chapter 5, *Using Postal and Email Addresses*.
- SBook's settings determining which files are opened at **Launch** time are covered in Chapter 6, *Managing your SBook files*.
- SBook's settings concerning **Logging** to a file or email are covered in Chapter 7, *Logging what you do with SBook*.
- SBook's **Dialing Rules** and **Dialing Method** settings are covered in Chapter 4, *Using Telephone Numbers*.

You can bring up the **Preferences** panel at any time by choosing **Info>Preferences**. The pop-up menu at the top of the panel allows you to choose between the six different subviews corresponding to the six different types of preference settings:

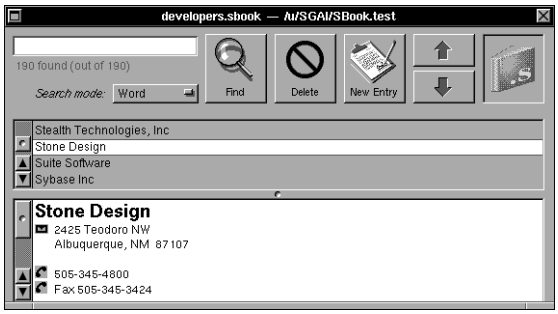


The General subview

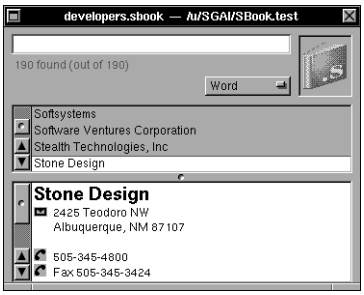
The **General** subview controls several miscellaneous settings: display of windows, autosave, automatic backups, email address format, and display of entries:



The checkbox labeled **Beginners windows** determines the complexity of the control panel section of the SBook window. You may want to uncheck this box if you prefer to use menu commands rather than using the large buttons on the control panel.



beginners windows checked



beginners windows unchecked

The checkbox labeled **Autosave after...** determines whether autosaving is turned on, and if so, how many minutes of inactivity pass before SBook autosaves. See "Reverting to the last saved version" in Chapter 6 for more information.

The checkbox labeled **Keep backup files** determines whether SBook keeps automatic backups. See "Reverting to the last saved version" in Chapter 6 for more information.

The checkbox labeled **Drag icons as text** determines what you see when you drag and drop icons. See "Copying and pasting sections of text" in Chapter 2 for more information.

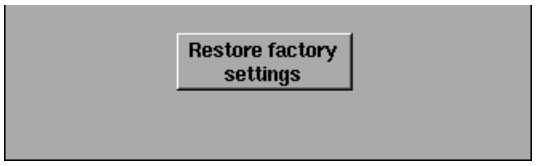
The area labeled **email address format** determines the format of all the email addresses SBook generates. Sending email is covered in "Sending an email message" in Chapter 5; bulk email is covered in "Bulk email mailings" in Chapter 5.

The field labeled **Maximum entries displayed at once** determines how many entries SBook will display (in the display window) at once. When you attempt to display more than this, SBook only displays the number of entries selected.

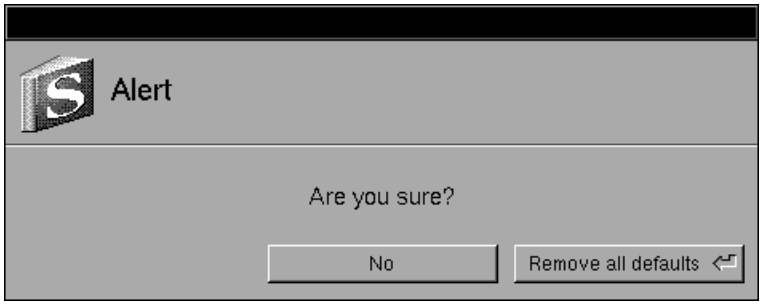
maximum entries = 1

maximum entries = 5

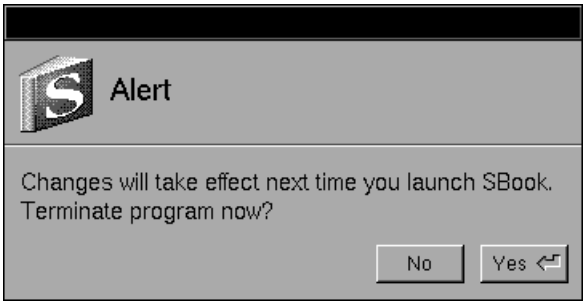
The **General** view of the **Preferences** panel also allows you to restore the factory settings of all of SBook's preferences at any time. If you want to do this, click on the large button labeled **Restore Factory Settings** near the bottom of the **Preferences** panel.



Once you click on the **Restore Factory Settings** button, SBook will display an alert panel:

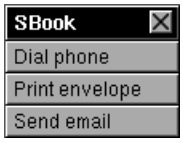


Clicking on **Remove all defaults** changes *all* of SBook's preferences back to the factory settings, so you should be really sure you want to do this. If you are sure, and you click on **Remove all defaults**, SBook will display another alert panel:



This panel informs you that the factory settings cannot be restored until you quit SBook and start it up again. If you want to start using the factory settings right away, and you have no more work to do or files to save, click on **Yes**. Otherwise, click on **No** and finish your work before leaving SBook.

Services provided by SBook



This chapter would not be complete without an explanation of the Services provided to other applications by SBook. Although this menu cannot be reached by SBook's menus or windows, it appears in the Services menu of other applications such as Mail or Edit when you have SBook installed on your system.

To use a service provided by SBook, first select a telephone number, postal address, or email address in any other application, such as Mail or Edit. Then go to the **Services** menu *in that application*, and choose **SBook** from the menu. The SBook Services menu should appear, with the following commands:

- The **Dial phone** command allows you to dial a telephone number from another application. It is described in detail in "Making a call from another application using Services" in Chapter 4.
- The **Print envelope** command allows you to print an envelope from another application. It is described in detail in "Printing envelopes from the Services panel" in Chapter 5.
- The **Send email** command allows you to send email from another application. Sending email in SBook is described in "Sending an email message" in Chapter 5.

When you choose a command from this menu, SBook will execute the command *just as though you had clicked on the corresponding type of icon* in SBook. If SBook is not already running, it will automatically launch just as though you had started it up manually.

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