

# TELEPHONE INSTRUCTIONS USER GUIDE

## Contacts Panel: Add Contact, Import/Export, Shared Contacts

You can add names to your Contacts panel by entering them individually, importing them from a .CSV file or having the system administrator upload names via the Shared Contacts function.

### Using the **Add Contact** Button

To enter a contact manually, click on “Add Contact” on the right side of the display. The Add Contact window will come up and you can enter any of the fields you have information for. Click Save when done. If you have many names, you can quickly find any contact by entering any part of the contact’s name or extension number (if they have one) in the “Enter a Name” or extension field just below the drop-down menu. Once the contact is located, you can use the “Click to Call” feature to initiate a call to any of the numbers displayed.

The screenshot shows a web interface for adding a contact. At the top right, there is a navigation bar with buttons for 'Add Contact', 'Import', and 'Export'. A red arrow points from the 'Add Contact' button to the main form. The form is titled 'Add Contact' and contains the following fields:

First Name	John
Last Name	Smith
Work number	2814532987
Mobile number	8324459877
Home number	2815567765
Fax number	4094564324
Email	john.smith@anycompany.com

At the bottom of the form are two buttons: 'Cancel' and 'Save'.

### Using the Import Function

To import several names at once, export your contacts from your contact management software (e.g. Outlook, Google, Apple vCard) to a .CSV file and click on the “Import” button. The fields that can be imported are as follows:

- First Name
- Last Name
- E-mail Address
- Primary Phone (will display as Work in the portal)

- Mobile Phone
- Home Phone
- Fax

Be sure to follow the syntax and text description for each column as shown in the illustration below. Any data field that does not match the list above will be ignored.

	A	B	C	D	E	F	G	H
1	First Name	Last Name	E-mail Address	Primary Phone	Mobile Phone	Home Phone	Fax	
2	Eric	Knaus	knausranch@gmail.com	2813382950	5624537813	2815567890	8324451225	
3								

Contacts that are manually added or imported will **only** appear in your portal and are therefore private and not visible to any other users on the voice system.

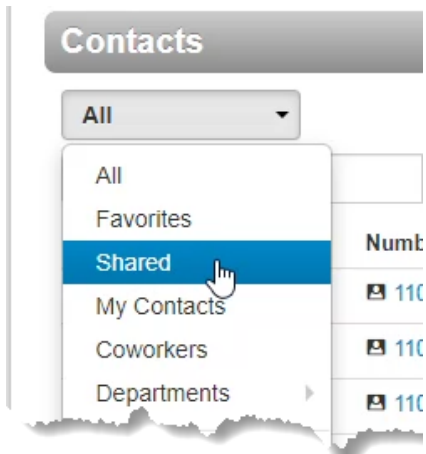
For contacts that have an extension number on the voice system, you can add information to any of the fields other than First Name, Last Name and their extension number. Like the contacts you entered manually or imported, none of the information will be shared with other users on the system.

### Using the Export Function

To export your contacts to a .CSV file, click on “Export”, choose the contacts you want to export based on the dropdown menu, select the format and click Export. The data will be exported to contacts.csv. The data can then be imported to another application that accepts .CSV files.

### Using and Entering Shared Contacts

Shared contacts are visible to all users with portal access and can be specifically sorted for in the drop-down menu. These contacts are typically vendors, service providers or customers that several co-workers frequently contact. These contacts can only be entered and modified by the system administrator. Voice system users will be able to use the “Click to Call” on any of the contacts’ numbers but will not be able to modify or use the Chat feature with them.



To enter a shared contact, from the **Manage Organization** mode in the web portal, click on "Users" and then "Shared Contacts." You can then enter the contacts in the same way they were entered in the regular Contacts panel.

**Video Tutorial:** <https://www.screencast.com>