

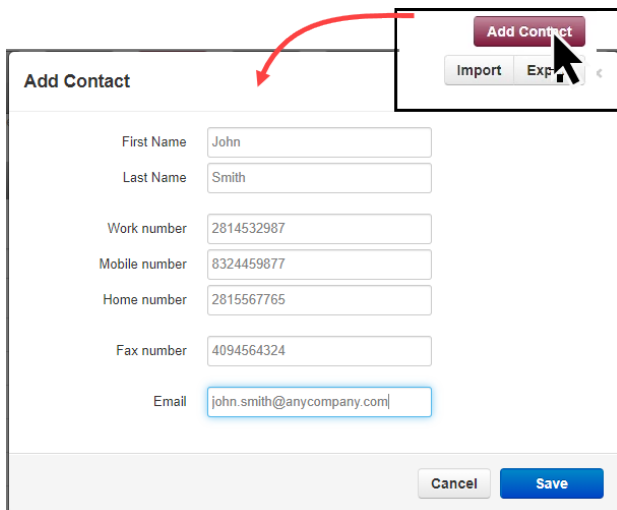
# TELEPHONE INSTRUCTIONS USER GUIDE

## Contacts Panel: Add, 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 appear and you can enter any of the fields you have information for. Click Save when done. You can quickly find a 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 dropdown 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 red button labeled "Add Contact" with a mouse cursor over it. A red arrow points from this button to the "Add Contact" form below. The form has a title "Add Contact" and contains several input fields: "First Name" (John), "Last Name" (Smith), "Work number" (2814532987), "Mobile number" (8324459877), "Home number" (2815567765), "Fax number" (4094564324), and "Email" (john.smith@anycompany.com). At the bottom of the form are "Cancel" and "Save" buttons. To the right of the form, there are buttons for "Import", "Export", and a search icon.

### Using the Import Function

To import several names at once, export 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.

	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								

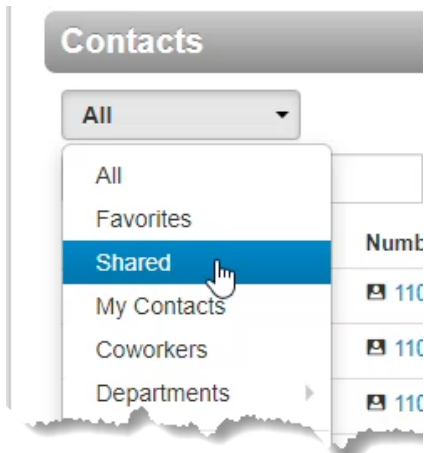
Any data field that does not match the field description will be ignored. Contacts that are manually added or imported will **only** appear in your portal and are therefore private and not visible to any other users on the voice system. For contacts that have an extension number on the voice system, 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 or customers that several co-worker frequently contact and can only be entered and modify by the system administrator. Voice system users will be able to use **“Click to Call”** on any of the contact’s numbers but will not be able to modify or use the Chat feature with them.



To enter a shared contact, you must be a system administrator. 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.

### Call History and Contacts Entries

Contacts entered as either personal or Shared are logged in your Call History any time they are used. You will see the contact’s name, number, call duration and date/time stamp when the call was concluded. In parenthesis you will also see the number type (i.e.: work, mobile, home, etc). For inbound calls, names that are entered into the “Name” field will override the Caller ID Name that was sent by the caller’s carrier. For example, if you have entered a contact as “John Anderson Smith, Jr.” for his work number but his carrier sends his Caller ID name as “John Smith”, your entry will show in Call History overriding the carrier’s text.

**Note:** If you are logged in as a System Administrator while viewing the Call History panel for the organization, you will see the **original** Caller ID name as sent by the caller’s carrier and the dialed number in the “Dialed” and “To” fields. You will not see any of the text fields that were entered from either the Shared Contacts list or anyone’s personal contact information.

From Name	From	QOS	Dialed	To	QOS	Date	Duration
Eric Knaus #2	(281) 338-2950		(281) 600-8161	802.2816479300.com		Today, 4:04 pm	0:19
Eric Knaus #2	(281) 338-2950		(888) 797-3697	(888) 797-3697		Today, 12:02 pm	10:30

Call Detail View (Green Box):  
 (888) 797-3697 Discount Low Voltage (Work) Today, 12:02 pm 10:30

Contact Card (Blue Box):  
 Discount Low Voltage (888) 797-3697  
 United Rentals (800) 877-3687

Callouts:  
 - Red: As seen from the System Administrators console  
 - Green: As seen from the user's portal  
 - Blue: As entered in the Shared Contacts field

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