TELEPHONE INSTRUCTIONS USER GUIDE
Contacts Panel Overview

The **Contacts** panel gives you a quick at-a-glance overview of the status of your co-workers as well as uploaded information for contacts that are not part of your phone system. Next to each entry will be a colored circle – or no circle – indicating their status and relationship to your company. The color definitions are as follows:

- **Green:** Their phone is online and is not in use at the time.
- **Red:** Their phone is online and in use or Do-Not-Disturb is set
- **Blue:** Available to chat in the portal – will be in conjunction with one of the other colors
- **Grey:** Their extension is either virtual (i.e. not a physical set) or offline

Shared Icon: Contact shared by all users with portal access. Can only be entered and edited by the system administrator

No Button: The name was entered manually or as part of an imported list but is not part of your phone system.

When you first access the Contacts panel, all entries will be displayed and sorted alphabetically by last name. On the right you can select **Add Contact** to add a single contact or click on either the **Import** or **Export** button to transfer contacts in bulk. Also, on the right is the **Refresh** button and **Popout** button.

By clicking on the dropdown menu on the left, you will see several ways to filter through your contact lists quickly.
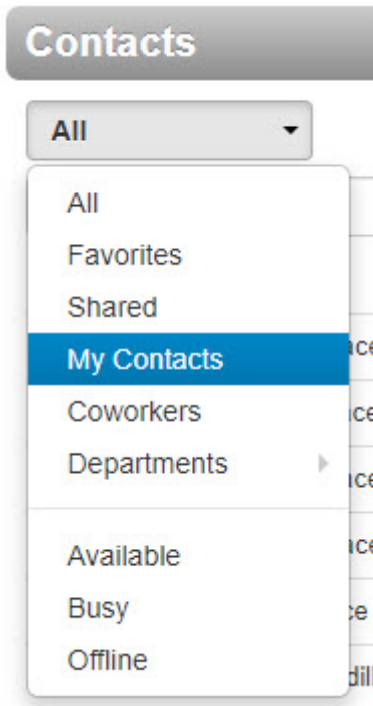
All: Displays entries.
Favorites: Displays contacts you selected as favorites, which you can add to by clicking the star next to the contact's name.

Shared: These are contacts available to the entire organization added by Office Managers.
My Contacts: Contacts you have manually added by clicking the Add Contact button or have imported as part of a list of contacts.
**Coworkers:** Displays all contacts in organization with "List in Directory" enabled.
Departments: Sorts users down by the Department entered in their user profile. Departments are created by the system administrator only.
**Available Users:** Displays contacts that are actively online and are available to be called or chatted with via the portal.
Busy Users: Users currently on the phone or have their status set to Do Not Disturb.
Offline Users: Users who do have a registered device that is offline at the moment.
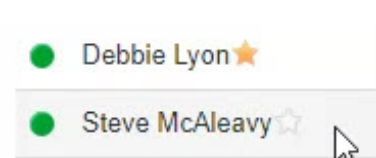
The text field below the drop-down menu allows you to further filter through your contact list. You can enter any portion of the contact's name or extension number and the system will auto-fill names or extension numbers that match your entries in the main display area below.
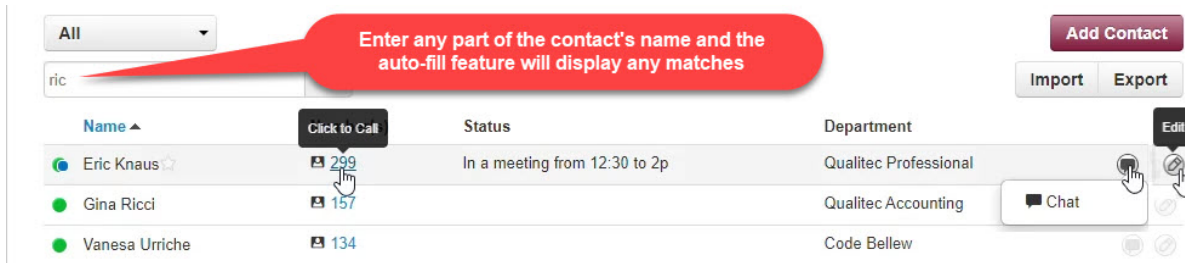
Once you select the contact you have the following options:
- Use the **Click to Call** feature on any of the number fields to initiate a call either internally or externally.
- Start a Chat session (if available)
- Edit the Contact

Note: You can edit any field for any contact that was imported or manually entered by you. For contacts that have been assigned extension numbers on the voice system, you cannot modify First Name, Last Name or their system extension number. Fields in Shared can only be entered and modified by the system administrator.

Video Tutorial: https://www.screencast.com/t/OgpjUISbeyD