

User Guide: Contacts

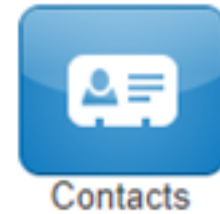
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1. Contacts

The Contacts Center icon, as seen in figure 1.a is where all users with List in Directory enabled under their profile are listed. If you do not see a user listed in the contacts, List in Directory has been disabled.

Figure 1.a



1.1 Add Contact

The Add Contact button in the right-hand corner, as seen in figure 1.1.a, will open the New Contact window, as seen in 1.1.a, and allow you to enter a new contact that will be displayed in your account's contacts.



Figure 1.1.a

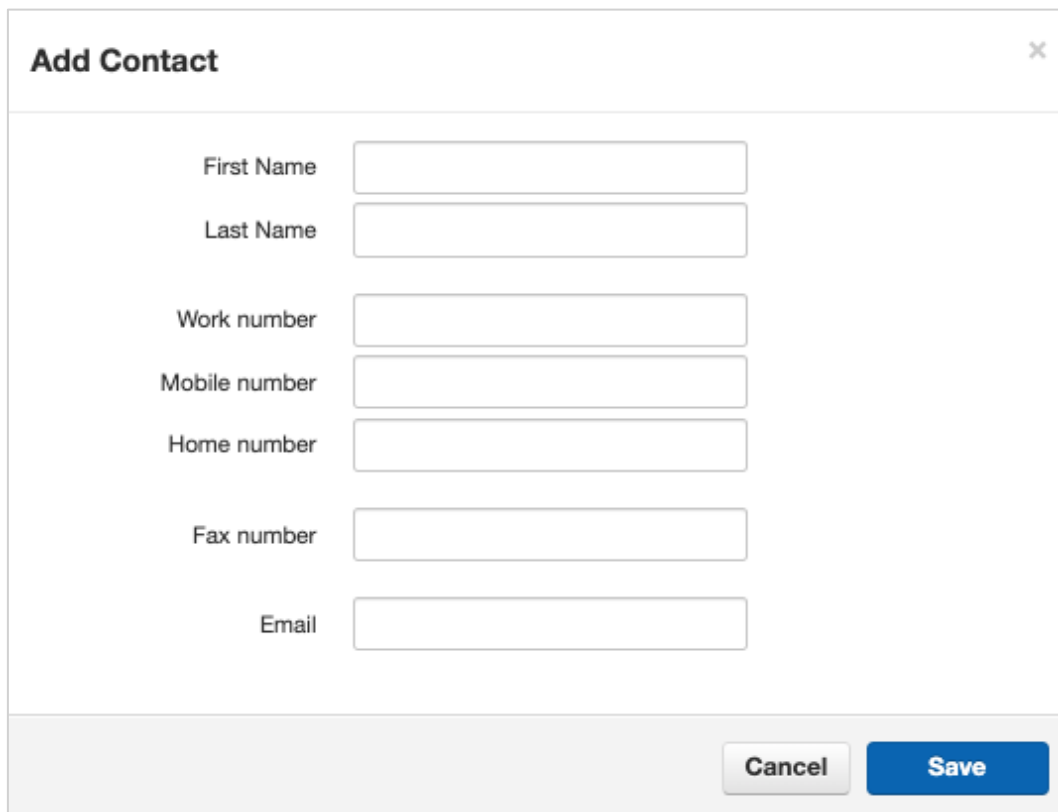
A window titled "Add Contact" with a close button (X) in the top right corner. The form contains several input fields: "First Name", "Last Name", "Work number", "Mobile number", "Home number", "Fax number", and "Email". Each label is to the left of its corresponding input field. At the bottom right of the form are two buttons: "Cancel" (light gray) and "Save" (blue).

Figure 1.1.b

1.2 Import

The import option allows you to import contacts from a CSV file (Outlook, Google, and Apple vCard) that will bulk create users in your contacts.

1.3 Export

The Export button will allow you to create a CSV file for the contacts group selected in the Contacts to Export drop down. The Export format will export the CSV file into an Outlook, Google, or Apple vCard CSV file format.

1.4 Groups

On the Contacts page, you will see a drop down as seen in figure 1.4.a that will let you filter for desired groups.

When numbers are blocked by your domain, adding the number to the Allow list will let you bypass the domain block and still receive calls from that number / user.

1.4.1 All Users

Displays all users on the system with List in Directory enabled.

1.4.2 Your Favorites

Displays contacts you selected as favorites. You can add a contact to favorites by clicking the star next to the contacts name as seen in figure 1.4.2.a.

1.4.3 Shared

Shared Contacts are contacts that are available to the entire organization. These contacts are added by Office Managers.

1.4.4 My Contacts

Contacts you have manually added by clicking the Add Contact button in the top right.

1.4.5 Coworkers

Displays all contacts in organization with List in Directory enabled.

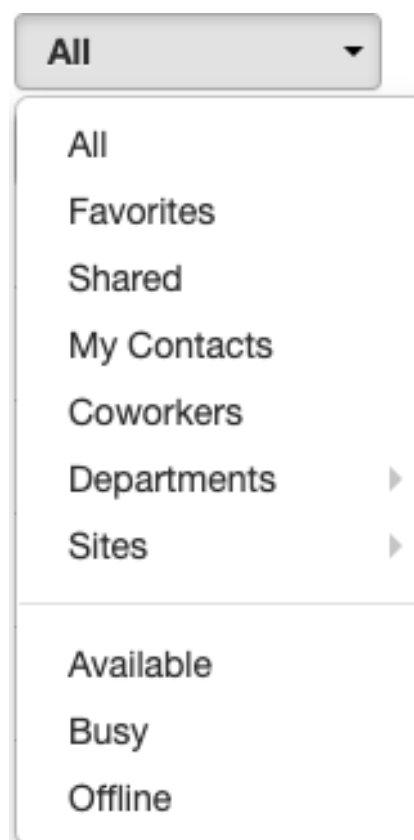


Figure 1.4.a

1.4.6 Departments

This filter breaks users down by the Department entered on their user profile.

1.4.7 Sites

This filter splits users up by the Site their user profile is assigned to.

1.4.8 Available Users

Displays contacts that are available to be called or chat via the portal.

1.4.9 Busy Users

Are users currently on the phone or have their status set to Do Not Disturb.

1.4.10 Offline Users

Users who do not have a registered device or are not logged into the portal and available to chat.

When selecting a contacts group option, the contacts for that group will appear as seen in figure 1.4.9.a. You can sort them by Name.













Name ^	Number(s)	Status	Department	Site
 Demo Admin	 206			 
 Demo Agent 1	 204	In a meeting	Support	 
 Demo Agent 2	 205		Support	 

Figure 1.4.9.a

1.5 Contacts Status Icon

Green

Contacts displayed with a green dot are available.

Blue

Contacts displayed with a smaller blue dot in front of the green dot means that person is available to chat in the portal.

Red

If the contact has a red dot, that means the user is currently busy.

To begin a chat with a user, click the Chat icon to the right as seen in figure 1.5.a. Next to the Chat icon you will see the Edit Contact icon.



Figure 1.5.a

1.6 Chat with Contact

Clicking the Chat icon seen in figure 8.5.a will open a chat window with that user.

1.7 Edit

The Edit icon to the right of the contact will open the Edit Contact window where you can configure* the contact with a different:

- First Name
- Last Name
- Work Number
- Mobile Number
- Home Number
- Fax Number
- Email Address

***The extension number cannot be changed.**