


Contacts

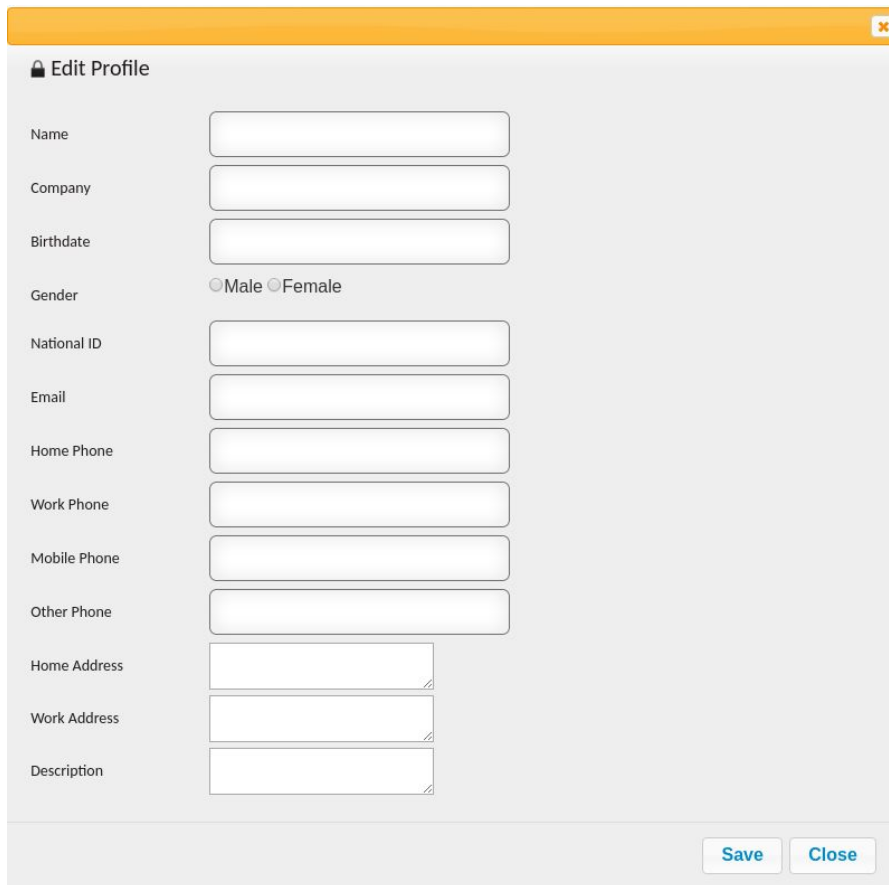


For quick and easy transfers using the contact list from the agent screen, Administrators can add, change, and modify contacts within the contacts screen.

Adding a Contact

*Note: The “Name” & “Email” input boxes are mandatory fields (See **Contact Quick Add Section** to quickly add a contact if you need more information regarding adding phone numbers, and other contact information, use the following steps).*

1. Click the New button, , located in the top right corner of the contact screen; the following pop-up screen will appear below:



The screenshot shows a pop-up window titled "Edit Profile" with a close button in the top right corner. The form contains the following fields:

- Name: Text input field
- Company: Text input field
- Birthdate: Text input field
- Gender: Radio buttons for Male and Female
- National ID: Text input field
- Email: Text input field
- Home Phone: Text input field
- Work Phone: Text input field
- Mobile Phone: Text input field
- Other Phone: Text input field
- Home Address: Text input field with a small icon in the bottom right corner
- Work Address: Text input field with a small icon in the bottom right corner
- Description: Text input field with a small icon in the bottom right corner

At the bottom right of the form are two buttons: "Save" and "Close".

2. Starting from the top, in the “Name” input box, type the new contact’s first and last name as seen below:

Note: The “Name” & “Email” input boxes are mandatory fields (See Contact Quick Add Section



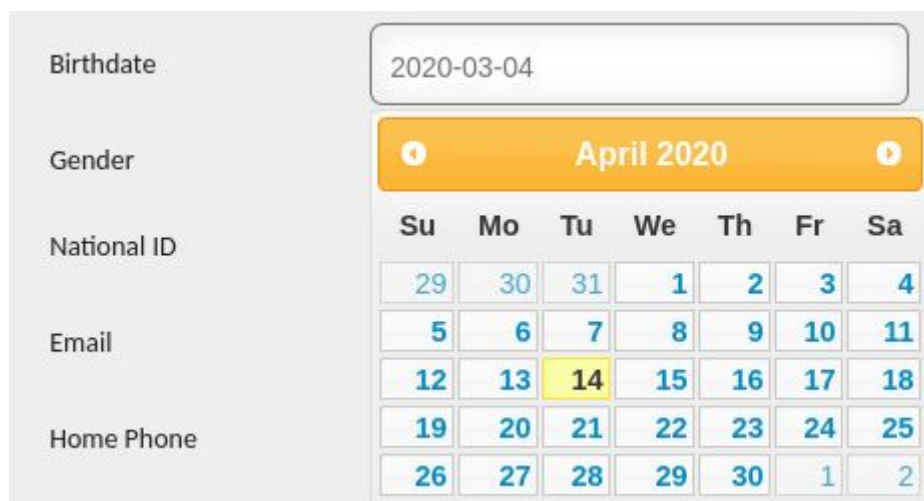
A screenshot of a form field labeled "Name" with the text "John Smith" entered inside the input box.

3. In the “Company” input box, type the contact’s company’s name, as demonstrated below:



A screenshot of a form field labeled "Company" with the text "John's Call Center" entered inside the input box.

4. Click the birthdate input box; dates have to be entered using the following format: YYYY-DD-MM. A calendar will also appear to assist in selecting the contact’s accurate birthdate, as shown below:



A screenshot of a form field labeled "Birthdate" with the text "2020-03-04" entered. Below the input box is a calendar for April 2020. The date "14" is highlighted in yellow.

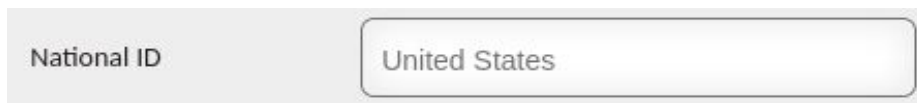
April 2020						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

5. Select a gender; two selections can be made, as shown below:

A form with a label 'Gender' and two radio button options: 'Male' and 'Female'.

Gender Male Female

6. In the “National ID” input box, the contact’s nationality can be typed in as demonstrated below:

A form with a label 'National ID' and a text input box containing 'United States'.

National ID

7. In the “Email” input box, type the contact’s email address as shown below:

A form with a label 'Email' and a text input box containing 'johnsmith@johnscalcenter.com'.

Email

8. In the “Home Phone” input box, type the contact’s home phone number:

A form with a label 'Home Phone' and a text input box containing '+18000000000'.

Home Phone

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

9. In the “Work Phone” input box, type the contact’s work phone number:

A form with a label 'Work Phone' and a text input box containing '+18000000000'.

Work Phone

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

10. In the “Mobile Phone” input box, type the contact’s mobile phone number:

Mobile Phone	+18000000000
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Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

11. In the “Other Phone” input box, type the contact’s other phone number:

Other Phone	+18000000000
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Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

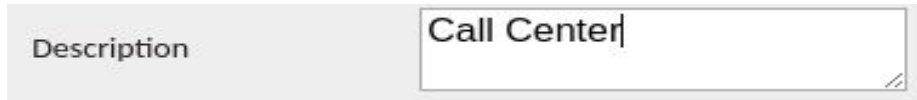
12. In the “Home Address” input box, type the contact’s home address, an example is shown below:

Home Address	101 John's Way, Anywhere, USA, 10000
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13. In the “Work Address” input box, type the contact’s work address, an example is shown below:

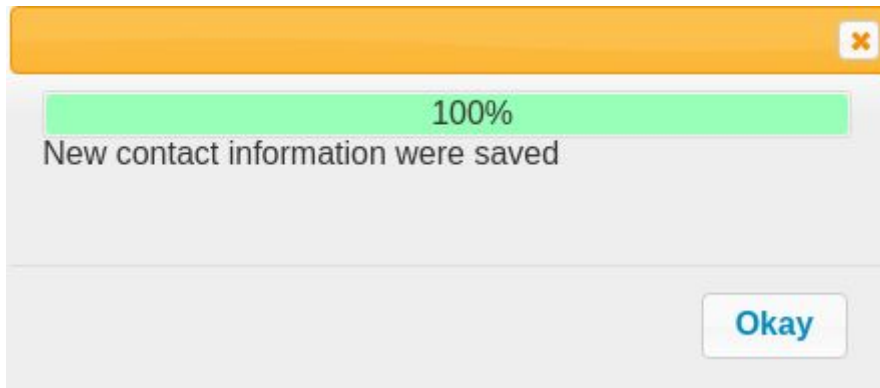
Work Address	101 John's Way, Anywhere, USA, 10000
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14. In the “Description” input box, type a description, an example is shown below:



A screenshot of a form with a label 'Description' and an input box containing the text 'Call Center'.

15. After all the desired additions have been made, click the save button, , the following pop-up window will appear:




16. Click the Okay button, , to acknowledge the addition; the new contact will be located in the contact list as seen below:

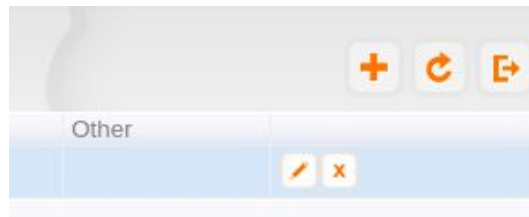


Name	Company
johnsmith@johnscallcenter.com	John's Call Center

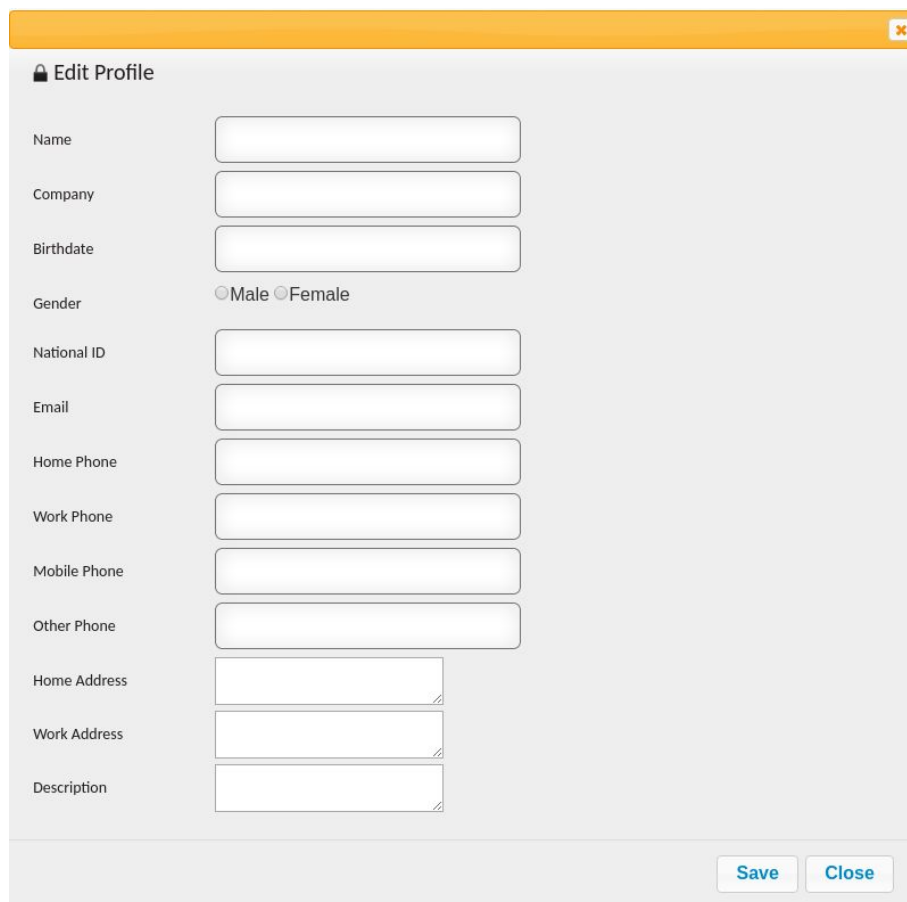
The screenshot shows a table with two columns: 'Name' and 'Company'. The first row contains the email 'johnsmith@johnscallcenter.com' and the company name 'John's Call Center'. There are also navigation arrows at the bottom left of the table.

Editing a Contact

1. To edit a contact, click the edit button, , located on the far right of the Contact Name after the “Other Column” as shown below:




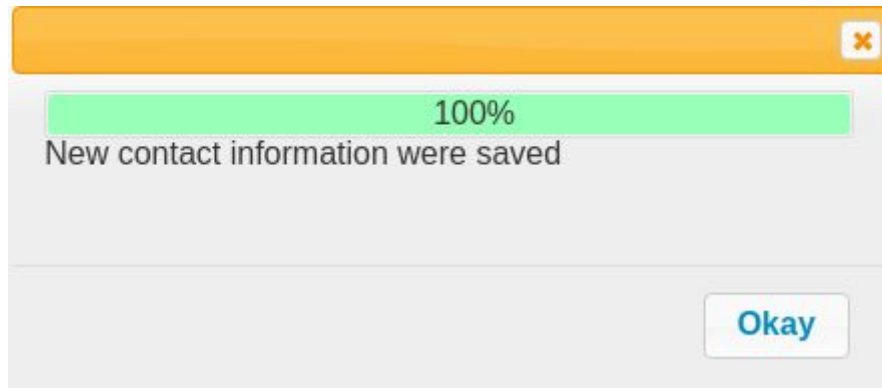
After clicking the edit button, the contact pop-up window will appear as shown:


A screenshot of a pop-up window titled "Edit Profile" with a close button (x) in the top right corner. The window contains a list of fields for editing contact information: Name, Company, Birthdate, Gender (with radio buttons for Male and Female), National ID, Email, Home Phone, Work Phone, Mobile Phone, Other Phone, Home Address, Work Address, and Description. Each field is represented by a text input box. At the bottom right of the window, there are two buttons: "Save" and "Close".

All edits can be made using this pop-up window, such as adding and changing contact information.


2. Make changes as desired.
3. Once the desired changes have been completed, the information can be saved by

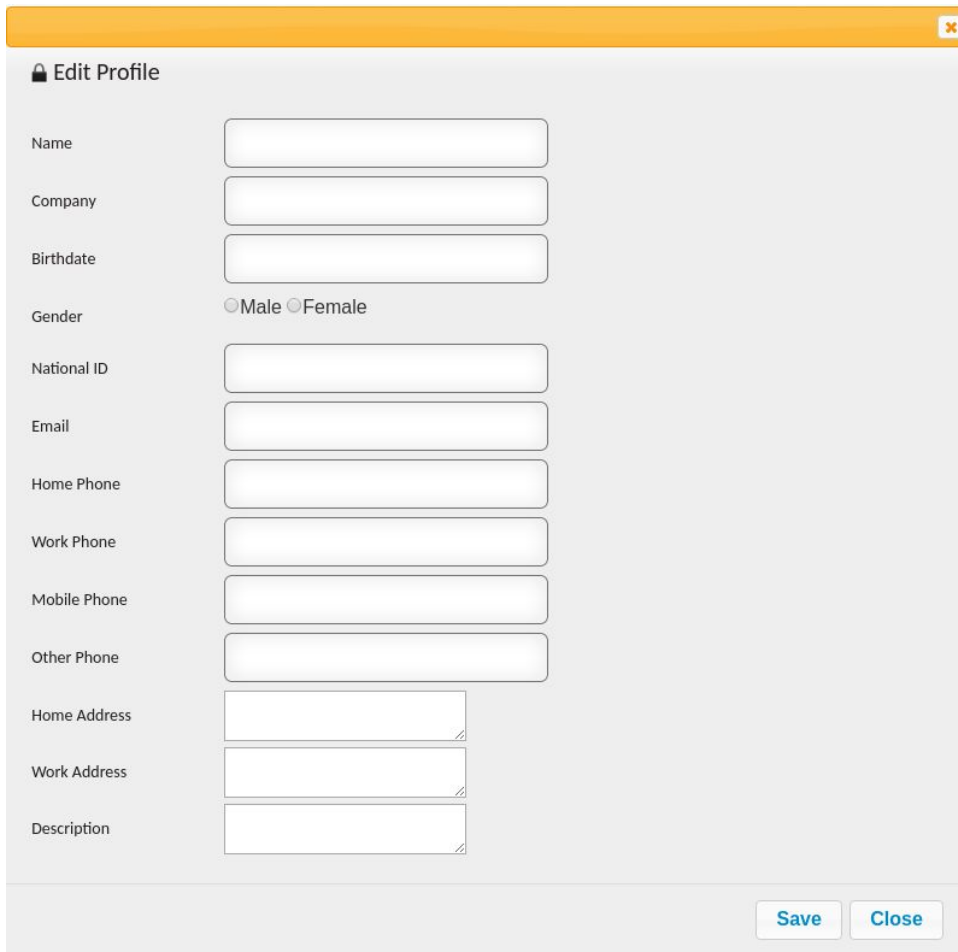
clicking the save button, , the following pop-up box will appear:



4. Click the Okay button, , to confirm the changes.

Contact Quick Add

1. Click the New button, , located in the top right corner of the contact screen; the following pop-up screen will appear as shown below:



The screenshot shows a pop-up window titled "Edit Profile" with a close button in the top right corner. The form contains the following fields:

- Name
- Company
- Birthdate
- Gender: Male Female
- National ID
- Email
- Home Phone
- Work Phone
- Mobile Phone
- Other Phone
- Home Address
- Work Address
- Description

At the bottom right of the form are two buttons: "Save" and "Close".

2. In the "Name" input box, type the new contact's first and last name as seen below:




A close-up of the "Name" input field. The label "Name" is on the left, and the input box contains the text "John Smith".

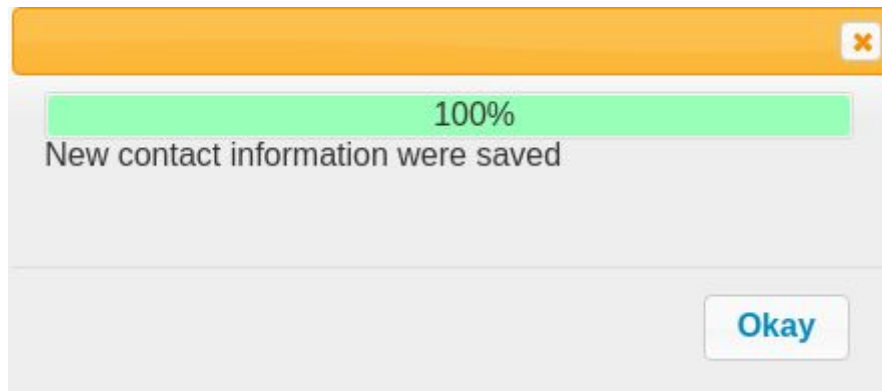
3. In the “Email” input box, type the contact’s email address as shown below:



A screenshot of a web form showing an input field labeled "Email" with the text "johnsmith@johnscalcenter.com" entered inside it.

“Name” and “Email” are mandatory fields; other information can be inputted if desired.

4. Add additional contact information as desired (Refer to the **Adding a Contact** section)
5. After all the desired additions have been made, click the “Save” button,  , the following pop-up window will appear:

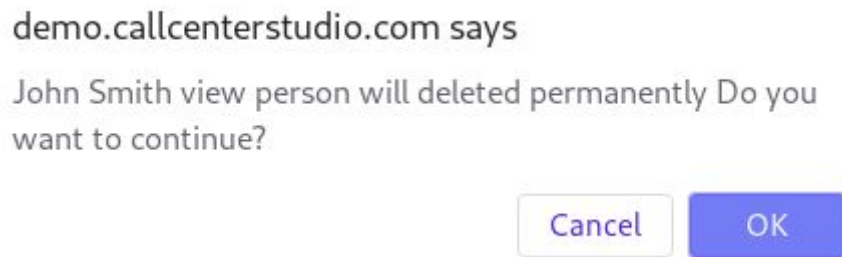



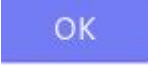
6. Click the “Okay” button,  , to confirm the changes.

Deleting a Contact

1. From the Contact Name list, click the delete button,  , to the right of the edit button,

 . When the delete button is clicked, the following pop-up will appear:



- Selecting the cancel button,  , will cancel the deletion.
- Selecting the OK button,  , will confirm the deletion.

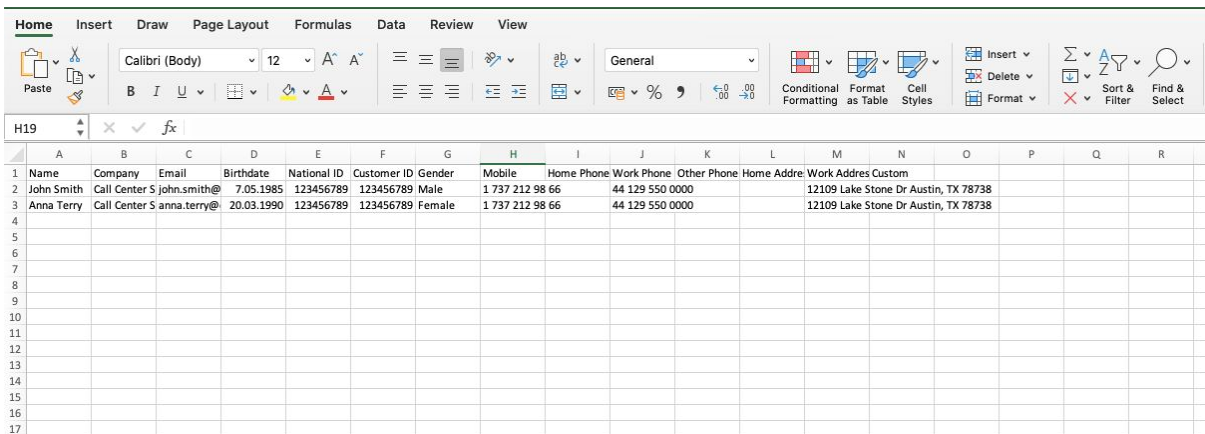
2. Confirm the deletion by clicking the OK button,  .

The screen will reload, and the deleted team will not be shown.

Importing a Contact List

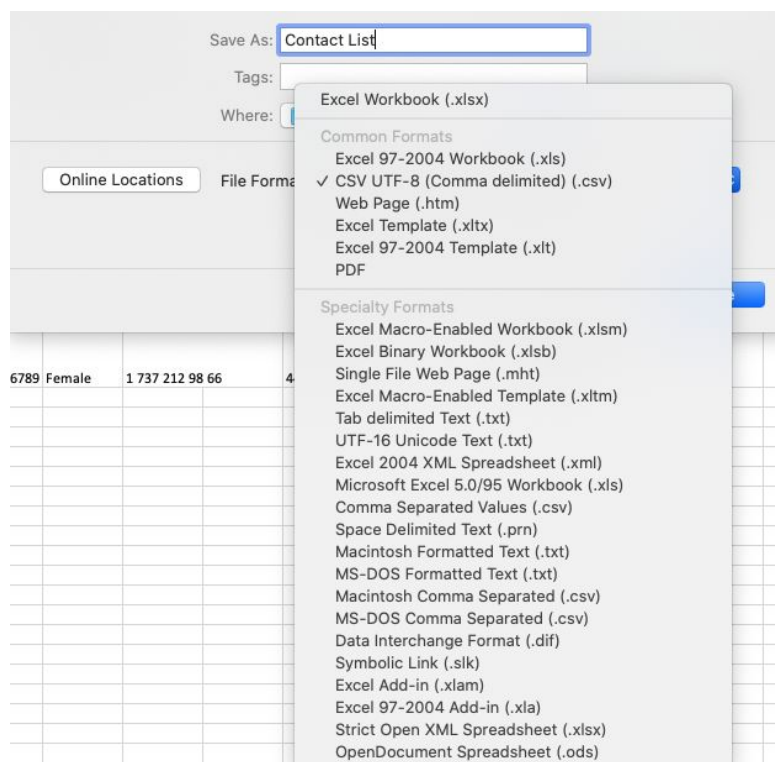
A contact list can be imported to facilitate the quick addition of large quantities of contacts.


1. Write your Contact List in an excel sheet, as shown below.

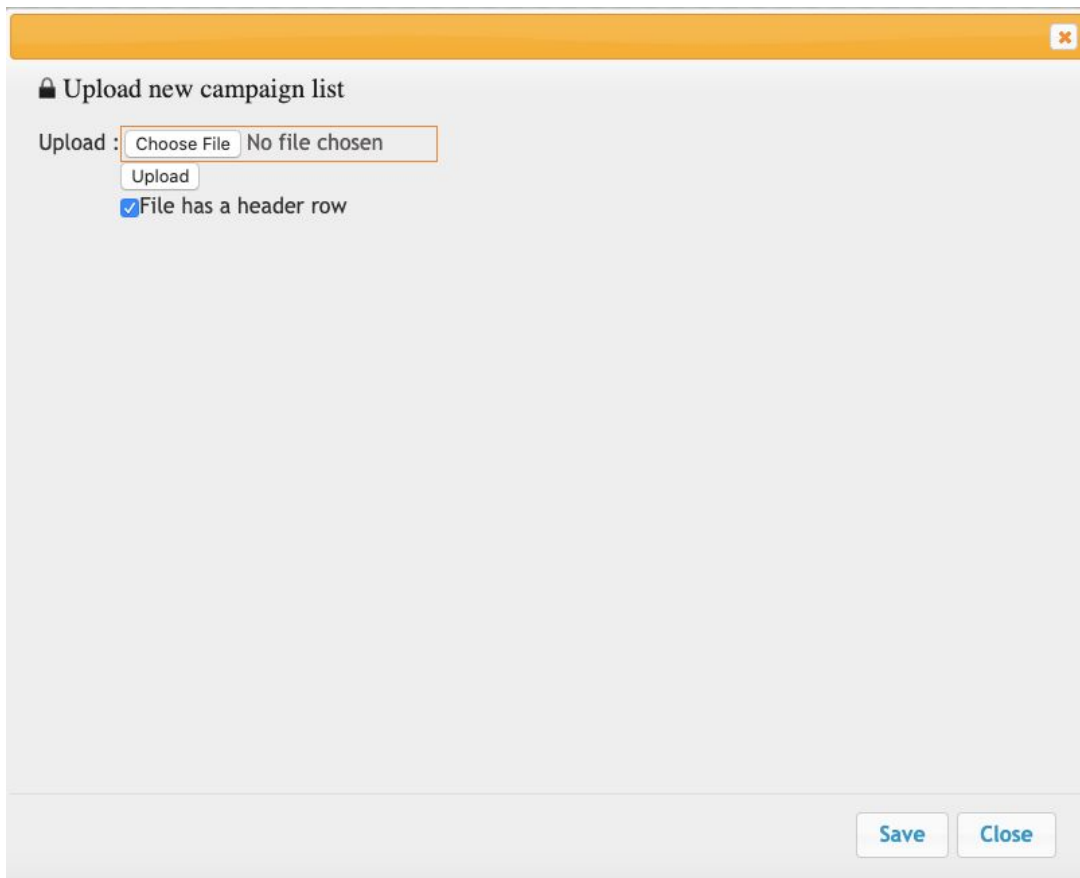


1	Name	Company	Email	Birthdate	National ID	Customer ID	Gender	Mobile	Home Phone	Work Phone	Other Phone	Home Address	Work Address	Custom
2	John Smith	Call Center S	john.smith@	7.05.1985	123456789	123456789	Male	1 737 212 98 66		44 129 550 0000		12109 Lake Stone Dr Austin, TX 78738		
3	Anna Terry	Call Center S	anna.terry@	20.03.1990	123456789	123456789	Female	1 737 212 98 66		44 129 550 0000		12109 Lake Stone Dr Austin, TX 78738		
4														
5														
6														
7														
8														
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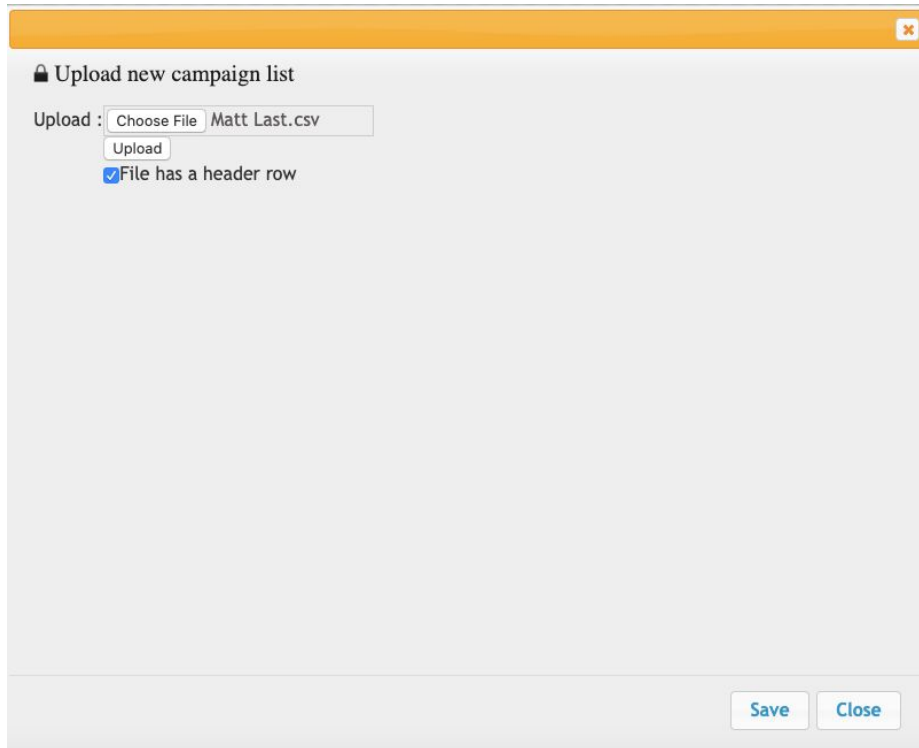
2. Go to “File> Save as” and save it in a CSV UTF-8 Format, as shown below.



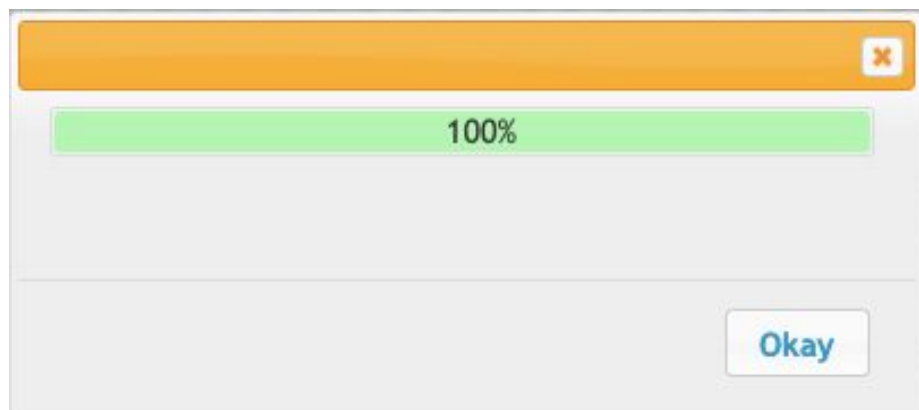
3. Click the import button, , located in the top right corner of the contact screen; the following pop-up screen will appear as shown below:

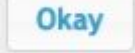


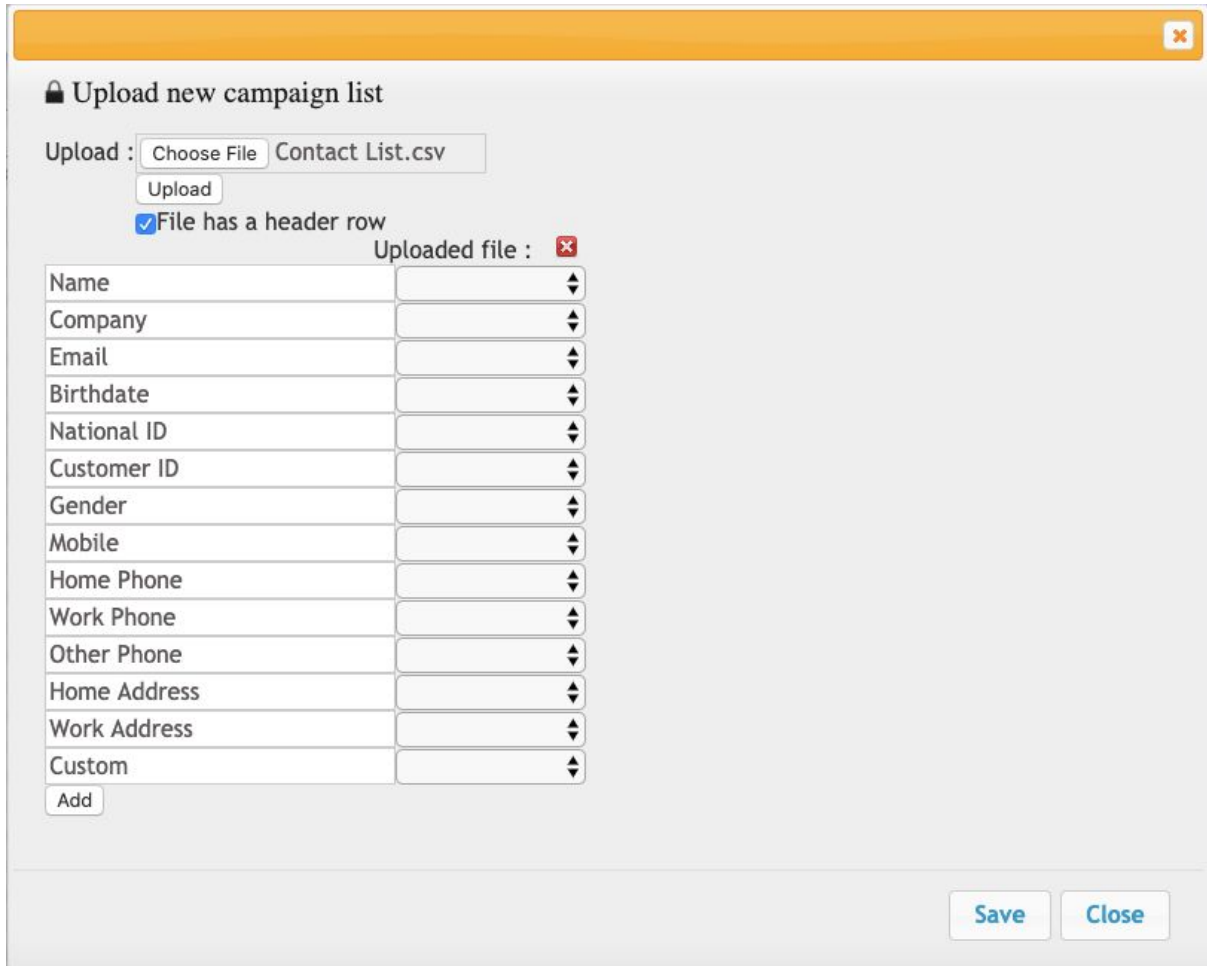
4. Click the “Choose file” button and choose the saved file described above in a CSV UTF-8 format.



5. Click the upload button; then the following pop-up screen will appear as shown below:



6. Click the Okay button,  , to confirm the upload. Once the uploading process is done, the following screen will be seen as shown below.



Upload new campaign list

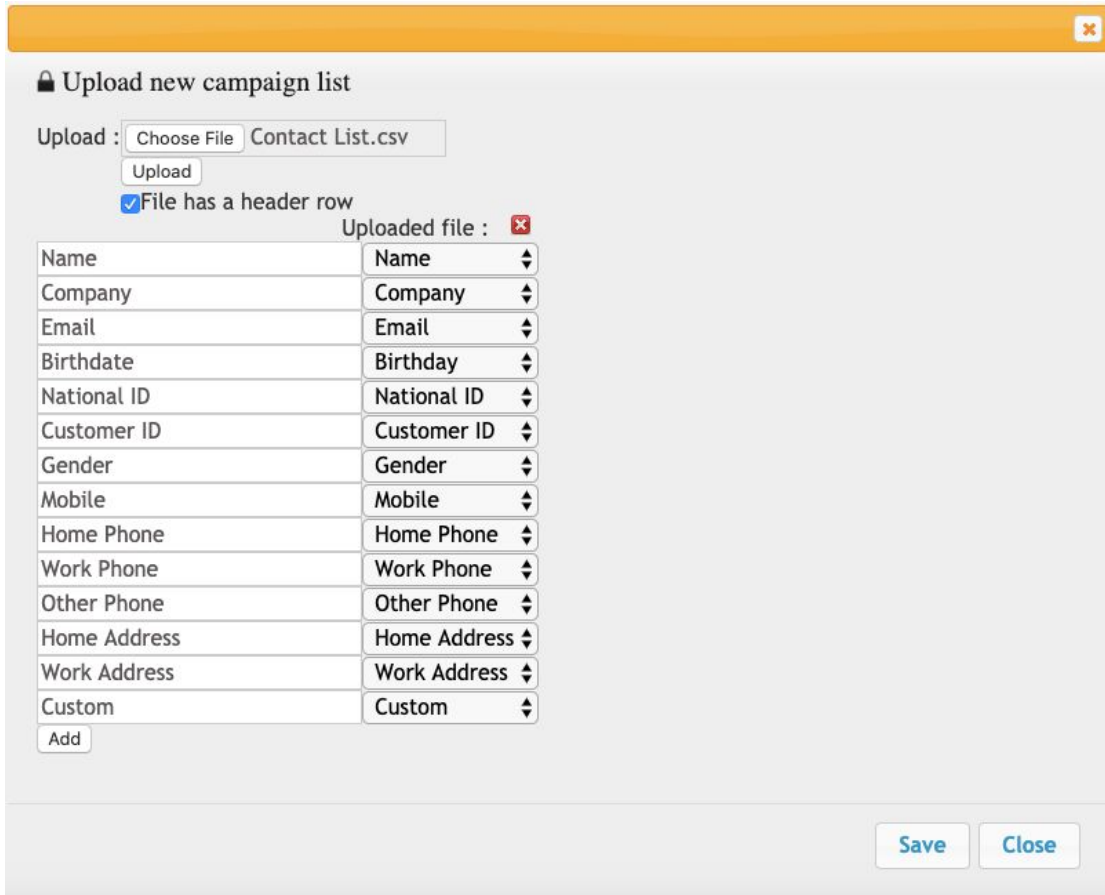
Upload :

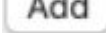
File has a header row

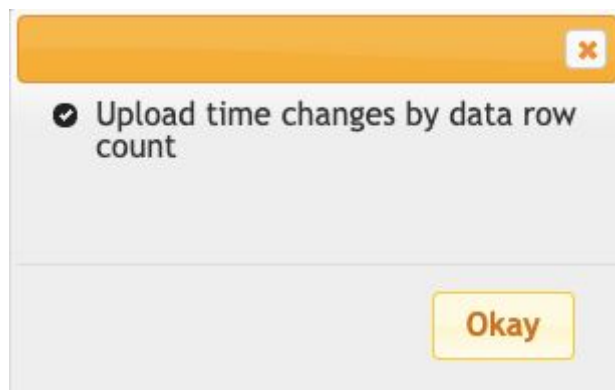
Uploaded file :


Name	<input type="text"/>
Company	<input type="text"/>
Email	<input type="text"/>
Birthdate	<input type="text"/>
National ID	<input type="text"/>
Customer ID	<input type="text"/>
Gender	<input type="text"/>
Mobile	<input type="text"/>
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
Other Phone	<input type="text"/>
Home Address	<input type="text"/>
Work Address	<input type="text"/>
Custom	<input type="text"/>

7. Choose the matched column names from the dropdown lists, as shown below.




8. Once the desired selection is made, click the add button, , the following pop-up window will appear as shown below:



9. Click the Okay button, , to confirm uploading. Then click the save button,



10. Click the Close button, .

11. Click the refresh button, , to see added contact list.

Searching for a Contact

There are two ways to search for a Contact, as explained below:

Name

1. Click the “Name” input box, type the contact’s name as shown below:

A screenshot of a search interface. On the left, there is a grey rectangular button with the word "Name" in a light grey font. To the right of this button is a white input box with a thin grey border. Inside the input box, the text "John Smith" is entered, followed by a vertical cursor line.

Note: Partial names can be used, when spelled correctly.

Company

1. Click the “Company” input box, type the contact’s company name as shown below:

A screenshot of a search interface. On the left, there is a grey rectangular button with the word "Company" in a light grey font. To the right of this button is a white input box with a thin grey border. Inside the input box, the text "John's Call Center" is entered, followed by a vertical cursor line.

Note: Partial company names can be used, when spelled correctly.