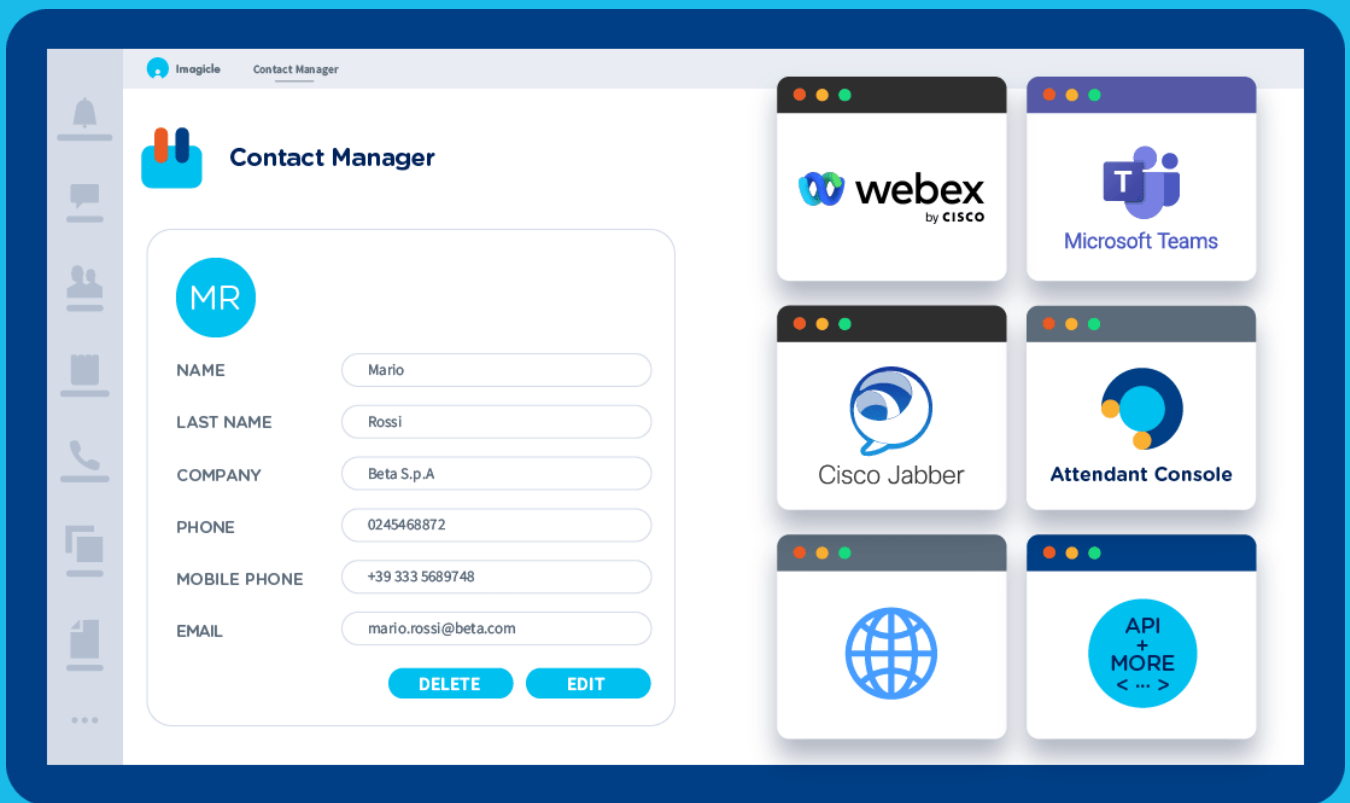


Contact Manager

User Guide

Included in the Imagicle UCX Suite

Rel. Spring 2024





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Content

CONTACT MANAGER	1
USER GUIDE	1
1 INTRODUCTION	4
1.1 PURPOSE OF THIS DOCUMENT.....	4
1.2 IMAGICLE UCX SUITE OVERVIEW.....	4
2 CONTACT MANAGER – USER WEB INTERFACE	5
2.1 CONTACT MANAGER SEARCH PAGE	6
2.2 CONTACT MANAGER MANAGEMENT	7
3 CONTACT MANAGER – CISCO IP PHONE INTERFACE	9
3.1 SEARCH & BROWSE DIRECTORIES AND CONTACTS ON YOUR PHONE	10
3.1.1 Favorites Directory.....	12
3.2 CALLER ID	13
4 CONTACT MANAGER – ATTENDANT CONSOLE	14
5 GADGET FOR CISCO JABBER AND WEBEX CLIENTS	16
5.1 CLIP AND DIAL.....	17
6 GADGET FOR CISCO FINESSE WEB CLIENT	18
7 APPLICATION FOR MICROSOFT TEAMS PC CLIENT	20



1 Introduction

1.1 Purpose of this document

This guide has been created to allow Imagicle Contact Manager users to access to company directories, browse contacts and make calls from different users' interfaces.

Imagicle Contact Manager allows users to create directories with contacts, manually or by importing from files or from external sources and provides access to its directories through:

- Web interface
- Selected Cisco IP Phones
- Jabber for Desktop
- Microsoft Teams client
- Attendant Console client (not treated in this guide)

The access is fully managed by an intuitive and easy to use interface, available in six different languages: English, German, French, Spanish, Arabic and Italian.

1.2 Imagicle UCX Suite overview

Contact Manager is included in the UCX Suite, which provides a set of best in class applications empowering and simplifying existing collaboration offering.

The Imagicle UCX Suite addresses the needs of organizations from any vertical, providing an awesome experience to all users, from their Jabber desktop and mobile clients, their IP Phones and browsers.

All the applications can be accessed through an easy to use Web Interface: Digital Fax, Call Analytics, Contact Manager Services-CallerID-ClickToCall, Attendant Console-CTI-Advanced Queueing, Auto Attendant, Call Recording and more.

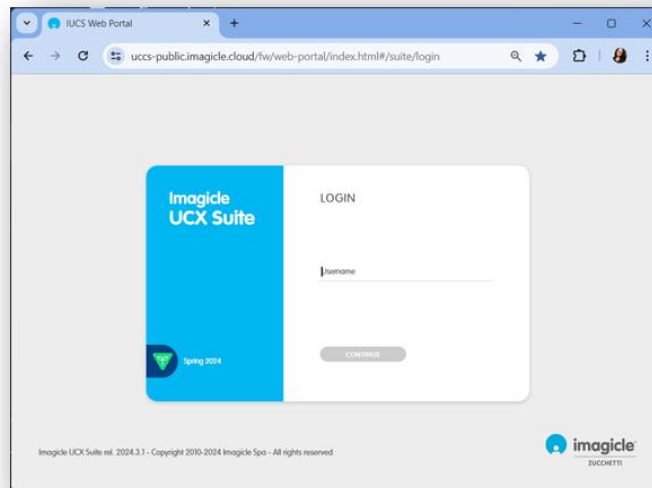
The web interface provides a single integrated environment to get access to all functionalities by logging in once.

In an international multi-site environment, each user has a localized access to Imagicle server with own language.



2 Contact Manager – User Web Interface

Contact Manager provides its own web portal, that you can access with your own credentials. Just open a supported web browser, like Edge, Chrome or Safari, and enter the name or IP address of Imagicle server. This will bring the Imagicle Suite login page:

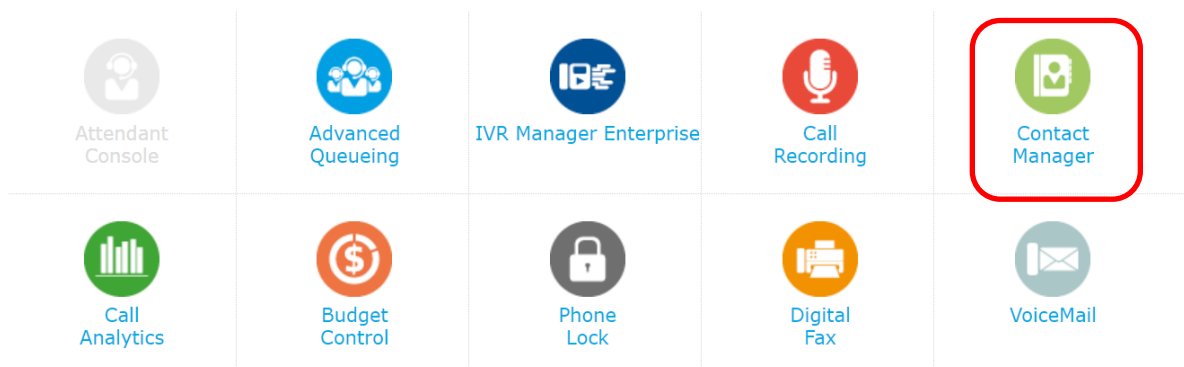


Normally, users' credentials are the same as Windows PC logon (Active Directory). Pls. contact your IT administrator for further details.

Once logged in, Imagicle Suite's main menu is displayed, showing all application available to users. Pls. click on "Directory & Caller ID" icon to access to Contact Manager pages.

IMPORTANT Based on your privilege, you can have a read-only access to a limited set of directories (simple user) or you can edit department and personal directories (superuser) or you can have full control of all directories (administrator).

Welcome John Smith



2.1 Contact Manager Search page

First Contact Manager web page that appears is named “**Search Contacts**”. This page allows you, depending on your permission level, to perform a contact search on all Public directories, plus selected Department and Personal directories:

- **Simple search** provides a single search field and it acts as a Google-like search on all directory’s fields, including name, surname, phone numbers, etc.
- **Advanced Search** allows you to perform a search based on specific fields: last and fist name, email, phone number, department
- For both above search criteria, it is also possible to configure specific “Options” to limit search to internal or external contacts, change search mode (begin with, contains, equal to) and limit number of search results to a desired number of contacts
- Returned search results are including entries with any diacritic marks associated to same letter. As an example, if you search for “Muller”, search results include Müller, too.

Below you can see an Contact Manager Search sample.

Contact Manager Search Contacts Manage Directories

[Options \(Hide\)](#) | [Simple](#)

WHO ARE YOU LOOKING FOR?

Last name

First name

Email

Primary Ext number

Department




OPTIONS SEARCH

Search in

Search Mode

Maximum Results

Contact found: 1 of 1

NAME	PHONE NUMBER
 Amadini Filippo <small>dev Imagicle</small>	Business phone  0225063725 Mobile business  333383725

By clicking on any internal/PSTN **blue** phone number’s link available in search results, you can actually trigger an outgoing phone call to that number, using phone device currently associated to your user’s profile. Pls. keep in mind that phone device’s IP address must be reachable from your PC.




If your CUCM profile includes multiple phone devices, you must ask your administrator to configure into Imagicle user’s profile the specific MAC address of the device from where you want to initiate outgoing calls.

Contact Manager [Search Contacts](#) [Manage Directories](#)












2.2 Contact Manager Management

Next Contact Manager web menu item is “[Manage Directories](#)”. This web page shows the list of all available directories you have granted the access. This list includes three different types of directories:

1.  **Public Directory:** it includes contacts which are accessible to every Contact Manager enabled user. You can search and browse this directory, but you cannot change it, unless you are an administrator.
2.  **Department Directory:** it includes contacts which are accessible to Contact Manager enabled user associated to a specific department. You can search, browse and modify it by adding changing and removing contacts.
3.  **Personal Directory:** This is a directory that has been created by you, therefore you can search, browse and modify it by adding changing and removing contacts.

A “lock” besides directory type means that relevant directory is blocked for any type of user. A yellow star besides directory type means that this is a “VIP” directory and its contacts will get priority when they call a service managed by Imagicle Queue Manager application.

Contact Manager [Search Contacts](#) [Manage Directories](#)

+ Create New Directory Delete Selected Directories							
<input type="checkbox"/>	TYPE	VIP	EDITABLE	SYNCHRONIZED	NAME	DEPARTMENT	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Local Contacts (94)		
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Corporate Mobile SmartNumbers (20)		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sales (0)		
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	International Customers (7)		
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pubblica_magenta (0)		
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEMO-VIP (1)		
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	My Personal Contacts (1)		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Suppliers (20)	Sales	
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Resellers (17170)	Sales	

By clicking on “Create New Directory”, you can add a new Personal Directory and fill it with manually entered contacts or with contacts imported from an Excel/CSV file.

See below a sample of manually adding/editing a contact, with all available fields:



Edit Contact - Public Contact

First Name	<input type="text" value="Steve"/>		
Last Name	<input type="text" value="Miller"/>		
Company Name	<input type="text" value="Steve Miller Band"/>		
Email	<input type="text" value="steve.miller@company.com"/>		
Postal Address	<input type="text"/>		
Fax	<input type="text" value="0459966554"/>	Speed Dial	<input type="text" value="2568"/>
Home Phone	<input type="text" value="0459955443"/>	Speed Dial	<input type="text" value="2569"/>
Business Phone	<input type="text" value="08833554477"/>	Speed Dial	<input type="text" value="2567"/>
Mobile Business	<input type="text" value="0998225587"/>	Speed Dial	<input type="text" value="2566"/>
Mobile Private	<input type="text"/>	Speed Dial	<input type="text"/>
Salesforce ID	<input type="text"/>		

Pls. note that, for each phone number, you can also configure a "Speed Dial" short number, a very powerful feature for a quicker and easier to remember call to frequent phone numbers.

Please ask your system administrator the numbering range you can use for assigning Speed Dials. You can also add contacts using CSV import. You can download an empty template from Contact Manager web interface and fill it with contacts data, starting from second line (first line includes fields header). Pls. remember to save CSV file with "UTF-8" format.

Contact Manager Search Contacts [Manage Directories](#)

Import contacts from csv file

Download template [Template.csv](#)

Select file Nessun file selezionato

When working with Excel, save using the "Unicode Text" file type to preserve international characters. This will create a TSV text file that can be imported in the same way as CSV.

3 Contact Manager – Cisco IP Phone Interface

Contact Manager provides its phone directories access from most Cisco IP phones equipped with an LCD display, like 69XX, 79XX, 88XX, 89XX, 99XX.

Cisco IP Phones must be registered to a Cisco UCM or HCS or Webex Calling Dedicated calling platforms.

To access Contact Manager service, you just have to press the specific “Directory” button on your IP Phone. If it does not connect, please ask your system administrator to enable it.

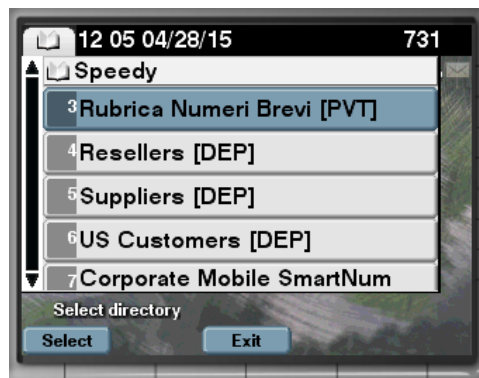
Pls. see an example below:



3.1 Search & Browse directories and contacts on your phone

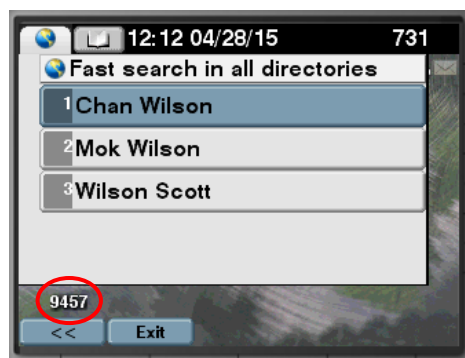
Once into “directory” phone menu, you can scroll down up to Contact Manager directories. By click on this option, you access to Contact Manager submenu where you can find the list of directories you have granted the access. This list includes three different types of directories:

1. **[PUB]** = Public Directory: it includes contacts which are accessible to every Contact Manager enabled user. You can search and browse this directory, but you cannot change it.
2. **[DEP]** = Department Directory: it includes contacts which are accessible to Contact Manager enabled user associated to a specific department. You can search, browse and modify it by adding, changing and removing contacts.
3. **[PVT]** = Personal Directory: This is a directory that has been created by you, therefore you can search, browse and modify it by adding changing and removing contacts.



Other than directories list, you can find two different contact search options:

1. **Search all directories:** This option allows you to search in all directories using a “simple” mode, with one search field (google like), or an “Advanced” mode, where you can specify first/last name, company, business phone, etc.
2. **Fast search:** This option allows you to search in all directories using the numeric keypad in a similar way as “T9” contact search on mobile phones. Just as an example, if you need to search for all contacts named “Wilson”, you should enter the digits 945766. See picture below.

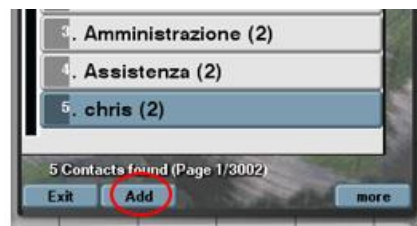


Returned search results are including entries with any diacritic marks associated to same letter. As an example, if you search for “Muller”, search results include Müller, too.

To call the contact or just to see further details, you just have to click on one contact name. You will see all phone numbers available for this contact, with the option to “Dial” contact, “Edit” contact details (if authorized) or view “Info” like company name, email, etc. See screenshot below:



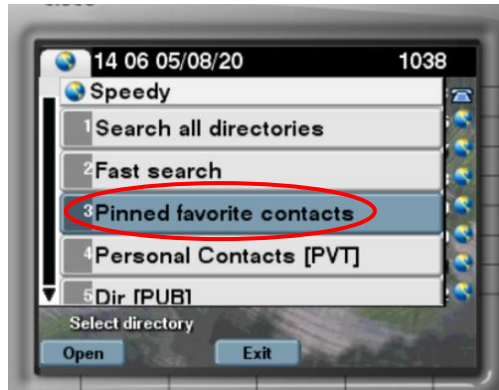
On your department's directories and on your personal directories, you can also add/modify contacts:



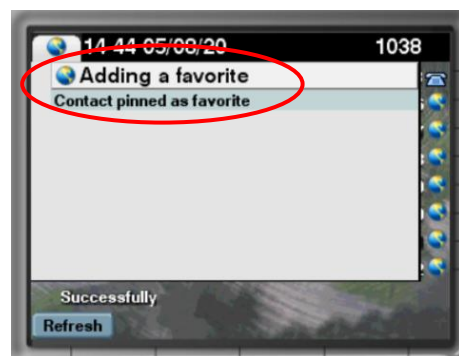
Imagicle Contact Manager's phone service includes a "Back" button, to go back one level in menu tree, and optionally an "Exit" button to escape Contact Manager service.

3.1.1 Favorites Directory

If your system administrator has enabled this feature, every named user can pin contacts, included in Public or Private directories, as **favorites**. Those contacts are subsequently included into the directory called “Pinned favorite contacts”, accessible from main Contact Manager menu:



To add a new contact into above directory, just browse your contacts and locate those to be added. Access to contact details and hit the “Pin” button. You will get a confirmation message:



Favorites added from IP Phone directory service are not available in Jabber/MS-Teams gadgets, web portal, mobile app and Attendant Console.



3.2 Caller ID

Thanks to the immediate pairing of the calling number with the contact in your directories, you get all the info you need right away on your phone's display.

Based on how your system administrator has configured this, you can either get the contact name in your received/placed call list or not.



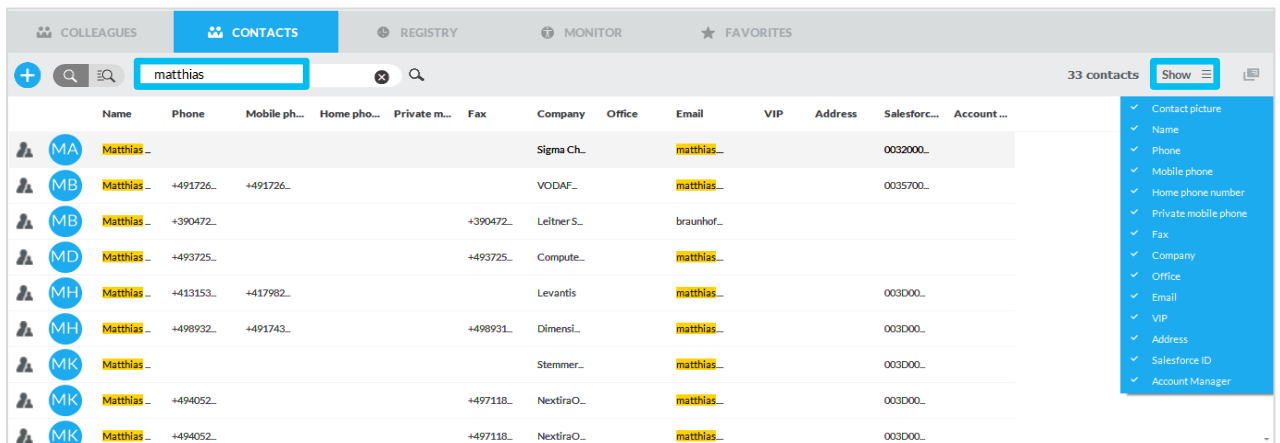


4 Contact Manager – Attendant Console

Contact Manager contacts are accessible from Attendant Console, whatever version you are using: One , Professional, .

When Attendant Console client is running in full screen mode, you can click on “Contacts” tab to search, view, modify and delete contacts.

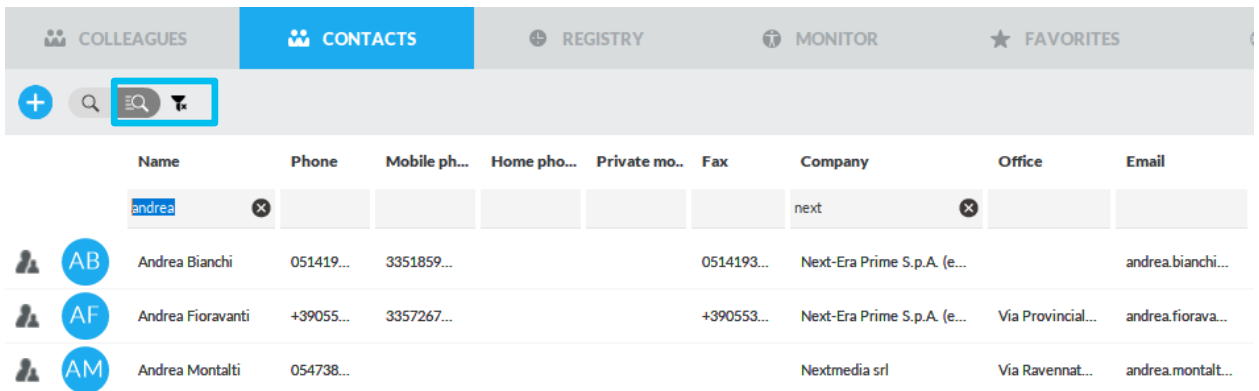
Contacts tab provides a single search field and it acts as a Google-like search on all directory’s fields, including name, surname, phone numbers, etc. See screenshot below.



The screenshot shows the 'CONTACTS' tab in the Attendant Console. A search bar at the top contains the text 'matthias'. Below the search bar, there are 33 contacts listed in a table. A 'Show' button is visible in the top right corner of the table area. A filter menu is open on the right side of the table, listing various fields that can be filtered, such as Name, Phone, Mobile phone, Home phone number, Private mobile phone, Fax, Company, Office, Email, VIP, Address, Salesforce ID, and Account Manager.

Name	Phone	Mobile ph...	Home pho...	Private m...	Fax	Company	Office	Email	VIP	Address	Salesforc...	Account ...
MA Matthias						Sigma Ch.		matthias			0032000...	
MB Matthias	+491726...	+491726...				VODAF...		matthias			0035700...	
MB Matthias	+390472...				+390472...	Leitner S...		braunhof...				
MD Matthias	+493725...				+493725...	Compute...		matthias				
MH Matthias	+413153...	+417982...				Levantis		matthias			003D00...	
MH Matthias	+498932...	+491743...			+498931...	Dimensi...		matthias			003D00...	
MK Matthias						Stemmer...		matthias			003D00...	
MK Matthias	+494052...				+497118...	NextiraO...		matthias			003D00...	
MK Matthias	+494052...				+497118...	NextiraO...		matthias			003D00...	


An advanced search feature allows to search contacts by adding one or more filter on each available field. You can click on black funnel icon to clean all filters. See screenshot below.



The screenshot shows the 'CONTACTS' tab in the Attendant Console. A search bar at the top contains the text 'andrea'. Below the search bar, there are 3 contacts listed in a table. A filter icon (funnel) is visible in the top right corner of the table area.


Name	Phone	Mobile ph...	Home pho...	Private mo...	Fax	Company	Office	Email
andrea						next		
AB Andrea Bianchi	051419...	3351859...			0514193...	Next-Era Prime S.p.A. (e...		andrea.bianchi...
AF Andrea Fioravanti	+39055...	3357267...			+390553...	Next-Era Prime S.p.A. (e...	Via Provincial...	andrea.fiorava...
AM Andrea Montalti	054738...					Nextmedia srl	Via Ravennat...	andrea.montalt...


Returned search results are including entries with any diacritic marks associated to same letter. As an example, if you search for “Muller”, search results include Müller, too.


To view full contact’s details, you can select one contact and click on  icon to pop-up a new window with all contact’s data. See screenshot below.



Create Contact ✕

 **John Evans**
Imagicle

Imagicle Directory  Contatti Condivisi (shared with DEV department) ▾

Phone 	0584943232	25
Mobile phone	39987700	
Home phone number		
Private mobile phone	33344221	
Fax		
Email	john.evans@imagicle.com	
Office	0584943232	
Job title	Marketing manager	
Birthday	12/09/1990	
Website	www.imagicle.com	

OK CANCEL

Depending on your permissions, from pop-up window you can also edit contact's data or fully delete the contact. Moreover, "Create new contact" option allows you to add a new contact and assign it to a specific directory.

5 Gadget for Cisco Jabber and Webex clients

Contact Manager application includes a free gadget called **Contacts**, which allows you to browse, search and dial contacts you have granted the access. You can access to this feature by clicking on “Contact Manager” button available on left pane.

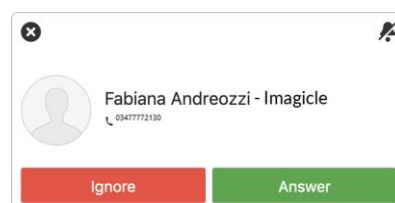
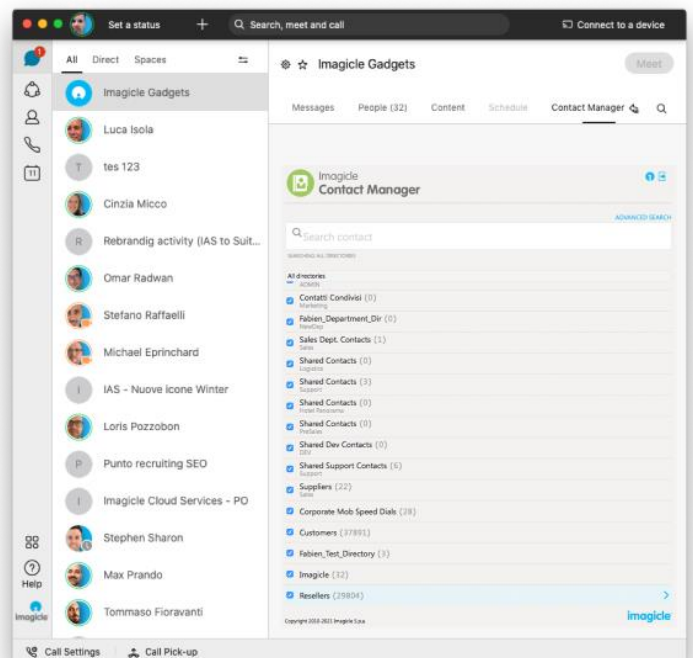
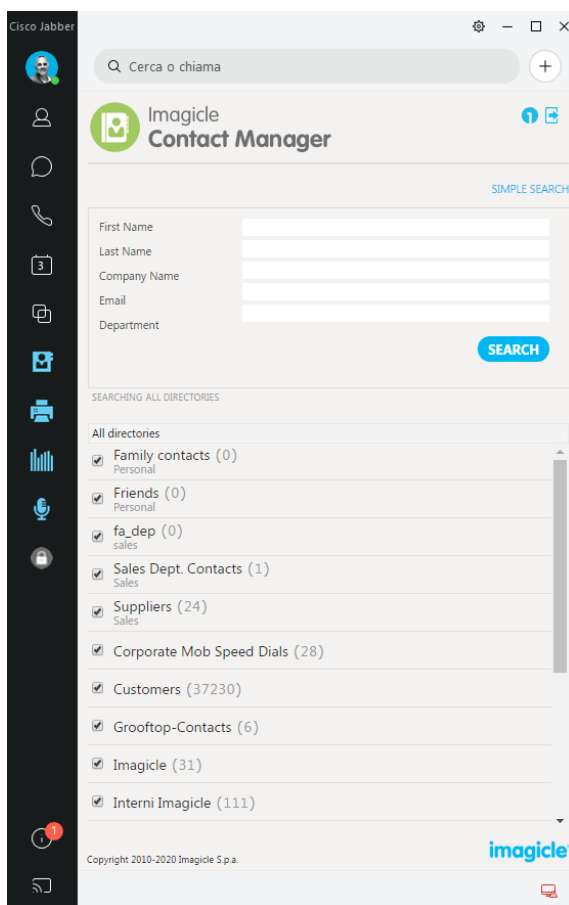
You can login to gadgets by leveraging same credentials you use for web portal. The administrator can decide to keep the gadget sessions alive for a long period of time, as per your local policies.

In this case, you have the option to search in all external directories by using a single field or by using “Advanced Search”. Otherwise, you can double-click on any directory to browse its content. Returned search results are including entries with any diacritic marks associated to same letter. As an example, if you search for “Muller”, search results include Müller, too.

Once you have found the contact you are looking for, you can simply click on **blue** phone number’s link available in contact details, to trigger an outgoing phone call to that number, using phone device currently associated to Jabber or its own softphone.

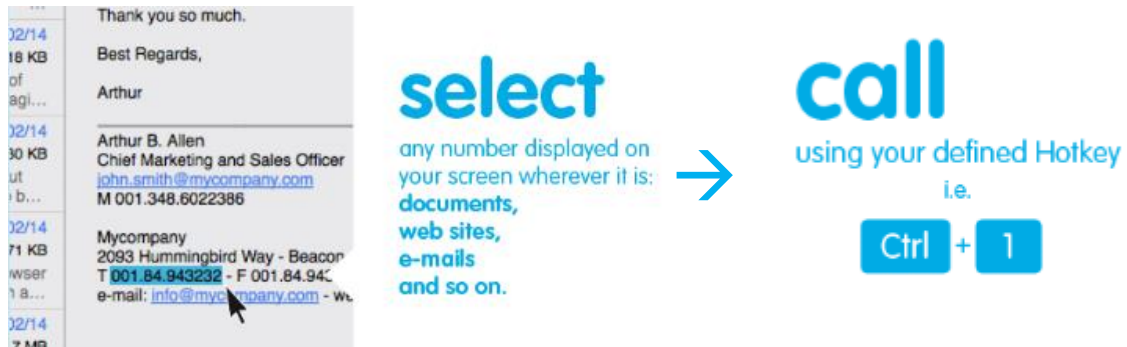
You can also add and modify contacts with same permissions you have from the web interface, detailed above. Speed dial numbers can also be dialed and edited from Contact Manager gadget for Jabber.

And you can display callerID, if the caller number is available in your directories:

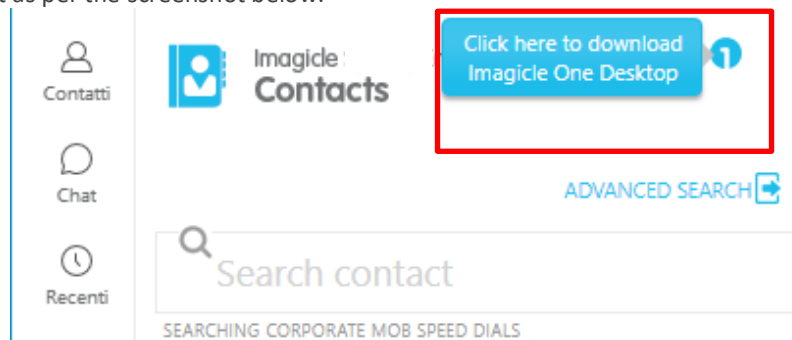


5.1 Clip and Dial

Thanks to the Imagicle Gadget for Jabber Desktop PC, it is possible to add Clip and Dial functionality from any app: just select a number and press CTRL-1 (or the configured hotkey) to dial it.



To enable the Clip and Dial functionality, you need to install the Imagicle One Desktop tool once, by clicking on top of the Gadget as per the screenshot below.



Then you need to right click on One Desktop icon in the Systray and Enable the service: the icon will turn to Blue color when enabled.



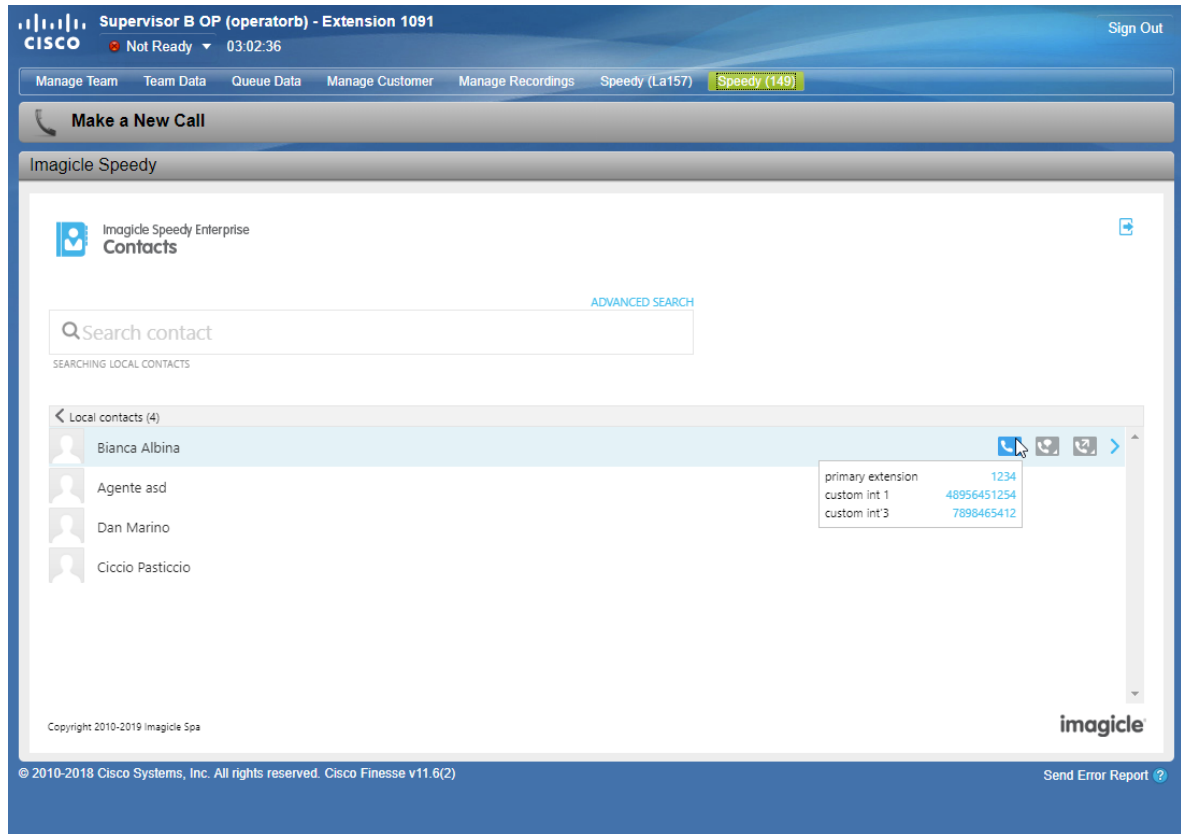
Through the Options link you can change the HotKey to trigger the to the selected number.

It is also possible to automatically add an outgoing call prefix (if required) for Clip&Call.

This feature does not support SSO and it is not supported by Cisco Webex PC client.

6 Gadget for Cisco Finesse web client



Contact Manager application includes a free gadget for Finesse, which allows you to browse, search and dial contacts you have granted the access. You can access this feature by clicking on “Contact Manager” panel.



You can login to gadget by leveraging same credentials you use for web portal. The administrator can decide to keep the gadget session alive for a long period of time, as per your local policies.




In this panel, you have the option to search in all external directories by using a single field or by using “Advanced Search”. Otherwise, you can double-click on any directory to browse its content. Returned search results are including entries with any diacritic marks associated to same letter. As an example, if you search for “Muller”, search results include Müller, too.

Once you have found the contact you are looking for, you can click on the **blue** phone number’s link available in contact details to trigger an outgoing phone call to that number, using a phone device currently associated with the user.

Finesse Contact Manager gadgets also offers the feature of transferring an active call to a Contact Manager contact, by clicking on   icons to respectively trigger a transfer with consultation or a blind transfer.

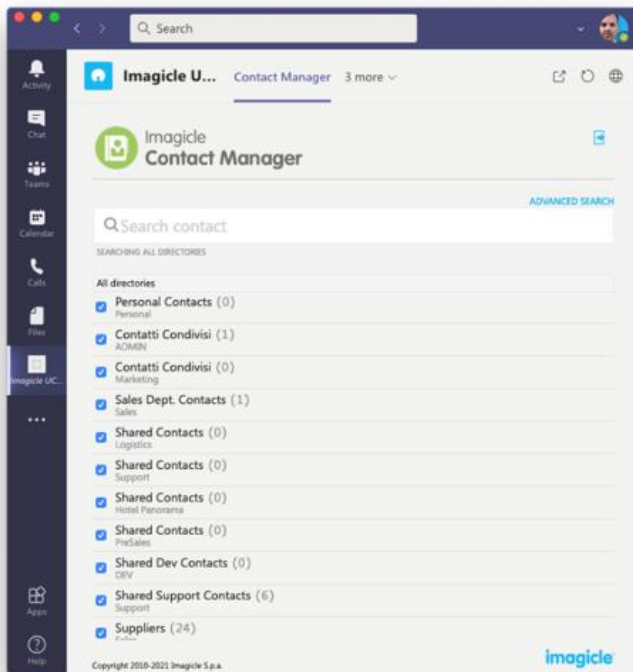


The screenshot shows the Cisco Supervisor B OP interface for extension 1091. The user is logged in as 'operatorb' and is currently 'Not Ready'. The interface includes a navigation bar with options like 'Manage Team', 'Team Data', 'Queue Data', 'Manage Customer', 'Manage Recordings', 'Speedy (La157)', and 'Speedy (149)'. Below this, there are call control buttons: 'Keypad', 'Hold', 'Consult', and 'Direct Transfer'. The main content area is titled 'Image Speedy' and shows 'Contact details' for 'Bianca Albina'. A profile picture placeholder is visible. The contact information is as follows:

primary extension	1234	
custom int 1	48956451254	  
custom int. 2	R&D	 48956451254
custom int 3	7898465412	
directory	Local contacts	

You can also add and modify contacts with the same permissions you have from the web interface, detailed in the previous paragraph. Speed dial numbers can also be dialed and edited from Contact Manager gadget for Finesse.

7 Application for Microsoft Teams PC client



Contact Manager application includes an Application for MS-Teams, called **Imagicle Directory**, which allows you to browse and search for all contacts you have granted the access. You can access to this feature by clicking on “Imagicle Directory” button available on left pane.

You can login to the app by leveraging same credentials you use for web portal. The administrator can decide to keep the app session alive for a long period of time, as per your local policies.

You have the option to search in all directories by using a single field or by using “Advanced Search”. Otherwise, you can double-click on any directory to browse its content.

Returned search results are including entries with any diacritic marks associated to same letter. As an example, if you search for “Muller”, search results include Müller, too.

Once you have found the contact you are looking for, you can simply double-click on contact name to display contact details and all phone numbers associated to it.

You can also add and modify contacts with same permissions you have from the web interface, detailed above. Speed dial numbers can also be edited from Contact Manager application.

