Contact Manager

User Guide

Included in the Imagicle UCX Suite

Rel. Winter 2024

Content

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 UC Suite overview

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

The Imagicle UC 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, browsers, and mobile devices (iOS-Android Smartphones & tablets).
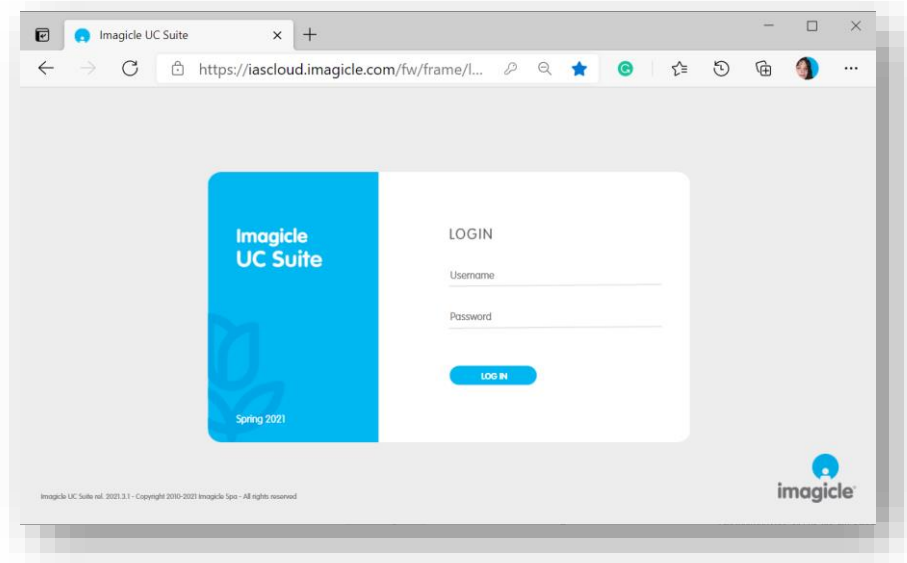
All the applications can be accessed through an easy to use Web Interface: Digital Fax, Call Analytics, Contact Manager Services-CallerID-ClickToCall, Attendant Console-CTI-Advanced Queueing, PhoneLock, Call Recording and more.

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 Firefox, Chrome or Safari, and enter the name or IP address of Imagicle server. This will bring the Imagicle Suite login page:
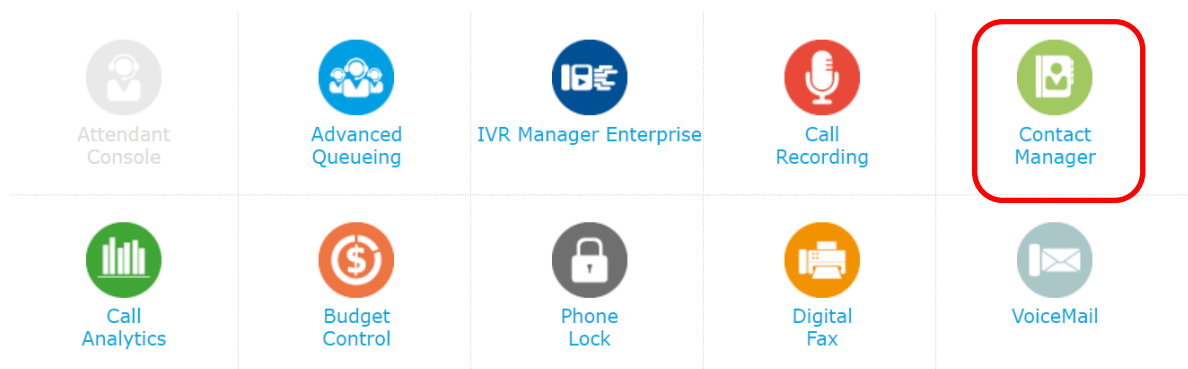

Normally, users' credentials are the same as Windows PC logon (Active Directory). Pls. contact your IT administrator for further details.

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).

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:

- <u>Simple search</u> provides a single search field and it acts as a Google-like search on all directory's fields, including name, surname, phone numbers, etc.
- <u>Advanced Search</u> 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.

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.

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 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.

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	Steve		
Last Name	Miller		
Company Name	Steve Miller Band		
Email	steve.miller@company.com		
Postal Address			
Fax	0459966554	Speed Dial	2568
Home Phone	0459955443	Speed Dial	2569
Business Phone	08833554477	Speed Dial	2567
Mobile Business	0998225587	Speed Dial	2566
Mobile Private		Speed Dial	
Salesforce ID			

Update   Cancel

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	Scegli 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.

Import   Show Reports...

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.
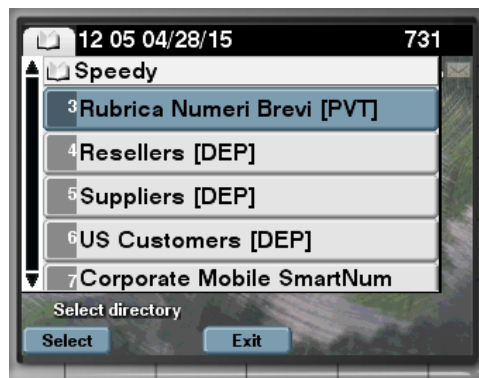Pls. see an example below:

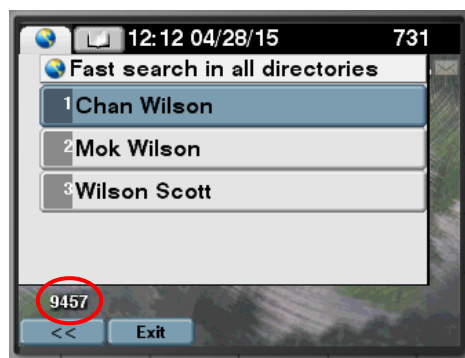## 3.1 Search & Browse directories and contacts on your phone

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 <u>one search field</u> (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.
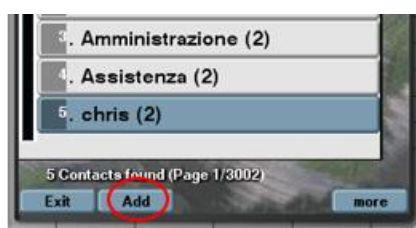

Returned search results are including entries with <u>any diacritic marks</u> associated to same letter. As an example, if you search for "Muller", search results include Müller, too.
To call the contact or just to see further details, you just have to click on one contact name. You will see all phone 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:
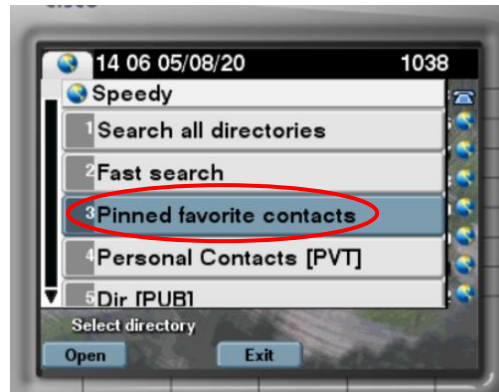
On your department's directories and on your personal directories, you can also add/modify contacts:
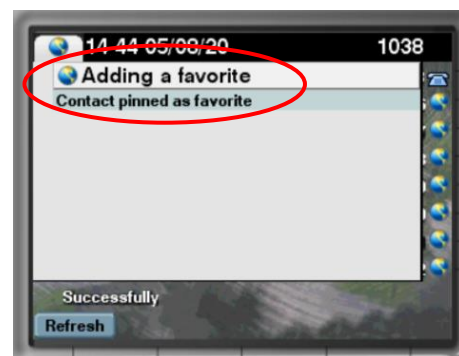

Imagicle Contact Manager's phone service includes a "Back" button, to go back one level in menu tree, and optionally an "Exit" button to escape Contact Manager service.

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.
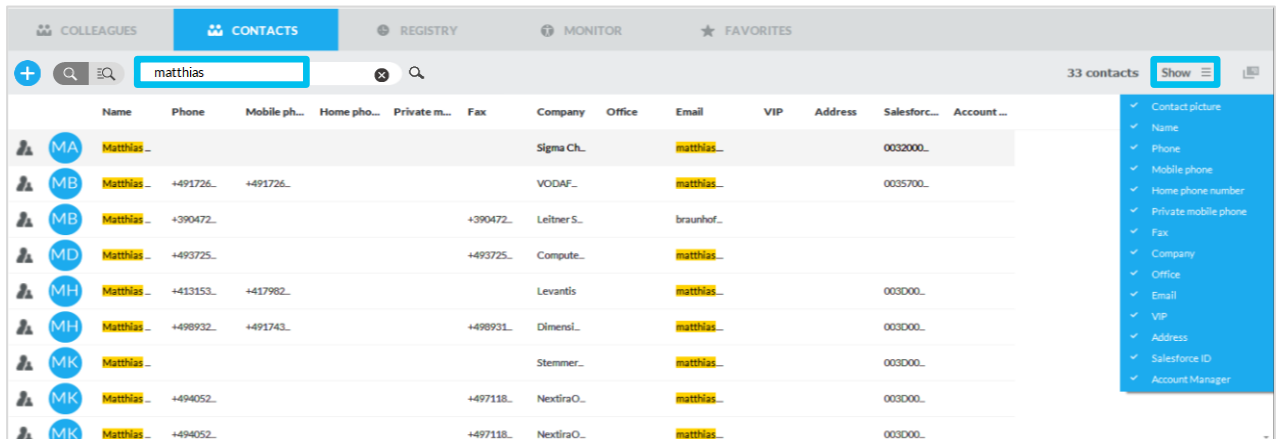
4 Contact Manager – Attendant Console

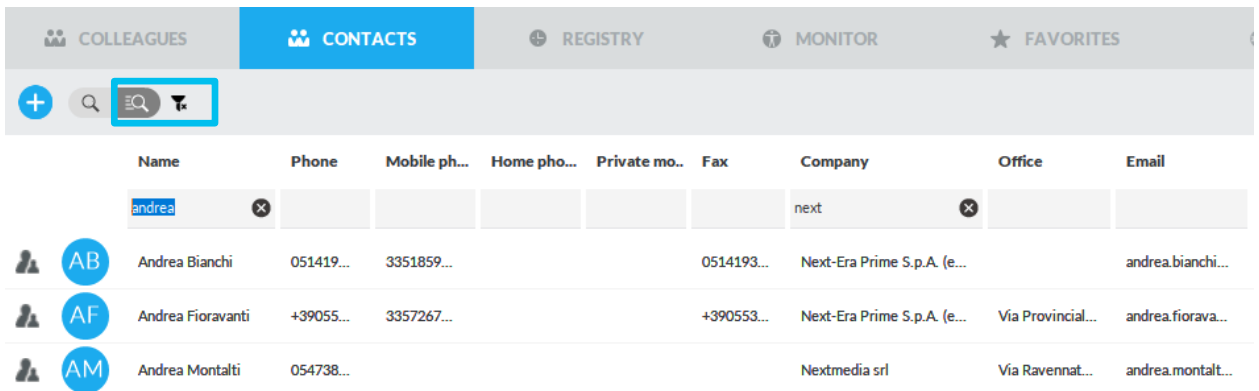Contact Manager contacts are accessible from Attendant Console, whatever version you are using: One , Professional, .
When Attendant Console client is running in full screen mode, you can click on "Contacts" tab to search, view, modify and delete contacts.
Contacts tab provides a single search field and it acts as a Google-like search on all directory's fields, including name, surname, phone numbers, etc. See screenshot below.

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.

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] icon to pop-up a new window with all contact's data. See screenshot below.

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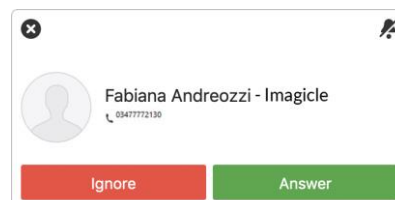
Once you have found the contact you are looking for, you can simply click on **blue** phone number's link available in contact details, to trigger an outgoing phone call to that number, using phone device currently associated to Jabber or its own softphone.

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 is currently 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.
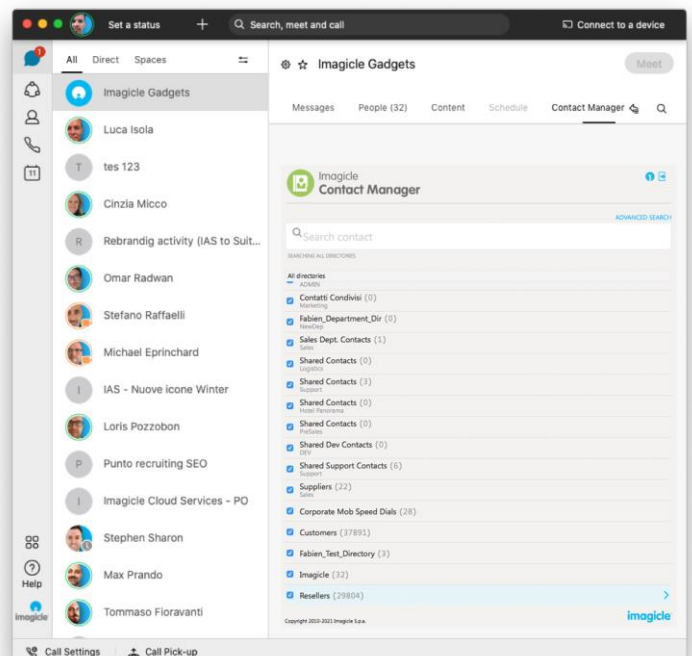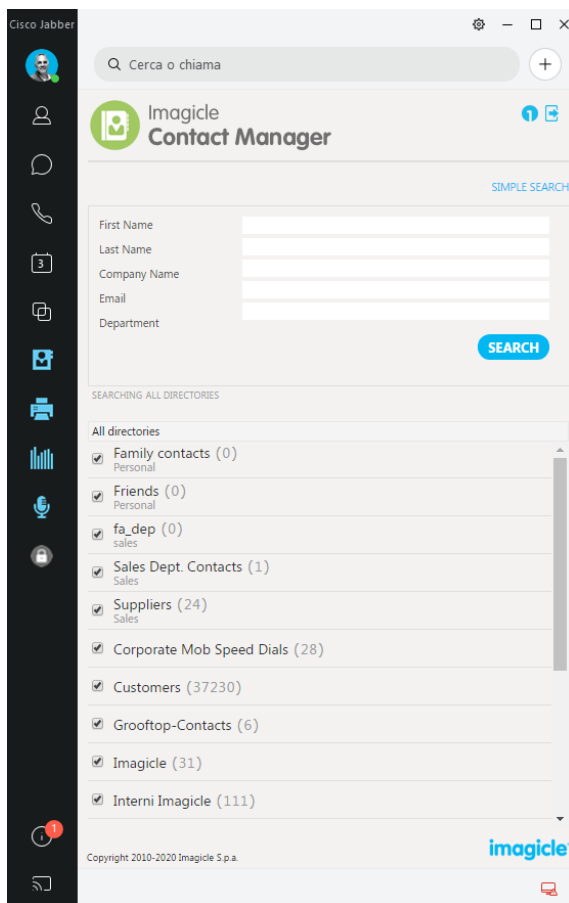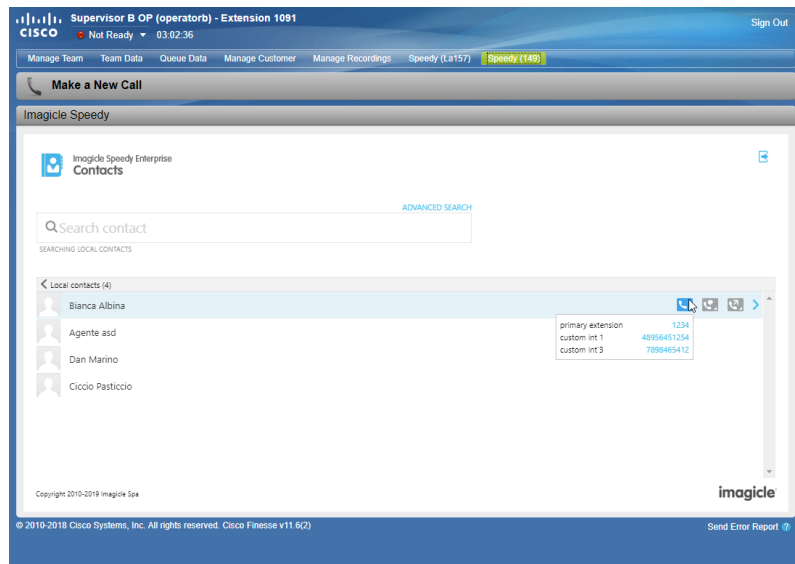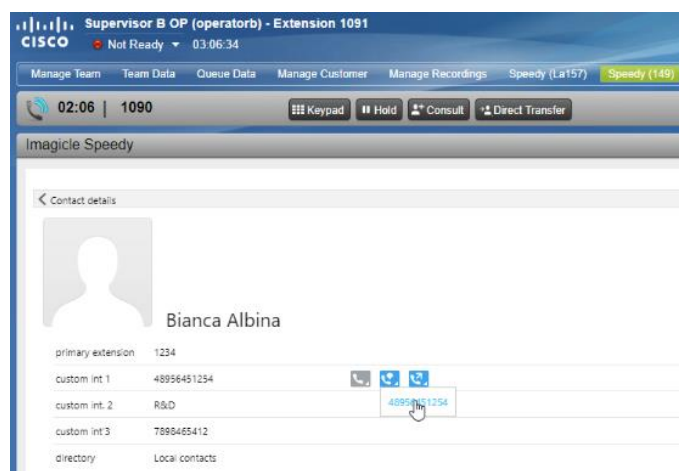

You can login to gadget by leveraging same credentials you use for web portal. The administrator can decide to keep the gadget session alive for a long period of time, as per your local policies.

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 [icon] [icon] cons to respectively trigger a transfer with consultation or a blind transfer.

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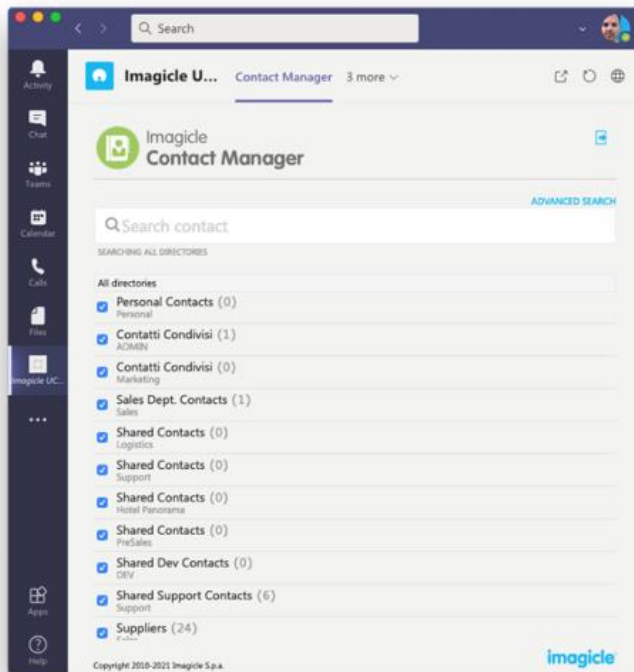
Once you have found the contact you are looking for, you can simply double-click on contact name to display contact details and all phone numbers associated to it.

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.

8 Contact Manager – Imagicle Contacts App

Imagicle Contacts is a Contact Manager App developed for iPad/iPhone and Android devices, which easily and quickly allows you to browse, search and call any contact available into your directories.
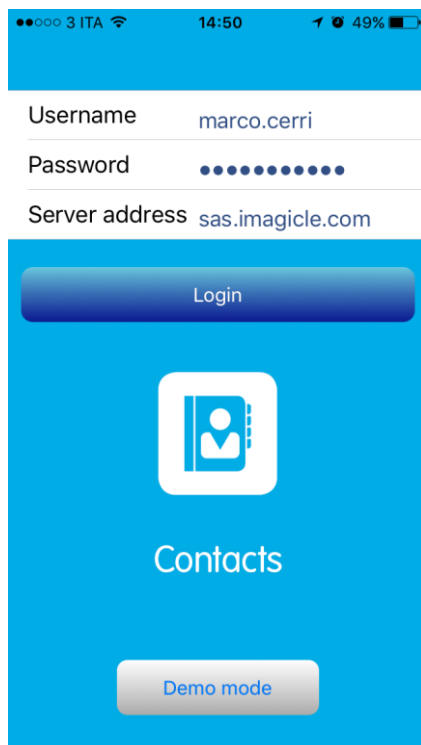
With Imagicle Fax, StoneFax is the first IP Fax server which extends fax functionalities to mobile devices, empowering your communications system at the top level, for both Small-Medium s and large corporates.

You can freely download the app for your smartphone or your Cisco DX device, straight from relevant online stores:
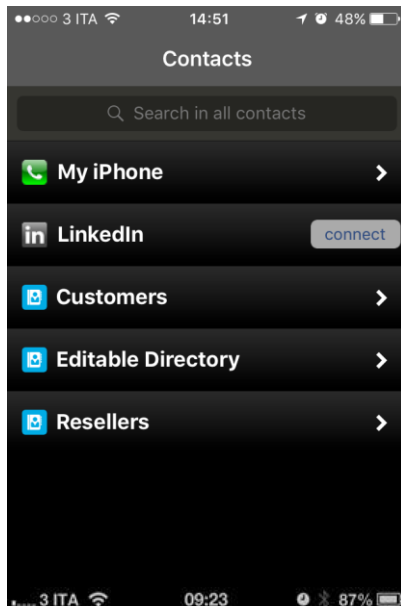
8.1   Imagicle Contacts Configuration

Imagicle Contacts requires, at first run, to enter some UC Suite parameters and personal Contact Manager user's credentials. This configuration is the same for both Apple and Android devices:
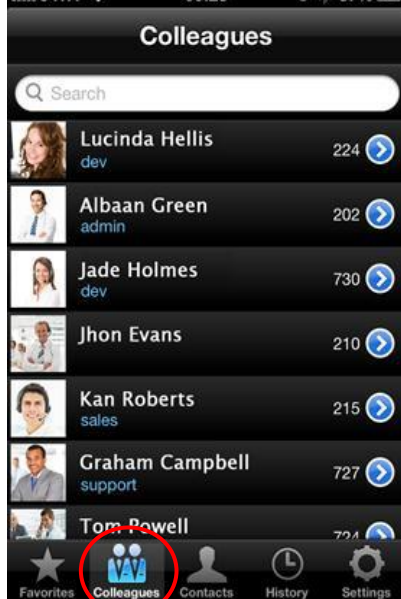
- o   UC Suite **Username**, as configured in Imagicle server

- o   User's **Password**, as configured in Imagicle server

- o   UC Suite **IP address**. Ask your administrator for correct address.

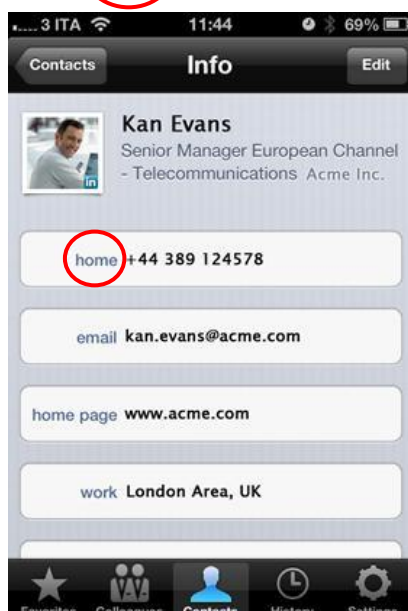Click on "Login" to access to main menu.

→ By entering any type of contact detail, even partial data, you activate a search in all Contact Manager directories: Corporate & personal. Search results include all contacts which contains search string (in one or more fields). 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.

→ Moreover, you can start a search in "Colleagues" directory, which includes all internal phone extensions in your Company. Search procedure follows the same rules of other Contact Manager directories.

→ Touch one contact to retrieve the list of his/her available phone numbers. See screenshot below.

→ Call "home"

Three calling options:
- Cisco Jabber Mobile
- Skype   →
- My iPhone (GSM)