Contact Manager

26 Apr 2024

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Administration Guide

Product Description

Contact Manager is Imagicle solution for centralized contacts management. Contact Manager lets you create an **unlimited number of directories** to hold the company external contacts.

The directories can be browsed, searched and managed through an easy to use **web interface** or through other **Imagicle applications** (e.g. Attendant Console, Desktop CTI, Digital Fax, Advanced Queuing...). The web interface also supports **click-to-dial** on Cisco UCM Calling Platforms.

The contacts can be added through the web interface, imported from a .csv file or **synchronized** with external data sources.

Contact Manager natively supports standard LDAP protocol. Moreover, Imagicle Meta Connector ver. 5.0 is available for synchronizing contacts from **virtually any source** (MS Exchange, OpenLdap, ODBC database, CRM ...) and make them available to all the company employees

Contact Manager is part of Imagicle UC Suite.

Public, department and personal directories

Contact Manager can create three kind of directories:

- Public directories: everybody can see them
- Department directories: these can be accessed only by the members of a department
- Personal directories: each user on your organization can create and manage his / her directories. Those are private and can be accessed only by their owner

The limits to the directory visibility are inherited by all Imagicle applications. In addition when you create a directory you can choose whether all users will be able to modify it or if the contacts will be added or removed only by administrators.

Department Directories are especially suitable for large companies with many branches. With Contact Manager managing thousands of contacts is very easy.

Fully customizable

Contact Manager can hold five contact's personal information details plus five telephone numbers, with relevant "Smart Numbers" (speed dial). If this is not enough for the customer needs, you can activate **up to ten additional fields**.

Add New Contact - Public Contact

First Name	Robert
Last Name	Smith
Company Name	ACME Inc.
Email	john.smith@acme.com
Postal Address	

Fax	7665559987	Speed dial	100
Home Phone		Speed dial	
Business Phone	7665554477	Speed dial	200
Mobile Business	3965550921	Speed dial	201
Mobile Private		Speed dial	

Insert   Cancel

The web interface can be **fully customized**. You can choose which field can be searched or displayed in the results list.

WHO ARE YOU LOOKING FOR?

Options (Show) | Simple

Last name	
First name	
Email	
Primary Ext number	
Department	

Search

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Options (Show) | Advanced

john smith

Search

Contact found: 2 of 2

NAME	PHONE NUMBER
Smith John Acme inc.	5553414314 00412431531513 33341414141 004153425425

Note: the additional custom field are hidden by default. Displaying an additional field on the web interface or on the IP phone requires manual configuration. **Please contact Imagicle Support Team to receive detailed instructions.**

Imagicle Contacts

Imagicle Contacts is the perfect Contact Manager companion. It is a free application for your iPhone/iPad and Android which integrates with Contact Manager to bring your contacts with you. Imagicle Contacts allows you to access all your company directories, your personal contacts, Linkedin and Skype with a single search.

It can place calls from your phone but also from Skype and Cisco Jabber.

You may create a new list of your Favorite contacts and access a dedicated tab with the list of your Colleagues, always up-to-date and with all details.

Contact Manager: Manage & Organize Professional Business Contacts Software Solution - Imagicle

Product Configuration

User's Details

For each IAS User that is to use Contact Manager, the **First Extension Number** field must be filled in the User Configuration form. The "Mac Address" and "PBX username" may be required on some telephony systems.

You can access the User Configuration form in the IAS web interface by clicking "Admin->User Management", selecting a user and the pressing the "Modify" button.

If you plan to use department directories, you may assign the user to a **department** by filling the related field. The value must match exactly the Department field entered while creating the directory. See also "Managing Directories" in the Operation section.

If you want this user to be able to access the directories of more than one department, list their names in the **List of additional departments** field, separated by semicolon ";".

If you fill other **personal details**, such as home phone, office location... They will be included in the special read-only directory which includes all the internal contacts. This directory can be accessed either by Contact Manager web search or through the CTI applications (Imagicle Attendant Console). The only way to edit those directory contacts is through User Management.

You may want the user to be displayed with a different number whenever it is displayed (e.g. in QME searches, on the attendant console, in web searches, on the Caller ID searches, in the Colleagues list..). If this is the case, in the **Published Directory Number** field, please enter the number you want to be displayed in place of the first extension.

- If you want to hide the user, enter **-** in the **Published Directory Number** field.
- If you want the First Extension to be excluded from the Local Contacts directory, but you still want to include other numbers (fax, mobile..) enter **#** in the **Published Directory Number** field.

If you plan to use department directories, you may assign the user to a department by filling the related field. The value must match exactly the Department field entered while creating the directory. See also "Managing Directories" in the Operation section.

User's Permissions

Once these fields have been set, review the user's permissions. The following access levels are available:

- No access - The user can see the directories neither on the prone nor by the web interface
- View Directories - The user has web and phone access to public, private and department directories
- Edit Department Directories - Same as View Directories, but the user can always edit the directories of his / her department by web and by phone
- Edit All Directories - Complete read / write access to all public and department directories
- Complete Management - Complete access to all the public and department directories. The user may also stop and start the Contact Manager service.

For more information please see below, "Understanding Contact Manager Permissions".

Numbering Plan Parameters

When working on incoming and outgoing calls, Contact Manager must know some information on your company numbering plan, prefixes and so on.

Please set the telephony parameters as described in the General configuration section of this guide.

Configuring how the caller name is displayed

It is possible to configure the lookup result modifying this parameter, that represent a list of tags, that Imagicle Application Suite replace with contact informations returning from lookup. Available tags are shown in web page. It is possible to specify more than one format string, the top-most one containing only non empty placeholders will be used.

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In Imagicle Application Suite Web configuration portal, go to Contact Manager page, Manage Service.
In Service Configuration Section change the "Display Name Formatting rules" text box, according to the desired format.

Example:
Contact First Name: John
Contact Last Name: White
Contact Company: Acme

Display Name formatting rules:
$$FIRSTNAME$$ $$LASTNAME$$ - $$COMPANY$$
Result -> **John White - Acme**
$$COMPANY$$
Result -> **Acme**
$$FIRSTNAME$$ $$LASTNAME$$
Result -> **John White**

Contact First Name: Marc
Contact Last Name: Bloom
Contact Company: - (Empty)

Display Name formatting rules:
$$FIRSTNAME$$ $$LASTNAME$$ - $$COMPANY$$
$$FIRSTNAME$$ $$LASTNAME$$
$$LASTNAME$$ - $$COMPANY$$
$$COMPANY$$
$$LASTNAME$$
Result -> **Marc Bloom**

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Synchronizing contacts with external sources

Contact Manager can keep directory contacts aligned against an LDAP source. If you install **Meta Connector** ver. 5.0 on the Imagicle UC Suite, you can import and synchronize external contact from several sources.

Here is an example on how to create a synchronized directory which imports contacts from Active Directory. The procedure for other sources (e.g. MS Exchange..) is similar. Please refer to Estos documentation for more details.

1. Create a new synchronized directory

Please access to Imagicle web portal and go to *Contact Manager â   Manage Directories* page, create a new Directory flagging the option Synchronized and enter the IP address of the server where Meta Connector 5.0 is installed on (it can be 127.0.0.1 if installed on the UC Suite server). LDAP port is 712, using the credentials choosen during Meta Connector 5.0 installation.

2. Configuring the replicator

Estos MetaDirectory 5.0 Replicators List

Replicator for IBM NotesÂ®
Replicator for DATEV SDD
Replicator for Steps Business Solution
Replicator for MicrosoftÂ® CRM ï · Replicator for MicrosoftÂ® Exchange Webservice (EWS)
Replicator for MicrosoftÂ® Dynamics Navision
Replicator for MicrosoftÂ® Outlook/Exchange
Replicator for Active DirectoryÂ® Server
Replicator for LDAP Servers
Replicator for MetaDirectory
Replicator for ODBC Databases
Replicator for Text & CSV Files
Replicator for Salesforce CRM
Replicator for Google Contacts (G-Suite)
Custom Replicator
Export Replicator for Active DirectoryÂ® Server
Export Replicator for XML Files
Export Replicator for CSV Files

Log onto the server where Meta Connector is installed on. Open Metadirectory Administration tool through the Start menu link.

Locate the "Replicators" and add a new one.
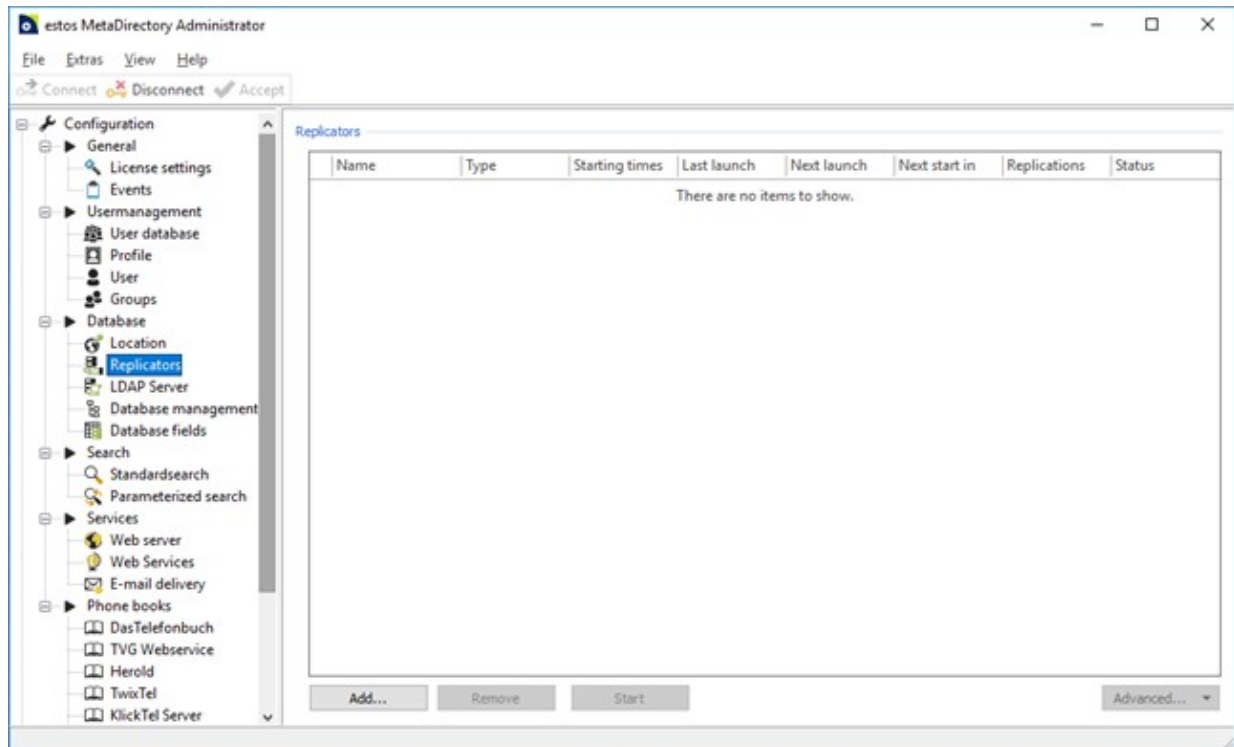
Select the "Import" replicator type.
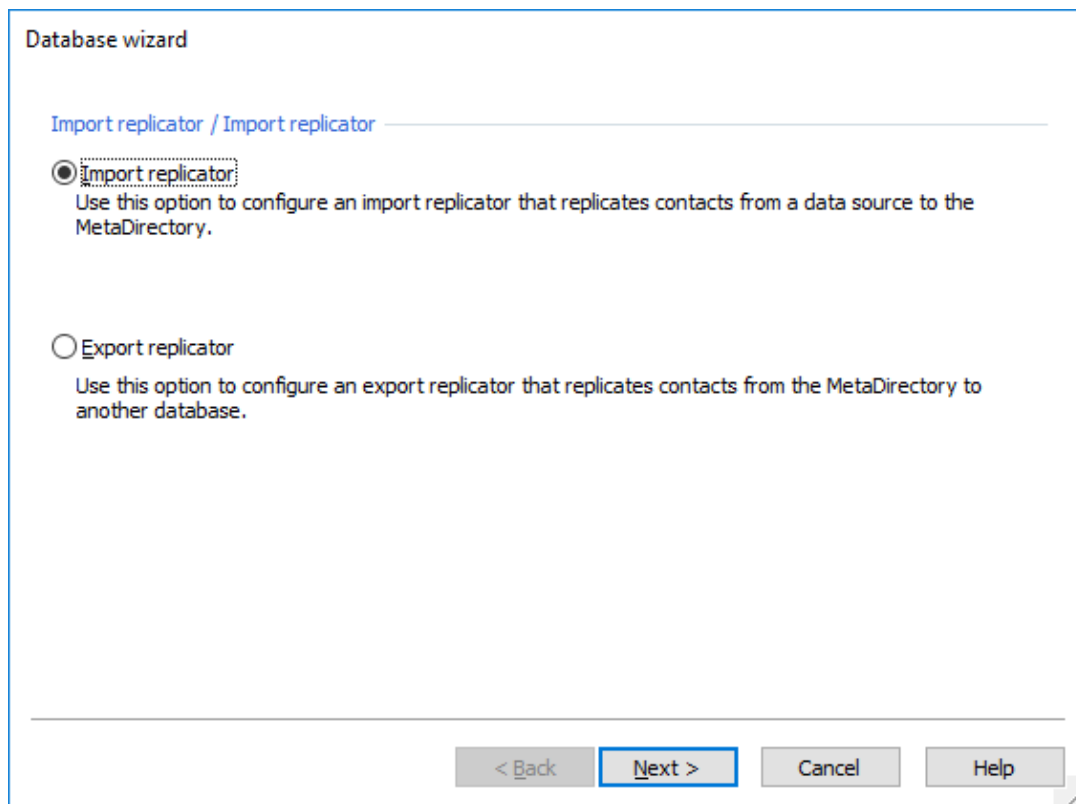
Select the Data Source type and follow the wizard.

```
â  NOTES:
— Salesforce Data Source: Estos guide here
(A valid SalesForce account authorized to use Salesforce API with a security token)
```

Configure fields mapping using below table:

How to map Meta Connector 5.0 database fields to Contact Manager

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This table shows how to map Meta Connector fields to Contact Manager fields.

Source Table = Fields takes from the source
Destination Table (Field Name) = Meta Connector Fields
Destination Table (Assigned Fields) = Source fields assigned to Meta Connector fields

Meta Connector Field Name	Contact Manager web portal Label
First name	First Name
Last name	Last Name
Company	Company
E-mail	Email
PrivatePhone	Home Phone
BusinessPhone	Business Phone
MobilePhone	Mobile Business
PagerPhone	Mobile Private
BusinessFax	Fax
Street Private	PostalAddress
Private Phone 2	Speed Dial Home Phone
Business Phone 2	Speed Dial Business Phone
Mobile Phone 2	Speed Dial Mobile Phone
User1	Custom1
User2	Custom2
User3	Custom3
User4	Custom4
User5	Custom5
User6	Custom6
User7	Custom7
User8	Custom8
User9	Custom9
User0	Custom10

Schedule the replication time. Please keep in mind to schedule it before actual LDAP synch configured on Contact Manager web portal.

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Database wizard

Settings

Start on:

	May 2019					
Sun	Mon	Tue	Wed	Thu	Fri	Sa
28	29	30	1	2	3	
5	6	7	8	9	10	1
12	13	14	15	16	17	1
19	20	21	22	23	24	2
26	27	28	29	30	31	
2	3	4	5	6	7	

Start at:

10:21:37 AM

Execute:

○ Manually
○ Monthly
○ Weekly
⦿ Daily
○ All   2   Days

< Back   Next >   Cancel   Help

3. Configure Contact Manager synchronization in UC Suite web page.

Imagicle
ApplicationSuite
for Cisco UC

Directory   Search Contacts   Manage Directories   Synchronize Contacts   Manage Ser

+ Create New Directory | 🗑 Delete selected directories

Create New Directory

Type	Public ▼
Name	AD_Imagicle_Completo
Vip Directory	☐
Editable	☐
Synchronized	☑ ⓘ
LDAP server address	127.0.0.1
LDAP server TCP port	712
Username	Administrator
Password	Administrator
LDAP path (optional)	

Insert   Cancel

LDAP server address = Server IP where Meta Connector is installed
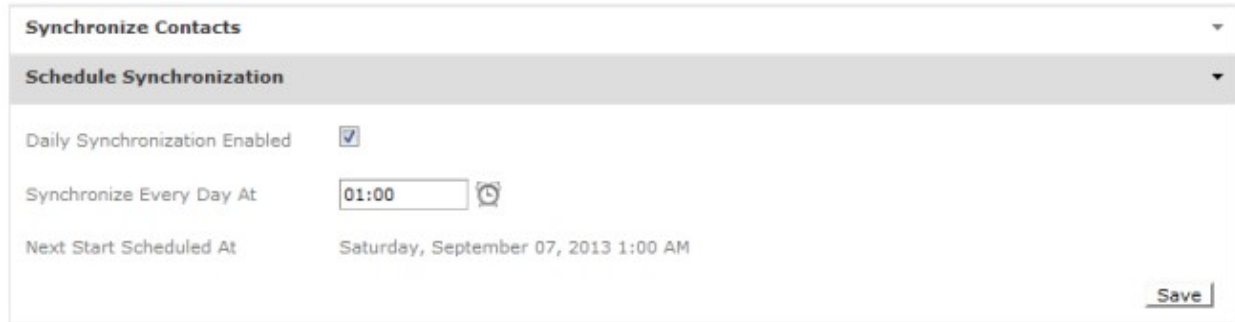
LDAP server TCP port = TCP port configured in Meta Connector (Default = 712)

Username/Password = Used to access Meta Connector administration

LDAP path = Check it in *Database-View* of Meta Connector Admin tool (Usually used for multiple Replicators)

4. Run Contacts Synchronization

Click on the **Synchronize contacts** link. After running Meta Connector import once, you can test the synchronization by clicking "Run Now" or activate daily synchronization. The settings may be different for each directory. Each user will be able to manage his or her directories depending on Contact Manager's permission level.

IMPORTANT: Please do not enable daily automatic synchronization on both Imagicle nodes associated to a HA cluster, because your directory will be corrupted. If this problem occurs, you can solve it by applying the following procedure:

- Disable automatic sync on backup node
- Delete all contact included into the corrupted directory(ies)
- Wait for replication to wipe-out contacts in the primary node, too
- Run manual sync on primary node.

If your directory includes several contacts, you can delete all of them through a SQL query. Please contact Imagicle Support for the same.

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Understanding Permissions

Each user can interact with the directories based upon the directories parameters specified hereafter:

- Directory Type: public (including department directories), private, local (including synchronized directories)
- If the Directory is meant to be modified by anyone, that is adding, editing and removing contacts
- User Permission Level for the Contact Manager application, which is set in the User Management
- Department the user belongs to
- Department to which the directory has been assigned

Access to Private Directories

The private directories can always be viewed and modified by the user that has created them if he/she has at least the base access to the application (level 2 or higher). The owner of a private directory can always add, edit and remove its contacts. The owner of a private directory can also change its description or delete the entire directory.

The private directories cannot be viewed by the administrator or by any other user. Consequently:

- The private directories cannot be assigned to a User Department.
- Devices not assigned to any user cannot display private directories

Private Directories cannot contain VIP contacts.

Access to Public and Department Directories

Contact Manager manages two types of Corporate Directories: public and department. **Public** directories are meant to be available to all IAS users, **department** directories are meant to be available to a subset (group) of the IAS users.

When a new directory is created, you can choose to restrict access to its contents to a group of users by assigning a Department to it. If you do not assign any department to the directory, it will be available to all users.

The Department property determines if a directory can be viewed (that is: browsed and searched) based on the following criteria:

- **If the user does not belong to any Department:** he/she can view all Directories (assigned AND not assigned to a specific Department).
- **If the user belongs to one or more Department:** he/she can view his/her Department directory and those that are not assigned to a Department. If no Directory has been assigned to his/her Department, then the user can only view the directories that are not assigned to a Department (that is, Public Directories).
- **User who can view all Public Directories (permission level 8 or higher):** he/she can view all Department Directories (as the User that doesn't belong to any Department), even if he/she has been assigned to a specific Department.
- **User who does not have access to the application (permission level lower than 2):** he/she cannot view any directory regardless of other access criteria.
- **Unrecognised user - anonymous requests:** he/she can view only the directories that are not assigned to any Department. This feature is not available through the web interface because you always have to login, but can affect requests from IP phones not assigned to any user.

Managing Public and Department directories

If a Directory can be viewed by a User, this doesn't necessarily mean that he/she can change its properties (like the description, department, synchronization..) or delete it. Standard User can only view the public directories.

Note: viewing a directory contents means that you can browse and search its contacts.

Contact Manager allows two administrative roles: global administrators and department administrators. Global administrators can always add, edit properties, remove and view all the directories. Department administrators are global administrators limited to one ore more department.

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The User Permission Level and the Department the user is assigned to determine the possibility to modify properties, delete or add new directories:

- **User who does not have access to the application (permission level lower than 2):** he/she cannot view any directory
- **User without modification permissions (permission lower than level 6):** he/she cannot modify the list of the directories
- **User with access to the department directories properties (permission level 6 or more):** he/she can modify, delete or create new directories of his/her department. He/she *cannot* modify the properties of directories that are not assigned to any department (i.e. public). *If the user is not assigned to a department, he/she can modify no directory*
- **User with complete access to the directories (permission level 8 or higher):** he/she can modify, delete or create new directories and can assign them to a department
- **Unrecognised user:** he/she cannot modify the list of the directories. This feature is not available through the web interface

Local Directories

While Private, Public and Department directories are meant to contain external contacts, Local Directories contain the list of the Colleagues, that is the Internal Contacts of an organization. Local Directories are always available. They are created when the administrator adds or removers users to the **users' list** in the Admin-> User Management web page.

The only way to edit the local directories is through users management. When you edit user properties, the changes are automatically reflected to the Local directories contents.

Depending on the IAS settings, there can be one Local Directory seen as a Public directory, or one Local directory for each department.

Synchronized Directories

The contacts in Synchronized Directories are imported form an external data source. Synchronized directories can be Public, assigned to a Department, or Private, and their properties can be modified following the standard rules described above.

VIP Directories

Public or Department directories, whether synchronized or not, can be marked as VIP. This affects the way those contacts are used in Queue Manager Enterprise.

Local directories cannot marked as VIP. Access to VIP directories follows the standard rules described above.

Adding, Editing and Removing the Contacts

When a directory is created, you specify if its contacts can be edited by anyone by setting the **Editable** property, meaning "modifiable". The contents of an Editable directory can be edited by all the users who can **view** them.

The administrators, that is the users who can delete a specific directory, can always edit its contacts regardless the Editable flag.

To summarize:

- **Editable (modifiable) Public or Department directory:** the contacts can be added/edited/removed by all users who can view it
- **Non-Editable (modifiable) Public or Department directory:** the contacts in these directories can be added/edited/removed only by users that have the right permission to modify or delete that very directory

Exceptions

- **Local directories** (that is, the Colleagues directories) are always read-only. The contents of local directories can only be modified through the IAS User Management.

- If a directory is **Synchronized** with an external data source, the only way to add, edit or remove the contacts is working on the source. Therefore, the contents are read-only from the Contact Manager users' perspective.
- **Private directories** contents can always be modified by the owner and by no one else.
- In any case, **not recognized users** are unable to modify the contacts in any directory.

Examples

Example 1

User Mario Bianchi has permission level 2 for Contact Manager application and belongs to the Sales department.

The administrator created the following directories:

	TYPE	VIP	EDITAE	SYNCHRONI	NAME	DEPARTMENT	VIEW	EDIT	DEL
	No Filte▼	☐ ▼			▼	▼			
☐	🔒	☐	☐	☐	Local Contacts (77)		🗂		
☐	⭐	✓	✓	✓	Corporate Mobile SmartNumbers (18)		🗂	✏	🗑
☐	🔒	☐	☐	☐	Sales (0)		🗂		
☐	⭐	✓	✓	☐	International Customers (2)		🗂	✏	🗑
☐	⭐	✓	✓	☐	DACH Team (1)		🗂	✏	🗑
☐	📶	☐	☐	☐	Suppliers (17)	Sales	🗂	✏	🗑
☐	⭐ 📶	✓	☐	☐	Partners (270)	Fastweb	🗂	✏	🗑
☐	📶	☐	☐	☐	Sales Dept (1)	Sales Imagicle	🗂	✏	🗑
☐	📶	☐	☐	✓	Customers (27061)	Sales Imagicle	🗂	✏	🗑
☐	📶	☐	✓	✓	Resellers (15295)	Sales Imagicle	🗂	✏	🗑

◀ | ▶ 1 / 2   Page 1 Of 2, Items 1 To 10 Of 12

User Mario Bianchi can see all the public directories (the ones with a blank department field). He can also see the Sales directory ("Suppliers") but has no access to the "Partners" directory.

He can then edit the contacts of those directories which have been configured as "user customisable" (editable) by the administrator, for example the International Customers directory. Of course, users cannot edit the contacts of the directories that they can't see.

Example 2

If Mario has permission level 6 and belongs to the department "Sales Imagicle".

He can see all public directories and his department directories. He cannot see "Sales". He can edit the contacts of all directories he can see that are user customisable (modifiable).

With permission level 6 Mario has full control over the directories that belong to his own department ("Sales Imagicle"), which means that he can view, modify, delete or create new directories for his department and edit contacts for them, whether the directories are modifiable or not.

Example 3

Mario has permission level 8 or higher. He has full control on all directories (as the administrator) regardless of which department they belong to and of the modifiability of the directories. But Mario cannot edit the contents of the Local and Synchronized directories.

License Activation

Contact Manager Enterprise is licensed <u>per user</u>.

All the feature are active for all the people in the user management list, so you must buy a license which size is at least equal to their number.

Contact Manager provides access to the internal contacts ("colleagues list") for Imagicle Attendant Console. This feature is enabled even if Contact Manager is not licensed or evaluation is expired. You can manage internal contacts through the users' magement section of the web interface. The CuCm directory is also displayed.

Evaluation

Contact Manager will run for 30 days in evaluation mode. During evaluation, Contact Manager features (internal directory, corporate directories, syncronization, click to call, caller ID) will be available for a maximum of 250 users.

How to activate the license

The license can be activated by purchasing the product from Imagicle. You can enable the license in the license page as described in the Application Suite common configuration section of this guide.

To activate the license, follow the standard procedure you can find in the General configuration section.

User Guides

Contact Manager User Guides

Please download the user guide here.

[English](#)

[Italiano](#)

[Deutsch](#)

[Francais](#)

[Espanol](#)

Usage through the Web Interface

Searching directories

To search for contacts log onto the Application Suite web interface and click the "Search contacts" link on the menu.

Basic search

By default the search performed by Speedy is google-style. All the directories which are available to the user are searched. The search includes all the contacts' fields.

Note: the contacts which do not have telephone numbers are excluded from the search.

Advanced search

Advanced search works in boolean AND mode. It will find the contacts that match all the conditions at the same time. The more fields you fill, the less results you will find.

Options (Show) | Simple

WHO ARE YOU LOOKING FOR?	
Last name	
First name	
Email	
Primary Ext number	
Department	

Search

Search options

Click on the options link to limit the results to internal contacts, to change the way the match is made (from the beginning, exactly all the text, a part of the text) and the maximum number of contacts to display.

OPTIONS SEARCH	
Search in	All directories
Search Mode	Begins with
Maximum Results	50

Result list and click to dial

The list of the results shows internal and external contacts in different colours. All the contacts phone numbers are displayed. For internal contacts the user department is also displayed. Clicking on a telephone number makes the user's ip phone begin a call towards that destination.

NOTE: Click to dial is not available to the Application Suite default administrator (the one you created during setup) because it does not have a user profile and it cannot be associated to an IP Phone.

Clicking on the contact name opens the details window. If a field is blank it is not displayed. If the email field is filled, you can click on it to start your email client.

Managing Directories

To create, rename and delete directories log onto the Application Suite web interface and click the "Manage directories" link on the menu.

Click on the icons to the left to edit or delete a directory.

The Local contacts directories cannot be edited (see below). This kind of directory has a little locker on the icon.

Filter and sort the directory list clicking by the controls on the column names header.

To add a new directory click on the "Add New Directory" link on the top of the list.

Fill the directory name and choose the directory type (public, department, or personal). Please remember that personal directories are not available to the application suite main administrator. **Department** directories will be available only to the users that belong to that department. Check the exact spelling of the department, which must match the "Department" field of the users the directory is addressed to.

You can also decide if then directory has to be editable by users or not. If a Public or Department directory has been marked for editing, the users may add, edit and remove its contacts by the web interface, by phone or through Blues Attendant.

Vip directories contain contact which will have higher priority in Queue Manager Enterprise queues.

Synchronized directories periodically reload their contacts from a LDAP server. See below.

Editing Contacts

You can add and edit directory contacts by double-clicking on its row or clicking the View/Edit contacts icon.

Add new contacts by the link on the top of the grid. Delete them by selecting their checkboxes and clicking on the small icon with the "x" or the red icon. Edit a contact double clicking on its row or by clicking the icon to the right.

Sort and Filter

You can sort the contacts by clicking on the columns name. To see only a subset of the contacts, select the field you want to filter and click one of the red letters.

Note: to remove the filter, click "all"

Exporting and Importing Contacts

New contacts may also be added importing them from a CSV (comma-separated values) file.

Click on "Download template" to see what fields the CSV file must contain. New contacts will be added to the existing ones.

Import contacts from csv file

Operation completed successfully	Processed rows: 3 New contacts: 3 Updated contacts: 0 Skipped rows: 0 Show reports...

Integration with other Imagicle Applications

Blue's Attendant and Blue's ONE Enterprise

Click on the Contacts tab to be able to search all the directories you are allowed to see based on your IAS permissions. The integration with Speedy is always active.
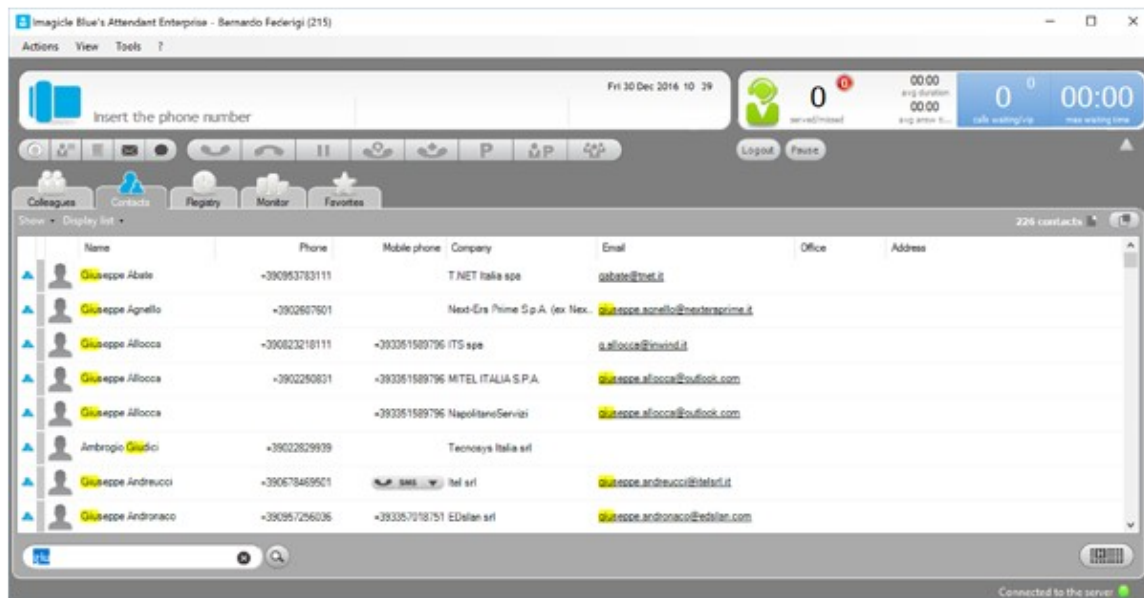
StoneFax

From the Send Fax page, users can click on the **Find contact button** to search their directories.

If a contact has a valid number in the Business Fax field, it can be added to the recipients list. Multiple contacts can be selected at a time.
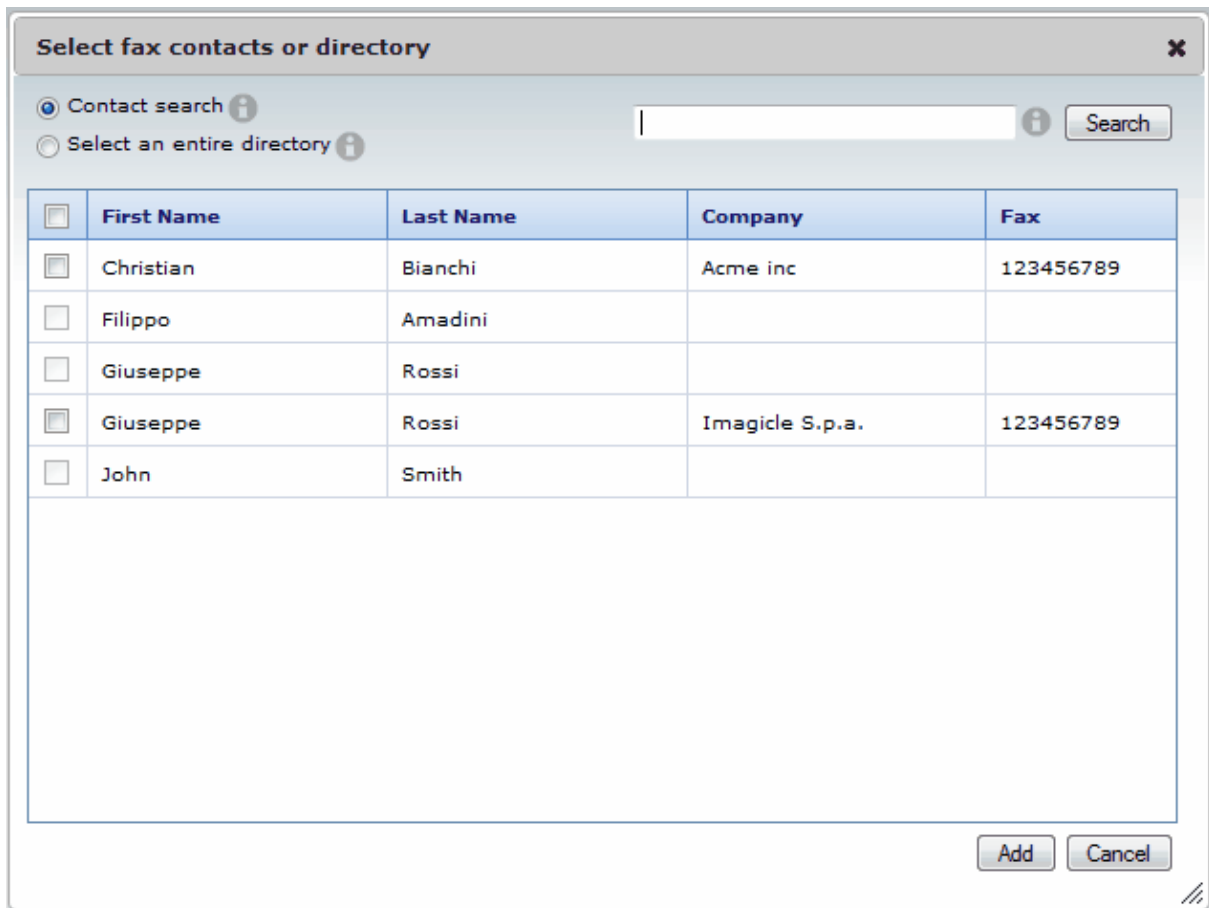
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You can also add a whole directory. Only the contacts with a valid business fax will be added.

Select fax contacts or directory   ✖

○ Contact search ⓘ
● Select an entire directory ⓘ   **Directory** | Imagicle (7)   ▼ |

	FIRST NAME	LAST NAME	COMPANY	Local contacts (73)
☑	Abdul	Azeez	BTC	Imagicle (7)
☑	Andrea	Rivaben	Imagicle	sales (0)
☑	Imagicle	America		Italy suppliers (8)
☑	Imagicle	Middle East		Corporate Mob Speed Dials (21)
☑	Luca	Isola	Imagicle S.p.A.	Personal (2)
☑	أنس	الأصيل	إيماجيكال	Suppliers (22)
☑	ماسيميليانو	بيكي	Imagicle DMCC	Customers (0)
				Resellers (18474)
				+971569415981

                                                        [Add]   [Cancel]

Recipients

Recipient Name*   [   ]

Recipient Fax Number*   [   ] ➕ [Find contact]

List of selected recipients

```
Added by user
    John(55533421455)
Selected from directories
    Directory Suppliers
```
➖

🗑

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FAQ and Solutions

How to enable custom fields

Applies from Application Suite 201x (any version)
to version Application Suite 201x (any version)

Description:

Enable and customize custom fields

Enabling the IAS Custom Fields

Access to Imagicle UC Suite server via RDP and edit file:

C:\Program Files (x86)\StonevoiceAS\Apps\Speedy\Settings**CustomFields.config.xml**

Add the required lines for each internal and/or external custom field to be enabled (see sample below).


```xml
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  ...
  <!-- External phone-type Custom field -->
  <preference key="EnableFieldExternalCustom1"  value="true" />
  <preference key="LabelExternalCustom1"        value="Assistant Number" />
  <preference key="FieldTypeCustom1"            value="Telephone" />

  <!-- External string-type Custom field -->
  <preference key="EnableFieldExternalCustom2"  value="true" />
  <preference key="LabelExternalCustom2"        value="Assistant Name" />
  <preference key="FieldTypeCustom2"            value="String" />
...

  <!-- Internal string-type Custom field -->
  <preference key="EnableFieldInternalCustom1"  value="true" />
  <preference key="LabelInternalCustom1"        value="Manager Name" />
  <preference key="FieldTypeCustom1"            value="String" />

  <!-- Internal phone-type Custom field -->
  <preference key="EnableFieldInternalCustom2"  value="true" />
  <preference key="LabelInternalCustom2"        value="Manager Number" />
  <preference key="FieldTypeCustom2"            value="Telephone" />
  ...

  <!-- Add the following two lines to show enabled custom fields in web portal -->
  <preference key="InternalHiddenColumns" value="Businessphone,Companyname,Custom10,Custom3,Custom4,Custom5,Custom6,
  <preference key="ExternalHiddenColumns" value="Custom10,Custom3,Custom4,Custom5,Custom6,Custom7,Custom8,Custom9,Hor
  ...
</configuration>
```


Save and close the file
Restart CTI service from this menu item: Attendant Console â   Manage Service

Note: You can have the same custom field enabled for Internal (UC Suite users) and External (Contact Manager) contacts, providing they share <u>same field type</u> (both String or Telephone).

"Telephone" custom field type is associated to a phone number that can be dialed by Attendant Console and IP Phones.

How to enable and display custom fields in Attendant Console

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Internal custom: "Colleagues" tab, by checking relevant custom field from "Show" pull-down menu

External custom: "Contacts" tab, by checking relevant custom field from "Show" pull-down menu

How to enable and display custom fields in IP Phones

Edit file: C:\Program Files (x86)\StonevoiceAS\Apps\Speedy\Settings**SpeedyPhoneService.config.xml**
â   Add the following lines between "configuration" statements:

```
<preference key="Speedy.contacts.DisplayPhones" value="Custom1" />
<preference key="SearchFormFields.field.label.Custom.GetFrom" value="External" />
```

Save and close file

Please remember that "Telephone" type custom fields are displayed in the list of contact's associated phone numbers and they can selected to trigger an outgoing calls. "String" type custom fields are displayed while selecting "Details" softkey.

Edit the label name for <u>Internal</u> custom fields in UC Suite's user management web portal (optional)

Edit file: C:\Program Files (x86)\StonevoiceAS\Locale**EN\users.dat.asp**
"EN" is the language folder in use. You can change data for other languages, too: IT, FR, ES, DE, AR
Pls. change below lines as required.

```
strUsersField_user_Custom1          = "Manager name"
strUsersField_user_Custom2          = "Manager number"
strUsersField_user_Custom3          = "Label_name_custom_field_3"
strUsersField_user_Custom4          = "Label_name_custom_field_4"
strUsersField_user_Custom5          = "Label_name_custom_field_5"
strUsersField_user_Custom6          = "Label_name_custom_field_6"
strUsersField_user_Custom7          = "Label_name_custom_field_7"
strUsersField_user_Custom8          = "Label_name_custom_field_8"
strUsersField_user_Custom9          = "Label_name_custom_field_9"
strUsersField_user_Custom10         = "Label_name_custom_field_10"
```

Save and close file
See below a screenshot from user's data, with new custom labels:

Speedy			
Published directory number		Disable caller lookup on phone	☐
Manager name	Donald Lee	Manager number	5557890665
Custom3		Custom4	
Custom5		Custom6	
Custom7		Custom8	
Custom9		Custom10	
List of additional departments (e.g.:Sales;Marketing;Board)			

Please remember that above labels change is lost after an Imagicle release update. You must edit **users.dat.asp** again, to restore custom labels.

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Wrong name and visibility for Contact Manager local directory

Applies to

Imagicle Application Suite 2017.Summer.2 or 2017.Summer.3 - installed from scratch

Description

An installation from scratch of 2017.Summer.2 or 2017.Summer.3 will have a pre-defined Contact Manager configuration that:

- changes the name of the local directory to "Contatti Locali"
- assigns the local contacts directory to department "Department Contacts"

Cause

The configuration file <StonevoiceAS>\Apps\Speedy\Settings\Speedy.Configuration.Global.config.xml contains wrong pre-defined values, instead an empty config.

Solution

1. Edit file <StonevoiceAS>\Apps\Speedy\Settings\Speedy.Configuration.Global.config.xml" and remove the following preference keys:
   - "directory.internalsdefaultdirname"
   - "directory.LocalDirectorySpecialDepartment"
   - "directory.ExcludeThisUsernameFromLocalDirectories"

2. Edit file <StonevoiceAS>\Apps\Speedy\Server\System\Speedy.ini" and delete the following keys from section [Settings]:
   - internalsdefaultdirname
   - LocalDirectorySpecialDepartment
   - ExcludeThisUsernameFromLocalDirectories

3. Update directories content, following these steps:
   - Login to the IAS web portal as administrator and go to Contact Manager, Manage Service web page
   - Locate the "Internal contacts settings" section and change the radio button value. Click Save. This will start the local contacts update procedure, that may take some seconds..
   - Reload the page until the radio button becomes enabled (the local contacts update completed)
   - Change again the radio button value, back to the original value. Click Save.

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The Contact Manager lookup doesn't work - Troubleshooting basics

Applies to:

Application Suite

Description:

Troubleshooting XML service in Contact Manager

Solution:

Contact Manager Directory Lookup - Caller ID Service

Please double-check the Contact Manager configuration in the system guide.

<u>Cisco PBX Configuration</u>

It can be that theDirectories are available on the IP Phone when pressing the Directory button,but the Caller ID popup is not displayed.

When the Application Suiteconfiguration is not correct, no error is displayed on the IP Phone but thepopup is not displayed.

These are the most common problems:

License expired

This can be easilychecked through the "Licenses" web page.

Some Imagicle Services are stopped

Please check in the Windows Service Manager thatthe following services are running (start | Run | services.msc):

"ImagicleService Host", "Imagicle AXL service", "Imagicle Phone Control"

No IAS user can be associated to the IP Phone

Please check that in IAS such user exists, andthat his/her properties which are used to associate the IP phone are correctlyset (primary extension, MAC address, Pbx username). Please verify the deviceassociation in the IAS diagnostic page (Main | Support |PBX Devices:Details). From this pageyou can also test the popup through a button.
A message should be displayed on the associated IP device.

The phone IP address is not available in the IAS database

Please check the device IP address through the IAS diagnostic page.
If it is missing, please check that AXL is correctly configured (and doublecheck the password)

<u>Enabling AXL</u>

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The AXL service must be running on the CUCM node configured on the IAS (On CUCM9.1: CiscoUnified Serviceability --> Tools --> Service Activation --> Cisco AXLWeb Service).
You can restart such service on the CuCM through Cisco Unified Serviceability.

The IP Phone cannot be controller by the IAS through TAPI

Please check the flag on the IAS diagnostic webpage in the"Detected by TAPI" column. You could also look for the device and line in the Windows TAPI snap-in (running "tapimgmt.msc"). If the device is not listed there, you need to associate theIP phone to the ImagicleCTI application user in CUCM.
Another helpful tool is "Phone.exe", located in <StonevoiceAS install dir>\Troubleshooting

Failed IP Phone authorization

Please execute a test from the IAS diagnosticpage (see above). If the "authorization error" message is displayed in the webpage, please check the "URL authentication" on the IP phone and set it on theCuCM in the IP Phone properties (or in the Enterprise Parameters) like this:

http://[APP_SUITE_IP]/fw/authenticate.asp

Calling number is not matched

This can have several causes.

a) The calling number is not listed in anydirectory available to the IAS user associated to the phone. It can be listedin a directory which is owned by another user or associated to a specificdepartment. Check that the contact is available to the user searching for itthrough the directories button on the IP phone.

b) Number mismatch because of the IncomingPrefix
If the voice gateway or the PBX adds a '0' (o another prefix) before the callingnumber, that prefix must also be specified in the IAS (Administration | SystemParameters | Numbering Plan Settings) as Incoming Prefix.

WARNING: some CuCMconfigurations cause the calling number to be displayed on the IP Phone to bedifferent to the one received by Contact Manager in the TAPI signaling. Please check thetrue number through the Call History of the IP phone, which, usually, is thesame number seen through TAPI.

Other information can be gatherer enabling debuglogs in Speed, placing a test call and looking in this file:varlogApplicationSuite.Core.ServiceSpeedy.log.txt
for a line similar to:

DEBUG { 32}[LookupAgent] FormatDetailsOfCallerNumber(user=nome_utente,CLI=034567890123):Search returned no contact in 52 ms.

This tells the user associated to the Ip device,to the calling number received by Contact Manager (CLI), and to the number of matches inthe directories.

When the call arrives, the Display name has already been set by the PBX inthe signaling

In this case, by design, Contact Manager does not send thepopup to the phone. You can force the popup to be sent anyway through a hiddenparameter. Contact Manager Caller ID service does not rely on the calling number length(as the Imagicle Attendant Console does).

The popup http message is too long

The maximum body size for the message supportedby Cisco IP Phones is 512 bytes. This case can be verified through Contact Manager logsand it is triggered when you add too many custom fields to the information tobe displayed or if a First Name/Last Name is too long. In this case you have todisable some additional filed or to shorten the contact data.

The free online CSS cleaner tool helps you to organize style for websites.

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Configure Cisco XML Service in HTTPS

Applies to:

Imagicle UC Suite for Cisco UC, all versions

Description:

This article details how to configure a Cisco XML to use HTTPS toward Imagicle UC Suite.
This can be used for different UC Suite application: Phone Lock, Contact Manager Lookup and/or SmartNumbers, Call Recording announcement.

How-to:

Export the certificate from the UC Suite server

Follow procedure explained in Configure Cisco ECC Curri in HTTPS

Import the certificate into CUCM

Follow the same steps explained in Configure Cisco ECC Curri in HTTPS but choose "**Phone-trust**" as Certificate purpose.

Configure XML service

Note to use the FQDN (and not the IP or other) of the IAS host as defined in its certificate in the "Service URL".

After this configuration you can test -for example- the Phone Lock service making a call from a locked phone and checking that ECC is working like shown in "Phone Lock" | "Call History" page in the UC Suite:

Estos MetaDirectory configurations backup / migration

Applies to:

Estos MetaDirectory - Any version

Description:

Procedure to backup or migrate Estos MetaDirectory configurations

How-to:

1. Stop the main service: from windows administrative tools -> Services -> Stop "**ESTOS MetaDirectory**"
2. Copy/Backup "**database**" and "**config**" folders from Estos installation directory
3. Install Estos MetaDirectory on the new server
4. Stop Estos service on the new server
5. Replace "database" and "config" folders with ones saved at point 2
6. Start Estos service on the new server
7. Activate Estos license on the new server

How to change search results ranking

Applies to:

Imagicle Contact Manager Enterprise, Summer 2018 release and above.

Description:

Change the priority of returned search results

How-to:

1. Access to Imagicle server via RDP and edit file:
2. C:\Program Files (x86)\StonevoiceAS\Apps\Speedy\Server\system**Speedy.defaults**
3. Find this line:
   ```
   PrioritySearchFieldSet=LastName,FirstName,CompanyName,Email,Department,PostalAddress,Prima
   ```
4. Copy above line
5. Close Speedy.default file
6. Edit **Speedy.ini** file, available in the same folder
7. Add copied line at the bottom of this file, and change field priority according to specific needs
8. Save file

Forbidden PrioritySearchFieldSet values

Once above configuration has been applied, please test it from web portal. If duplicated fields has been entered (E.g. *LastName,FirstName,LastName*), the following error appears:
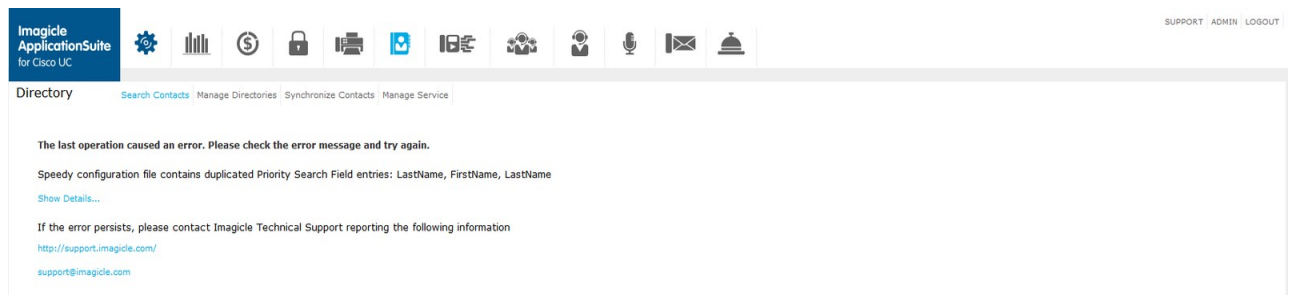
If a wrong field name is entered (E.g. *LastName,FirstNam*), the following error appears:

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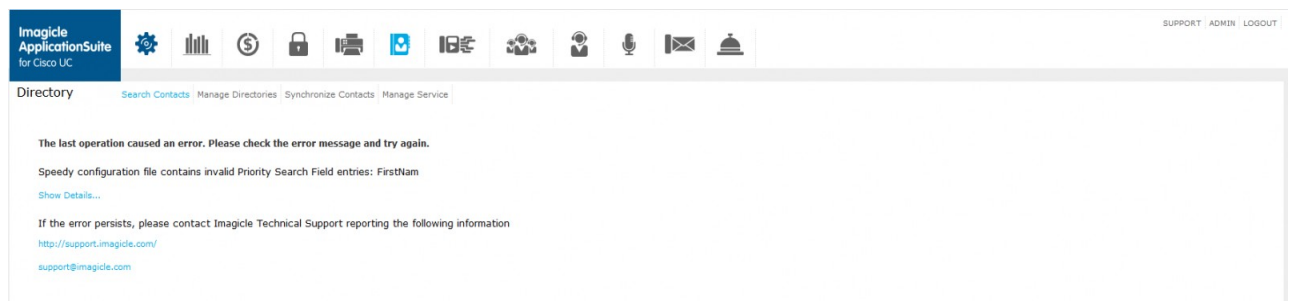
Swap First/Last name in the XML Contact Manager service

to version Application Suite 201x (any version)

Applies to:

- Contact Manager XML Phone service

Description:

- To swap First/Last name in the XML service of the phone. So names will displayed as Firstname Lastname instead of Lastname Firstname

How-to:

- Edit the file StonevoiceAS\Apps\Speedy\Settings\SpeedyPhoneservice.config.xml
- Add the below line:

<configuration>

   <preference key="Speedy.contacts.ShowFirstNameBeforeLastName" value="true" />

</configuration>

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Display Department instead of Company in XML phone service search

to version Application Suite 201x (any version)

Applies to:

- Contact Manager Phone XML service

Description:

- By default, the XML service allows you to search (in Advanced) by "First name", "Last name" or "Company". This tutorial will allow you to change company to department

How-to:

- Edit the file StonevoiceAS\Apps\Speedy\Settings\SpeedyPhoneservice.config.xml
- Add the below line:

```
<preference key="SearchFormFields.field.nornal.CompanyName" value="false" />
```

```
<preference key="SearchFormFields.field.nornal.Department" value="true" />
```

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How to show searched contacts in format first name - last name also using web search

Applies from Application Suite 2019.1.1

Applies to:

Application Suite Winter '19 or newer

Description:

Now is possible to show searched contacts in format first name - last name also using web search

How-to:

Connect to Imagicle Application Suite Server and look at the folder:
<StonevoiceAS>\Apps\Speedy\Settings\

Open file Speedy.config.xml and look for parameter "WebSearch.ShowFirstNameBeforeLastName".
Change its value to true.

Save and exit text editor.

How to License Estos Metadirectory 4.0
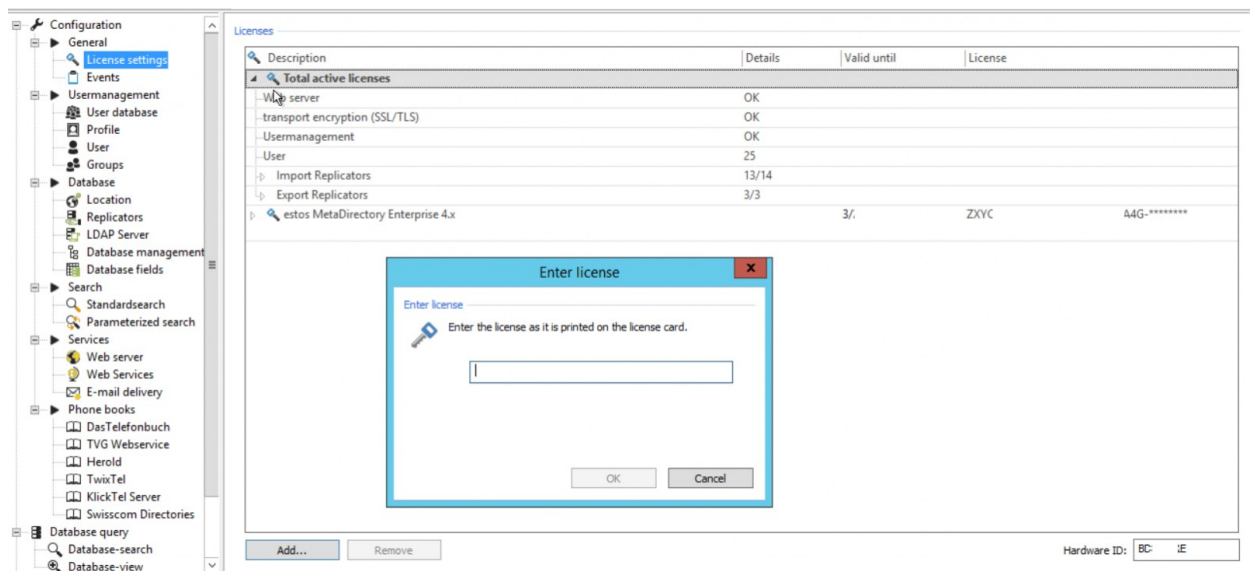
Applies to:

Estos Metadirectory 4.0

Description:

How to License Estos Metadirectory 4.0

How-to:

1. Open Estos Metadirectory software and click on Configuration | General | License Settings
   Click 'Add', type in your license code then click 'OK'.

2. Check your license code and click on "Bind license..."

3. Now you can choose whether to activate online or offline:

4. Click on "Link license online..." if the server is able to reach the Internet, then wait for the end of the procedure
5. If the server is not able to reach the Internet, you can proceed with the offline activation
   click on "Show details"
   On a PC that is connected to the Internet, go to www.estos.de/licensing and use the reported information
   or
   On a device (ie. a mobile phone) that is connected to the Internet, use the QR code.... as shown:

# How to solve SQL Full-Text Search service failure on a IAS joined in a domain

Applies to:

Imagicle ApplicationSuite rel. 2020.Spring.1 and above

Description:

While installing a new SQL Server 2017 Express instance from scratch or while just adding Full-Text Search feature on an existing instance, a specific SQL service called "Full-Text Filter Daemon Launcher" is stopped by domain policies, because it is using a virtual Windows account and the "log on as a service" policy does not allow the service to startup.

Above issue is causing a SQL Server error -123 during the installation and setup is aborted. See below samples:
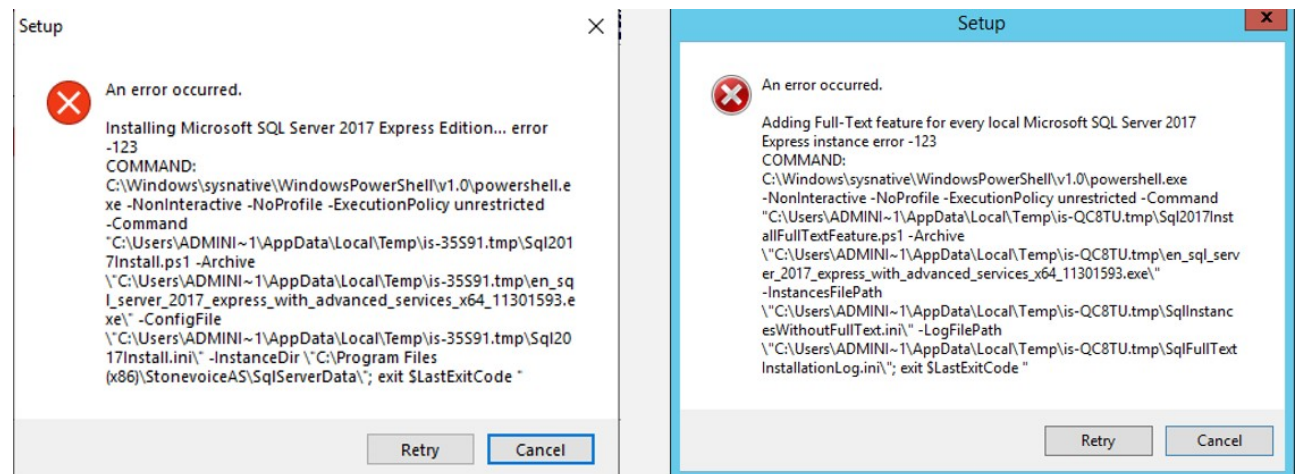
Two available solutions:

1. Ask the domain administrator to change the domain policy in order to grant "log on as a service" privilege to the virtual account used for running run the Full-Text service (usually *NT Service\MSSQLFDLauncher$IMAGICLE2017*). This is surely the preferred and easiest solution.
2. Change the account used to run the Full-Text service to **Network Service** built-in account, the same used to run the SQL Server service (if installed by the ApplicationSuite). This should fix the issue since the network service account should meet the minimum privilege requirements . The account can be changed via the SQL Server Configuration Manager, included with any SQL Server installation. From this tool, select the "SQL Server Services" menu on the left, then right-click on the target service (e.g. SQL Full-Text Filter Daemon Launcher (IMAGICLE2017), select "Properties" and set *Network Service* account from the "Log on" tab. See below:
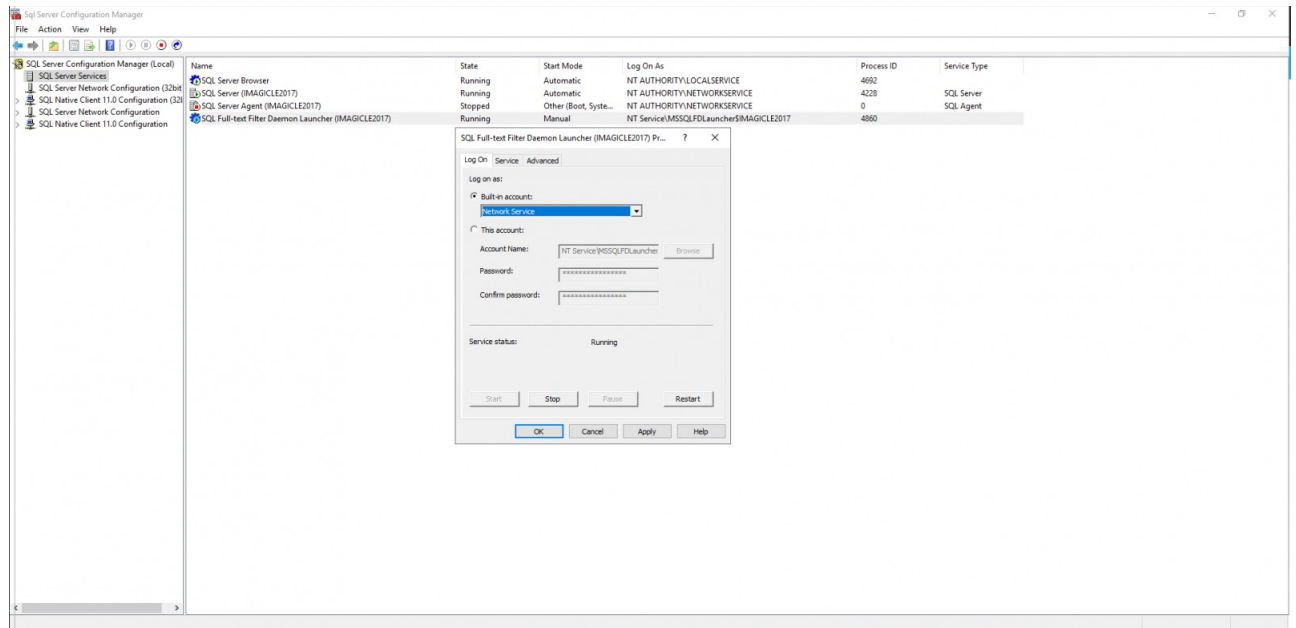
Video

Product Overview

Advanced directories, Caller ID and Click to Call.

Speedy Enterprise is the solution that centralizes and synchronizes company directories, providing fast searches, click to call and caller ID on phone, web, mobile and Cisco Jabber.
In this video, you will get a brief overview of the product.

Caller ID

Know who's calling.

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, in Cisco Jabber and in Imagicle Attendant.

Personal and public contacts.

You decide what you want to share.

Learn how to can create and manage public directories, or directories reserved for individual groups/departments, or directories with private contacts that only you can see on your IP phone.

Find a contact

Find a contact in a flash.

With a single search, Imagicle Directory finds the right contact with up-to-date info in company, public and personal directories.

Sync directory with a CSV file through Estos Meta

How to sync a Speedy directory with a CSV file through Meta Connector ver. 5.0.

Learn how to synchronize Speedy contacts with an external source through Meta Connector ver. 5.0. In this example, we'll import them from a CSV file Categoria

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Import contacts from a CSV file into a directory

Faster, Smarter, Easier.

Learn how to create a CSV file with your contacts and load them to a Speedy directory.