Contacts

Contacts are callers to the system, for example customers, support benificiaries or participants of a conference. Contacts are used to identify callers to the system. If the system is setup correspondingly, contacts are created for every call to the system.

Choose **System Settings - Contacts** in the main menu, to view the table of existing contacts.

Using the option **Export CSV** you can export the table to a CSV file which you can then download.

You can use **Import** to import contacts from a file. The file must be in CSV format.

When exporting and importing user data via CSV files, the following conventions apply:

- Records in a file are separated by CR + LF (Windows line ending).
- CR + LF within a record is not allowed.
- Fields within records are separated by semicolons.
- The field descriptions (see table) are not provided.
- A record contains all fields in the defined order (see following table).
- Missing fields are not allowed.
- Field contents can be supplied enclosed by inverted commas. In this case the inverted commas are not considered part of the data.
- The detection of duplicates is performed using the value provided in the *CheckDuplicateFields* field. Duplicates are overwritten if you specify the option *Overwrite Duplicates*.

The following fields are specified per record:

Field	Contents
"Contact"	Fixed text: "Contact" This identifies the type of the record.
ContactClassName	The name of the contact class for this record. Leave empty, if no contact class is to be specified.
CheckDuplicateFields	What fields are to be used to identify a duplicate. The fields are separated by | (a | symbol should be provided at the start and end of this field too). Example:|Name|FirstName|Company|
Title	The title of the contact
Name	Name
FirstName	First Name
Company	Company
Position	The contact's position in the company
Street1	Street
Street2	Additional Street
PostCode	Post Code
City	City

Country	Country
Tel1	The telephone number in E.164 format
Fax	The fax number in E.164 format
EMail1	The email address.
ListsName	If the name of a list is provided here, then the contact is additionally added to the specified list.

Use **New** in the toolbar to create a new contact. Entries can be changed by selecting **Edit** in the **Action** column. Provide the following information:

Master Data

ID	Internal ID of the record in the database.
Contact Class	The optional selection of a [Contact Class](#)
Title	The title of the contact
First Name	First Name
Name	Name
Company	Company
Position	The contact's position in the company
Street	Street
Street 2	Additional Street
Post Code	Post Code
City	City
Country	The state or county
Customer Number	Customer Number or ID

Communications

Telephone 1	The first number of the contact
Telephone 2	The second number of the contact
Telephone 3	The thirdnumber of the contact
Telephone 4	The fourth number of the contact
Telephone 5	The fifth number of the contact
Fax	The contact's fax number

Email 1	The contact's email address.

Image

In **Edit** mode, you can upload an image for the contact. This image is, for example, shown when the contact participates in a telephone conference.

Automatic Contact Import

It is possible to configure an automatic file import for contacts.

Configuration

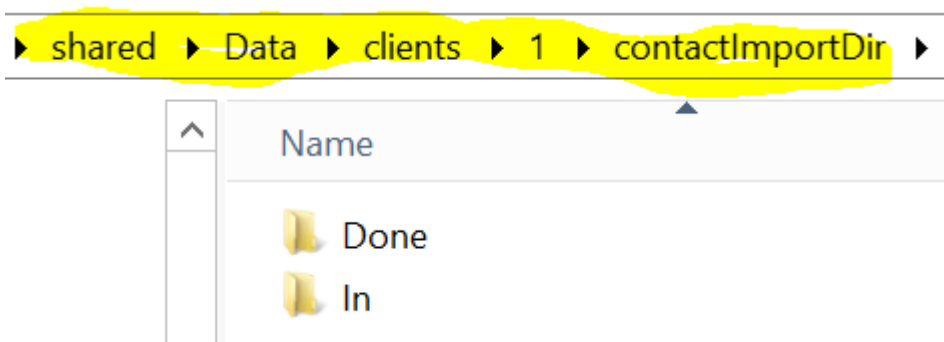The following parameter must be set, as **sysadmin**.

The Parameter **Portal.Contacts.Import.Directory.Active** must be set to 1.

Note: the webservers must be restarted when this parameter is set.

A directory is created in the Share Directory - Data/Clients/Client-ID/ (as JTEL User) - **contactImportDir.** The following subdirectories are then created:

- In
- Done

In **Client Master Data**, the Import Directory is specified.

Note: the name must correspond to the directory created above.

Edit Client "jtel GmbH"

Update time

Agent Home :   10000 ms ▼ (System value 10000ms)

The update time for Agent Home.

Supervisor :   5000 ms ▼ (System value 5000ms)

The update time for Supervisor.

Foreign System

Display Name :

URL 1 Display Name :

URL 1 :

URL 2 Display Name :

URL 2 :

Contacts

Import Directory Contacts :   contactImportDir

Save and Close   Save   Refresh   Cancel

Import

A file, in the correct format (UTF-8), is placed in the **In** directory.

If the import is successful, the file is moved to **Done,** and the contacts are visible in the system.