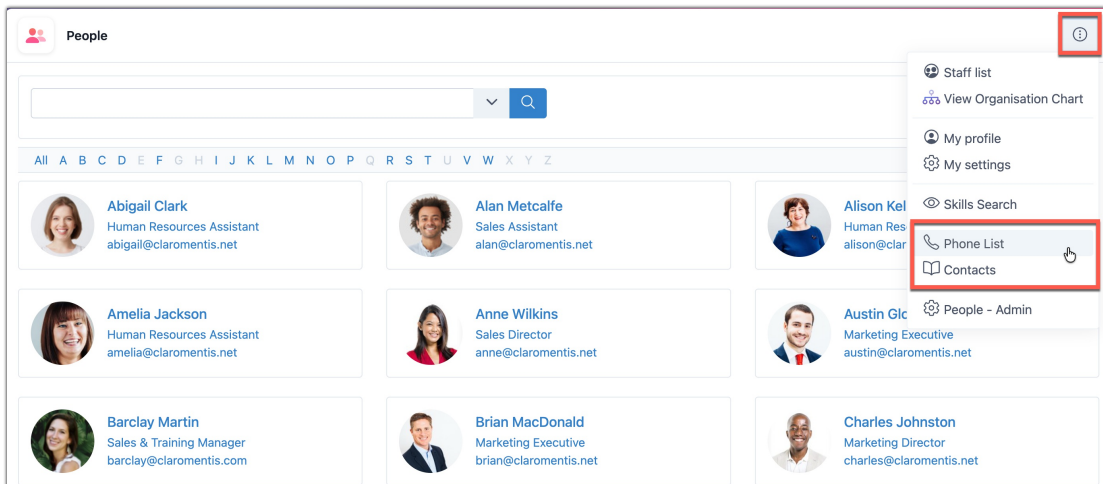




People: Phone List and Contacts

Both the Phone List and Contacts areas are available under the 3-dot menu on the top right when in the People application.



Phone List

The idea here is to allow any user to export users' contact information, should this be needed, e.g for record keeping or to assist an event taking place, like a conference.

If any fields have a special view permission on them, they will only appear here to users with appropriate rights to see them.

People > Phone List

Keywords

All words

Role

All

Extranet area

All

Group

Company

Results per page

10

With subgroups

City

CSV delimiter

Semicolon (;)

Comma (,)

Fields

First name

Surname

Mobile

Company

Filter

Reset

Print

CSV

First name	Surname	Mobile	Company
Jennifer	Langdon	07675389076	Claromentis Ltd
Pippa	Fraser	07554278690	Claromentis Ltd
Vanessa	Wright	07887320111	Claromentis Ltd

Contacts

Any user can create personal contacts that are only for them to view and act as a phone book. These could be external suppliers, contractors or clients. Ensure the 'Owner' permission has been used to keep the contact hidden from everyone else.

People > Contacts > Edit contact information

Title

Mr

First name

John

Surname

Test

Contact type

Supplier

Email

test@test.com

Do not check for unique email addresses

Company

Paper Ltd

Job Title

Senior Manager

Work location

London

Start typing to add...

Browse

Remove

Owner

View

Edit

View effective permissions...

Apply permissions

Any user can also create contacts that can be shared with other users/roles/groups to either view only or allow them to edit. e.g 'All registered' or specific Roles or Groups

People > Contacts > Edit contact information

Title

Mr

First name

John

Surname

Test

Contact type

Supplier

Email

test@test.com

Do not check for unique email addresses

Company

Paper Ltd

Job Title

Senior Manager

Start typing to add...

Browse

Remove

All registered

View

Edit

View effective permissions...

Apply permissions

People administrators can review the contacts shared with everyone to check they are appropriate, edit them or remove them as needed.

People > Contacts

Import contacts

Add a new contact

Keywords

All words

Everywhere

☐ My personal contacts

☒ Other's contacts

CSV delimiter

☐ Semicolon (;)

☒ Comma (,)

CSV

Filter Contacts

Reset

Title	First name	Surname	Job Title	Company	Land line	Email	Mobile	Contact type
Mr	John	Test	Senior Manager	Paper Ltd		test@test.com		Supplier

Contacts can also be imported from CSV or vCard if your company has this already created:

People > Contacts

Import contacts

Add a new contact

Keywords

All words

Everywhere

☒ My personal contacts

☐ Other's contacts

CSV delimiter

☐ Semicolon (;)

☒ Comma (,)

CSV

Filter Contacts

Reset

Title	First name	Surname	Job Title	Company	Land line	Email	Mobile	Contact type
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People > Contacts > Import Contacts

Import vCard (.vcf)

Choose file

No file chosen

Upload

Import CSV (.csv)

Choose file

No file chosen

Upload