



Manage Phone Books

On the Phone Books tab of the Cisco Finesse administration console, you can create and manage global and team phone books and phone book contacts. Global phone books are available to all agents; team phone books are available to agents in that specific team.

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Phone Books and Contacts

Finesse supports the following number of phone books:

- 10 global phone books
- 300 team phone books

The system supports a total of 50,000 contacts. The total number of contacts per agent across all phone books is limited to 1500.

Use the Manage Phone Books gadget to view, add, edit, or delete phone books and phone book contacts. Click the Name or Assign To headers to sort the phone books in ascending or descending order. Click the last Name, First Name, Number, or Note headers to sort the contacts in ascending or descending order.

Manage Phone Books

List of Phone Books

Name	Assign To
Marketing Team 1	Teams
Marketing Team 2	Teams
Sales Asia	All Users
Sales East	All Users
Sales Europe	All Users
Sales West	All Users

New Edit Delete Refresh

List of Contacts for Marketing Team 1

Last Name	First Name	Number	Note
Adams	Everette	1-555-1414	VP Sales East
Adams	Kleth	1-555-2998	Product Owner
Adams	Alfredo	1-555-1342	Mailman
Adams	Dusty	1-555-0344	Truck Driver
Adams	Corey	1-555-1514	QA Engineer

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The following table describes the fields on the Manage Phone Books gadget.

Field	Explanation
Name	The name of the phone book. The name must be unique, and can be a maximum length of 64 alphanumeric characters.
Assign To	Indicates if the phone book is global (All Users) or team (Teams).
Last Name	The last name of a contact. The last name can be a maximum length of 128 characters. This field is optional.
First Name	The first name of a contact. The first name can be a maximum length of 128 characters. This field is optional.
Number	The phone number for the contact. The phone number can be 1-32 characters long and cannot be blank.
Note	Optional text that describes the contact. The note can be a maximum length of 128 characters.

Actions on the Manage Phone Books gadget:

- **New:** Add a new phone book or contact
- **Edit:** Edit an existing phone book or contact
- **Delete:** Delete a phone book or contact
- **Refresh:** Reload the list of phone books or contacts from the server
- **Import:** Import a list of contacts to the phone book
- **Export:** Export a list of contacts from the phone book

Add Phone Book

Procedure

- Step 1** In the Manage Phone Books gadget, click **New**.
The Manage Phone Books area appears.

The screenshot shows the 'Manage Phone Books' interface. At the top, there's a title bar 'Manage Phone Books'. Below it is a section titled 'List of Phone Books' containing a table:

Name	Assign To
Marketing Team 1	Teams
Marketing Team 2	Teams
Sales Asia	All Users
Sales East	All Users
Sales Europe	All Users
Sales West	All Users

Below the table is a 'New Phone Book' section with a 'Name' input field, an 'Assign To' dropdown menu (currently set to 'All Users'), and 'Save' and 'Cancel' buttons.

- Step 2** In the Name box, enter a name for the phone book.
- Note** Phone book names can be a maximum length of 64 characters.
- Step 3** In the Assign To box drop-down list, select **All Users** if the phone book is global or **Teams** if the phone book is available to specified teams.
- Step 4** Click **Save**.

Edit Phone Book

Procedure

- Step 1** In the Manage Phone Books gadget, select the phone book you want to edit.
- Step 2** Click **Edit**.
The Edit Phone Books area appears.

The screenshot shows a window titled "Manage Phone Books". Inside, there is a section titled "List of Phone Books" containing a table with two columns: "Name" and "Assign To". The table lists several phone books, with "Marketing Team 1" and "Sales West" highlighted in yellow. Below the table is an "Edit Phone Book" section with a "Name" text field containing "Marketing Team 1" and an "Assign To" dropdown menu currently set to "Teams". At the bottom of the edit section are "Save" and "Cancel" buttons.

Name	Assign To
Marketing Team 1	Teams
Marketing Team 2	Teams
Sales Asia	All Users
Sales East	All Users
Sales Europe	All Users
Sales West	All Users

Edit Phone Book

Name: Assign To:

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Step 3 In the Name field, enter the new name for the phone book. If you want to change who can access the phone book, in the Assign To field drop-down list, choose **All Users** or **Teams**.

Step 4 Click **Save**.

If you change the Assign To field from Teams to All Users, a message appears that asks you to confirm the change. Click **Yes** to confirm.

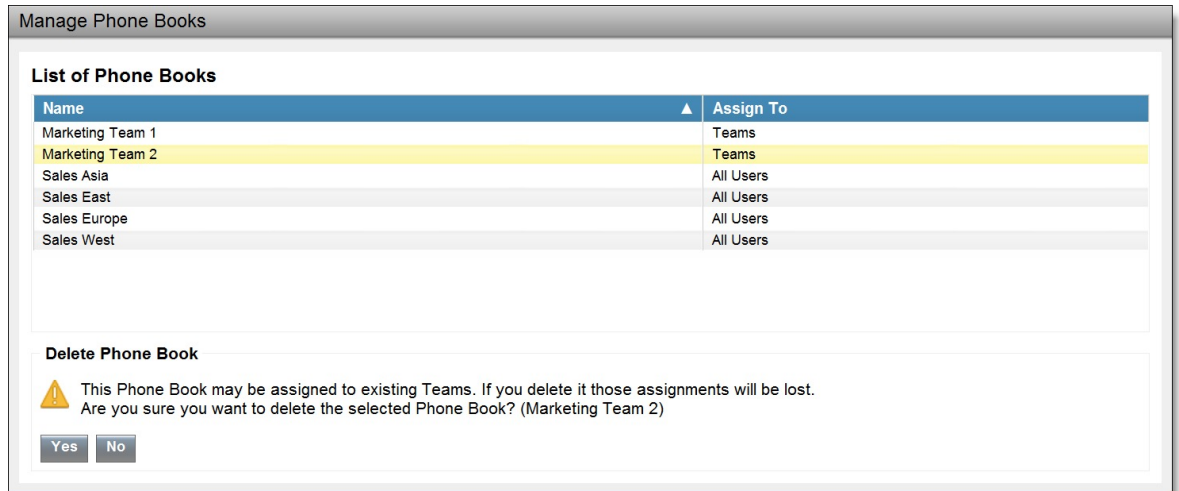
Delete Phone Book

Procedure

Step 1 In the Manage Phone Books gadget, select the phone book that you want to delete.

Step 2 Click **Delete**.

A question appears asking you to confirm that you want to delete the selected phone book.



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Step 3 Click **Yes** to confirm the deletion of the selected phone book.

Import Contacts

The Import function allows you to replace all the contacts in a phone book with a new list of contacts, or to populate a new phone book with contacts.

The import list must be in the specified comma separated values (CSV) format, and can contain a maximum of 1500 contacts. Import lists that contain more than 1500 contacts are rejected with an error message.

The CSV file contains the fields described in the following table.

Field	Max Length	Can Be Blank?	Permitted Characters
First Name	128	Yes	Note The CSV file that contains the contacts to import must use Latin encoding.
Last Name	128	Yes	
Phone Number	32	No	
Notes	128	Yes	

The following is an example of a phone book CSV file:

```
"First Name","Last Name","Phone Number","Notes"
"Amanda","Cohen","6511234",""
"Nicholas","Knight","612-555-1228","Sales"
"Natalie","Lambert","952-555-9876","Benefits"
"Joseph","Stonetree","651-555-7612","Manager"
```

A phone book CSV file must conform to this format and include the headers in the first line. During import, the file is scanned for illegal characters. If any are found, they are replaced with question marks.



Note Exported CSV files always show each field enclosed in double quotes, as in the preceding example, to ensure that any commas or double quotes that are part of the actual filed data are not mistaken for field delimiters. If your data does not include these characters, you can omit the double quotes in files you prepare for importing.

Procedure

Step 1 In the Manage Phone Books gadget, select the phone book into which you want to import a list of contacts.

Step 2 Click **Import**.

The Import Contacts area appears.

Last Name	First Name	Number	Note
Adams	Murray	1-555-1286	Lawyer
Adams	Jan	1-555-0108	Policeman
Adams	Dwayne	1-555-2453	Sales represenative
Adams	Allen	1-555-0201	VP Marketing
Adams	Olin	1-555-0110	Rock Star
Adams	Raphael	1-555-0413	Product Owner
Adams	Gavin	1-555-0014	Butcher
Adams	Landon	1-555-2862	Butcher
Adams	Felton	1-555-0416	Mailman
Adams	Jaime	1-555-1799	Product Owner

Import Contacts

All existing Contacts in the Marketing Team 1 Phone Book will be replaced with the file you choose:

Contacts File

Step 3 Click **Browse** and navigate to the location of the CSV file containing the contacts you want to import.

Note The CSV file must use Latin encoding.

Step 4 Click **OK**.

Export Contacts

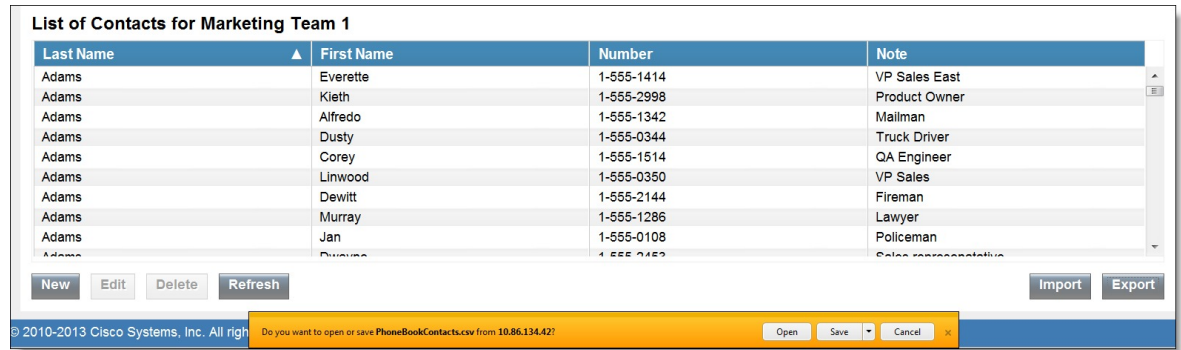
The Export function allows you to extract a list of contacts from an existing phone book. The exported list is saved in CSV format.

Procedure

Step 1 In the Manage Phone Books gadget, select the phone book that contains the contacts you want to export.

Step 2 Click **Export**.

A message is displayed asking if you want to open or save the file.



Note The default name for an export file is PhoneBookContacts.csv.

Step 3 Click **Open** to open the CSV file in Excel, or click the **Save** drop-down list and choose **Save**, **Save as**, or **Save and open**, as desired.

Step 4 A message appears that gives you the option to view the downloaded file, open the folder into which the download was saved, view the Internet Explorer View Downloads window, or dismiss the message without viewing the file.

Related Topics

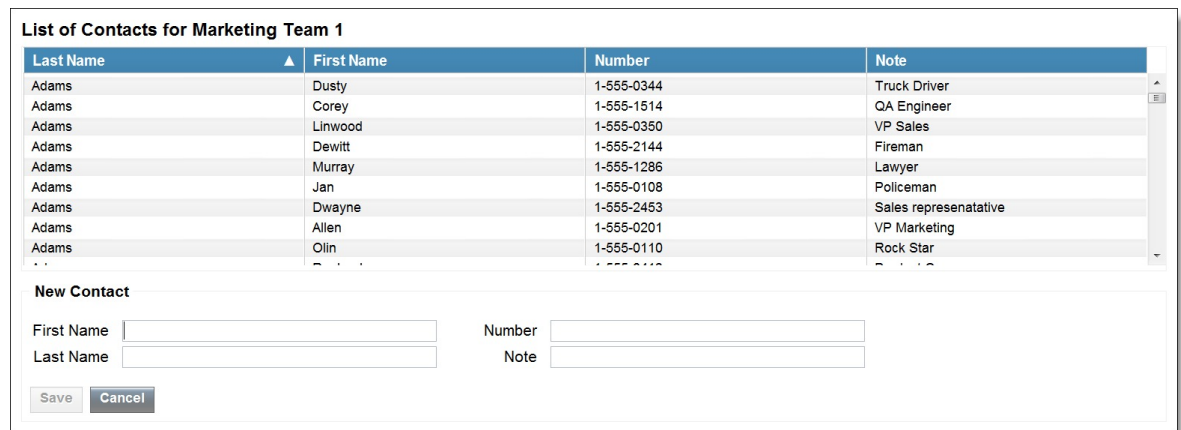
[Import Contacts](#), on page 5

Add Contact

Procedure

Step 1 In the Manage Phone Books gadget, select the phone book to which you want to add a contact. The List of Contacts for <phone book name> area appears.

Step 2 Click **New**. The New Contact area appears.



- Step 3** Complete the fields. The First Name, Last Name, and Note fields are optional and have a maximum length of 128 characters. The Number field is required and has a maximum length of 32 characters.
- Step 4** Click **Save**.

Edit Contact

Procedure

- Step 1** In the Manage Phone Books gadget, select the phone book that contains the contact you want to edit. The List of Contacts for <phone book name> area appears.
- Step 2** Select the contact you want to edit.
- Step 3** Click **Edit**. The Edit Contact area appears.

List of Contacts for Marketing Team 1

Last Name	First Name	Number	Note
Adams	Everette	1-555-1414	VP Sales East
Adams	Kieth	1-555-2998	Product Owner
Adams	Alfredo	1-555-1342	Mailman
Adams	Dusty	1-555-0344	Truck Driver
Adams	Corey	1-555-1514	QA Engineer
Adams	Linwood	1-555-0350	VP Sales
Adams	Dewitt	1-555-2144	Fireman
Adams	Murray	1-555-1286	Lawyer
Adams	Jan	1-555-0108	Policeman
Adams	Dwayne	1-555-2452	Sales representative

Edit Contact

First Name Number

Last Name Note

- Step 4** Edit the fields that you want to change. The First Name, Last Name, and Note fields are optional and have a maximum length of 128 characters. The Number field is required and has a maximum length of 32 characters.
- Step 5** Click **Save**.

Delete Contact

Procedure

- Step 1** In the Manage Phone Books gadget, select the phone book that contains the contact you want to delete. The List of Contacts for <phone book name> area appears.

Step 2 Select the contact that you want to delete.


Step 3 Click **Delete**.

A question appears asking you to confirm that you want to delete the selected contact.

List of Contacts for Marketing Team 1

Last Name ▲	First Name	Number	Note
Adams	Dusty	1-555-0344	Truck Driver
Adams	Corey	1-555-1514	QA Engineer
Adams	Linwood	1-555-0350	VP Sales
Adams	Dewitt	1-555-2144	Fireman
Adams	Murray	1-555-1286	Lawyer
Adams	Jan	1-555-0108	Policeman
Adams	Dwayne	1-555-2453	Sales representative
Adams	Allen	1-555-0201	VP Marketing
Adams	Olin	1-555-0110	Rock Star

Delete Contact

 Are you sure you want to delete the selected Contact? (Corey Adams - 1-555-1514)

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Step 4 Click **Yes** to confirm the deletion of the selected contact.

