Manage Phone Books

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Phone Books and Contacts

Finesse supports the following number of phone books:

- 10 global phone books with release 15.0(1). When you install Finesse ES202511, Finesse supports up to 25 global phone books
- 300 team phone books

The system supports a total of 50,000 contacts with release 15.0(1). When you install Finesse ES202511, the system supports a total of 100,000 contacts. The total number of contacts per agent across all phone books is limited to 6000

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.

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

Field	Explanation
Name	The name of the phone book. It must be unique, and can be a maximum 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 of 128 characters. This field is optional.

Field	Explanation
First Name	The first name of a contact. The first name can be a maximum 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 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**.

Step 2 In the **Name** field, enter a name for the phone book.

Note
Phone book names can be a maximum of 64 characters.

Step 3 From the **Assign To** drop-down, 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**.

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** drop-down, choose **All Users** or **Teams**.

Step 4 Click **Save**.

If you change the Assign To field from Teams to All Users, click **Yes** to confirm the change.

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**.

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 6000 contacts. Import lists that contain more than 6000 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	Alphanumeric characters **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 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**.

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**.

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**.

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.

Step 5 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.

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**.

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**.

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

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