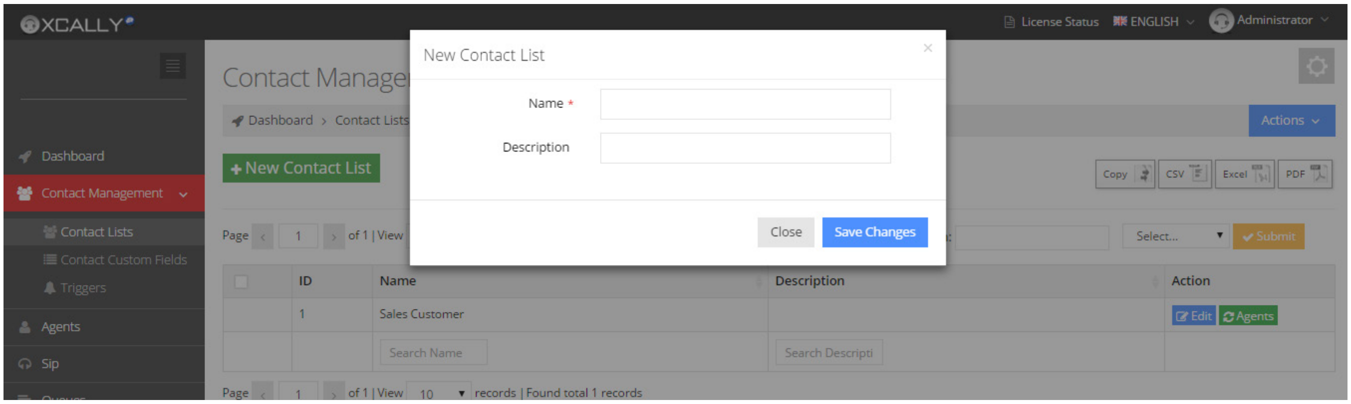
CM Contact Lists

In this section you can manage your list of contacts (create, edit, delete and associate it to some Agents).

Create a list

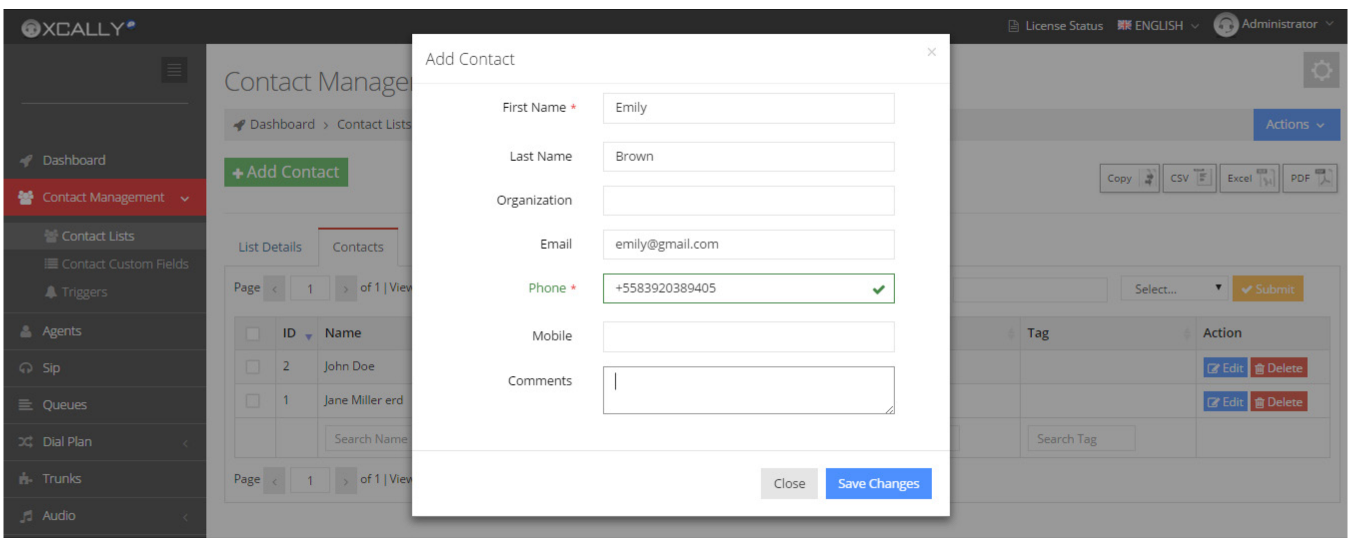
To **create a list**, simply click on the New Contact List button and provide a Name and a Description for it.



Now let's **add the contacts into your list**.

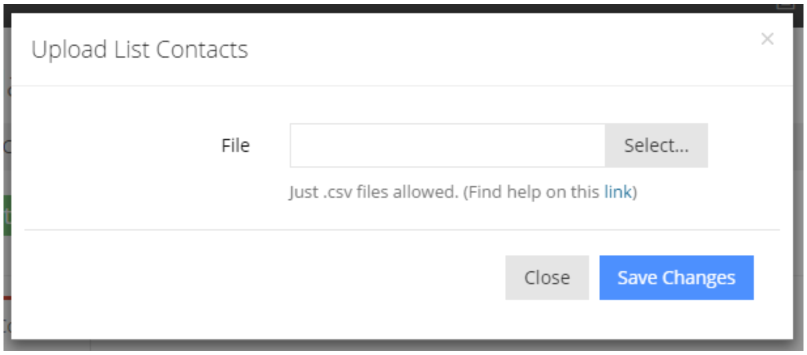
Add contacts to a list

To add a **single contact**:
- Click on the Edit button;
- Click on the Add contact button and fill in the form with the information of the contact:

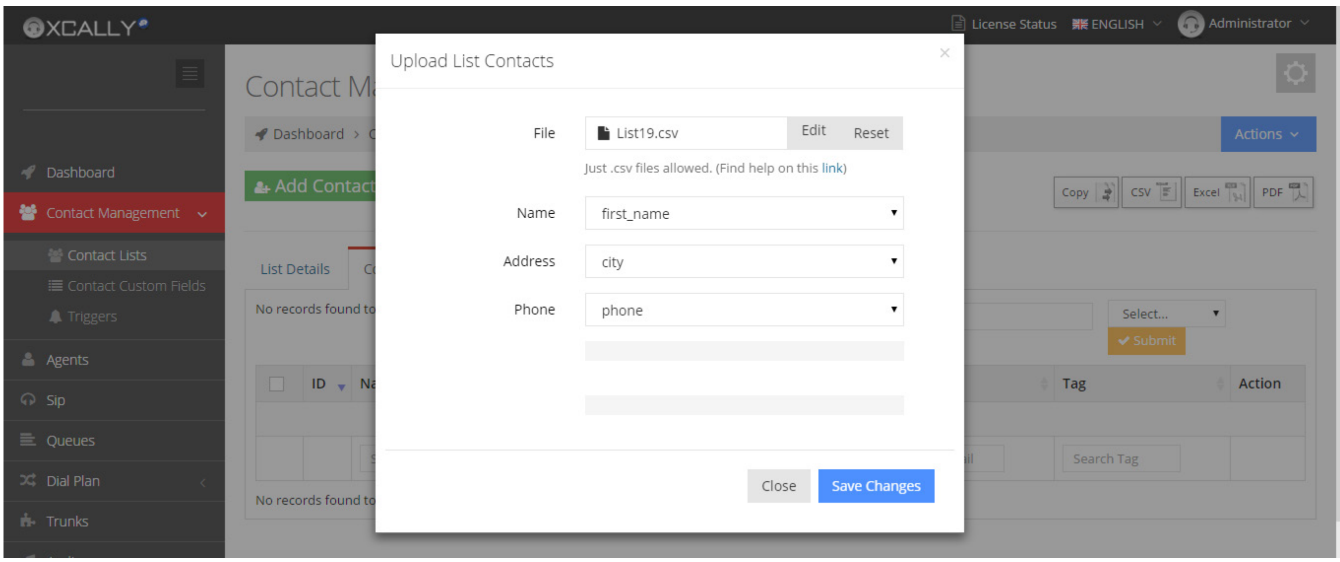


- Click on Save Changes

To add **multiple contacts** click on Upload List Contacts and select your .csv file contacts list.

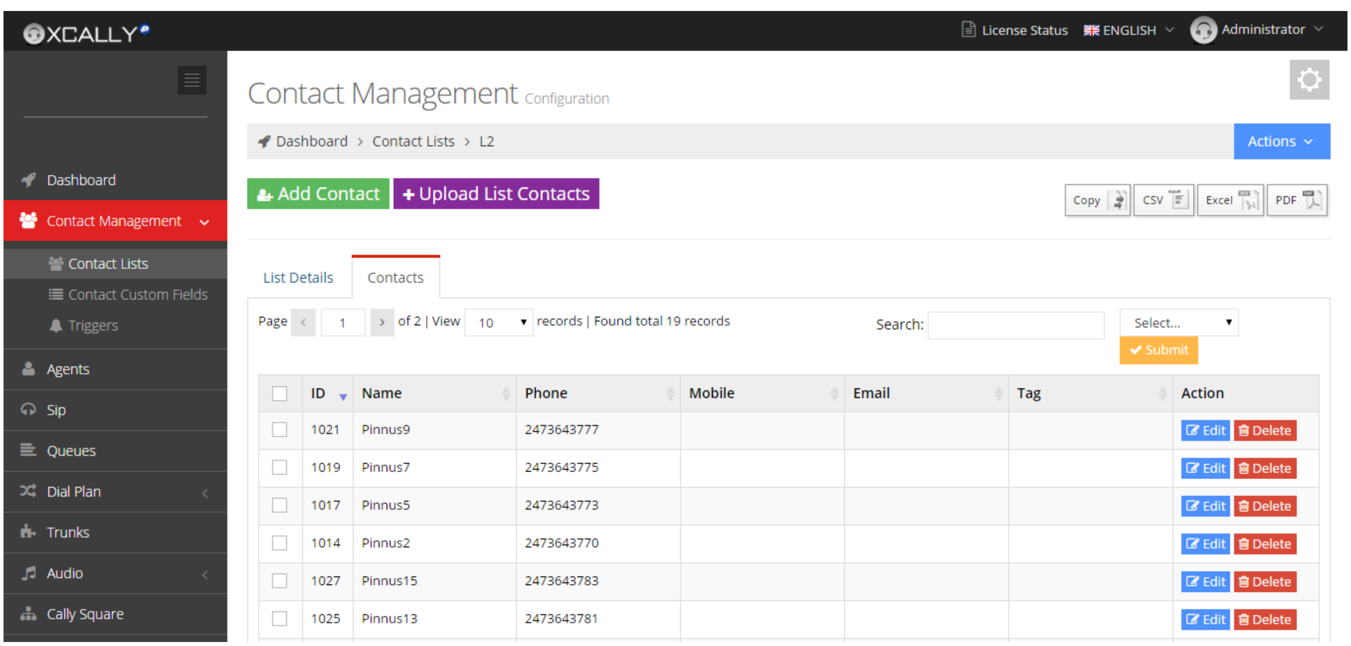


Complete the *Data Binding*, defining which columns of your file represent respectively the Name, the Address and the Phone Number (i.e. as shown in the image Phone -> phone) and click on Save Changes. Wait for the uploading of the list and, when it is completed, click on Close.



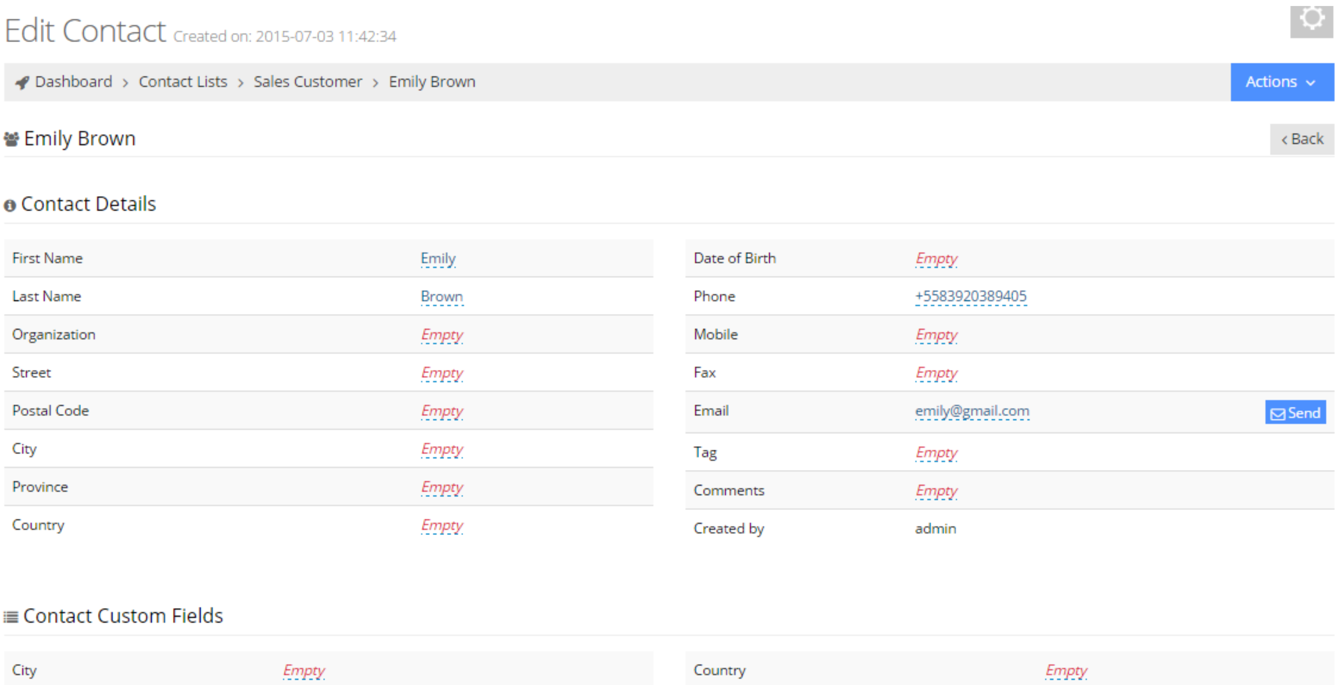
You will see the created single contact or the contacts imported from your list in the Contacts table.

You can edit or delete the contacts by clicking on the Edit and Delete buttons.

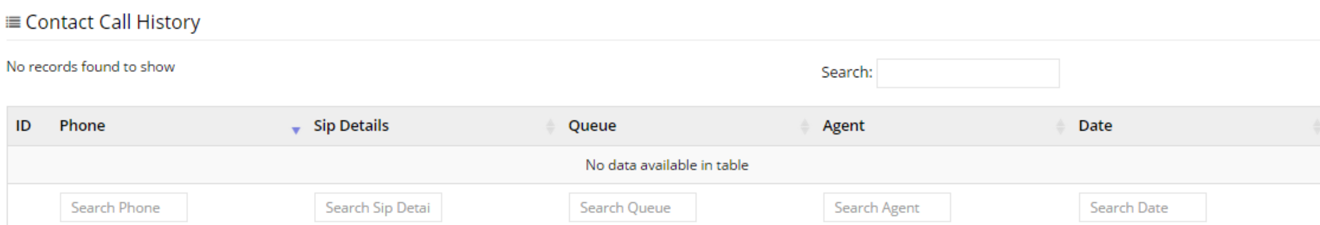


Edit a Contact

When you edit a contact you will see a page, like in the image below, containing the default **Contact Details**, the **Custom Fields** (that you can create in the Contact Custom Fields section) and the **Contact Call History**.
Click on the data or on Empty to edit or insert the relative customer information.

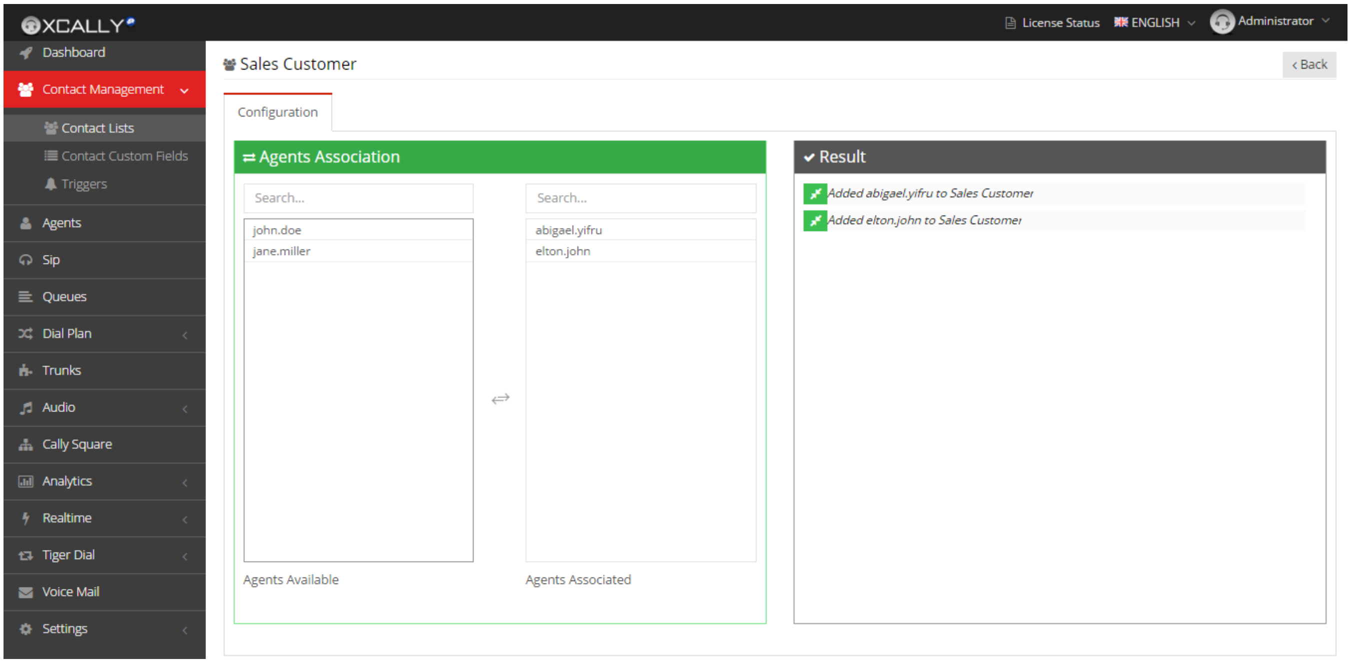


In the Contact Call History you can see the list of the Customer Calls and the information about SIP details, the Queue, the Agent and the Date.



Agent Permissions

To **specify which agents can access to the list**, through their xCALLY web interface, click on the *Agents button*.
Click on the agents that you want to associate to the list (select them from the Agents Available column).
If the association has been made correctly, you will see the positive feedback on the Association Results section, on the right of the screen, and the name of the selected Agent in the Associated Agents list, as shown in the image below.



To delete an association simply click on the name of the Agent of interest in the Associated Agents column.
To let the Agent see the list in his Dashboard you have to select, in his Agent Settings, the Module Contacts Management.