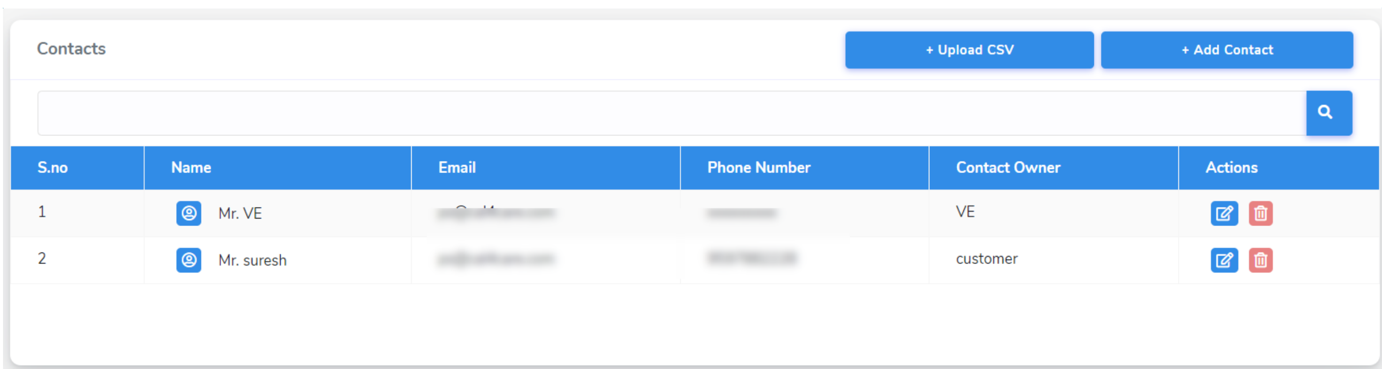
Help manual for Contacts

Contacts are significant for a successful business. It is very important that you store all the Contacts and all the information about the Contacts, so that they can be managed competently. Omnichannel provides you with specialized features to efficiently store all your Contacts and their information.

How to add new Contacts?

- Go to **Manage** menu and click on **Contacts** submenu.
- Click on **+Add Contact.**



In the page that opens enter the information for:

- **Contact Owner:** Contact owner's name.
- **Lead Source:** Lead source's name.
- **Full Name:** Full name of the contact.
- **Last Name:** Last name of the contact.
- **Account Name:** Account name of the contact.
- **Title:** Title of the contact.
- **Email:** Email-id of the contact.
- **Department:** The department to which the contact is associated with.
- **Responsible Department:** The responsible department's name.
- **Activity Phone:** Phone number of the activity to which the contact is associated with.
- **Home Phone:** Home phone number of the contact.
- **Office Phone:** Office phone number of the contact.

- **Fax:** Fax number of the contact.
- **Mobile:** Mobile phone number of the contact.
- **Date of Birth:** Date of Birth of the contact.
- **Assistant:** Name of the assistant of the contact.
- **Assistant Phone:** Phone number of the assistant.
- **Reports To:** The authority to whom he reports to.
- **Email Opt out:** This option is to either select for Email or choose not to select.
- **Skype:** The skype ID of the contact.
- **Secondary Email:** Secondary email of the contact.
- **Twitter:** Twitter ID of the contact.
- **Reporting to:** The reporting authority's name.

Address Information

- **Mailing Street:** The name of the street of the contact.
- **Other Street:** The name of the other street of the contact.
- **Mailing City:** The name of the city of the contact.
- **Other City:** The name of the other city of the contact.
- **Mailing Province:** The name of the mailing province of the contact.
- **Other Province:** The name of the other province of the contact.
- **Mailing Postal Code:** The postal code of the contact.
- **Other Postal Code:** The other postal code of the contact.
- **Mailing Country:** The mailing country of the contact.
- **Other Country:** The other country of the contact.

Social Media Information

- **WhatsApp Number:** The WhatsApp number of the contact.
- **LINE:** The information about the contact's LINE account.
- **Facebook-url:** The information about the contact's Facebook Url.
- **WeChat:** The information about the contact's WeChat account.
- **Viber:** The information about the contact's Viber account.

- **Telegram:** The information about the contact's Telegram account.
- **Instagram Url:** The information about the contact's Instagram Url.
- **LinkedIn:** The information about the contact's LinkedIn account.

Note Information

Notes: The Agent/Admin can create and save any detail or information or make notes regarding the contact.

Wrap-up Codes:

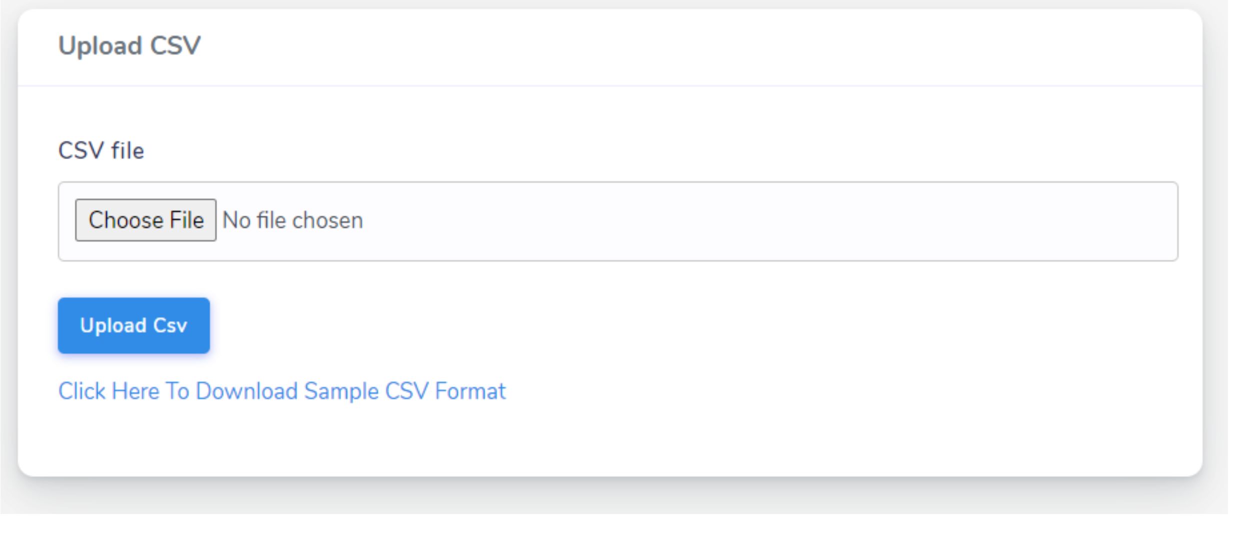
- The agent can select the appropriate aux codes such as DND, Interested, etc., after the call with the customer so as to continue further in the future.

After entering all the above information, click on **Add New Contact.**

The contact will be saved and will get displayed in the **Contact List.**

Upload Contact with CSV file.

Click on "upload CSV' for upload multiple contact with file. It makes your work easy.



How to Edit/Update Contact?

- You should click on the **Edit/Update** icon.
- Then enter all the changes and click **Save Changes.**

The changes will get updated and will be displayed on **Contact List.**

"+" Button:

When a call lands in, the wrap-up code automatically pops-out. It will help the Agent to select the appropriate wrap-up code to continue the interaction with the customer in the future.

The Agent can also make any notes related to the call in **Notes.**

Then click **Save Changes.**

The changes will get updated.

How to Delete a Contact?

To delete a Contact, click on the **Delete** icon.

The confirmation message will pop-out.

Click on **"Yes, delete it!"** and then for the other confirmation **"OK".**

The Contact will get deleted and will not be displayed anymore in the **Contact List.**