



## CubiContactModule

Cubi Contact Module shows latest Cubi UI enhancement

Phase-Implementation

Updated Nov 12, 2012 by [rockys...@gmail.com](#)

## Introduction

Cubi Contact module provides the common functions for users to manage their contacts. This module also demonstrate many advanced UI enhancements made in latest Cubi release.

### What users can do in Contact module

- View all contacts
  - View contacts by list
  - View contacts as cards
  - View contacts as photos
  - View contacts by types
  - View contacts by companies
  - View contacts in map
- Search contacts
- Filter contacts by name, type and groups
- Create, Edit, Delete contacts
- Share contacts in group or everyone
- Upload pictures of a contact
- Specify locations of a contact
- Attach files for a contact
- See change history of a contact data
- Link other contacts to a contact
- Import contacts from csv, xls, google ...
- Manage contact types
  - Set color of a type
  - Set custom fields of a type

### Advanced features can be used in other modules

- Sharing and permission control
- Attachments
- Locations
- Pictures
- Types and custom fields
- A new UI element called FormElement that can embed a form in another non-grid form

The following sections will demonstrate Contact module by screenshots.

## View Contacts

### View contacts by list

My Account Help Logout

Administration Contacts

Cubi System > Contacts > Contacts > View Contacts
Switch to Default Group System, Admin

**Contacts** Index

- Contacts**
- View Contacts
- New Contact
- Contact Map
- Import Contacts
- Contact Types

**Contact View Mode**

- ☒ Phone Book
- ☐ Contact Cards
- ☐ Photo Grid
- ☐ Group by Type
- ☐ Group by Company

**Contact Phone Book**

Telephone directory (also called a telephone book and phone book) is a listing of telephone.

Add Edit Copy Delete Export All Data All Types

All 0-9 ABC DEF GHI JKL MNO PQR STU VWX YZ Other

|  | Share | ID | Contact Name   | Phone        | Mobile         | Ordering | Type            |
|--|-------|----|----------------|--------------|----------------|----------|-----------------|
|  |       | 8  | William, Smith | 650-320-1983 | 650-320-1023   | 25       | Existing Client |
|  |       | 5  | Jixian, Wang   | 323-2392031  |                | 30       | Colleague       |
|  |       | 7  | Dong Nan       |              | +159 0110 2096 | 50       | Colleague       |
|  |       | 1  | System, Admin  |              |                | 100      | Colleague       |

Go to Page 1 Show Rows 10 1 of 1

## View contacts as cards

**Contacts** Index

- Contacts**
- View Contacts
- New Contact
- Contact Map
- Import Contacts
- Contact Types

**Contact View Mode**

- ☐ Phone Book
- ☒ Contact Cards
- ☐ Photo Grid
- ☐ Group by Type
- ☐ Group by Company

**Contact Cards**

You can view your contacts in Cards view.

Add Edit Copy Delete Export All Data All Types

All 0-9 ABC DEF GHI JKL MNO PQR STU VWX YZ Other

**William,**  
Director  
wsmith@netgear.com  
650-320-1983  
650-320-1023  
Existing [more...](#)

**Jixian,**  
jx@gmail.com  
323-2392031  
Colleague [more...](#)

**Dong Nan**  
Manager  
nancy@openbiz.me  
+159 0110 2096  
Colleague [more...](#)

**System,**  
Colleague [more...](#)

Go to Page 1 Show Rows 9 1 of 1

## View contacts as photos

Contacts

Index

Contacts

View Contacts

New Contact

Contact Map

Import Contacts

Contact Types

Contact View Mode

Phone Book

Contact Cards

Photo Grid

Group by Type

Group by Company

Photo Grid

This is a Photo Grid view of your contacts that will help you quick check your contacts as picture wall.

Add

Edit

Copy

Delete

Export

All Data

All Types

Go

All

0~9

ABC

DEF

GHI

JKL

MNO

PQR

STU

VWX

YZ

Other

William, Smith

Existing Client

Jixian, Wang

Colleague

Dong Nan

Colleague

System, Admin

Colleague

Go to Page

1

Show Rows

12

1 of 1

## View contacts by types

Contacts

Index

Contacts

View Contacts

New Contact

Contact Map

Import Contacts

Contact Types

Contact View Mode

Phone Book

Contact Cards

Photo Grid

Group by Type

Group by Company

Group by Contact Type

The view displays your contacts as types you had defined

Add

Edit

Copy

Delete

Export

All Data

All Types

Go

All

0~9

ABC

DEF

GHI

JKL

MNO

PQR

STU

VWX

YZ

Other

| Share                  | ID | Contact Name | Company        | Phone        | Mobile         | Type                         |
|------------------------|----|--------------|----------------|--------------|----------------|------------------------------|
| Group: Existing Client |    |              |                |              |                |                              |
|                        |    | 8            | William, Smith | Netgear Inc. | 650-320-1983   | 650-320-1023 Existing Client |
| Group: Colleague       |    |              |                |              |                |                              |
|                        |    | 5            | Jixian, Wang   | Openbiz      | 323-2392031    | Colleague                    |
|                        |    | 7            | Dong Nan       | Openbiz LLC  | +159 0110 2096 | Colleague                    |
|                        |    | 1            | System, Admin  | N/A          |                | Colleague                    |

Go to Page

1

Show Rows

5

1 of 1

## View contacts by companies

Contacts

Index

Contacts

View Contacts

New Contact

Contact Map

Import Contacts

Contact Types

Contact View Mode

Phone Book

Contact Cards

Photo Grid

Group by Type

Group by Company

Group by Company

The view displays your contacts in terms of company

Add

Edit

Copy

Delete

Export

All Data

All Types

Go

All

0~9

ABC

DEF

GHI

JKL

MNO

PQR

STU

VWX

YZ

Other

| Share               | ID | Contact Name | Company        | Department   | Position  | Phone    | Type                         |
|---------------------|----|--------------|----------------|--------------|-----------|----------|------------------------------|
| Group: Netgear Inc. |    |              |                |              |           |          |                              |
|                     |    | 8            | William, Smith | Netgear Inc. | Marketing | Director | 650-320-1983 Existing Client |
| Group: Openbiz LLC  |    |              |                |              |           |          |                              |
|                     |    | 5            | Jixian, Wang   | Openbiz LLC  |           |          | 323-2392031 Colleague        |
|                     |    | 7            | Dong Nan       | Openbiz LLC  | Marketing | Manager  | Colleague                    |
| Group: N/A          |    |              |                |              |           |          |                              |
|                     |    | 1            | System, Admin  | N/A          |           |          | Colleague                    |

Go to Page

1

Show Rows

5

1 of 1

## View contacts in map



## Contact Map

This view will show your contacts location in the map.

Export All Data All Types  Go

All 0~9 ABC DEF GHI JKL MNO PQR STU VWX YZ Other

Map Satellite

**William, Smith** ×  
Existing Client  
**Mountain View Office**  
Sales division office  
[More](#)

## Manage a Contact

### Contact detail page

#### General contact information

## 8 Contact Profile



# William, Smith

Existing Client



**Firstname** William  
**Lastname** Smith  
**Company** Netgear Inc.  
**Department** Marketing  
**Position** Director

### Phone

**Phone** 650-320-1983 **Mobile** 650-320-1023  
**Fax**

### Address

**Country** USA **Province** CA  
**City** Mountain View **Street** 1020 Castro St  
**Zipcode** 94072

### Extra contact information

#### Online Contact

**Email** wsmith@netgear.com **Webpage**  
**QQ** **ICQ**  
**Skype** williamsmith **Yahoo**

#### Extra Information

**Locations** 0 **Picture** 0 **Attachment** 0 **ChangeLog** 5 **Miscellaneous**

-- No related location records --

Add Location

#### Related Data

**Contacts** 0

| Share | ID | Display Name | Company | Phone | Mobile | Type | Action |
|-------|----|--------------|---------|-------|--------|------|--------|
|-------|----|--------------|---------|-------|--------|------|--------|

+ Add | Pick Contacts

Share | + Add | Edit | Copy | Delete | Back

### Manage pictures of a contact

## Extra Information

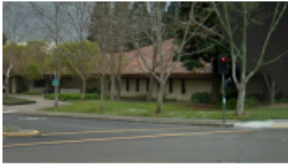
Locations 2

Picture 1

Attachment 1

ChangeLog 5

Miscellaneous



### [Mountain View Office](#)


office\_view.png ( 238.33 KB )

Uploaded on: 2012-11-09 15:14:47

[Edit](#) [Delete](#)

Add Picture

## Upload a new picture



### New Picture

Please select files from your computer to upload pictures.

Title

Files

**SELECT FILES**

## Specify locations of a contact

## Extra Information

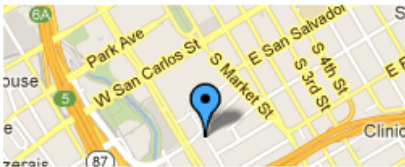
Locations 2

Picture 1

Attachment 1

ChangeLog 5

Miscellaneous



### [San Jose Office](#)


510 S Almaden Ave San Jose, C

Marketing division office

Updated on: 2012-11-09 15:08:19

[Edit](#) [Delete](#)

## Edit a location



## Location Detail

You can edit title and description for a uploaded location.

Title

Address

Description

Marketing division office

### Attach files for a contact

#### Extra Information

Locations 2

Picture 1

Attachment 1

ChangeLog 5

Miscellaneous




[William Resume](#)

resume\_wsmith.doc ( 54 KB ) Uploaded on: 2012-11-09 15:17:32



[Edit](#) [Delete](#)

### Upload a new file



## New Attachment

Please select files from your computer to upload attachments.

Title

Files

See change history of a contact data

Extra Information





Locations2

Picture1

Attachment1

ChangeLog6

Miscellaneous

| Type  | Change Time  |
|---|--|
|  | 2012-11-09 15:30:09  |
| Fax   | <Empty>  650-320-1024 |
| System, Admin <admin@yourcompany.com>   |  |
|  | 2012-11-09 14:00:08  |
| Ordering  | 30  25                |
| System, Admin <admin@yourcompany.com>   |  |

See contact misc data

Extra Information

Locations2

Picture1

Attachment1

ChangeLog7

Miscellaneous

Miscellaneous

William was hired by Netgear in 2007

Ordering

25

Group Share

Visible

Other Group

Private

Create By

System, Admin <admin@yourcompany.com>

Create Time

2012-11-09 13:56:28

Update By

System, Admin <admin@yourcompany.com>


Update Time


2012-11-09 15:35:09

Link other contacts to a contact

Related Data

Contacts1


| Share   | ID | Display Name | Company     | Phone       | Mobile | Type        | Action            |
|---|----|--------------|-------------|-------------|--------|-------------|-------------------|
|  | 5  | Jixian, Wang | Openbiz ... | 323-2392031 |        | Colleagu... | <div>Remove</div> |

 Add

Pick Contacts

Link from another contact





## Please select a contact

To select a contact, click on a row and click to Select button

Select

Close

All Data


All Types

Go

|  | Share | ID | Contact Name   | Phone        | Mobile         | Email              | Type            |
|--|-------|----|----------------|--------------|----------------|--------------------|-----------------|
|  |       | 8  | William, Smith | 650-320-1983 | 650-320-1023   | wsmith@netgear.com | Existing Client |
|  |       | 5  | Jixian, Wang   | 323-2392031  |                | jx@gmail.com       | Colleague       |
|  |       | 7  | Dong Nan       |              | +159 0110 2096 | nancy@openbiz.me   | Colleague       |

## Share contacts in group or everyone

Click on Share button on contact list or detail page will launch sharing dialog



## Data Sharing

Share your data with your group members or others users.

### William, Smith

Data Type

My Data Record

Data Creator

System, Admin

Owner Group

Default Group

\* Data owner's group name

Data Owner

System, Admin

Owner Perm

Full Control

\* Data permission for owner

Group Perm

Read Only

\* Data permission for owner group's users

Other Perm

Invisible

\* Data permission for other users

Cascade

☐

\* Cascade update referenced my data

Notify User

☐


\* Notify users by email

OK

Cancel

Advanced


Click Advanced button to control access of individual users



## Data Access Control List

You can setup access permission for specified list of users.

Default Group: demo123    Read and Modify    + Add    Delete


|   | User    | Permission      | Create by     | Create Time         |
|---|---------|-----------------|---------------|---------------------|
|  | demo123 | Read and Modify | System, Admin | 2012-11-09 15:45:02 |

Go to Page: 1    Show Rows: 6    ◀ ▶ 1 of 1

OK    Cancel    Basic

## Import Contacts

### Import from csv or spreadsheet



## Contact Grabber

Contact Grabber could help you import your contacts from various email or social network provider

Provider: Microsoft Excel 2003


Excel File:  Browse... \* The file should contain your contact data

Sample Data: [Download Sample Data Template](#)

Next    Skip

### Import from google contacts

In order to connect google to fetch the contacts, please make sure php-ssl extension is enabled on your web server. Please find more details of installing php-ssl at <http://php.net/manual/en/book.openssl.php>



## Contact Grabber

Contact Grabber could help you import your contacts from various email or social network provider

Provider: Google Contacts

Email: rockyswen@gmail.com \* Eg. user@domain.com

Password:  \* It will not be saved on server

Next    Skip



## Select Contact to Import

Below contacts is loaded from specified Contact Provider, Please select contacts to importd.

| Sel                                 | Display Name  | Phone | Mobile | Email                  | Company | Position |
|-------------------------------------|---------------|-------|--------|------------------------|---------|----------|
| <input checked="" type="checkbox"/> | Andrew Chayka |       |        | andrew@project.com     |         |          |
| <input checked="" type="checkbox"/> | neo           |       |        | neo@neo.com.tw         |         |          |
| <input checked="" type="checkbox"/> | liuhao        |       |        | liuhao@discuz.com      |         |          |
| <input checked="" type="checkbox"/> | Reddy Boman   |       |        | redboman@redwaybiz.org |         |          |

Go to Page  Show Rows   1 of 13

## Manage contact types

Contact type allows users to create any type that can be assigned to a contact. The contact module has pre-fill six common types including:

- Colleague
- Potential Client
- Existing Client
- Provider
- Government
- Misc

### Type attributes

Each type can have the following attributes:

- Name.
- Description.
- Color. An unique color which can help users to identify contact easily.
- Group Share. If group share is enabled, the type can be used by other all users in the same group of the type creator.
- Other Group Share. If group share is enabled, the type can be used by other all users in other groups

### Type Custom Fields

Each type can have multiple custom (or called extend) fields. Once the custom fields are defined, they will visible as additional fields of a contact.

### Configure a custom field

A custom field can be different element types:

- InputText
- Listbox. The list of values can be defined as "value1;value2;value3". A default value can be set as one of the list values.
- Textarea
- Dropdownlist.
- Bool
- Date
- Datetime

You can see additional fields appear in the new contact form.

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