



How to Use Guide: Company Address Book

Last updated: 12/29/2010

Overview

Company Address Book allows you to store the name, phone number, and alias of company contacts in a central location, making this information available to company users within My Business Account. In addition, you can assign each contact an alias that will appear on bills, instead of their full name.

Company Address Book			
Search Results			
Alias	Name	Phone Number	Manage Entry
John	John doe	555-555-5678	Edit Delete
Joe	Joe Doe	555-555-0001	Edit Delete
Raja1234	John Dowe	555-555-5555	Edit Delete
jane	jane doe	555-555-1234	Edit Delete

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User Roles with Access to Company Address Book

Users that have been assigned the “Primary Contact”, “Administrator” and “Analyst” User Roles have access to view, add and edit Company Address Book contacts.

How to Upload a Contact List

You can add multiple contacts to Company Address Book, at one time, by uploading a .CSV file to the “Company Address Book” page.

Key points:

- Uploading a contact list may overwrite existing entries.
- You must use a .CSV file when uploading Company Address Book.
- The file must be formatted correctly in order for the upload to be successful.

Formatting the upload file:

Column titles

- Row 1 should be used for the column titles
- Format exactly as described below, using all caps:
 - a. Enter “ALIAS” in Column A of Row 1
 - b. Enter “FIRST NAME” in Column B of Row 1
 - c. Enter “LAST NAME” in Column C of Row 1
 - d. Enter “PHONE#” in Column D of Row 1

	A	B	C	D	E
1	ALIAS	FIRST NAME	LAST NAME	PHONE#	
2	Larry	Larry	Doe	555-555-0003	
3	John	John	Doe	555-555-9999	
4	Joe	Joe	Doe	555-555-5550	
5	Raja123	John	Dowe	555-555-5555	
6	jane	jane	doe	555-555-8888	
7					
8					
9					

For your convenience, you may also download a [Contact List Template](#) <link to .CSV template> with Row 1 already formatted for you.



Column A (Alias)

- Can be letters or numbers only
- Special characters are not allowed. For example: *(asterisk), - (dash), _ (underscore), etc.
- Spaces are not allowed
- Can't exceed ten characters

	A	B	C	D	E
1	ALIAS	FIRST NAME	LAST NAME	PHONE#	
2	Larry	Larry	Doe	555-555-0003	
3	John	John	Doe	555-555-9999	
4	Joe	Joe	Doe	555-555-5550	
5	Raja123	John	Dowe	555-555-5555	
6	jane	jane	doe	555-555-8888	
7					
8					
9					

Columns B & C (First/Last Name)

- Must be letters only
- Special characters are not allowed. For example: *(asterisk), - (dash), _ (underscore), etc.
- Spaces are not allowed
- The system will join the content in the "First Name" and "Last Name" columns with a space in between. The total length of this joined string (including the space) should not exceed twenty characters.

	A	B	C	D	E
1	ALIAS	FIRST NAME	LAST NAME	PHONE#	
2	Larry	Larry	Doe	555-555-0003	
3	John	John	Doe	555-555-9999	
4	Joe	Joe	Doe	555-555-5550	
5	Raja123	John	Dowe	555-555-5555	
6	jane	jane	doe	555-555-8888	
7					
8					
9					

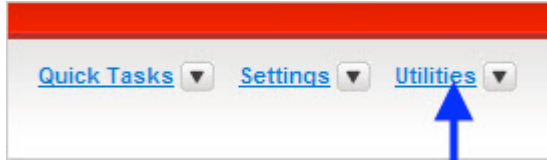
Column D

- Must be numbers only
- Phone numbers must include "-" (hyphens) after the area code and after the prefix: i.e. xxx-xxx-xxxx

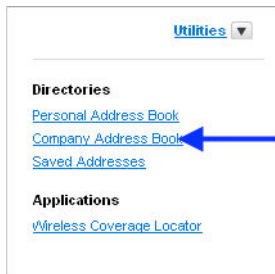
	A	B	C	D	E
1	ALIAS	FIRST NAME	LAST NAME	PHONE#	
2	Larry	Larry	Doe	555-555-0003	
3	John	John	Doe	555-555-9999	
4	Joe	Joe	Doe	555-555-5550	
5	Raja123	John	Dowe	555-555-5555	
6	jane	jane	doe	555-555-8888	
7					
8					
9					

Uploading the file

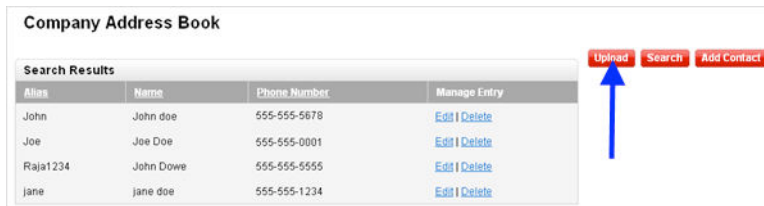
1. Click on the **“Utilities”** dropdown.



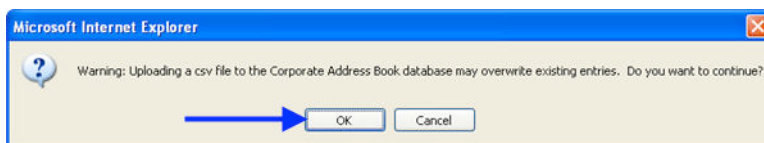
2. Go to **“Company Address Book”**.



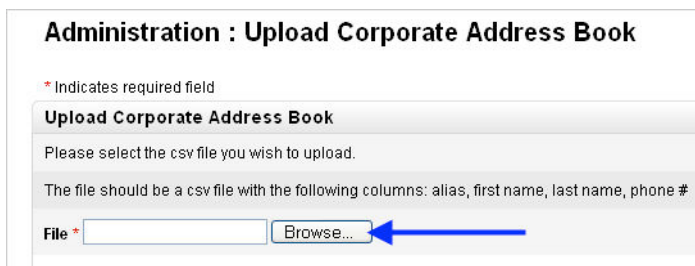
3. Click on the **“Upload”** button.



4. Confirm you want to continue with the upload process by clicking **“OK”** on the **“warning”** window.

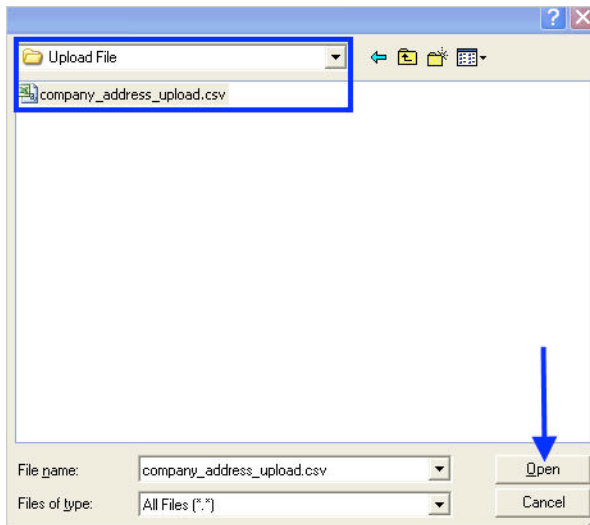


5. Click the **“Browse”** button.





6. Locate the upload file on your computer and click “Open”.



7. Click the “Submit” button. You have successfully uploaded a Company Address Book contact list.

Upload Corporate Address Book

Please select the csv file you wish to upload.

The file should be a csv file with the following columns: alias, first name, last name, phone #

File * C:\Documents and Settings\ [Browse...]

1. Alias Name should not exceed 10 characters.

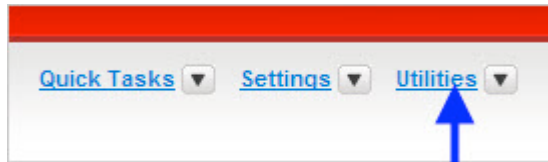
2. Concatenates(joins) First Name and Last Name with a space in between. The total length of this concatenated String(including the space) should not be more than 20 characters.

3. The Phone number should be separated by a "." in the format of xxx-xxx-xxxx.

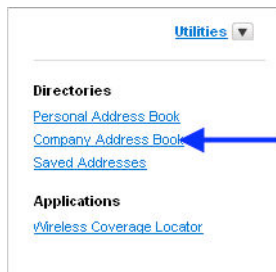
Cancel Submit

How to Add a Contact

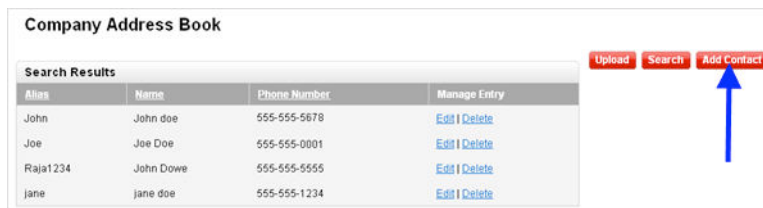
1. Click on the “Utilities” dropdown.



2. Go to “Company Address Book”.



3. Click on the “Add Contact” button in the upper right-hand side of the page.



4. Enter the “Phone Number”, “Alias” and “Name” in their respective fields.

Key points:

- “Alias” field can be letters and/or numbers only, and cannot contain more than ten characters.
- “Name” field can be letters only, and cannot contain more than 20 characters.
- Both fields cannot contain any special characters. For example: *(asterisk), - (dash), _ (underscore), etc.

* Indicates required field

Add Corporate Address Book

Enter an Alias and Name for this number. To edit the Alias or Name later, click on the name in the call details view at any time.

Phone Number *

Alias *

Name *



5. Click the **Submit** button.

* Indicates required field

Add Corporate Address Book

Enter an Alias and Name for this number. To edit the Alias or Name later, click on the name in the call details view at any time.

Phone Number *

Alias *

Name *

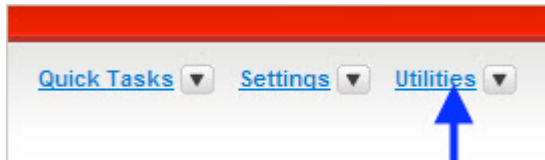
6. The new contact will now appear on the **Company Address Book** page. You have successfully added a new contact.

Search Results			
Alias	Name	Phone Number	Manage Entry
Larry	Doe	555-555-0003	Edit Delete
John	John doe	555-555-9999	Edit Delete
Joe	Joe Doe	555-555-5550	Edit Delete
Raja1234	John Dowe	555-555-5555	Edit Delete
jane	jane doe	555-555-8888	Edit Delete

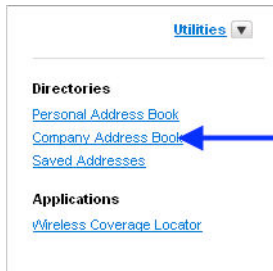
How to Edit Contact Information

If you need to edit a contact's alias and/or name, follow these steps:

1. Click on the **Utilities** dropdown.



2. Go to **Company Address Book**.





3. Click on “**Edit**” next to the contact you want to edit.

Company Address Book			
Search Results			
Alias	Name	Phone Number	Manage Entry
John	John doe	555-555-5678	Edit Delete
Joe	Joe Doe	555-555-0001	Edit Delete
Raja1234	John Dowe	555-555-5555	Edit Delete
jane	jane doe	555-555-1234	Edit Delete

4. Make your desired edits in the “**Alias**” and/or “**Name**” fields.

Key points:

- “Alias” field can be letters and/or numbers only, and cannot contain more than ten characters.
- “Alias” field cannot contain spaces
- “Name” field can be letters only, and cannot contain more than 20 characters.
- Both fields cannot contain any special characters. For example: *(asterisk), - (dash), _ (underscore), etc.

Administration : Edit Corporate Address Book

* Indicates required field

Edit Corporate Address Book

Edit the Alias or Name for this Number.

Phone Number * 555-555-5555

Alias *

Name *

5. Click the “**Submit**” button. You have successfully edited a Company Address Book contact. The contact’s information will be updated.

Administration : Edit Corporate Address Book

* Indicates required field

Edit Corporate Address Book

Edit the Alias or Name for this Number.

Phone Number * 555-555-5555

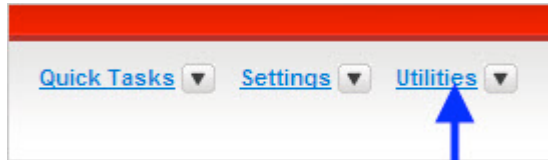
Alias *

Name *

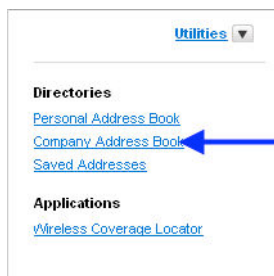
How to Delete a Contact

If you need to delete a contact, follow these steps:

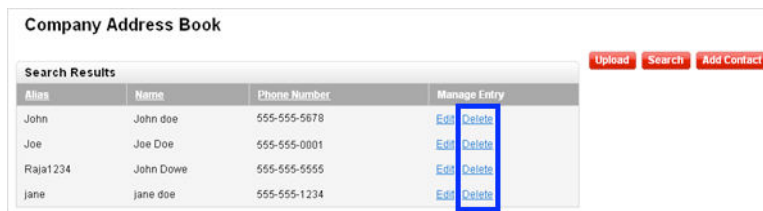
1. Click on the “Utilities” dropdown.



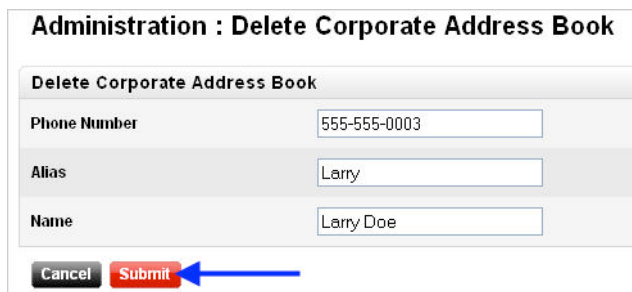
2. Go to “Company Address Book”.



3. Click on “Delete” next to the contact you want to delete.



4. Confirm you have selected the correct contact to delete, and click the “Submit” button. You have successfully deleted a contact.

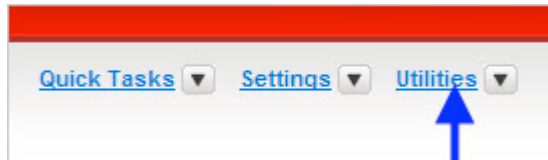


How to Search for a Contact

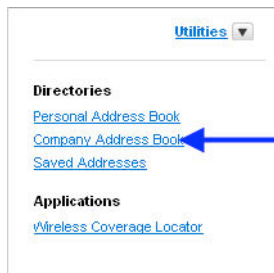
You can search for a contact by their alias, name or phone number.

To search for a contact:

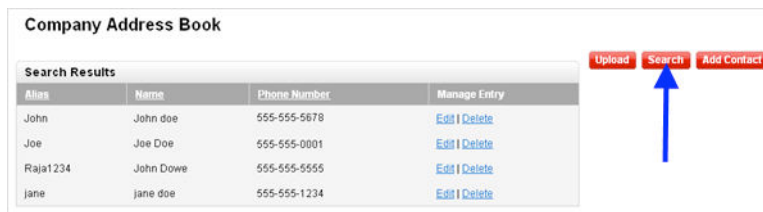
1. Click on the “Utilities” dropdown.



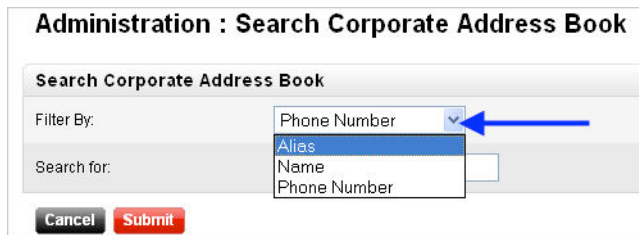
2. Go to “Company Address Book”.



3. Click on the “Search” button.



4. Select how you want to filter your search by selecting “Alias”, “Name”, or “Phone Number” in the “Filter By” dropdown.





5. Enter the name or phone number you want to find in the “**Search for**” field. Note: if you are searching for a contact by “**Name**” you must enter the person’s first and last name. Only exact matches will be found.

Administration : Search Corporate Address Book

Search Corporate Address Book

Filter By:

Search for:

6. Click the “**Submit**” button.

Administration : Search Corporate Address Book

Search Corporate Address Book

Filter By:

Search for:

7. Contacts matching the search criteria will appear in the “**Search Results**” section. You have successfully performed a search for a contact.

Company Address Book

Search Results			
Alias	Name	Phone Number	Manage Entry
Larry	Larry Doe	555-555-0003	Edit Delete

How to Sort Contacts

There are several ways to sort your contact list:

- A – Z (by Alias or Name)
- Z – A (by Alias or name)
- Highest-to-lowest (by Phone Number)
- Lowest-to-highest (by Phone Number)

To sort contacts or toggle sorting direction, click on the column title that you want to sort.

Search Results			
Alias	Name	Phone Number	Manage Entry
Larry	Doe	555-555-0003	Edit Delete
John	John doe	555-555-9999	Edit Delete
Joe	Joe Doe	555-555-5550	Edit Delete
Raja1234	John Dowe	555-555-5555	Edit Delete
jane	jane doe	555-555-8888	Edit Delete